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

Abstract

The **HandsMen Threads CRM** is a Salesforce-based system designed to streamline key operations in a men's fashion business, including customer management, orders, product cataloging, and inventory tracking. It automates essential processes through Flows, Email Alerts, and Validation Rules, improving accuracy and efficiency. The system supports the brand's goal of delivering a sophisticated, personalized customer experience while providing real-time insights for better business decisions.

Objectives

The primary objective of the HandsMen Threads CRM is to;

- **Centralize customer information** to improve customer management and deliver personalized service.
- **Streamline order processing and inventory tracking** to reduce manual work and ensure accurate, real-time updates.
- **Automate key workflows** such as confirmations, stock updates, and loyalty tracking to increase efficiency and minimize errors.
- **Enhance decision-making** through organized data, dashboards, and reports that provide insights into sales and product performance.
- **Strengthen the brand's sophisticated customer experience** by ensuring smooth, fast, and reliable interactions across all touchpoints.

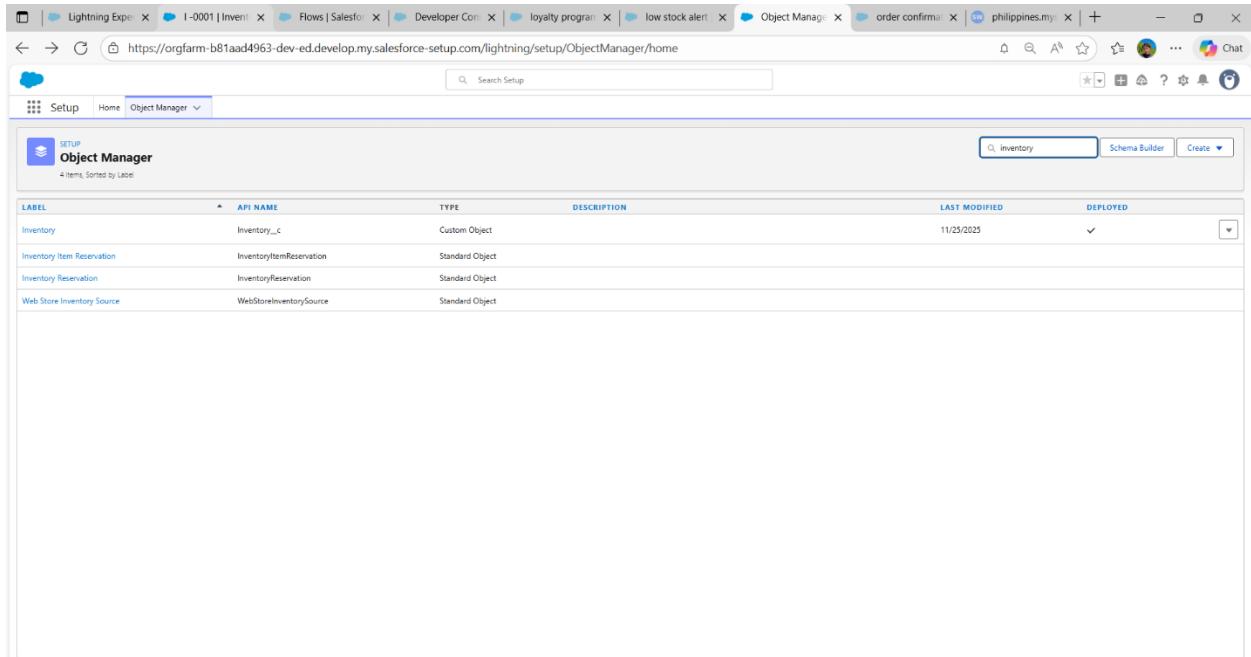
Project Phases

Phase 1: Architecture & Planning

Custom Object Creation

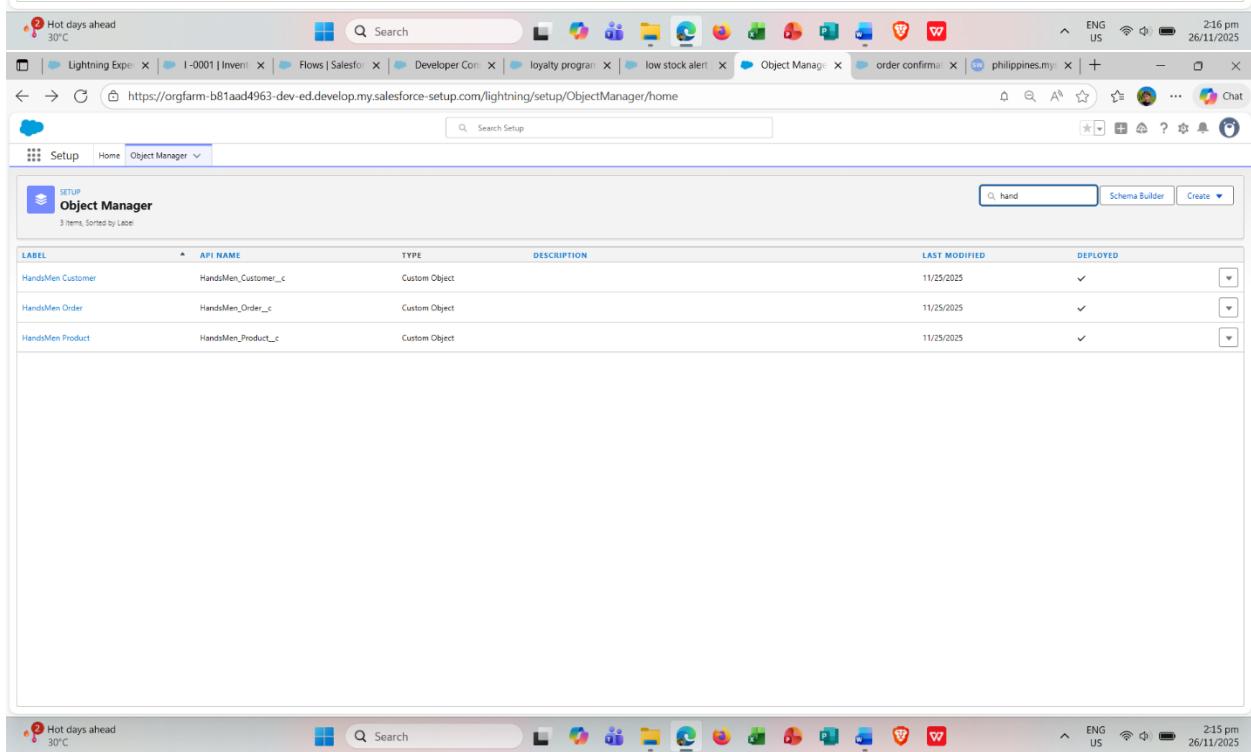
5 custom Object are created to store in Business-critical data

