

HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion Capstone Project Documentation

Created By:
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Project Overview:

HandsMen Threads is a dynamic menswear brand seeking to revolutionize its operational efficiency and customer engagement through a strategic Salesforce implementation. This project focuses on building a robust, centralized data model and automating key business processes to enhance data integrity, customer loyalty, and inventory management. The solution will leverage the power of the Salesforce Platform to automate order confirmations, dynamically manage a loyalty program, provide proactive stock alerts, and handle bulk order processing, thereby solidifying the brand's reputation for sophistication and reliability.

Objectives:

Category 1: Data Management & Integrity Objectives

- **Objective 1.1: Establish a Unified Data Foundation**
 - **Description:** Design and implement a custom, scalable Salesforce data model comprising both standard and custom objects (Account, Contact, Order, Product, Loyalty Tier, Inventory Level) to serve as the single source of truth for all customer, sales, and product data.
 - **Success Metric:** 100% of defined business data entities are accurately represented and related within the Salesforce schema. Data migration of key records (Contacts, Products) is completed with >99% accuracy.
- **Objective 1.2: Ensure UI-Level Data Quality**
 - **Description:** Implement validation rules, required fields, and picklists to enforce data integrity directly from the user interface, preventing the entry of invalid or incomplete information.
 - **Success Metric:** Reduce data entry errors by 90% as measured by a decrease in data correction requests or failed processes due to bad data.

Category 2: Process Automation & Efficiency Objectives

- **Objective 2.1: Automate the Customer Order Confirmation Process**
 - **Description:** Configure an automated process (using Flow) that triggers a personalized email confirmation to the customer immediately after their order status is set to "Confirmed."
 - **Success Metric:** 100% of confirmed orders receive an automated email within 5 minutes of confirmation, eliminating manual effort.
- **Objective 2.2: Implement a Dynamic Customer Loyalty Program**
 - **Description:** Develop and deploy a scheduled automation (using Scheduled Flow or Apex) that evaluates customer purchase history daily and automatically assigns or upgrades their loyalty tier (e.g., Silver, Gold, Platinum) based on pre-defined spending thresholds.

Category 3: Customer Relationship & Service Objectives

- **Objective 3.1: Enhance Post-Purchase Customer Communication**
 - **Description:** Use the automated order confirmation system to improve the immediate post-purchase experience, fostering engagement and setting clear expectations.
 - **Success Metric:** Achieve a >60% open rate on automated order confirmation emails, as measured by Marketing Cloud or email analytics.
- **Objective 3.2: Personalize Customer Engagement through Loyalty**
 - **Description:** Leverage the dynamic loyalty tier data to create targeted customer segments for future marketing campaigns and personalized service.

Category 4: Operational & Insight Objectives

- **Objective 4.1: Provide Real-Time Inventory Visibility**
 - **Description:** Ensure that inventory levels are accurately tracked and visible within Salesforce, providing a clear view of stock across the business.
- **Objective 4.2: Demonstrate Core System Functionality**
 - **Description:** Successfully configure and present a fully functional Salesforce org that demonstrates all automated processes working in a live, end-to-end demo scenario.

Phase 1: Requirement Analysis & Planning

This phase focuses on fully understanding the business needs behind the HandsMen Salesforce implementation and outlining a clear plan for execution. The primary requirement is to create an integrated system that manages customer information, product details, order processing, inventory tracking, and marketing initiatives in one central platform. Users need a faster, more accurate way to handle customer transactions, monitor product availability, and run targeted campaigns—solving issues such as manual data entry, lack of visibility, and delayed decision-making.

To ensure alignment, the project scope and objectives are defined in detail. These include: setting up the HandsMen Customer object to store complete customer profiles; configuring the HandsMen Product object for product catalog management; building the HandsMen Order object to streamline order creation, tracking, and fulfillment; developing the Inventory object to maintain real-time stock levels; and enabling the Marketing Campaign object to support promotional activities and performance tracking. Additional objectives involve automating workflows, improving reporting accuracy, and establishing scalable processes.

A well-structured data model and security model will be designed to ensure data integrity and controlled access. The data model will define relationships between Customers, Products, Orders, and Inventory, while the security model will outline role hierarchies, object permissions, field-level security, and sharing settings to protect sensitive information.

