

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.

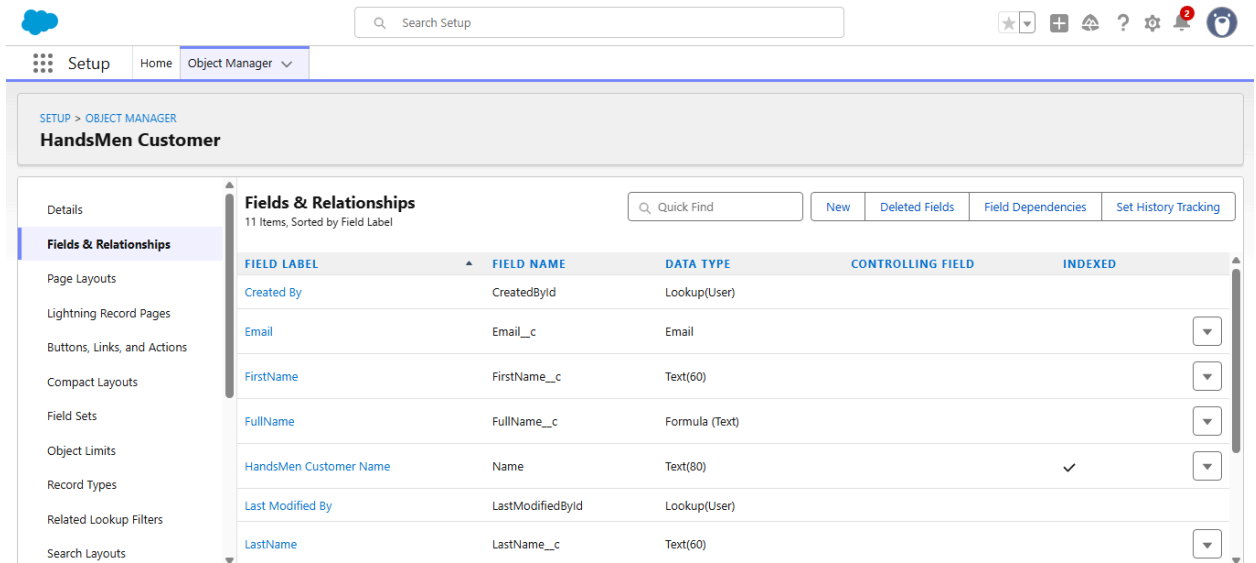
1.2. Project Scope

- 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.

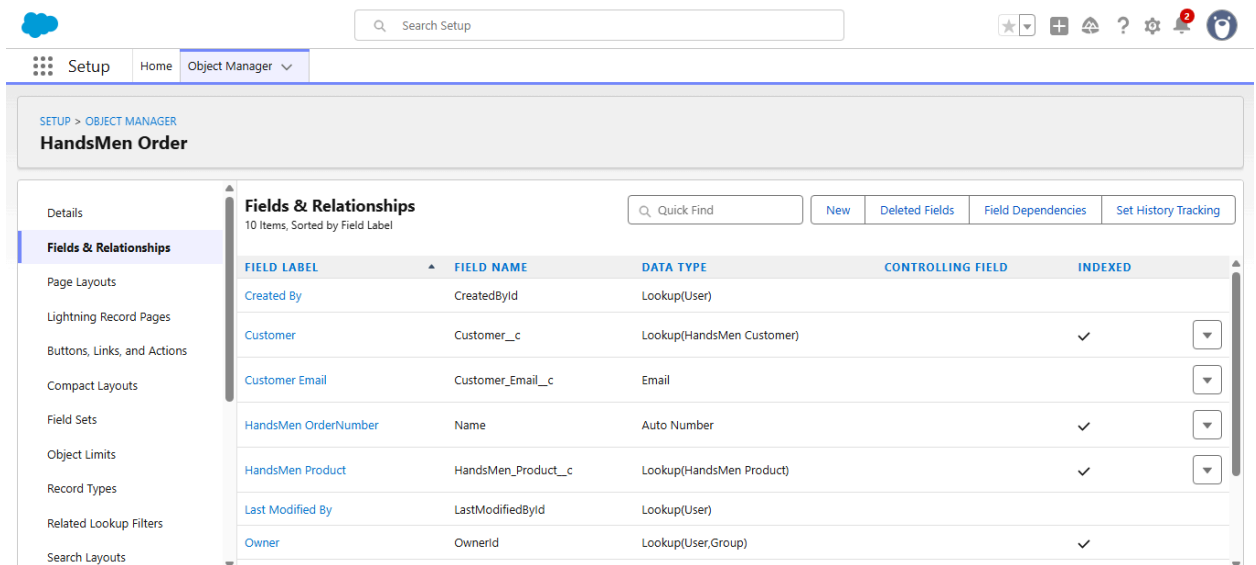


The screenshot shows the Salesforce Setup interface for the 'HandsMen Customer' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'HandsMen Customer' and 'Fields & Relationships', showing 11 items sorted by Field Label. A table lists the fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	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	LastModifiedById	Lookup(User)		
LastName	LastName__c	Text(50)		

