

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

Abstract

This project focuses on designing and implementing an HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion using Salesforce as the primary platform. The system enables users to capture customer information, place product orders, validate data inputs, and automate email notifications such as order confirmations.

Using Salesforce features such as Objects, Flows, Validation Rules, and Email Alerts, the solution streamlines the ordering process, reduces manual errors, and improves communication between the business and its customers. The project demonstrates how low-code tools in Salesforce can be used to build a real-world, production-ready business process with minimal custom code.

Objectives

- To design a centralized system to manage customer orders using Salesforce.
- To implement automated record creation for Orders and Order Items.
- To enforce data accuracy and completeness using Validation Rules.
- To set up automated email alerts for internal users (Sales Team) and external customers.
- To create a user-friendly interface (via Flow or standard pages) to capture customer and order details.
- To simulate a real business scenario where online orders are processed end-to-end.

Technology Description

Platform

Salesforce (CRM Platform) – Used to create objects, automation, and user interface.

Key Salesforce Components

Custom Objects: Order_c and Order_Item_c to store order and product details.

Flows: Screen Flow for capturing customer and order details and creating records automatically.

Validation Rules: Ensure correct data is entered (valid email, positive quantity, required fields).

Email Alerts: Notify sales team about new orders and send order confirmation emails to customers.

Email Templates: Predefined templates for structured and professional email messages.

User Interface: Salesforce Standard Pages or Flow Screens accessible by internal users.

Detailed Execution of Project Phases

Phase 1: Requirement Gathering

- Understand the business need:
 - Capture customer details.
 - Place product orders.
 - Notify sales team and customer.

- Identify required fields for customers and orders such as Customer Name, Email, Phone, Address, Product, Quantity, Delivery Option, and Status.

Phase 2: Salesforce Object Design

1. Create the necessary custom objects and fields in Salesforce.

- Custom Object: Order_c
- Customer_Name_c (Text)
- Email_c (Email)
- Phone_c (Phone)
- Shipping_Address_c (Text Area)
- Delivery_Option_c (Picklist: Standard, Express)
- Status_c (Picklist: New, Processing, Shipped, Cancelled)
- Total_Amount_c (Currency)

2. Custom Object: Order_Item_c

- Order_c (Lookup to Order_c)
- Product_c (Text or Lookup to Product2)
- Quantity_c (Number)
- Price_c (Currency)
- Subtotal_c (Formula: Quantity * Price)

Phase 3: Implement Validation Rules

Implement validation rules on Order_c and Order_Item_c to ensure data quality.

Example Validation Rule on Order_c – Email Format:

```
NOT(  
    REGEX(  
        Email_c,  
        "^([A-Za-z0-9._%+-]+@[A-Za-z0-9.-]+\.[A-Za-z]{2,4}$")  
    )  
)
```

Error Message: Please enter a valid email address (example: name@example.com).

Example Validation Rule on Order_Item_c – Quantity Must Be Positive:

Quantity_c <= 0

Error Message: Quantity must be greater than zero.

Phase 4: Build the Flow

Flow Type: Screen Flow – Customer Order Creation Flow

- Screen 1 – Customer Information: Inputs Customer Name, Email, Phone, Shipping Address.
- Screen 2 – Order Details: Inputs Product, Quantity, Delivery Option.
- Decision Element – Validate Quantity: Checks if Quantity <= 0.
- Create Records – Order_c: Creates a new Order with entered details.
- Create Records – Order_Item_c: Creates related Order Item linked to the Order.

- Action – Invoke Email Alerts: Sends email to sales team and customer.
- Screen 3 – Confirmation Screen: Displays order creation success message.
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Phase 5: Configure Email Alerts & Templates

- Create email templates for internal order notification and customer order confirmation.
- Configure email alerts linked to Order_c using these templates and specify recipients such as Sales Team and the customer's email field (Email_c).

Phase 6: Testing

Test the system using various scenarios, including valid and invalid data entries, ensuring that:

- Validation rules trigger correctly.
- Flows create records accurately.
- Email alerts are sent to the correct recipients.
- The end-to-end order process functions as expected.

