

HANDSMEN THREADS

ELEVATING THE ART OF SOPHISTICATION IN MEN'S FASHION

ABSTRACT:

This project introduces a Salesforce solution for HandsMen Threads, a fashion brand aiming to improve data management and strengthen customer relationships. The system is built on a robust data model that captures key business details like customer information, orders, inventory, and financial records. By keeping all data connected and accessible, the CRM ensures smooth collaboration across departments and creates a single, reliable source of truth for the organization.

To maintain accuracy, validation is built directly into the user interface, meaning every piece of data entered or updated is checked before saving. This helps avoid mistakes, ensures consistency, and gives management confidence in the information they use for decision-making. Alongside this, the project introduces process automations that save time, reduce manual effort, and keep daily operations running smoothly without constant human intervention.

Customers will directly benefit from automatic order confirmation emails, which provide instant updates after purchases, building trust and engagement. A dynamic loyalty program will also track purchase history and update loyalty status automatically, offering personalized rewards that encourage repeat business. For the warehouse team, proactive stock alerts will notify them whenever inventory falls below five units, making it easier to restock in time and prevent product shortages that could affect sales.

In addition, the system includes a scheduled bulk order update that runs every night at midnight. This process automatically updates financial records, adjusts inventory, and ensures the data is ready for the next business day. Together, these features make the Salesforce setup a powerful tool that improves customer satisfaction, boosts staff productivity, and supports smooth, reliable business operations positioning HandsMen Threads for growth in a competitive fashion market.

OBJECTIVES:

The Salesforce project for HandsMen Threads is designed to transform the way the brand manages its operations, data, and customer interactions. By integrating automation, validation, and a strong data model, the system aims to streamline processes, improve efficiency, and deliver a superior customer experience. To achieve these outcomes, the project is guided by the following key objectives:

1. Build a Centralized Data Model:

Develop a robust structure to store and manage customer, order, product, inventory, and financial data in a single, unified system.

2. Ensure Data Accuracy and Integrity:

Implement validation rules and role-based access to maintain consistent, reliable, and secure information.

3. Automate Key Business Processes:

Streamline workflows such as order confirmations, loyalty program updates, stock alerts, and bulk order processing to reduce manual effort and improve efficiency.

4. Enhance Customer Experience:

Strengthen customer relationships through timely communication, personalized loyalty programs, and transparent order updates.

5. Optimize Inventory Management:

Prevent stockouts or overselling by setting up proactive alerts and automated updates to track and manage stock levels effectively.

TECHNOLOGY DESCRIPTION:

Salesforce:

Salesforce is a cloud-based customer relationship management (CRM) platform that helps businesses manage and improve their relationships with customers. It provides tools for sales, service, marketing, commerce, and IT teams to connect with customers, manage data, and streamline operations. Essentially, it helps businesses understand and engage with their customers more effectively.

Custom Objects:

In Salesforce, custom objects are user-defined database tables used to store information specific to your organization, going beyond the standard objects provided by Salesforce.

Example:

1. Customer – Stores details like name, contact info, loyalty status, and purchase history.

2.Order – Tracks customer purchases, order status, payment, and delivery details.

3.Product – Holds product details such as style, size, color, price, and availability.

4.Inventory – Monitors stock levels, warehouse location, and restocking alerts.

Tabs:

Tabs are user interface elements that provide access to different objects, apps, and features within the platform. They act as shortcuts, allowing users to quickly navigate and interact with various parts of the system.

Example:

Customers – To view and manage all customer records.

Orders – To track and update customer purchases.

App Manager:

App Manager is a centralized tool for creating, managing, and customizing Salesforce apps, both for Lightning Experience and Classic.

Profiles:

Profile is a set of permissions that defines what a user can do in the system.

Example:

System Administrator – Full access to everything in Salesforce, including managing other users and customizing the system.

Standard User – Can create, read, edit, and delete records for most standard objects but cannot customize Salesforce.

Read Only User – Can only view records but cannot create or modify them.

Roles:

A Role in Salesforce defines a user's position in the role hierarchy, which mainly controls record-level access (who can see whose data).

Example:

CEO, Sales Manager, Sales Representative, Inventory Manager, Marketing Manager.

Permission sets:

A Permission Set is a collection of settings and permissions that grant specific users additional access to features and functions within Salesforce. They are used to extend user access without making changes to the existing setup.

Validation Rules:

A Validation Rule is a rule that ensures data entered into a record meets specific criteria before it can be saved. If the data doesn't meet the condition, Salesforce shows an error message and prevents the record from being saved until the error is corrected.

Example:

Phone Number Format - Ensure that a customer's phone number contains exactly 10 digits.

Email Validation - Require that the email field contains "@" and ".com".

Email Templates:

Salesforce email templates allow users to standardize and streamline email communication by providing pre-formatted email layouts with customizable content.

Email Alerts:

An email alert is an email generated by an automated process and sent to the designated recipients.

Example:

When a new order is created, an email is sent to the customer confirming their purchase.

Flows:

Salesforce Flows are a powerful automation tool within Salesforce that allows users to automate complex business processes without writing code, using a visual, point-and-click interface. They enable users to create automated workflows for various tasks, including data manipulation, guiding user interactions, and automating actions within Salesforce or external systems.

Types of flows:

Record-Triggered Flow: Runs automatically when a record is created, updated, or deleted.

Scheduled-Triggered Flow: Runs at a specified time and frequency (e.g., daily at midnight).

Screen Flow: Provides a user interface for guided data entry (like a step-by-step form or wizard).

Autolaunched Flow: Runs in the background without user interaction (often called from Apex, Processes, or other flows).

Example:**Order Confirmation Flow (Record-Triggered):**

When a new order is created, send a confirmation email to the customer automatically.

