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**POLYTECHNIC UNIVERSITY OF THE PHILIPPINES**

Office of the Vice President for Branches and Satellite Campuses

**LOPEZ QUEZON BRANCH**

**Bachelor of Science in Information Technology**

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

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## Project Overview

HandsMen Threads is a high-end and luxury organization in the fashion industry, currently they are in a transition to implement transformative Salesforce solutions to streamline data management, ensure data integrity, and elevate customer relationships in the fashion industry. The project establishes a comprehensive data model to centralize all business data, enabling seamless information flow and supporting data-driven decision-making across the organization.

The HandsMen Thread tailored CRM includes primary custom objects such as Customer, Order, Product, Inventory, and Marketing Campaign. It also utilizes key business activities automations using custom flows such as Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex Triggers.

This project maintains its integrity and security of data by including role-based security model suited for Marketing, Sales, and Inventory and by also applying strict data validation rules. It also encompasses an Apex process to manage and monitor the stocks in the inventory.

Overall, this project focuses on establishing a robust Salesforce data model and implementing key automated processes to centralize all business data, enhance customer relations, and drive data-driven decision-making for HandsMen Threads.

## Objective

The primary objective of this project is to provide the organization a platform that streamlines the business flow, implements strict data security, and enhances customer relationship.

To achieve this goal, the core objectives of this project are:

- **Centralize Data:** Establish a comprehensive, unified data model for all business data to ensure seamless information flow.
- **Enhance Data Integrity:** Implement features to maintain the **accuracy and consistency of data** directly from the user interface (UI).
- **Improve Customer Relations:** Introduce automated processes to increase engagement and provide personalized customer experiences.
- **Boost Operational Efficiency:** Automate internal workflows, such as stock alerts and bulk order processing, to optimize operations.



## Technology Used with Description

### Salesforce

Salesforce is a leading American cloud-based software company best known for its Customer Relationship Management (CRM) platform. It provides a wide range of applications that help businesses connect with their customers and manage key aspects of their operations, including sales, customer service, marketing, and e-commerce, all through the internet (the cloud).

### Custom Objects

Custom objects are created to be used by a business-specific information.

Examples:

- HandsMen\_Customer\_\_c
- HandsMen\_Order\_\_c
- HandsMen\_Product\_\_c
- Inventory\_\_c

### Profiles

A Profile is a fundamental and mandatory component of the security and user access model. It essentially controls the functional access and user interface settings for a group of users.

Example:

- Platform 1

### Roles

A Role is a security and access feature that primarily controls what data a user can see in the organization, specifically at the record level. It is used to create a Role Hierarchy that mirrors your company's organizational chart, often used to determine data sharing and reporting structure.

Example:

- Sales
- Marketing
- Inventory



## Permission Sets

A Permission Set is a collection of settings and permissions that allows administrators to extend a user's functional access without changing their assigned Profile.

Example:

- Sales Permission Set
- Marketing Permission Set
- Inventory Permission Set

## Validation Rules

Validation Rules are essential tools used to verify that the data a user enters into a record meets specific standards before they can successfully save the record.

Example:

- Email must contain "@gmail.com"
- Stock cannot be 0
- Amount cannot be 0

## Email Templates

An Email Template is a pre-designed, reusable structure for composing emails sent from the platform.

Example:

- Order Confirmation Email
- Low Stock Alert Email
- Loyalty Program Email

## Email Alerts

An Email Alert is a reusable configuration that defines the email message, its recipients, and the sender, but does not define when the email is sent.

Example:

- Order Confirmation Email Alert – sent when an order is placed.
- Low Stock Email Alert – sent when stock quantity drops less than 5.

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## Flows

Flow is an application that automates complex business processes by collecting data and then performing actions with that data, all without the need to write traditional code.

Example:

- Order Confirmation Flow (Record-Triggered Flow) – triggered when order status is confirmed.