- HandsMen Customer
- HandsMen Product
- HandsMen Order
- Inventory
- Marketing Campaign



The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains "inventory". The table below lists four objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Inventory	Inventory__c	Custom Object		11/25/2025	✓
Inventory Item Reservation	InventoryItemReservation	Standard Object			
Inventory Reservation	InventoryReservation	Standard Object			
Web Store Inventory Source	WebStoreInventorySource	Standard Object			



The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains "hand". The table below lists three objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Customer	HandsMen_Customer__c	Custom Object		11/25/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		11/25/2025	✓
HandsMen Product	HandsMen_Product__c	Custom Object		11/25/2025	✓

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with tabs like Setup, Home, and Object Manager. Below it is a search bar with the placeholder "Search Setup". The main area is titled "Object Manager" with a sub-section "marketing". A table lists one item: "Marketing Campaign" with API name "Marketing_Campaign__c", Type "Custom Object", Last Modified "11/25/2025", and Deployed status. The bottom of the screen shows a Windows taskbar with various application icons.

Data Management – Tabs

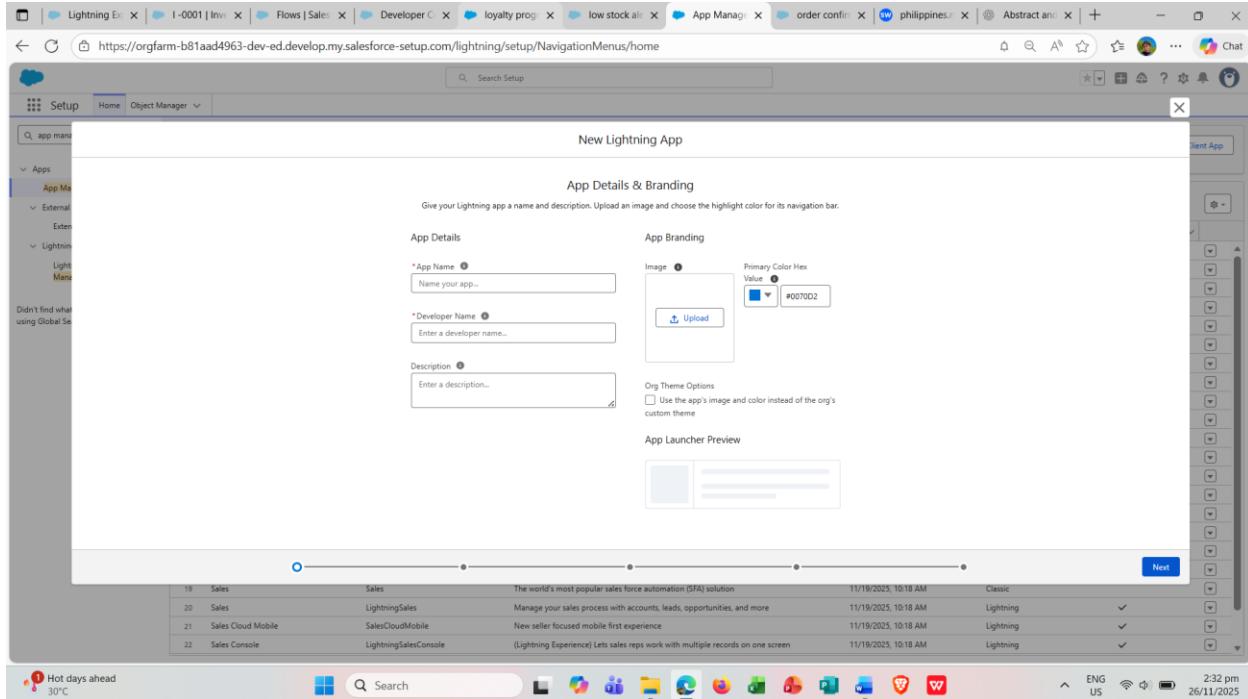
Tabs were created for each custom object:

- Tab - HandsMen Customer
- Tab - HandsMen Product
- Tab - HandsMen Order
- Tab - Inventory
- Tab - Marketing Campaign

The screenshot shows the Salesforce Custom Tabs page. The URL is https://orgfarm-b81aad4963-dev-ed.develop.my.salesforce-setup.com/lightning/setup/CustomTabs/home. The page has a navigation bar with tabs like Setup, Home, Object Manager, and a search bar. The main content area is titled "Custom Tabs" and includes a note about creating new custom tabs. It shows a table of "Custom Object Tabs" with columns for Action, Label, and Description. The table lists five tabs: "HandsMen Customers", "HandsMen Orders", "HandsMen Products", "Inventory", and "Marketing Campaign". Each row has "Edit | Del" links. To the right of the table is a "Tab Style" section with color swatches for People, Shopping Cart, Bar, Building, and Mail. A "Help for this Page" link is at the bottom right.

Data Management – App Manager

- A new Lightning App named HandsMen Threads was created from the App Manager.



Data Management- Fields

- Fields and lookup relationships were created for all five custom objects: HandsMen Customer, HandsMen Product, HandsMen Order, Inventory, and Marketing Campaign.

HandsMen Customer

HandsMen Customer

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
FirstName	FirstName_c	Text(60)		
FullName	FullName_c	Formula (Text)		
HandsMen Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
LastName	LastName_c	Text(60)		
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

HandsMen Product

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)		

HandsMen Order

HandsMen Order

Fields & Relationships				
10 Items, Sorted by Field Label				
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 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)		✓

<https://orgfarm-b81aad4963-dev-ed.develop.my.salesforce-setup.com/one/one.app#/setup/ObjectManager/01lgL000003CHmX/view>

2:44 pm
26/11/2025

Inventory

Inventory

Fields & Relationships				
7 Items, Sorted by Field Label				
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)		✓

<https://orgfarm-b81aad4963-dev-ed.develop.my.salesforce-setup.com/one/one.app#/setup...>

2:45 pm
26/11/2025

Marketing Campaign

The screenshot shows the Salesforce Object Manager interface for the Marketing Campaign object. The left sidebar contains navigation links for 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 is titled 'Fields & Relationships' and displays a table of fields:

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		

A Snipping Tool window is overlaid on the right side of the screen, showing a screenshot of the same Salesforce interface. The status bar at the bottom indicates 'ENG US' and the date '26/11/2025'.

Data Configuration:

- Validation rules were created for HandsMen Order, Inventory, and HandsMen Customer.

HandsMen Customer

The screenshot shows the Salesforce Object Manager interface for the HandsMen Customer object. The left sidebar contains navigation links for 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 is titled 'Validation Rules' and displays a table of validation rules:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email	Top of Page	Please fill Correct Gmail	✓	Reyson Naples, 11/25/2025, 6:27 PM

A status bar at the bottom indicates 'Hot days ahead 30°C' and the date '26/11/2025'.

