

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

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Project Overview

This Project is a salesforce based system that is developed to streamline customer management, order processing, and inventory tracking. It automates tasks such as order total calculation and stock deduction to reduce errors and improve efficiency. The system addresses the business need for organized data handling, faster workflows, and stronger customer engagement.

Objectives

The goal of HandsMen Threads is to connect sales, inventory, and marketing into a single environment where teams can work with accurate and updated information. The system cuts down on manual steps through automation, improves team coordination, and helps the business respond faster and make better decisions.

Phase 1: Requirement Analysis & Planning

- ***Business Requirements:***

HandsMen Threads needed a unified platform to handle and manage customer information, orders, inventory, and marketing. The goal was to automate manual processes, reduce errors, and improve coordination across teams.

- ***Project Scope and Objectives:***

The project covers custom objects for Customers, Orders, Products, Inventory, and Marketing Campaigns, along with automations for computing order totals, updating inventory when an order is confirmed, and tracking loyalty points to support daily business tasks.

- ***Data Model and Security Model:***

The data model connects “Customers”, “Orders”, and “Products” through lookup and master-detail relationships to ensure accurate record tracking. “Inventory” updates automatically when orders are confirmed. The security model applies roles, profiles, and permission sets to manage user access and protect sensitive data.

- ***Stakeholders Mapping:***

The system involves the admin for configuration and security, the Sales Team for managing customers and orders, the Inventory Team for stock monitoring, the Marketing Team for campaigns, and Management for reviewing dashboards and making decisions.

- ***Execution Roadmap:***

The project moved from requirement gathering and system design to configuration and automation setup, followed by testing, user training, and final deployment with ongoing monitoring.

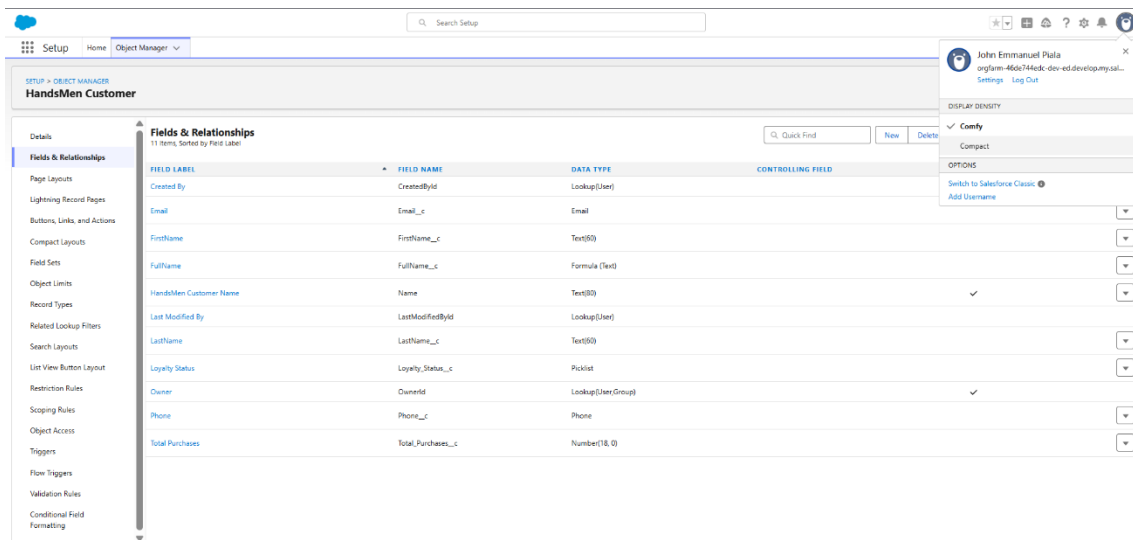
Phase 2: Salesforce Development – Backend & Configuration

Setup environment & DevOps workflow:

A Salesforce developer sandbox was used for configuring and testing the system.

