

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

A Written Report Submitted in Partial Fulfillment of the Requirements for the Salesforce Internship (Smartbridge) and IT Elective 4 course

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## OVERVIEW

HandsMen Threads, an organization in the fashion industry, is taking its initiative to improve their business processes and customer relationship by utilizing the power of Salesforce. This project presents the implementation of a customized Salesforce CRM solution for HandsMen Threads.

The project focuses on developing solutions that involves designing and implementing a comprehensive data model capable of storing and managing all crucial objects: Orders, Customers, Products, Inventory, and Marketing Campaign. Additionally, beyond data structuring, business processes were also utilizing automation using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex to handle order confirmations, loyalty status updates, and proactive stock alerts.

To ensure the reliability and integrity of data, validation rules were established, and a role-based security model was implemented for the Sales, Inventory, and Marketing teams. This is to ensure that only validated data will be recorded and only those authorized entity will be able to perform operations. The solution also includes a scheduled batch job using Apex to update low stock quantities.

Overall, this end-to-end CRM implementation aims at improving customer experience by developing a unified and customer-centric Salesforce platform that supports HandsMen Thread's business processes.

## OBJECTIVE

### General Objective

The main objective of this project is to develop and implement a customized Salesforce CRM platform for HandsMen Threads to improve data integrity, and automate key business processes to enhance customer engagement and operations.

### Specific Objectives

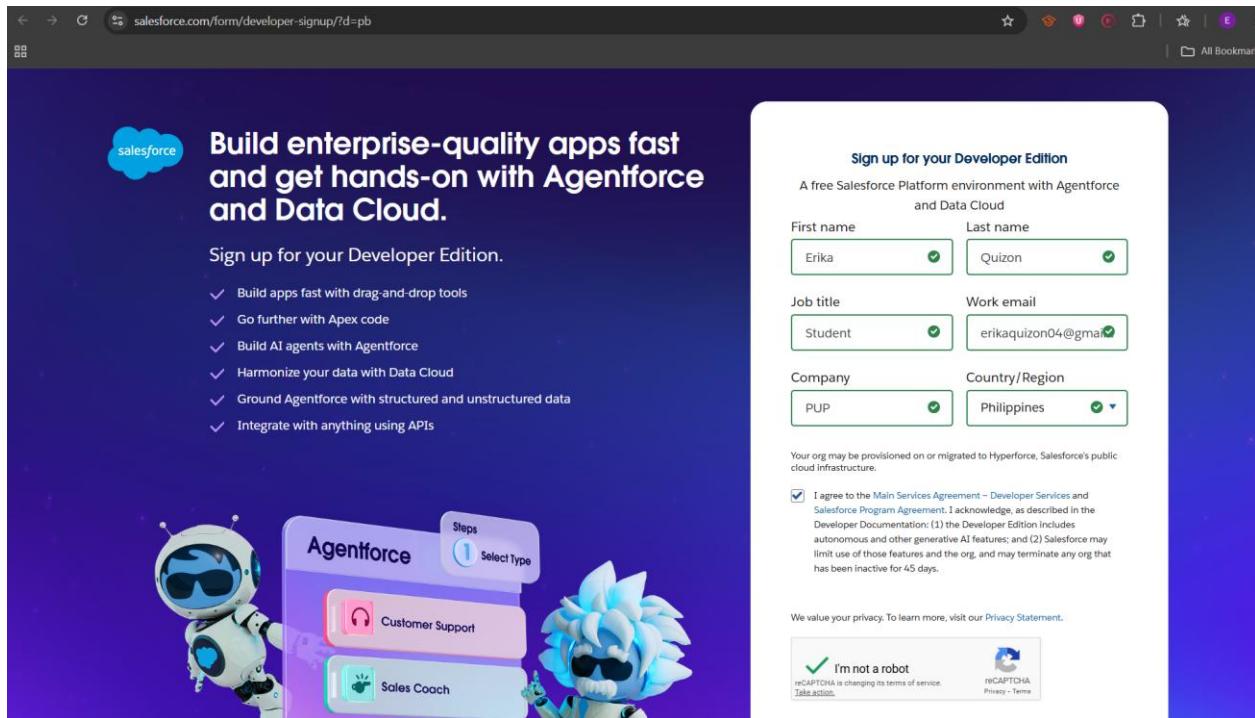
Specifically, by building a centralized system to manage customers, orders, products, inventory, and marketing campaigns, the project aims to:

1. Design and implement a scalable Salesforce data model that supports all relevant business entities, relationships, and workflows;
2. Ensure accurate and consistent data entry using validation rules.
3. Automate key processes using Record-Triggered Flows and Scheduled Flows, including order confirmation, loyalty status updates, and stock alerts.
4. Develop Apex classes and triggers to address advanced business logic.
5. Improve customer satisfaction and engagement through timely communication and a dynamic loyalty system.
6. Improve internal team coordination through role-based access control.

