

# **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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**November 2025**

## **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 process.

**Left Screenshot: Sign up for your Developer Edition**

This screenshot shows the initial sign-up form. Fields include:

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

A checkbox for agreeing to the Main Services Agreement is checked. Below it, a note about reCAPTCHA is present, followed by a "Sign Me Up" button.

**Right Screenshot: Welcome to your Developer Edition**

This screenshot shows the welcome message for the new user, Jamima. 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: There's just one more step. Use the following link to reset the password for your Developer Edition. This link expires in 24 hours, with a "Reset Password" button.
- A URL: <https://orgfarm-be583b625a-dev-ed.develop.my.salesforce.com>
- A note: Here's the username for your Developer Edition: [jamimacondaraan832@agentforce.com](mailto: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 note: Again, welcome to Salesforce!

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

This screenshot shows the Salesforce Setup interface with the following elements:

- Welcome, Jamima**: The main heading.
- Manage and customize Salesforce from Setup. Browse suggestions, explore features, and more.**: A descriptive subtitle.
- Achieve Popular Business Goals**: A section with three cards:

  - 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. Button: 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. Button: 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. Button: Keep Going.

- DISPLAY DENSITY**: A sidebar setting with "Compact" selected.
- OPTIONS**: A sidebar setting with "Switch to Salesforce Classic" and "Add Username" options.

## 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		<a href="#">Edit</a>	<a href="#">Clone</a>
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
<a href="#">Edit</a> <a href="#">Clone</a>			

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

## HandsMen Order Validation Rule – Total\_Amount

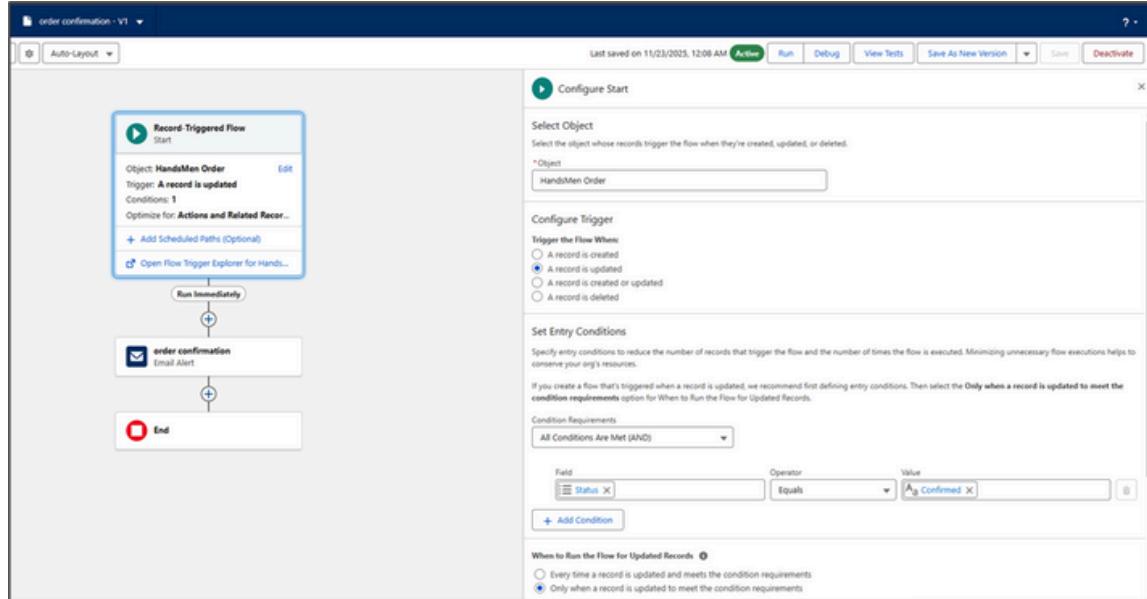
HandsMen Order Validation Rule [Help for this Page](#)

[Back to HandsMen Order](#)

Validation Rule Detail		<a href="#">Edit</a>	<a href="#">Clone</a>
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
<a href="#">Edit</a> <a href="#">Clone</a>			

