

HANDSMEN THREADS: ELEVATING THE ART OF SOPHISTICATION IN MEN'S FASHION

A Capstone Project Documentation for a
Custom Salesforce CRM Solution

Polytechnic University of the Philippines – Santa Maria, Bulacan Campus
Bachelor of Science in Information Technology 4-1

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Project Overview

It is challenging for many retail businesses to track consumers, manage inventory, keep an eye on orders, and launch targeted campaigns because they use disconnected systems. For a business to grow, it must be forward-thinking; HandsMen Threads, a modern brand in the men's fashion industry, is taking that step by building a Salesforce solution that improves how they manage data and interact with customers. The CRM is designed to solve common challenges in retail, such as unorganized information, manual workflows, and limited visibility into customer behavior/loyalty. It includes custom objects for customers, products, orders, inventory, and marketing campaigns, combined with automated workflows, Apex logic, and a defined security model using profiles and different access levels. By consolidating these processes into a single Salesforce environment, the system becomes more automated, accurate, and easy to maintain. Thus, giving the business the tools it needs to operate more efficiently and make smarter decisions.

Objectives

This project aims to improve HandsMen Thread's workflow, and to make it efficient at handling multiple inputs like orders, customers for example. The following are additional objectives that the CRM project aims to solve to help HandsMen Threads:

- Centralize all business data into a unified and, most importantly, accessible platform
- Automate customer communication for order confirmations and loyalty updates
- Maintain accurate inventory data and automate stock alerts
- Streamline order processing with integrated financial record updates
- Support targeted marketing campaigns using customer insights through records
- Provide a secure, role-based system with appropriate access controls
- Reduce manual workload through flows, email notifications, and Apex logic
- Create a scalable foundation for future expansion

Phase 1: **Requirement Analysis & Planning**

A.Understanding Business Requirements

Handsmen Threads needed a single system to handle customer information, product details, order transactions, marketing operations, and stock control. The project solves the following challenges:

- Fragmented customer data
- Inefficient manual inventory tracking
- Lack of automation in order notifications
- Difficulty in running segmented marketing campaigns
- No centralized view of business performance
- Limited access restrictions for users

Project Scope

Throughout the development of this project, it will include:

- Creating custom Salesforce objects
- Building automations using Flow
- Implementing Apex triggers and batch jobs
- Creating email templates for communication
- Configuring profiles, roles, and permission sets
- Designing page layouts and Lightning pages
- Setting up reports and dashboards

B. Data Model & Security Model

- **Custom Objects:** Customers, Orders, Products, Inventory, Marketing Campaigns
- **Fields:** Customer details, product SKU, price, stock quantity, loyalty status, etc.
- **Security Model:**
 - Custom Profile: Platform 1
 - Role Hierarchy: CEO → Sales, Inventory, Marketing
 - Permission Sets: Sales, Marketing, Inventory
 - Access levels defined per object

C. Stakeholder Mapping

- **CEO:** Full visibility
- **Sales Team:** Manage customers and orders
- **Inventory Team:** Manage stock levels, update product details
- **Marketing Team:** Handle campaigns and customer segmentation

D. 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

Deliverable:

Solution Design Document including Object Model, ERD, and Automation Strategy.

Phase 2: Salesforce Development - Backend & Configurations

Setup environment & DevOps workflow

I signed up for a Developer edition account, reset my password, and logged in.

The image contains two side-by-side screenshots of the Salesforce sign-up and welcome interface.

Left Screenshot: Sign up for your Developer Edition

This screenshot shows the sign-up form for a Developer Edition account. The fields filled in are:

- First name: Jamima
- Last name: Condaraan
- Job title: Developer
- Work email: jamimacondaraan@gmail.com
- Company: Polytechnic University
- Country/Region: Philippines

Below the form, there is a checkbox agreement and a reCAPTCHA verification. The "Sign Me Up" button is at the bottom.

Right Screenshot: Welcome to your Developer Edition

This screenshot shows the welcome message for the new account. It includes:

- A greeting: Hi Jamima,
- A message: Thanks for signing up for a Developer Edition. Now you can start building on Salesforce for free and get hands-on with Agentforce and Data Cloud.
- A step instruction: There's just one more step. Use the following link to reset the password for your Developer Edition. This link expires in 24 hours. A blue "Reset Password" button is present.
- A URL: <https://orgfarm-be583b625a-dev-ed.develop.my.salesforce.com>
- The username: jamimacondaraan832@agentforce.com
- A note: Your Developer Edition, now enabled with Agentforce and Data Cloud, remains active as long as you continue to use it. It expires after 45 days of non-usage.
- A closing message: Again, welcome to Salesforce!
Developer Relations

At the bottom, there is a copyright notice: © Copyright 2000-2025 [salesforce.com](#). inc. All rights reserved. Various trademarks held by their respective owners.

This screenshot shows the Salesforce Setup Home page. The main message is "Welcome, Jamima". Below it, there are three cards representing popular business goals:

- Achieve Popular Business Goals**
 - Cross Cloud Connect with Sales Prospects and Customers**: Help sales reps prioritize and engage with customers. Includes: Sales Cloud Everywhere, Agentforce (Default), Einstein Sales Emails. Status: 3 Completed, 1 In Progress. [Keep Going](#).
 - Cross Cloud Track & Manage Customer Data**: Collect, organize, and analyze customer data to drive insights, personalize experiences, and boost engagement. Includes: Case Management, Feedback Management, Einstein Activity Capture. Status: 2 Completed, 1 In Progress. [Keep Going](#).
 - Sales Capture & Auto-Qualify Leads**: Qualify and pass leads to reps and convert qualified leads quickly. Includes: Prospecting Center, Sales Engagement, Cadences. Status: 1 Completed. [Keep Going](#).

The right sidebar shows user information (Jamima Condaraan, orgfarm-be583b625a-dev-ed.develop.my.salesforce.com), display density settings (Compact selected), and options to switch to Salesforce Classic or add a username.

Customization of Objects & Fields

HandsMen Customers (HandsMen_Customer__c | Custom Object)

These are the fields and relationships necessary for proper storage of customer information.

| Fields & Relationships 11 items, Sorted by Field Label | | | | | |
|-----------------------------------------------------------|------------------------|--------------------|--------------------|-------------------|---------|
| | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| Details | Created By | CreatedById | Lookup(User) | | |
| Fields & Relationships | Email | Email__c | Email | | |
| Page Layouts | FirstName | FirstName__c | Text(60) | | |
| Lightning Record Pages | FullName | FullName__c | Formula (Text) | | |
| Buttons, Links, and Actions | HandsMen Customer Name | Name | Text(80) | | |
| Compact Layouts | Last Modified By | LastModifiedById | Lookup(User) | | |
| Field Sets | LastName | LastName__c | Text(60) | | |
| Object Limits | Loyalty Status | Loyalty_Status__c | Picklist | | |
| Record Types | Owner | OwnerId | Lookup(User,Group) | | |
| Related Lookup Filters | Phone | Phone__c | Phone | | |
| Search Layouts | Total Purchases | Total_Purchases__c | Number(18, 0) | | |

HandsMen Order (HandsMen_Order__c | Custom Object)

Here are the fields & relationships for HandsMen Threads Orders.

| Fields & Relationships 10 items, Sorted by Field Label | | | | | |
|-----------------------------------------------------------|----------------------|----------------------|---------------------------|-------------------|---------|
| | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| Details | Created By | CreatedById | Lookup(User) | | |
| Fields & Relationships | Customer Email | Customer_Email__c | Email | | |
| Page Layouts | HandsMen Customer | HandsMen_Customer__c | Lookup(HandsMen Customer) | | |
| Lightning Record Pages | HandsMen OrderNumber | Name | Auto Number | | |
| Buttons, Links, and Actions | HandsMen Product | HandsMen_Product__c | Lookup(HandsMen Product) | | |
| Compact Layouts | Last Modified By | LastModifiedById | Lookup(User) | | |
| Field Sets | Owner | OwnerId | Lookup(User,Group) | | |
| Object Limits | Quantity | Quantity__c | Number(18, 0) | | |
| Record Types | Status | Status__c | Picklist | | |
| Related Lookup Filters | Total Amount | Total_Amount__c | Number(18, 0) | | |

HandsMen Product (HandsMen_Product__c | Custom Object)

These are the custom fields and relationships for the products

| Fields & Relationships | | | | | |
|-----------------------------|-----------------------|------------------|--------------------|-------------------|---------|
| | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| Page Layouts | Created By | CreatedBy | Lookup(User) | | |
| Lightning Record Pages | HandsMen Product Name | Name | Text(80) | | ✓ |
| Buttons, Links, and Actions | Last Modified By | LastModifiedBy | Lookup(User) | | |
| Compact Layouts | Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Field Sets | Price | Price_c | Currency(18, 0) | | |
| Object Limits | SKU | SKU_c | Text(80) | | |
| Record Types | Stock Quantity | Stock_Quantity_c | Number(18, 0) | | |
| Related Lookup Filters | | | | | |
| Search Layouts | | | | | |