HandsMen Order

The screenshot shows the Salesforce Setup interface for the 'HandsMen Order' object. The left sidebar is expanded, showing various setup categories like Fields & Relationships, Page Layouts, and Validation Rules. The 'Validation Rules' section is selected and highlighted in blue. The main content area displays a table titled 'Validation Rules' with one item listed:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Total_Amount	Total Amount	Please Enter Correct Amount	✓	Reyson Napolis, 11/25/2025, 6:18 PM

The status bar at the bottom indicates 'Hot days ahead 30°C' and the system time '2:51 pm 26/11/2025'.

Inventory

The screenshot shows the Salesforce Setup interface for the 'Inventory' object. The left sidebar is expanded, showing various setup categories. The 'Validation Rules' section is selected and highlighted in blue. The main content area displays a table titled 'Validation Rules' with one item listed:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Stock_Quantity	Top of Page	the inventory count is never less than zero.	✓	Reyson Napolis, 11/25/2025, 6:24 PM

The status bar at the bottom indicates 'Very humid Now' and the system time '2:53 pm 26/11/2025'.

Phase 2: Development

Data Security

- Profiles: Inventory, Marketing, and Sales profiles were created under the CEO profile.
- Users: Multiple users named Niklaus Mikaelson, Kol Mikaelson, and Daniel Mikaelson were created with different roles but the same profile.

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-b81aad4963-dev-ed.develop.my.salesforce-setup.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL0000065Adg>. The page displays the Profile Detail for a Standard User. The user has the following details:

- Name: Standard User
- User License: Salesforce
- Created By: salesforce.com, inc. 11/19/2025, 10:18 AM
- Modified By: Baseline.Napoles 11/25/2025, 6:13 PM

Under the Page Layouts section, there is a large table mapping various object layouts to specific page types. The columns include:

- Object
- Global
- Location Group
- Macro
- Operating Hours
- Opportunity Product
- Order
- Payment
- Payment Authorization
- Payment Gateway
- Payment Gateway Log

Each row lists a specific layout name and its corresponding assignment. For example, the Global Layout for Case is 'Case Layout'.

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-b81aad4963-dev-ed.develop.my.salesforce-setup.com/lightning/setup/Roles/home>. The page displays the Creating the Role Hierarchy section. The role hierarchy tree is shown on the left, with the root node being 'Your Organization's Role Hierarchy'. The tree includes nodes for:

- Collaborate All External
- Polytechnic University of the Philippines
 - CEO
 - CFO
 - COO
 - Inventory
 - Marketing
 - Sales
 - SVP, Customer Service & Support
 - SVP, Human Resources
 - SVP, Sales & Marketing

Nodes are represented by icons and can be expanded or collapsed. The status bar at the bottom indicates it is 3:04 pm on 26/11/2025, with the system language set to ENG US.

Lightning | I-0001 | Flows | S | Developer | loyalty pr | low stock | Users | Sal | philippine | Abstract | Messenger | Google G | Chat

https://orgfarm-b81aad4963-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ManageUsers/page?address=%2F005gL0000AvMne%3Fnoredirect%3D1%26isUserEntit...

Setup Home Object Manager

Search Setup

Users

User Daniel Mikaelson

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users

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

User Detail

Name: Daniel Mikaelson
Alias: dmlka
Email: rymikaelson0@gmail.com [Verify]
Username: rymikaelson0@gmail.com
Nickname: User17641256008492041288
Title:
Company:
Department:
Division:
Address:
Time Zone: (GMT-08:00) Pacific Standard Time (America/Los_Angeles)
Locale: English (United States)
Language: English
Delegated Approver:
Manager:
Receive Approval Request Emails: Only if I am an approver
Federation ID:
App Registration: One-Time Password Authenticator:
App Registration: Salesforce Authenticator:
Security Key (2DF or WebAuthn):
Lightning Login:
Temporary Verification Code (Expires in 1 to 24 Hours): [Generate]

Role: Marketing
User License: Salesforce
Profile: Platform 1
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Mobile Push Registrations:
Data.com User Type:
Accessibility Mode (Classic Only):
Debug Mode:
High-Contrast Palette on Charts:
Load Lightning Pages While Scrolling:
Salesforce CRM Content User:
Receive Salesforce CRM Content Email Alerts:
Receive Salesforce CRM Content Alerts as Daily Digest:
Make Setup My Default Landing Page:
Allow Forecasting:
No MRU Updates:
Call Center:
Phone:
Extension:
Fax:
Mobile:

30°C Mostly cloudy Search ENG US 3:06 pm 26/11/2025

Lightning | I-0001 | Flows | S | Developer | loyalty pr | low stock | Users | Sal | philippine | Abstract | Messenger | Google G | Chat

https://orgfarm-b81aad4963-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ManageUsers/page?address=%2F005gL0000AvMne%3Fnoredirect%3D1%26isUserEntit...

Click to go back (Alt+Left arrow), hold to see history

Setup Home Object Manager

Search Setup

Users

User Kol Mikaelson

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users

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

User Detail

Name: Kol Mikaelson
Alias: kmikla
Email: rymikaelson0@gmail.com [Verify]
Username: rymikaelson0@gmail.com
Nickname: User1764125602629632450
Title:
Company: AIV Computing
Department:
Division:
Address:
Time Zone: (GMT-08:00) Pacific Standard Time (America/Los_Angeles)
Locale: English (United States)
Language: English
Delegated Approver:
Manager:
Receive Approval Request Emails: Only if I am an approver
Federation ID:
App Registration: One-Time Password Authenticator:
App Registration: Salesforce Authenticator:
Security Key (2DF or WebAuthn):
Lightning Login:
Temporary Verification Code (Expires in 1 to 24 Hours):

Role: Inventory
User License: Salesforce
Profile: Platform 1
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Mobile Push Registrations:
Data.com User Type:
Accessibility Mode (Classic Only):
Debug Mode:
High-Contrast Palette on Charts:
Load Lightning Pages While Scrolling:
Salesforce CRM Content User:
Receive Salesforce CRM Content Email Alerts:
Receive Salesforce CRM Content Alerts as Daily Digest:
Make Setup My Default Landing Page:
Allow Forecasting:
No MRU Updates:
Call Center:
Phone:
Extension:
Fax:
Mobile:

30°C Mostly cloudy Search ENG US 3:07 pm 26/11/2025

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-b81aad4963-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ManageUsers/page?address=%2F005g00000Avam1%3FnoRedirect%3D1%26isUserEntit...>. The main content is the 'User Detail' page for a user named 'Niklaus Mikaelson'. The user has the role 'Sales' and is assigned to 'Platform 1'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, and Receive Approval Request Emails. The 'Permissions' section lists various permissions such as Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Salesforce CRM Content User, Receive Salesforce CRM Content Email Alerts, Receive Salesforce CRM Content Alerts as Daily Digest, Make Setup My Default Landing Page, Allow Forecasting, No MRU Updates, Call, Phone, Extension, Fax, and Mobile. The left sidebar shows navigation categories like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a selected 'Users' category. A message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

Permission Sets:

- Sales Permission Set: Created with Read, Create, Edit, and Delete permissions for the HandsMen Customer and HandsMen Order objects, and assigned to Niklaus Mikaelson.
- Inventory Permission Set: Created with Read and Edit permissions for HandsMen Products and Inventory, and assigned to Niklaus Mikaelson.
- Marketing Permission Set: Created with Read permissions for Marketing Campaigns and HandsMen Customers, and assigned to Ajay Mikaelson.

