

# **HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion**

A Salesforce Project Documentation

by Christian James D. Torrillo

## **Project Overview**

*HandsMen Threads* is implementing a Salesforce-based Customer Relationship Management (CRM) solution designed to optimize business operations and enhance customer relationships. The project aims to create a centralized data model to efficiently manage critical business information and streamline various workflows. Key features of the CRM include automated order confirmations to improve customer engagement, a dynamic loyalty program to reward repeat customers, proactive stock alerts to prevent stockouts, and scheduled bulk order updates to ensure accurate financial and inventory tracking. This CRM will act as the backbone of the organization's customer service and operations, allowing for real-time updates and seamless communication across all departments.

## **Objectives**

- To improve data accuracy and consistency**

Build a robust data model to maintain data integrity across customer records, orders, and inventory. This reduces errors and ensures decision-makers can rely on accurate data for smarter business decisions, ultimately improving operational efficiency and business forecasting.

- To automate routine processes**

Automate tasks like order confirmations, loyalty status updates, and stock level alerts. This saves time, reduces manual effort, and ensures customers receive timely, consistent communication—leading to improved customer engagement and loyalty, and enhancing overall customer experience.

- To enhance personalization**

Update customer loyalty statuses based on their purchase history to offer personalized rewards. This fosters stronger relationships, encourages repeat business, and boosts customer retention, directly increasing lifetime value and revenue.

- To effectively manage inventory**

Set up automated alerts for low stock levels, ensuring timely restocking and preventing stockouts. This improves product availability, avoids missed sales,

and enhances customer satisfaction by ensuring that products are consistently in stock when needed.

- **To streamline financial and inventory updates**

Automate bulk order updates and daily inventory adjustments. This ensures accurate financial records and real-time inventory levels, reducing manual errors, improving operational flow, and supporting better resource planning and cash flow management.

## **Phase 1: Requirement Analysis & Planning**

### **1.1. Business Requirements**

- **Customer Relationship Management:** The business needs a CRM solution that centralizes customer data (e.g., accounts, contacts, orders) to improve customer engagement, streamline sales, and enhance service delivery.
- **Order Management:** A seamless process for capturing and tracking customer orders, from order creation to payment and shipment. This includes automated features like order confirmations and stock alerts to minimize errors and ensure timely fulfillment.
- **Inventory Management:** Real-time visibility into inventory levels and automatic stock alerts for proactive restocking, reducing the risk of stockouts and overstocking.

### **1.2. Project Scope**

- Centralized management of Customer Data (Account, Contact, and Opportunity records).
- Order Management system integrated with Inventory Management.
- Loyalty Program to track and reward customer behavior.
- Automated processes such as Order Confirmations, Stock Alerts, and Bulk Order Updates.

## 1.3. Design Data Model

- **HandsMen Customers**

Stores detailed information about individual customers or client accounts, including personal contact details, purchase history, and loyalty status. This object helps manage and track customer relationships.

The screenshot shows the Salesforce Object Manager interface for the 'HandsMen Customer' object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with 11 items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedBy), Email (Email\_\_c), FirstName (FirstName\_\_c), FullName (FullName\_\_c), HandsMen Customer Name (Name), Last Modified By (LastModifiedBy), and LastName (LastName\_\_c). The 'Name' field is highlighted with a checkmark in the 'CONTROLLING FIELD' column.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Email	Email__c	Email		
FirstName	FirstName__c	Text(60)		
FullName	FullName__c	Formula (Text)		
HandsMen Customer Name	Name	Text(80)	✓	
Last Modified By	LastModifiedBy	Lookup(User)		
LastName	LastName__c	Text(60)		

- **HandsMen Orders**

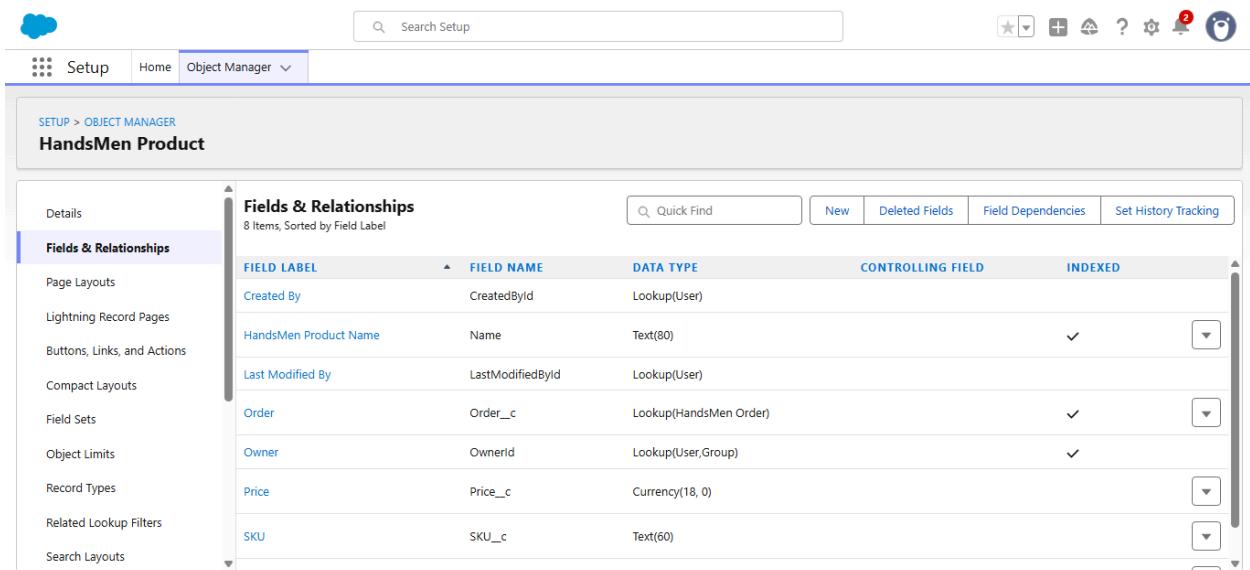
Tracks customer orders from creation to fulfillment. It includes details like order items, quantities, order status, and the product ordered.