Inventory (Inventory__c | Custom Object)

| Fields & Relationships | | | | | |
|-----------------------------|------------------|--------------------|---------------------------------|-------------------|---------|
| | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| Page Layouts | Created By | CreatedBy | Lookup(User) | | |
| Lightning Record Pages | HandsMen Product | HandsMen_Product_c | Master-Detail(HandsMen Product) | | ✓ |
| Buttons, Links, and Actions | Inventory Number | Name | Auto Number | | ✓ |
| Compact Layouts | Last Modified By | LastModifiedBy | Lookup(User) | | |
| Field Sets | Stock Quantity | Stock_Quantity_c | Number(18, 0) | | |
| Object Limits | Stock Status | Stock_Status_c | Formula (Text) | | |
| Record Types | Warehouse | Warehouse_c | Text(80) | | |
| Related Lookup Filters | | | | | |
| Search Layouts | | | | | |

Marketing Campaign (Marketing_Campaign__c | Custom Object)

The screenshot shows the 'Fields & Relationships' section of the Marketing Campaign object setup. It lists seven fields: Created By, End Date, HandsMen Customer, Last Modified By, Marketing Campaign Number, Owner, and Start Date. The 'Last Modified By' field is highlighted with a yellow background.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|---------------------------|----------------------|---------------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| End Date | EndDate__c | Date | | |
| HandsMen Customer | HandsMen_Customer__c | Lookup(HandsMen Customer) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Marketing Campaign Number | Name | Auto Number | | |
| Owner | OwnerId | Lookup(User,Group) | | |
| Start Date | StartDate__c | Date | | |

Validation Rules

HandsMen Customer Validation Rule – Email

The screenshot shows the 'Validation Rule Detail' page for the 'Email' validation rule. The rule name is 'Email'. The error condition formula is 'NOT CONTAINS(Email__c , "@gmail.com")'. The error message is 'Please fill Correct Gmail'. The error location is 'Top of Page'. The rule is active. The created by user is Jamima Condaraan, and the modified by user is also Jamima Condaraan.

| Rule Name | Email | Active | |
|-------------------------|----------------------------------------|----------------|---------------------------------------|
| Error Condition Formula | NOT CONTAINS(Email__c , "@gmail.com") | ✓ | |
| Error Message | Please fill Correct Gmail | Error Location | Top of Page |
| Description | | | |
| Created By | Jamima Condaraan, 11/22/2025, 6:45 AM | Modified By | Jamima Condaraan, 11/23/2025, 9:48 PM |

This ensures that their email address ends with an "@gmail.com"

Inventory Validation Rule – Stock_Quantity

Inventory Validation Rule [Help for this Page](#)

[Back to Inventory](#)

| Validation Rule Detail | | Edit | Clone |
|--------------------------------------------|----------------------------------------------|----------------------|---------------------------------------|
| Rule Name | Stock_Quantity | Active | <input checked="" type="checkbox"/> |
| Error Condition Formula | Stock_Quantity__c <= 0 | | |
| Error Message | the inventory count is never less than zero. | Error Location | Top of Page |
| Description | | | |
| Created By | Jamima Condaraan, 11/22/2025, 6:43 AM | Modified By | Jamima Condaraan, 11/23/2025, 9:47 PM |
| Edit Clone | | | |

This rule ensures that the inventory count will not be less than zero.

HandsMen Order Validation Rule – Total_Amount

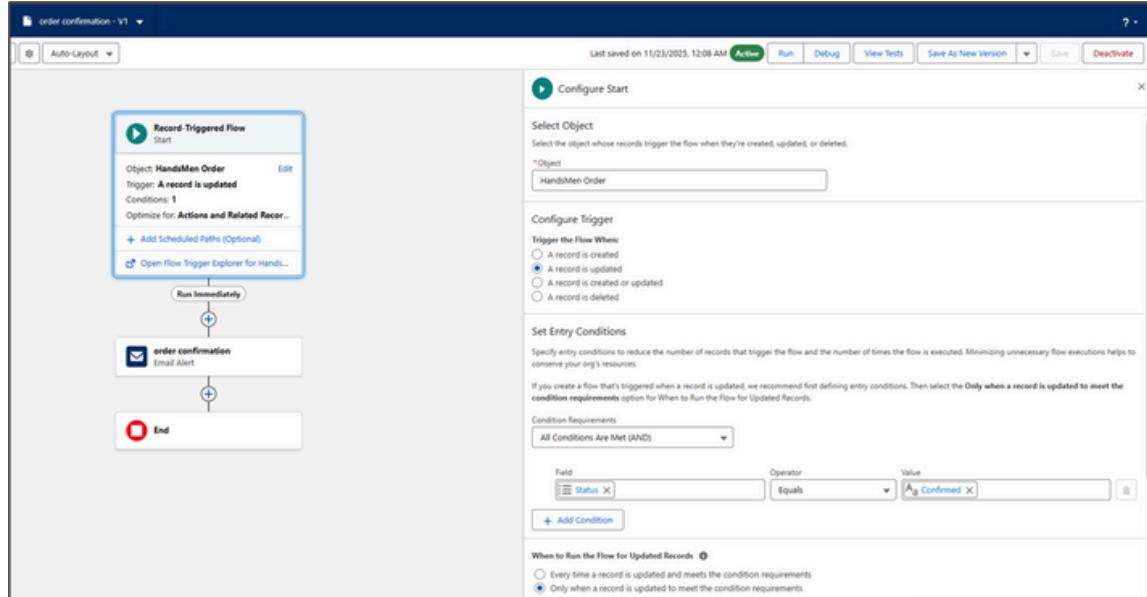
HandsMen Order Validation Rule [Help for this Page](#)

[Back to HandsMen Order](#)

| Validation Rule Detail | | Edit | Clone |
|--------------------------------------------|---------------------------------------|----------------------|---------------------------------------|
| Rule Name | Total_Amount | Active | <input checked="" type="checkbox"/> |
| Error Condition Formula | Total_Amount__c <= 0 | | |
| Error Message | Please Enter Correct Amount | Error Location | Total Amount |
| Description | | | |
| Created By | Jamima Condaraan, 11/22/2025, 6:41 AM | Modified By | Jamima Condaraan, 11/23/2025, 9:43 PM |
| Edit Clone | | | |