Lightning | I-0001 | Flows | Developer | loyalty pro | low stock | Permission | philippine | Abstract | Messenger | Google G | +

https://orgfarm-b81aad4963-dev-ed.develop.my.salesforce-setup.com/lightning/setup/PermSets/page?address=%2FOPSGL000009fjt%2Fe%3Fs%3DEntityPermissions%26o%3...

Setup Home Object Manager

Permission Sets

salesforce permission set

Find Settings | Close | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings HandsMen Customers

HandsMen Customers

Tab Settings

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/>

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	CreatedBy	<input 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_s	<input type="checkbox"/>	<input type="checkbox"/>
HandsMen Customer Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	LastModifiedBy	<input type="checkbox"/>	<input type="checkbox"/>
LastName	LastName_c	<input type="checkbox"/>	<input type="checkbox"/>
Loyalty Status	Loyalty_Status__c	<input type="checkbox"/>	<input type="checkbox"/>
Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	Phone_c	<input type="checkbox"/>	<input type="checkbox"/>
Total Purchases	Total_Purchases__c	<input type="checkbox"/>	<input type="checkbox"/>

Hot days ahead 31°C

Search

ENG US 3:21 pm 26/11/2025

Lightning | I-0001 | Flows | Developer | loyalty pro | low stock | Permission | philippine | Abstract | Messenger | Google G | +

https://orgfarm-b81aad4963-dev-ed.develop.my.salesforce-setup.com/lightning/setup/PermSets/0PSGL000009fjt/PermissionSetAssignment/home

Setup Home Object Manager

Permission Sets

salesforce permission set

Current Assignments

Full Name	Active	Role	Profile	User License	Expires On
Niklaus Mikaelson	<input type="checkbox"/>	Sales	Platform 1	Salesforce	

Hot days ahead 31°C

Search

ENG US 3:23 pm 26/11/2025

The screenshot shows the Salesforce Setup interface for creating a new permission set. The permission set is named "salesforce permission set" and is assigned to the "HandsMen Products" object. In the "Object Permissions" section, "Read" and "Edit" checkboxes are checked for "Read", "Create", "Edit", and "Delete". In the "Field Permissions" section, checkboxes for "Read Access" and "Edit Access" are present for fields like Created By, Name, Last Modified By, Owner, Price, SKU, and Stock Quantity. The "Current Assignments" section shows an assignment for "Niklaus Mikaelson" with the role "Sales" and profile "Platform 1".

Email Template

Classic Email Templates were created with the following labels:

- Order_Confirmation_Email
- Low Stock Alert
- Loyalty Program Email

Lightning | I-0001 | Flows | S | Developer | loyalty pr | low stock | Classic Em | philippine | Abstract | Messenger | Google G | +

https://orgfarm-b81aad4963-dev-ed.develop.my.salesforce-setup.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgI00000Bq8pZ%3Fsetupid%3DC...

Setup Home Object Manager Search Setup

Classic Email Templates

Order_Confirmation_Email

Preview your email template below:

Email Template Detail

Email Templates from Salesforce	Unified Public Classic Email Templates
Email Template Name	Order_Confirmation_Email
Template Unique Name	Order_Confirmation_Email
Classic Letterhead	Handmen_Threads
Email Layout	Free Form Letter
Encoding	Unicode (UTF-8)
Author	Bryson Nacoles (Changed)
Description	
Created By	Bryson Nacoles 11/25/2025, 7:18 PM
Modified By	Bryson Nacoles 11/25/2025, 7:18 PM

Available For Use ✓
Last Used Date
Times Used

Email Template

Subject: Your Order has been Confirmed!

HTML Preview

Dear {HandsMen_Order__c} HandsMen_Customer__c,

Your order # {HandsMen_Order__c} has been confirmed!

Thank you for shopping with us.

Best Regards,
Sales Team

Send Test and Verify Merge Fields

Edit Properties Edit HTML Version Edit Text Version Delete Clone

Heavy rain Tomorrow

Search

ENG US 3:35 pm 26/11/2025

Lightning | I-0001 | Flows | S | Developer | loyalty pr | low stock | Classic Em | philippine | Abstract | Messenger | Google G | +

https://orgfarm-b81aad4963-dev-ed.develop.my.salesforce-setup.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgI00000BpsT9%3Fsetupid%3DC...

Setup Home Object Manager Search Setup

Classic Email Templates

Low Stock Alert

Preview your email template below:

Email Template Detail

Email Templates from Salesforce	Unified Public Classic Email Templates
Email Template Name	Low_Stock_Alert
Template Unique Name	Low_Stock_Alert
Encoding	Unicode (UTF-8)
Author	Bryson Nacoles (Changed)
Description	
Created By	Bryson Nacoles 11/25/2025, 7:27 PM
Modified By	Bryson Nacoles 11/25/2025, 7:27 PM

Available For Use ✓
Last Used Date
Times Used

Email Template

Subject: Low Stock Alert Email

Plain Text Preview

Dear {Inventory__c},

This is to inform you that the stock for the following product is running low:

Product Name: Quantity: {Inventory__c}

Please take necessary steps to restock this item immediately.

Best Regards
Inventory Monitoring System

Send Test and Verify Merge Fields

Edit Delete Close

Attachments Attach File

No records to display

Heavy rain Tomorrow

Search

ENG US 3:35 pm 26/11/2025

The screenshot shows the 'Classic Email Templates' page in Salesforce. A new email template named 'Loyalty Program Email' has been created. The template details include:

- Email Template Name:** Loyalty_Program_Email
- Template Unique Name:** HandsMen_Loyalty_Program_Email
- Classic Letterhead:** HandsMen_Threads
- Email Layout:** Free Form Letter
- Encoding:** Unicode (UTF-8)
- Author:** Bryson Nuckles (Change)
- Description:** Congratulations! You are now a HandsMen_Customer_c Loyalty_Status__c member and you are eligible for the Loyalty Rewards Program. Enjoy exclusive discounts, early access to offers, and special member benefits.
- Created By:** Bryson Nuckles (Change)
- Modified By:** Bryson Nuckles (Change)
- Last Used Date:** 11/25/2025, 7:33 PM
- Times Used:** 1

The email template preview shows a red header and a body containing the loyalty program message.

