

Bulacan State University

College of Information and Communications Technology

Bachelor of Science in Information Technology

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

Documented by:

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BSIT 3E – G1

Capstone Project Documentation

Submitted in partial fulfillment of the requirements for completing the

Capstone Project

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

Project Overview

The HandsMen Threads Salesforce CRM project aims to streamline data management and enhance customer relations in the fashion industry. It features a robust data model that ensures accurate and consistent information, automated order confirmations, a dynamic loyalty program that rewards repeat customers, proactive stock alerts for timely restocking, and scheduled bulk order updates to maintain inventory and financial accuracy. These features improve operational efficiency and support informed business decisions.

Objectives

The main goals of implementing Salesforce CRM for HandsMen Threads are:

- Centralize and organize customer, order, and inventory data for accurate reporting.
- Automate business processes to reduce manual work and errors.
- Enhance customer satisfaction through timely communication and loyalty updates.
- Maintain data integrity and secure access to sensitive information.
- Enable scalable workflows for future business growth.

Phase 1: Requirement Analysis & Planning

❖ Understanding Business Requirements

- The business needs a unified system to manage customer information, orders, and inventory efficiently.
- Current manual workflows lead to inconsistent data and slower service responses.
- Automation is needed to enhance customer engagement and streamline loyalty tracking.
- Real-time monitoring of stock levels is required to prevent shortages and ensure timely restocking.

❖ Defining Project Scope and Objectives

- Build a customized Salesforce CRM suited for fashion retail operations.
- Integrate automation features for order notifications, loyalty updates, and stock alerts.
- Establish secure and accurate data management processes.
- Enable better decision-making through real-time reports and system dashboards.

❖ Design Data Model and Security Model

- Custom Objects: HandsMen_Customer__c, HandsMen_Order__c, HandsMen_Product__c, Inventory__c, Marketing_Campaign__c.

- Relationships: Orders linked to Customers and Products; Inventory tied to Orders and Warehouse.
- Automated data updates through Flows, Triggers, and Batch Jobs.
- Defined roles and profiles: Sales Manager, Inventory Manager, Marketing Team.
- Role-based access for object visibility and data editing.
- Validation rules and sharing settings for data accuracy and confidentiality.

❖ Stakeholders Mapping

Stakeholder	Role	Responsibility
Project Developer	Salesforce Admin/Developer	Handles system configuration, process automation, and customizations
Business Owner	Client/User	Shares business needs and confirms that the system meets expectations
Project Advisor	Faculty/Reviewer	Evaluates progress and provides guidance on implementation quality

❖ Execution Roadmap

- Requirement Analysis and Project Planning
- Salesforce Environment Setup and Configuration
- Interface Customization and Functional Testing
- Data Migration and Security Implementation
- System Deployment and Post-Launch Documentation

Phase 2: Salesforce Development – Backend & Configurations

❖ Setup Environment & DevOps Workflow

- Salesforce Developer Edition was configured with separate **sandbox environments** for testing and deployment.
- Version control and change tracking managed using Salesforce Change Sets.


❖ Customization of Objects, Fields, Validation Rules & Automation

- **Objects Created:** Customers, Orders, Products, Inventory, Marketing Campaigns.
- **Flows:**

- *Order Confirmation Flow* – triggers on order confirmation.
 - *Stock Alert Flow* – triggers when stock < 5.
 - *Loyalty Status Flow* – runs daily to update customer loyalty status.
-
- **Approval Process:** Configured for high-value order validation.
 - **Process Builder:** Linked with record updates for automation continuity.

❖ **Apex Classes, Triggers & Asynchronous Apex**

- **Apex Triggers:**
 - *Update Order Total* – auto-calculates totals upon order save.
 - *Stock Deduction* – reduces stock after each confirmed order.
 - *Loyalty Status Update* – adjusts loyalty points based on purchase history.



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👤

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

HandsMen Customers

Recently Viewed

NewImportChange OwnerAssign Label

4 items • Updated a few seconds ago

🔍

📄

🔄


📌

✎

🗑️

⌵

	HandsMen Customer Name	
1	<input type="checkbox"/> lol	⌵
2	<input type="checkbox"/> iza	⌵
3	<input type="checkbox"/> lala	⌵
4	<input type="checkbox"/> lan	⌵



🔍

📄

🔗

?

