

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

Project Overview:

This project focuses on developing a Salesforce CRM solution tailored to support the operations of HandsMen Threads. The project is designed to showcase a structured approach to managing customer, order, and inventory information within a fashion retail setting. The system models the core business data and introduces automated workflows that help simulate real operational processes. Key features include automated order confirmations, loyalty status updates based on purchase behavior, low-stock alerts for inventory control, and scheduled updates for bulk order processing. Together, these components demonstrate how the CRM enables smoother workflows and a more responsive customer experience across the organization.

Objectives:

The main objective of this CRM project is to provide HandsMen Threads with a streamlined, reliable system that improves how the business manages customer information, order processing, and inventory operations. By automating key tasks and ensuring data accuracy, the CRM is designed to enhance daily workflows and support better customer service. The following specific goals outline how the system contributes to overall business efficiency and value:

- **Centralize customer, order, and inventory data** to improve accuracy, consistency, and accessibility across the business.
- **Automate routine processes** such as order confirmations, loyalty status updates, and inventory alerts to reduce manual workload.
- **Enhance customer engagement** by ensuring timely communication and loyalty status updates.
- **Improve operational efficiency** by streamlining workflows and minimizing errors caused by manual processes.
- **Strengthen inventory management** with proactive low-stock notifications and scheduled bulk order updates.

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements

During this phase, the operational needs of HandsMen Threads were analyzed to determine the core functionalities required in the CRM. The system is designed to manage customer information, track orders, and monitor inventory levels efficiently. Key problems addressed include maintaining accurate records, automating routine communications, and ensuring timely notifications for low-stock items and order confirmations.

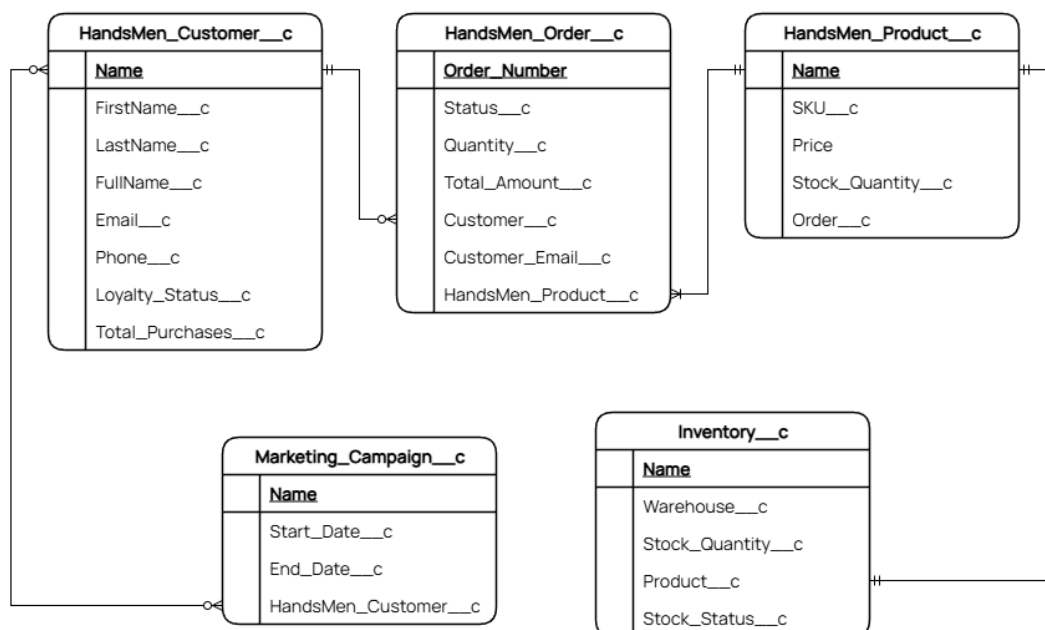
Defining Scope and Objectives

The project scope and objectives were defined to ensure a clear roadmap and realistic deliverables:

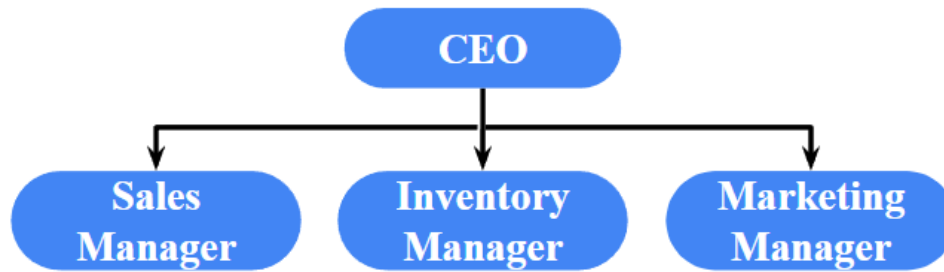
- Develop a Salesforce CRM tailored for HandsMen Threads' customer, product, order, inventory, and marketing management.
- Ensure data integrity through validation rules and structured relationships between objects.
- Implement data security measures by defining roles, profiles, and permission sets to control access to objects and fields based on user role.
- Enable proactive notifications and communication through email templates.
- Implement automation for order confirmations, loyalty status updates, and inventory alerts using Flows, Apex triggers, and batch jobs.

Data Model and Security Model

The data model was designed to organize all essential business data for HandsMen Threads, including customers, products, orders, inventory, and marketing campaigns. Relationships, fields, and formula fields were defined to ensure accurate and consistent data.



Data security was implemented through roles, profiles, and permission sets to control access based on responsibilities.