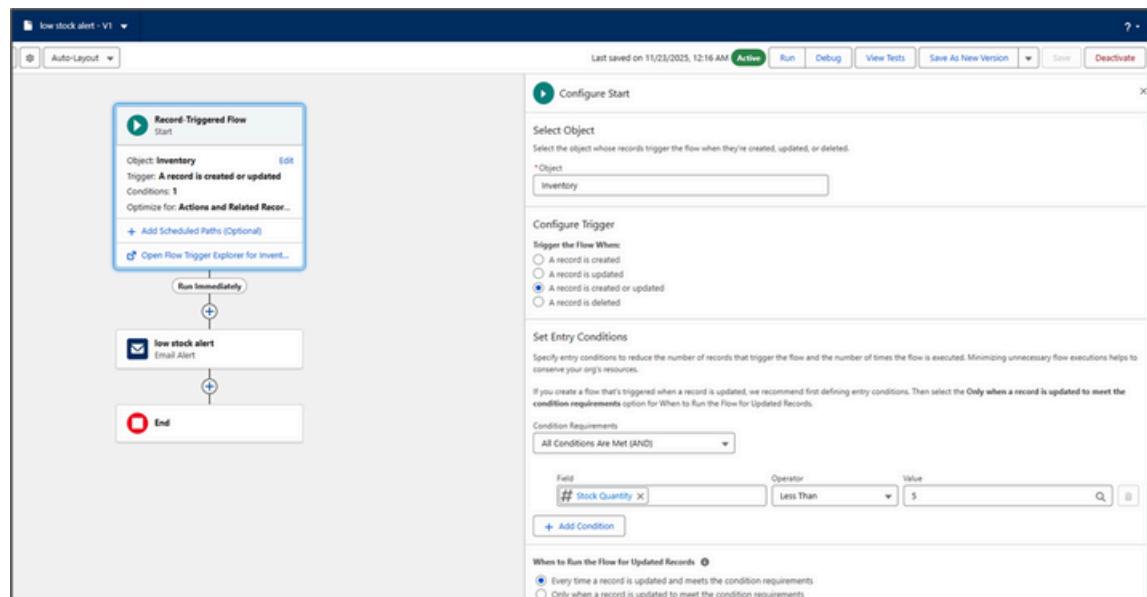
Automation

Order Confirmation Flow - Record-Triggered After Save Flow



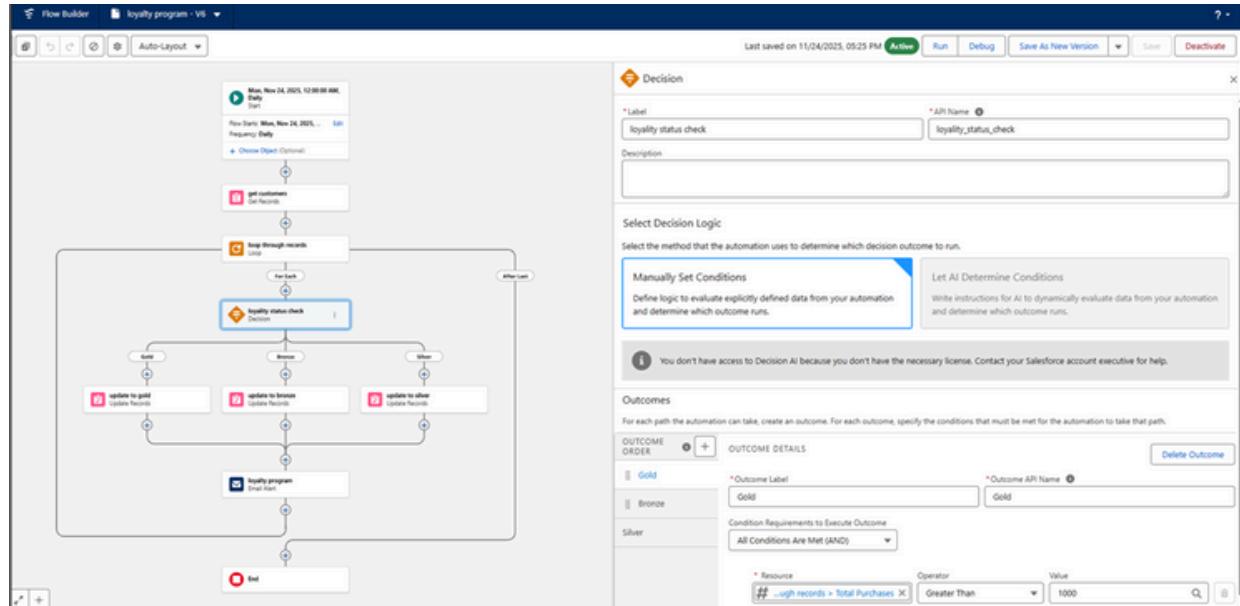
An automated flow for alerting the customer that their order is confirmed.

Low Stock Alert - Record-Triggered After Save Flow



This is a record-triggered flow to notify the team that an item is less than 5 in stock.

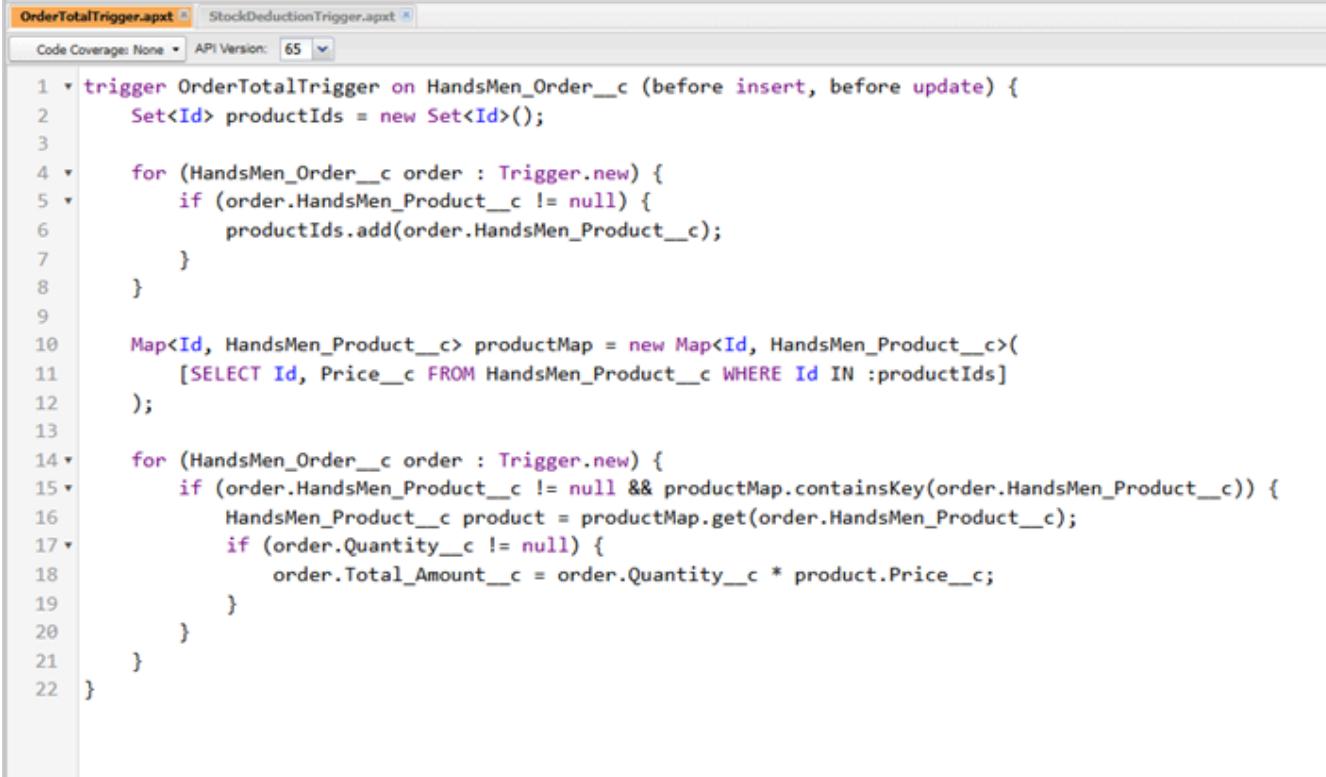
Loyalty Program Email – Schedule-Triggered Flow



This flow notifies customers if their loyalty tier has been upgraded, if their total purchases reach a certain amount.

Apex Triggers

Order Total Trigger



The screenshot shows the Salesforce code editor with the tab 'OrderTotalTrigger.apxt' selected. The code implements a trigger on the HandsMen_Order__c object. It first collects all product IDs from the trigger.new list. Then, it queries a map of products based on these IDs. Finally, it iterates through the trigger.new list again to calculate the total amount for each order by multiplying quantity and price.

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

This calculates the total before the order is saved.

Stock Deduction Trigger

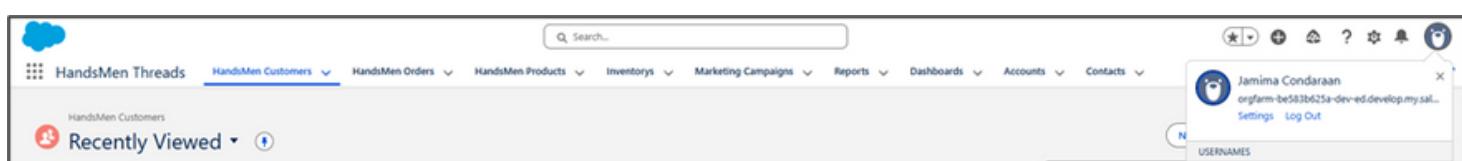
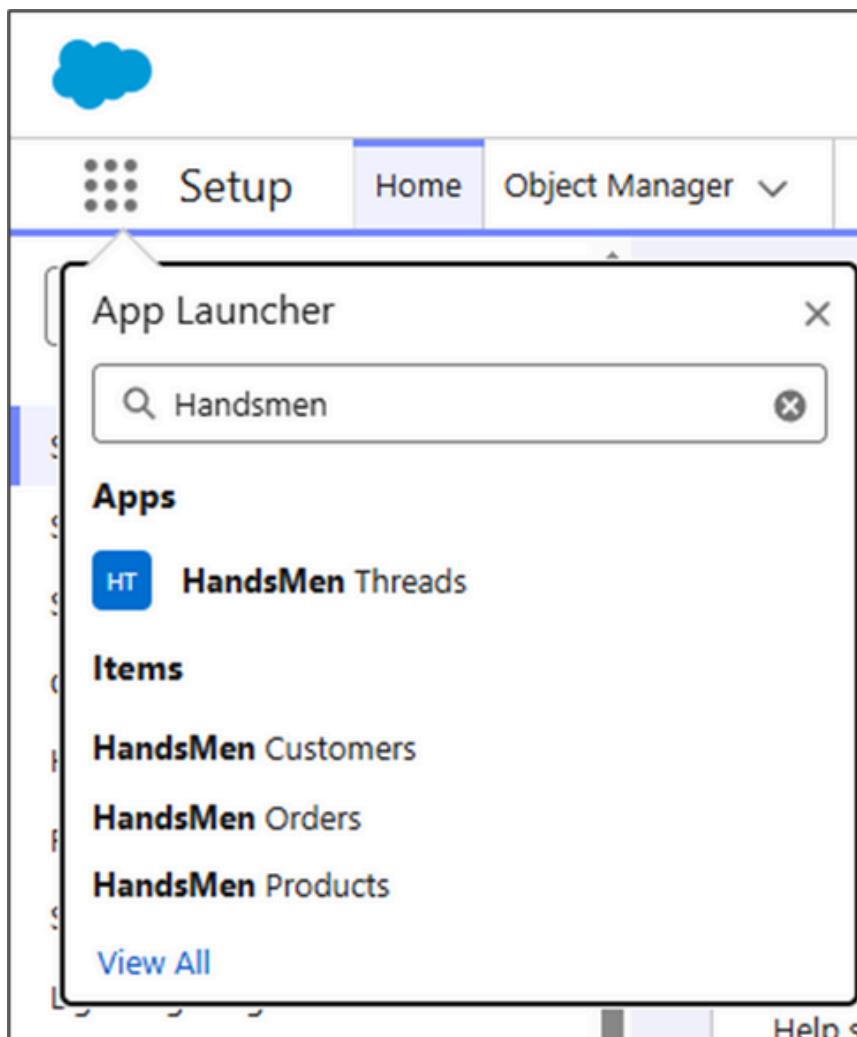
```
trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
    Set<Id> productIds = new Set<Id>();
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }
    if (productIds.isEmpty()) return;
    // Query related inventories based on product
    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
        FROM Inventory__c
        WHERE HandsMen_Product__c IN :productIds]
    );
    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            for (Inventory__c inv : inventoryMap.values()) {
                if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
                    inv.Stock_Quantity__c -= order.Quantity__c;
                    inventoriesToUpdate.add(inv);
                    break;
                }
            }
        }
    }
    if (!inventoriesToUpdate.isEmpty()) {
        update inventoriesToUpdate;
    }
}
```