- **HandsMen Orders**

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

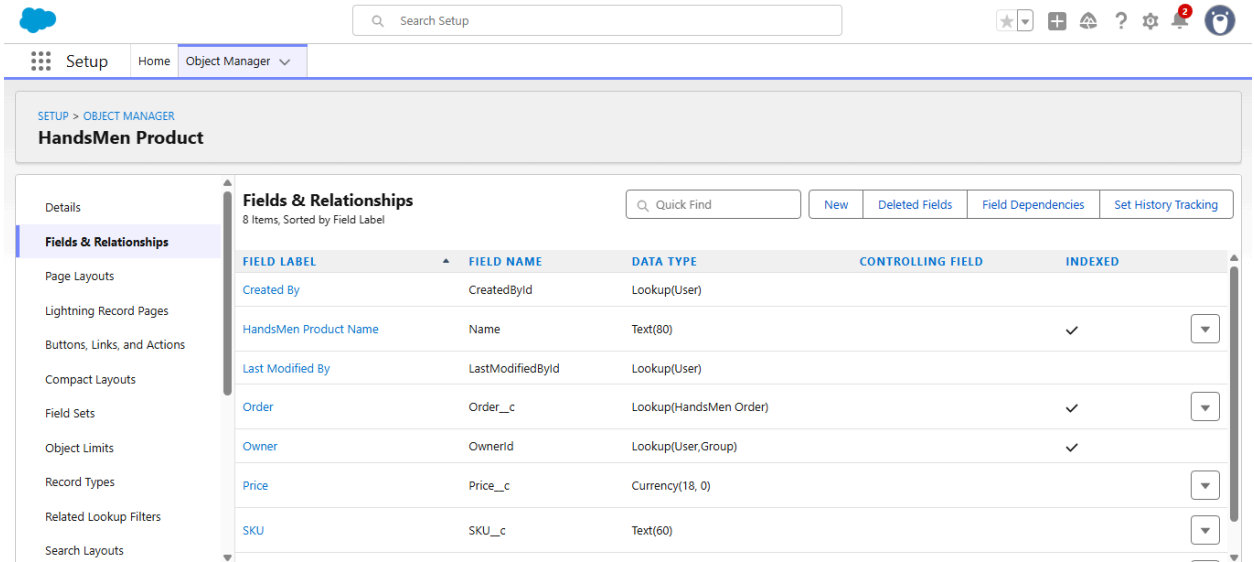


The screenshot shows the Salesforce Setup interface for the 'HandsMen Order' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'HandsMen Order' and 'Fields & Relationships', showing 10 items sorted by Field Label. A table lists the fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	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	LastModifiedById	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.

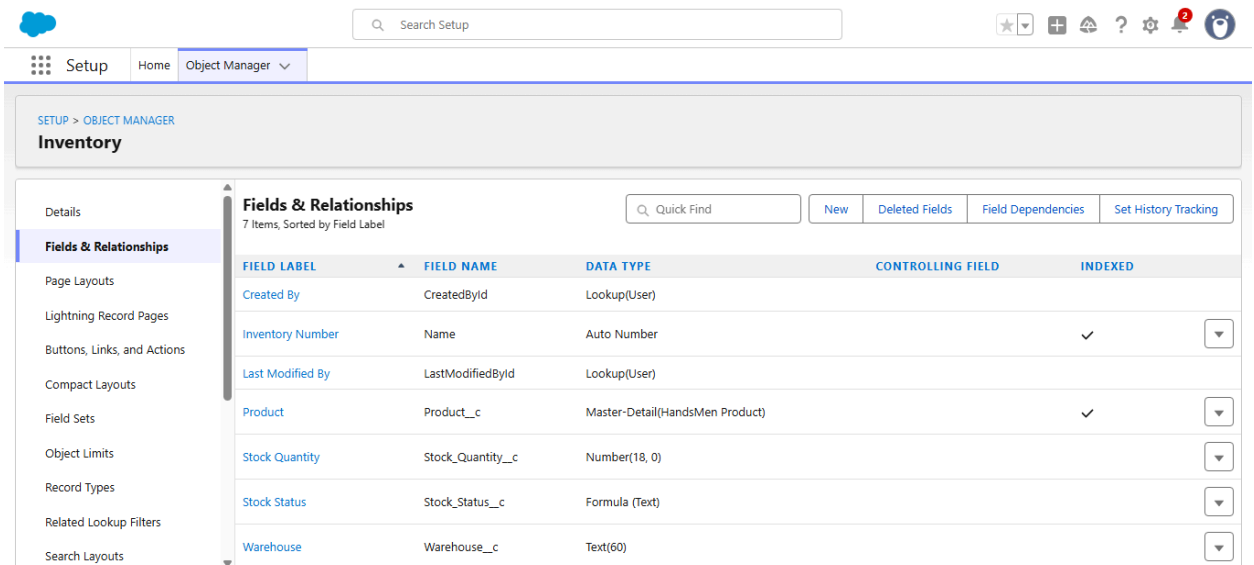


The screenshot shows the Salesforce Setup interface for the 'HandsMen Product' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'HandsMen Product' and shows the 'Fields & Relationships' section with 8 items, sorted by Field Label. A table lists the fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Created By, HandsMen Product Name, Last Modified By, Order, Owner, Price, and SKU.

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 Setup interface for the 'Inventory' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Inventory' and shows the 'Fields & Relationships' section with 7 items, sorted by Field Label. A table lists the fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Created By, Inventory Number, Last Modified By, Product, Stock Quantity, Stock Status, and Warehouse.

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.