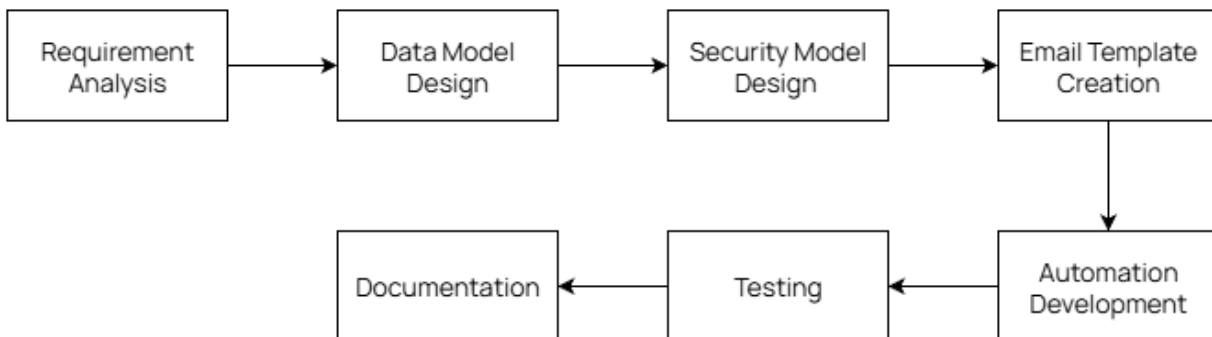
Stakeholders Mapping

The key stakeholders involved in the project are:

- **Developer:** Responsible for all aspects of design, development, and documentation.
- **Instructor:** Provided guidance, requirements, and evaluation.
- **End Users:** HandsMen Threads staff (sales, inventory, and marketing managers) as the intended beneficiaries of the CRM features.

Execution RoadMap

The roadmap outlines the step-by-step plan to implement the CRM:

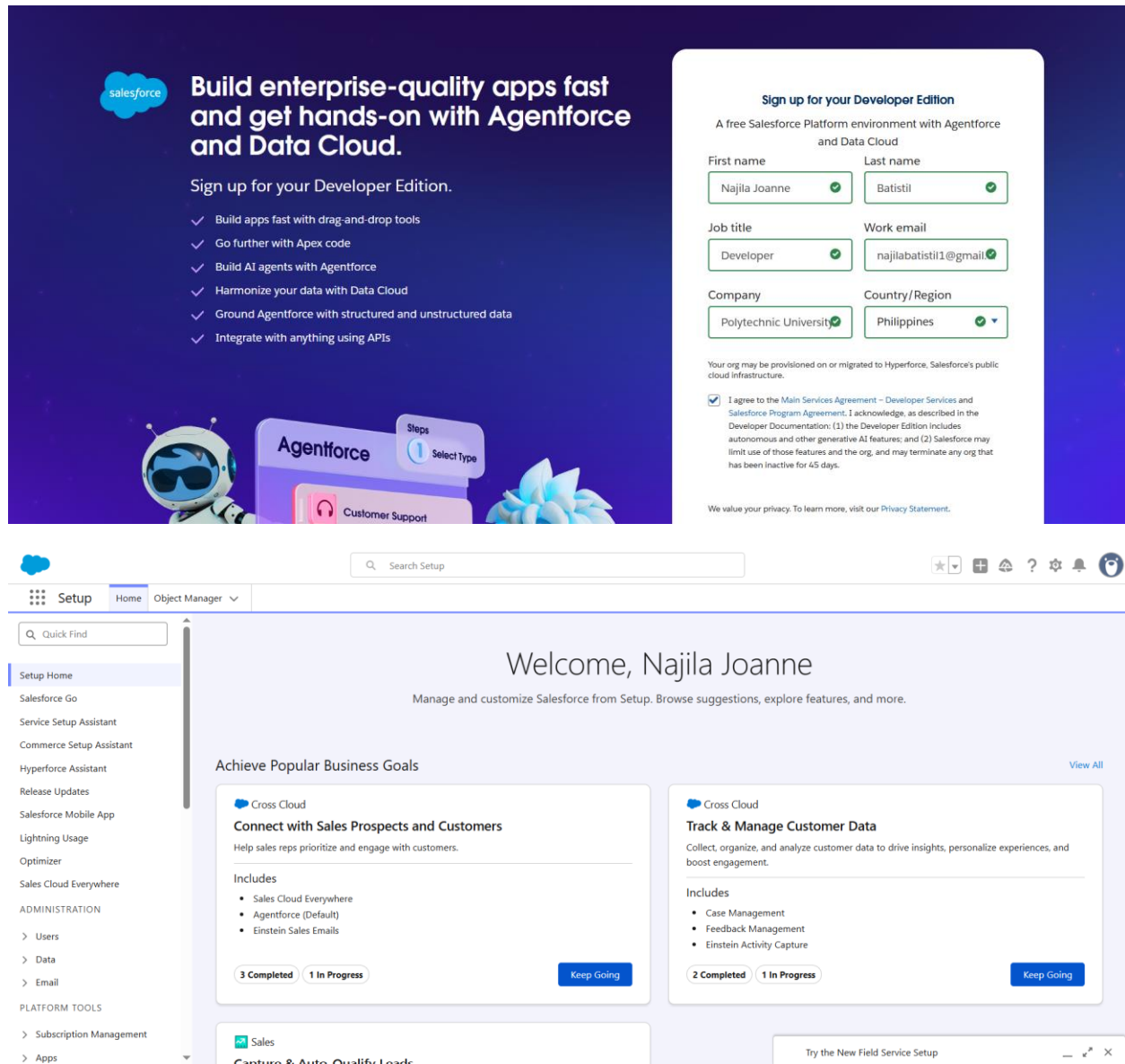


1. **Requirement Analysis** – Identify business needs, problems, and objectives.
2. **Data Model Design** – Define objects, fields, relationships, formula fields, and validation rules, as well as create tabs and app.
3. **Security Model Design** – Set up roles, profiles, and permission sets.
4. **Email Template Design** – Create email templates for orders, loyalty updates, and stock alerts.
5. **Automation Development** – Implement Flows, Apex triggers, and batch jobs.
6. **Testing** – Validate data integrity, automation, and role-based access.
7. **Documentation** – Record all design choices, workflows, and configurations for reference.