The screenshot shows the Salesforce Object Manager interface for the 'HandsMen Order' object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with 10 items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedBy), Customer (Customer\_\_c), Customer Email (Customer\_Email\_\_c), HandsMen OrderNumber (Name), HandsMen Product (HandsMen\_Product\_\_c), Last Modified By (LastModifiedBy), and Owner (OwnerId). The 'Name' field is highlighted with a checkmark in the 'CONTROLLING FIELD' column.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Customer	Customer__c	Lookup(HandsMen Customer)	✓	
Customer Email	Customer_Email__c	Email		
HandsMen OrderNumber	Name	Auto Number	✓	
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)	✓	
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	

- **HandsMen Products**

Maintains a catalog of products offered by HandsMen Threads, including product details such as name, description, pricing, and SKU. This object is linked to both the Orders and Inventories objects to track product availability and sales.

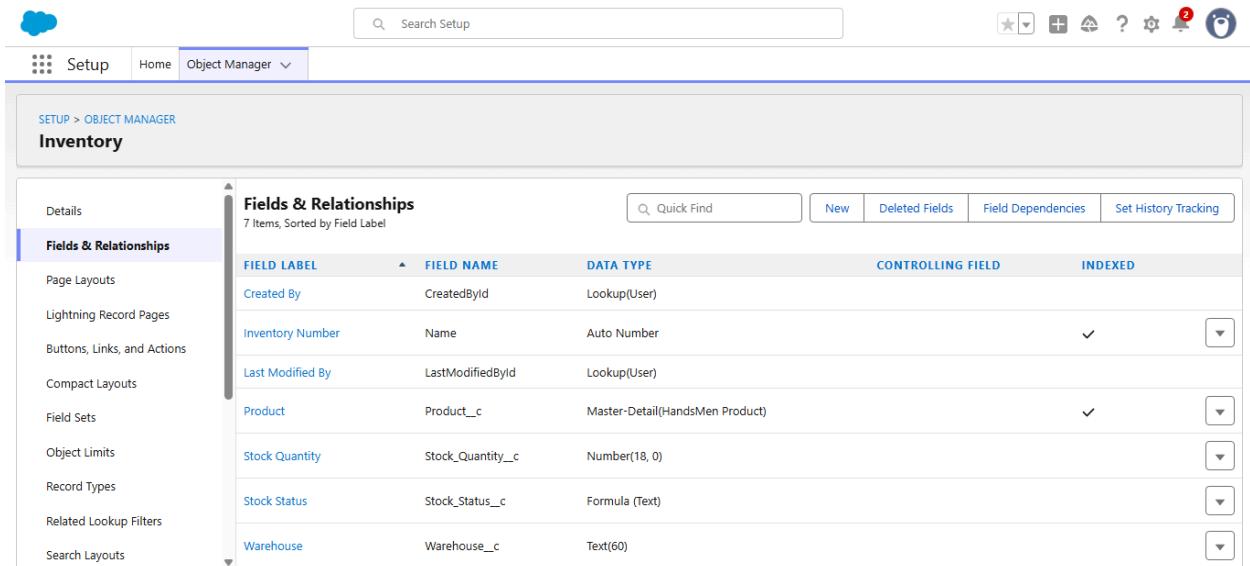


The screenshot shows the Salesforce Object Manager interface for the 'HandsMen Product' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main area displays the 'Fields & Relationships' section with 8 items, sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED status. Key fields shown include Created By (CreatedById, Lookup(User)), HandsMen Product Name (Name, Text(80)), Last Modified By (LastModifiedById, Lookup(User)), Order (Order\_\_c, Lookup(HandsMen Order)), Owner (OwnerId, Lookup(User,Group)), Price (Price\_\_c, Currency(18, 0)), and SKU (SKU\_\_c, Text(60)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product Name	Name	Text(80)	✓	▼
Last Modified By	LastModifiedById	Lookup(User)		
Order	Order__c	Lookup(HandsMen Order)	✓	▼
Owner	OwnerId	Lookup(User,Group)	✓	
Price	Price__c	Currency(18, 0)		▼
SKU	SKU__c	Text(60)		▼

- **Inventories**

Manages the stock levels of products, including data on stock quantities and warehouses. This object helps ensure real-time visibility into inventory status and triggers automatic stock alerts when levels are low.



The screenshot shows the Salesforce Object Manager interface for the 'Inventory' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main area displays the 'Fields & Relationships' section with 7 items, sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED status. Key fields shown include Created By (CreatedById, Lookup(User)), Inventory Number (Name, Auto Number), Last Modified By (LastModifiedById, Lookup(User)), Product (Product\_\_c, Master-Detail(HandsMen Product)), Stock Quantity (Stock\_Quantity\_\_c, Number(18, 0)), Stock Status (Stock\_Status\_\_c, Formula (Text)), and Warehouse (Warehouse\_\_c, Text(60)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Inventory Number	Name	Auto Number	✓	▼
Last Modified By	LastModifiedById	Lookup(User)		
Product	Product__c	Master-Detail(HandsMen Product)	✓	▼
Stock Quantity	Stock_Quantity__c	Number(18, 0)		▼
Stock Status	Stock_Status__c	Formula (Text)		▼
Warehouse	Warehouse__c	Text(60)		▼

- **Marketing Campaign**

Tracks and manages marketing initiatives, including details about campaign goals, target audience, budget, channels, and performance metrics.

**Marketing Campaign**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date/Time		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)	✓	▼
Last Modified By	LastModifiedBy	Lookup(User)		
Marketing Campaign Number	Name	Auto Number	✓	▼
Owner	OwnerId	Lookup(User,Group)	✓	
Start Date	Start_Date__c	Date/Time		▼

## 1.4. Security Model

- **Profiles and Roles**

Define profiles based on user roles (e.g., Sales Rep, Customer Service, Warehouse Manager) to control access to specific records and objects. Set permissions for each profile, determining whether users can view, create, edit, or delete records.