The screenshot displays the Salesforce Object Manager for the "Marketing Campaign" object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

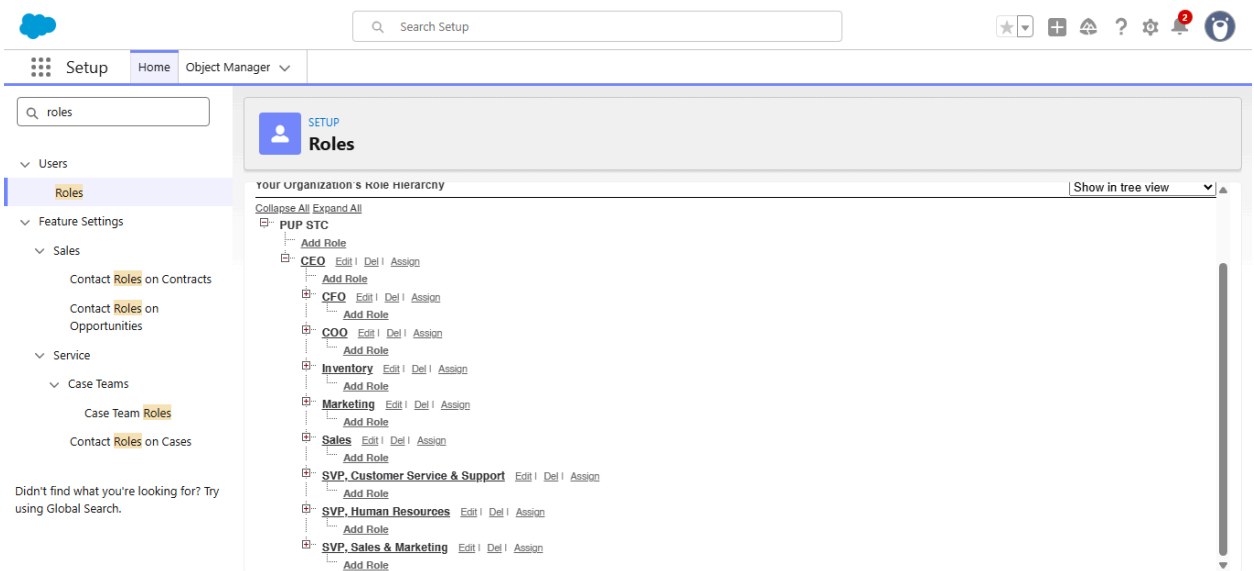
The main area shows the "Fields & Relationships" section for the Marketing Campaign object, indicating 7 items sorted by field label. A search bar labeled "Quick Find" is present. Below are tabs for "New", "Deleted Fields", "Field Dependencies", and "Set History Tracking".

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date/Time		<input type="checkbox"/>
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		<input checked="" type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		
Marketing Campaign Number	Name	Auto Number		<input checked="" type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Start Date	Start_Date__c	Date/Time		<input type="checkbox"/>

1.4. Security Model

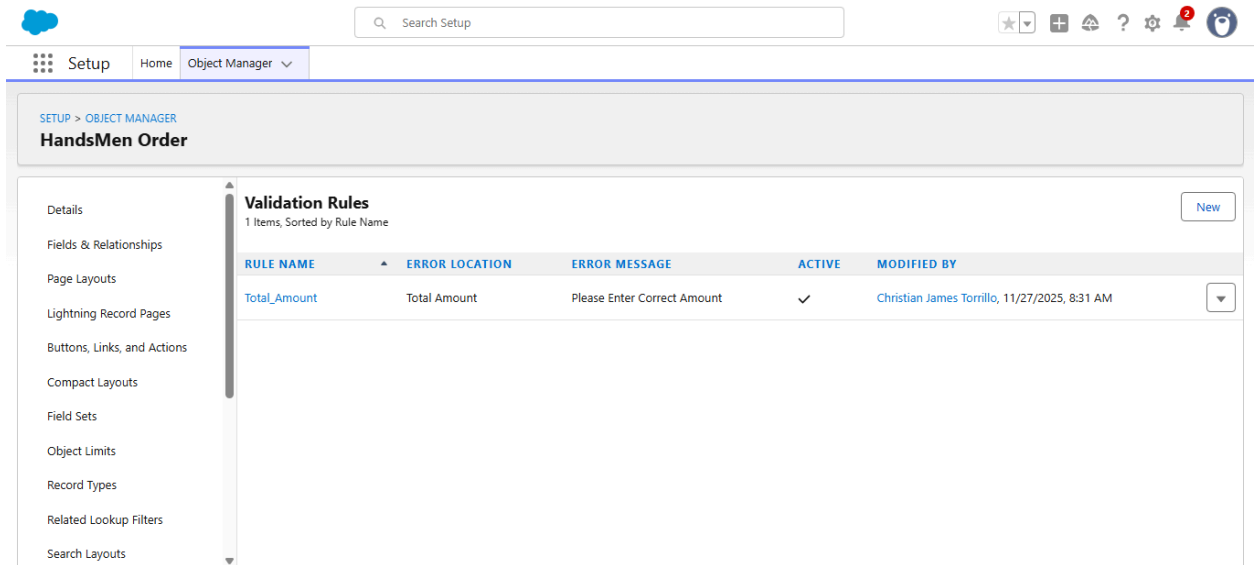
- **Profiles and Roles**

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.