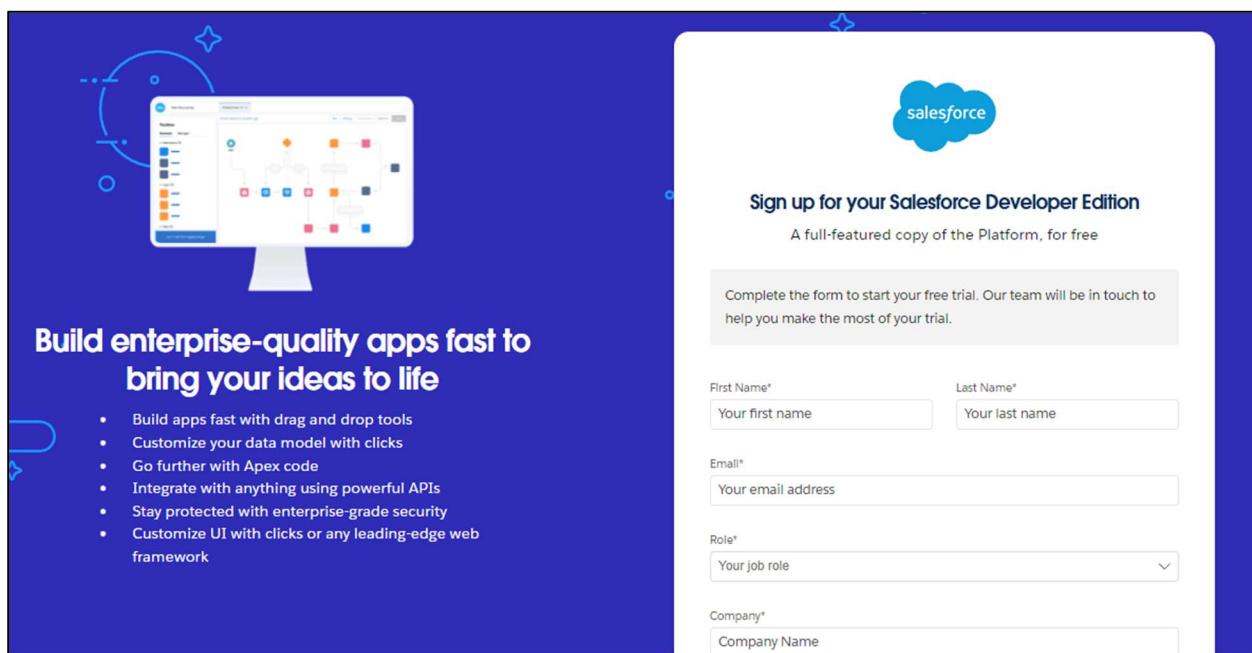
## Apex

Apex is used when the complexity of a business rule or the need for integration exceeds the capabilities of declarative tools

## Execution of Project Phase

- 1) A Salesforce Developer Org was created through the link:

<https://developer.salesforce.com/signup>



- 2) Custom Object Creation

- HandsMen Customer – stores customer information such as name, email, phone, and loyalty status.
- HandsMen Product – stores product catalog details such as SKUs, price, and available stock.



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- HandsMen Order – records customer order information that includes details such as customer name, product, quantity, status, and order date.
- Inventory – monitors and tracks each product's stock quantity and warehouse location.
- Marketing Campaign – stores details such as schedule and target audience of a campaign.

#### 3) Creating the Lightning App

- Create a custom lightning app that is named HandsMen Threads to centralized all operations.
- Its tab includes: HandsMen Order, HandsMen Product, HandsMen Customer, Inventory, Marketing Campaign, Reports, and others.
- This app is assigned to a System Administrator.

#### 4) Validation Rules

This ensures data integrity and enhances data accuracy. Some of the rules implemented are:

- In Customer Object, email field is validated

The screenshot shows a Salesforce lightning component titled "New HandsMen Customer". The form has a header note: "\* = Required Information". It contains several input fields under a "Information" section: "HandsMen Customer Name" (Lionel Messi), "Email" (thegoat), "Phone" (1234567890), "Loyalty Status" (None), "FirstName" (Lionel), and "LastName" (Messi). Below the form is a message box with the title "We hit a snag." and the message "Review the following fields: Email". At the bottom are buttons for "Cancel", "Save & New", and "Save".

Fig: Customer Object Email Field Validation Rule

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## 5) Role and Profile Setup

- Roles were created for different departments, this are:
  - i) Sales
  - ii) Marketing
  - iii) Inventory
- The Profile named ‘Platform 1’ was created from the clone of ‘Standard User’, this gives access to necessary custom object.

