**FOR CAPSTONE PROJECT**

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**SALESFORCE**

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**Su Gi** = sugischoi@gmail.com.dev

**Data Management - Objects**

The following are the Custom objects which we need to create

1. HandsMen Customer

2. HandsMen Order

3. HandsMen Product

4. Inventory

5. Marketing Campaign

**Data Management - Fields**

**Formulas to do**:

**HandsMen Customer**

**Required fields** = FirstName, LastName

Full\_Name\_\_c = text = FirstName & " " & LastName

**Inventory**

**Required fields** = Stock\_Quantity\_\_c

Stock\_Status\_\_c = text = IF(Stock\_Quantity\_\_c > 10, "Available", "Low Stock")

**Other fields to create**

**HandsMen Customer**

- Email (Email)

- Phone (Phone)

- Total\_Purchases\_\_c (Number)

**HandsMen Product**

- SKU ( Text ) (Stock Keeping Unit)

- Price (Currency)

- Stock\_Quantity\_\_c (Number)

**HandsMen Order**

- Status (Picklist: Pending, Confirmed, Rejection)

- Quantity\_\_c (Number)

- Total\_Amount\_\_c(Number)

**Inventory**

- Warehouse (Text)

- Stock\_Quantity\_\_c (Number)

**Marketing Campaign**

- Start\_Date (Date)

- End\_Date (Date)

**Data Security - Users**

**Niklaus** = niklausnmika@gmail.com.dev - Sales

**Kol** = kolkmika@gmail.com.dev - Inventory

**Su Gi** = sugischoi@gmail.com.dev – Marketing

**FLOWS**

**Order Confirmation Flow - Record Triggered** - When HandsMen\_Order\_\_c.Status\_\_c = Confirmed

**Stock Alert Flow - Record Triggered** - When Inventory\_\_c.Stock\_Quantity\_\_c < 5

**Loyalty Status Flow - Scheduled Flow** = Runs daily to update Loyalty\_Status\_\_c

**Automation using Apex**

**Update Order Total** - Auto-update Total\_Amount\_\_c on order save

**Stock Deduction** - Reduce stock when an order is placed

**Loyalty Status Update** - Upgrade loyalty status based on purchases

**Batch Jobs**

**Loyalty points Calculations** - Every Sunday 12 AM, Updates customer points weekly

**Inventory Sync** - Daily at 2 AM, Syncs stock levels with external warehouse system

**CUSTOMER ACCOUNTS**

Customer One, Lloyd Defeo

[samplevisitorcap@gmail.com](mailto:samplevisitorcap@gmail.com)

**Demo Presentation Step by step**

1. **Introduction Yourself**
2. **Introduce the Project**
3. **Project Details**
   1. Discuss the User Scenario
      1. Automated Order Confirmations
      2. Dynamic Loyalty Program
      3. Proactive Stock Alerts
      4. Scheduled Bulk Order Updates
   2. Mention the What you’ll learn
      1. Data Modelling
      2. Data Quality
      3. Lightning App Builder
      4. Record Triggered Flows
      5. Apex and Apex Triggers
      6. Asynchronous Apex
4. **Database**
   1. Data Management – Objects
      1. HandsMen Customer
      2. HandsMen Product
      3. HandsMen Order
      4. Inventory
      5. Marketing Campaign
   2. Display the Tabs
   3. Display the Profiles
   4. Display the Roles
      1. Sales, Inventory, Marketing under CEO
   5. Display the Users
   6. Display the Permission Set that they can CRUD
      1. HandsMen Customer
      2. HandsMen Object
   7. Display the Email Template
5. **UI**
   1. Logging In
   2. Navigate to App Launcher and Launch the App
   3. Creating a Customer
      1. First Name
      2. Last Name
      3. HandsMen Customer Name – Required (Automatically filled up)
      4. Email (Validation Rule = should contain @gmail.com)
      5. Save
      6. Automatically fill up Full\_name\_c formula (FirstName & " " & LastName)
   4. Display the Product Form
      1. Create a 2 New Product
   5. Display Inventory
      1. Create a New Inventory
         1. Input 0 – To show the validation rule (Stock\_Quantity\_\_c < = 0)
         2. Input 11 – To Show Available Formula (IF(Stock\_Quantity\_\_c > 10, "Available", "Low Stock"))
      2. Create a New Inventory
         1. Input 6 – To Show Low Stock Formula (IF(Stock\_Quantity\_\_c > 10, "Available", "Low Stock"))
   6. Display the Order
      1. Order but 0 amount to show Validation Rule (Total\_Amount\_\_c <= 0)
6. **Database**
   1. Discuss the Order Confirmation Email (Record-Trigger Flow)
      1. Discuss the App will send an email if the status of the order is confirmed
   2. Display the OrderTriggerHandler and OrderTrigger
      1. If the Status is Changed into Confirmed but the Quantity is null or less than or equal to 500 it displays an Error that 'For Status "Confirmed", Quantity must be more than 500.'
      2. If the Status is Pending but the Quantity is null or less than or equal to 200 it displays an Error that 'For Status "Pending", Quantity must be more than 200.'
      3. If the Status is Rejection but the Quantity is null or less than or equal to 200 it displays an Error that 'For Status "Rejection", Quantity must be 0.'
7. **UI**
   1. Change the Quantity into 199 but the status is Pending, it shows Pending Error
   2. Change the Status into Rejection, but the Quantity is 199 it shows Rejection Error
   3. Change the Quantity into 199 but the status is Confirmed, it shows Confirmed Error
   4. Change the Quantity into 501 and change the Status into Confirmed
   5. Navigate to the email of the Customer to display the Order Confirmation Email
8. **Database**
   1. Discuss the Loyalty Status Update Flow (Scheduled-Trigger Flow)
      1. The loyalty status of the customer will update Daily every 10:00 AM
      2. Getting the Records from the HandsMen Customer
      3. It uses Loop to trigger daily
      4. With the Decision Element
         1. If the total Purchase is Greater than 1000
            1. It changes the Loyalty Status to Gold
         2. If the total purchase is less than 500
            1. It changes the Loyalty Status to Bronze
         3. If the total purchase is greater than 500 and less than 100 (Or the default outcome if the other Outcome is not meet)
            1. It changes the Loyalty Status to Silver
      5. Yesterday, I created a new customer account and added their custom Loyalty Status, for Raine 506, for Bae Jin, 499, and 1005 for Jessi
      6. Display the Apex Job (Completed and update the Loyalty Status of the customers.)
9. **UI**
   1. Display the Loyalty Status of Every Customer Loyalty Status
10. **Database**
    1. Discuss the Stock Alert Flow (Scheduled Flow)
       1. If the Stock Quantity is Less Than 5 it sends an email to the User with Inventory Role
11. **UI**
    1. Change the Stock Quantity into 4
    2. Navigate to the Email of the Inventory Manager
12. **Database**
    1. For the Batch Jobs
       1. Display the Batch Job
13. **Closing**