Apex:

Apex is a proprietary, strongly-typed, object-oriented programming language used to build custom business logic and functionality.

Example:**Order Confirmation Trigger:**

When a new order is inserted, an Apex trigger sends a confirmation email with order details.

DETAILED EXECUTION OF PROJECT PHASES:

1. DEVELOPER ORG SETUP:

Creating a developer org in salesforce.

- Go to <https://developer.salesforce.com/signup>
- Enter the details in the fields provided
 - 1.First name & Last name
 - 2.Email
 - 3.Role: Developer
 - 4.Company: College Name
 - 5.County: India
 - 6.Postal Code: pin code
 - 7.Username: should be a combination of your name and company

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Job title: Developer ✓ Work email: 22501a0572@pvpsit ✓

Company: Prasad V Potluri Siddi ✓ Country/Region: India ✓

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our Privacy Statement.

Click on sign me up after filling the details and create a password and gain access to the Salesforce set up page.

2. CUSTOM OBJECT CREATION:

The following are the Custom objects which are created:

1. HandsMen Customer
2. HandsMen Order
3. HandsMen Product
4. Inventory
5. Marketing Campaign

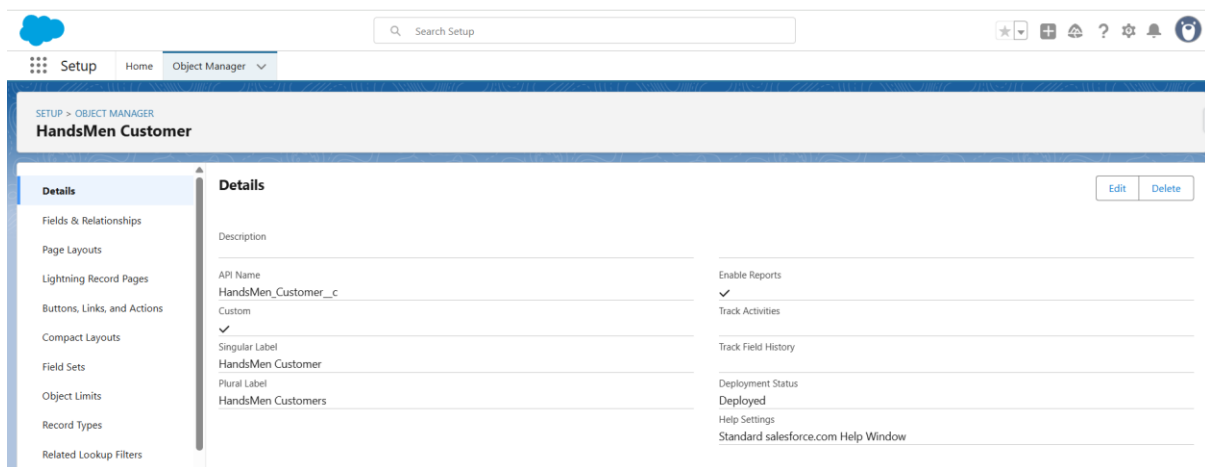
Steps to create Custom Object:

To Navigate to Setup page:

- Click on gear icon → click setup

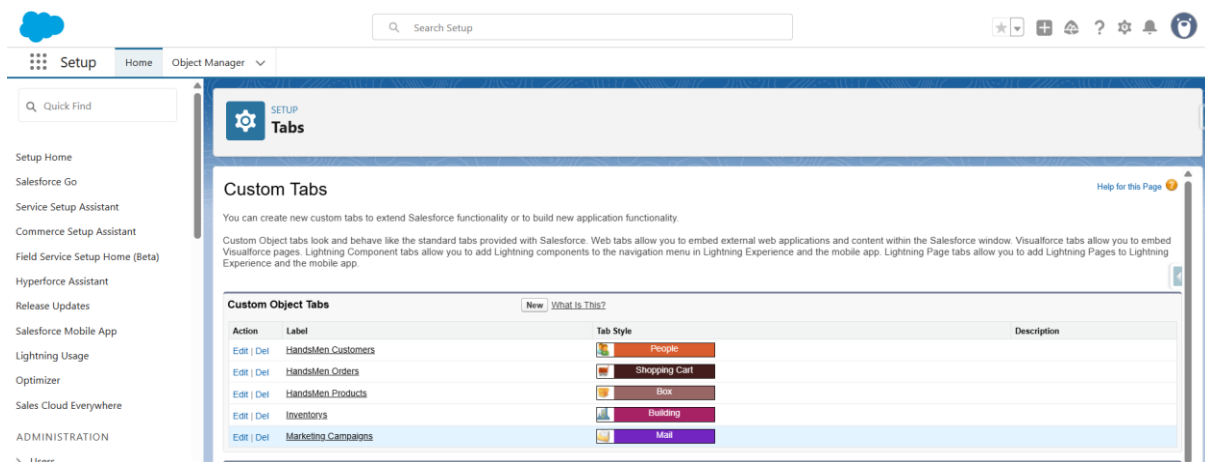
To create an object:

- From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
- Enter the label name, Plural label name, Enter Record Name Label and Format, Record Name, Data Type.
- Click on Allow reports,
- Allow search → Save.



3. CREATING TABS:

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New
2. Select Object → Select any tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.



4. CREATING LIGHTNING APP:

Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.

A new custom lighting app is created.

- **Added App Details:** Set HandsMen Threads as name, description added, defaults kept.
- **Navigation Items:** Added required items (Customer, Order, Inventory, Product, Reports, Dashboard, Account, Contact, Marketing Campaign).
- **User Profiles:** Added System Administrator and saved.

5. CREATING VALIDATION RULES:

1. Go to setup → click on Object Manager → type object name in quick find bar → click on the object.

2. Click on the validation rule → click New.

Validation rule for order object:

Prevents saving if “Total_Amount__c <= 0”.