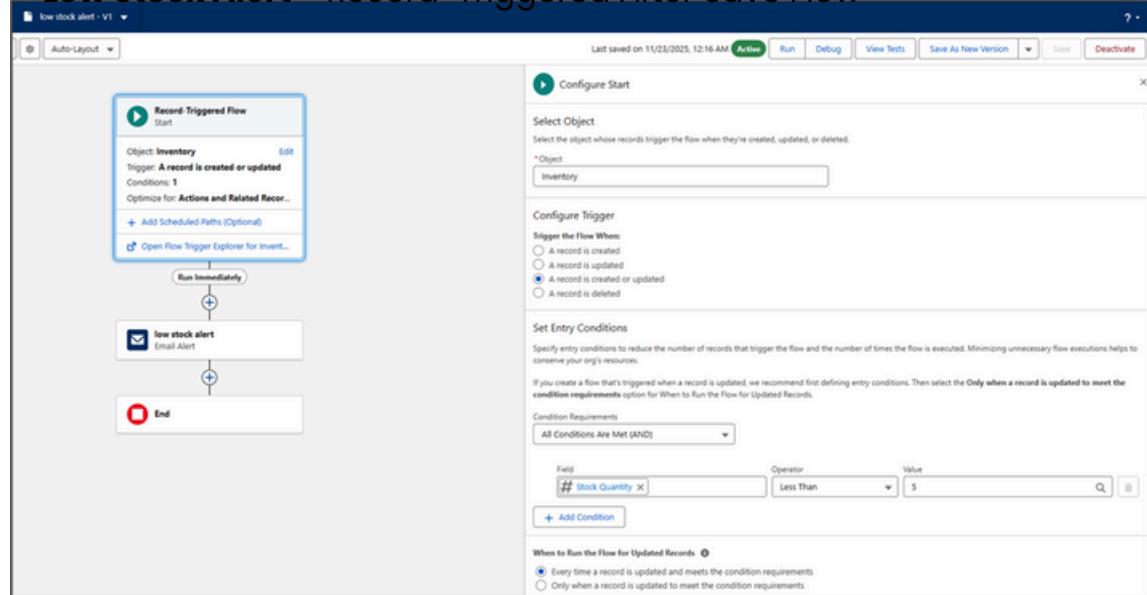
## Automation

### Order Confirmation Flow - Record-Triggered After Save Flow



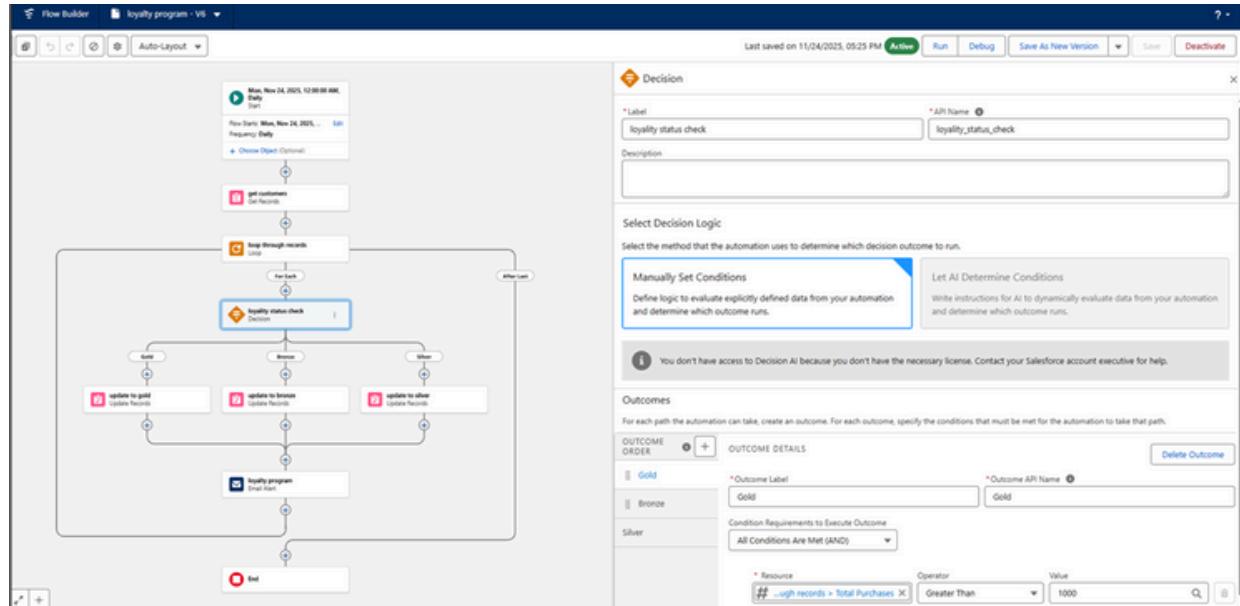
An automated flow for alerting the customer that their order is confirmed.