Phase 2: Salesforce Development - Backend & Configurations

Setup Environment

The development environment for this project was a Salesforce Developer Org, which provided all the tools needed to build and test the CRM. All configurations, development, and testing were performed directly in this org.



The image displays two screenshots from the Salesforce Developer Edition environment. The top screenshot is the sign-up page for a Developer Edition, featuring a dark blue background with the Salesforce logo and Agentforce branding. It lists benefits such as building apps fast with drag-and-drop tools, using Apex code, and integrating with Agentforce and Data Cloud. The sign-up form includes fields for First name (Najila Joanne), Last name (Batistil), Job title (Developer), Work email (najilabatistil1@gmail.com), Company (Polytechnic University), and Country/Region (Philippines). A checkbox for the Main Services Agreement is checked. The bottom screenshot is the Setup Home page, which greets the user as Najila Joanne and provides a search bar for Setup. The left sidebar contains navigation links for Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, and ADMINISTRATION. The main content area shows 'Achieve Popular Business Goals' with two cards: 'Connect with Sales Prospects and Customers' and 'Track & Manage Customer Data'. Both cards show progress indicators (3 Completed, 1 In Progress) and a 'Keep Going' button.

Sign up for your Developer Edition
A free Salesforce Platform environment with Agentforce and Data Cloud

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

First name: Najila Joanne ✓ Last name: Batistil ✓

Job title: Developer ✓ Work email: najilabatistil1@gmail.com ✓

Company: Polytechnic University ✓ Country/Region: Philippines ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 65 days.

We value your privacy. To learn more, visit our Privacy Statement.

Welcome, Najila Joanne
Manage and customize Salesforce from Setup. Browse suggestions, explore features, and more.

Achieve Popular Business Goals

Connect with Sales Prospects and Customers
Help sales reps prioritize and engage with customers.

Includes

- Sales Cloud Everywhere
- Agentforce (Default)
- Einstein Sales Emails

3 Completed 1 In Progress Keep Going

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

2 Completed 1 In Progress Keep Going

Customization of Objects, Fields, Validation Rules, Email Templates, and Automation

- **Custom Objects and Fields**

The CRM was designed with several custom objects to capture the core business data of HandsMen Threads. These objects store information about customers, orders, products, inventory, and marketing campaigns. Relationships between objects and key fields were defined to ensure accurate tracking and automation across the system.

- **HandsMen_Customer__c** - stores customer details

SETUP > OBJECT MANAGER

HandsMen Customer

Details

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)		

- **HandsMen_Product__c** - stores product catalog

SETUP > OBJECT MANAGER

HandsMen Product

Details

Fields & Relationships 8 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)		
Order	Order__c	Lookup(HandsMen Order)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(18, 0)		
SKU	SKU__c	Text(50)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		

- **HandsMen_Order__c** - stores customer orders

SETUP > OBJECT MANAGER

HandsMen Order

Details

Fields & Relationships 10 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)		
Customer	Customer__c	Lookup(HandsMen Customer)		✓
Customer Email	Customer_Email__c	Email		
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)		

- **Inventory__c** - tracks inventory levels

SETUP > OBJECT MANAGER
Inventory

Details
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)		
Inventory Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Product	Product__c	Master-Detail(HandsMen Product)		✓
Stock Quantity	Stock_Quantity__c	Number(18, 0)		
Stock Status	Stock_Status__c	Formula (Text)		
Warehouse	Warehouse__c	Text(60)		

- **Marketing_Campaign__c** - records promotional campaigns

SETUP > OBJECT MANAGER
Marketing Campaign

Details
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)		
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		

- **Validation Rules**

Validation rules were implemented to ensure data accuracy and prevent incorrect records from being saved in the system. These rules check critical fields in key objects and enforce logical constraints that reflect real-world business requirements.

- **HandsMen Order__c Object Validation Rule**
 - Purpose: Prevents orders from being saved with zero or negative amounts
 - Rule: `Total_Amount__c <= 0`
 - Error Message: "Please Enter Correct Amount"
- **Inventory__c Object Validation Rule**
 - Purpose: Prevents inventory records with zero or negative stock levels.
 - Rule: `Stock_Quantity__c <= 0`
 - Error Message: "The inventory count is never less than zero."
- **HandsMen Customer__c Object Validation Rule**
 - Purpose: Ensures only valid email addresses with "@gmail.com" are entered.
 - Rule: `NOT CONTAINS (Email, "@gmail.com")`
 - Error Message: "Please fill Correct Gmail"

- **Email Templates**

Email templates were created for communication with customers and staff. These templates use merge fields to dynamically include relevant data such as customer names, order details, and inventory information.