Error: Please Enter Correct Amount.

Validation rule for Inventory object:

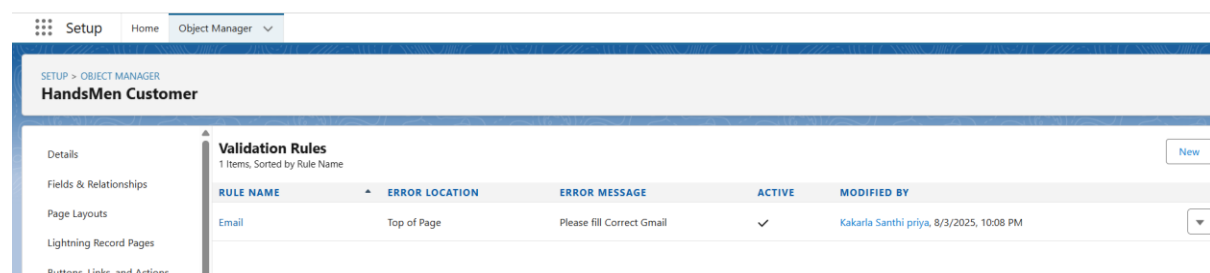
Prints an error message if “Stock_Quantity__c <= 0”

Error: the inventory count is never less than zero.

Validation rule for HandsMen Customer object:

Validates if entered email contains “@gmail.com” or not.

Error: Please fill Correct Gmail.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions. The main content area is titled 'HANDSMEN CUSTOMER' and displays a table of 'Validation Rules'. The table has columns for Rule Name, Error Location, Error Message, Active status, and Modified By. One rule is listed: 'Email' with an error location of 'Top of Page' and an error message of 'Please fill Correct Gmail'. The rule is active and was modified by 'Kakarla Santhi priya' on 8/3/2025 at 10:08 PM.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email	Top of Page	Please fill Correct Gmail	✓	Kakarla Santhi priya, 8/3/2025, 10:08 PM

HandsMen Customer
john

Related Details

* = Required Information

*HandsMen Customer Name
john

Owner
Kakarla Santhi priya

Email
22501a0572@pvpst.ac.in

Phone

Loyalty Status
Bronze

First Name
john

Last Name
m

Full Name

We hit a snag.
Review the errors on this page.
Please fill Correct Gmail

Cancel Save

6. USER PROFILES:

Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard user) → enter profile name (Platform 1) → Save.

7. USER ROLES:

Go to quick find → Search for Roles → click on set up roles

Created roles for different Departments

- Sales manager
- Inventory manager
- Marketing Team

8. USERS CREATION:

1. Go to setup → type users in quick find box → select users → click New user

2. Fill the fields and click on save.

Created users:

Nicklaus Mikaelson – Role assigned → Sales

Kol Mikaelson – Role assigned → Inventory

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: [All Users](#) [Edit](#) [Create New User](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

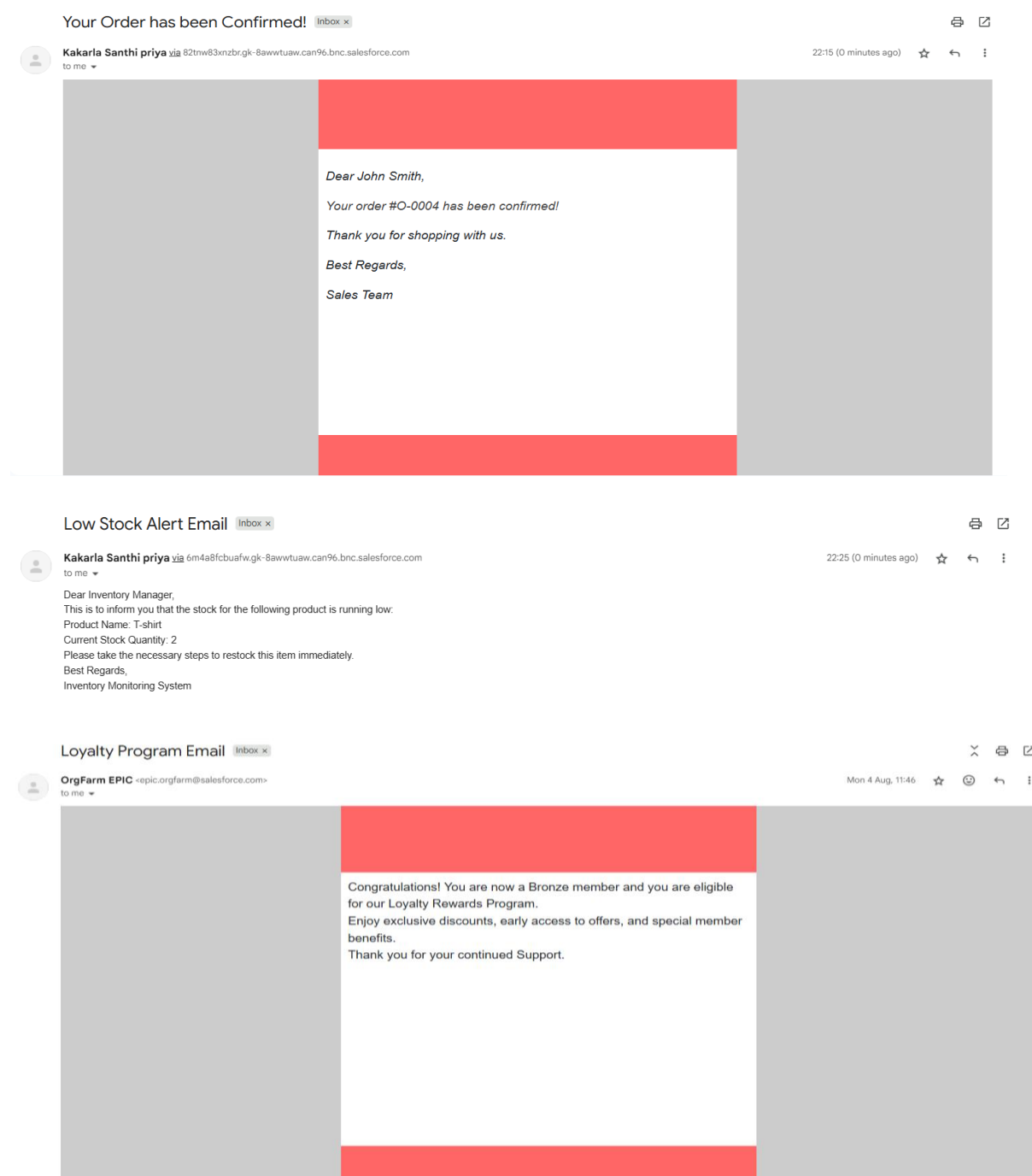
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgk00008awwtuaw.cmyjuxauizai@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIC	epic.c7ac0452a49b@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Mikaelson_Daniel	dmika	22501a0572456@pvpst.ac.in	Marketing	✓	Platform 1
<input type="checkbox"/> Edit	Mikaelson_Kol	kmika	22501a0572876@pvpst.ac.in	Inventory	✓	Platform 1
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	22501a0572890@pvpst.ac.in	Sales	✓	Platform 1
<input type="checkbox"/> Edit	Santhi priya_Kakarla	225	22501a0572613@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dgk00008awwtuaw.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dgk00008awwtuaw.com		✓	Analytics Cloud Security User