### 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.

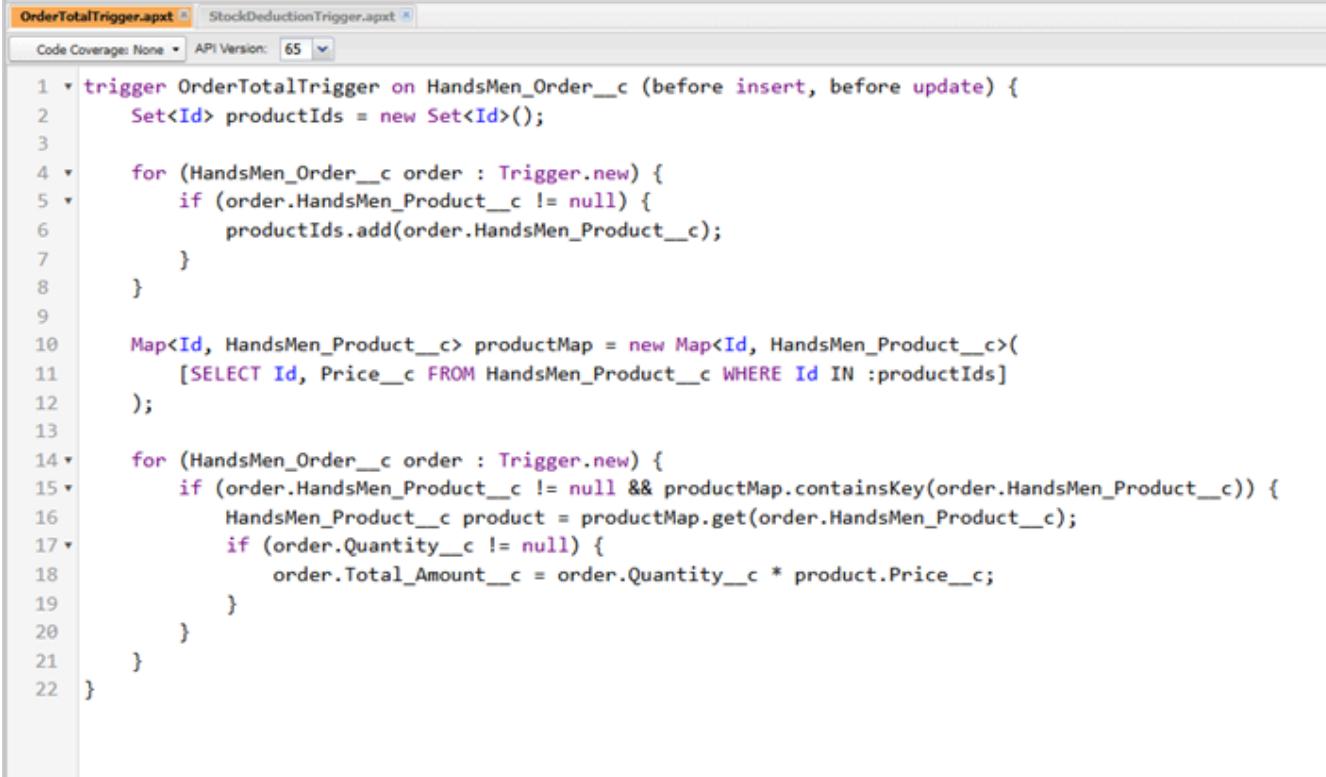
## Loyalty Program Email – Schedule-Triggered Flow