An Email Alert was also created.

The screenshot shows the 'Email Alerts' page in Salesforce. Three new email alerts have been created:

Action	Description	Email Template Name	Object	Last Modified Date
Edit	Low Stock Alert	Low Stock Alert	Inventory	11/25/2025
Edit	Loyalty program email	Loyalty_Program_Email	HandsMen Customer	11/25/2025
Edit	Order Confirmation Email Alert	Order Confirmation_Email	HandsMen Order	11/25/2025

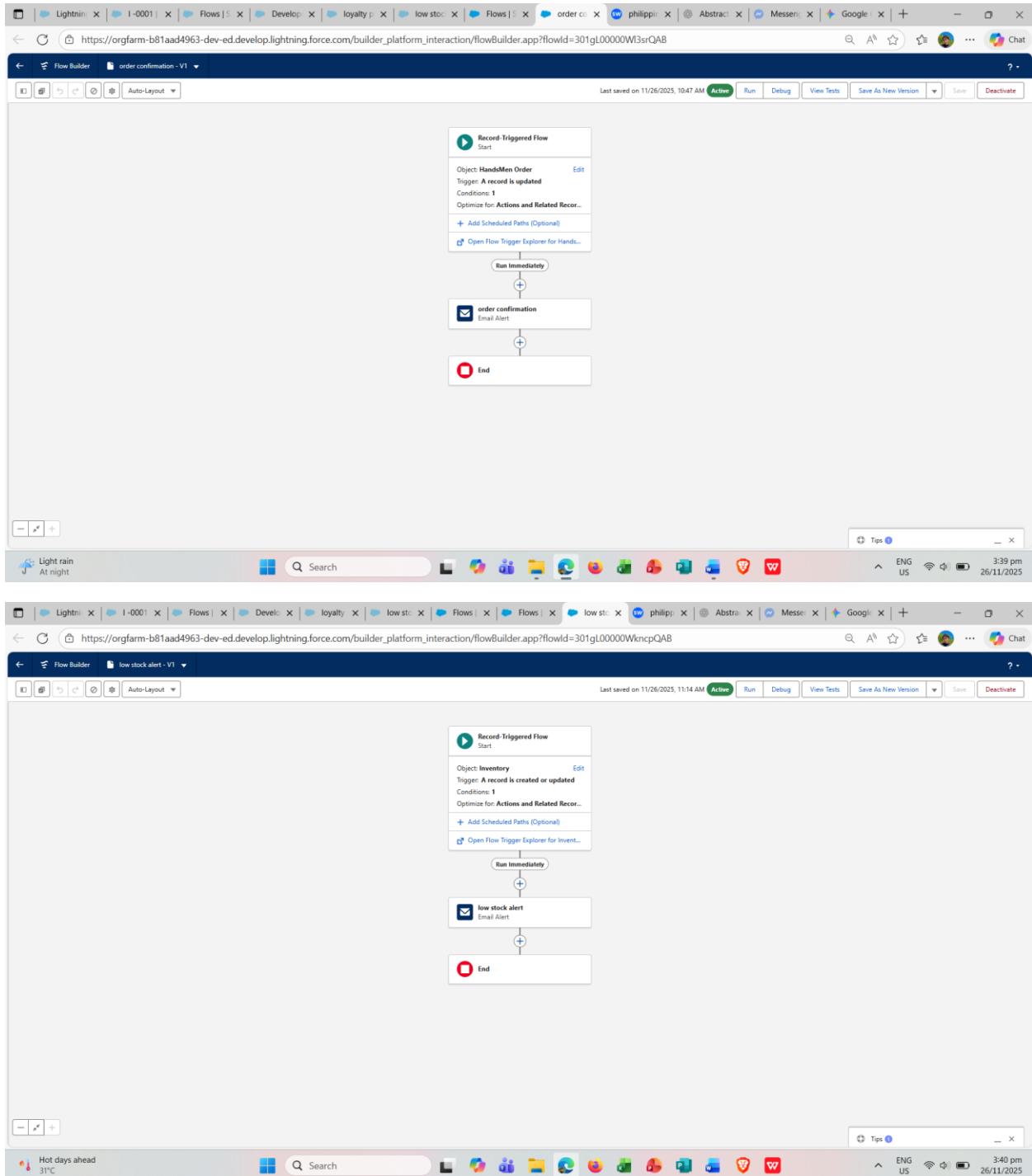
Flows

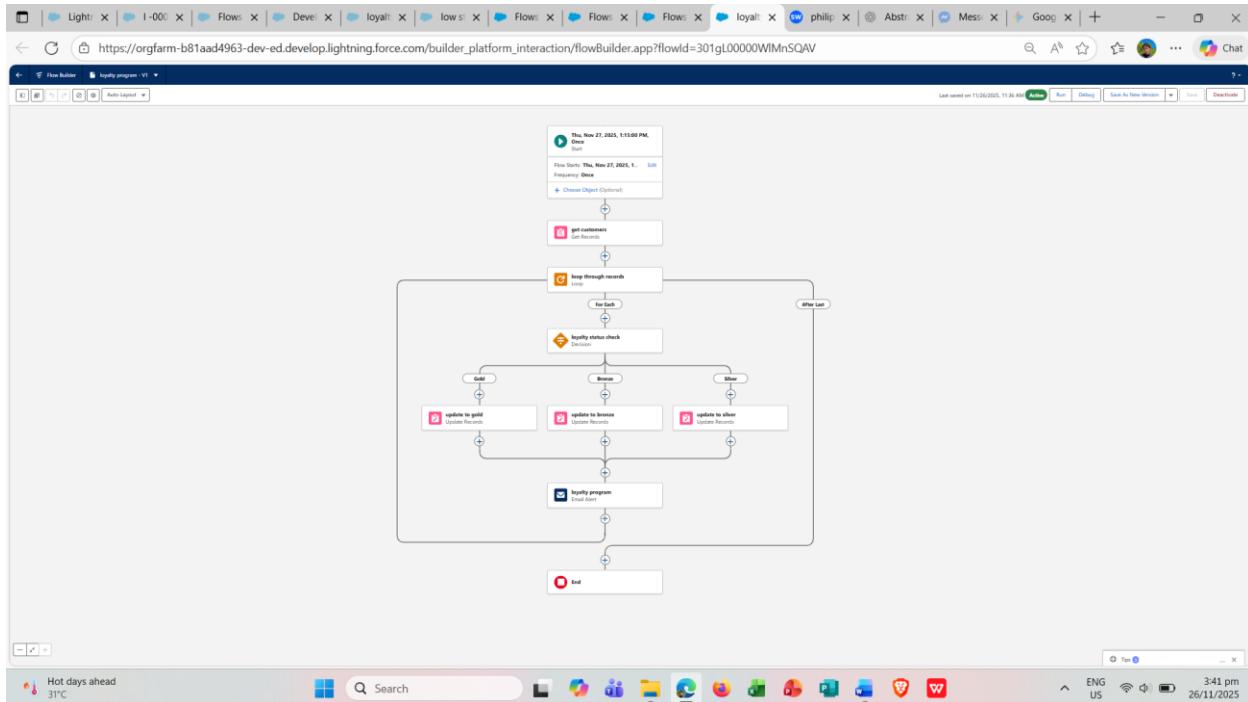
Record-Triggered Flows were created for the following automations:

- Order Confirmation Flow

➤ Low Stock Alert Flow

➤ Loyalty Status Flow





Automation Using Apex

- **Apex Triggers** were created with the following trigger names: Order Trigger, Stock Deduction, and Loyalty Status Update.
- An **Apex Class** was created named “OrderTriggerHandler”.
- A **Batch Apex** was created named “InventoryBatchJob”.

```

1 trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
2
3     // Collect all Product IDs
4     Set<Id> productIds = new Set<Id>();
5     for (HandsMen_Order__c order : Trigger.new) {
6         if (order.HandsMen_Product__c != null) {
7             productIds.add(order.HandsMen_Product__c);
8         }
9     }
10
11    // Query product prices
12    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
13        [SELECT Id, Price__c
14         FROM HandsMen_Product__c
15         WHERE Id IN :productIds]
16    );
17
18    // Compute order total
19    for (HandsMen_Order__c order : Trigger.new) {
  
```

User	Application	Operation	Time	Status	Read	Size
Reyson Naples	Browser	/aura	11/26/2025, 12:16:13 PM	Success	Unread	315 bytes
Reyson Naples	Unknown	/services/data/v65.0/tooling/executeA...	11/26/2025, 12:08:56 PM	Success	Unread	2.88 KB
Reyson Naples	Browser	/aura	11/26/2025, 12:03:50 PM	Success	Unread	13.72 KB
Reyson Naples	Unknown	common.api.soap.DirectSoap	11/26/2025, 12:03:50 PM	Success	Unread	527 bytes
Reyson Naples	Browser	/aura	11/26/2025, 12:01:08 PM	Success	Unread	8.34 KB
Reyson Naples	Unknown	common.api.soap.DirectSoap	11/26/2025, 12:01:07 PM	Success	Unread	522 bytes

Flood warning
In effect

```

1 * trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    if (productIds.isEmpty()) return;
11
12    // Query related inventories based on product
13    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
14        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
15         FROM Inventory__c
16         WHERE HandsMen_Product__c IN :productIds]
17    );
18
19    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();

```

Logs Test Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
Reyson Naples	Browser	/aura	11/26/2025, 12:16:13 PM	Success	Unread	315 bytes
Reyson Naples	Unknown	/services/data/v65.0/tooling/executeA...	11/26/2025, 12:08:56 PM	Success	Unread	2.88 KB
Reyson Naples	Browser	/aura	11/26/2025, 12:03:50 PM	Success	Unread	13.72 KB
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Reyson Naples	Unknown	common.api.soap.DirectSoap	11/26/2025, 12:01:07 PM	Success	Unread	522 bytes

Filter Click here to filter the log list

Flood warning In effect

```

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) {

```

Logs Test Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
Reyson Naples	Browser	/aura	11/26/2025, 12:16:13 PM	Success	Unread	315 bytes
Reyson Naples	Unknown	/services/data/v65.0/tooling/executeA...	11/26/2025, 12:08:56 PM	Success	Unread	2.88 KB
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Reyson Naples	Unknown	common.api.soap.DirectSoap	11/26/2025, 12:01:07 PM	Success	Unread	522 bytes

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Flood warning In effect

Phase 3: Testing & QA

- During this phase, all components of the Salesforce CRM system were thoroughly tested to verify their proper functionality. The primary objective was to detect and resolve any issues prior to deployment. Screenshots were taken throughout the testing process to document the outcomes.

The screenshot shows the HandsMen Threads Salesforce Lightning Experience. The top navigation bar includes links for HandsMen Customers, HandsMen Orders, HandsMen Products, Inventory, Marketing Campaigns, Reports, Dashboards, Accounts, and More. The main content area displays a "Recently Viewed" list for "HandsMen Customers". The list shows one item: "john" (customer name). The interface includes a search bar, a toolbar with buttons for New, Import, Change Owner, and Assign Label, and a list of actions (e.g., Edit, Delete, Share) for each item. The bottom status bar shows weather information ("Heavy rain Tomorrow"), system icons, and the date/time ("26/11/2025 3:53 pm").

The screenshot shows the HandsMen Threads Salesforce Lightning Experience. The top navigation bar includes links for HandsMen Customers, HandsMen Orders, HandsMen Products, Inventory, Marketing Campaigns, Reports, Dashboards, Accounts, and More. The main content area displays a "Recently Viewed" list for "HandsMen Orders". The list shows three items: "O-0003", "O-0002", and "O-0001" (order numbers). The interface includes a search bar, a toolbar with buttons for New, Import, Change Owner, and Assign Label, and a list of actions (e.g., Edit, Delete, Share) for each item. The bottom status bar shows weather information ("Light rain At night"), system icons, and the date/time ("26/11/2025 3:53 pm").

The screenshot shows the Salesforce Lightning interface for the HandsMen Threads organization. The user is viewing the 'HandsMen Products' list. The URL in the browser is https://orgfarm-b81aad4963-dev-ed.lightning.force.com/lightning/o/HandsMen_Product_c/list?filterName=_Recent. The page displays a single item: 't-shirt cloth'. The interface includes a search bar, a toolbar with buttons for New, Import, Change Owner, and Assign Label, and a list of actions (Edit, Delete, etc.). The system status bar at the bottom shows 'Light rain At night' and the date '26/11/2025'.