9. EMAIL TEMPLATES AND ALERTS:

Designed three email templates:

- **Order Confirmation** – Triggered when the order status was confirmed.
- **Low Stock Alert** – Triggered when inventory dropped below 5 units.
- **Loyalty Program Email** – Triggered when loyalty status changed.

Corresponding email alerts were configured using these templates and integrated into automation flows.

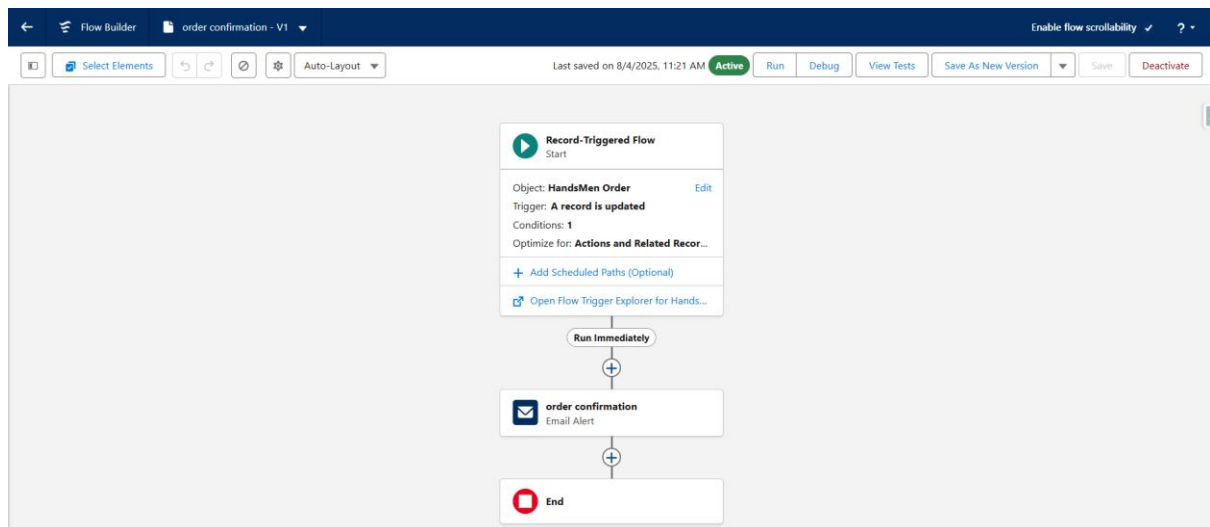


10. CREATING FLOWS:

Go to Setup → Flow.

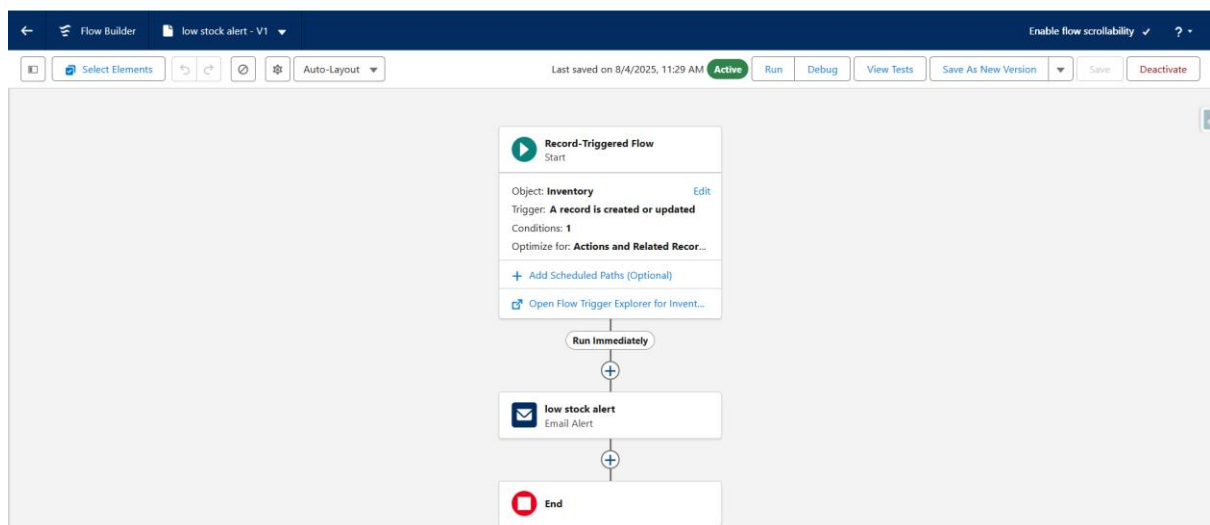
Order confirmation Email Flow:

- The flow was triggered when an Order__c record was updated with Status__c = "Confirmed".
- It executed only when the record update met the specified condition (status changed to Confirmed).
- Sends an Order Confirmation Email to the user.