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

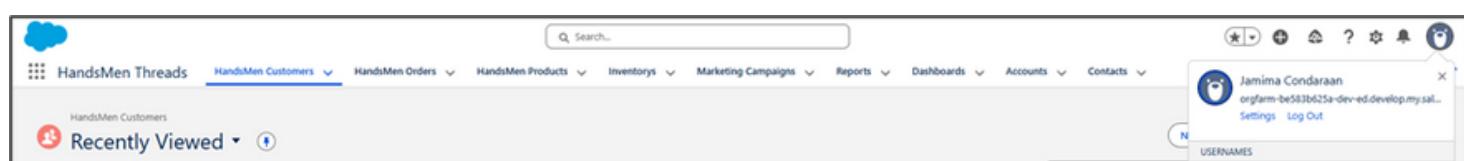
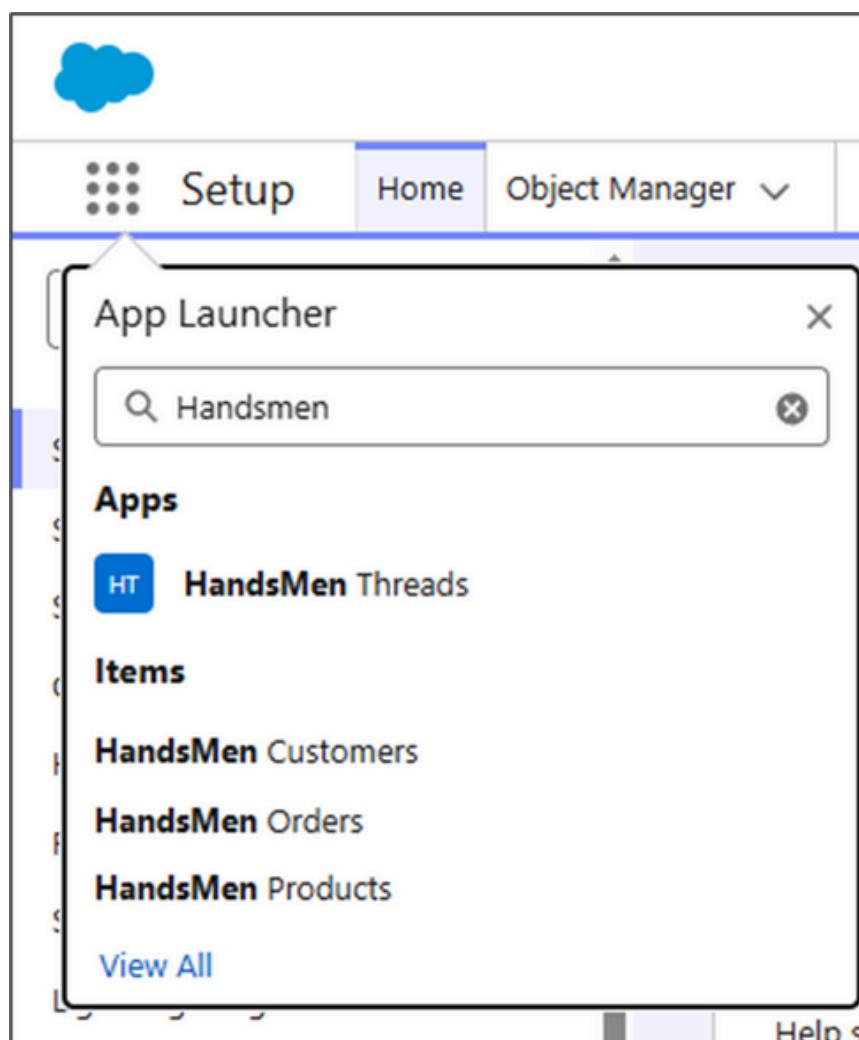
```
trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
    Set<Id> productIds = new Set<Id>();
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }
    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 Product List screen. At the top, there are navigation tabs: HandsMen Threads, HandsMen Customers, HandsMen Orders, HandsMen Products (which is selected and highlighted in blue), and More. Below the tabs, there's a search bar with the placeholder "Search this list..." and a filter section with "All" selected. A toolbar at the top right includes buttons for New, Import, Change Owner, Printable View, and Assign Label. The main area displays a grid of 6 items, each with a checkbox and a downward arrow icon. The items are sorted by HandsMen Product Name. The list includes:

Rank	Product Name	Action
1	Elegance Shoes	Downward arrow
2	Luxe Palette	Downward arrow
3	T-shirt cloth	Downward arrow
4	Urban Pants	Downward arrow
5	Varsity jacket	Downward arrow
6	Velvet Vogue	Downward arrow

## HandsMen Products – Product Details

The screenshot shows the HandsMen Product Details screen for the product "Urban Pants". The top navigation bar is identical to the Product List screen. The main area features a title "HandsMen Product" and the product name "Urban Pants". Below the title, there are two tabs: "Related" and "Details", with "Details" being the active tab. The "Details" tab contains the following fields:

Field	Value
HandsMen Product Name	Urban Pants
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

At the top right of the details area, there are buttons for "New Contact", "Edit", and "New Opportunity".

## Inventorys List

The screenshot shows the 'Inventorys' list page. At the top, there are navigation tabs: 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'Inventorys' (which is underlined in blue), and 'More'. Below the tabs, there's a search bar with the placeholder 'Search this list...' and a filter section with 'All' selected. A message indicates '6 items • Sorted by Inventory Number • Updated a few seconds ago'. There are several sorting and filtering icons. The main area displays a table with 6 rows, each containing an inventory item with its number and a checkbox. The items listed are: 1 I-0002, 2 I-0004, 3 I-0005, 4 I-0008, 5 I-0009, and 6 I-0011.