The screenshot shows the Salesforce Setup Profiles page. At the top, there's a header with a user icon, 'SETUP', and 'Profiles'. Below the header, it says 'Profile Platform 1'. It notes that users with this profile have permissions and page layouts listed below. It also mentions that administrators can edit a user's profile by editing that user's personal information. There's a note about Record Types and Edit links in Record Type Settings. A list of permissions follows: Login IP Records, Enabled Apex Class Access, Enabled Visualforce Page Access, Enabled External Data Source Access, Enabled Named Credential Access, Enabled External Credential Principal Access, Enabled Custom Metadata Type Access, Enabled Custom Setting Definitions Access, Enabled Flow Access, Enabled Service Presence Status Access, and Enabled Custom Permissions. Below this is a 'Profile Detail' section with fields for Name (Platform 1), User License (Salesforce), Description, Created By (Lawrence Shane Joshua Lim, 11/26/2025, 4:59 AM), and Modified By (Lawrence Shane Joshua Lim, 11/26/2025, 7:10 AM). A 'Custom Profile' checkbox is checked. Under 'Page Layouts', there are two main sections: 'Standard Object Layouts' and 'Alternative Payment Method'. 'Standard Object Layouts' includes Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, Asset Action, Asset Action Source, Asset Relationship, Asset State Period, Assigned Resource, and Associated Location. 'Alternative Payment Method' includes Global Layout, Macro, Object Milestone, Operating Hours, Opportunity, Opportunity Product, Order, Order Product, Payment, Payment Authorization, Payment Authorization Adjustment, Payment Gateway, and Payment Gateway Log. Each item has a link to its view assignment.

Fig: Profile Platform 1



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A screenshot of a web-based application titled "SETUP Roles". The main title is "Creating the Role Hierarchy". A sub-instruction says, "You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role." Below this, a section titled "Your Organization's Role Hierarchy" contains a tree view of roles. At the top of the tree is "Polytechnic University of the Philippines", which has several children: "CEO", "CFO", "COO", "Inventory", "Marketing", "Sales", "SVP, Customer Service &amp; Support", "SVP, Human Resources", and "SVP, Sales &amp; Marketing". Each of these nodes has "Edit | Del | Assign" links and an "Add Role" link underneath. There are also "Collapse All" and "Expand All" buttons at the top of the tree.

Fig: Setup Roles



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## 6) Create Users

- Users were added and given a profile and role that grants access and proper control

The screenshot shows the Salesforce User Setup page for a user named 'Kol Mikaelson'. The page is divided into several sections:

- User Detail:** Contains fields for Name (Kol Mikaelson), Alias (kmika), Email (joshualim142@gmail.com), Username (joshualim142@green112025@gmail.com), Nickname (kmikaelson), 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), and Receive Approval Request Emails (Only if I am an approver). It also lists App Registrations: One-Time Password Authenticator, Salesforce Authenticator, Security Key (U2F or WebAuthn), and Lightning Login.
- Role:** Shows the user is assigned to the 'Inventory' profile and has the 'Salesforce Platform 1' license.
- Inventory:** Lists various user roles such as Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User.
- Mobile Push Registrations:** Includes options for Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling (checked), Salesforce CRM Content User (checked), Receive Salesforce CRM Content Email Alerts (checked), Receive Salesforce CRM Content Alerts as Daily Digest (checked), Make Setup My Default Landing Page, Allow Forecasting, No MRU Updates, Call Center, Phone, Extension, and Fax.

Fig: Setup Users

## 7) Create Classic Letterhead, Email Template, and Email Alerts

- Create and design Classic Letterhead
- Create the following Email Template and integrate the Classic Letterhead as needed:
  - Order Confirmation Email
  - Low Stock Alert Email
  - Loyalty Program Email
- Configure Email Alerts and integrate with flows.



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The screenshot shows the 'Classic Letterheads' setup page. At the top, there's a header with a mail icon and the word 'SETUP'. Below it, the title 'Classic Letterheads' is displayed. Underneath, a section titled 'Letterhead' shows a preview for 'Handsman Threads'. The preview area has a blue header and footer. On the left, under 'Classic Letterhead Detail', there are fields for 'Letterhead Label' (Handsman Threads), 'Letterhead Unique Name' (Handsman\_Threads), 'Available For Use' (checked), 'Description' (Handsman Threads), and 'Created By' (Lawrence Shane Joshua Lim, 11/26/2025, 5:21 AM). On the right, 'Modified By' is also Lawrence Shane Joshua Lim, with the date 11/26/2025, 5:28 AM. A vertical scroll bar is visible on the right side of the preview area.

