

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:

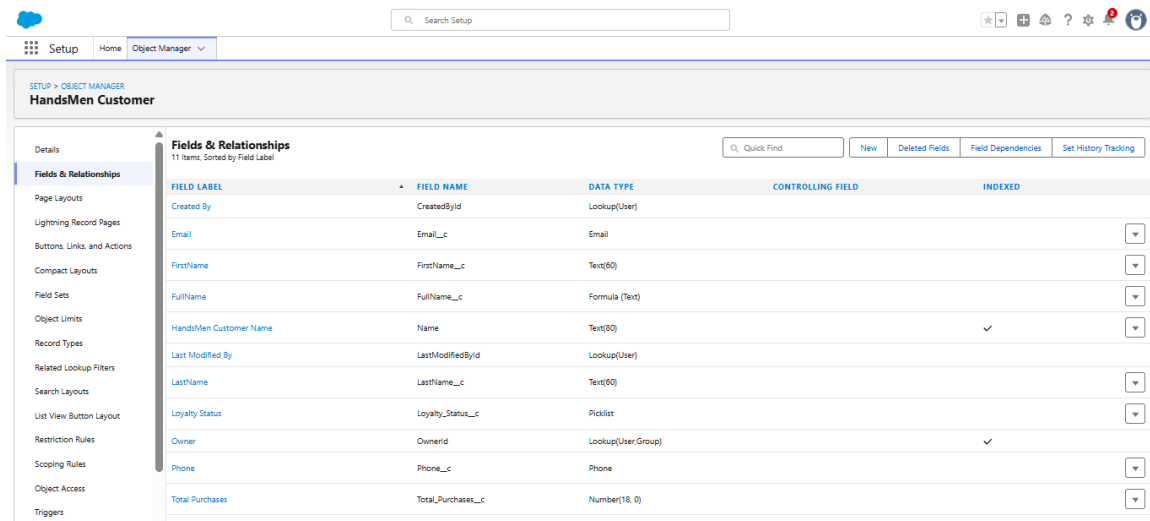
- Name: Aldrian Loberiano
- Email: aldriancayoloberiano@gmail.com

- 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.