## Inventorys – Inventory Item Details

The screenshot shows the details for a specific inventory item, I-0009. The top navigation bar is identical to the previous screen. The main content area shows the item number 'I -0009' and a 'Details' tab selected. Below the tab, there are several data fields: 'Inventory Number' (I-0009), 'HandsMen Product' (Urban Pants), 'Stock Quantity' (250), 'Stock Status' (Available), 'Warehouse' (empty), 'Created By' (Jamima Condaraan, 11/24/2025, 11:35 PM), and 'Last Modified By' (Jamima Condaraan, 11/24/2025, 11:35 PM). Action buttons at the top right include 'New Contact', 'Edit', and 'New Opportunity'.

## 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' setup page. At the top, there's a blue header bar with the 'SETUP' button and a 'Users' icon. Below it, the page title is 'All Users'. A sub-header says 'On this page you can create, view, and manage users.' and 'To get more licenses, use the Your Account app. [Let's Go](#)'. There are buttons for 'View' (All Users), 'Edit', and 'Create New View'. A navigation bar at the top right includes links for 'A', 'B', 'C', 'D', 'E', 'F', 'G', 'H', 'I', 'J', 'K', 'L', 'M', 'N', 'O', 'P', 'Q', 'R', 'S', 'T', 'U', 'V', 'W', 'X', 'Y', 'Z', 'Other', and a search bar.

The main content 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"/>	EPS_OrfFarm	EPS	eps_779fe3a1e60@agentfarm.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	jamimacondaraan345@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 Salesforce 'Profiles' setup page. At the top, there's a blue header bar with the 'SETUP' button and a 'Profiles' icon. Below it, the page title is 'Platform 1'. A sub-header says '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.' and 'If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' There are buttons for 'Edit', 'Clone', 'Delete', and 'View Users'.

The main content 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

At the bottom of the table are buttons for 'Edit', 'Clone', 'Delete', and 'View Users'.

The screenshot shows the Salesforce 'Users' setup page. At the top, there's a blue header bar with the 'SETUP' button and a 'Users' icon. Below it, the page title is 'Platform 1'. A sub-header says 'On this page you can create, view, and manage users.' and 'To get more licenses, use the Your Account app. [Let's Go](#)'. There are buttons for 'View' (All Users), 'Edit', and 'Create New View'. A navigation bar at the top right includes links for 'A', 'B', 'C', 'D', 'E', 'F', 'G', 'H', 'I', 'J', 'K', 'L', 'M', 'N', 'O', 'P', 'Q', 'R', 'S', 'T', 'U', 'V', 'W', 'X', 'Y', 'Z', 'Other', and a search bar.