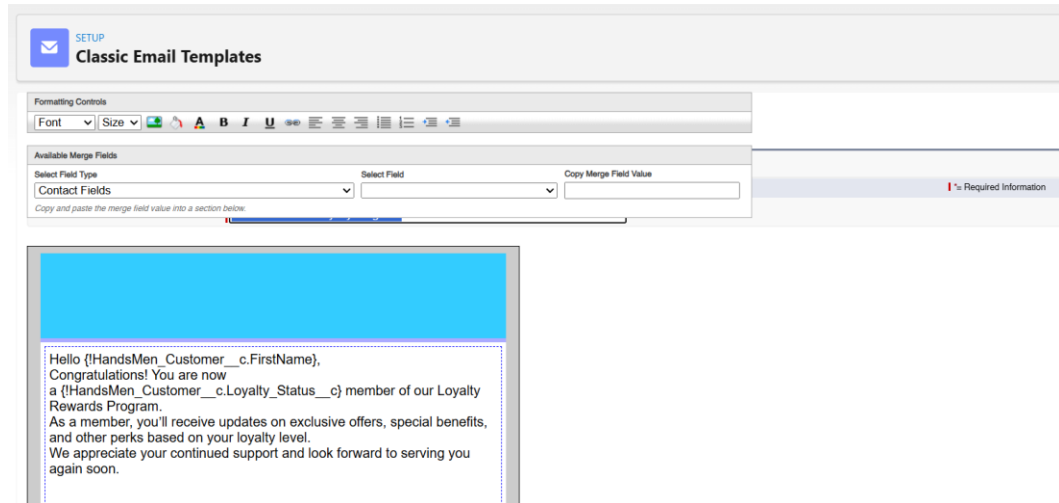
- **Order Confirmation Email**

The screenshot shows the 'Classic Email Templates' setup interface. At the top, there's a 'SETUP' button and the title 'Classic Email Templates'. Below this is a 'Formatting Controls' bar with options for font, size, color, bold, italic, underline, and text alignment. Under 'Available Merge Fields', 'Contact Fields' is selected. The 'HTML Email Content' section shows a subject line: 'Your Order has been Confirmed!'. The email body contains a blue header and a message: 'Dear {!HandsMen_Order__c.Customer__c}, Your order #{!HandsMen_Order__c.Name} has been confirmed! Thank you for shopping with us. Best Regards, Sales Team'. A 'Required Information' icon is visible in the top right of the content area.

- **Low Stock Alert Email**

The screenshot shows the 'Classic Email Templates' setup interface for a 'Low Stock Alert' template. It includes a 'Text Email Template' header and a 'Help for this Page' link. The 'Email Template Detail' section shows a table with fields: Email Template Name (Low Stock Alert), Template Unique Name (Low_Stock_Alert), Encoding (Unicode (UTF-8)), Author (Najila Joanne Batista), Description, Created By (Najila Joanne Batista, 11/19/2025, 8:10 AM), and Modified By (Najila Joanne Batista, 11/21/2025, 7:40 AM). The 'Email Template' section shows the subject 'Low Stock Alert!' and a 'Plain Text Preview' of the email body: 'Hello, This is to inform you that following product is running low on stock: Product Name: {!Inventory__c.Product__c} Current Stock Quantity: {!Inventory__c.Stock_Quantity__c} Please restock it at the soonest convenient time to avoid running out.'

- **Loyalty Program Email**

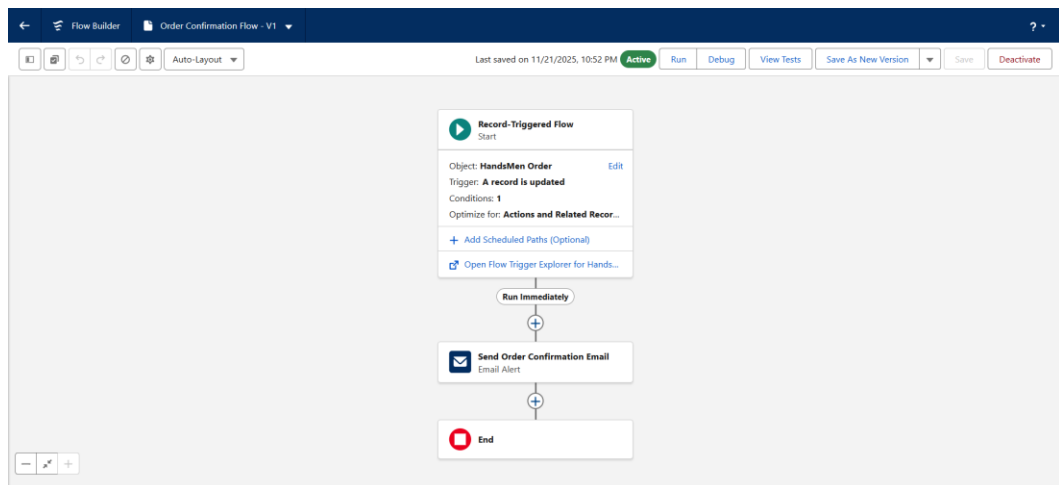


- **Automation**

Automation was implemented to streamline routine business processes and reduce manual effort. Flows were primarily used to handle tasks such as sending confirmation email, updating loyalty status, and sending inventory alerts. Automation ensures that critical business operations occur consistently and efficiently without manual intervention.

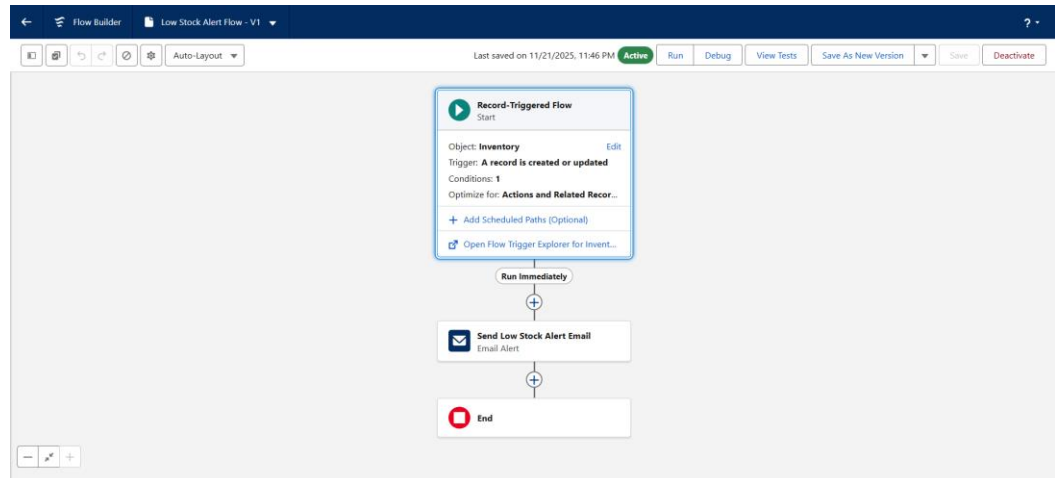
- **Order Confirmation Flow**

- A record-triggered flow that automatically sends an email to the customer after order status is updated to confirmed.