- **Validation Rules**

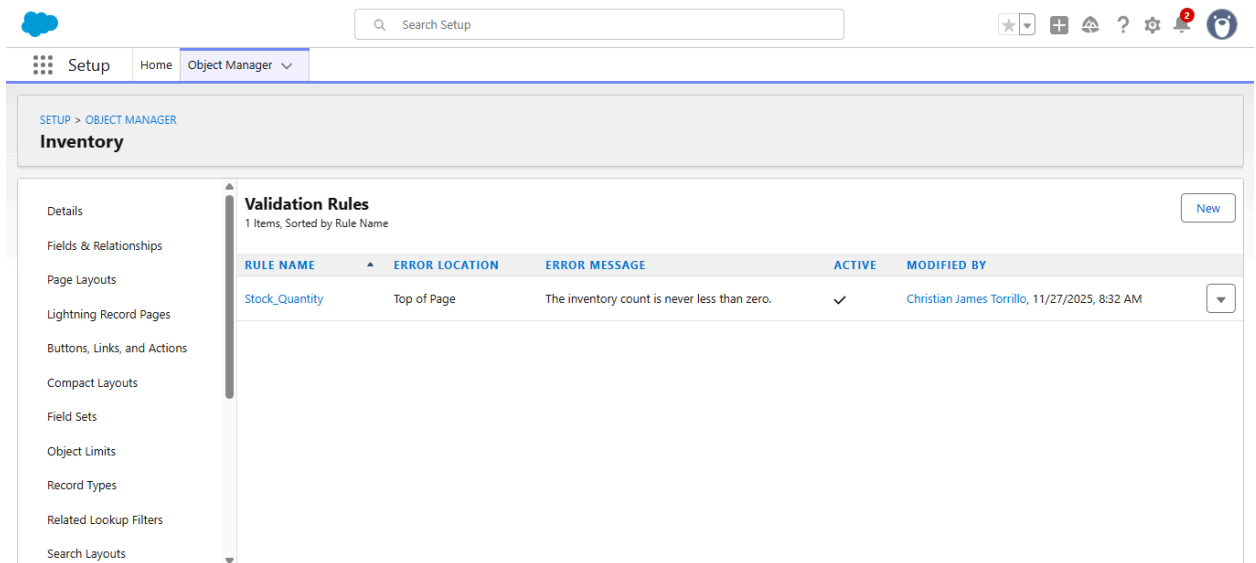
Validation rules are used to ensure that the data entered into Salesforce meets specific criteria before it is saved.



The screenshot shows the Salesforce Setup interface for the 'HandsMen Order' object. The left sidebar lists various setup options, with 'Validation Rules' selected. The main content area displays a table of validation rules for this object. There is one rule named 'Total_Amount' which is active and was modified by Christian James Torrillo on 11/27/2025 at 8:31 AM. The rule's error location is 'Total Amount' and the error message is 'Please Enter Correct Amount'.

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 for the 'Inventory' object. The left sidebar lists various setup options, with 'Validation Rules' selected. The main content area displays a table of validation rules for this object. There is one rule named 'Stock_Quantity' which is active and was modified by Christian James Torrillo on 11/27/2025 at 8:32 AM. The rule's error location is 'Top of Page' and the error message is 'The inventory count is never less than zero.'

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.

SetupHomeObject Manager

SEARCH SETUP

NEW

HELP

NOTIFICATIONS

PROFILE

SETUP > OBJECT MANAGER

HandsMen Customer

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch Layouts

Validation Rules

1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email	Top of Page	Please fill Correct Gmail	✓	Christian James Torrillo, 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.

SetupHomeObject Manager

SEARCH SETUP

NEW

HELP

NOTIFICATIONS

PROFILE

users

Users

Permission Set GroupsPermission SetsProfilesPublic GroupsQueuesRolesUser Management SettingsUsersFeature SettingsData.comProspectorUsers

Didn't find what you're looking for? Try using Global Search.

SETUP

Users

User ProfileHelp for this Page

Niklaus Mikaelson

Permission Set Assignments (1) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Built-in Authenticators (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail

EditSharingReset PasswordFreezeView Summary

Name	Niklaus Mikaelson	Role	Sales
Alias	nmika	User License	Salesforce
Email	q29070@gmail.com [Verify]	Profile	Platform 1
Username	q29070916@gmail.com	Active	✓
Nickname	User17642617936548707235	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>

- **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. The left sidebar has a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (highlighted), Feature Settings, Data.com, and Prospector Users. The main content area is titled 'Users' and shows the profile for 'User Kol Mikaelson'. At the top, there are links for 'Permission Set Assignments', 'Activation Required', 'Permission Set Group Assignments', 'Permission Set License Assignments', 'Personal Groups', 'Public Group Membership', 'Queue Membership', 'Team', 'Managers in the Role Hierarchy', 'OAuth Apps', 'Third-Party Account Links', 'Built-in Authenticators', 'Installed Mobile Apps', 'Authentication Settings for External Systems', 'Login History', and 'User Provisioning Accounts'. Below these links are buttons for 'Edit', 'Sharing', 'Reset Password', 'Freeze', and 'View Summary'. The 'User Detail' section contains a table with the following information:

Name	Kol Mikaelson	Role	Inventory
Alias	kmika	User License	Salesforce
Email	cj29070@gmail.com [Verify]	Profile	Platform 1
Username	cj29070917@gmail.com	Active	<input type="checkbox"/>
Nickname	User17642618533121860766	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>

- **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 for the 'Users' section. It displays the user profile for 'Kol Mikaelson' with various settings and role assignments. The left sidebar navigation is the same, and the main content area shows the same user details and role configuration table.

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

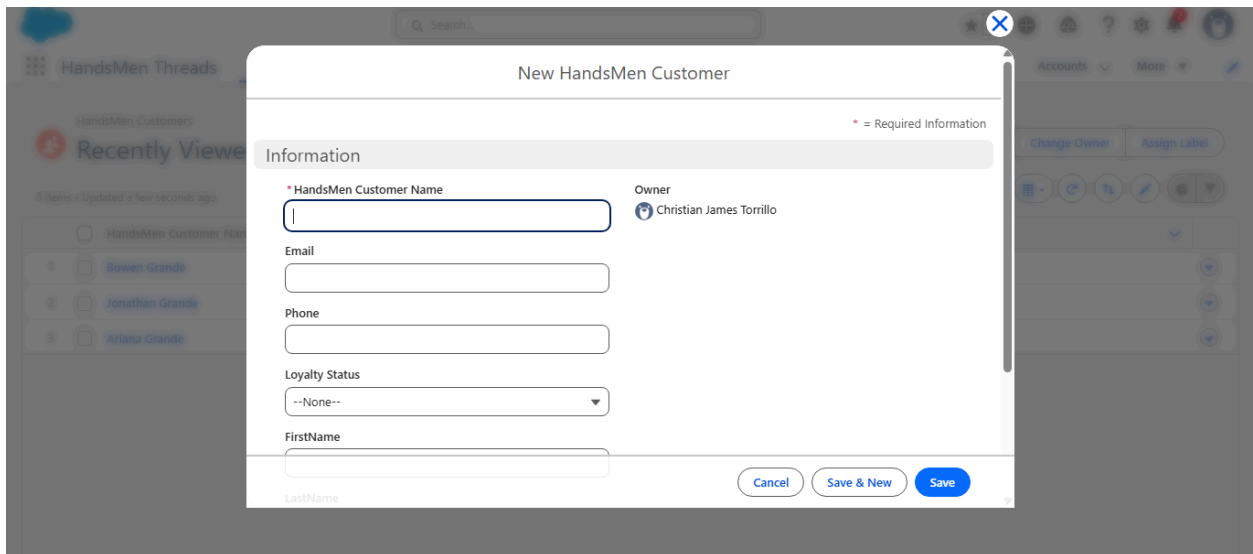
- Deploy to production.
- Train users on new functionality.
- Post-go-live support and monitoring