## EXECUTION OF PROJECT PHASES

### 1. Developer Org Setup

- A Salesforce Developer Org was created using <https://developer.salesforce.com/signup>.
- After submission, the verification email was received, the account was activated, and the password was set.
- Upon activation, access was granted to the Salesforce Setup Home page.



### 2. Custom Object Creation

Five custom objects were created to store business-critical data:

Custom Object	Purpose
<b>HandsMen Customer</b>	Stores customer data such as name, email, phone, and loyalty status.
<b>HandsMen Product</b>	Stores product catalog details like price, SKU.
<b>HandsMen Order</b>	Stores order information such as customer, quantity, and order status.
<b>Inventory</b>	Tracks product stock levels and warehouse information.
<b>Marketing Campaign</b>	Stores promotional campaign details and marketing activities.

Steps to Create Custom Object:

- Navigated to Setup → Object Manager → Create → Custom Object

- Provided label, name, and enabled reports/search
- Saved and created Tabs for each object

The screenshot shows the Salesforce Setup Object Manager interface. At the top, there's a search bar with 'Hands' typed into it, and buttons for 'Schema Builder' and 'Create'. Below the header, there's a table listing three custom objects:

Label	API Name	Type	Description	Last Modified
HandsMen Customer	HandsMen_Customer__c	Custom Object		11/19/2025
HandsMen Order	HandsMen_Order__c	Custom Object		11/19/2025
HandsMen Product	HandsMen_Product__c	Custom Object		11/19/2025

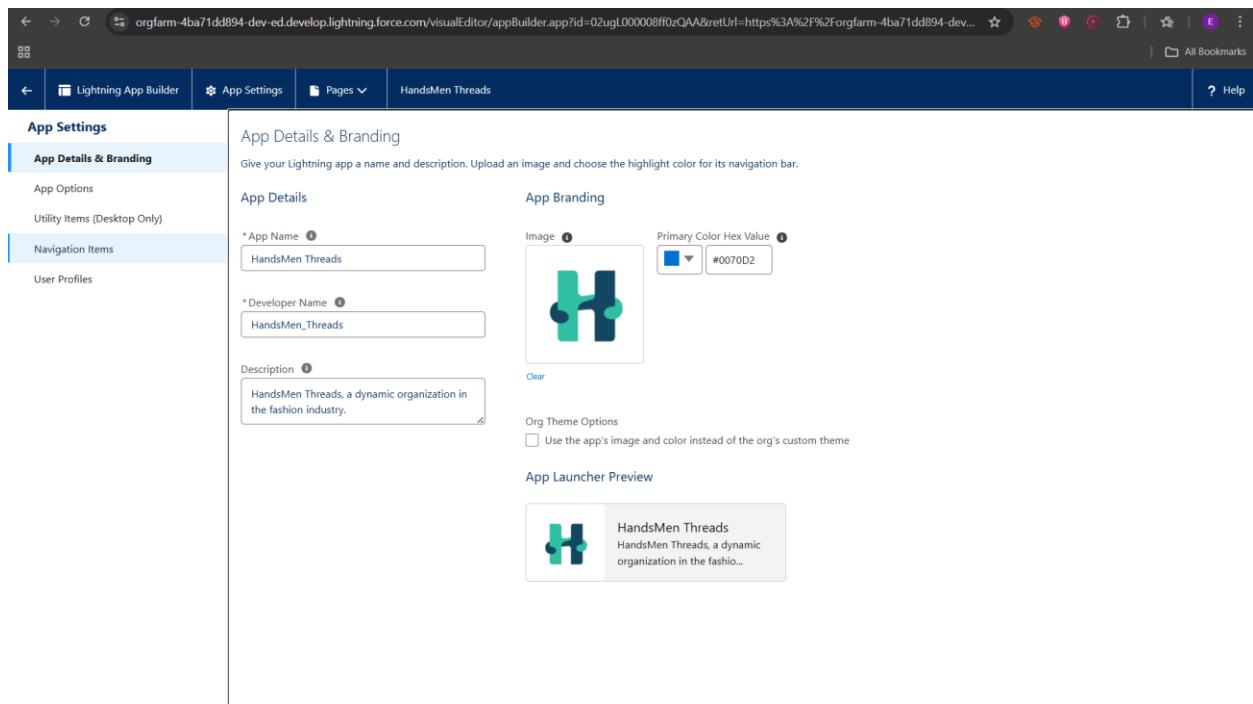
#### Steps to Add Tabs for each Custom Object:

- Go to Setup → Quick Find → Tabs
- Under Custom Object Tabs, click New
- Select Custom Objects
- Choose any Tab Style
- On "Add to Profiles" page → Keep default settings → Next
- On "Add to Custom Apps" page → Keep default settings → Save

The screenshot shows the Salesforce Lightning App navigation bar. The 'HandsMen Threads' tab is active. Other tabs visible include 'HandsMen Customer' (selected), 'HandsMen Orders', 'Inventory', 'HandsMen Products', 'Reports', 'Dashboards', 'Accounts', 'Contacts', and 'Marketing Campaigns'.

### 3. Creating the Lightning App

- A custom Lightning App named HandsMen Threads was created.
- Included tabs: HandsMen Customer, Order, Product, Inventory, Campaign, Reports, etc.
- Assigned to the System Administrator profile.



## 4. Validation Rules

Validation rules were added to maintain data accuracy and enforce business constraints.

### HandsMen Order Object

- **Rule:** Prevent saving if Total\_Amount\_\_c <= 0
- **Error Message:** “Please Enter Correct Amount”

### HandsMen Customer Object

- **Rule:** Email must contain "@gmail.com"
- **Error Message:** “Please fill Correct Gmail”

### Inventory Object

- **Rule:** Stock\_Quantity\_\_c must be greater than 0

The screenshot shows the Salesforce Setup interface under the Object Manager. A validation rule named "Discount\_Percent\_c > 0.30" is being created. The formula is defined as "Discount\_Percent\_c > 0.30". A dropdown menu for functions is open, showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. The "Error Condition Formula" section includes examples and a help link for operators and functions.

## 5. User Role & Profile Setup

Roles and profiles were configured to manage system-level permissions:

- Created a custom profile Platform 1 based on Standard User
- Created the following roles reporting to CEO:
  - Sales Manager, Inventory Manager, Marketing Manager

The screenshot shows the Salesforce Setup interface under the Roles tab. It displays a role hierarchy starting from the CEO role at the top, which branches down through CFO, COO, Inventory, Marketing, Sales, and several support roles like SVP Customer Service & Support and Customer Support International. Each role has edit, delete, and assign permissions listed below it.

## 6. User Creation

Users were creating in Salesforce and assigned appropriate roles and profiles to reflect their responsibilities:

- Niklaus Mikaelson - Sales Role + Platform 1 Profile
- Kol Mikaelson - Inventory Role + Platform 1 Profile
- Martin Lee - Marketing Role + Platform 1 Profile
- These role-based assignments help enforce proper data access and process control within the system

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar is collapsed, and the main area displays a list of users under the heading 'All Users'. The user list includes columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. Several users are highlighted with yellow boxes, specifically 'Lee\_Martin' (Marketing), 'Mikaelson\_Kol' (Inventory), and 'Mikaelson\_Niklaus' (Sales). The 'Profile' column for these users shows 'Platform\_1' selected. Other users listed include 'Chatter\_Expert', 'EPIC\_OrgFarm', 'Quizon\_Erika', 'User\_Integration', and 'User\_Security'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty_000g00000talexuat.cyjtb24do1a@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	EPIC_OrgFarm	OEPIIC	epic_23ccbdb7f756@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Lee_Martin	mlee	martin@ouo.com	Marketing	<input checked="" type="checkbox"/>	Platform_1
<input type="checkbox"/>	Mikaelson_Kol	kmika	kol@ouo.com	Inventory	<input checked="" type="checkbox"/>	Platform_1
<input type="checkbox"/>	Mikaelson_Niklaus	nmikla	niklaus@ouo.com	Sales	<input type="checkbox"/>	Platform_1
<input type="checkbox"/>	Quizon_Erika	eri	eriquizon0443@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00dg00000talexuat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@000g00000talexuat.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## 7. Email Template & Alerts

Created three email templates:

- Order Confirmation - Sent on order status = Confirmed
- Low Stock Alert - Sent when Inventory < 5 units
- Loyalty Program Email - Sent when loyalty status changes