This updates the inventory after the order is confirmed.

Phase 3:

UI/UX Development & Customization

Lightning App Setup



App Name:

HandsMen Threads

- This app has access to the custom objects that I've created like the HandsMen Customers, Orders, and Products.

Page Layouts & Dynamic Forms

HandsMen Customers – Customers List

The screenshot shows the 'HandsMen Customers' list page. At the top, there are navigation tabs: 'HandsMen Threads', 'HandsMen Customers' (which is active and highlighted in blue), 'HandsMen Orders', 'HandsMen Products', and 'More'. Below the tabs is a section titled 'Recently Viewed' with a dropdown arrow and a refresh icon. It displays a list of 5 items, all updated 5 minutes ago. The list includes: 1. Philip Tolentino, 2. jamima condaraan, 3. michael, 4. james, and 5. john. Each item has a checkbox and a dropdown arrow icon. To the right of the list are several buttons: 'New', 'Import', 'Change Owner', and 'Assign Label'. Below these buttons is a search bar with the placeholder 'Search this list...' and a magnifying glass icon. Further down are icons for settings, grid view, list view, and other actions.

HandsMen Customers – Customers Details

The screenshot shows the 'HandsMen Customer' details page for 'Philip Tolentino'. At the top, there are navigation tabs: 'HandsMen Threads', 'HandsMen Customers' (active), 'HandsMen Orders', 'HandsMen Products', and 'More'. Below the tabs is a section for 'Philip Tolentino' with a profile icon. To the right are buttons for 'New Contact', 'Edit', and 'New Opportunity'. The main area is divided into two sections: 'Related' and 'Details'. The 'Details' section contains the following fields and their values:

| | | | |
|------------------------|---------------------------|------------------|---------------------|
| HandsMen Customer Name | Philip Tolentino | Owner | Jamima Condaraan |
| Email | philiptolentino@gmail.com | | |
| Phone | 092347859 | | |
| Loyalty Status | Gold | | |
| FirstName | Philip | | |
| LastName | Tolentino | | |
| FullName | Philip Tolentino | | |
| Total Purchases | 10 | | |
| Created By | Jamima Condaraan | Last Modified By | Jamima Condaraan |
| | 11/27/2025, 4:47 AM | | 11/27/2025, 4:47 AM |

HandsMen Orders – Orders List

The screenshot shows a list of 6 items, sorted by HandsMen OrderNumber. The items are numbered 1 through 6, each with a checkbox and a link to the order details. The list is filtered to show 'All' orders. There are buttons for New, Import, Change Owner, Printable View, and Assign Label. A search bar at the top right allows searching the list.

| | HandsMen OrderNumber | Action |
|---|----------------------|--------|
| 1 | O-0012 | ▼ |
| 2 | O-0010 | ▼ |
| 3 | O-0009 | ▼ |
| 4 | O-0006 | ▼ |
| 5 | O-0005 | ▼ |
| 6 | O-0004 | ▼ |

HandsMen Orders – Order Details

The screenshot shows the details for Order O-0009. The order number is displayed prominently. The 'Details' tab is selected. The form includes fields for OrderNumber (O-0009), Product (Urban Pants), Customer (jamima condaraan), Status (Pending), Quantity (250), Total Amount (45,000), Customer Email (jamimacondaraan@gmail.com), Created By (Jamima Condaraan), and Last Modified By (Jamima Condaraan) with the timestamp 11/24/2025, 11:36 PM.

HandsMen Products – Product List

The screenshot shows the 'HandsMen Products' section of a software interface. At the top, there are navigation tabs: 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products' (which is highlighted in blue), and 'More'. Below the tabs, a search bar contains the placeholder 'Search this list...'. To the left of the search bar is a filter icon with a red circle containing a white 'P' and a dropdown menu set to 'All'. To the right are buttons for 'New', 'Import', 'Change Owner', 'Printable View', and 'Assign Label'. A message at the top states '6 items • Sorted by HandsMen Product Name • Updated a few seconds ago'. Below this are several small circular icons with icons like a gear, a grid, a person, a refresh, a pencil, a magnifying glass, and a downward arrow. The main area displays a table of products:

| | HandsMen Product Name ↑ | |
|---|-------------------------|---|
| 1 | Elegance Shoes | ▼ |
| 2 | Luxe Palette | ▼ |
| 3 | T-shirt cloth | ▼ |
| 4 | Urban Pants | ▼ |
| 5 | Varsity jacket | ▼ |
| 6 | Velvet Vogue | ▼ |

HandsMen Products – Product Details

The screenshot shows the 'HandsMen Product' details for 'Urban Pants'. The top navigation bar is identical to the previous screenshot. The product name 'Urban Pants' is displayed prominently. Below it, there are two tabs: 'Related' and 'Details', with 'Details' being the active tab. The 'Details' tab contains the following information:

| | |
|------------------------------------------------------|-----------------------------------------------------------|
| HandsMen Product Name Urban Pants | Owner Jamima Condaraan |
| SKU KS944RUR | |
| Price \$180 | |
| Stock Quantity 250 | |
| Created By Jamima Condaraan, 11/24/2025, 11:35 PM | Last Modified By Jamima Condaraan, 11/27/2025, 1:50 AM |

Below the table, there are three buttons: 'New Contact', 'Edit', and 'New Opportunity'.

Inventorys List

The screenshot shows the 'Inventorys' list page. At the top, there are navigation links: 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'Inventorys' (which is underlined in blue), and 'More'. Below the navigation is a search bar with the placeholder 'Search this list...' and a filter section labeled 'Inventorys' with a dropdown set to 'All'. There are also buttons for 'New', 'Import', 'Printable View', and 'Assign Label'. A message indicates '6 items • Sorted by Inventory Number • Updated a few seconds ago'. Below this are six items listed in a table:

| | Inventory Number | |
|---|------------------|---|
| 1 | I-0002 | ▼ |
| 2 | I-0004 | ▼ |
| 3 | I-0005 | ▼ |
| 4 | I-0008 | ▼ |
| 5 | I-0009 | ▼ |
| 6 | I-0011 | ▼ |

Inventorys – Inventory Item Details

The screenshot shows the details for an inventory item with the number 'I-0009'. The top navigation is identical to the previous screen. The main area displays the following details:

| Related | Details |
|------------------|------------------------------------------------------------|
| Inventory Number | I-0009 |
| HandsMen Product | Urban Pants |
| Stock Quantity | 250 |
| Stock Status | Available |
| Warehouse | |
| Created By | Jamima Condaraan , 11/24/2025, 11:35 PM |
| Last Modified By | Jamima Condaraan , 11/24/2025, 11:35 PM |

Marketing Campaigns List

The screenshot shows a list of Marketing Campaigns. At the top, there are navigation tabs: HandsMen Threads, HandsMen Customers, HandsMen Orders, Marketing Campaigns (which is selected and underlined), and More. Below the tabs are buttons for New, Import, Change Owner, and Assign Label. A search bar says "Search this list..." and various filter icons. A "Recently Viewed" section shows two items: "MC -0001" and "MC -0002".

| | Marketing Campaign Number | |
|---|---------------------------|---|
| 1 | MC -0001 | ▼ |
| 2 | MC -0002 | ▼ |

Marketing Campaigns Item Details

The screenshot shows the details for a specific Marketing Campaign, "MC -0001". The top navigation is identical to the list page. The main area displays the campaign number "MC -0001" and three tabs: Related, Details (which is selected and underlined), and Contact. Under the Details tab, there are two columns of information: "Marketing Campaign Number" (MC -0001) and "Owner" (Jamima Condaraan). Below these are sections for "HandsMen Customer" (jamima condaraan), "Created By" (Jamima Condaraan, 11/27/2025, 1:15 AM), and "Last Modified By" (Jamima Condaraan, 11/27/2025, 1:15 AM).