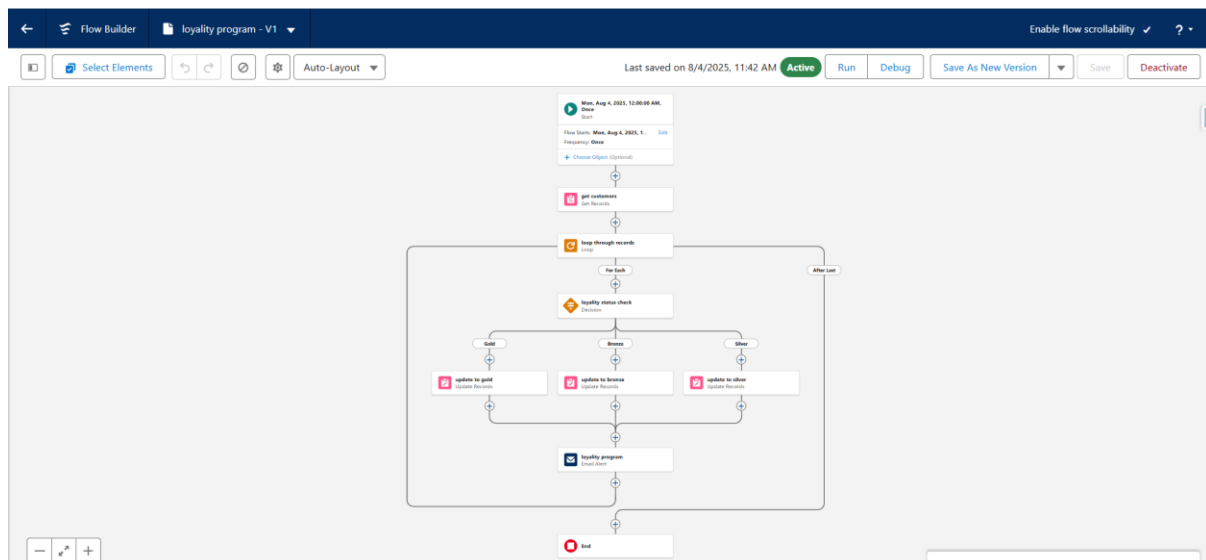
Stock Alert Email Flow:

- Whenever an Inventory__c record is created or updated, the flow checks if Stock_Quantity__c is less than 5.
- If the condition is true, the flow executes the configured action, which in this case is sending an Email Alert.



Loyalty Status Update:

- At the scheduled time every day, the flow retrieves all records from the HandsMen_Customer__c object using the Get Records element.
- The flow loops through each customer and checks their Total_Purchases__c value to determine the appropriate loyalty status:
 - Gold** if purchases > 1000
 - Silver** if purchases between 500 and 1000
 - Bronze** if purchases < 500
- The flow updates the Loyalty_Status__c field for each customer based on the decision outcome, ensuring loyalty tiers are always up to date automatically.



11. APEX TRIGGERS:

- **Update Order Total** - Automatically calculate and update Total_Amount__c whenever an order is created or updated.
- **Stock Deduction** - Reduce inventory stock when an order is confirmed.
- **Loyalty Status Update** - Upgrade loyalty status based on total purchases.

REAL WORLD EXAMPLES:

1. Centralized Data Model

- **Purpose:**
Stores all business data like customers, orders, products, inventory in a single Salesforce system.
- **Real-World Example:**
When a customer named John Smith places an order for a T-shirt, his information (contact, loyalty status), order details (product, quantity, price), and inventory (stock update) are all stored and updated in one place, ensuring no discrepancies between teams.

2. Data Accuracy and Validation

- **Purpose:**
Validation rules prevent wrong data from being saved.
- **Real-World Example:**
If a customer enters an wrong email then an error message will be shown “Require that the email field contains “@” and “.com”.

3. Automated Order Confirmation

- **Purpose:**
When an order is confirmed, the system sends an Order Confirmation Email automatically.
- **Real-World Example:**
After John Smith T-shirt order is confirmed, he instantly receives an email.

4. Inventory Stock Alerts

- **Purpose:**
Sends an email to the Inventory Manager when stock is below 5 units.
- **Real-World Example:**
The stock for the T-shirt drops to 3 units. Salesforce sends an alert: “Stock Alert: Only 4 units left for T-shirt. Please take the necessary steps to restock items.”

5. Loyalty Status Update:

- **Purpose:**
Automatically upgrades customers based on purchase history using a scheduled flow.

- **Real-World Example:**

John Smith total purchases reach ₹1,200. At midnight, the scheduled flow updates his Loyalty_Status__c to Gold, triggering a loyalty email.

6. Order Total Calculation (Trigger)

- **Purpose:**

Automatically calculates the Total_Amount__c as Quantity * Unit Price.

- **Real-World Example:**

John Smith orders 2 T-shirts at ₹3,000 each. When the order is saved, the system calculates:

Total_Amount__c = ₹6,000

No manual calculation needed, reducing human errors.

7. Stock Deduction After Order

- **Purpose:**

Deducts stock quantity after an order is confirmed.