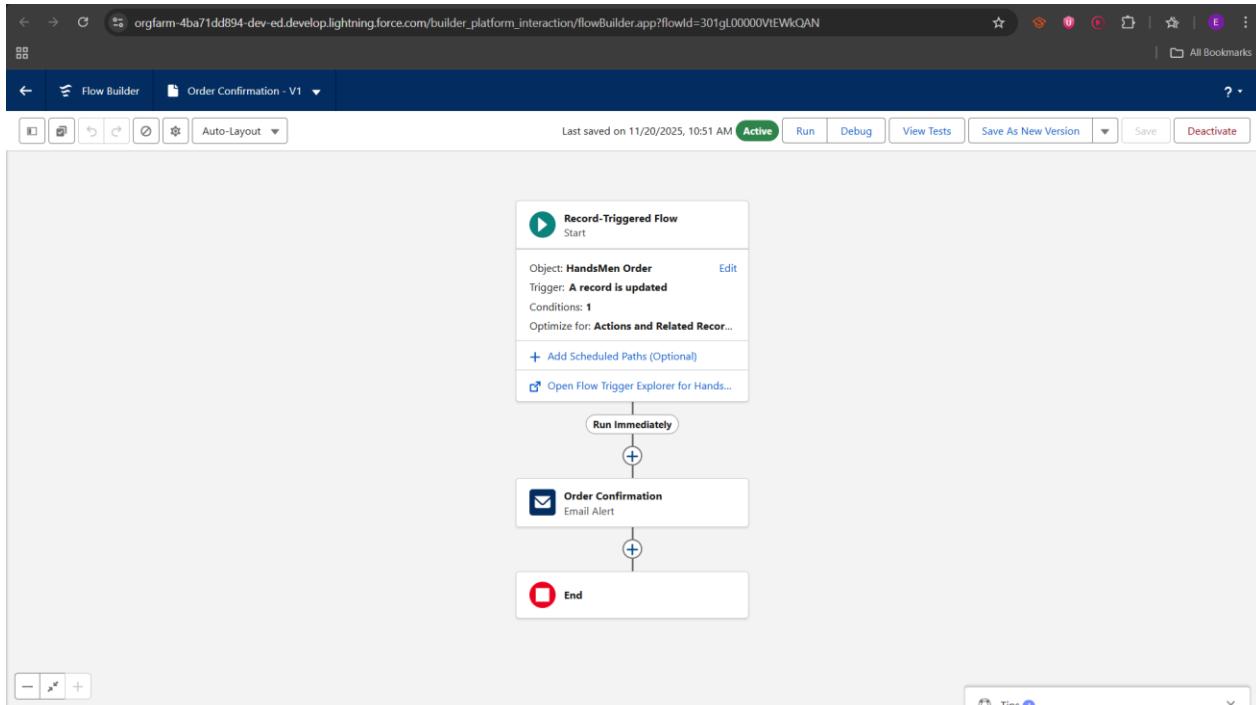
Email Alerts were configured and linked to automation flows.

Classic Email Templates						
Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit   Del	Appointment for Unauthenticated User using Appointment Types - For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon Chime.	sfdcadmin	11/13/2025
Edit   Del	Appointment for Unauthenticated User using Appointment Types - For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with third party video applications.	sfdcadmin	11/13/2025
Edit   Del	Appointment for Unauthenticated User using Engagement Channels-For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon Chime.	sfdcadmin	11/13/2025
Edit   Del	Appointment for Unauthenticated User using Engagement Channels-For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications.	sfdcadmin	11/13/2025
Edit   Del	Canceled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm canceling of a service appointment.	sfdcadmin	11/13/2025
Edit   Del	Commerce Reorder Portal_ Invitation	Custom	✓	Invite a contact to a Commerce Reorder Portal.	autoproc	11/13/2025
Edit   Del	Group Service Appointments Enrollment Confirmation Email	Custom	✓	Email Template to confirm enrollment of an attendee to a Group service appointment.	sfdcadmin	11/13/2025
Edit   Del	Low Stock Alert	Text	✓		edi	11/19/2025
Edit   Del	Loyalty Program Email	HTML	✓		edi	11/19/2025
Edit   Del	Marketing_Product Inquiry Response	Text	✓	Standard email response to website product inquiries	OEPIC	11/13/2025
Edit   Del	Order Confirmation Email	HTML	✓		edi	11/19/2025
Edit   Del	Rescheduled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm rescheduling of a service appointment.	sfdcadmin	11/13/2025
Edit   Del	Sales_New Customer Email	Text	✓	Email to new customers	OEPIC	11/13/2025
Edit   Del	Scheduled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm scheduling of a service appointment.	sfdcadmin	11/13/2025
Edit   Del	Scheduler Payments_Payment Reminder for Service Appointment_Email	Custom	✓	Email Template to remind customers to pay for their service appointment.	sfdcadmin	11/13/2025
Edit   Del	Scheduler Payments_Service Appointment Cancellation Email	Custom	✓	Email Template to confirm the cancellation of a paid service appointment.	sfdcadmin	11/13/2025
Edit   Del	Scheduler Payments_Service Appointment Confirmation Email	Custom	✓	Email Template to confirm scheduling of a paid service appointment.	sfdcadmin	11/13/2025
Edit   Del	Scheduler Payments_Service Appointment Confirmation Email for Guest Users	Custom	✓	Email Template to confirm scheduling of a paid service appointment for guest users.	sfdcadmin	11/13/2025
Edit   Del	Scheduler Payments_Service Appointment Rescheduled Email	Custom	✓	Email Template to confirm the rescheduling of a paid service appointment for authenticated users.	sfdcadmin	11/13/2025