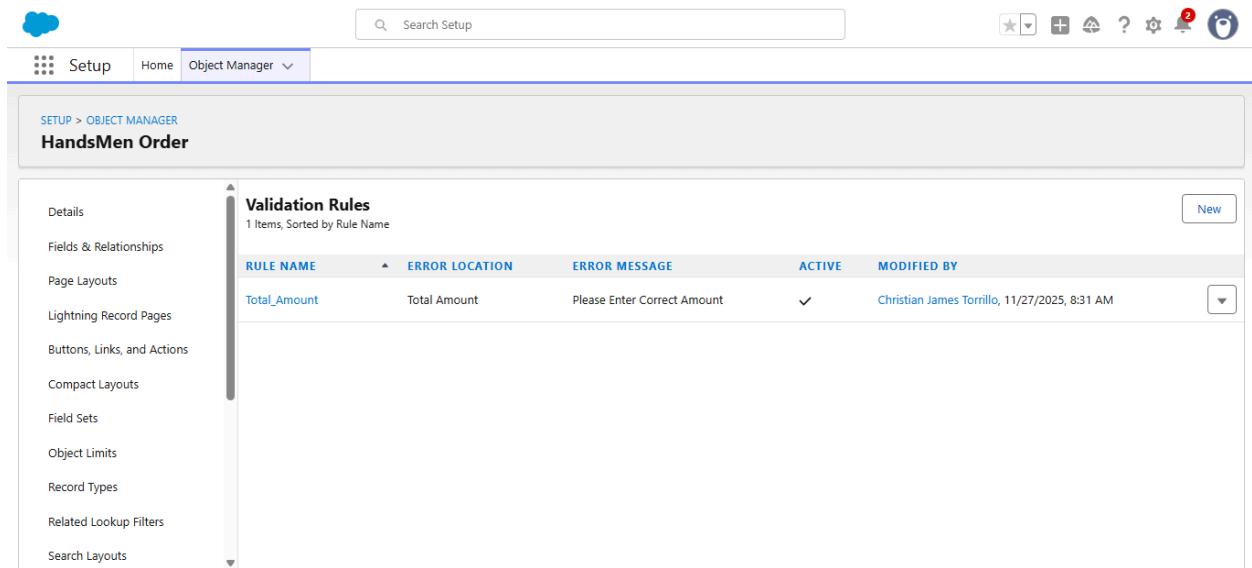
**Roles**

YOUR ORGANIZATION'S ROLE HIERARCHY

- PUP STC
  - Add Role
  - CEO
    - Add Role
    - CEO
  - COO
    - Add Role
    - COO
  - Inventory
    - Add Role
    - Inventory
  - Marketing
    - Add Role
    - Marketing
  - Sales
    - Add Role
    - Sales
  - SVP, Customer Service & Support
    - Add Role
    - SVP, Customer Service & Support
  - SVP, Human Resources
    - Add Role
    - SVP, Human Resources
  - SVP, Sales & Marketing
    - Add Role
    - SVP, Sales & Marketing

- **Validation Rules**

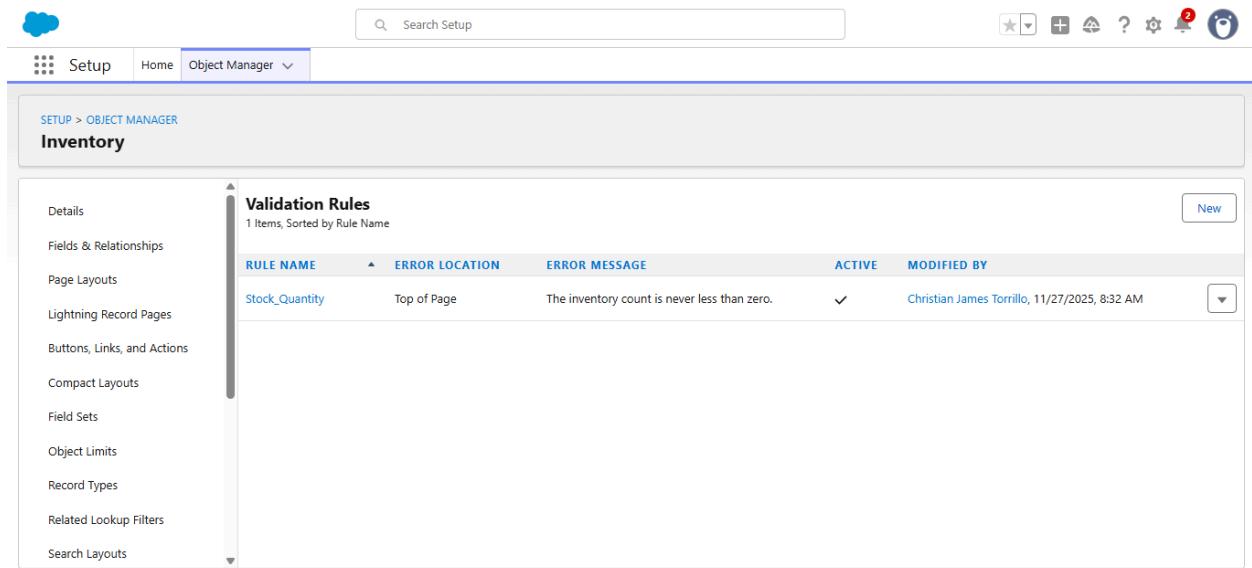
Validation rules are used to ensure that the data entered into Salesforce meets specific criteria before it is saved.



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'HandsMen Order' object, the 'Validation Rules' section is displayed. A single rule named 'Total\_Amount' is listed, which checks the 'Total Amount' field and displays the message 'Please Enter Correct Amount'. The rule is active and was modified by Christian James Torrillo on November 27, 2025, at 8:31 AM.

Rule Name	Error Location	Error Message	Active	Modified By
Total_Amount	Total Amount	Please Enter Correct Amount	✓	Christian James Torrillo, 11/27/2025, 8:31 AM

*This rule ensures that the Total Amount for an Order cannot be less than or equal to zero.*



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'Inventory' object, the 'Validation Rules' section is displayed. A single rule named 'Stock\_Quantity' is listed, which checks the 'Stock Quantity' field and displays the message 'The inventory count is never less than zero.'. The rule is active and was modified by Christian James Torrillo on November 27, 2025, at 8:32 AM.