Reports

HandsMen Threads HandsMen Customers HandsMen Orders Reports More

Reports
Recent
0 items

RECENT REPORTS

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Search recent reports... New Report New Folder Settings



Recent reports appear here
Go to All Reports to see what's available.
[View All Reports](#)

Contacts

HandsMen Threads HandsMen Customers HandsMen Orders Contacts More

Contacts My Contacts

Created This Quarter Owner Me Search List View

Total Contacts: 0 No Activity: 0 Idle: 0 No Upcoming: 0 Overdue: 0 Due Today: 0 Upcoming: 0

0 items • Filtered by Created Date, Me, Total Contacts

Send Email Assign Label

Contacts

HandsMen Threads HandsMen Customers HandsMen Orders Dashboards More

Recent

0 items

DASHBOARDS

Recent

Created by Me
Private Dashboards
All Dashboards

FOLDERS

All Folders
Created by Me
Shared with Me

FAVORITES

All Favorites

Search recent dashboards... New Dashboard New Folder ⚙



Recent dashboards appear here
Go to All Dashboards to see what's available.
[View All Dashboards](#)

Accounts

HandsMen Threads HandsMen Customers HandsMen Orders Accounts More

Accounts

All Accounts

13 items • Sorted by Account Name • Updated a few seconds ago

New Import Printable View Assign Label

Search this list...

| | Account Name ↑ | A... ↓ | Billing St... ↓ | Phone ↓ | Type ↓ | Acc... ↓ | |
|---|--------------------------------------------------------------|--------|-----------------|----------------|--------------------|----------|---|
| 1 | <input type="checkbox"/> Burlington Textiles Corp of America | | North Carolina | (336) 222-7000 | Customer - Direct | OEPIC | ⋮ |
| 2 | <input type="checkbox"/> Dickenson plc | | Kansas | (785) 241-6200 | Customer - Channel | OEPIC | ⋮ |

User Management

The screenshot shows the Salesforce 'Users' page under 'SETUP'. The title bar includes a blue icon with a person symbol and the word 'Users'. Below the title, it says 'All Users' and provides a brief description: 'On this page you can create, view, and manage users.' A 'Help for this Page' link is also present.

Below the description, there are buttons for 'View' (All Users), 'Edit', and 'Create New View'. At the top right, there's a navigation bar with letters A through Z and an 'Other' link.

The main area displays a table of user records:

| Action | Full Name | Alias | Username | Role | Active | Profile |
|-------------------------------------|--------------------|---------|------------------------------------------------------------|-----------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> | Chatter Expert | Chatter | chatter-00ds00000009@uat-0419ryd236@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> | Condaraan, Jamima | jam | jamimacondaraan332@agentforce.com | | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | EPSI_OrfLam | EPSI | epsi_779fe3a11e60@agentforce.salesforce.com | | <input checked="" type="checkbox"/> | System Administrator |
| <input checked="" type="checkbox"/> | Mikaelson, Daniel | dmika | jamimacondaraan34789@gmail.com | Marketing | <input checked="" type="checkbox"/> | Platform 1 |
| <input checked="" type="checkbox"/> | Mikaelson, Kol | kmika | jamimacondaraan2356@gmail.com | Inventory | <input type="checkbox"/> | Platform 1 |
| <input checked="" type="checkbox"/> | Mikaelson, Niklaus | nmika | jamimacondaraan34545@gmail.com | Sales | <input checked="" type="checkbox"/> | Platform 1 |
| <input type="checkbox"/> | User Integration | intv | integration@00na40000009@uat.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> | User Security | sec | info@security00pk000009@uat.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |

At the bottom of the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Phase 4: Data Migration, Testing & Security

Profiles

The screenshot shows the 'Profiles' page under 'SETUP'. The title bar includes a blue icon with a person symbol and the word 'Profiles'. Below the title, it says 'Platform 1' and provides a brief description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.' A 'Help for this Page' link is also present.

Below the description, there are buttons for 'Edit', 'Clone', 'Delete', and 'View Users'.

The main area displays a table of profile details:

| Name | Platform 1 | Custom Profile |
|--------------|------------------|-------------------------------------|
| Name | Salesforce | <input checked="" type="checkbox"/> |
| User License | Salesforce | |
| Description | | |
| Created By | Jamima Condaraan | 11/22/2025, 6:54 AM |
| Modified By | Jamima Condaraan | 11/24/2025, 6:52 PM |

The screenshot shows the 'Users' page under 'SETUP'. The title bar includes a blue icon with a person symbol and the word 'Users'. Below the title, it says 'Platform 1' and provides a brief description: 'On this page you can create, view, and manage users.' A 'Help for this Page' link is also present.

Below the description, there are buttons for 'View' (All Users), 'Edit', and 'Create New View'. At the top right, there's a navigation bar with letters A through Z and an 'Other' link.

The main area displays a table of user records, identical to the one in the first screenshot:

| Action | Full Name | Alias | Username | Role | Active | Profile |
|--------------------------|--------------------|-------|--------------------------------|-----------|-------------------------------------|------------|
| <input type="checkbox"/> | Mikaelson, Daniel | dmika | jamimacondaraan34789@gmail.com | Marketing | <input checked="" type="checkbox"/> | Platform 1 |
| <input type="checkbox"/> | Mikaelson, Kol | kmika | jamimacondaraan2356@gmail.com | Inventory | <input type="checkbox"/> | Platform 1 |
| <input type="checkbox"/> | Mikaelson, Niklaus | nmika | jamimacondaraan34545@gmail.com | Sales | <input checked="" type="checkbox"/> | Platform 1 |

At the bottom of the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Roles and Role Hierarchy

The screenshot shows the 'Creating the Role Hierarchy' page. At the top, there's a 'SETUP Roles' header with a user icon. Below it, a section titled 'Your Organization's Role Hierarchy' displays a tree view of roles. The root node is 'Polytechnic University of the Philippines Santa Maria Bulacan Campus'. Underneath it are several roles: 'CEO', 'COO', 'Inventory', 'Marketing', and 'Sales'. Each of these has an 'Add Role' link next to it. To the right of the tree view is a 'Help for this Page' link and a 'Show in tree view' dropdown menu.

Inventory Role – Kol Mikaelson

This screenshot shows the 'Role Detail' page for the 'Inventory' role assigned to Kol Mikaelson. The 'Role' section at the top shows 'Inventory' as the label. The 'Role Detail' table includes fields for 'Label' (Inventory), 'This role reports to' (CEO), 'Modified By' (Jamima Condaraan), 'Opportunity Access' (Users can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities), and 'Case Access' (Users can edit all cases associated with accounts that they own, regardless of who owns the cases). The 'Sharing Groups' section indicates 'Role, Role and Internal Subordinates'. Below this is a 'Users in Inventory Role' table listing Kol Mikaelson with his full name, alias, and active status checked.

Sales Role – Niklaus Mikaelson

This screenshot shows the 'Role Detail' page for the 'Sales' role assigned to Niklaus Mikaelson. The 'Role' section shows 'Sales' as the label. The 'Role Detail' table includes fields for 'Label' (Sales), 'This role reports to' (CEO), 'Modified By' (Jamima Condaraan), 'Opportunity Access' (Users can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities), and 'Case Access' (Users can edit all cases associated with accounts that they own, regardless of who owns the cases). The 'Sharing Groups' section indicates 'Role, Role and Internal Subordinates'. Below this is a 'Users in Sales Role' table listing Niklaus Mikaelson with his full name, alias, and active status checked.