The main content area displays a table of user records:

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	jamimacondaraan345@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' button next to it. To the right of the tree view is a 'Help for this Page' link and a 'Show in tree view' dropdown.

## Inventory Role – Kol Mikaelson

This screenshot shows the 'Inventory Role – Kol Mikaelson' page. It includes a 'Role Detail' section with fields for 'Label' (Inventory), 'This role reports to' (CEO), 'Modified By' (Jamima Condaraan), 'Opportunity Access' (Users can edit opportunities), and 'Case Access' (Users can edit cases). Below this is a 'Users in Inventory Role' table with one entry: Kol Mikaelson (Full Name: Kol Mikaelson, Alias: kmika, Username: jamimacondaraan2256@gmail.com, Active status checked).

## Sales Role – Niklaus Mikaelson

This screenshot shows the 'Sales Role – Niklaus Mikaelson' page. The 'Role Detail' section shows 'Label' (Sales), 'This role reports to' (CEO), 'Modified By' (Jamima Condaraan), 'Opportunity Access' (Users can edit opportunities), and 'Case Access' (Users can edit cases). The 'Users in Sales Role' table shows one user: Niklaus Mikaelson (Full Name: Niklaus Mikaelson, Alias: nnika, Username: jamimacondaraan0345@gmail.com, Active status checked).

## Marketing Role – Daniel Mikaelson

This screenshot shows the 'Marketing Role – Daniel Mikaelson' page. The 'Role Detail' section shows 'Label' (Marketing), 'This role reports to' (CEO), 'Modified By' (Jamima Condaraan), 'Opportunity Access' (Users can edit opportunities), and 'Case Access' (Users can edit cases). The 'Users in Marketing Role' table shows one user: Daniel Mikaelson (Full Name: Daniel Mikaelson, Alias: dmika, Username: jamimacondaraan34789@gmail.com, 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"/> <span>i</span>

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, it queries the HandsMen\_Product\_\_c object to map product IDs to their prices. Finally, it iterates through the trigger.new list again to calculate the total amount for each order based on its quantity and the mapped 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, it queries the Inventory\_\_c object to get the stock quantity for each product. Finally, it iterates through the trigger.new list again to deduct the quantity from the inventory for confirmed orders.