## 8. Flow Implementation

### a. Order Confirmation Flow

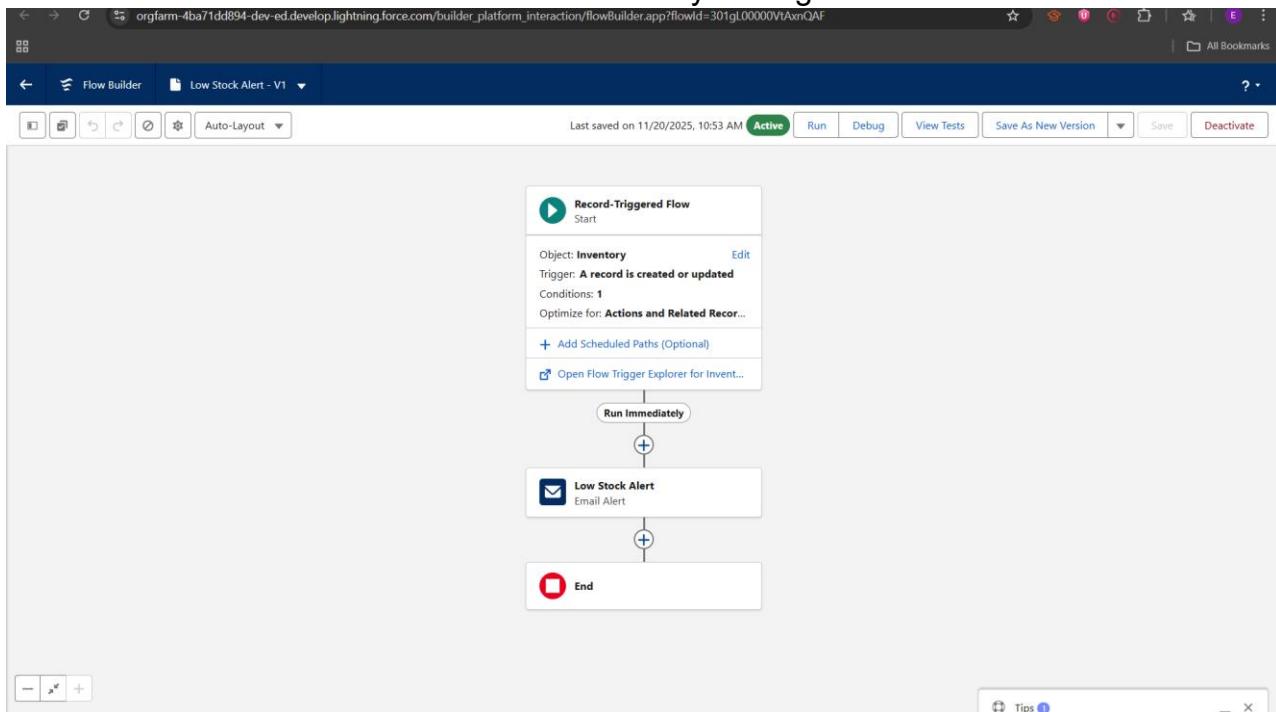
- Triggered when an order is updated to Confirmed.
- Sends an Order Confirmation email to the related customer.