- **Real-World Example:**

John Smith's order of 2 T-shirts reduces the inventory count from 10 units to 8 units automatically, ensuring accurate stock levels for the next order.

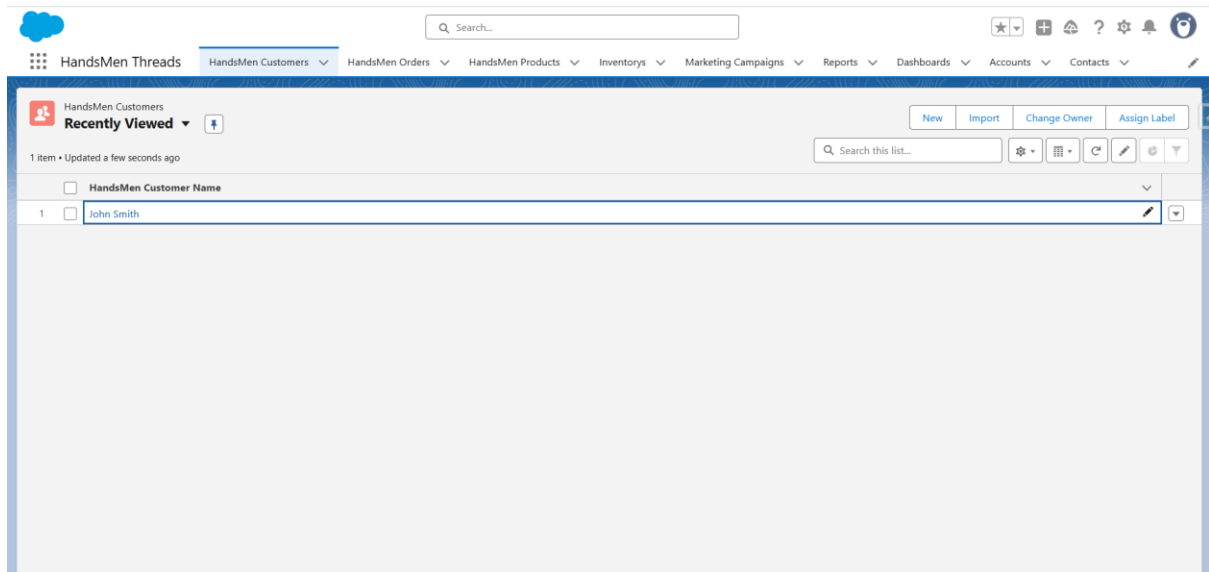
8. Scheduled Bulk Updates

- **Purpose:**

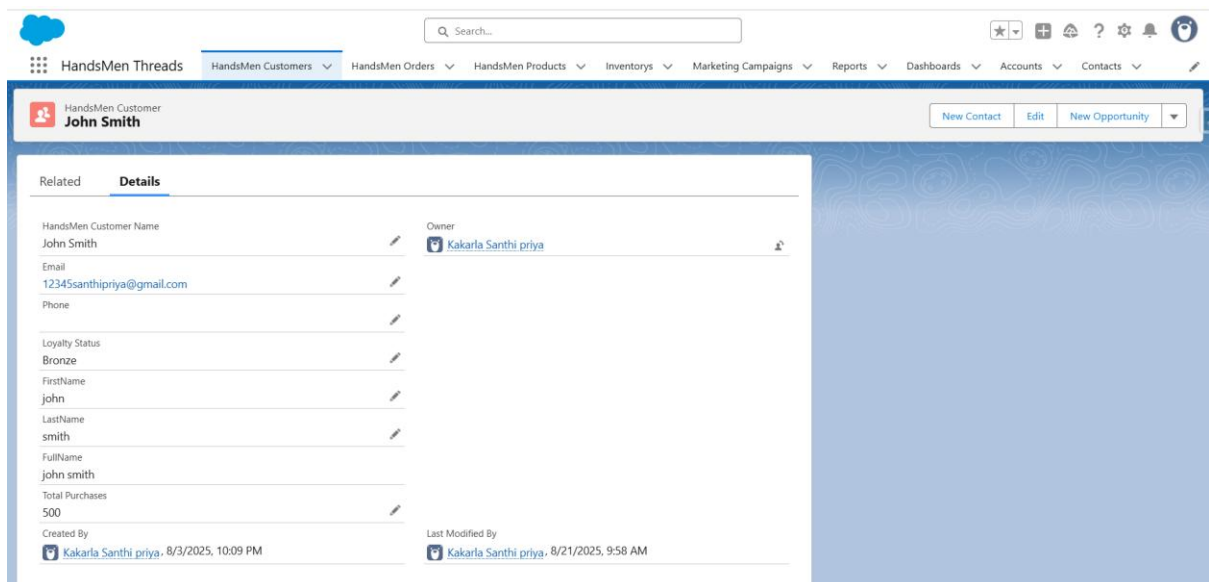
Every midnight, the system runs a batch process to update financial records and inventory data.