Project Explanation with Real-World Example

Imagine T-shirt Cloth, an e-commerce business that sells Cloth. Their agents receive orders from customers who call, chat, or walk in.

A customer named Aldrian Loberiano calls to order 200 cloths. The sales agent opens the Customer Order Creation Flow in Salesforce and enters:

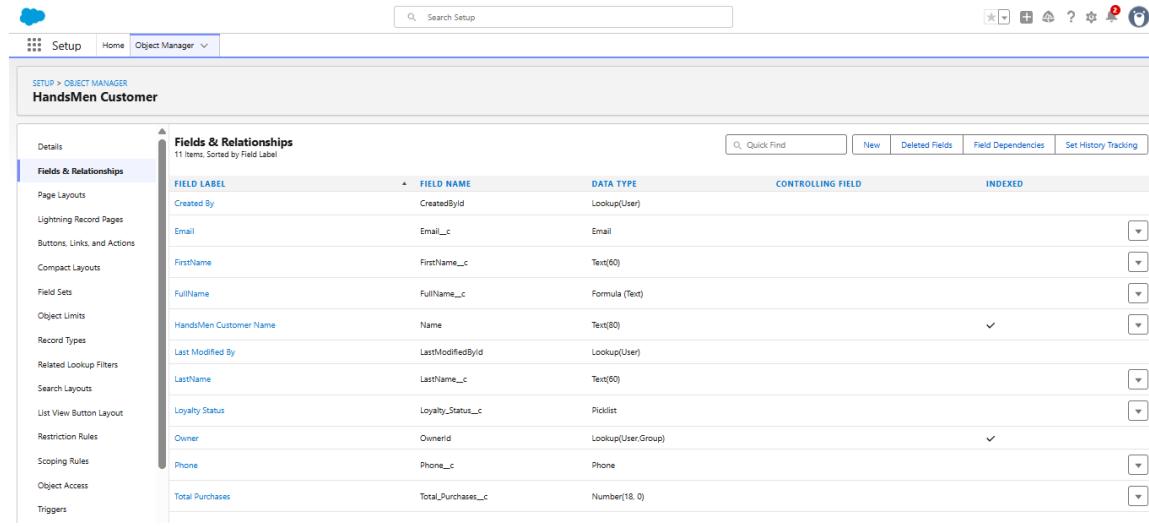
- Name: Aldrian Loberiano
- Email: aldriancayoloberiano@gmail.com

- Address: Laguna, Philippines
- Product: Clothing
- Quantity: 200
- Delivery: Express

If the agent mistypes the email, a Validation Rule prevents saving. When all data is correct, the Flow creates an Order_c record and a related Order_Item_c record. Salesforce automatically sends an internal email to the Sales Team and an order confirmation email to Aldrian. The Sales Team processes the order and updates the Status from New to Processing and then Shipped.