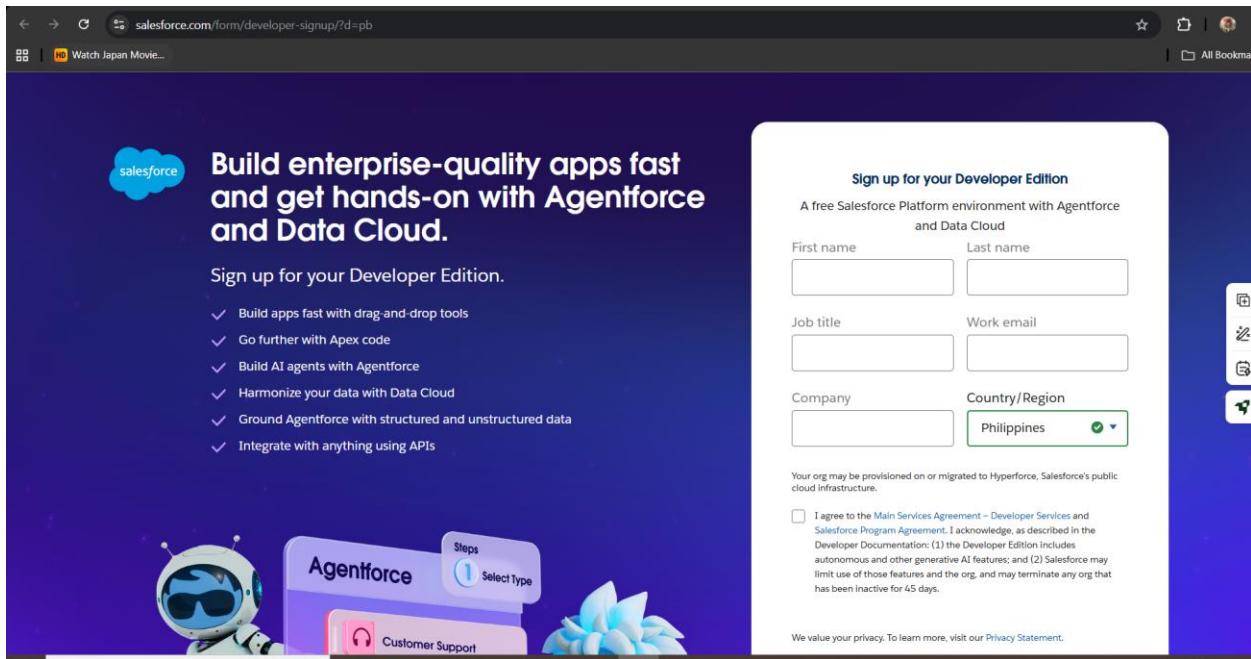
Stakeholder mapping will identify key participants such as sales teams, inventory controllers, marketing personnel, customer service representatives, and management. Each stakeholder group's responsibilities and expectations will be outlined to maintain clarity throughout the project.

Finally, an execution roadmap will be created to guide the implementation process. This roadmap will include timelines for configuration, customization, testing, user training, deployment, and post-launch monitoring. This structured plan ensures that all business requirements are met and enables the HandsMen Salesforce solution to be delivered efficiently and successfully.