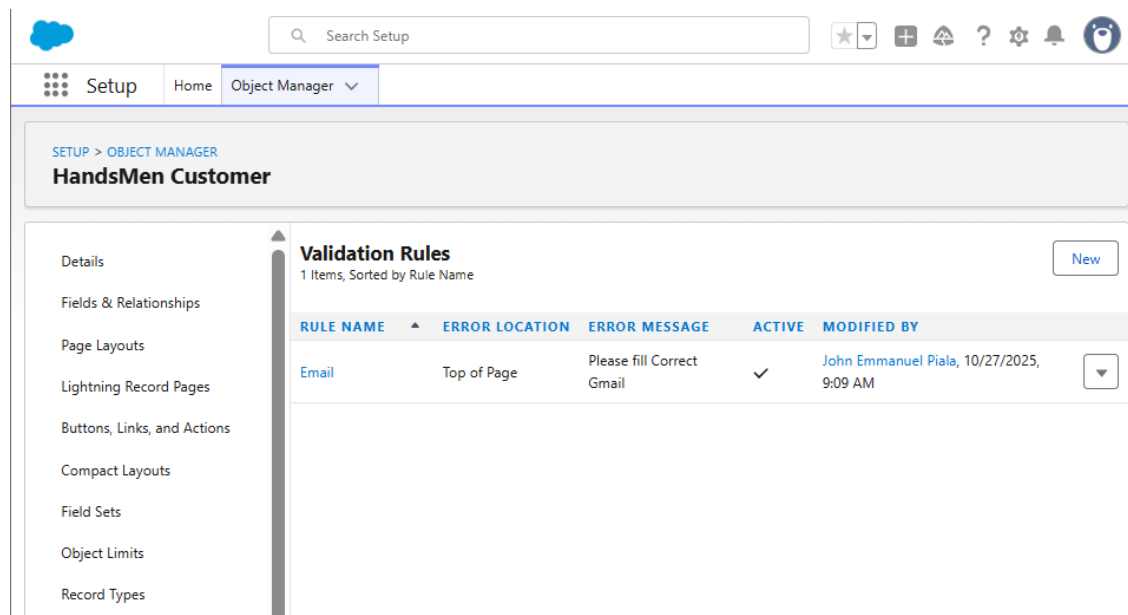
Customization of Objects, Fields, Validation Rules, Automation:

HandsMen Customer



This screenshot shows the 'Fields & Relationships' configuration page for the 'HandsMen Customer' object in Salesforce. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area displays a table of fields with columns for FIELD LABEL, FIELD NAME, DATA TYPE, and CONTROLLING FIELD. A 'Quick Find' search bar and 'New' and 'Delete' buttons are at the top right of the table. A user profile dropdown for John Emmanuel Pila is visible in the top right corner.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
Email	Email__c	Email	
FirstName	FirstName__c	Text(50)	
FullName	FullName__c	Formula (Text)	
HandsMen Customer Name	Name	Text(80)	✓
Last Modified By	LastModifiedById	Lookup(User)	
LastName	LastName__c	Text(50)	
Loyalty Status	Loyalty_Status__c	Picklist	
Owner	OwnerId	Lookup(User/Group)	✓
Phone	Phone__c	Phone	
Total Purchases	Total_Purchases__c	Number(18, 0)	



This screenshot shows the 'Validation Rules' configuration page for the 'HandsMen Customer' object in Salesforce. The left sidebar is the same as the previous screenshot. The main content area displays a table of validation rules with columns for RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. A 'New' button is at the top right of the table.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email	Top of Page	Please fill Correct Gmail	✓	John Emmanuel Pila, 10/27/2025, 9:09 AM

Needs to be a valid gmail account only and nothing else

HandsMen Product

Setup

Home

Object Manager

Search Setup

John Emmanuel Pila

org1am-46de744edc-dev-ed.develop.my.saf...

Settings Log Out

DISPLAY DENSITY

Comfy

Compact

Switch to Salesforce Classic

Add Username

SETUP > OBJECT MANAGER

HandsMen Product

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

7 Items, Sorted by Field Label

Quick Find

New

Delete

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
HandsMen Product Name	Name	Text(80)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User, Group)	
Price	Price__c	Currency(18, 0)	
SKU	SKU__c	Text(60)	
Stock Quantity	Stock_Quantity__c	Number(18, 0)	

HandsMen Order

Setup

Home

Object Manager

Search Setup

John Emmanuel Pila
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Settings Log Out

DISPLAY DENSITY
✓ Comfy
Compact
OPTIONS
Switch to Salesforce Classic
Add Username

Details

Fields & Relationships
10 Items, Sorted by Field Label

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
Customer Email	Customer_Email__c	Email	
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)	✓
HandsMen OrderNumber	Name	Auto Number	✓
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)	✓
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User Group)	✓
Quantity	Quantity__c	Number(18, 0)	
Status	Status__c	Picklist	
Total Amount	Total_Amount__c	Number(18, 0)	