Fig: Setup Classic Letterhead

The screenshot shows the 'Classic Email Templates' setup page. At the top, there's a header with a mail icon and the word 'SETUP'. Below it, the title 'Classic Email Templates' is displayed. Underneath, a section titled 'HTML Email Template' shows a preview for 'Order Confirmation Email'. The preview area has a blue header and footer. On the left, under 'Email Template Detail', there are fields for 'Email Template Name' (Order Confirmation Email), 'Template Unique Name' (Order\_Confirmation\_Email), 'Classic Letterhead' (Handsman\_Threads), 'Email Layout' (Free Form Letter), 'Encoding' (Unicode (UTF-8)), 'Author' (Lawrence Shane Joshua Lim [Change]), 'Description' (Lawrence Shane Joshua Lim, 11/26/2025, 5:26 AM), and 'Created By' (Lawrence Shane Joshua Lim, 11/26/2025, 5:26 AM). On the right, 'Available For Use' is checked, and 'Last Used Date' and 'Times Used' are listed. A vertical scroll bar is visible on the right side of the preview area.

Fig: Setup Email Template



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The screenshot shows the 'Email Alerts' setup page. At the top, there's a 'SETUP' button and a 'Help for this Page' link. The main section is titled 'Email Alert' and 'Order Confirmation Email Alert'. It displays the 'Email Alert Detail' configuration, including fields for Description (Order Confirmation Email Alert), Unique Name (Order\_Confirmation\_Email\_Alert), From Email Address (Current User's email address), Recipients (Email Field: Customer Email), Additional Emails, and Created By (Lawrence Shane Joshua Lim, 11/26/2025, 5:35 AM). On the right, it shows the 'Email Template' (Order Confirmation Email) and 'Object' (HandsMen Order). Below this, sections for 'Rules Using This Email Alert', 'Approval Processes Using This Email Alert', and 'Entitlement Processes Using This Email Alert' are shown, each stating 'This alert is currently not used by any rules', 'processes', or 'entitlement processes'. A 'Flows Using This Email Alert' section lists a single flow named 'Order Confirmation Flow' with version 1, object 01gL000003CeCr, and status Active. At the bottom, there are links to 'Back To Top' and 'Always show me ▾ more records per related list'.

Fig: Setup Email Alert

## 8) Flow Integrations

- Order Confirmation Flow (Record-Triggered Flow) – sends a customized email to the customer that confirms their order details and status.