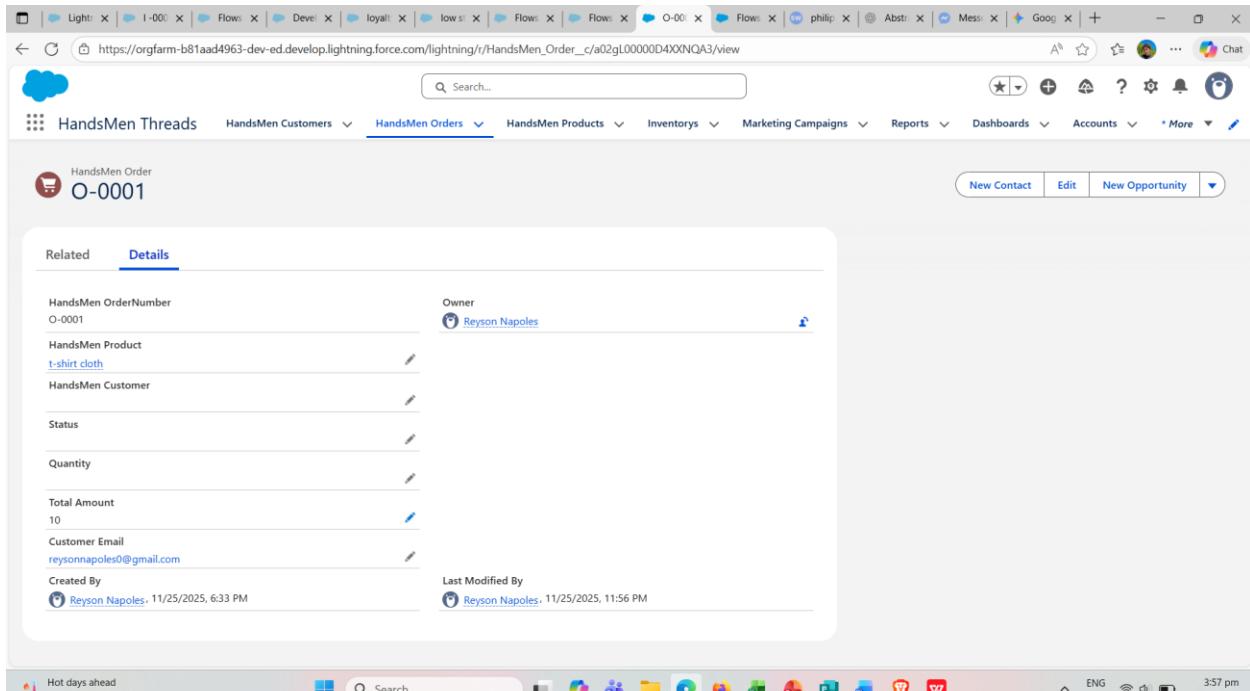
The screenshot shows the Salesforce Lightning interface for the HandsMen Threads organization. The user is viewing the 'Inventory' list. The URL in the browser is https://orgfarm-b81aad4963-dev-ed.lightning.force.com/lightning/o/Inventory_c/list?filterName=_Recent. The page displays a single item: 'I-0001'. The interface includes a search bar, a toolbar with buttons for New, Import, Change Owner, and Assign Label, and a list of actions (Edit, Delete, etc.). The system status bar at the bottom shows 'Light rain At night' and the date '26/11/2025'.

Phase 4: Deployment & Training

- The fully developed Salesforce CRM system was successfully migrated from the development environment to the production environment. Following deployment, the Sales, Inventory, and Marketing teams received training on the new features, workflows, and automation processes. Ongoing post-go-live support was provided to ensure smooth adoption and address any issues.

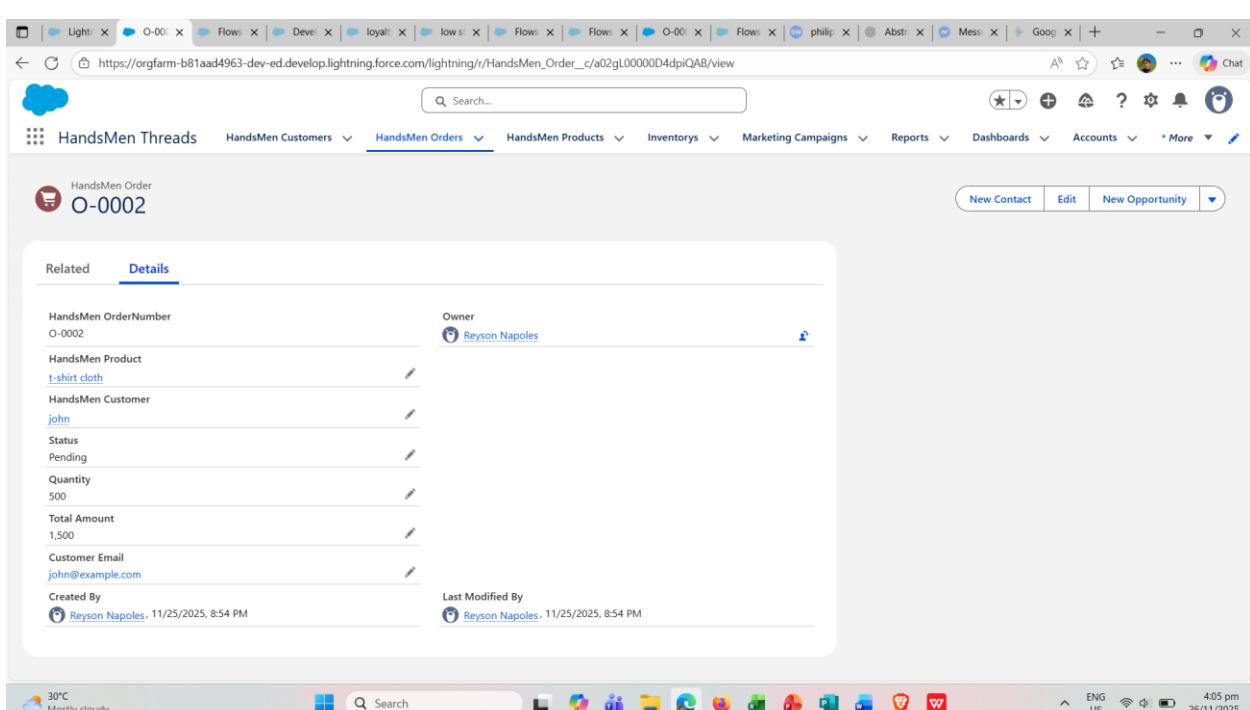
Deployment Proof

- An Apex Trigger was implemented to automatically update the **Total Amount** on Orders. The “Run All” function was executed on the Order Total Trigger to confirm proper operation.