Setup

Home

Object Manager

Search Setup

John Emmanuel Pila
org1am-46de744edc-dev-ed.develop.my.saf...
Settings Log Out

SETUP > OBJECT MANAGER
HandsMen Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Validation Rules

1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Total_Amount	Total Amount	Please Enter Correct Amount	✓	John Emmanuel Pila, 10/27/2025, 9:06 AM

If the formula returns 0 the save is blocked until the user fixes the Quantity in their order

Inventory

The screenshot shows the Salesforce Setup interface for the 'Inventory' object. The left sidebar contains a list of setup options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, Conditional Field, and Formatting. The main content area is titled 'Fields & Relationships' and shows a table of 7 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, and CONTROLLING FIELD. The items are: Created By (CreatedById, Lookup(User)), HandsMen Product (HandsMen_Product__c, Master-Detail(HandsMen Product)), Inventory Number (Name, Auto Number), Last Modified By (LastModifiedById, Lookup(User)), Stock Quantity (Stock_Quantity__c, Number(18, 0)), Stock Status (Stock_Status__c, Formula (Text)), and Warehouse (Warehouse__c, Text(50)). A 'New' button and a 'Delete' button are visible. A user profile dropdown is open in the top right corner, showing the user's name 'John Emmanuel Pila', email 'onglam-46de744edc-dev-ed.develop.my.saf...', and options to 'Settings' and 'Log Out'. The 'DISPLAY DENSITY' is set to 'Compact', and there are options to 'Switch to Salesforce Classic' and 'Add Username'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
HandsMen Product	HandsMen_Product__c	Master-Detail(HandsMen Product)	
Inventory Number	Name	Auto Number	
Last Modified By	LastModifiedById	Lookup(User)	
Stock Quantity	Stock_Quantity__c	Number(18, 0)	
Stock Status	Stock_Status__c	Formula (Text)	
Warehouse	Warehouse__c	Text(50)	

The screenshot shows the Salesforce Setup interface for the 'Inventory' object, specifically the 'Validation Rules' section. The left sidebar is the same as the previous screenshot, with 'Validation Rules' selected. The main content area is titled 'Validation Rules' and shows 1 item, sorted by Rule Name. There is a 'New' button in the top right corner. The table has columns for RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The item is: Stock_Quantity (Top of Page, the inventory count is never less than zero, Active, Modified by John Emmanuel Pila, 10/27/2025, 9:07 AM).

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Stock_Quantity	Top of Page	the inventory count is never less than zero.	✓	John Emmanuel Pila, 10/27/2025, 9:07 AM

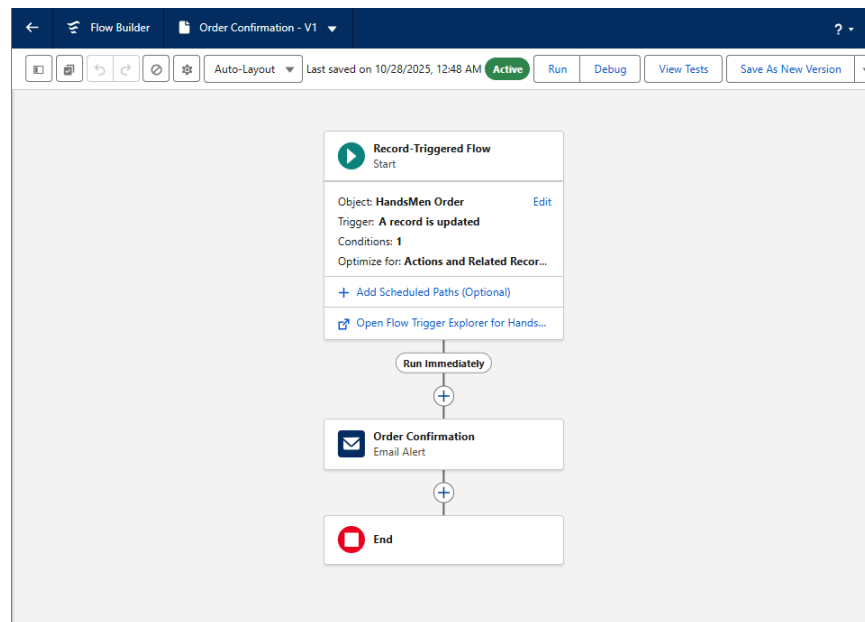
Cannot order a product if stock quantity is 0 to avoid overselling and displays an error message as seen in this screenshot