### b. Low Stock Alert Flow

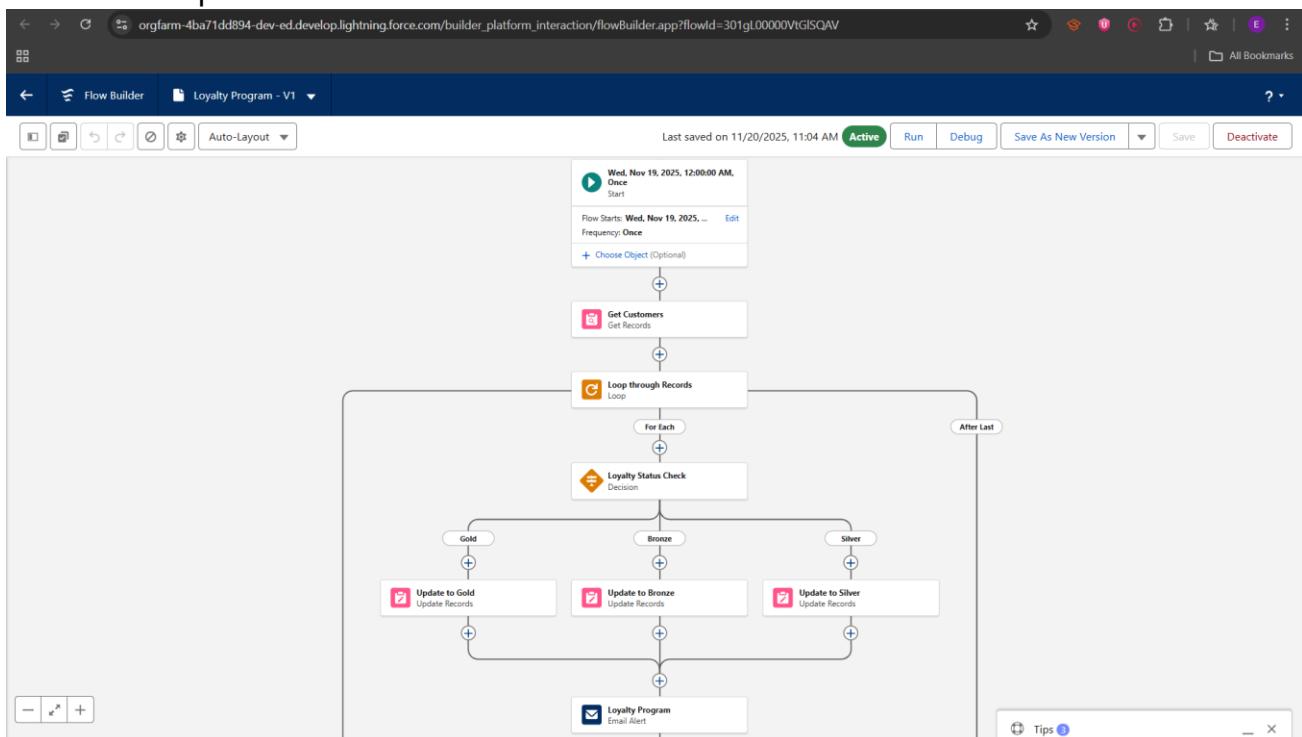
- Triggered when Inventory stock drops below 5.

- Sends Low Stock email to Inventory Manager.



### c. Scheduled Flow: Loyalty Update

- Runs daily at midnight.
- Loops through customers and updates their Loyalty Status based on total purchases.



## 9. Apex Triggers

- Order Total Trigger: Auto-calculates Total Amount based on quantity and unit price.
- Stock Deduction Trigger: Reduces stock when an order is placed.
- Loyalty Status Trigger: Updates Loyalty Status based on total purchases.

The screenshot shows the Salesforce Apex code editor interface. At the top, there are tabs for 'OrderTotalTrigger.apex' and 'StockDeductionTrigger.apex'. The current file, 'StockDeductionTrigger.apex', is displayed. The code implements a trigger on the 'HandsMen\_Order\_\_c' object. It iterates through inserted or updated orders, adds their product IDs to a set if their status is 'Confirmed' and they have a product assigned. Then, it queries related inventories for these products and updates their stock quantities. A log tab at the bottom shows no entries.

```
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) {
```

## PROJECT DEMONSTRATION FLOW

### Project Demonstration Video Link:

<https://drive.google.com/file/d/16sAfESkgIFL15NEx-xr1bnJ8GKIULuFi/view?usp=sharing>

## 1. Customer Registration

A customer, **Lily Lee**, visits the HandsMen Threads store or website. In Salesforce, we create a new record in the **HandsMen Customers** object, entering her name, phone number, and email.

A **Validation Rule** ensures Lily's email follows the correct format. For example, if we forget to add ".com", Salesforce displays an error message. After correcting it, a **toast message** confirms the customer record has been successfully created.