```
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 trigger handler for the HandsMen\_Order\_\_c object. It iterates through a list of orders, checking their status and quantity. For 'Confirmed' status, it ensures quantity is greater than 500; for 'Pending', it ensures quantity is greater than 200; and for 'Rejection', it ensures quantity is 0. It also includes a debug statement at the end.

```
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 on the HandsMen\_Order\_\_c object. The trigger logic calls the validateOrderQuantity method from the OrderTriggerHandler class.

```
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	 <a href="#">Jamima Condaraan</a>
Email	
<a href="mailto:paolocampo@gmail.com">paolocampo@gmail.com</a>	
Phone	
<a href="#">09643918733</a>	
Loyalty Status	
Silver	
FirstName	
Paolo	
LastName	
Ocampo	
FullName	
Paolo Ocampo	
Total Purchases	
200	
Created By	Last Modified By
 <a href="#">Jamima Condaraan</a> , 11/28/2025, 1:11 AM	 <a href="#">Jamima Condaraan</a> , 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

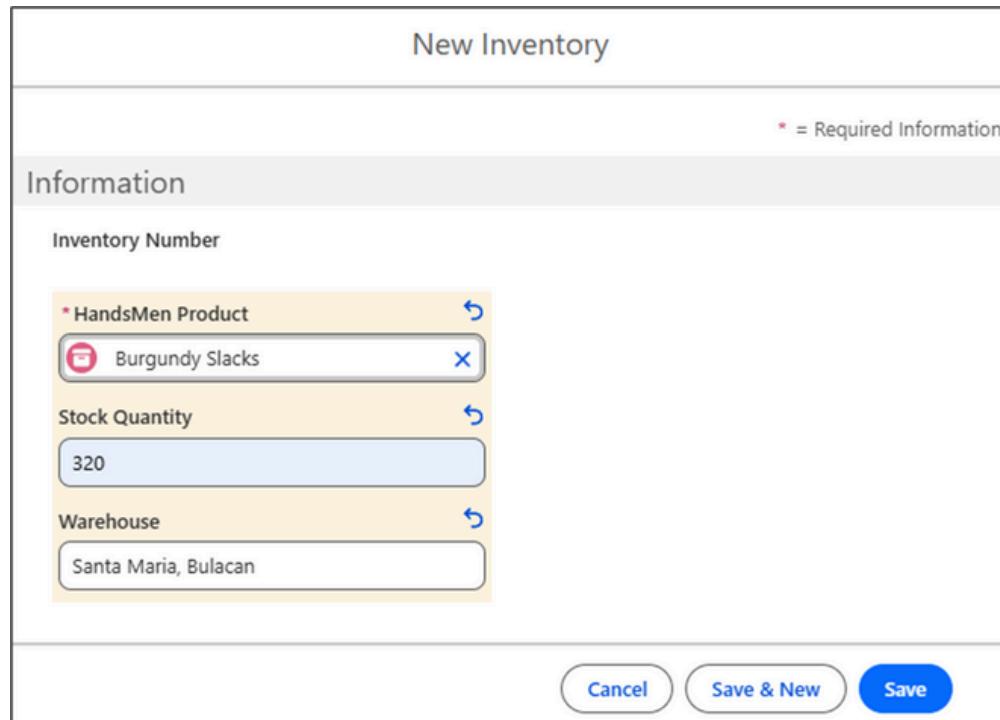
Stock Quantity

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

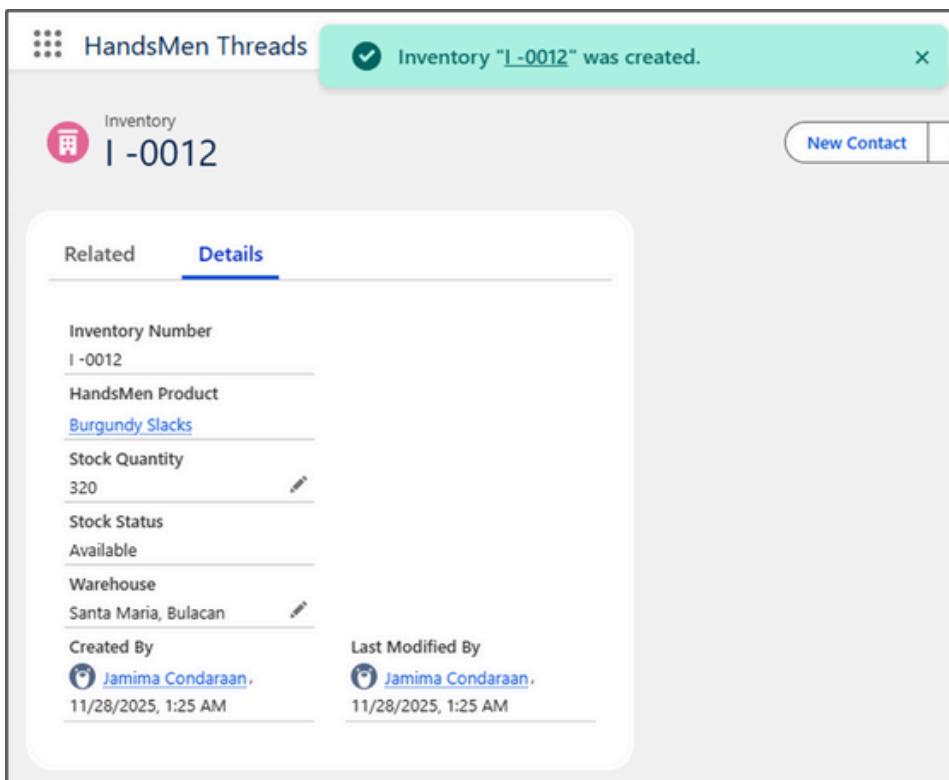
Stock Status  
Available

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 for a "Record-Triggered Flow". The flow starts with a trigger for "HandsMen Order" when it is updated. The flow then branches to an "order confirmation" step, which is an "Email Alert". Finally, the flow ends. The configuration details for the trigger include:

- Object:** HandsMen Order
- Trigger:** A record is updated
- Conditions:** 1
- Optimize for:** Actions and Related Records