⚙️

🔔

👤

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

HandsMen Customer

New

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

Validation Rules

1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email	Top of Page	Please fill Correct Gmail	✓	Lheriza Miranda, 11/9/2025, 6:43 AM

SetupHomeObject Manager

Search Setup

Object Manager

4 Items, Sorted by Label

inventory

Schema Builder

Create

Label	API Name	Type	Description	Last Modified	Deployed
Inventory	Inventory__c	Custom Object		11/9/2025	✓
Inventory Item Reservation	InventoryItemReservation	Standard Object			
Inventory Reservation	InventoryReservation	Standard Object			
Web Store Inventory Source	WebStoreInventorySource	Standard Object			

SetupHomeObject Manager

Search Setup

Object Manager

1 Items, Sorted by Label

marketing

Schema Builder

Create

Label	API Name	Type	Description	Last Modified	Deployed
Marketing Campaign	Marketing_Campaign__c	Custom Object		11/9/2025	✓

SetupHomeObject Manager

Search Setup

Object Manager

3 Items, Sorted by Label

handsmen

Schema Builder

Create

Label	API Name	Type	Description	Last Modified	Deployed
HandsMen Customer	HandsMen_Customer__c	Custom Object		11/6/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		11/6/2025	✓
HandsMen Product	HandsMen_Product__c	Custom Object		11/6/2025	✓

SetupHomeObject Manager

Q Search Setup

Q tabs

▼ User Interface

▼ Rename Tabs and Labels

▼ Tabs

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

SETUP

Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit Del	HandsMen Customers	People	
Edit Del	HandsMen Orders	Shopping Cart	
Edit Del	HandsMen Products	Box	
Edit Del	Inventories	Building	
Edit Del	Marketing Campaigns	Mail	

No Web Tabs have been defined

No Visualforce Tabs have been defined

Lightning Component Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit	Get Started with AppExchange	Report	
Edit	Get Started with Data Cloud	Map	
Edit	Get Started with MuleSoft	Report	
Edit	Get Started with Salesforce DX	Building Block	
Edit	Welcome	Search	

https://domains-57a5c3d3d1-d0e and domains-00a1d0e-sapto.com/lightning/setup/tabs/customTabs/home

SetupHomeObject Manager

Q Search Setup

SETUP > OBJECT MANAGER

HandsMen Order

Details

Fields & Relationships

10 Items, Sorted by Field Label

Q Quick FindNewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Email	Customer_Email__c	Email		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		✓
HandsMen Order Name	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)		

SetupHomeObject Manager

Q Search Setup

SETUP > OBJECT MANAGER

Marketing Campaign

Details

Fields & Relationships

7 Items, Sorted by Field Label

Q Quick FindNewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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		

Setup

Home

Object Manager

Q

Search Setup

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

Fields & Relationships

7 Items, Sorted by Field Label

Q

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

Setup

Home

Object Manager

Q

Search Setup

SETUP > OBJECT MANAGER

Inventory

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

Fields & Relationships

7 Items, Sorted by Field Label

Q

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
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(60)			▼

Setup

Home

Object Manager

Q

Search Setup

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

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

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	✓	Lheriza Miranda, 11/9/2025, 6:40 AM	▼

SetupHomeObject Manager

Q Search Setup

Setup > OBJECT MANAGER

Inventory

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

Validation Rules

1 Items, Sorted by Rule Name

RULE NAME

ERROR LOCATION

ERROR MESSAGE

ACTIVE

MODIFIED BY

Stock_Quantity

Top of Page

the inventory count is never less than zero.

✓

Lheriza Miranda, 11/9/2025, 6:41 AM

SetupHomeObject Manager

Q Search Setup

Setup > OBJECT MANAGER

HandsMen Customer

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

Fields & Relationships

11 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL

FIELD NAME

DATA TYPE

CONTROLLING FIELD

INDEXED

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)

SETUP

Apex Classes

Apex Classes

Help for this Page

Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Lightning Platform.