Screenshots

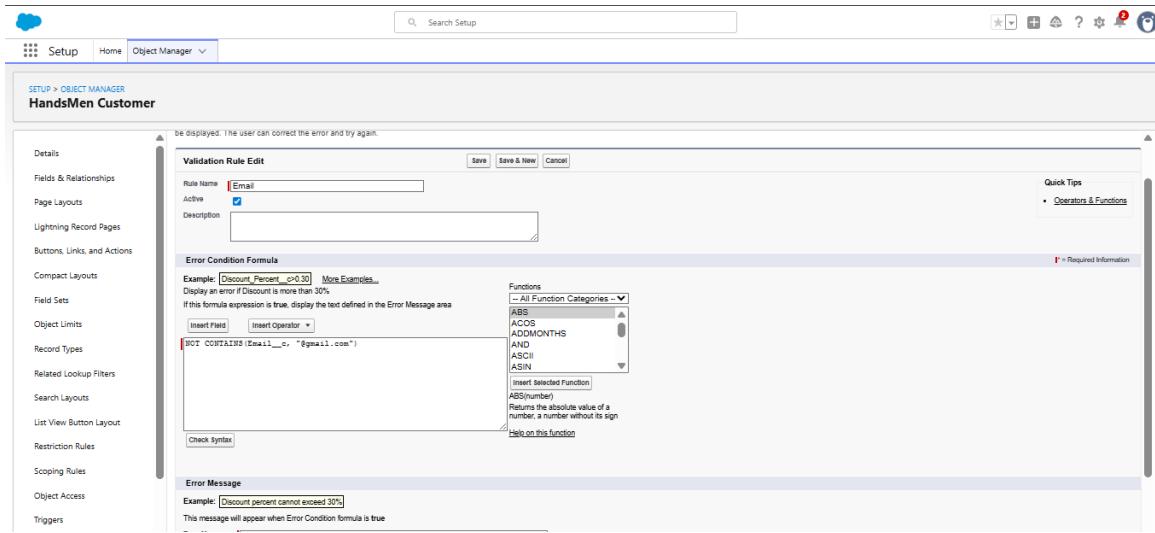
Screenshot 1 – Custom Object Setup (Order_c): Shows key fields like Customer Name, Email, Status, Delivery Option.



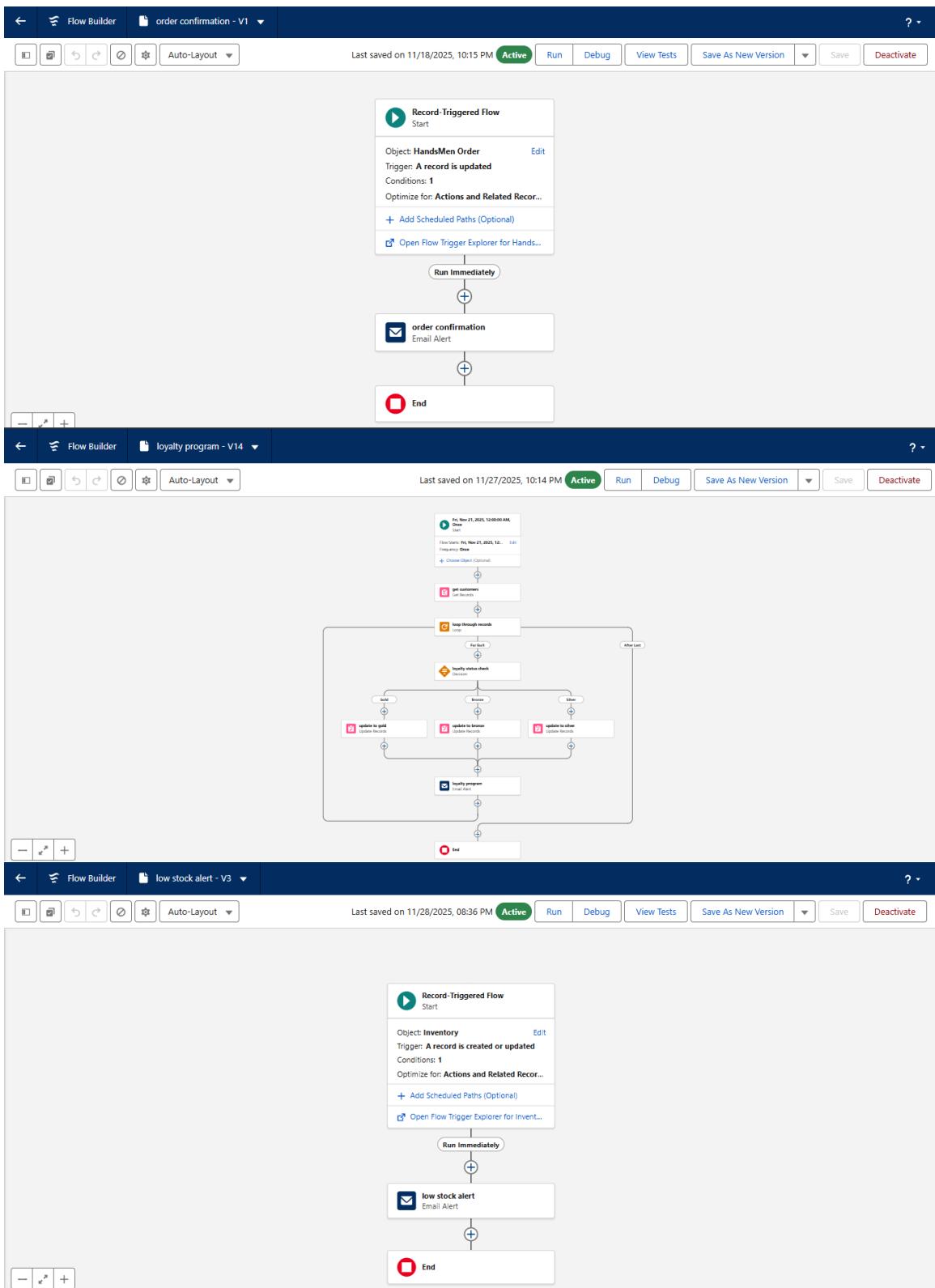
The screenshot shows the Salesforce Object Manager interface for the 'HandsMen Customer' custom object. The left sidebar contains navigation links for Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area displays the 'Fields & Relationships' section, which lists 11 items sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Key fields shown include 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 (LastModifiedBy, Lookup(User)), LastName (LastName__c, Text(60)), Loyalty Status (Loyalty_Status__c, Picklist), Owner (OwnerId, Lookup(User/Group)), Phone (Phone__c, Phone), and Total Purchases (Total_Purchases__c, Number(18, 0)).