Phase 2: Salesforce Development - Backend & Configurations

Screenshots

Signing up for Developer org

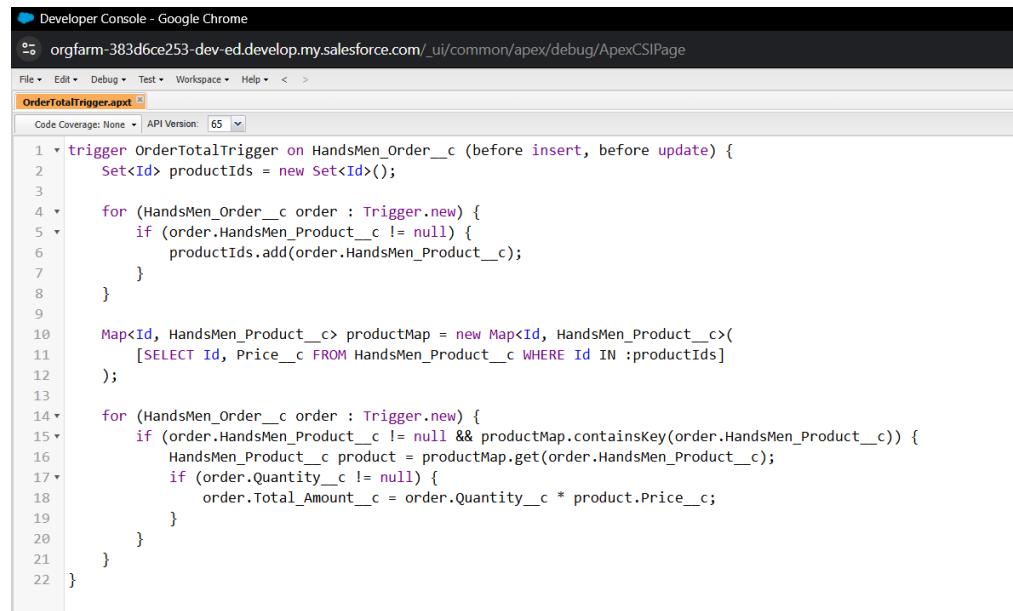


The screenshot shows a web browser displaying the Salesforce Developer Edition sign-up page. The URL in the address bar is salesforce.com/form/developer-signup?d=pb. The page features a dark blue header with the Salesforce logo and a promotional message: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, there's a section titled "Sign up for your Developer Edition" with a list of benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". On the right side, there's a form titled "Sign up for your Developer Edition" which includes fields for First name, Last name, Job title, Work email, Company, and Country/Region (set to Philippines). A note below the form states: "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure." At the bottom, there's a checkbox for agreeing to the Main Services Agreement and a link to the Privacy Statement.

Apex Triggers

Explanation:

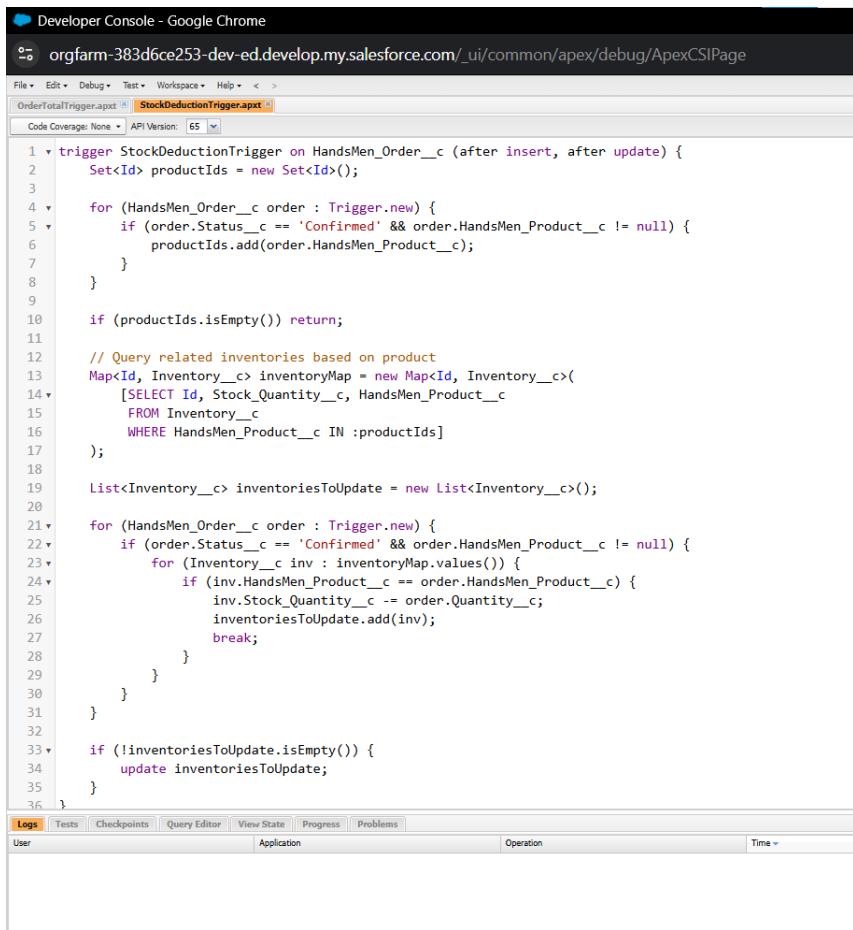
This trigger, `OrderTotalTrigger`, runs automatically before an order is inserted or updated in the `HandsMen_Order__c` object. Its purpose is to calculate the Total Amount of an order based on the selected product and quantity. First, it collects all product IDs referenced in the new or updated orders. Then, it queries the `HandsMen_Product__c` object to get each product's price. After retrieving the product prices, the trigger loops through the orders again and checks if the order has a valid product and quantity. If both exist, it multiplies the product's price by the order quantity and automatically sets the `Total_Amount__c` field. This ensures that every order always has the correct total amount without requiring manual calculation by the user.