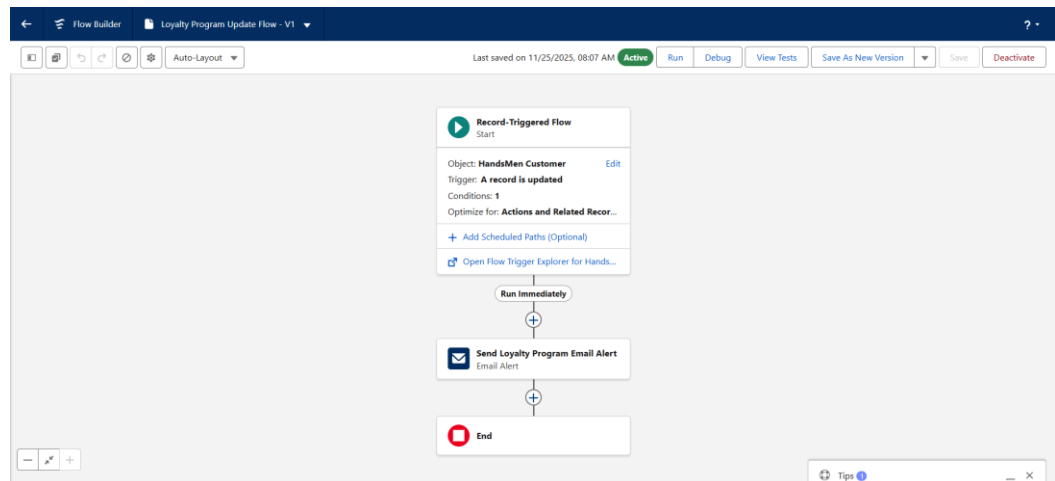


- **Low Stock Alert Flow**

- A record-triggered flow that automatically sends an email to inventory managers when stock drops below 5 units.



- **Loyalty Status Flow**
 - A record-triggered flow that automatically sends an email to customers when their loyalty status is changed.



Apex Classes and Triggers

Apex was used to handle more complex logic that could not be fully achieved through standard automation. This includes custom triggers and classes to manage order details, inventory updates, customer loyalty status, and bulk order processing. Apex ensures that business rules are consistently enforced and data integrity is maintained, even during high-volume operations.

- **Order Validation**
 - Updates order status based on order quantity.
- **OrderTrigger Trigger**
 - Object: HandsMen_Order__c
 - Fires: before insert, before update
- **OrderTriggerHandler Class**

- Method: `validateOrderQuantity(List<HandsMen_Order__c> orderList)`
 - Checks rules:
 - Confirmed - Quantity > 500
 - Pending - Quantity > 200
 - Rejection - Quantity = 0
- **Update Order Total**
 - Automatically calculate Total Amount as Quantity × Product Price.
 - **OrderTotalTrigger Trigger**
 - Object: HandsMen_Order__c
 - Fires: before insert, before update
 - **OrderTotalHandler Class**
 - Method: `updateOrderTotal(List<HandsMen_Order__c> orders)`
 - Queries HandsMen_Product__c to get Price__c
 - Updates Total_Amount__c for each order.
- **Stock Deduction**
 - Reduce stock quantity when order is confirmed.
 - **StockDeductionTrigger Trigger**
 - Object: HandsMen_Order__c
 - Fires: after insert, after update
 - **StockDeductionHandler Class**
 - Method: `deductStock(List<HandsMen_Order__c> orders)`
 - Queries inventory for product(s) in the orders.
 - Deducts quantity from stock.
- **Loyalty Status Update**
 - Automatically update customer's loyalty status based on their total purchases.
 - **LoyaltyStatusUpdateTrigger Trigger**
 - Object: HandsMen_Customer__c
 - Fires: after update
 - **LoyaltyStatusHandler Class**
 - Method: `updateLoyaltyStatus(Set<Id> customerIds)`
 - Queries customers whose total purchases changed.
 - Updates Loyalty_Status__c:
 - Gold – Total Purchases > 1000
 - Silver – Total Purchases > 500
 - Bronze – Total Purchases < 500

- **Inventory Batch Job / Scheduler**
 - Automatically restock products with low inventory every midnight.

Phase 3: UI/UX Development & Customization

Lightning App Setup

The Salesforce Lightning App was configured to provide users with a tailored interface that organizes all CRM functionality for HandsMen Threads. Through the App Manager, the app was set up to include tabs involving all key objects: HandsMen Customer, HandsMen Order, HandsMen Product, Inventory, and Marketing Campaign, allowing users to easily access records within a single workspace.

ID	App Name	Developer Name	Description	Created Date	Theme	Status
19	Sales	Sales	The world's most popular sales force automation (SFA) solution	11/12/2025, 1:08 A...	Classic	
20	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	11/12/2025, 1:08 A...	Lightning	✓
21	Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	11/12/2025, 1:08 A...	Lightning	✓

HandsMen Customer

Recently Viewed

1 item • Updated a few seconds ago

Search this list...

HandsMen Customer Name
1 John Doe

Page Layouts

Page layouts were customized across all key objects to improve clarity and ease of use when viewing or editing records. Fields were displayed in a two-column format to make information

easier to scan. This structured layout ensures that users can quickly locate critical information and navigate records more efficiently within the app.