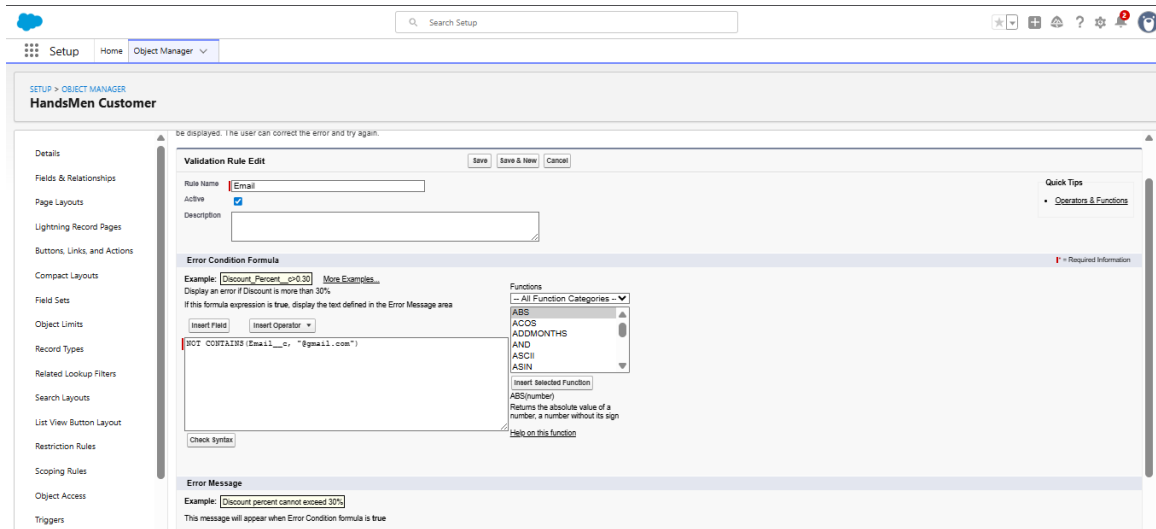
Screenshots

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