Rule Name	Error Location	Error Message	Active	Modified By
Stock_Quantity	Top of Page	The inventory count is never less than zero.	✓	Christian James Torrillo, 11/27/2025, 8:32 AM

*This rule prevents the Stock Quantity of an inventory record from being zero or negative. It ensures that the stock level is always greater than zero, thus avoiding situations where products are incorrectly marked as available when they are out of stock.*

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager
- Section:** SETUP > OBJECT MANAGER
- Object:** HandsMen Customer
- Left sidebar:**
  - 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
- Table:** Validation Rules
 

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email	Top of Page	Please fill Correct Gmail	✓	Christian James Torillo, 11/27/2025, 8:34 AM

This rule ensures that the email address entered must be valid.

## 1.5. Stakeholders Mapping

- Sales Team**

Manages customer relationships and sales opportunities. They rely on CRM data to track leads, manage orders, and close deals with customers.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager
- Section:** SETUP > OBJECT MANAGER
- Object:** Users
- Left sidebar:**
  - Q users
  - Users
  - Permission Set Groups
  - Permission Sets
  - Profiles
  - Public Groups
  - Queues
  - Roles
  - User Management Settings
  - Users** (selected)
  - Feature Settings
  - Data.com
  - Prospector Users
- User Detail:**

User Detail		Edit		Sharing		Reset Password		Freeze		View Summary	
Name	Niklaus Mikaelson	Role	Sales	User License	Salesforce	Profile	Platform_1	Active	✓	Marketing User	□
Alias	nmika	Profile	Platform_1	Offline User	□	Knowledge User	□	Title	□	Flow User	□
Email	cj29070@gmail.com [Verify] ⓘ	Department	Service Cloud User	Site.com Contributor User	□	Site.com Publisher User	□	Company	□	WDC User	□
Username	cj29070916@gmail.com	Division	Site.com Publisher User	Site.com Contributor User	□	WDC User	□	Address	□	WDC User	□
Nickname	User17642617936548707235 ⓘ	Time Zone	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)	Site.com Contributor User	□	WDC User	□	Locale	English (United States)	WDC User	□
- Help:** User Profile Help for this Page ⓘ

- **Inventory Team**

Oversees product stock levels and ensures accurate inventory management. They use the CRM to monitor product availability and manage stock alerts for timely restocking.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected in the sidebar. The main area displays the 'User Detail' page for a user named 'Kol Mikaelson'. The 'Role' section is expanded, showing various user roles such as 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User'. The 'Inventory' role is also listed. The 'User License' is set to 'Salesforce' and the 'Profile' is 'Platform\_1'. Other details shown include Name (Kol Mikaelson), Alias (kmika), Email (cj29070@gmail.com), Username (cj29070917@gmail.com), Nickname (User17642618533121860766), Title (empty), Company (empty), Department (empty), Division (empty), Address (empty), Time Zone (GMT-08:00 Pacific Standard Time (America/Los\_Angeles)), and Locale (English (United States)). A note at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

- **Marketing Team**

Focuses on customer engagement and campaign management. They use CRM insights to segment customers, create targeted marketing campaigns, and drive sales growth.

This screenshot is identical to the one above, showing the Salesforce Setup interface with the 'Users' tab selected. It displays the 'User Detail' page for 'Kol Mikaelson', specifically focusing on the 'Role' section. The roles listed are Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. The 'User License' is Salesforce and the 'Profile' is Platform\_1. Other user details like Name, Email, and Time Zone are also visible.

## **1.6. Execution RoadMap**

### **Phase 1: Architecture & Planning**

- Define objects, fields, relationships, formula fields.
- Establish validation rules, flows, Apex triggers, batch jobs.
- Design email templates for notifications and customer communication.

### **Phase 2: Development**

- Object and field creation.
- Implement automation (flows, process builders, Apex triggers).
- Set up data security and sharing rules.
- Develop batch jobs for scheduled processing.
- Configure email templates and notifications.

### **Phase 3: Testing & QA**

- Unit testing of objects and automation.
- End-to-end testing with sample data.
- Performance testing and security checks.

### **Phase 4: Deployment & Training**

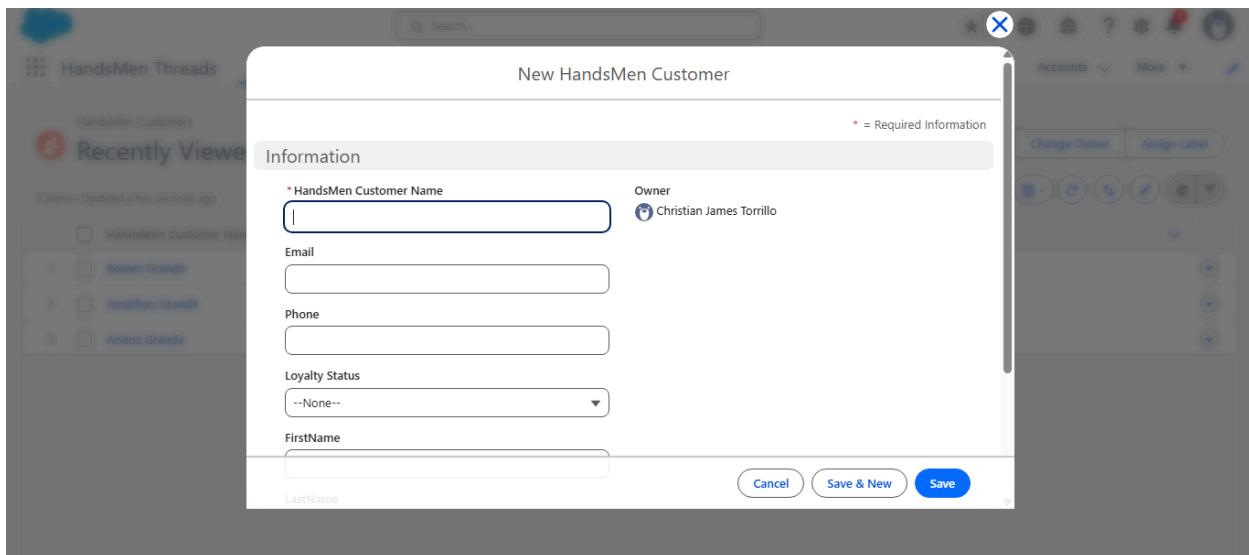
- Deploy to production.
- Train users on new functionality.
- Post-go-live support and monitoring

## Phase 2: Salesforce Development - Backend & Configurations

### 2.1. Customization of Objects, Fields, Validation Rules, Automation (Workflow Rules, Process Builder, Flows, Approval Process)

#### 1. HandsMen Customer\_c

- **Type:** Custom Object
- **Description:** Stores detailed information about individual customers, including their contact information, loyalty status, and purchase history.
- **Key Fields:**
  - **Name** (Record Name): Customer's name (Text).
  - **Email** (Email): Customer's email address.
  - **Phone** (Phone): Customer's phone number.
  - **Loyalty\_Status\_c** (Picklist: Bronze, Gold, Silver): Loyalty status of the customer (predefined picklist values).
  - **Total\_Purchases\_c** (Number): Total value of purchases made by the customer.