- **Real-World Example:**

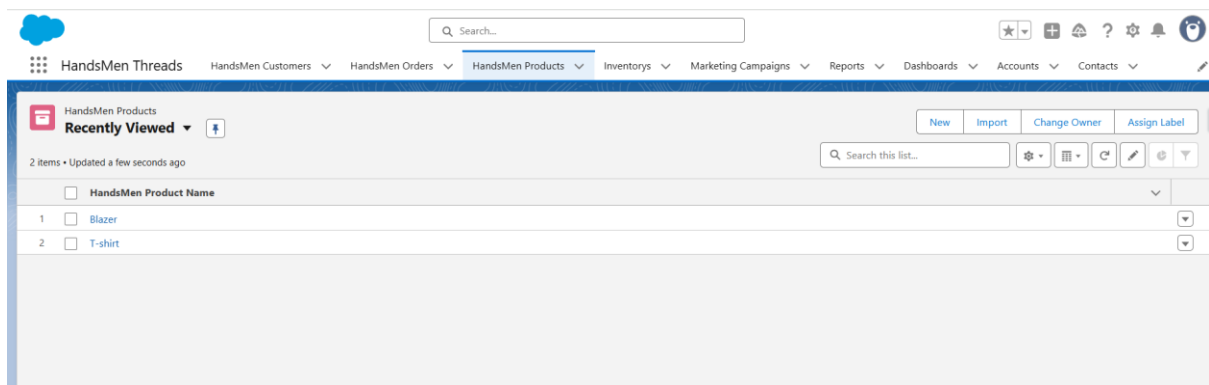
At 12:00 AM, Salesforce processes all orders placed during the day, updates customer loyalty points, adjusts stock, and prepares accurate reports for the next day's business.



