HANDSMEN THREADS

ELEVATING THE ART OF SOPHISTICATION IN MEN'S FASHION

A report submitted as part of the Virtual Internship Program Organized by SmartBridge in collaboration with Salesforce

ACKNOWLEDGMENT

I want to sincerely thank everyone who helped me finish this internship project successfully. I want to start by sincerely thanking my mentor for all their help, encouragement, and technical advice during the internship. Through their guidance, I was able to handle challenging assignments and develop a deeper comprehension of Salesforce.

Additionally, I want to express my gratitude to the SmartBridge team for setting up this online internship and offering a controlled learning environment. Their thoughtfully created modules, prompt assistance, and on-the-spot project assignments have greatly improved my exposure to the industry and my practical skills. I am appreciative of my institution's faculty members for their unwavering encouragement and scholarly assistance, which provided a solid basis for my education.

ABSTRACT

The creation and deployment of a Salesforce-based data management system for HandsMen Threads, a developing men's fashion brand, is presented in this report. A centralized, effective, and automated platform is now necessary as the business grows to manage growing amounts of data and client interactions. The project's goal was to create a scalable, user-friendly, and reliable Salesforce solution that was suited to HandsMen Threads' operational requirements.

- Numerous Salesforce components were used in the system's development, including:
- Orders, products, and customers are examples of business-specific entities that can be represented using custom objects.
- Order confirmations, stock alerts, and record updates can all be made more efficient and straightforward with the help of flows and process automation, which eliminates the need for human intervention.
- Complex business logic, including updating stock levels, computing order totals, and preserving data consistency across related records, can be handled by Apex Triggers.
- Apex Batch/Queueable jobs, also known as scheduled jobs, are used to automate recurring processes like creating reports or sending notifications.

CHAPTER 1: INTRODUCTION

1.1 OVERVIEW OF THE ORGANIZATION

HandsMen Threads is an emerging fashion brand specializing in premium, sophisticated clothing for men. With a vision to redefine men's fashion, the company combines modern design with high-quality fabrics to offer products that appeal to style-conscious customers. As the brand continues to expand its operations, manage a growing customer base, and handle diverse inventory, it has identified the need for a scalable, centralized digital platform. To support its growth and streamline internal operations, HandsMen Threads has embraced Salesforce CRM as a core component of its digital transformation strategy.

1.2 OBJECTIVE OF THE PROJECT

Designing, creating, and implementing a tailored Salesforce solution that meets HandsMen Threads' operational requirements is the main goal of this project. The purpose of this solution is to:

- Simplify inventory tracking and order management.
- Boost client interaction with data-driven insights and automated communication.
- Use Apex triggers, scheduled automation, and flows to automate important business processes.
- Assure data integrity and consistency across all relationships and objects.

1.3 SCOPE OF THE PROJECT

The project's scope includes several Salesforce functional and technical domains. Important elements consist of:

➢ **Data modeling:** Data modeling is the process of building unique objects with the right fields, relationships, and schema architecture, like HandsMen_Order__c, HandsMen_Product__c, and HandsMen_Customer__c, to replicate the actual business structure.

➢ **Automation:** Using Apex Triggers, Record-Triggered Flows, and Flows to manage intricate business logic, including task delegation, email alerts, order total computation, and product stock updates.

➢ **Scheduled Processes:** Creating Queueable Jobs or Apex Batch for repetitive tasks like sending out reminders or creating reports.

➢ **Email Notifications:** Setting up automated email alerts to inform clients and employees of critical situations, such as shipment updates, order confirmations, and low stock alerts.

CHAPTER 2: PROJECT USE CASE

2.1 USE CASE SCENARIO

To streamline HandsMen Threads' core operations—specifically, the management of customer orders, product inventory, and engagement workflows—a centralized Salesforce system will be implemented.

Information was dispersed through spreadsheets and separate apps in the previous system, which caused delays and inconsistencies in business operations. Sales, inventory management, customer engagement, and notifications are just a few of the business operations that the new Salesforce solution unifies onto a single cloud platform.

2.2 PROBLEM STATEMENT

HandsMen Threads handled orders and inventory primarily through spreadsheets and disjointed systems before implementing Salesforce. This led to several difficulties, such as:

- Order processing was delayed because manual data entry and approvals were required.
- Mismatches in inventory can result in either overselling or understocking of goods.
- Teams found it challenging to make prompt decisions due to a lack of real-time insights.

2.3 EXPECTED OUTCOMES

These issues were addressed by the Salesforce-based solution, which produced the following results:

➤ **Automated Order Verifications:** After placing an order, customers receive immediate email confirmations, increasing openness and confidence.
➤ **Updates on Loyalty in Real Time:** To guarantee that customers receive their rewards on time, the system automatically updates loyalty points based on order value.
➤ **Stock Notifications to the Warehouse Staff:** Automated alerts are sent to the warehouse or inventory manager for prompt restocking when product stock hits a predetermined threshold.