- **HandsMen Customers**

The screenshot shows the 'HandsMen Customer' record page in Salesforce. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area has a top bar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', and 'Redo' buttons. Below this is a 'Fields' section with a 'Quick Find' search bar and a list of fields: Section, Blank Space, Created By, Email, LastName, Loyalty Status, Owner, and Phone. The 'HandsMen Customer Detail' section displays information in a structured layout. The 'Information' section (header visible on edit only) shows: HandsMen Customer Name (Sample Text), Email (sarah.sample@company.com), Full Name (Sample Text), Phone (1-415-555-1212), First Name (Sample Text), Total Purchases (67,689), Last Name (Sample Text), Loyalty Status (Sample Text), and Owner (Sample Text). The 'System Information' section (header visible on edit only) shows: Created By (Sample Text) and Last Modified By (Sample Text). The 'Custom Links' section (header visible on edit only) is empty. The 'Mobile Cards (Salesforce mobile only)' section is also empty.

- **HandsMen Orders**

The screenshot shows the 'HandsMen Order' record page in Salesforce. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area has a top bar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', and 'Redo' buttons. Below this is a 'Fields' section with a 'Quick Find' search bar and a list of fields: Section, Blank Space, Customer Email, HandsMen OrderNumber, Quantity, Created By, HandsMen Product, Status, Customer, Last Modified By, and Total Amount. The 'HandsMen Order Detail' section displays information in a structured layout. The 'Information' section (header visible on edit only) shows: HandsMen OrderNumber (OEN-2004-001234), Quantity (16,273), HandsMen Product (Sample Text), Total Amount (73,199), Customer (Sample Text), Status (Sample Text), Customer Email (sarah.sample@company.com), Owner (Sample Text), and Created By (Sample Text). The 'System Information' section (header visible on edit only) shows: Last Modified By (Sample Text). The 'Custom Links' section (header visible on edit only) is empty. The 'Mobile Cards (Salesforce mobile only)' section is also empty.

- **HandsMen Products**

The screenshot shows the 'HandsMen Product' record page in Salesforce. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area has a top bar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', and 'Redo' buttons. Below this is a 'Fields' section with a 'Quick Find' search bar and a list of fields: Section, Blank Space, Last Modified By, SKU, Order, Stock Quantity, Created By, HandsMen Product, and Price. The 'HandsMen Product Detail' section displays information in a structured layout. The 'Information' section (header visible on edit only) shows: HandsMen Product Name (Sample Text), Price (\$123.45), SKU (Sample Text), Stock Quantity (56,652), and Owner (Sample Text). The 'System Information' section (header visible on edit only) shows: Created By (Sample Text) and Last Modified By (Sample Text). The 'Custom Links' section (header visible on edit only) is empty. The 'Mobile Cards (Salesforce mobile only)' section is also empty.

- **Inventory**

The screenshot shows the 'Inventory' object manager page layout configuration. The left sidebar lists various configuration options, with 'Page Layouts' selected. The main area displays the 'Inventory Detail' page layout. The layout includes a header section with fields like 'Inventory Number', 'Product', and 'Warehouse'. Below the header, there are sections for 'System Information' and 'Custom Links'. The 'System Information' section includes fields like 'Created By' and 'Last Modified By'. The 'Custom Links' section is currently empty. The 'Mobile Cards' section is also empty.

- **Marketing Campaigns**

The screenshot shows the 'Marketing Campaign' object manager page layout configuration. The left sidebar lists various configuration options, with 'Page Layouts' selected. The main area displays the 'Marketing Campaign' page layout. The layout includes a header section with fields like 'Marketing Campaign Number', 'HandMen Customer', and 'Owner'. Below the header, there are sections for 'System Information' and 'Custom Links'. The 'System Information' section includes fields like 'Created By' and 'Last Modified By'. The 'Custom Links' section is currently empty. The 'Mobile Cards' section is also empty.

User Management

User management was configured to ensure that system access aligns with business roles and responsibilities. Three users were created, each assigned to a specific role: Sales Manager, Inventory Manager, and Marketing Team. Profiles and permission sets were used to control which users can view, edit, or manage customer, order, product, inventory, and marketing data. Basic security measures such as object-level permissions and field-level access were applied to maintain data protection and prevent unauthorized modifications. This setup ensures that users have the appropriate level of access needed to perform their tasks while safeguarding the integrity of the CRM data.

Roles	Access Level
Sales Manager	Full access to Customers, Orders
Inventory Manager	Read & Edit on Inventory, Products
Marketing Team	Read on Customers, Edit on Marketing Campaigns

Reports and Dashboards

While no reports or dashboards were configured in this implementation, the HandsMen Threads Salesforce CRM supports generating custom reports and dashboards to monitor key business metrics. Reports could include summaries of orders, inventory levels, and customer loyalty status, while dashboards could visually display trends and highlight critical data for management. These features would enable HandsMen Threads to make informed business decisions and track operational performance effectively.

Lightning Pages

The Lightning Pages for each object were customized using the Lightning App Builder, ensuring that users can efficiently navigate customer, order, product, inventory, and campaign records. A simple two-column layout was used to balance visual structure and readability of the record details.