Marketing Campaign

The screenshot shows the Salesforce Setup interface for the 'Marketing Campaign' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, Conditional Field, and Formatting. The main content area is titled 'Fields & Relationships' and shows a table of fields for the Marketing Campaign object. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, and CONTROLLING FIELD. The fields listed are: Created By (CreatedById, Lookup(User)), End Date (End_Date__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)), and Start Date (Start_Date__c, Date). On the right side, there is a user profile for John Emmanuel Pila and a 'DISPLAY DENSITY' dropdown menu set to 'Compact'.

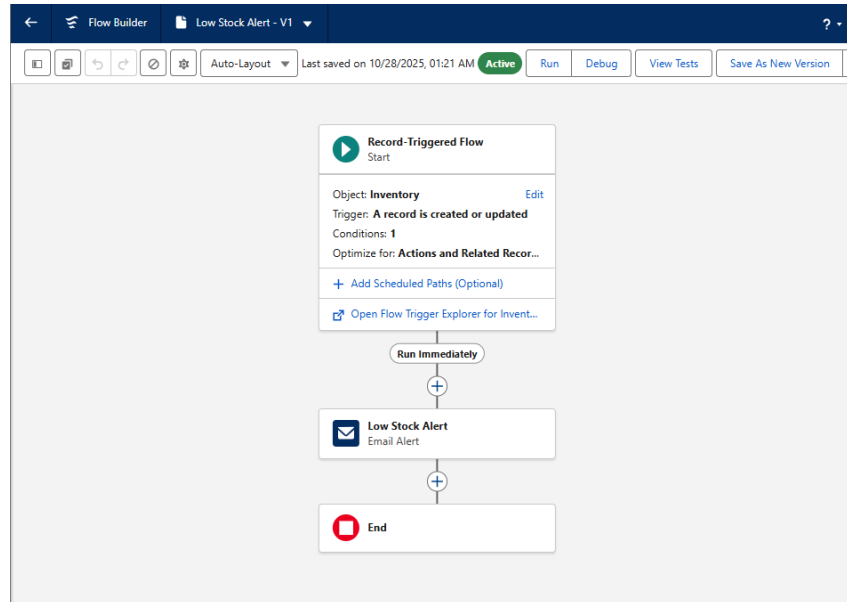
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
End Date	End_Date__c	Date	
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)	
Last Modified By	LastModifiedById	Lookup(User)	
Marketing Campaign Number	Name	Auto Number	
Owner	OwnerId	Lookup(User:Group)	
Start Date	Start_Date__c	Date	

Order Confirmation Flow



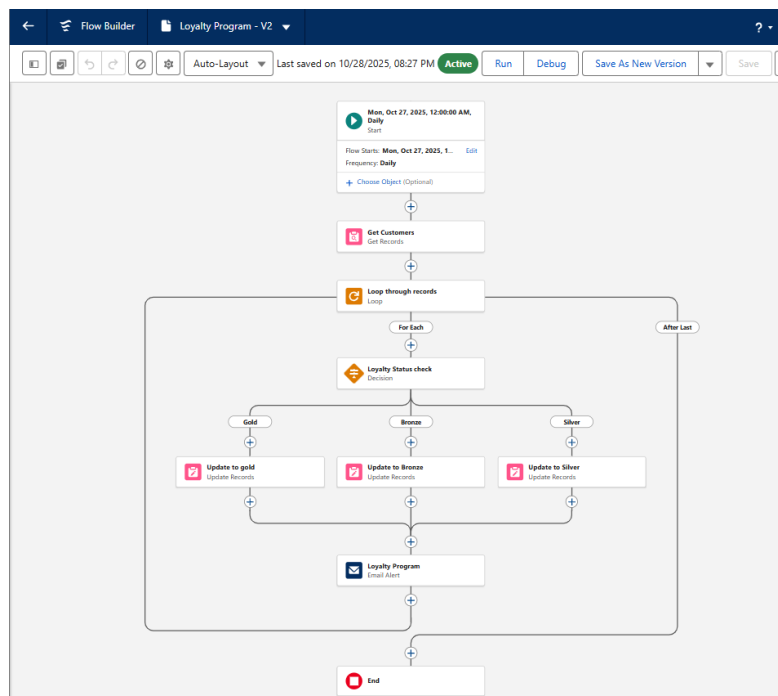
Automatically sends an email notification whenever an order status is changed from pending to confirmed since the trigger is “A record is updated”

Low Stock Alert Flow



Automatically sends an email notification whenever the stock quantity is below 5.