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.



The screenshot shows a Salesforce interface with a modal window titled "New HandsMen Customer". The modal is set against a background of the Salesforce "HandsMen Threads" page, which includes a "Recently Viewed" list with items like "HandsMen Customer Name", "Bowen Grande", "Jonathan Grande", and "Arlana Grande".

The modal form has a title bar with a close button (X) and a search bar. Below the title, it says "New HandsMen Customer". A legend indicates that a red asterisk (*) denotes required information.

The form is divided into sections. The "Information" section contains the following fields:

- * HandsMen Customer Name**: A text input field with a cursor.
- Owner**: A dropdown menu showing "Christian James Torrillo".
- Email**: A text input field.
- Phone**: A text input field.
- Loyalty Status**: A picklist dropdown menu with "--None--" selected.
- FirstName**: A text input field.
- LastName**: A text input field.

At the bottom right of the modal, there are three buttons: "Cancel", "Save & New", and "Save".

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.

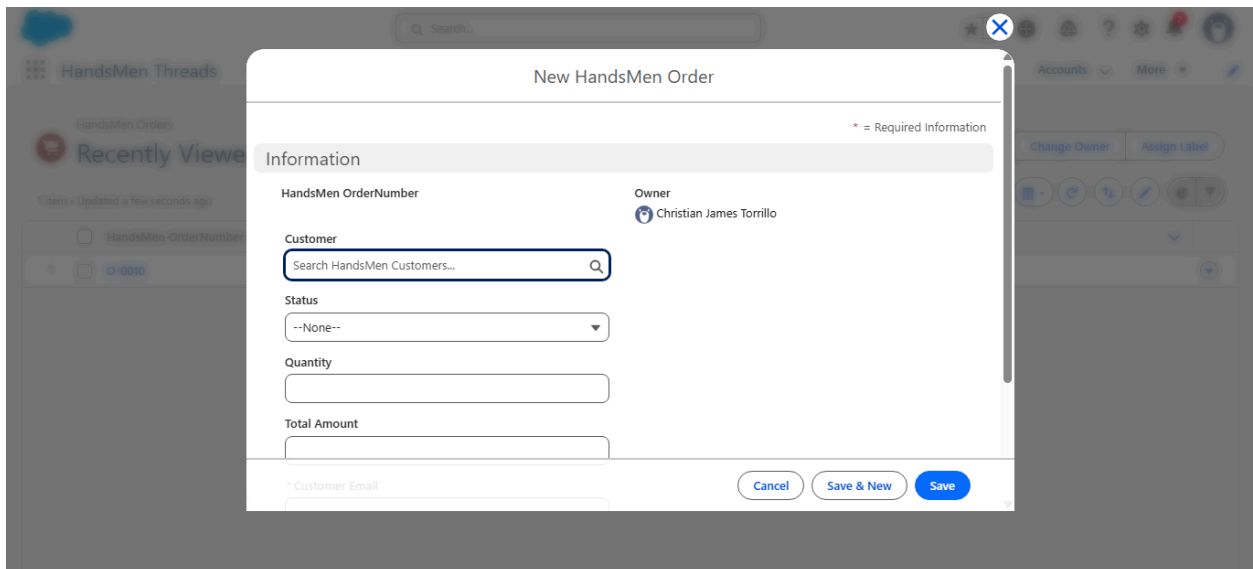
The screenshot shows a Salesforce interface with a modal window titled "New HandsMen Order". The modal has a close button (X) in the top right corner. Below the title bar, there is a tab labeled "Information" and a note "* = Required Information". The form contains the following fields:

- HandsMen OrderNumber**: A text field.
- Owner**: A dropdown menu showing "Christian James Torrillo" with a user icon.
- Customer**: A search field with the placeholder text "Search HandsMen Customers..." and a magnifying glass icon.
- Status**: A dropdown menu with "--None--" selected.
- Quantity**: A text field.
- Total Amount**: A text field.

At the bottom of the modal, there is a section for "* Customer Email" with a text field. To the right of this section are three buttons: "Cancel", "Save & New", and "Save". The background shows a blurred view of the Salesforce interface with the "HandsMen Threads" logo and a "Recently Viewed" section.

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).