- **HandsMen Customers**

The screenshot shows the 'HandsMen Customer' record page for 'John Doe'. The page has a top navigation bar with a search bar and various utility icons. Below the navigation bar is a sub-navigation bar with tabs for 'HandsMen Threads', 'HandsMen Customer', 'HandsMen Orders', 'HandsMen Products', 'Inventories', 'Marketing Campaigns', 'Reports', and 'Dashboards'. The main content area displays the customer's details in a two-column layout. The left column contains fields for 'HandsMen Customer Name', 'FullName', 'FirstName', 'LastName', 'Created By', and 'Created' date. The right column contains fields for 'Email', 'Phone', 'Total Purchases', 'Loyalty Status', 'Owner', and 'Last Modified By'. The 'Details' tab is selected, showing the following data:

Field	Value
HandsMen Customer Name	John Doe
FullName	John Doe
FirstName	John
LastName	Doe
Created By	Najila Joanne Batistil
Created	11/21/2025, 6:55 AM
Email	chrewawi@gmail.com
Phone	0999999999
Total Purchases	800
Loyalty Status	Silver
Owner	Najila Joanne Batistil
Last Modified By	Najila Joanne Batistil
Last Modified	11/24/2025, 4:08 PM

- **HandsMen Orders**

The screenshot shows the 'HandsMen Order' record page for 'O-0006'. The page has a top navigation bar with a search bar and various utility icons. Below the navigation bar is a sub-navigation bar with tabs for 'HandsMen Threads', 'HandsMen Customer', 'HandsMen Orders', 'HandsMen Products', 'Inventories', 'Marketing Campaigns', 'Reports', and 'Dashboards'. The main content area displays the order's details in a two-column layout. The left column contains fields for 'HandsMen OrderNumber', 'HandsMen Product', 'Customer', 'Customer Email', 'Created By', and 'Created' date. The right column contains fields for 'Quantity', 'Total Amount', 'Status', 'Owner', and 'Last Modified By'. The 'Details' tab is selected, showing the following data:

Field	Value
HandsMen OrderNumber	O-0006
HandsMen Product	Leather Jacket
Customer	John Doe
Customer Email	chrewawi@gmail.com
Created By	Najila Joanne Batistil
Created	11/21/2025, 9:43 AM
Quantity	600
Total Amount	120,000
Status	Confirmed
Owner	Najila Joanne Batistil
Last Modified By	Najila Joanne Batistil
Last Modified	11/21/2025, 9:43 AM

- HandsMen Products

HandsMen Threads

HandsMen Customer

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Search...

Star

Plus

Home

Help

Settings

Notifications

Profile

HandsMen Product

Leather Jacket

New Contact

Edit

New Opportunity

Related

Details

HandsMen Product Name

Leather Jacket

Price

\$200

SKU

L-001

Stock Quantity

10

Owner

Najila Joanne Batistil

Created By

Najila Joanne Batistil

11/21/2025, 6:57 AM

Last Modified By

Najila Joanne Batistil

11/24/2025, 10:56 PM

- Inventory

HandsMen Threads

HandsMen Customer

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Search...

Star

Plus

Home

Help

Settings

Notifications

Profile

Inventory

I-0002

New Contact

Edit

New Opportunity

Related

Details

Inventory Number

I-0002

Stock Quantity

400

Product

[Leather Jacket](#)

Stock Status

Available

Warehouse

Warehouse 123

Created By

Najila Joanne Batistil

11/21/2025, 7:27 AM

Last Modified By

Najila Joanne Batistil

11/24/2025, 10:48 PM

- Marketing Campaigns

HandsMen Threads

HandsMen Customer

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Search...

Star

Plus

Home

Help

Settings

Notifications

Profile

Marketing Campaign

MC-0001

New Contact

Edit

New Opportunity

Related

Details

Marketing Campaign Number

MC-0001

Start Date

11/21/2025

HandsMen Customer

[John Doe](#)

End Date

11/28/2025

Owner

Najila Joanne Batistil

Created By

Najila Joanne Batistil

11/24/2025, 10:58 PM

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11/24/2025, 10:58 PM

Phase 4: Data Migration, Testing & Security

Data Loading Process

Data migration was performed to populate the Salesforce CRM with relevant business data for HandsMen Threads. The Data Import Wizard was used to import records for the HandsMen Customers object. Field mappings were carefully configured to ensure data integrity and consistency during the migration process.

- **HandsMen Customers Data Import**

The top screenshot shows the Salesforce Data Import Wizard interface. The 'Review & Start Import' step is active, showing a progress bar with 'Choose data', 'Edit mapping', and 'Start import' stages. A modal dialog box is displayed in the center with the message: "Congratulations, your import has started! Click OK to view your import status on the Bulk Data Load Job page." The bottom screenshot shows the 'HandsMen Customer' list view in Salesforce. The list contains 20 items, sorted by 'HandsMen Customer Name'. The records are as follows:

	HandsMen Customer Name
1	Alice Black
2	Basil Wenceslas
3	Dragon Davich
4	George Dapper
5	Jack Dodge
6	Jessica Jones
7	John Doe
8	John Downes
9	Julia Wilds
10	Juniper Birsch
11	Justin Short
12	Laura Black
13	Patti Patel
14	Sal Sands
15	Sarah Smith

Field History Tracking, Duplicate Rules, Matching Rules

In this project, Field History Tracking, Duplicate Rules, and Matching Rules were not implemented. These features are typically used to monitor changes to important fields, prevent

duplicate records, and define criteria for identifying matching data. Although they were not configured in this version of the system, they can be added in future enhancements to further improve data accuracy, security, and auditability.

Profiles, Roles and Role Hierarchy, Permission sets, Sharing Rules

The security model of the Salesforce CRM was configured to ensure that each user has appropriate access to data based on their function within HandsMen Threads. Multiple layers of Salesforce security were used to balance usability with data protection.