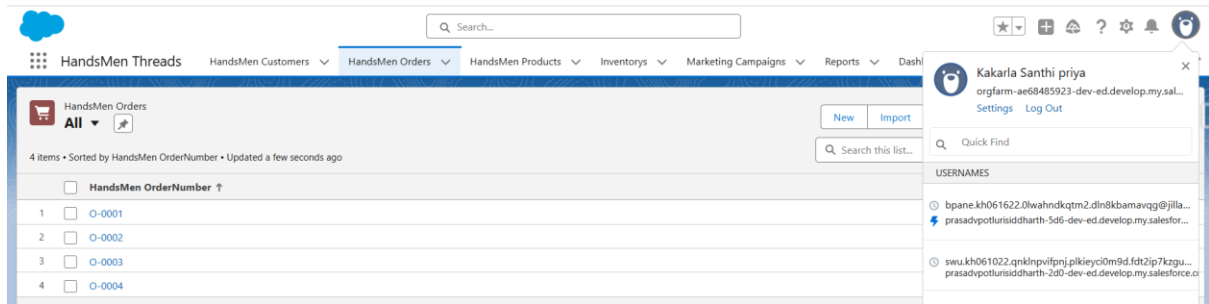
Custom App – HandsMen Threads



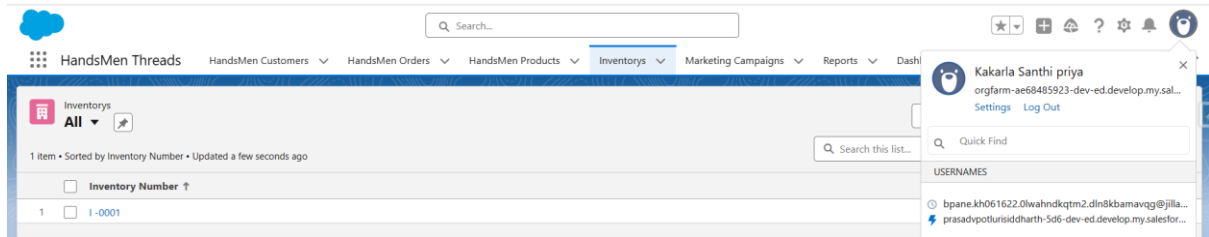
Created Customer in HandsMen Customers



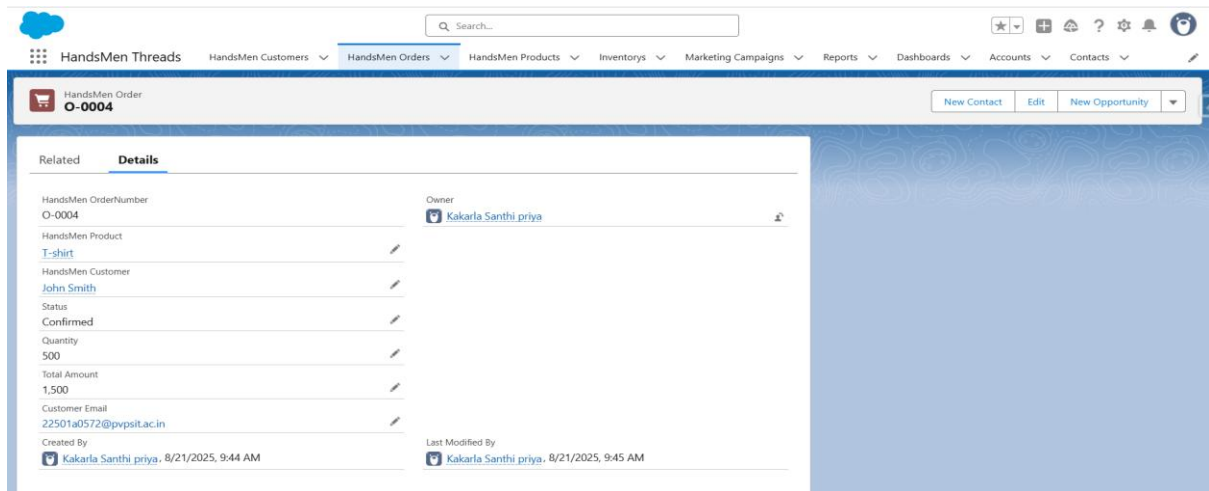
Products in HandsMen Products



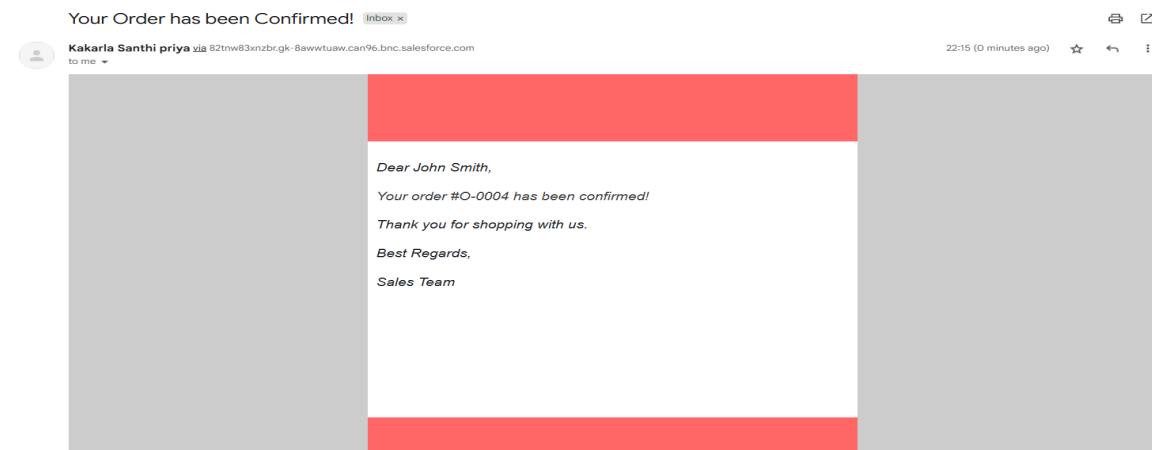
Orders made by Customers



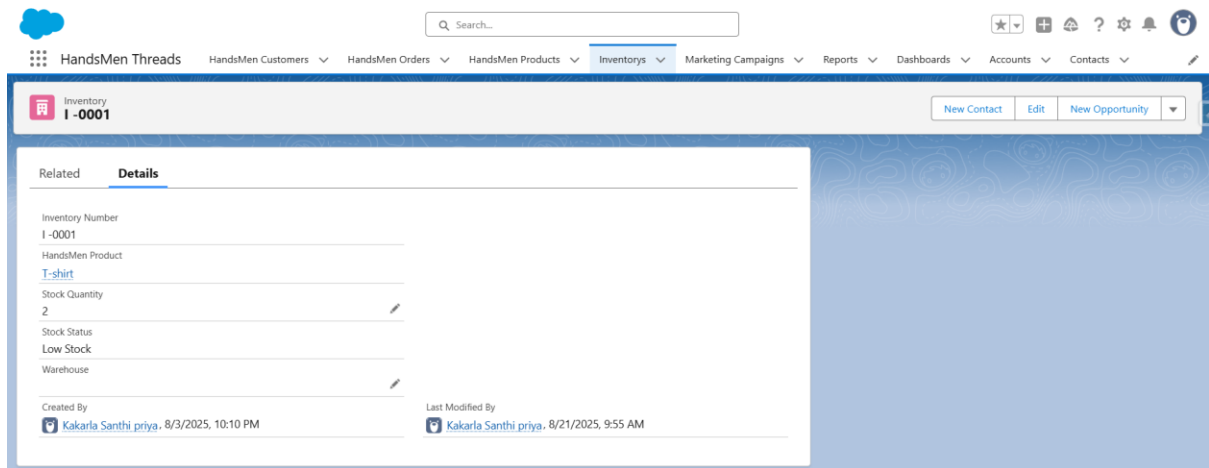
Inventory's to track stock quantity



Order Confirmation



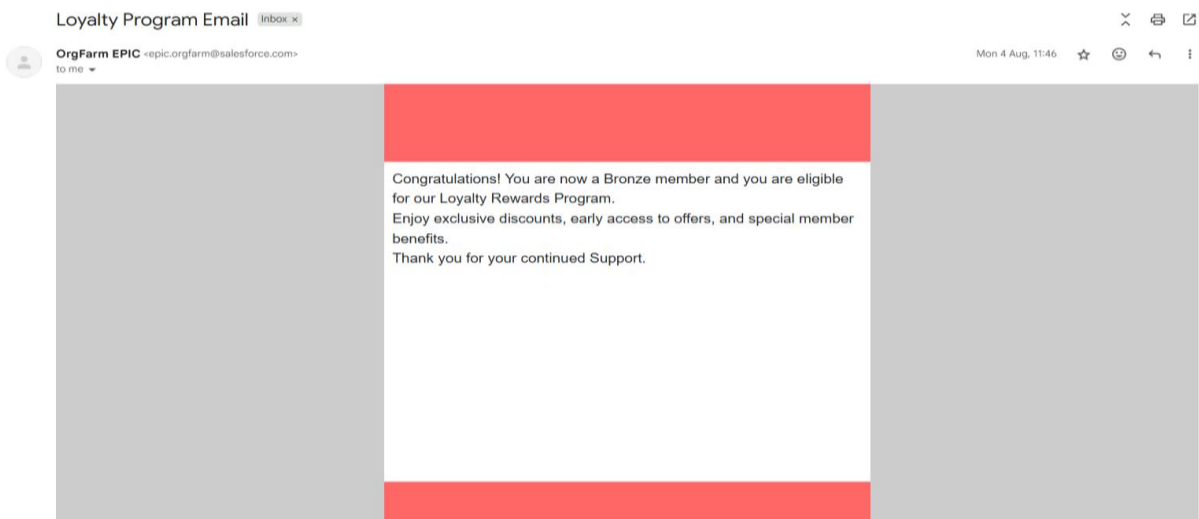
Order Confirmation Email



Low stock for T-shirts



Low stock email Alert



Loyalty program email to the customer

CONCLUSION:

The Salesforce solution implemented for HandsMen Threads centralizes business data, enforces accuracy with validations, and automates critical processes like order confirmations, stock level notifications, and loyalty program updates. By minimizing manual tasks and enabling real-time communication, the system not only improves customer satisfaction but also streamlines internal workflows. This foundation ensures greater efficiency today while providing the scalability needed to support future growth in the highly competitive fashion industry.