Screenshot of a Salesforce Lightning Order detail page for O-0001. The page shows the following details:

Field	Value
HandsMen OrderNumber	O-0001
Owner	Reyson Napoles
HandsMen Product	t-shirt cloth
HandsMen Customer	
Status	
Quantity	
Total Amount	10
Customer Email	reysonnapoles0@gmail.com
Created By	Reyson Napoles - 11/25/2025, 6:33 PM
Last Modified By	Reyson Napoles - 11/25/2025, 11:56 PM



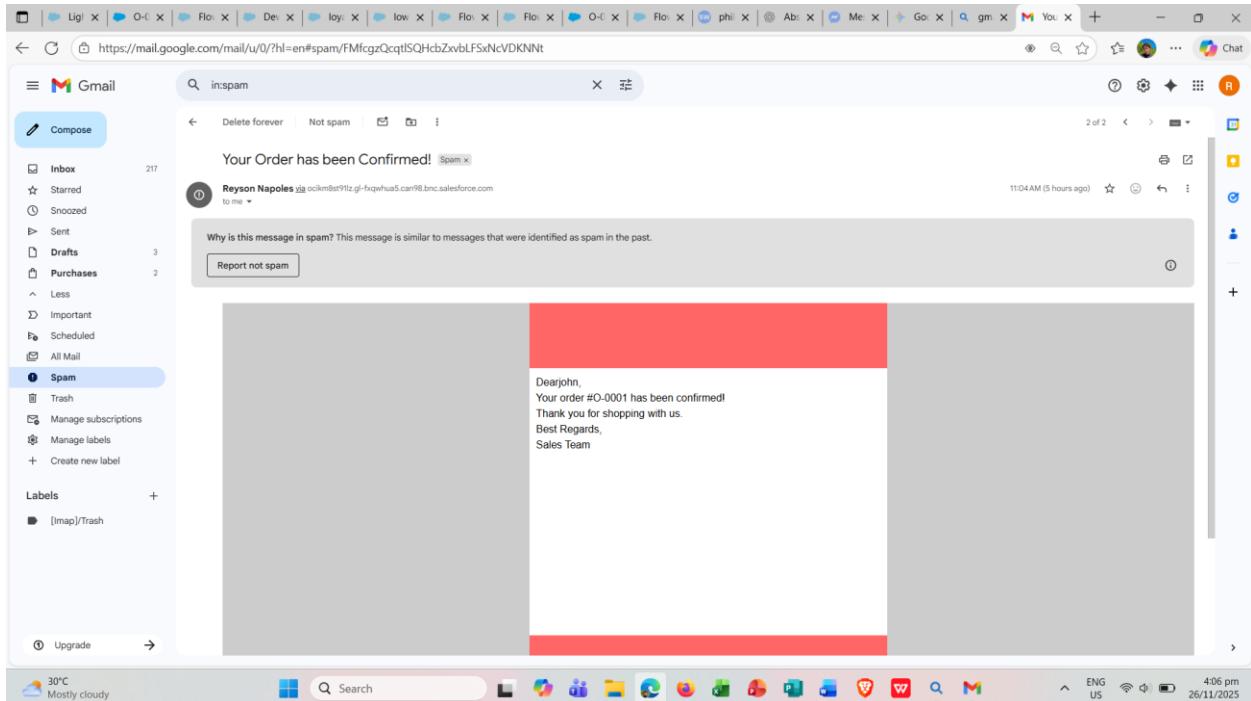
Screenshot of a Salesforce Lightning Order detail page for O-0002. The page shows the following details:

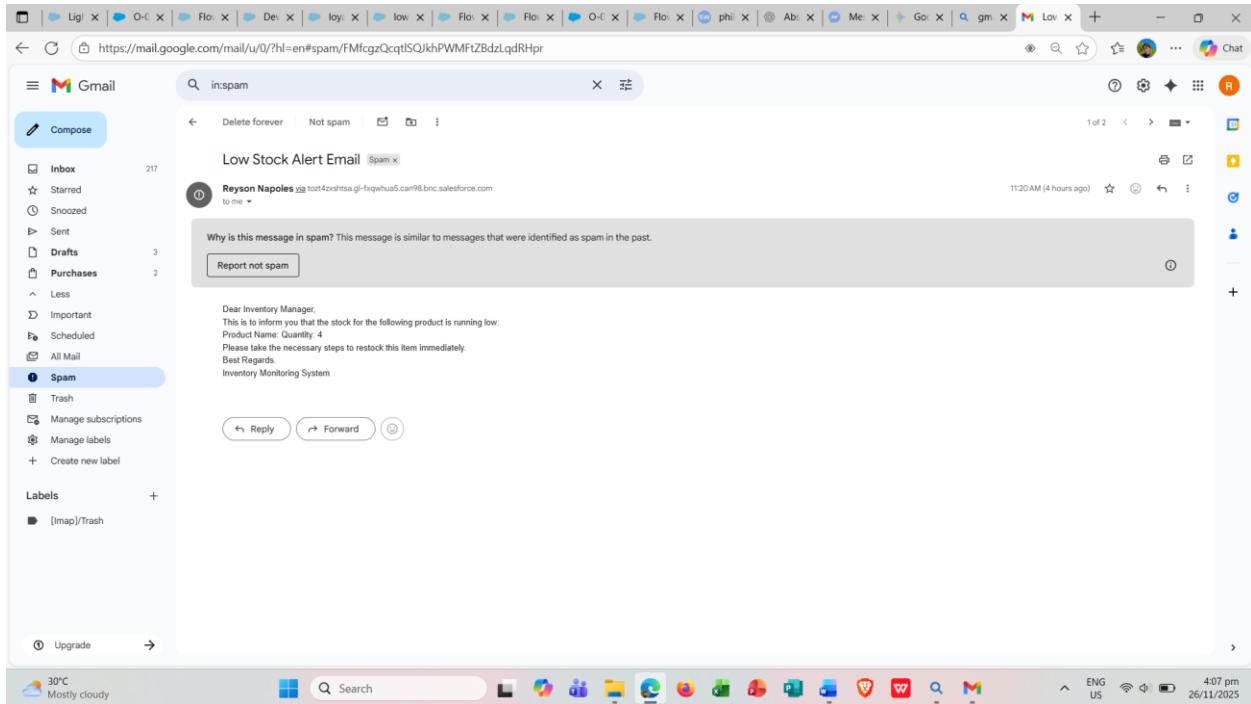
Field	Value
HandsMen OrderNumber	O-0002
Owner	Reyson Napoles
HandsMen Product	t-shirt cloth
HandsMen Customer	john
Status	Pending
Quantity	500
Total Amount	1,500
Customer Email	john@example.com
Created By	Reyson Napoles - 11/25/2025, 8:54 PM
Last Modified By	Reyson Napoles - 11/25/2025, 8:54 PM

Post-Deployment Automation Proof

The system leverages an Email Template to perform the following automated tasks:

- Send an order confirmation email to customers whenever a new order is created.
- Automatically update product inventory whenever an order is created or modified.
- Run daily to update customer loyalty status based on total purchase amounts.





CONCLUSION

The HandsMen Threads CRM system, developed on the Salesforce platform, effectively optimizes critical business processes, encompassing customer management, product cataloging, order processing, inventory monitoring, and loyalty program automation. Utilizing Salesforce functionalities such as Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the system facilitates accurate data entry, ensures real-time updates, and enhances the overall customer experience. Furthermore, the implementation of automation and well-defined user roles reduces the potential for manual errors, accelerates operational workflows, and provides comprehensive insights into sales performance and inventory status.