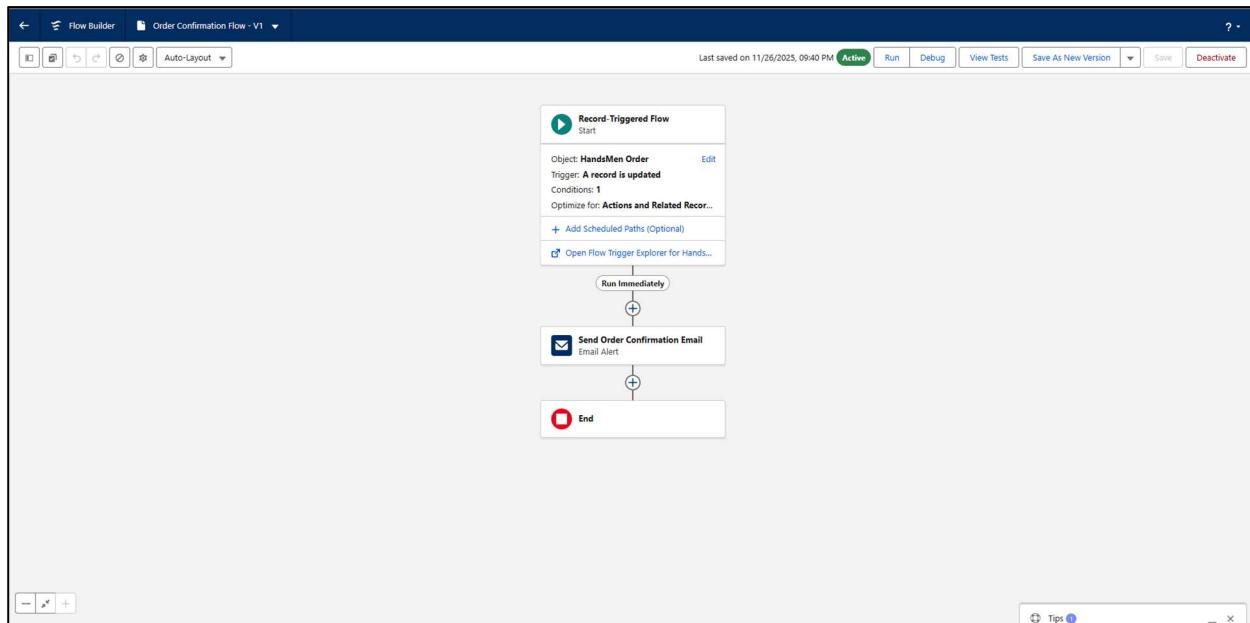


Fig: Order Confirmation Flow

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- Stock Alert Flow (Record-Triggered Flow) – sends an email alerting when stock quantity in inventory drops less than 5.

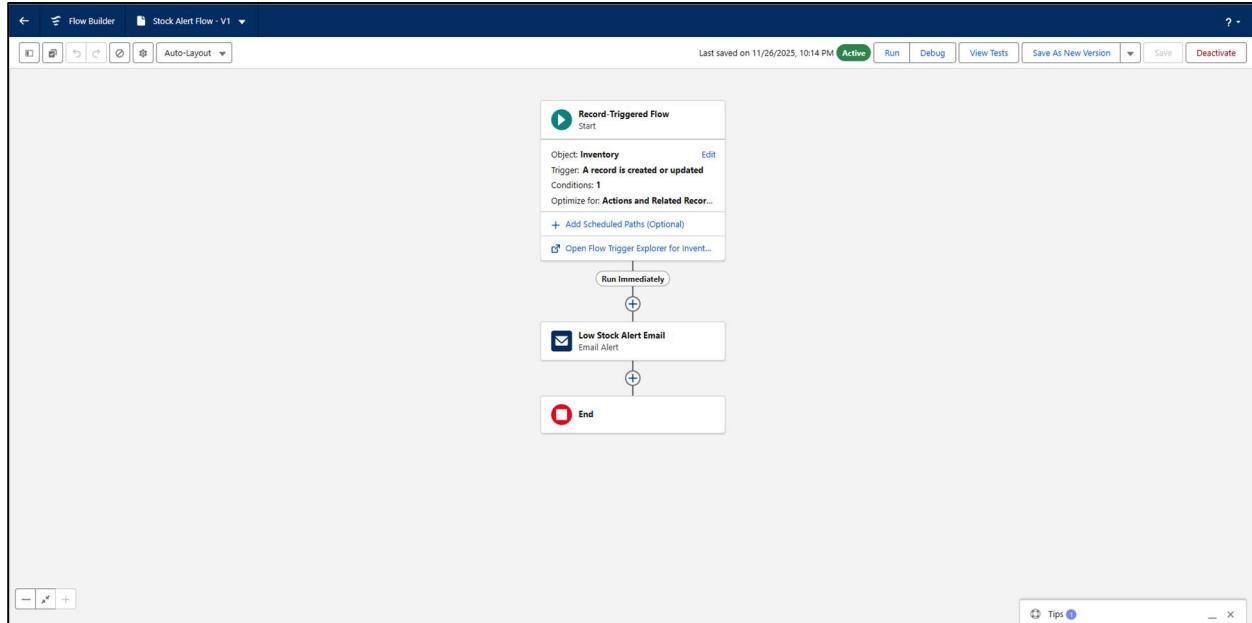


Fig: Stock Alert Flow



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- Loyalty Status Update Flow – this flow sends a personalized email to a customer that is qualified for a certain level of the loyalty program.