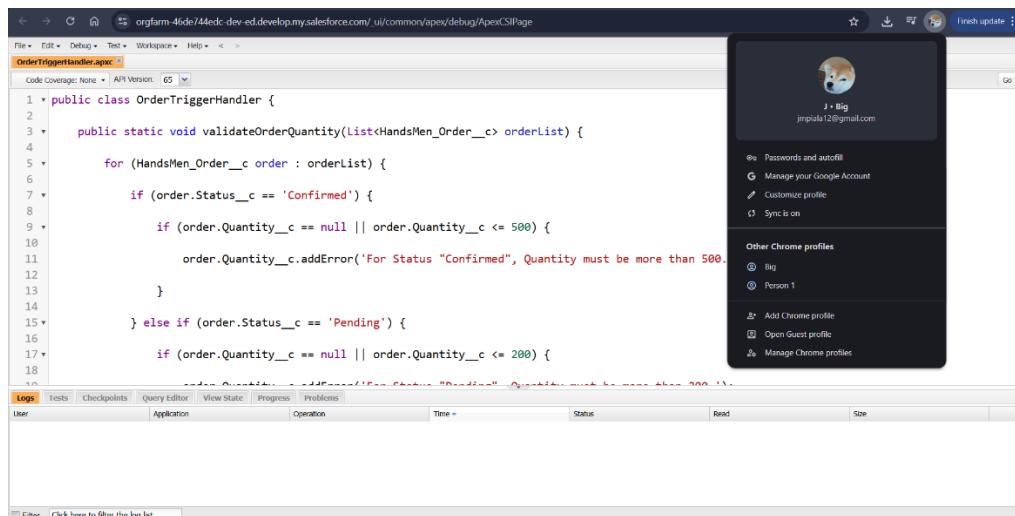
Loyalty Program Flow



Daily loops through customer records to check their total purchases and updates the loyalty status depending on the count (Gold if +1000, Bronze if 0-500, else Silver)

Apex Classes and/or Triggers:

OrderTotalTrigger



This apex trigger automatically calculates the total order amount by multiplying product price by quantity.

StockDeductionTrigger



This apex trigger happens once the order is confirmed, it deducts the ordered quantity from the product's stock.

InventoryBatchJob

```
1 global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {
2
3     global Database.QueryLocator start(Database.BatchableContext BC) {
4
5         return Database.getQueryLocator(
6
7             'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'
8
9         );
10    }
11
12    global void execute(Database.BatchableContext BC, List<SObject> records) {
13
14        List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
15
16        // Cast SObject list to Product__c list
17
18        for (SObject record : records) {
19
20            HandsMen_Product__c product = (HandsMen_Product__c) record;
21
22            product.Stock_Quantity__c += 50; // Restock logic
23
24            productsToUpdate.add(product);
25
26        }
27
28        if (!productsToUpdate.isEmpty()) {
29
30            try {
31
32                update productsToUpdate;
33
34            } catch (DmlException e) {
35
36                System.debug('Error updating inventory: ' + e.getMessage());
37
38            }
39
40        }
41
42    }
43
44    global void finish(Database.BatchableContext BC) {
45
46        System.debug('Inventory Sync completed');
47
48    }
49 }
```

This apex class finds products with low stock, adds more quantity to restock them, and updates the records automatically on a scheduled basis.

Phase 3: UI/UX Development & Customization

Lightning App setup:

A custom lightning app was built via App Manager to group Customers, Orders, Products, Inventory, and Campaigns in one workspace.