- **Profiles**

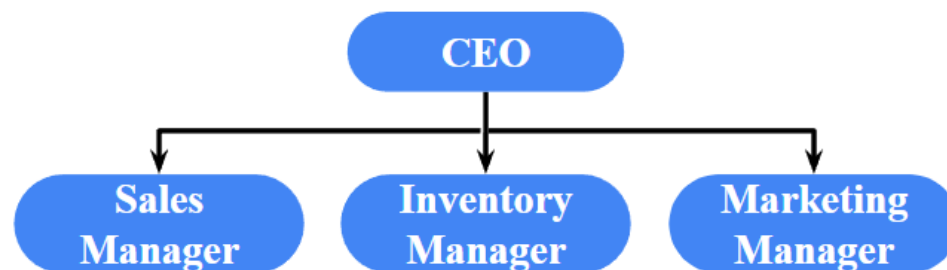
A custom profile called Platform 1 was created by cloning the Standard User profile. This profile was adjusted to fit the needs of HandsMen Threads by granting additional object permissions.

Key configurations include:

- Read and Create access for HandsMen Products
- Read, Create, and Edit access for Inventory

- **Roles and Role Hierarchy**

Three roles were added to the system: Sales, Inventory, and Marketing. All three roles report directly to the CEO, establishing a simple role hierarchy.



- **Permission Sets**

Permission Sets were used to provide additional access without modifying the user's assigned profile. These were helpful for granting specific privileges selectively. The following Permission Sets were implemented for HandsMen Threads:

Roles	Access Level
Sales Manager	Full access to Customers, Orders
Inventory Manager	Read & Edit on Inventory, Products
Marketing Team	Read on Customers, Edit on Marketing Campaigns

Creation of Test Classes

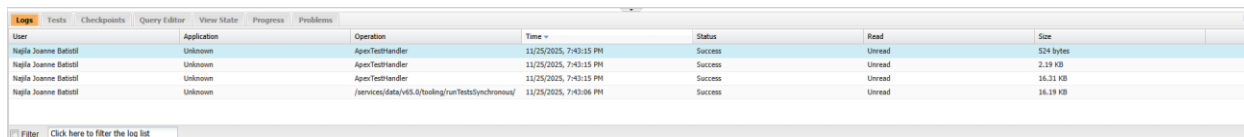
A test class was created to validate the functionality of the Loyalty Status trigger. The test inserts a sample HandsMen Customer record with a defined Total_Purchases__c value and verifies that the trigger correctly updates the Loyalty_Status__c field based on the purchase amount. This

minimal test class demonstrates the application of automated testing in the CRM to maintain data integrity and verify business rules.



```
1 @isTest
2 public class LoyaltyStatusTest {
3     @isTest
4     static void testLoyaltyStatusTrigger() {
5         HandsMen_Customer__c cust = new HandsMen_Customer__c(
6             Name = 'Test Customer',
7             Total_Purchases__c = 1200,
8             Email__c = 'test@gmail.com'
9         );
10        insert cust;
11
12        cust.Total_Purchases__c = 1201;
13        update cust;
14
15        cust = [SELECT Loyalty_Status__c FROM HandsMen_Customer__c WHERE Id = :cust.Id];
16        System.assertEquals('Gold', cust.Loyalty_Status__c);
17    }
18 }
```

Result:



User	Application	Operation	Time	Status	Read	Size
Napila Joanne Batistli	Unknown	ApexTestHandler	11/25/2025, 7:43:15 PM	Success	Unread	524 bytes
Napila Joanne Batistli	Unknown	ApexTestHandler	11/25/2025, 7:43:15 PM	Success	Unread	2.19 KB
Napila Joanne Batistli	Unknown	ApexTestHandler	11/25/2025, 7:43:15 PM	Success	Unread	16.31 KB
Napila Joanne Batistli	Unknown	/services/data/v45.0/tooling/runTests/synchronous/	11/25/2025, 7:43:06 PM	Success	Unread	16.19 KB

In addition to running an Apex test class, the functionality of triggers and handlers was manually verified by creating test records in Salesforce and observing the expected updates to fields such as Order Status, Total Amount, and Inventory stock quantities.

Phase 5:Deployment, Documentation & Maintenance

Deployment Strategy

The CRM solution for HandsMen Threads was developed and tested in a Salesforce Developer Org. In a real scenario, Salesforce allows you to move the system from the developer environment to a live environment so it can be used by actual users.

System Maintenance and Monitoring

The system will be maintained by periodically reviewing workflows, flows, and Apex jobs to ensure they operate correctly. Regular monitoring of debug logs, scheduled jobs, and user feedback will help identify any issues or bottlenecks. Updates to business logic, objects, or automation can be applied incrementally and tested in a sandbox before deployment.

Troubleshooting Approach

Any errors or unexpected behavior will be addressed through a structured approach:

1. Review error messages and debug logs in Salesforce.
2. Check validation rules, flows, and Apex triggers for conflicts or logic issues.
3. Test changes in a sandbox or developer environment before applying to production.
4. Document each troubleshooting step and resolution to maintain a knowledge base for future reference.

Conclusion

The Salesforce CRM developed for HandsMen Threads demonstrates how customer, order, product, and inventory data can be efficiently managed in an integrated and automated system. Key features such as automated order confirmations, loyalty status updates, inventory alerts, and role-based access control provide a reliable foundation for improved operational efficiency and enhanced customer engagement.

While certain advanced features were not implemented in this version, the CRM offers a robust framework that can be expanded in the future.

Future Enhancements

- **Field History Tracking** – Track changes to important fields for auditing and accountability.
- **Duplicate Rules & Matching Rules** – Maintain clean and accurate data by preventing duplicate records.
- **Reports and Dashboards** – Visualize key metrics such as orders, inventory levels, and customer loyalty trends for informed decision-making.
- **AI-Powered Suggestions** – Provide automated recommendations for promotions or stock replenishment based on historical data.
- **Chatbot Integration** – Enable customers to receive instant updates and support via automated messaging.

Overall, the project illustrates how Salesforce can streamline workflows, enforce business rules consistently, and provide actionable insights, while also allowing for future growth and enhancements to further support HandsMen Threads' business objectives.