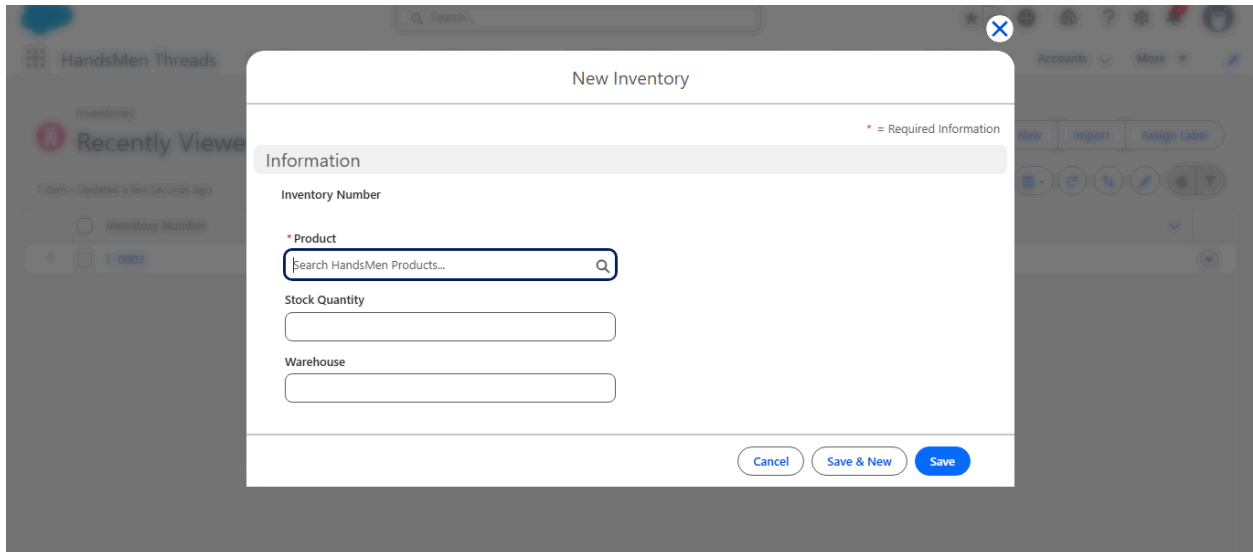
The screenshot shows a Salesforce interface with a modal window titled "New HandsMen Order". The modal is divided into sections. The "Information" section contains the following fields:

- HandsMen OrderNumber**: A text field for the unique identifier.
- Owner**: A picklist showing "Christian James Torrillo" with a user icon.
- Customer**: A search field with the placeholder text "Search HandsMen Customers..." and a magnifying glass icon.
- Status**: A picklist with "--None--" selected.
- Quantity**: A text input field.
- Total Amount**: A text input field.

At the bottom of the modal, there is a section for "Customer Email" with a text input field. To the right of this section are three buttons: "Cancel", "Save & New", and "Save". A red asterisk icon with the text "= Required Information" is located in the top right corner of the modal.

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 'New Inventory' modal form. At the top, it says 'New Inventory' and 'Information'. Below this, there's a section for 'Inventory Number' which is auto-generated. The 'Product' field is a search bar with the placeholder text 'Search HandsMen Products...'. The 'Stock Quantity' field is a text input. The 'Warehouse' field is a text input. At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'. A legend indicates that an asterisk (*) denotes required information.

HandsMen Threads

Recently Viewed

Inventory Number

1-0000

New Inventory

Information

* = Required Information

Inventory Number

* Product

Search HandsMen Products...

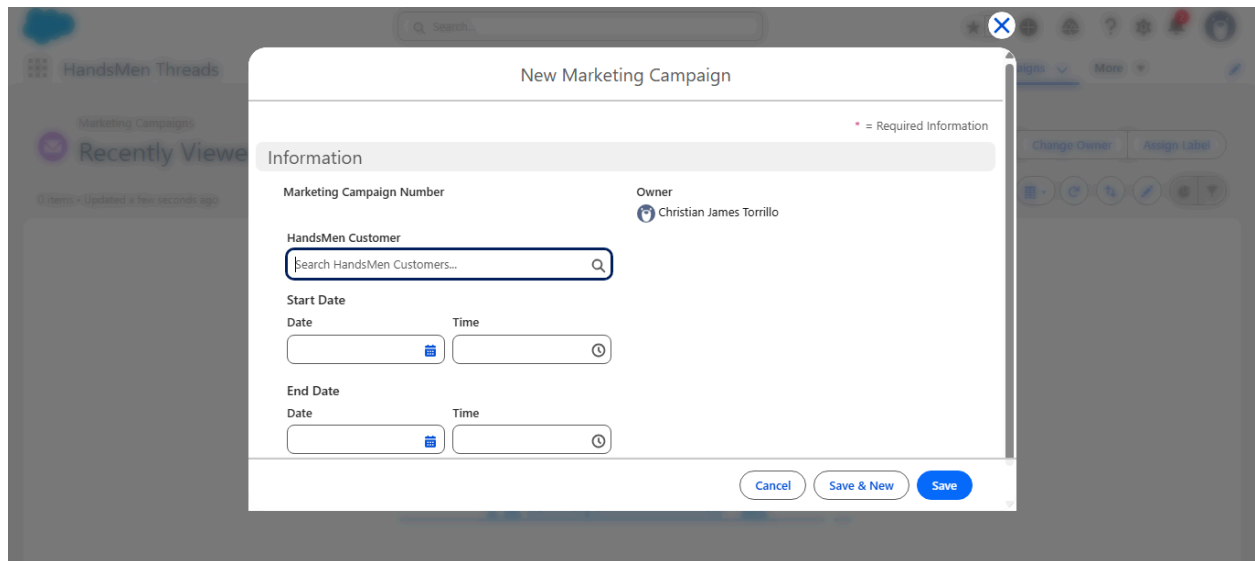
Stock Quantity

Warehouse

Cancel Save & New Save

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.