Percent of Apex Used: 0.09%

You are currently using 5,547 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Estimate your organization's code coverage

Compile all classes

View: All Create New View

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 All

Action	Name ↑	Namespace Prefix	Developer Console	New	Generate from WSDL	Run All Tests	Schedule Apex	Last Modified By	Has Trace Flags
Edit Security	DeveloperEditionUtils	devedapp	64.0	Active		164		OrgFarm.EPIC, 11/4/2025, 12:56 AM	<input type="checkbox"/>
Edit	DeveloperEditionUtilsTest	devedapp	64.0	Active		261		OrgFarm.EPIC, 11/4/2025, 12:56 AM	<input type="checkbox"/>
Edit Del Security	InventoryBatchJob		65.0	Active		975		Lheriza Miranda, 11/9/2025, 8:49 AM	<input type="checkbox"/>
Edit Security	PostInstallScript	devedapp	64.0	Active		2,175		OrgFarm.EPIC, 11/4/2025, 12:56 AM	<input type="checkbox"/>
Edit	PostInstallScriptTest	devedapp	64.0	Active		781		OrgFarm.EPIC, 11/4/2025, 12:56 AM	<input type="checkbox"/>

Dynamic Apex Classes

Dynamic Apex extends your programming reach by interacting with Lightning Platform components.

View: All Create New View

Class Name ↑	Namespace Prefix	Api Version	Created By	Last Modified By
No records to display.				

SETUP

Apex Triggers

Apex Triggers

This page allows you to view and modify all the triggers in your organization. To create a new trigger, navigate to the appropriate sObject triggers page.

Percent of Apex Used: 0.09%

You are currently using 5,547 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Collapse all triggers

View: All Create New View

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 All

Action	Name	Namespace Prefix	sObject Type	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del	OrderTotalTrigger		HandsMen_Order	65.0	Active	848	Lheriza Miranda 11/9/2025, 8:38 AM	<input type="checkbox"/>
Edit Del	OrderTrigger		HandsMen_Order	65.0	Active	62	Lheriza Miranda 11/9/2025, 8:47 AM	<input type="checkbox"/>
Edit Del	PurchaseAdder		HandsMen_Order	65.0	Active	2,468	Lheriza Miranda 11/10/2025, 1:28 AM	<input type="checkbox"/>
Edit Del	StockDeductionTrigger		HandsMen_Order	65.0	Active	1,194	Lheriza Miranda 11/9/2025, 8:42 AM	<input type="checkbox"/>

Phase 3: UI/UX Development & Customization

- Setting up the Lightning App using App Manager for Customers, Orders, Products, Inventory, and Campaigns.
- Designing page layouts and interactive forms that change depending on user roles with Dynamic Forms.
- Configuring user management for admins, sales, inventory, and marketing staff with roles, profiles, and permission sets.
- Creating reports and dashboards to show sales performance, top-selling products, inventory status, and customer loyalty.
- Optionally building Lightning Web Components (LWC) to enhance interface functionality and display dynamic information.
- Setting up Lightning Pages for easier navigation and a clean, organized interface.
- Including screenshots of every interface element, page layout, report, dashboard, and component no exceptions.

Setup Home Object Manager

Q user

Users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

Users Management Settings

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Enhanced Chat User Verification

Interface

Action Link Templates

Actions & Recommendations

App Menu

Console Settings

Console Workspace Page Loading Preference

Loaded Console Tab Limit

Custom Labels

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New User

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 All

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	chatter	chatter.00000000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter First User
Edit	EPIC_OrgAdmin	OEPIG	epic.1ah73241115@orgform.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Michaelon_Daniel	dmika	michaela739@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform 1
Edit	Michaelon_Kel	kmika	michaela55@gmail.com	Inventory	<input type="checkbox"/>	Platform 1
Edit	Michaelon_Niklaus	nmika	michaela123@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1
Edit	Miranda_Lheriza	mlh	michaela330@gmail.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	intbro	integration00000000000000000000000000000000@ecsfonad.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	ssc	insolvthesscurity00000000000000000000000000000000@ecsfonad.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

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 All

SETUP

Classic Email Templates

Unfiled Public Classic Email Templates

Help for this Page

Classic Email Template Availability

[Expand]