Marketing Role – Daniel Mikaelson

This screenshot shows the 'Role Detail' page for the 'Marketing' role assigned to Daniel Mikaelson. The 'Role' section shows 'Marketing' as the label. The 'Role Detail' table includes fields for 'Label' (Marketing), 'This role reports to' (CEO), 'Modified By' (Jamima Condaraan), 'Opportunity Access' (Users can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities), and 'Case Access' (Users can edit all cases associated with accounts that they own, regardless of who owns the cases). The 'Sharing Groups' section indicates 'Role, Role and Internal Subordinates'. Below this is a 'Users in Marketing Role' table listing Daniel Mikaelson with his full name, alias, and active status checked.

Permission Sets

sales permission set - HandsMen Customers

Permission Set
sales permission set

Video Tutorial | Help for this Page ?

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings HandsMen Customers

HandsMen Customers Edit

Tab Settings

| Available | Visible |
|--------------------------|----------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> i |

Object Permissions

| Permission Name | Enabled |
|--------------------|-------------------------------------|
| Read | <input checked="" type="checkbox"/> |
| Create | <input checked="" type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> |
| Delete | <input checked="" type="checkbox"/> |
| View All Records | <input type="checkbox"/> |
| Modify All Records | <input type="checkbox"/> |
| View All Fields | <input type="checkbox"/> |

Field Permissions

| Field Name | Field API Name | Read Access | Edit Access |
|------------------------|------------------|-------------------------------------|-------------------------------------|
| Created By | CreatedById | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Email | Email__c | <input type="checkbox"/> | <input type="checkbox"/> |
| FirstName | FirstName__c | <input type="checkbox"/> | <input type="checkbox"/> |
| FullName | FullName__c | <input type="checkbox"/> | <input type="checkbox"/> |
| HandsMen Customer Name | Name | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Last Modified | LastModifiedById | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

sales permission set – HandsMen Orders

Permission Set
sales permission set

Video Tutorial | Help for this Page ?

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings ▾ **HandsMen Orders** ▾

HandsMen Orders Edit

Tab Settings

| Available | Visible |
|--------------------------|----------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> i |

Object Permissions

| Permission Name | Enabled |
|--------------------|-------------------------------------|
| Read | <input checked="" type="checkbox"/> |
| Create | <input checked="" type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> |
| Delete | <input checked="" type="checkbox"/> |
| View All Records | <input type="checkbox"/> |
| Modify All Records | <input type="checkbox"/> |
| View All Fields | <input type="checkbox"/> |

Field Permissions

| Field Name | Field API Name | Read Access | Edit Access |
|----------------------|----------------------|-------------------------------------|-------------------------------------|
| Created By | CreatedById | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Email | Customer_Email__c | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| HandsMen Customer | HandsMen_Customer__c | <input type="checkbox"/> | <input type="checkbox"/> |
| HandsMen OrderNumber | Name | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| HandsMen Product | HandsMen_Product__c | <input type="checkbox"/> | <input type="checkbox"/> |
| Last Modified | LastModifiedById | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Inventory permission set – Inventories

Permission Set
Inventory permission set

Video Tutorial | Help for this Page ?

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings ▾ **Inventories** ▾

Inventories Edit

Tab Settings

| Available | Visible |
|--------------------------|------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/>  |

Object Permissions

| Permission Name | Enabled |
|--------------------|-------------------------------------|
| Read | <input checked="" type="checkbox"/> |
| Create | <input type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> |
| Delete | <input type="checkbox"/> |
| View All Records | <input type="checkbox"/> |
| Modify All Records | <input type="checkbox"/> |
| View All Fields | <input type="checkbox"/> |

Field Permissions

| Field Name | Field API Name | Read Access | Edit Access |
|------------------|---------------------|-------------------------------------|-------------------------------------|
| Created By | CreatedById | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| HandsMen Product | HandsMen_Product__c | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Inventory Number | Name | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Last Modified By | LastModifiedById | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Stock Quantity | Stock_Quantity__c | <input type="checkbox"/> | <input type="checkbox"/> |

Inventory permission set – HandsMen Products

Permission Set
Inventory permission set

Video Tutorial | Help for this Page ?

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings HandsMen Products

HandsMen Products Edit

Tab Settings

| Available | Visible |
|--------------------------|----------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> i |

Object Permissions

| Permission Name | Enabled |
|--------------------|-------------------------------------|
| Read | <input checked="" type="checkbox"/> |
| Create | <input type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> |
| Delete | <input type="checkbox"/> |
| View All Records | <input type="checkbox"/> |
| Modify All Records | <input type="checkbox"/> |
| View All Fields | <input type="checkbox"/> |

Field Permissions

| Field Name | Field API Name | Read Access | Edit Access |
|-----------------------|----------------|-------------------------------------|-------------------------------------|
| Created By | CreatedBy | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| HandsMen Product Name | Name | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Last Modified By | LastModifiedBy | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Owner | OwnerId | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Price | Price__c | <input type="checkbox"/> | <input type="checkbox"/> |
| SKU | SKU_c | <input type="checkbox"/> | <input type="checkbox"/> |

marketing permission set – HandsMen Customers

Permission Set
marketing permission set

Video Tutorial | Help for this Page ?

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings ▾ **HandsMen Customers** ▾

HandsMen Customers Edit

Tab Settings

| Available | Visible |
|--------------------------|-----------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> i |

Object Permissions

| Permission Name | Enabled |
|--------------------|-------------------------------------|
| Read | <input checked="" type="checkbox"/> |
| Create | <input type="checkbox"/> |
| Edit | <input type="checkbox"/> |
| Delete | <input type="checkbox"/> |
| View All Records | <input type="checkbox"/> |
| Modify All Records | <input type="checkbox"/> |
| View All Fields | <input type="checkbox"/> |

Field Permissions

| Field Name | Field API Name | Read Access | Edit Access |
|------------------------|----------------|-------------------------------------|-------------------------------------|
| Created By | CreatedBy | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Email | Email_c | <input type="checkbox"/> | <input type="checkbox"/> |
| FirstName | FirstName_c | <input type="checkbox"/> | <input type="checkbox"/> |
| FullName | FullName_c | <input type="checkbox"/> | <input type="checkbox"/> |
| HandsMen Customer Name | Name | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Last Modified | LastModifiedBy | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

marketing permission set – Marketing Campaigns

Permission Set
marketing permission set

Video Tutorial | Help for this Page ?

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings ▾ **Marketing Campaigns** ▾

Marketing Campaigns Edit

Tab Settings

| Available | Visible |
|--------------------------|----------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> i |

Object Permissions

| Permission Name | Enabled |
|--------------------|-------------------------------------|
| Read | <input checked="" type="checkbox"/> |
| Create | <input type="checkbox"/> |
| Edit | <input checked="" type="checkbox"/> |
| Delete | <input type="checkbox"/> |
| View All Records | <input type="checkbox"/> |
| Modify All Records | <input type="checkbox"/> |
| View All Fields | <input type="checkbox"/> |

Field Permissions

| Field Name | Field API Name | Read Access | Edit Access |
|---------------------------|----------------------|-------------------------------------|--------------------------|
| Created By | CreatedById | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| End Date | End_Date__c | <input type="checkbox"/> | <input type="checkbox"/> |
| HandsMen Customer | HandsMen_Customer__c | <input type="checkbox"/> | <input type="checkbox"/> |
| Last Modified By | LastModifiedById | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Marketing Campaign Number | Name | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Apex Triggers

Order Total Trigger

The screenshot shows the Salesforce Apex code editor with the tab 'OrderTotalTrigger.apxt' selected. The code implements a trigger on the HandsMen_Order__c object. It first collects product IDs from the trigger.new list, then queries the HandsMen_Product__c object to map products to their prices. Finally, it iterates over the trigger.new list again to calculate the total amount for each order based on the quantity and price.