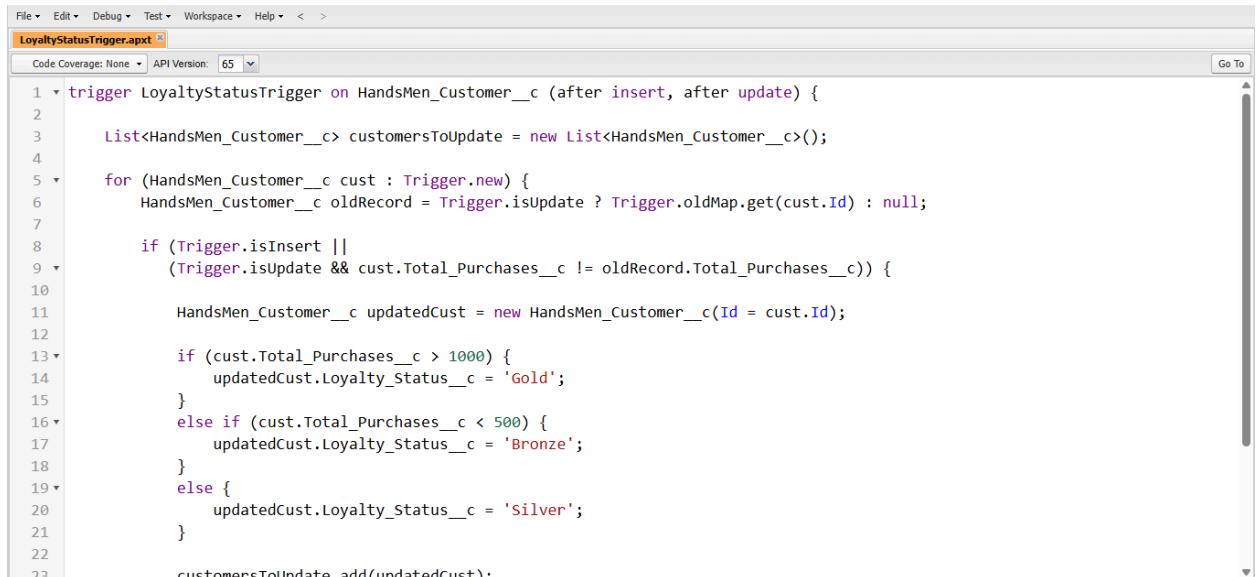


The screenshot shows a 'New Marketing Campaign' form. The form is titled 'New Marketing Campaign' and includes a close button (X) in the top right corner. A legend indicates that a red asterisk (*) denotes required information. The form is divided into sections: 'Information' (which is currently selected), 'Marketing Campaign Number', 'Owner' (set to Christian James Torillo), 'HandsMen Customer' (with a search bar labeled 'Search HandsMen Customers...'), 'Start Date' (with separate fields for Date and Time), and 'End Date' (also with separate fields for Date and Time). At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The background shows a blurred view of the 'HandsMen Threads' page with a 'Recently Viewed' section.

2.2. Apex Classes, Triggers, Asynchronous Apex Classes

1. Update Order Total

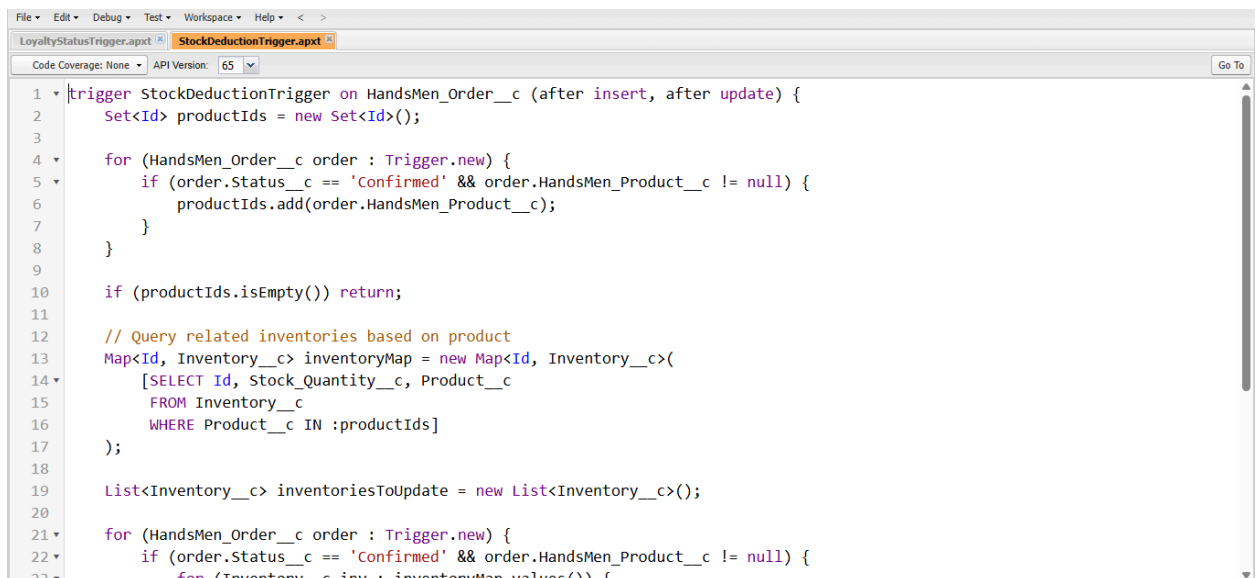
- Automatically updates the **Total_Amount__c** field on the order based on the price of the product and quantity of the order.



```
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 }
```