The "Configure Start" section shows the selected object is "HandsMen Order". The "Configure Trigger" section specifies "A record is updated" as the trigger condition. The "Set Entry Conditions" section includes a condition requirement where "Status" equals "Confirmed". The "When to Run the Flow for Updated Records" section is 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 is from "Jamima Condaraan" and was sent on "Mon 24 Nov, 16:25 (4 days ago)". The message content is as follows:

Your Order has been Confirmed

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 configuration dialog for "Configure Start" shows "Inventory" selected as the object. The "Configure Trigger" section shows "A record is created or updated" selected. The "Set Entry Conditions" section shows a condition: "# Stock Quantity < 5". The "When to Run the Flow for Updated Records" section shows "Every time a record is updated and meets the condition requirements" selected.

### Low Stock Alert Email

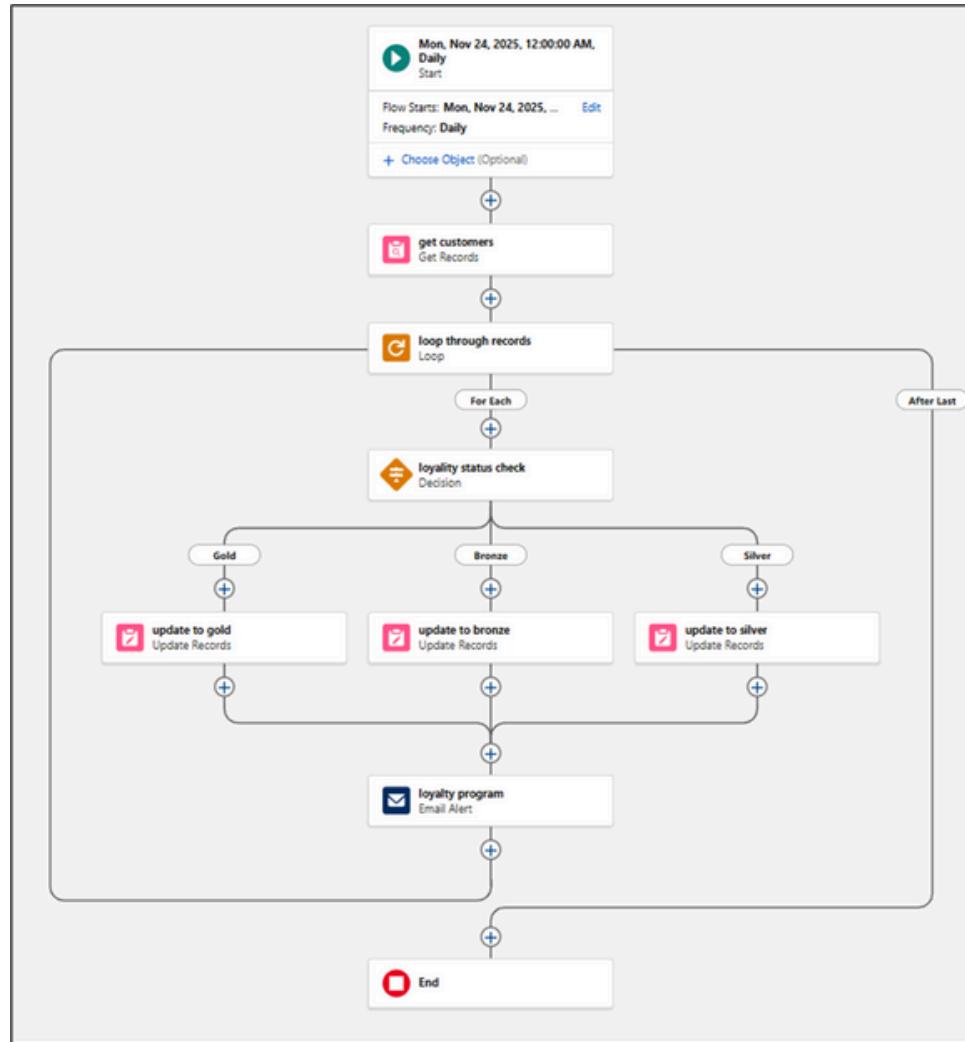
Jamima Condaraan via rq0co8v3ac3h.gk-fr6yluat.can96.bnc.salesforce.com  
to me ▾

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