## 2. HandsMen Product\_c

- **Type:** Custom Object
- **Description:** Stores information about the products in the HandsMen Threads catalog, including pricing and stock quantities.
- **Key Fields:**
  - **Name** (Record Name): Product name (Text).
  - **SKU** (Text): Unique stock-keeping unit identifier for the product.
  - **Price** (Currency): Price of the product.
  - **Stock\_Quantity\_c** (Number): Quantity of the product available in inventory.

The screenshot shows a Salesforce interface for creating a new order. The main title is "New HandsMen Order". A note at the top right indicates "\* = Required Information". The form has a tab labeled "Information". It includes fields for "HandsMen OrderNumber" (with a placeholder "12345678901234567890123456789012"), "Owner" (set to "Christian James Torrillo"), "Customer" (a search bar with placeholder "Search HandsMen Customers..."), "Status" (a dropdown menu showing "--None--"), "Quantity" (an input field), and "Total Amount" (an input field). At the bottom, there are buttons for "Cancel", "Save & New", and "Save".

### 3. HandsMen Order\_c

- **Type:** Custom Object
- **Description:** Tracks customer orders, including the order number, status, quantities, and total amount.
- **Key Fields:**
  - **Order\_Number** (Record Name): Unique identifier for each order (Text).
  - **Status** (Picklist: Pending, Confirmed, Rejection): The current status of the order.
  - **Quantity\_\_c** (Number): Quantity of items in the order.
  - **Total\_Amount\_\_c** (Number): Total amount of the order (in currency).

The screenshot shows a Salesforce interface for creating a new record. The title bar says "New HandsMen Order". Below it, a section titled "Information" contains the following fields:

- "HandsMen OrderNumber": A text input field with placeholder text "Search HandsMen Customers..." and a magnifying glass icon.
- "Owner": A section showing the current owner as "Christian James Torrillo" with a small profile picture.
- "Customer": A dropdown menu labeled "Search HandsMen Customers..." with a magnifying glass icon.
- "Status": A dropdown menu currently set to "--None--".
- "Quantity": An empty text input field.
- "Total Amount": An empty text input field.

At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save". To the left of the form, a sidebar shows a list of recent activity: "1 item updated a few seconds ago" and a link to "HandsMen OrderNumber O-0010".

#### 4. Inventory\_c

- **Type:** Custom Object
- **Description:** Tracks inventory levels for products in the warehouse, including stock quantities and warehouse locations.
- **Key Fields:**
  - **Auto Number** (Record Name): Unique auto-generated record ID for each inventory entry.
  - **Warehouse** (Text): The location or name of the warehouse where the stock is stored.
  - **Stock\_Quantity\_c** (Number): Quantity of the product available in the specified warehouse.

The screenshot shows a software interface for managing inventory. A modal window titled "New Inventory" is open, prompting for information. The "Information" section contains fields for "Inventory Number" (with a note "\* = Required Information"), "Product" (a search bar with placeholder "Search HandsMen Products..."), "Stock Quantity" (an empty input field), and "Warehouse" (an empty input field). At the bottom of the modal are three buttons: "Cancel", "Save & New", and "Save". The background shows a dark grey dashboard with various icons and sections like "HandsMen Threads", "Inventories", and "Recently Viewed".

## 5. Marketing Campaign\_c

- **Type:** Custom Object
- **Description:** Manages and tracks marketing campaigns and promotions, including start and end dates, as well as campaign details.
- **Key Fields:**
  - **Campaign\_Name** (Record Name): Name of the marketing campaign (Text).
  - **Start\_Date** (Date): Start date of the marketing campaign.
  - **End\_Date** (Date): End date of the marketing campaign.

The screenshot shows the Salesforce interface for creating a new Marketing Campaign. The title bar says "New Marketing Campaign". Below it, there's a section titled "Information" with the following fields:

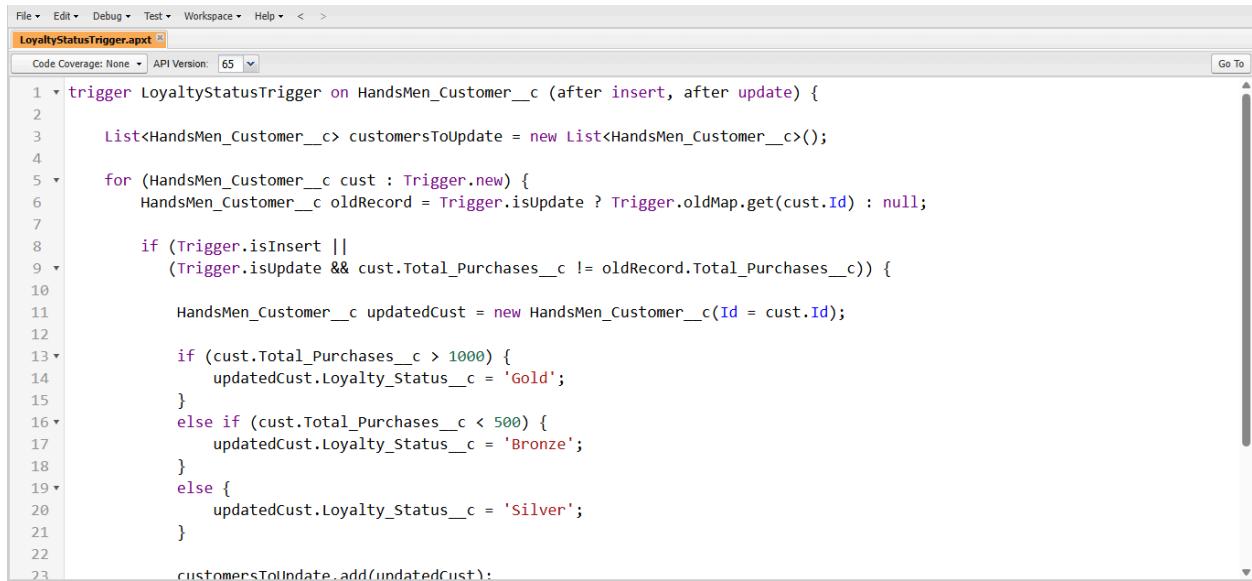
- "Marketing Campaign Number": A field with a note "\* = Required Information".
- "Owner": Set to "Christian James Torrillo".
- "HandsMen Customer": A search bar labeled "Search HandsMen Customers..." with a magnifying glass icon.
- "Start Date": Two input fields for Date and Time.
- "End Date": Two input fields for Date and Time.