The screenshot shows the Salesforce Developer Console interface. The title bar says "Developer Console - Google Chrome" and the URL is "orgfarm-383d6ce253-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The menu bar includes "File", "Edit", "Debug", "Test", "Workspace", "Help". The top navigation bar shows "OrderTotalTrigger.aprx" and "API Version: 65". The main area contains the Apex trigger code:

```
trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
    Set<Id> productIds = new Set<Id>();
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }
    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
    );
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
            if (order.Quantity__c != null) {
                order.Total_Amount__c = order.Quantity__c * product.Price__c;
            }
        }
    }
}
```

The StockDeductionTrigger runs after an order is inserted or updated in the *HandsMen_Order__c* object and is responsible for automatically reducing product inventory when an order is confirmed. The trigger first collects the product IDs from orders whose Status__c is “Confirmed.” It then retrieves the corresponding inventory records linked to those products. After obtaining the related inventory data, the trigger loops through the confirmed orders and matches each one to its inventory record. For every confirmed order, it subtracts the order quantity from the inventory’s Stock_Quantity__c field. All modified inventory records are added to a list and updated in Salesforce. This ensures that product stock levels are always kept accurate and automatically updated whenever a confirmed order is processed.



```

Developer Console - Google Chrome
orgfarm-383d6ce253-dev-ed.develop.my.salesforce.com /ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help < >
OrderTotalTrigger.apxt StockDeductionTrigger.apxt
Code Coverage: None API Version: 65
1 * trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    if (productIds.isEmpty()) return;
11
12    // Query related inventories based on product
13    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
14        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
15         FROM Inventory__c
16         WHERE HandsMen_Product__c IN :productIds]
17    );
18
19    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
20
21    for (HandsMen_Order__c order : Trigger.new) {
22        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
23            for (Inventory__c inv : inventoryMap.values()) {
24                if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
25                    inv.Stock_Quantity__c -= order.Quantity__c;
26                    inventoriesToUpdate.add(inv);
27                    break;
28                }
29            }
30        }
31    }
32
33    if (!inventoriesToUpdate.isEmpty()) {
34        update inventoriesToUpdate;
35    }
36

```

The screenshot shows the Salesforce Developer Console interface. The title bar reads "Developer Console - Google Chrome" and the URL is "orgfarm-383d6ce253-dev-ed.develop.my.salesforce.com /ui/common/apex/debug/ApexCSIPage". The menu bar includes File, Edit, Debug, Test, Workspace, Help, and navigation icons. The top tab is "StockDeductionTrigger.apxt". The code editor displays the Apex trigger code for "StockDeductionTrigger.apxt". The code uses a trigger on the "HandsMen_Order__c" object for insert and update events. It collects product IDs of confirmed orders, queries related inventories, and then iterates through confirmed orders to update their respective inventory records by subtracting their order quantity. The developer console also shows tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems, along with filters for User, Application, Operation, and Time.

Custom Objects

orgfarm-383d6ce253-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgL0000032lIV/Details/view

Watch Japan Movie...

Setup Home Object Manager

SETUP > OBJECT MANAGER
HandsMen Customer

Details

Description

API Name
HandsMen_Customer__c

Custom
✓

Singular Label
HandsMen Customer

Plural Label
HandsMen Customers

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

Edit Delete

Type here to search

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
HandsMen Order

Details

Description

API Name
HandsMen_Order__c

Custom
✓

Singular Label
HandsMen Order

Plural Label
HandsMen Orders

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

5:31 PM 30°C Mostly cloudy ENG 11/23/2025

orgfarm-383d6ce253-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lg0000032In7/Details/view

Watch Japan Movie...