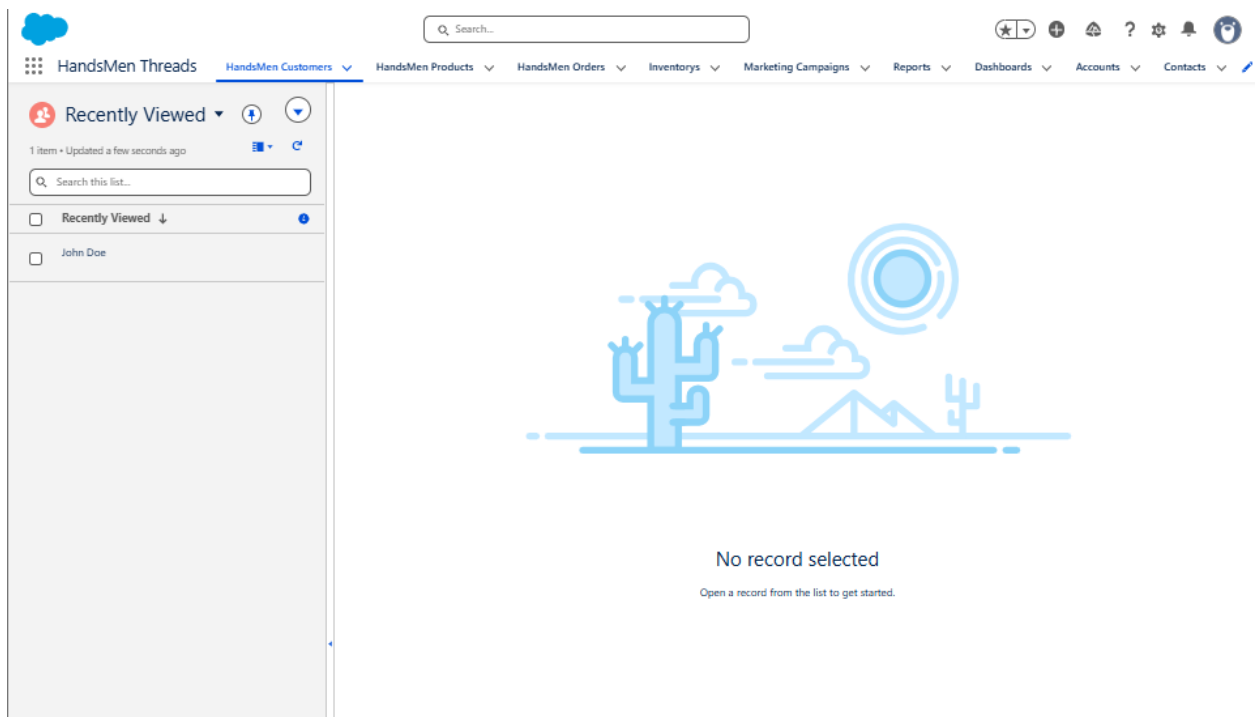
Page Layouts, Dynamic Forms:

Page layouts and dynamic forms were configured per role so that users can only view fields and sections relevant or related to their work.

User Management:

Users were created and assigned roles and profiles to control access and permissions inside the system.

HandsMen Threads



Phase 4: Data Migration, Testing & Security

Data Migration:

Sample customer, product, and order records were imported using the Data Import Wizard to prepare the system for testing.

Security:

- Field history tracking was enabled on key objects to monitor changes.
- Duplicate and matching rules were configured to prevent repeated entries.
- Profiles, roles with hierarchy, permission sets, and sharing rules were set up to control access and visibility for different users.

Testing:

Triggers and batch jobs are tested with Apex classes while functional tests check inventory updates, total amount validation, batch restocking, and duplicate customer prevention with screenshots documenting the results

Phase 5: Deployment, Documentation & Maintenance

Deployment strategy:

The system is moved from the developer sandbox to the live environment manually by recreating configurations and updates directly in the production org, with careful testing in the sandbox to ensure changes work correctly before going live.

Maintenance and troubleshooting approach:

The system is maintained by regularly monitoring user activity, data accuracy, and automation processes, while common issues are resolved using documented troubleshooting steps, including checking validation rules, flows, and trigger logic.

Conclusion:

The HandsMen Threads Salesforce integrates customer management, orders, inventory, and marketing into one platform, giving teams the information they need without having to chase data across different systems. The automation handles the repetitive tasks, while validation rules makes sure that the important information is correct and accurate. The system also manages stock updates, order confirmations, and loyalty tracking automatically, reducing errors and saving time for the team and by organizing daily operations and keeping information flowing smoothly, the system supports both everyday tasks and long-term growth, making workflows more efficient and helping teams work together more effectively.

Future Enhancements:

- *Integrate a customer support chatbot to handle inquiries efficiently.*
- *Add AI based product recommendations to boost sales.*
- *Expand automation to further reduce manual tasks and speed up workflows.*
- *Integrate simple analytics to track the top selling products and customer trends.*