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	LastModifiedBy	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)		

Screenshot 2 – Validation Rule Setup: Displays formula and error message configuration for email validation.



Screenshot 3 – Flow in Flow Builder: Shows the canvas with screens, decisions, and create record elements.



Screenshot 4 – Sample Error on Form: Shows red error message when invalid email or quantity is entered.

The screenshot shows a Salesforce application window titled "New HandsMen Customer". The form is titled "Information" and includes fields for "HandsMen Customer Name", "Email", "Phone", "Loyalty Status", "FirstName", and "LastName". The "HandsMen Customer Name" field is highlighted with a red border and contains the value "0", with an error message "Complete this field." displayed above it. The "Owner" field shows "Aldrian Loberiano". At the bottom right of the form are buttons for "Cancel", "Save & New", and "Save".

Screenshot 5 – Sample Order Record Detail Page: Displays the created order record and related order items.

HandsMen Threads

Inventorys Recently Viewed

1 item • Updated a few seconds ago

Inventory Number: I-0001

Information

Inventory Number

* HandsMen Product: Search HandsMen Products...

Stock Quantity:

Warehouse:

New Import Change Owner Assign Label

Cancel Save & New Save

New Inventory

HandsMen Threads

HandsMen Customers HandsMen Orders HandsMen Products **Inventorys** Marketing Campaigns Reports More

HandsMen Products

Recently Viewed

1 item • Updated a few seconds ago

HandsMen Product Name: T-shirt cloth

Search this list...

New Import Change Owner Assign Label

Search this list...

The image consists of two vertically stacked screenshots of a software application interface, likely a CRM or customer management system.

Screenshot 1 (Top): New HandsMen Customer Form

This screenshot shows a modal dialog titled "New HandsMen Customer". The form contains the following fields:

- Information** section:
 - * HandsMen Customer Name: A required field with a placeholder "Ø" highlighted in pink, accompanied by the error message "Complete this field."
 - Email: An empty input field.
 - Phone: An empty input field.
 - Loyalty Status: A dropdown menu showing "--None--".
 - FirstName: An empty input field.
- Buttons at the bottom: "Cancel", "Save & New", and "Save".