2. Stock Deduction

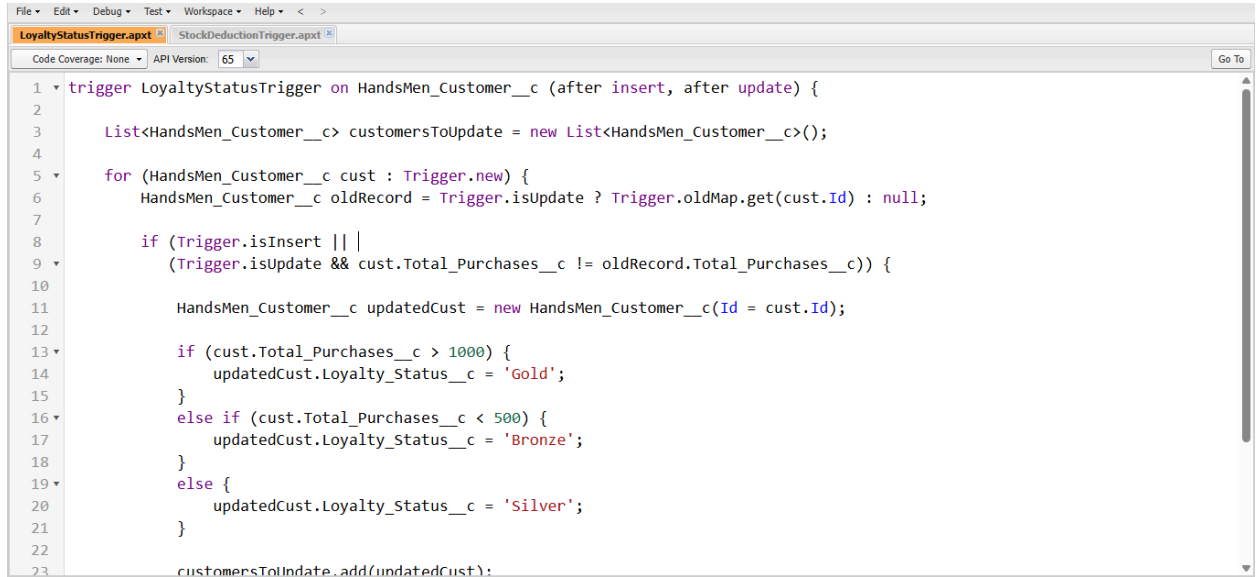
- Reduces the available stock quantity in the **Inventory__c** object whenever an order is placed and confirmed, ensuring accurate inventory tracking.



```
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()) {
24                inv.Stock_Quantity__c -= order.Quantity__c;
25            }
26        }
27    }
28 }
```

3. Loyalty Status Update

- Automatically upgrades a customer's **Loyalty_Status__c** based on the all-time value of their purchases.



```
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     }
```

Phase 3: UI/UX Development & Customization

3.1. Lightning App setup through App Manager


The screenshot shows the Salesforce Lightning App Manager interface. At the top, there's a search bar and navigation tabs for 'HandsMen Threads', 'HandsMen Customers' (selected), 'HandsMen Orders', 'HandsMen Products', 'Inventories', 'Reports', 'Dashboards', 'Accounts', and 'More'. Below the tabs, the 'HandsMen Customers' app is displayed. It has a 'Recently Viewed' section with a list of 3 items: 'Bowen Grande', 'Jonathan Grande', and 'Ariana Grande'. The interface includes buttons for 'New', 'Import', 'Change Owner', and 'Assign Label', and a search bar for the list.

3.2. User Management








The screenshot shows the Salesforce Setup page for User Management. The left sidebar contains a navigation menu with 'Users' selected. The main content area is titled 'All Users' and includes a description: 'On this page you can create, view, and manage users. To get more licenses, use the Your Account app. Let's Go'. Below this, there's a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Chatter Expert', 'EPIC_OroFarm', 'James_Christian', 'Mikaelson_Kol', 'Mikaelson_Niklaus', 'Torillo_ChristianJames', 'User_Integration', and 'User_Security'. The interface also includes buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatv_00d00000fsu7xuav.q5mfokh3uvoc@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OroFarm	OEPIG	epic.a88978c08db5@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	James_Christian	cjame	ci290700919@gmail.com	Marketing	✓	Platform 1
<input type="checkbox"/> Edit	Mikaelson_Kol	kmika	ci29070917@gmail.com	Inventory	✓	Platform 1
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	ci29070916@gmail.com	Sales	✓	Platform 1
<input type="checkbox"/> Edit	Torillo_ChristianJames	tor	torillo.christianjames662@agenforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d00000fsu7xuav.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00d00000fsu7xuav.com		✓	Analytics Cloud Security User

3.3. Reports and Dashboards



Q Search...



HandsMen ThreadsHandsMen CustomersHandsMen OrdersHandsMen ProductsInventoriesReportsDashboardsAccountsMore

Reports


Recent

2 items

Q Search recent reports...

New Report

New Folder



REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS



All Folders


Created by Me

Shared with Me








FAVORITES

All Favorites

Report Name	Description	Folder	Created By	Created On	Subscribed
New HandsMen Products Report		Private Reports	Christian James Torrillo	11/28/2025, 2:41 AM	
HandsMen Orders Report		Private Reports	Christian James Torrillo	11/28/2025, 2:38 AM	



Q Search...



HandsMen ThreadsHandsMen CustomersHandsMen OrdersHandsMen ProductsInventoriesReportsDashboardsAccountsMore

Dashboard

Orders


As of Nov 28, 2025, 2:43 AM

Viewing as Christian James Torrillo



Refresh

Edit

Subscribe



HandsMen Orders Report





HandsMen Order: HandsMen OrderNu...	Custo...	HandsMen ...
O-0001	Ariana Grande	Hoodie
O-0002	Ariana Grande	-
O-0003	Ariana Grande	Hoodie
O-0004	Ariana Grande	Hoodie
O-0005	Ariana Grande	Hoodie

View Report (HandsMen Orders Rep...)

As of Nov 28, 2025, 2:43 AM

New HandsMen Products Report



HandsMen Product: HandsMen Product Name ↑	Price
Hoodie	\$500

View Report (New HandsMen Produ...)

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.