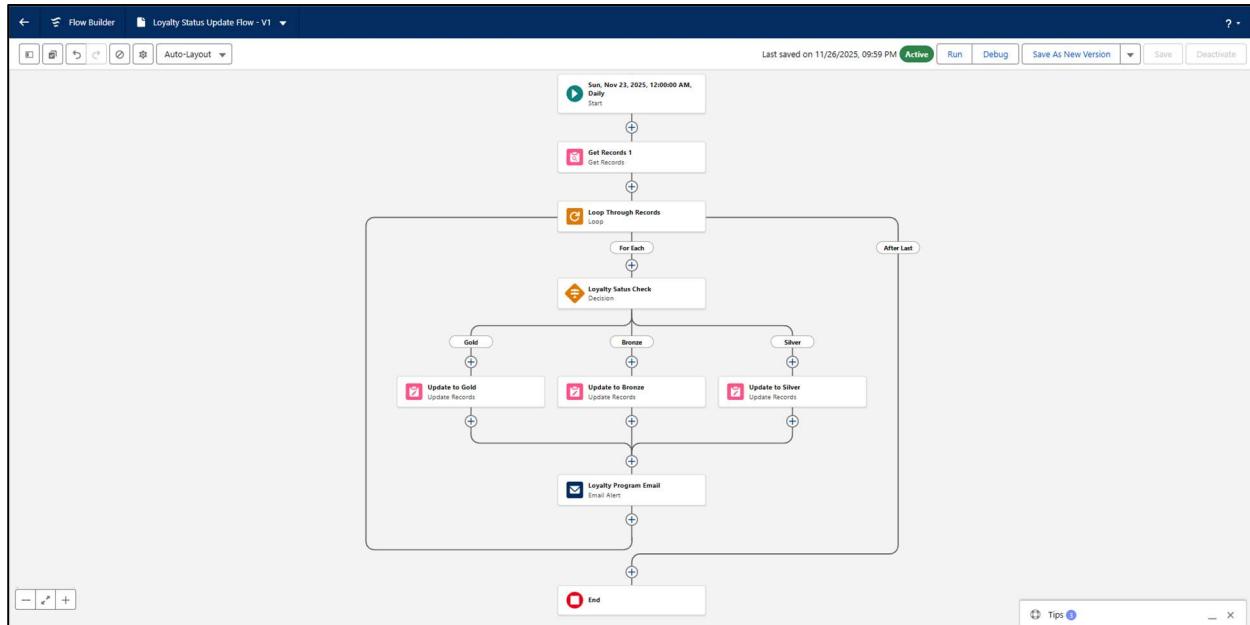


Fig: Loyalty Status Update Flow

## 9) Create Apex Triggers

- Update Order Total – Object: Order

This auto-update the total amount based on the quantity and product price when saved.

- Stock Deduction – Object: Inventory

This reduces the stock quantity in inventory when the order status is updated to confirmed.



## Screenshots

The screenshot shows a Salesforce Lightning interface for the 'HandsMen Threads' app. The top navigation bar includes links for 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventorys', 'Reports', 'Dashboards', 'Accounts', 'Contacts', and 'Marketing Campaigns'. A search bar at the top right says 'Search...'. Below the navigation is a section titled 'Recently Viewed' with a dropdown arrow and a refresh icon. It displays a list of 2 items updated a few seconds ago, with checkboxes next to each entry. The entries are: 1. Aira Napiri and 2. John.

Fig: HandsMen Threads Lightning App

The screenshot shows a detailed view of a customer record in the 'HandsMen Threads' app. The top navigation bar is identical to the previous screenshot. The main area shows a customer record for 'Lionel Messi'. The 'Details' tab is selected. The record includes fields for 'HandsMen Customer Name' (Lionel Messi), 'Email' (thegroat@gmail.com), 'Phone', 'Loyalty Status', 'FirstName' (Lionel), 'LastName' (Messi), 'FullName' (Lionel Messi), and 'Total Purchases'. The 'Owner' field shows 'Lawrence Shane Joshua Lim'. At the bottom, it shows 'Created By' (Lawrence Shane Joshua Lim) and 'Last Modified By' (Lawrence Shane Joshua Lim) both on 11/27/2025, 8:31 AM.