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

HandsMen Product

Details

Description

API Name: HandsMen_Product_c
Custom: ✓
Singular Label: HandsMen Product
Plural Label: HandsMen Products

Enable Reports: ✓
Track Activities
Track Field History
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Details

Description

API Name: Inventory__c
Custom: ✓
Singular Label: Inventory
Plural Label: Inventories

Enable Reports: ✓
Track Activities
Track Field History
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

The screenshot shows the 'Marketing Campaign' object details page in the Salesforce Setup interface. The left sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main content area displays the object's API name as 'Marketing_Campaign__c', its singular label as 'Marketing Campaign', and its plural label as 'Marketing Campaigns'. It also shows deployment status as 'Deployed' and help settings pointing to the standard salesforce.com Help Window.

Fields of Custom Objects

The screenshot shows the 'Email' field details for the 'HandsMen Customer' object. The left sidebar lists configuration options for the field. The main content area shows the field's API name as 'Email', its data type as 'Email', and its object name as 'HandsMen Customer'. It also displays field-level security, validation rules, and general options like required status and uniqueness.

Watch Japan Movie...

Setup Home Object Manager

SETUP > OBJECT MANAGER
HandsMen Customer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules

Phone

Back to HandsMen Customer

Validation Rules [0]

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Phone	Object Name	HandsMen Customer
Field Name	Phone	Data Type	Phone
API Name	Phone_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By Leigh.Torres, 11/14/2025, 2:47 AM Modified By Leigh.Torres, 11/14/2025, 2:47 AM

General Options

Required Default Value

Validation Rules New Validation Rules Help [?]

Help for this Page [?]

Turn here to search

30°C Mostly cloudy

S43 PM

Watch Japan Movie...

Setup Home Object Manager

SETUP > OBJECT MANAGER
HandsMen Customer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules

Loyalty Status

Back to HandsMen Customer

Validation Rules [0]

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Loyalty Status	Object Name	HandsMen Customer
Field Name	Loyalty_Status	Data Type	Picklist
API Name	Loyalty_Status_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By Leigh.Torres, 11/14/2025, 2:48 AM Modified By Leigh.Torres, 11/14/2025, 2:48 AM

General Options

Required Default Value

Help for this Page [?]

Turn here to search

orgfarm-383d6ce253-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgL000003J6t/FieldsAndRelationships/00NgL00002BobJZ/view

Watch Japan Movie...

Setup Home Object Manager

SETUP > OBJECT MANAGER Marketing Campaign

Marketing Campaign Custom Field HandsMen Customer Back to Marketing Campaign

Custom Field Definition Detail Help for this Page

Field Information		Object Name	Marketing Campaign
Field Label	HandsMen Customer	Data Type	Lookup
Field Name	HandsMen_Customer		
API Name	HandsMen_Customer__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Leigh.Torres, 11/14/2025, 2:52 AM	Modified By	Leigh.Torres, 11/14/2025, 2:52 AM
Lookup Options		Child Relationship Name	Marketing_Campaigns
Related To	HandsMen Customer		
Related List Label	Marketing Campaigns		
Required			

philippines.myskillwallet.ai Contact Intelligence View HandsMen Product | Sales! Recent - Google Drive Salesforce Implementation Requirement analysis plan

Watch Japan Movie...

Setup Home Object Manager

SETUP > OBJECT MANAGER HandsMen Product

Fields & Relationships 7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
HandsMen Product Name	Name	Text(80)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(18, 0)		
SKU	SKU__c	Text(60)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		

Validations rules

The image displays two screenshots of the Salesforce Object Manager interface, showing validation rules for the 'HandsMen Order' and 'HandsMen Customer' objects.

HandsMen Order Validation Rule:

- Validation Rule Detail:**
 - Rule Name: Total_Amount
 - Error Condition Formula: Total_Amount_c <= 0
 - Error Message: Please Enter Correct Amount
 - Description: (empty)
 - Created By: Leigh_Torres, 11/14/2025, 3:28 AM
 - Modified By: Leigh_Torres, 11/14/2025, 3:28 AM
- Active:** ✓
- Error Location:** Total Amount

HandsMen Customer Validation Rule:

- Validation Rule Detail:**
 - Rule Name: Email
 - Error Condition Formula: NOT CONTAINS(Email__c, "@gmail.com")
 - Error Message: Please fill Correct Gmail
 - Description: (empty)
 - Created By: Leigh_Torres, 11/14/2025, 3:33 AM
 - Modified By: Leigh_Torres, 11/14/2025, 3:33 AM
- Active:** ✓
- Error Location:** Top of Page

Salesforce Setup - orgfarm-383d6ce253-dev-ed.develop.my.salesforce-setup.com

Watch Japan Movie...