## 2. Product Setup

Next, we add a new product to the HandsMen Products object. For example:

- Product Name: Necktie
- SKU: 002

- Price: 150
- Stock Quantity: 300 pieces

### 3. Inventory Setup

To manage product stock, we record this product inside the Inventory object. Since the Inventory object has a lookup relationship with HandsMen Products, we simply select the product Necktie and enter:

- Available Stock: 300
- Warehouse Location: Aisle 1, Column 2

Saving the record successfully adds it to the inventory.

### 4. Order Placement

Now, let's place an order in the HandsMen Orders object.

Customer Lee Sangwon wants to buy 5 Neckties.

We fill out:

- Status: Pending
- Product: Necktie
- Quantity: 5
- Customer Email: [erikaquizon04@gmail.com](mailto:erikaquizon04@gmail.com)

The Total Amount automatically updates based on the quantity and price, thanks to an Apex Trigger.

Saving the order shows another toast message confirming its creation.

### 5. Inventory Update (Apex Trigger)

Behind the scenes, the StockDeductionTrigger automatically updates inventory.

When the order status is changed from Pending → Confirmed, the trigger deducts the purchased quantity from the stock.

Example:

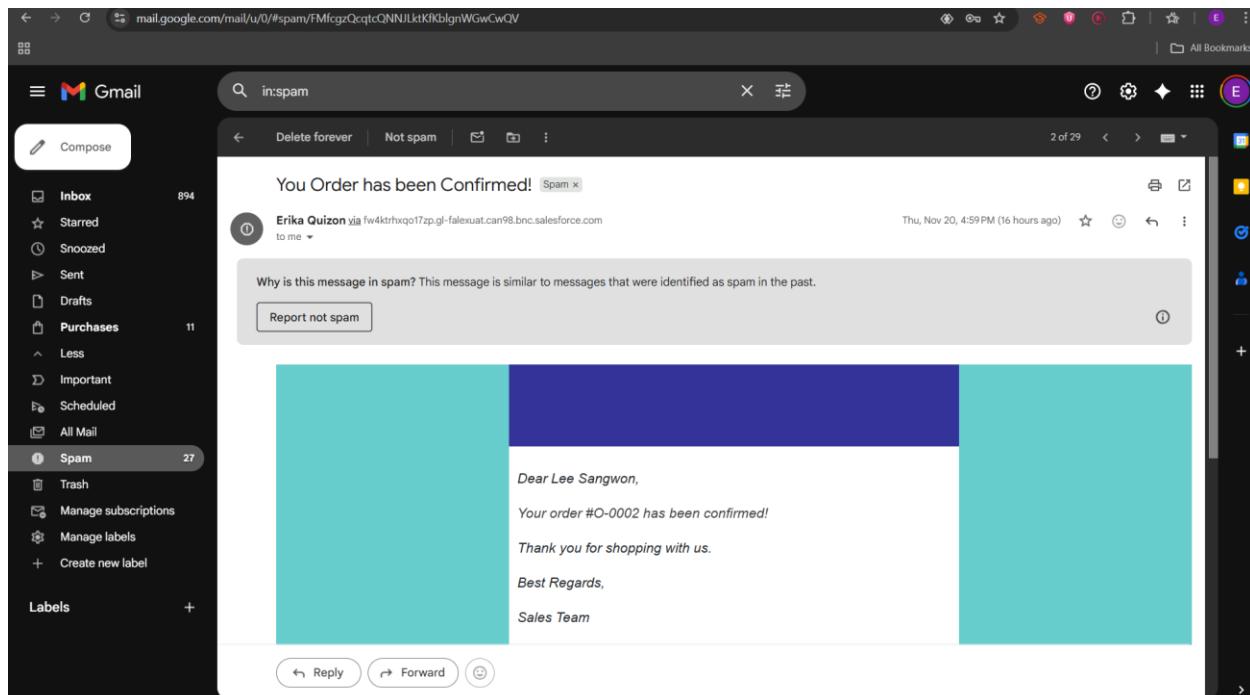
- If Sangwon buys 5 Neckties from the original 300, the inventory updates to 295.
- A Validation Rule also ensures that stock can never go below zero.