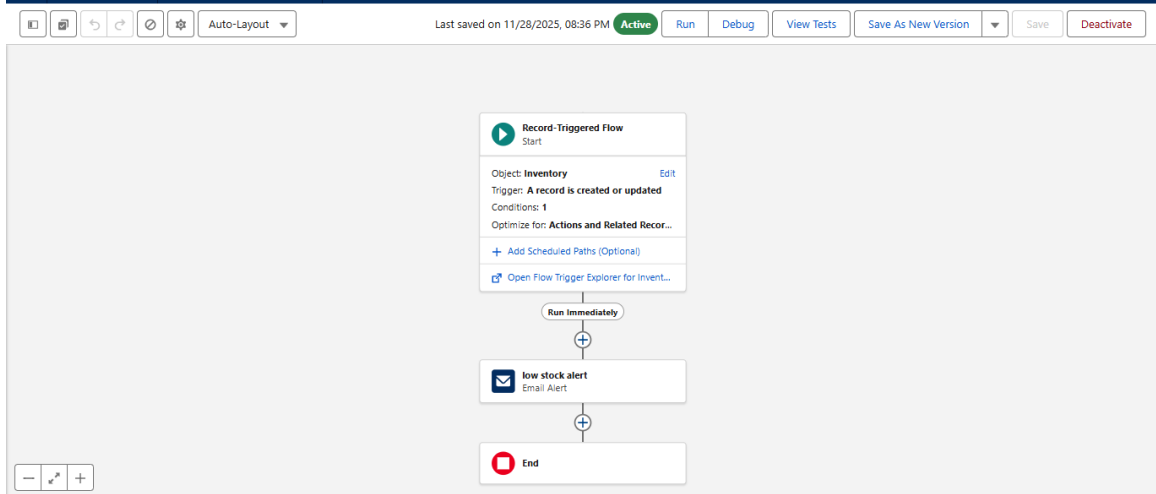
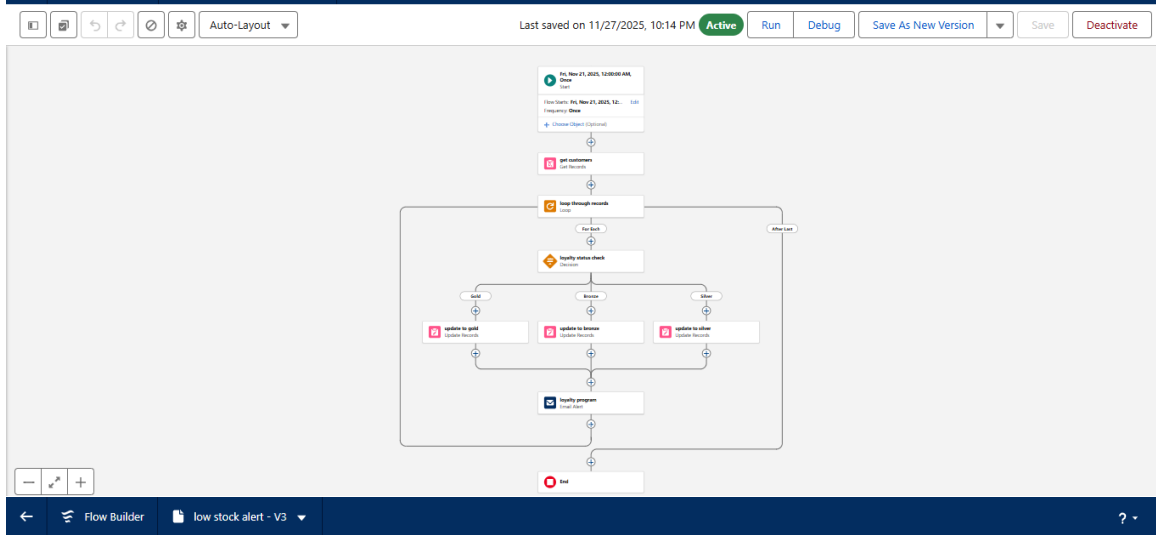
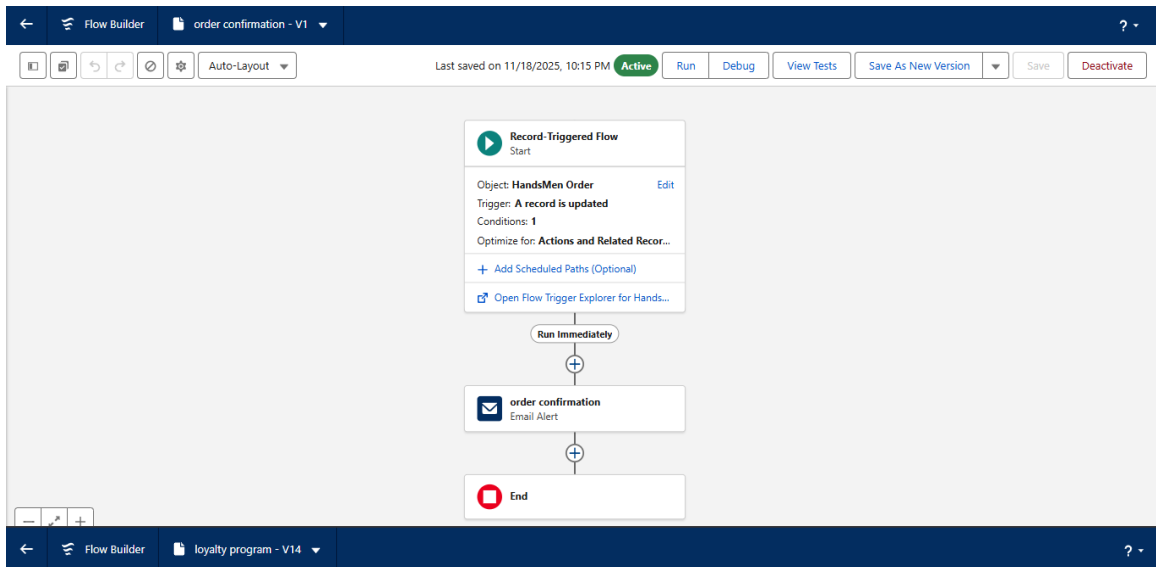


FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
FirstName	FirstName__c	Text(80)		
FullName	FullName__c	Formula (Text)		
HandsMen Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
LastName	LastName__c	Text(80)		
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 web application interface for managing HandsMen customers. A modal window titled "New HandsMen Customer" is open, displaying a form with the following fields:

- HandsMen Customer Name:** A text input field with a red error message "Complete this field." and a red border.
- Email:** A text input field.
- Phone:** A text input field.
- Loyalty Status:** A dropdown menu with "--None--" selected.
- FirstName:** A text input field.
- LastName:** A text input field.

The form also includes a "Owner" section with a profile icon and the name "Aldrian Loberiano". At the bottom right of the form are three buttons: "Cancel", "Save & New", and "Save". The background shows a sidebar with "HandsMen Threads" and "HandsMen Customers" sections, and a main area with "Recently Viewed" customers.

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

HandsMen Threads

Search...

Inventory

Recently Viewed

1 item • Updated a few seconds ago

Inventory Number

1

I-0001

New Inventory

* = Required information

Information

Inventory Number

* HandsMen Product

Search HandsMen Products...

Stock Quantity

Warehouse

Cancel

Save & New

Save

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

More

HandsMen Products

Recently Viewed

1 item • Updated a few seconds ago

Search this list...

New

Import

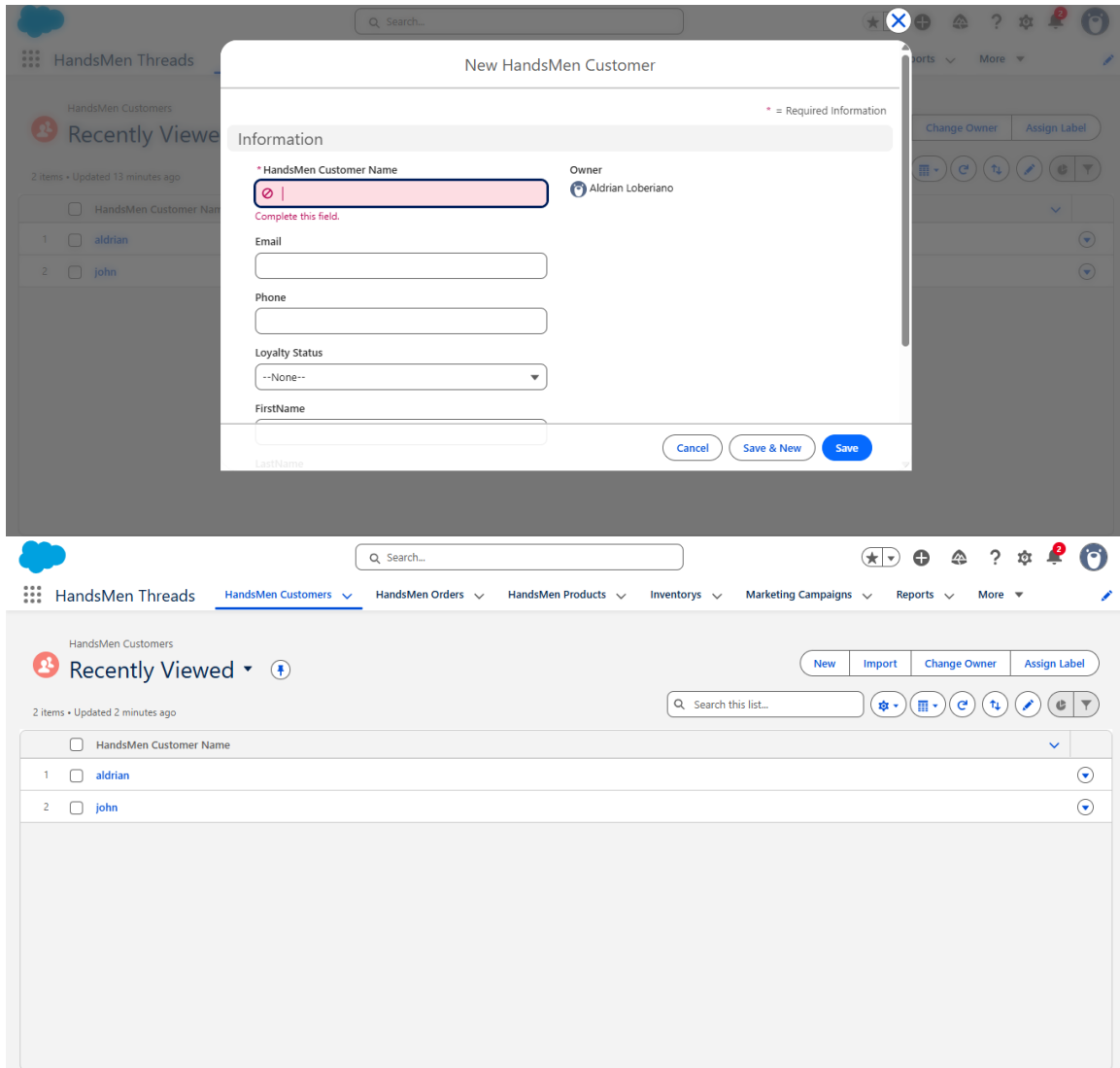
Change Owner

Assign Label

HandsMen Product Name

1

T-shirt cloth



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

Setup

Home

Object Manager

Q, classic

Classic Email Templates

Classic Letterheads

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

Classic Email Templates

Formatting Controls

Font Size B I U

Available Merge Fields

Selected Field Type

Contact Fields

Selected Field

Copy Merge Field Value

Copy and paste the merge field value into a section below.

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.

Gmail

in:spam

Active

Delete forever

Not spam

1 of 4

Low Stock Alert Email

Spam

Aldrian Loberiano

aldrian.lob@handsmen.com

Fri, Nov 28, 9:07 PM (12 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

Dear Inventory Manager,

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

Product Name: T-shirt cloth

Current Stock Quantity: 4

Please take the necessary steps to restock this item immediately.

Best Regards,

Inventory Monitoring System

Reply

Forward

Gmail

in:spam

Active

Delete forever

Not spam

2 of 2

Dear aldrian,

Your order #O-0010 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

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.