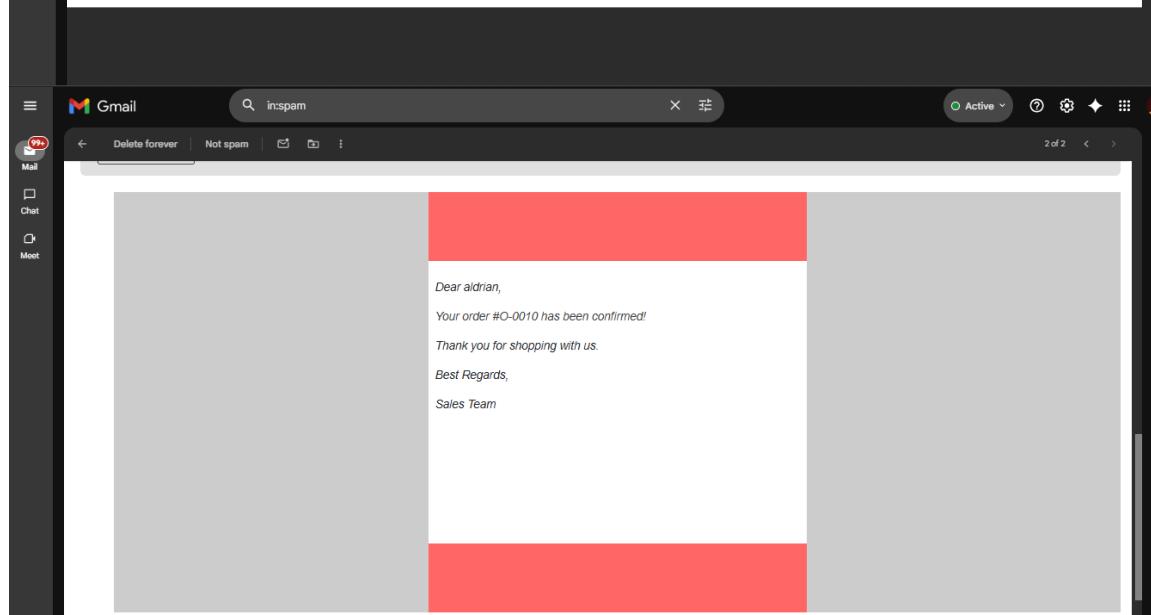
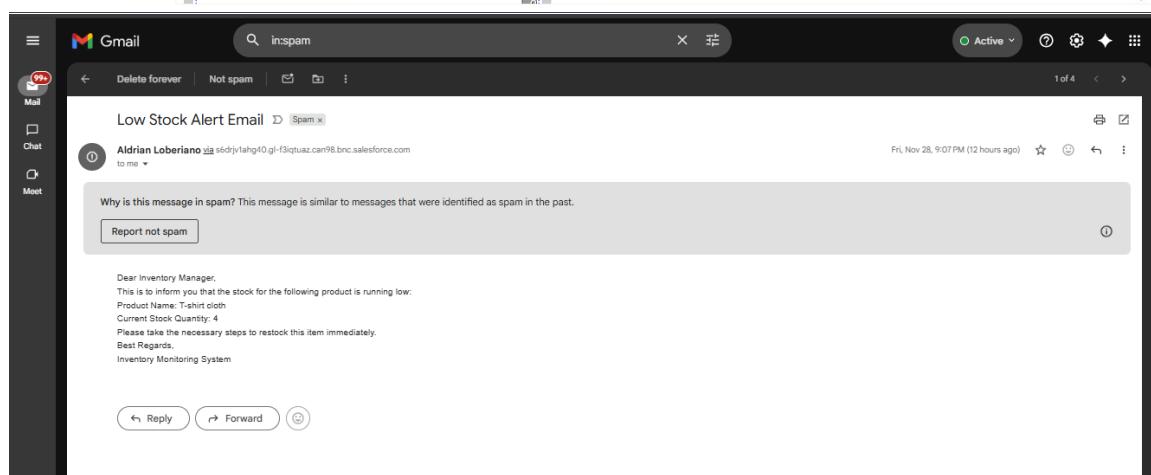
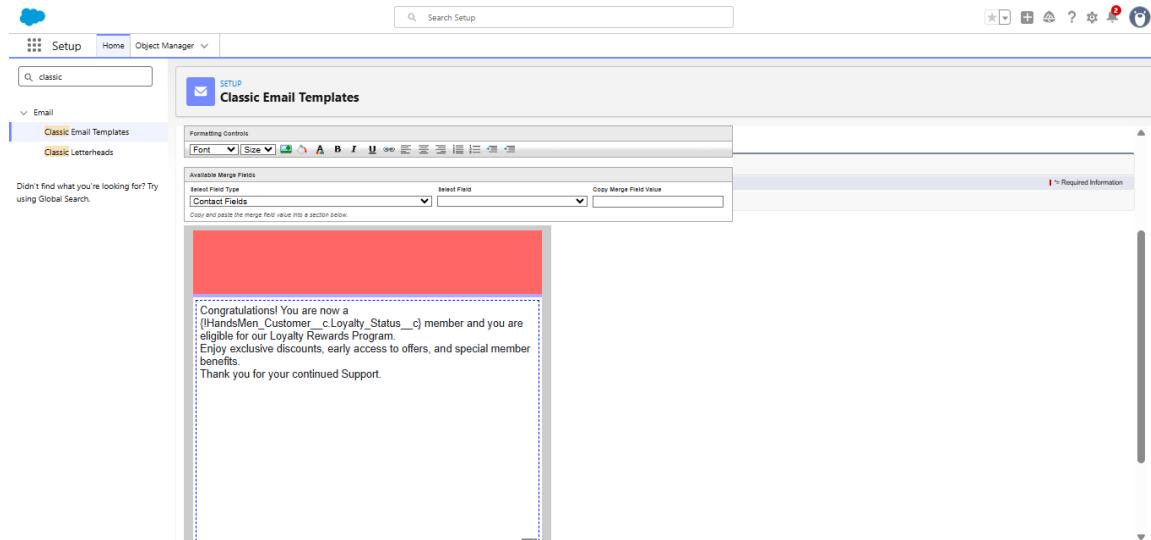
Screenshot 2 (Bottom): HandsMen Customers List View