At the bottom right of the form are three buttons: "Cancel", "Save & New", and a blue "Save" button.

## 2.2. Apex Classes, Triggers, Asynchronous Apex Classes

### 1. Update Order Total

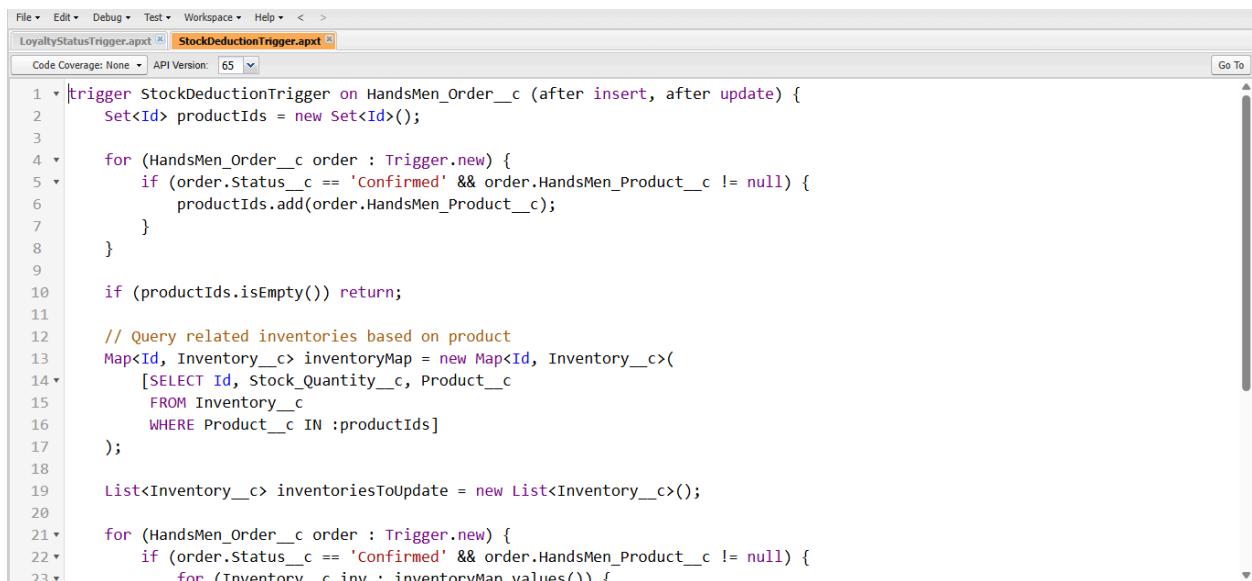
- Automatically updates the **Total\_Amount\_\_c** field on the order based on the price of the product and quantity of the order.



```
File Edit Debug Test Workspace Help < >
LoyaltyStatusTrigger.apxt [ ]
Code Coverage: None API Version: 65 Go To
1 trigger LoyaltyStatusTrigger on HandsMen_Customer__c (after insert, after update) {
2
3     List<HandsMen_Customer__c> customersToUpdate = new List<HandsMen_Customer__c>();
4
5     for (HandsMen_Customer__c cust : Trigger.new) {
6         HandsMen_Customer__c oldRecord = Trigger.isUpdate ? Trigger.oldMap.get(cust.Id) : null;
7
8         if (Trigger.isInsert ||
9             (Trigger.isUpdate && cust.Total_Purchases__c != oldRecord.Total_Purchases__c)) {
10
11             HandsMen_Customer__c updatedCust = new HandsMen_Customer__c(Id = cust.Id);
12
13             if (cust.Total_Purchases__c > 1000) {
14                 updatedCust.Loyalty_Status__c = 'Gold';
15             }
16             else if (cust.Total_Purchases__c < 500) {
17                 updatedCust.Loyalty_Status__c = 'Bronze';
18             }
19             else {
20                 updatedCust.Loyalty_Status__c = 'Silver';
21             }
22
23             customersToUpdate.add(updatedCust);
24
25     }
26
27     customersToUpdate.update();
28 }
```