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

Stock Deduction Trigger

The screenshot shows the Salesforce Apex code editor with the tab 'StockDeductionTrigger.apxt' selected. The code implements a trigger on the HandsMen_Order__c object. It first collects product IDs from the trigger.new list, then queries the Inventory__c object to get the current stock quantity for each product. Finally, it iterates over the trigger.new list again to deduct the quantity from the inventory and update the inventoriesToBeUpdated list.

```
trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
    Set<Id> productIds = new Set<Id>();
    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
         FROM Inventory__c
         WHERE HandsMen_Product__c IN :productIds]
    );
    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            for (Inventory__c inv : inventoryMap.values()) {
                if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
                    inv.Stock_Quantity__c -= order.Quantity__c;
                    inventoriesToUpdate.add(inv);
                    break;
                }
            }
        }
    }
    if (!inventoriesToUpdate.isEmpty()) {
        update inventoriesToUpdate;
    }
}
```

Order Trigger Handler

The screenshot shows a Salesforce code editor window with the tab 'OrderTriggerHandler.apxc' selected. The code implements a validation logic for a list of orders based on their status and quantity.

```
1 public class OrderTriggerHandler {
2     public static void validateOrderQuantity(List<HandsMen_Order__c> orderList) {
3         for (HandsMen_Order__c order : orderList) {
4             if (order.Status__c == 'Confirmed') {
5                 if (order.Quantity__c == null || order.Quantity__c <= 500) {
6                     order.Quantity__caddError('For Status "Confirmed", Quantity must be more than 500.');
7                 }
8             } else if (order.Status__c == 'Pending') {
9                 if (order.Quantity__c == null || order.Quantity__c <= 200) {
10                    order.Quantity__caddError('For Status "Pending", Quantity must be more than 200.');
11                }
12            } else if (order.Status__c == 'Rejection') {
13                if (order.Quantity__c == null || order.Quantity__c != 0) {
14                    order.Quantity__caddError('For Status "Rejection", Quantity must be 0.');
15                }
16            }
17        }
18        System.debug('All records validated successfully.');
19    }
20 }
21 }
```

Order Trigger

The screenshot shows a Salesforce code editor window with the tab 'OrderTrigger.apxt' selected. It defines a trigger named 'OrderTrigger' that runs before insert or update operations on the 'HandsMen_Order__c' object.

```
1 trigger OrderTrigger on HandsMen_Order__c (before insert, before update) {
2
3     if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {
4
5         OrderTriggerHandler.validateOrderQuantity(Trigger.new);
6
7     }
8
9 }
```

Creation of Test Classes

Creating a customer

Input

New HandsMen Customer

* = Required Information

Information

| | | | |
|--------------------------|----------------------|-------|------------------|
| * HandsMen Customer Name | Paolo Ocampo | Owner | Jamima Condaraan |
| Email | paolocampo@gmail.com | | |
| Phone | 09643918733 | | |
| Loyalty Status | Silver | | |
| FirstName | Paolo | | |
| LastName | Ocampo | | |
| Total Purchases | 200 | | |

Cancel Save & New Save

Output

HandsMen Threads

HandsMen Customer "Paolo Ocampo" was created. X

HandsMen Customer
Paolo Ocampo

New Contact | Edit

Related **Details**

| | |
|-----------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| HandsMen Customer Name | Owner |
| Paolo Ocampo |  Jamima Condaraan |
| Email | |
| paolocampo@gmail.com | |
| Phone | |
| 09643918733 | |
| Loyalty Status | |
| Silver | |
| FirstName | |
| Paolo | |
| LastName | |
| Ocampo | |
| FullName | |
| Paolo Ocampo | |
| Total Purchases | |
| 200 | |
| Created By | Last Modified By |
|  Jamima Condaraan , 11/28/2025, 1:11 AM |  Jamima Condaraan , 11/28/2025, 1:11 AM |

Creating an order

Input

New HandsMen Order

* = Required Information

Information

| | |
|----------------------|------------------|
| HandsMen OrderNumber | Owner |
| HandsMen Product | Jamima Condaraan |
| Velvet Vogue | |
| HandsMen Customer | |
| Paolo Ocampo | |
| Status | |
| Pending | |
| Quantity | |
| 201 | |
| Total Amount | |
| 50 | |
| * Customer Email | |
| paolocampo@gmail.com | |

Cancel **Save & New** **Save**

Output

The screenshot shows a software application window titled "HandsMen Threads". At the top, there is a green notification bar with a checkmark icon and the text "HandsMen Order \"O-0013\" was created." Below the notification bar, the main title is "HandsMen Order O-0013". On the right side of the header, there are two buttons: "New Contact" and "Edit".

The main content area is divided into two sections: "Related" and "Details". The "Details" section is currently active and displays the following information:

| | | | |
|----------------------|---------------------------------------|------------------|---------------------------------------|
| HandsMen OrderNumber | O-0013 | Owner | Jamima Condaraan |
| HandsMen Product | Velvet Vogue | | |
| HandsMen Customer | Paolo Ocampo | | |
| Status | Pending | | |
| Quantity | 201 | | |
| Total Amount | 20,100 | | |
| Customer Email | paolocampo@gmail.com | | |
| Created By | Jamima Condaraan, 11/28/2025, 1:19 AM | Last Modified By | Jamima Condaraan, 11/28/2025, 1:19 AM |

Creating a new Product

Input

New HandsMen Product

* = Required Information

Information

| | | | |
|-------------------------|-----------------|-------|------------------|
| * HandsMen Product Name | Burgundy Slacks | Owner | Jamima Condaraan |
| SKU | KQWQ193NA | | |
| Price | \$24 | | |
| * Stock Quantity | 320 | | |

Cancel **Save & New** **Save**

Output

HandsMen Threads

HandsMen Product "Burgundy Slacks" was created.

HandsMen Product
Burgundy Slacks

New Contact

| | |
|-------------------------------------------------------|-------------------------------------------------------------|
| Related | Details |
| HandsMen Product Name Burgundy Slacks | Owner Jamima Condaraan |
| SKU KQWQ193NA | |
| Price \$24 | |
| Stock Quantity 320 | |
| Created By Jamima Condaraan 11/28/2025, 1:23 AM | Last Modified By Jamima Condaraan 11/28/2025, 1:23 AM |

Creating an order item

Input

New Inventory

* = Required Information

Information

Inventory Number

* HandsMen Product

Burgundy Slacks

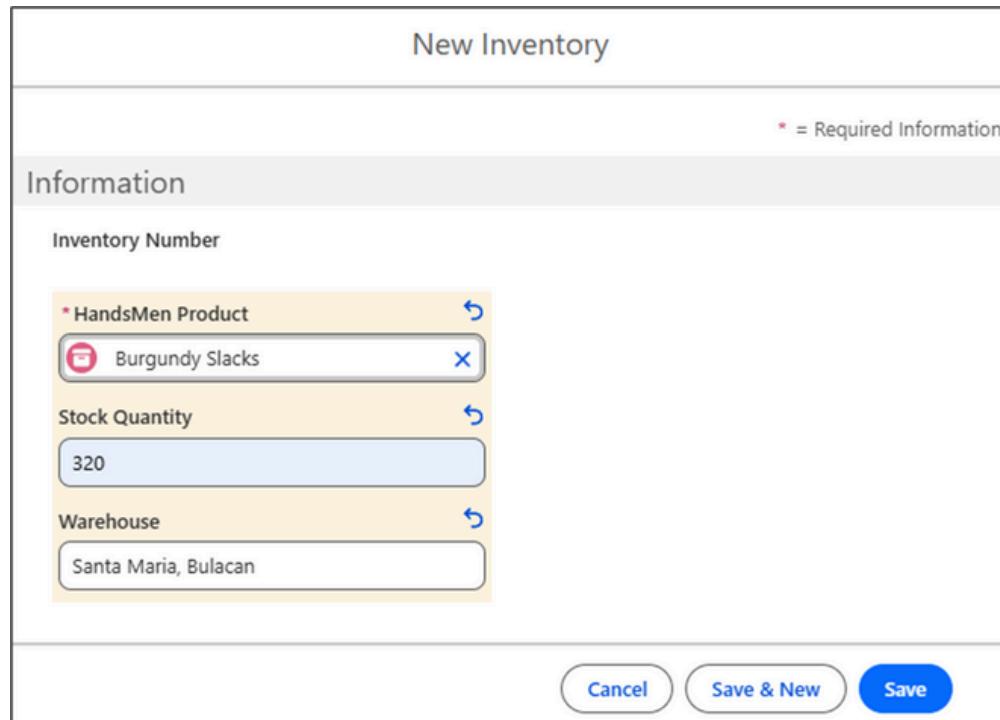
Stock Quantity

320

Warehouse

Santa Maria, Bulacan

Cancel Save & New Save



Output

HandsMen Threads

Inventory I -0012

Related Details

Inventory Number
I -0012

HandsMen Product
[Burgundy Slacks](#)