Fig: HandsMen Thread Customer Details

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HandsMen Threads HandsMen Customers HandsMen Orders HandsMen Products Inventory Reports Dashboards Accounts Contacts Marketing Campaigns

HandsMen Product T-shirt

New Contact Edit New Opportunity

Related	Details
HandsMen Product Name	T-shirt
SKU	12938746
Price	\$210
Stock Quantity	15
Created By	Lawrence Shane Joshua Lim, 11/26/2025, 6:14 AM
Owner	Lawrence Shane Joshua Lim
Last Modified By	Lawrence Shane Joshua Lim, 11/27/2025, 8:32 AM

Fig: HandsMen Thread Product Details

HandsMen Threads HandsMen Customers HandsMen Orders HandsMen Products Inventory Reports Dashboards Accounts Contacts Marketing Campaigns

Inventory I -0001

New Contact Edit New Opportunity

Related	Details
Inventory Number	I-0001
HandsMen Product	T-shirt
Stock Quantity	15
Stock Status	Available
Warehouse	Warehouse
Created By	Lawrence Shane Joshua Lim, 11/26/2025, 6:15 AM
Last Modified By	Lawrence Shane Joshua Lim, 11/27/2025, 8:33 AM

Fig: HandsMen Thread Inventory Details



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Loyalty Program Email Spam x

Loyalty Program Email via k5fec7xq9t8nu5.g1-fbu13uab.can98.bnc.salesforce.com to me

Thu, Nov 27, 4:00 PM (8 hours ago) ...

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam ...

Congratulations! You are now a Bronze member and you are eligible for our Loyalty Rewards Program.  
Enjoy exclusive discounts, early access to offers, and special member benefits.  
Thank you for your continued Support.

... ... ...

... ... ...

Fig: Loyalty Program Email

Your Order has been Confirmed! Spam x

Lawrence Shane Joshua Lim via f0b5gu6uru3m.g1-fbu13uab.can98.bnc.salesforce.com to me

Wed, Nov 26, 10:25 PM (2 days ago) ...

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam ...

Dear ,  
Your order #O-0002 has been confirmed!  
Thank you for shopping with us.  
Best Regards,  
Sales Team

... ... ...

... ... ...

Fig: Order Confirmation Email



The screenshot shows an email from Lawrence Shane Joshua Lim (via g11fakj337.g1-fbu13uab.can98.bnc.salesforce.com) to me at 12:50 AM (0 minutes ago). The subject is "Low Stock Alert!". The message body contains a note about low stock for a T-shirt product, with a quantity of 4. It includes a "Report not spam" button and ends with "Best Regards, Inventory Monitoring System". Below the message are standard email interaction buttons for Reply, Forward, and Delete.

Fig: Low Stock Email

## Conclusion

The goal of the HandsMen Threads Salesforce project is to centralize all business data and integrate automation into key processes in order to provide the groundwork for future expansion.

A comprehensive, high-integrity data model that directly supports data-driven decision-making will be the outcome of this project's successful execution. Concurrently, the implementation of procedures such as Order Confirmation Emails, Loyalty Program, and Proactive Stock Alerts will maximize operational efficiency (particularly inventory management and order fulfillment) and greatly improve consumer involvement.

Essentially, this project provides HandsMen Threads with the technological architecture required to guarantee data correctness, promote better customer connections, and accelerate corporate operations.

## Future Enhancements

- Mobile App for Sales and Inventory Teams:** Give the Sales and Inventory teams mobile access to important data by using the Salesforce Mobile App. For instance, inventory employees may use the mobile app to update the Inventory\_\_c object while doing stock counts on the warehouse floor, while salespeople could check product availability and place orders while driving.
- Inventory Forecasting:** Incorporate predictive inventory forecasting into the current Apex stock monitoring process. This would increase operational efficiency beyond basic low-stock alerts by projecting future demand using order history data (HandsMen Order\_\_c) and product details (HandsMen Product\_\_c). This would enable proactive purchasing and production decisions.
- E-commerce Integration:** To allow real-time synchronization of product data (HandsMen Product\_\_c), inventory levels (Inventory\_\_c), and customer orders (HandsMen Order\_\_c), integrate the Salesforce solution with an e-commerce platform. This would simplify order capture, do away with human data entry, and provide clients the most recent stock availability.
- Case Management for Defective Products and Returns:** Create a structured Case Management process, specifically for handling returns or product quality issues. This would utilize the existing HandsMen\_Order\_\_c and HandsMen\_Product\_\_c objects to log and track the resolution of defective or returned items.



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- **Supplier Management:** Create a new custom object, to manage relationships with multiple suppliers and manufactures. This will allow for tracking of raw material costs, delivery schedules, and quality assurance records, integrating the supply chain directly into the Salesforce environment.