### 2. Stock Deduction

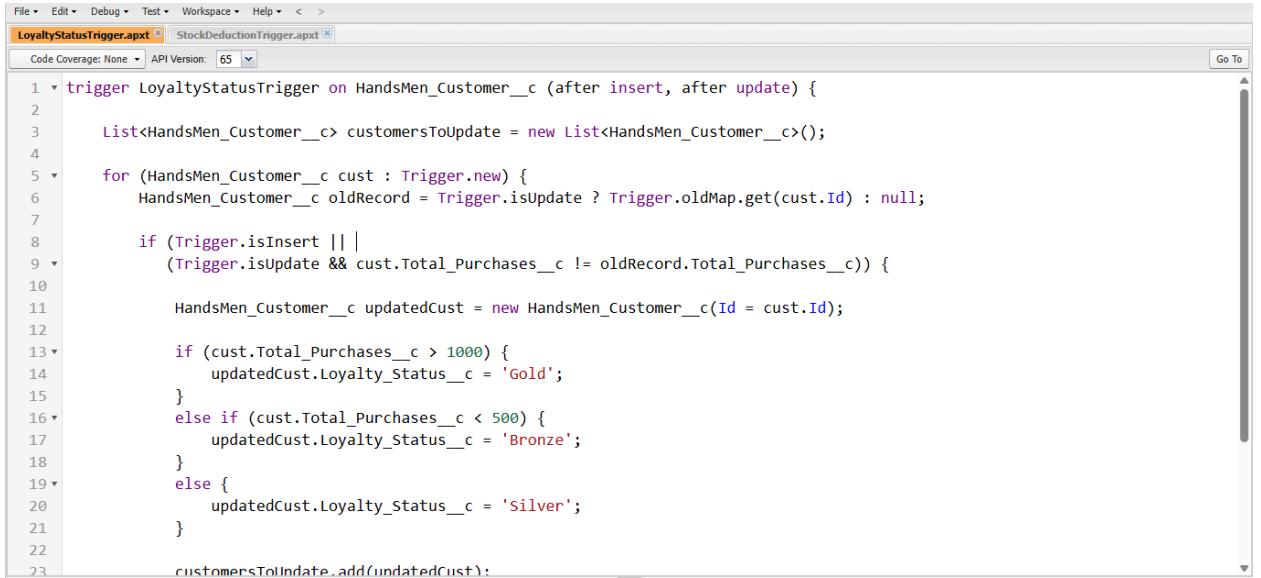
- Reduces the available stock quantity in the **Inventory\_\_c** object whenever an order is placed and confirmed, ensuring accurate inventory tracking.



```
File Edit Debug Test Workspace Help < >
LoyaltyStatusTrigger.apxt [ ] StockDeductionTrigger.apxt [ ]
Code Coverage: None API Version: 65 Go To
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, Product__c
15         FROM Inventory__c
16         WHERE 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()) {
```

### 3. Loyalty Status Update

- Automatically upgrades a customer's **Loyalty\_Status\_\_c** based on the all-time value of their purchases.



The screenshot shows the Salesforce IDE interface with the file `LoyaltyStatusTrigger.apxt` open. The code implements a trigger on the `HandsMen_Customer__c` object, triggered after insert or update. It retrieves the total purchases for each customer and updates their loyalty status based on the following rules:

- If total purchases > 1000, set status to Gold.
- If total purchases < 500, set status to Bronze.
- Otherwise, set status to Silver.

```
trigger LoyaltyStatusTrigger on HandsMen_Customer__c (after insert, after update) {
    List<HandsMen_Customer__c> customersToUpdate = new List<HandsMen_Customer__c>();
    for (HandsMen_Customer__c cust : Trigger.new) {
        HandsMen_Customer__c oldRecord = Trigger.isUpdate ? Trigger.oldMap.get(cust.Id) : null;
        if (Trigger.isInsert || | Trigger.isUpdate && cust.Total_Purchases__c != oldRecord.Total_Purchases__c)) {
            HandsMen_Customer__c updatedCust = new HandsMen_Customer__c(Id = cust.Id);
            if (cust.Total_Purchases__c > 1000) {
                updatedCust.Loyalty_Status__c = 'Gold';
            } else if (cust.Total_Purchases__c < 500) {
                updatedCust.Loyalty_Status__c = 'Bronze';
            } else {
                updatedCust.Loyalty_Status__c = 'Silver';
            }
            customersToUpdate.add(updatedCust);
        }
    }
}
```

### 3.1. Lightning App setup through App Manager

The screenshot shows the Salesforce App Manager interface. At the top, there's a navigation bar with icons for Home, Search, and various system settings. Below the bar, the main header reads "HandsMen Customers". A "Recently Viewed" section lists three items: "Bowen Grande", "Jonathan Grande", and "Ariana Grande", each with a checkbox and a blue circular icon. To the right of this list are buttons for "New", "Import", "Change Owner", and "Assign Label". Below the list is a search bar labeled "Search this list..." and a set of filter and sort icons.

### 3.2. User Management

The screenshot shows the Salesforce Setup interface. The left sidebar has sections for "Setup", "Home", and "Object Manager". Under "Setup", "Users" is selected, indicated by a yellow background. Other options include "Permission Set Groups", "Permission Sets", "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings", "Feature Settings", "Data.com", and "Prospector". A global search bar at the top left contains the text "users". The main content area is titled "All Users" and contains a table of user records. The table headers are "Action", "Full Name", "Alias", "Username", "Role", "Active", and "Profile". The table body lists several users with their details:

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter_Expert	Chatter	chaty.00dg00000fsu7xuav.05mfokh3uvoc@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	EPIC_OrgFarm	OEPICT	epic.a88978c08db5@orgfarm.salesforce.com		✓	System Administrator
<a href="#">Edit</a>	James_Christian	cjame	cj29070919@gmail.com	Marketing	✓	Platform 1
<a href="#">Edit</a>	Mikaelson_Kol	kmika	cj29070917@gmail.com	Inventory	✗	Platform 1
<a href="#">Edit</a>	Mikaelson_Niklaus	nmika	cj29070916@gmail.com	Sales	✓	Platform 1
<a href="#">Edit</a>	Torillo_Christian_James	tor	torillo.christianjames62@agentforce.com		✓	System Administrator
<a href="#">Edit</a>	User_Integration	integ	integration@00dg00000fsu7xuav.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssecurity@00dg00000fsu7xuav.com		✓	Analytics Cloud Security User

### 3.3. Reports and Dashboards

The screenshot shows the 'Reports' section of the HandsMen Threads application. On the left, a sidebar lists categories: 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', and 'Favorites', 'All Favorites'. The main area displays a table of recent reports:

Report Name	Description	Folder	Created By	Created On	Subscribed
New HandsMen Products Report	Private Reports	Christian James Torrillo	11/28/2025, 2:41 AM	<input checked="" type="checkbox"/>	
HandsMen Orders Report	Private Reports	Christian James Torrillo	11/28/2025, 2:38 AM	<input checked="" type="checkbox"/>	

The screenshot shows the 'Dashboards' section of the HandsMen Threads application. The title is 'Orders' and it indicates 'As of Nov 28, 2025, 2:43 AM' and 'Viewing as Christian James Torrillo'. There are two reports displayed side-by-side:

- HandsMen Orders Report**: Shows a table of order details. The columns are 'HandsMen Order: HandsMen OrderNu...', 'Custo...', and 'HandsMen ...'. The data rows are:

O-0001	Ariana Grande	Hoodie
O-0002	Ariana Grande	-
O-0003	Ariana Grande	Hoodie
O-0004	Ariana Grande	Hoodie
O-0005	Ariana Grande	Hoodie
- New HandsMen Products Report**: Shows a table of product details. The columns are 'HandsMen Product: HandsMen Product Name' and 'Price'. The data row is:

Hoodie	\$500
--------	-------

At the bottom of each report, there is a link to 'View Report' and the timestamp 'As of Nov 28, 2025, 2:43 AM'.