Loyalty Program

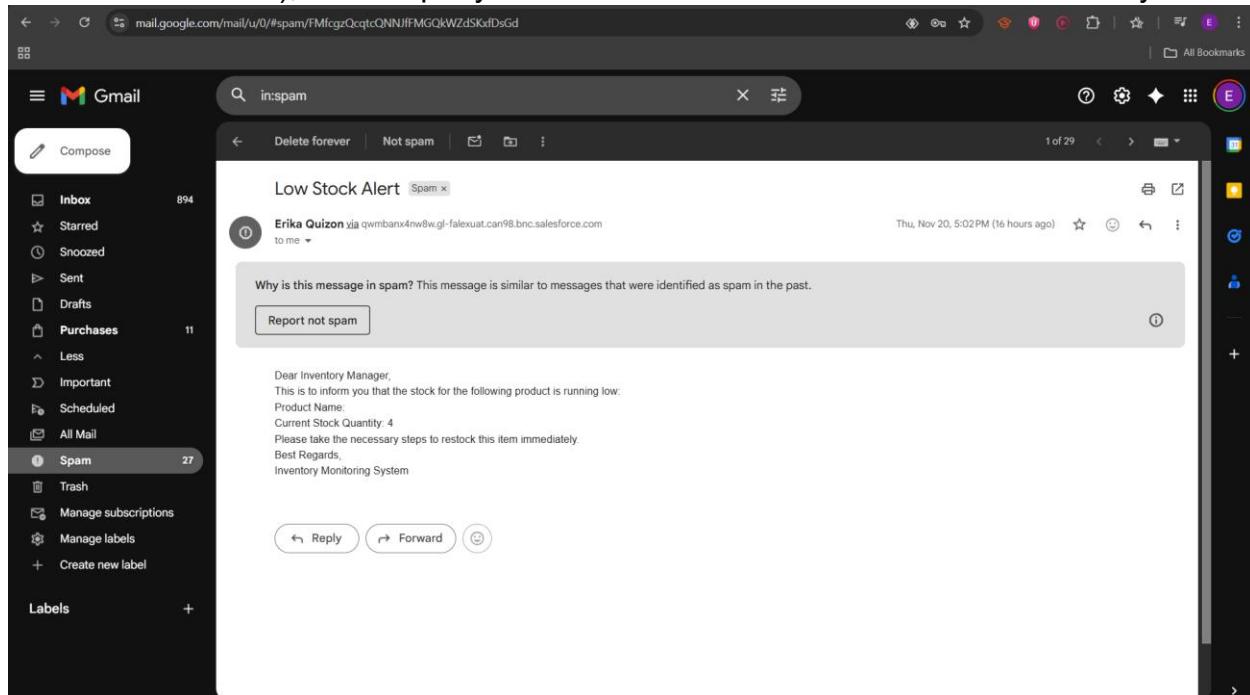
### 6. Email Notification

HandsMen Threads uses a Flow to send email notifications during key events:

- Order Confirmation Email: When the order status becomes Confirmed, an automated email is sent:



- Low Stock Alert: If stock falls below a threshold (e.g., we manually change it to 2), the company receives a Low Stock Alert email automatically.



- Loyalty Program Email: A scheduled trigger runs daily (12 AM) to check customer total purchases:
  - Below 500 → Bronze
  - 500 – 1000 → Silver
  - Above 1000 → Gold

For example, if Lily's total purchase is updated to 1200, her loyalty status becomes Gold, and she will receive an email—though this will only be triggered at midnight due to the schedule.

## CONCLUSION

By integrating custom objects, validation rules, email alerts, flows, and Apex triggers, we successfully built an optimized business process for HandsMen Threads. This ensures smooth customer registration, product management, inventory tracking, automated notifications, and loyalty reward updates.

## DEFINITION OF TERMS

**Salesforce.** A cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer data, automate processes, and improve service, marketing, and sales operations. It provides point-and-click tools as well as programming capabilities (like Apex and Flows) to build custom business solutions.

**Customer Objects.** Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data.

**Tabs.** Tabs are used to display object data in the Salesforce UI.

**Custom App.** An App in Salesforce is a collection of tabs grouped together for a specific business purpose.

**Profiles.** Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field access, and more.

**Roles.** Roles control the data visibility in Salesforce's role hierarchy. It's used for sharing settings and reporting.

**Permission Sets.** Permission Sets grant additional permissions to users without changing their profile.

**Validation Rules.** Validation rules ensure data entered meets business criteria.

**Email Templates.** Predefined formats for sending emails to customers or users

**Email Alerts.** Email Alerts are actions in Flows or Workflow Rules that send emails using predefined templates.

**Flows.** Flows automate business logic without code. They can create, update, or send notifications.

**Apex.** Apex is Salesforce's object-oriented programming language. It allows developers to write custom logic.