Folder Unfiled Public Classic Email Templates Create New Folder

<Previous Page | Next Page>

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 | All

Action	Email Template Name	New Template	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	Appointment for Unauthenticated User using Appointment Types - For Amazon Chime		Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon Chime.	sfccadm	11/4/2025
Edit Del	Appointment for Unauthenticated User using Appointment Types - For third party		Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with third party video applications.	sfccadm	11/4/2025
Edit Del	Appointment for Unauthenticated User using Engagement Channels For Amazon Chime		Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon Chime.	sfccadm	11/4/2025
Edit Del	Appointment for Unauthenticated User using Engagement Channels For third party		Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications.	sfccadm	11/4/2025
Edit Del	Canceled Service Appointment Confirmation Email		Custom	✓	Email Template to confirm canceling of a service appointment.	sfccadm	11/4/2025
Edit Del	Commerce Reorder Portal Invitation		Custom	✓	Invite a contact to a Commerce Reorder Portal.	autoprnc	11/4/2025
Edit Del	Group Service Appointments Enrolment Confirmation Email		Custom	✓	Email Template to confirm enrollment of an attendee to a Group service appointment.	sfccadm	11/4/2025
Edit Del	Low Stock Alert		Text	✓		mib	11/9/2025
Edit Del	Loyalty Program Email		HTML	✓		mib	11/10/2025
Edit Del	Marketing Product Inquiry Response		Text	✓	Standard email response to website product inquiries	OEPIIC	11/4/2025
Edit Del	Order Confirmation Email		HTML	✓		mib	11/9/2025
Edit Del	Rescheduled Service Appointment Confirmation Email		Custom	✓	Email Template to confirm rescheduling of a service appointment.	sfccadm	11/4/2025
Edit Del	Sales New Customer Email		Text	✓	Email to new customers	OEPIIC	11/4/2025
Edit Del	Scheduled Service Appointment Confirmation Email		Custom	✓	Email Template to confirm scheduling of a service appointment.	sfccadm	11/4/2025
Edit Del	Scheduler Payments Payment Reminder for Service Appointment Email		Custom	✓	Email Template to remind customers to pay for their service appointment.	sfccadm	11/4/2025
Edit Del	Scheduler Payments Service Appointment Cancellation Email		Custom	✓	Email Template to confirm the cancellation of a paid service appointment.	sfccadm	11/4/2025
Edit Del	Scheduler Payments Service Appointment Confirmation Email		Custom	<input type="checkbox"/>	Email Template to confirm scheduling of a paid service appointment.	sfccadm	11/4/2025
Edit Del	Scheduler Payments Service Appointment Confirmation Email for Guest Users		Custom	<input type="checkbox"/>	Email Template to confirm scheduling of a paid service appointment for guest users.	sfccadm	11/4/2025
Edit Del	Scheduler Payments Service Appointment Rescheduled Email - Authenticated Users		Custom	✓	Email Template to confirm the rescheduling of a paid service appointment for authenticated users.	sfccadm	11/4/2025
Edit Del	Scheduler Payments Service Appointment Rescheduled Email - Guest Users		Custom	✓	Email Template to confirm the rescheduling of a paid service appointment for guest users.	sfccadm	11/4/2025

Phase 4: Data Migration, Testing & Security

- Loading data into Salesforce using **Data Import Wizard** and **Data Loader** for customers, products, orders, and inventory.
- Enabling **Field History Tracking** to monitor critical changes like Order Total, Stock Quantity, and Loyalty Points.
- Configuring **Duplicate Rules** and **Matching Rules** to prevent repeated or conflicting records.
- Setting up **Profiles, Roles, Role Hierarchy, Permission Sets, and Sharing Rules** to control access securely.
- Creating **Test Classes** in Apex to validate triggers, batch jobs, and automation logic.
- Performing tests for all Salesforce features including bookings, approval processes, task automation, flows, and triggers.
- Capturing **input and output screenshots** for every test case — demonstrating the system works as intended.

SETUP

Classic Letterheads

All

Help for this Page

Letterheads define the look and feel of your HTML email templates. Your HTML email templates can inherit the logo, color, and text settings from a Letterhead. Below is a list of your organization's Letterheads.

Tip: Create just a single Letterhead for your company. Use this Letterhead as the foundation for all your HTML email templates.

View:

All

Create New View

New Letterhead

What is a Letterhead?

Action	Letterhead Label	Available For Use	Description
<div>Edit</div> <div>Del</div>	Handsmen Threads	<div>✓</div>	

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

All

Flow Builder

low stock alert - V1

?