## Phase 4: Data Migration, Testing & Security

## **4.1. Data Loading Process (Data Import Wizard, Data Loader)**

The data loading process for HandsMen Threads will involve tools like the Data Import Wizard and Data Loader to efficiently migrate data into Salesforce.

- Data Import Wizard: It's a user-friendly, browser-based tool available directly in Salesforce and is useful for importing common objects like Accounts, Contacts, Leads, and Opportunities. It provides step-by-step guidance and supports CSV file uploads.
- Data Loader: It's a client application that supports both insert, update, upsert, and delete operations on Salesforce data. It can handle bulk data processing and is suitable for automated data import/export tasks.

## **4.2. Field History Tracking, Duplicate Rules, Matching Rules should be documented**

To ensure data integrity and consistency within Salesforce, Field History Tracking, Duplicate Rules, and Matching Rules will be implemented as part of the data governance process.

- **Field History Tracking**

Salesforce will be configured to track changes made to key fields in critical objects like Customer, Order, and Product. This feature will capture historical changes for up to 20 fields on any object, allowing administrators to view past values, who made the change, and when the change occurred. It is particularly useful for auditing and ensuring data integrity over time.

- **Duplicate Rules**

Duplicate rules will be implemented to prevent the creation of duplicate records in Salesforce. Rules will be defined for key objects like Customer and Order to flag potential duplicates based on matching fields such as Email Address or Phone Number. When duplicates are found, users will be alerted or prevented from saving the records.

- **Matching Rules**

Matching rules define the criteria that Salesforce uses to identify potential duplicate records. For example, a matching rule for the Customer object might look for records with the same Email or Phone number. These rules are aligned with the duplicate rules to ensure data quality and prevent redundant entries.

#### **4.3. Profiles, Roles and Role Hierarchy, Permission sets, Sharing Rules**

The Profiles, Roles, and Permission Sets will be configured to ensure appropriate data access and security across Salesforce users, while Sharing Rules will be used to fine-tune access at the record level.

- **Profiles**

Profiles determine the base level of permissions that a user has, such as access to objects, fields, and page layouts. For instance, a Sales Rep profile might have full access to Accounts and Opportunities, while a Support Rep might only have access to Cases and Contacts.

- **Roles and Role Hierarchy:**

Roles define a user's position within the organization and control record visibility. The role hierarchy ensures that users higher in the hierarchy (e.g., Managers or Executives) can view records owned by users in lower roles, enabling proper access to relevant data across the org.

- **Permission Sets**

Permission Sets will be used to grant additional access to users without changing their profile. For example, a Sales Rep profile may have limited access to certain features, but a permission set can be applied to provide access to a specific report or record type temporarily or permanently.

- **Sharing Rules**

Sharing rules are used to extend access to records beyond the role hierarchy. For example, a sharing rule might be set to share Account records with users in a specific department or group. This is particularly useful for cross-functional teams that need access to the same records but are not directly connected through the role hierarchy.

## **Phase 5: Deployment, Documentation & Maintenance**

### **Deployment Strategy for HandsMen Threads**

For HandsMen Threads, the deployment strategy will use a combination of Change Sets, Salesforce DX, and ANT Migration Tool to ensure smooth, efficient, and reliable deployments across environments. For more complex deployments involving custom code or integrations, Salesforce DX will be used, leveraging version control (Git) and automation to manage metadata, deploy updates, and enable continuous integration.

### **System Maintenance and Monitoring**

The system will be actively maintained and monitored using Salesforce's built-in tools and scheduled processes. Regular updates will be applied through sandbox testing to ensure minimal disruption in production. Salesforce Health Check will be used to assess the security posture of the system, while System Overview and Apex Exception Emails will monitor performance and errors.

### **Troubleshooting Approach**

The troubleshooting approach will follow a structured process, beginning with identifying and replicating the issue in a controlled environment. Key tools like Apex Debug Logs and Error Emails will be used to investigate issues with custom code or automation. System Logs and Event Monitoring will help diagnose performance or system-related issues. If the issue is related to user permissions or configurations, a review of profiles, field-level security, and sharing settings will be conducted. For issues that cannot be resolved internally, Salesforce Support or a certified consultant will be engaged. All steps, logs, and findings will be documented for future reference, ensuring efficient resolution and continuous improvement.

### **Conclusion**

For HandsMen Threads, the ability to customize Salesforce to meet specific business needs is key to enhancing efficiency and improving the overall user experience. With tools like App Manager, Page Layouts, and Lightning Pages, HandsMen can tailor their Salesforce environment to align with their unique workflows, product catalogs, and customer engagement strategies. Whether it's creating custom apps for the Sales or Inventory teams, designing dynamic record pages with product details and customer histories, or offering personalized dashboards to monitor stock levels and sales performance, Salesforce provides the flexibility to ensure that the right tools are always available to the right teams. These features not only make the system more intuitive but also help reduce manual tasks, empowering teams to focus on high-value activities and improving productivity.

Additionally, effective User Management and robust Reports and Dashboards capabilities will ensure that HandsMen can control access to sensitive business data while providing actionable insights for decision-making. By managing who can view and edit customer data, orders, and inventory, HandsMen can safeguard important information while ensuring that the right people have the access they need. Customizable Reports and Dashboards will allow teams to track key metrics such as sales performance, customer loyalty, and stock levels in real-time, helping them stay ahead of business needs. In short, Salesforce's customization options, combined with powerful data management and reporting tools, create a unified platform that enables HandsMen Threads to streamline operations, improve customer relationships, and make informed, data-driven decisions to drive growth.