Stock Quantity
320

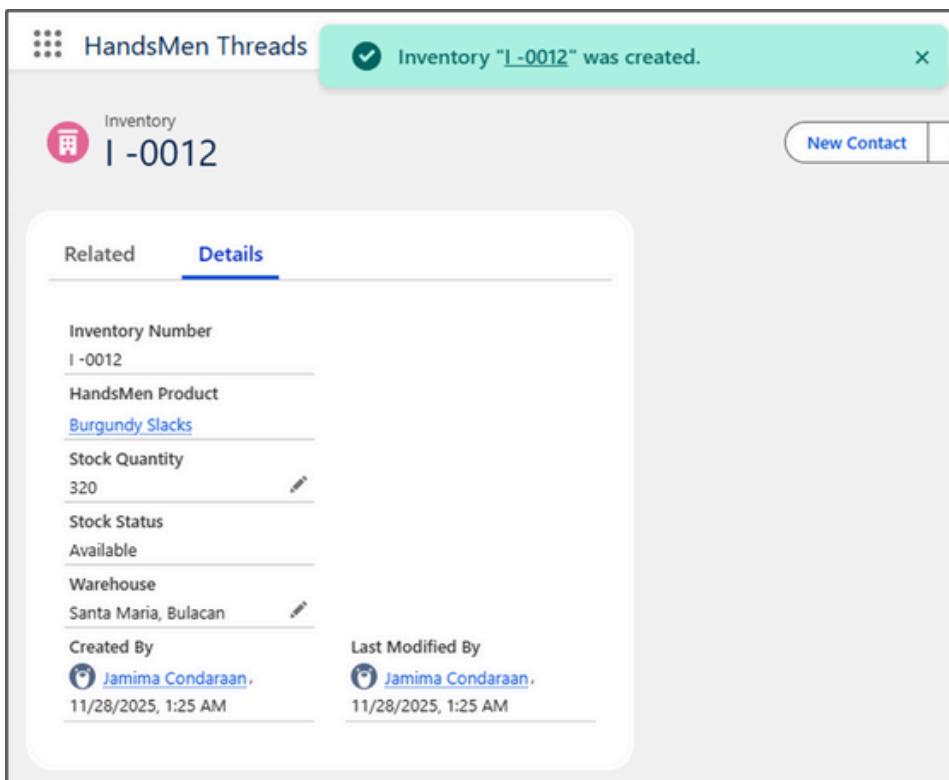
Stock Status
Available

Warehouse
Santa Maria, Bulacan

Created By
 [Jamima Condaraan](#),
11/28/2025, 1:25 AM

Last Modified By
 [Jamima Condaraan](#),
11/28/2025, 1:25 AM

New Contact



Testing Record Triggered Flow (Email Alerts)

Order Confirmation

The screenshot shows the Salesforce Flow Builder interface. On the left, a flow diagram titled "Record-Triggered Flow" is displayed. It starts with a "Start" step, followed by a trigger for "HandsMen Order" updated records. This triggers an "order confirmation" email alert action, which then concludes at an "End" step. On the right, the configuration details for the flow are shown:

- Configure Start:** Set to "HandsMen Order".
- Configure Trigger:** Triggered when "A record is updated".
- Set Entry Conditions:** A condition requiring the "Status" field to be "Confirmed".
- When to Run the Flow for Updated Records:** Set to "Only when a record is updated to meet the condition requirements".

The screenshot shows an email message from Salesforce. The subject is "Your Order has been Confirmed". The message body contains the following text:

Dear John,
Your order #O-0006 has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team

Low Stock Alert Email

The screenshot shows a Record-Triggered Flow named "Record-Triggered Flow" starting with "Inventory". The flow triggers when "A record is created or updated". It has one action step: "low stock alert" (Email Alert). The flow ends with a red "End" symbol.

Configure Start:

- Select Object: Inventory
- Trigger the Flow Where:
 - A record is created
 - A record is updated
 - A record is created or updated**
 - A record is deleted

Configure Trigger:

- Trigger the Flow When:
 - A record is created
 - A record is updated
 - A record is created or updated**
 - A record is deleted

Set Entry Conditions:

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the Only when a record is updated to meet the condition requirements option for When to Run the Flow for Updated Records.

Condition Requirements: All Conditions Are Met (AND)

| Field | Operator | Value |
|------------------|-----------|-------|
| # Stock Quantity | Less Than | 5 |

When to Run the Flow for Updated Records:

- Every time a record is updated and meets the condition requirements**
- Only when a record is updated to meet the condition requirements

Low Stock Alert Email

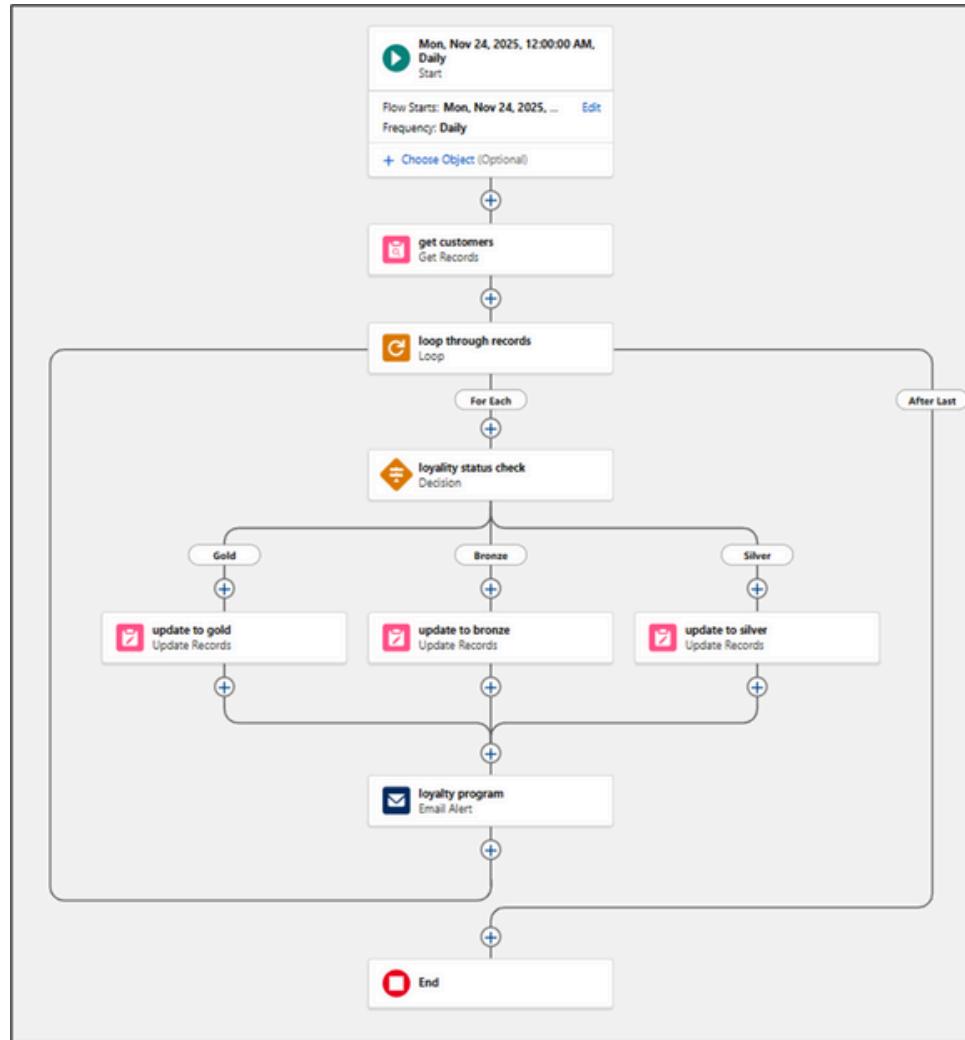
Jamima Condaraan via rq0co8v3ac3h.gk-fr6yluat.can96.bnc.salesforce.com
to me ▾

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

[Report as not spam](#)

Dear Inventory Manager,
This is to inform you that the stock for the following product is running low:
Product Name: Burgundy Slacks
Current Stock Quantity: 2
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory Monitoring System

Loyalty Program Email



Outcomes

For each path the automation can take, create an outcome. For each outcome, specify the conditions that must be met for the automation to take that path.

| OUTCOME ORDER | OUTCOME DETAILS | Delete Outcome |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Gold | * Outcome Label: Gold * Outcome API Name: Gold | |
| Bronze | | |
| Silver | Condition Requirements to Execute Outcome: All Conditions Are Met (AND) * Resource: # ...ugh records > Total Purchases Operator: Greater Than Value: 1000 | |

Phase 5:

Deployment, Documentation & Maintenance

Deployment Strategy

- Direct deployment to production environment
- Comprehensive testing before deployment
- User training and testing along with proper documentation

Description of Maintenance and Monitoring

- Regular system health checks
- Performance monitoring for batch jobs
- Error log review and resolution
- User support and troubleshooting

Documentation of Troubleshooting Approach

- Debug logs for real-time issue identification
- Systematic testing methodology
- User feedback incorporation
- Continuous improvement process

Conclusion

This project shows how Salesforce can be used to develop solutions that automate customer relationship management, order processing, inventory tracking, and marketing activities. A CRM can benefit businesses in many ways. We have created a solution that is effective for administrators by utilizing the entire stack of Salesforce capabilities, from point-and-click Flows and security controls to programmatic Apex triggers and batch jobs. Now that HandsMen Threads has a platform that will not only simplify operations but also develop and change with the company for years to come, it truly embodies the idea of working smarter, not harder.

Future Enhancements

- AI Integration: Einstein Analytics for customer behavior prediction
- Chatbot Implementation: Automated customer service and support
- Mobile Application: Custom mobile experience for sales team
- Advanced Analytics: Predictive inventory management