Setup Home Object Manager

SETUP > OBJECT MANAGER
HandsMen Order

HandsMen Order Validation Rule

Validation Rule Detail

Rule Name	Total_Amount	Active
Error Condition Formula	Total_Amount__c <= 0	
Error Message	Please Enter Correct Amount	Error Location
Description		Total Amount
Created By	Leigh Torres, 11/14/2025, 3:28 AM	Modified By
	Leigh Torres, 11/14/2025, 3:28 AM	

Help for this Page ?

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

Back to HandsMen Order

Help for this Page ?

orgfarm-383d6ce253-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgL0000032J01/ValidationRules/03dgL00000fNWvQAM/view

Watch Japan Movie...

Salesforce Setup - orgfarm-383d6ce253-dev-ed.develop.my.salesforce-setup.com

Watch Japan Movie...

Setup Home Object Manager

SETUP > OBJECT MANAGER
Inventory

Inventory Validation Rule

Validation Rule Detail

Rule Name	Stock_Quantity	Active
Error Condition Formula	Stock_Quantity__c <= 0	
Error Message	the inventory count is never less than zero	Error Location
Description		Top of Page
Created By	Leigh Torres, 11/14/2025, 3:31 AM	Modified By
	Leigh Torres, 11/14/2025, 3:31 AM	

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

Back to Inventory

Phase 3: UI/UX Development & Customization

Creating the app

The screenshot shows the 'App Details & Branding' section of the Lightning App Builder. On the left, a sidebar lists 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main area contains fields for 'App Name' (HandsMen Threads), 'Developer Name' (HandsMen_Threads), 'Image' (a placeholder box with an 'Upload' button), 'Primary Color Hex Value' (#0070D2), and a 'Description' field (Enter a description...). Below these are 'Org Theme Options' (checkbox for 'Use the app's image and color instead of the org's custom theme') and an 'App Launcher Preview' section showing a blue square with 'HT' and the text 'HandsMen Threads'.

UI of the objects

The screenshot shows the Salesforce Lightning Experience with the 'HandsMen Customers' object selected. The top navigation bar includes links for 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventory', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', 'Contacts', and a 'New' button. Below the navigation is a 'Recently Viewed' section showing three items: Daniel, John, and Leigh. To the right is a search bar and a toolbar with various icons for actions like New, Import, Change Owner, and Assign Label. The bottom of the screen shows the Windows taskbar with other open applications like Google Drive and a weather widget.

HandsMen Threads

HandsMen Customers | HandsMen Orders | **HandsMen Products** | Inventory | Marketing Campaigns | Reports | Dashboards | Accounts | Contacts

HandsMen Product
Hoodie

New Contact | Edit | New Opportunity

Related Details

HandsMen Product Name: Hoodie | Owner: Leigh Torres

SKU:

Price: \$100

Stock Quantity: 20

Created By: Leigh Torres, 11/23/2025, 12:16 AM

Last Modified By: Leigh Torres, 11/23/2025, 12:16 AM

Inventory

I -0001

New Contact | Edit | New Opportunity

Related Details

Inventory Number: I -0001

HandsMen Product: T-shirt

Stock Quantity: 600

Stock Status: Available

Warehouse:

Created By: Leigh Torres, 11/14/2025, 3:37 AM

Last Modified By: Leigh Torres, 11/22/2025, 6:54 PM

Phase 4: Data Migration, Testing & Security

Roles

Action	Role	Reports To	Report Display Name
Edit Del Assign	CEO	CEO	CEO
Edit Del Assign	CFO	CEO	CFO
Edit Del Assign	Channel Sales Team	Director_Channel Sales	Channel Sales Team
Edit Del Assign	COO	CEO	COO
Edit Del Assign	Customer Support International	SVP_Customer Service & Support	Customer Support, International
Edit Del Assign	Customer Support, North America	SVP_Customer Service & Support	Customer Support, North America
Edit Del Assign	Director_Channel Sales	VP_North American Sales	Director, Channel Sales
Edit Del Assign	Director_Direct Sales	VP_North American Sales	Director, Direct Sales
Edit Del Assign	Eastern Sales Team	Director_Direct Sales	Eastern Sales Team
Edit Del Assign	Installation & Repair Services	SVP_Customer Service & Support	Installation & Repair Services
Edit Del Assign	Inventory	CEO	
Edit Del Assign	Marketing	CEO	
Edit Del Assign	Marketing Team	VP_Marketing	Marketing Team
Edit Del Assign	Sales	CEO	
Edit Del Assign	SVP_Customer Service & Support	CEO	
Edit Del Assign	SVP_Human Resources	CEO	
Edit Del Assign	SVP_Sales & Marketing	CEO	
Edit Del Assign	VP_International Sales	SVP_Sales & Marketing	VP_International Sales
Edit Del Assign	VP_Marketing	SVP_Sales & Marketing	VP_Marketing
Edit Del Assign	VP_North American Sales	SVP_Sales & Marketing	VP_North American Sales
Edit Del Assign	Western Sales Team	Director_Direct Sales	Western Sales Team

All the users

Action	User	Profile
<input type="checkbox"/>	Chatter_Edited	✓ Chatter Free User
<input type="checkbox"/>	OEPIC_OmniFarm	✓ System Administrator
<input type="checkbox"/>	Mikaelson_Daniel	✓ Platform 1
<input type="checkbox"/>	Mikaelson_Kel	✗ Platform 1
<input type="checkbox"/>	Mikaelson_Niklaus	✓ Platform 1
<input type="checkbox"/>	Torres_Leop	✓ System Administrator
<input type="checkbox"/>	User_Intergration	✓ Analytics Cloud Integration User
<input type="checkbox"/>	User_Securit	✓ Analytics Cloud Security User

Testing the objects

Information

* HandsMen Customer Name 

Email 

Phone

Loyalty Status 

FirstName 

LastName 

Total Purchases

Owner  Leigh Torres

[Cancel](#) [Save & New](#) [Save](#)



HandsMen Customer "clark" was created.



New HandsMen Product

* = Required Information

Information

* HandsMen Product Name 

Owner

 Leigh Torres

SKU

Price 

Stock Quantity 

[Cancel](#)

[Save & New](#)

[Save](#)



HandsMen Product "Shorts" was created.



New Inventory

* = Required Information

Information

Inventory Number

* HandsMen Product 

 Shorts 

Stock Quantity 

Warehouse 

[Cancel](#)

[Save & New](#)

[Save](#)



Inventory "I-0003" was created.



Information

HandsMen OrderNumber

Owner

Leigh Torres

HandsMen Product

Shorts



HandsMen Customer

clark



Status

Pending



Quantity

4



Total Amount

* Customer Email

torresleigh240@gmail.com



Cancel

Save & New

Save



HandsMen Order "O-0006" was created.



Phase 5: Deployment, Documentation & Maintenance

In this phase, the completed Salesforce solution is deployed to the production environment using a structured deployment strategy, typically through Change Sets, although tools like Metadata API, SFDX, or DevOps Center may also be used depending on project needs. Once deployed, the system will be maintained through regular monitoring of data quality, automation performance, user activity, and system logs to ensure smooth operation. Routine tasks such as updating validation rules, modifying automation, adding new fields, and resolving user issues will be part of ongoing support. A troubleshooting approach is documented to guide administrators on how to diagnose common problems such as broken automation, missing field permissions, or trigger

errors by checking debug logs, reviewing object configurations, validating user permissions, and testing processes in a sandbox before applying fixes. This ensures long-term stability and continuous improvement of the HandsMen Salesforce system.

Conclusion

The HandsMen Salesforce implementation successfully delivers a streamlined, efficient, and fully integrated system that meets the organization's operational and business requirements. By designing a clear data model, automating core processes, and developing backend logic such as triggers and validations, the platform now supports accurate customer management, product tracking, order processing, inventory control, and marketing coordination. The structured deployment strategy and well-defined maintenance procedures ensure that the system remains stable, scalable, and adaptable to future needs. With complete documentation and a solid troubleshooting framework, the HandsMen team is equipped to manage, optimize, and expand the solution as the business grows. Overall, this project enhances data visibility, improves workflow efficiency, and provides a strong foundation for ongoing digital transformation.