This screenshot shows a list view for "HandsMen Customers". The header includes navigation links like "HandsMen Threads", "HandsMen Customers", "HandsMen Orders", "HandsMen Products", "Inventory", "Marketing Campaigns", "Reports", and "More". The main area displays a table with the following data:

	HandsMen Customer Name	Action
1	<input type="checkbox"/> aldrian	
2	<input type="checkbox"/> john	

Additional buttons are visible at the top right of the list view, including "New", "Import", "Change Owner", and "Assign Label".

Screenshot 6 – Email Alert Configuration: Shows recipients and selected email template.



Screenshot 7 – Sample Confirmation Email in Inbox: Shows email received by the customer (with private information hidden).

(I don't receive Loyalty Points email Template; I followed carefully the instruction but nothing receive in my spam)

Congratulations! You are now a {!HandsMen_Customer_c.Loyalty_Status_c} 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.

Just like in above.

Conclusion

This project demonstrates how Salesforce can be used to build a practical, end-to-end business process using mostly configuration and low-code tools. Through the combination of Objects, Flows, Validation Rules, and Email Alerts, the system is able to capture accurate customer and order data, reduce manual workload through automation, improve communication via automatic notification emails, and provide a structured process for handling orders. The solution is scalable and maintainable, and it can be extended to include more complex logic such as discount handling, inventory checks, or payment integration.

Future Scope

Integration with payment gateways to automatically verify payments and update order status to “Paid”.

Inventory management integration to prevent orders when stock is low or zero.

Customer Portal (Experience Cloud) for customers to place orders and track status online.

Reports and Dashboards to provide real-time visibility into orders, revenue, and top-selling products.

SMS notifications alongside emails for order confirmation and shipping updates.

Advanced automation using Flows or Apex to handle complex business rules and approval processes.