Auto-Layout

Last saved on 11/9/2025, 11:41 PM

Active

Run

Debug

View Tests

Save As New Version

Save

Deactivate

Record-Triggered Flow

Start

Object: Inventory

Trigger: A record is created or updated

Conditions: 1

Optimize for: Actions and Related Recer...

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Invent...

Run Immediately

low stock alert

Email Alert

End

Flow Builder

order confirmation - V1

?

Auto-Layout

Last saved on 11/9/2025, 11:30 PM

Active

Run

Debug

View Tests

Save As New Version

Save

Deactivate

Record-Triggered Flow

Start

Object: HandsMen Order

Trigger: A record is updated

Conditions: 1

Optimize for: Actions and Related Recer...

+ Add Scheduled Paths (Optional)

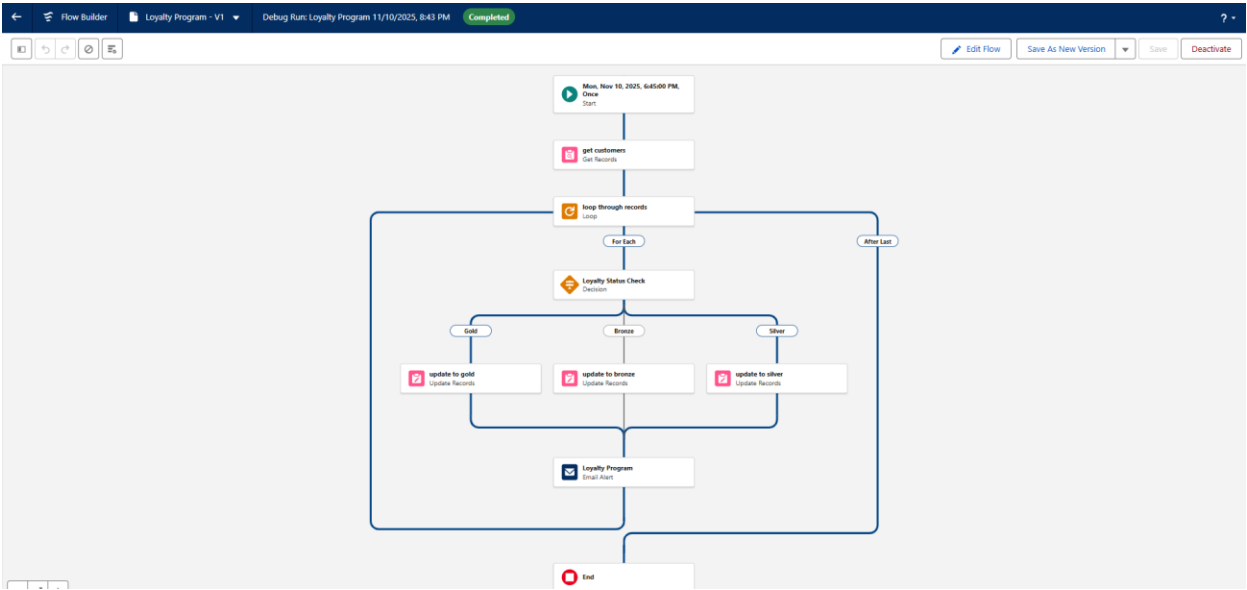
Open Flow Trigger Explorer for Hands...

Run Immediately

order confirmation

Email Alert

End



Phase 5: Deployment, Documentation & Maintenance

❖ **Deployment Strategy**

- Used **Salesforce Change Sets** for moving custom objects, Flows, and triggers from sandbox to production.
- Conducted final testing post-deployment to verify configuration consistency.

❖ **System Maintenance & Monitoring**

- Regular data audits and validation checks scheduled.
- Weekly monitoring of batch jobs and system logs for performance tracking.
- Backup and recovery plans in place for data security.

❖ **Troubleshooting Approach**

- Defined escalation path for issue resolution (Admin → Developer → Project Lead).
- Logged and tracked issues in Salesforce for traceability.

Conclusion

The HandsMen Threads Salesforce CRM project successfully transformed the company’s data management and customer engagement processes. Through automation, robust data modeling, and secure workflows, the system improved operational efficiency, reduced manual errors, and enhanced customer satisfaction. The project demonstrated Salesforce’s ability to integrate business operations seamlessly empowering HandsMen Threads to scale efficiently, make informed decisions, and strengthen its position in the fashion industry.