CHAPTER 3: USER STORY AND FUNCTIONAL REQUIREMENTS

3.1 USER STORY

"As a sales manager, I want to be able to efficiently manage customer orders and get real-time inventory updates so that I can guarantee customer satisfaction and order fulfillment on time."

3.2 KEY FUNCTIONAL REQUIREMENTS

- Keep track of and stock orders
- Keep track of your product inventory.
- Automate processes.
- Access control based on roles
- Automation of emails

CHAPTER 4: SYSTEM DESIGN & ARCHITECTURE

4.1 Salesforce Setup and Credentials

For this project, a Salesforce Developer Edition Org was provisioned to simulate a production-like environment. This environment provided full access to essential Salesforce features, including custom object creation, automation tools (Flow, Apex), and security configurations.

- Secure login credentials were maintained, and role-based users were created for testing different access levels.
- Two-factor authentication (2FA) was enabled to ensure secure access.

4.2 OBJECT AND FIELD SCHEMA

To support the specific business needs of HandsMen Threads, several custom objects were designed in addition to standard Salesforce objects. Each object was equipped with appropriate custom fields, relationships, and validation rules to enforce data integrity.

Key objects and fields include:

➢ **HandsMen_Order__c**
   Fields: Order_Date__c, Order_Quantity__c, Order_Status__c, Total_Amount__c, Loyalty_Updated__c, HandsMen_Customer__c

- **HandsMen_Product__c**
  - **Fields:** Product_Name__c, Product_Category__c, Available_Stock__c, Price__c, Reorder_Level__c
- **HandsMen_Customer__c**
  - **Fields:** Customer_Name__c, Email__c, Phone__c, Loyalty_Status__c, Total_Purchase_Value__c

4.3 APP AND TAB CONFIGURATION

A custom Lightning App named HandsMen Order Manager was created using Lightning App Builder, offering a personalized and user-friendly interface for internal users.

Key configurations include:

- **Custom Tabs for:**
  - Orders
  - Products
  - Customers
  - Dashboards & Reports
- **Lightning Record Pages customized with:**
  - Dynamic Forms and visibility rules for conditionally displaying fields
  - Related Record Components to quickly access related product and customer data from an order page

CHAPTER 5: DATA MANAGEMENT

5.1 CUSTOM OBJECTS

➢ **HandsMen_Customer__c:** Used to store detailed information about each customer, including name, contact details, total purchase value, and loyalty status. This object serves as the foundation for customer relationship management, enabling personalized engagement, loyalty tracking, and targeted communication.

➢ **HandsMen_Order__c:** Used to store detailed information about each customer order, including order date, quantity, product ordered, and associated customer. This object forms the backbone of order management workflows.

➢ **HandsMen_Product__c:** Used to maintain product details such as product name, category, available stock, price, and reorder levels. It plays a vital role in inventory tracking and stock management automation.

5.2 FIELDS

➢ **Order Fields:**
Order_Quantity__c, Order_Date__c, Total_Amount__c, Loyalty_Updated__c, Email_Sent__c, Order_Status__c

➢ **Product Fields:**
Available_Stock__c, Price__c, Product_Category__c, Reorder_Level__c

➢ **Customer Fields:**
Loyalty_Status__c, Total_Purchase_Value__c, Preferred_Contact_Method__c

5.3 TABS

To improve user accessibility, custom tabs were created and added to the HandsMen Threads App:

- HandsMen Orders
- HandsMen Products
- HandsMen Customers

5.4 DATA CONFIGURATION

➢ **Picklists**:
Used for fields like Order_Status__c (e.g., Pending, Confirmed, Shipped, Cancelled) and Loyalty_Status__c (e.g., Silver, Gold, Bronze), ensuring standardized data input.

➢ **Validation Rules**:
Enforced business rules such as preventing order quantity from exceeding available stock, or blocking save if the email field is empty during order creation.

➢ **Default Values**:
Pre-filled fields such as Order_Status__c = Pending on new record creation to streamline user input and maintain consistency.

CHAPTER 6: AUTOMATION & WORKFLOWS

6.1 RECORD-TRIGGERED FLOWS

Record-Triggered Flows were used to automate key business processes in real time. These flows run automatically when a record is created or updated, allowing the system to update loyalty points, adjust inventory levels, and send email notifications without manual input. This helped improve efficiency and ensure consistent, rule-based automation across the platform.

6.2 EMAIL TEMPLATES:

Email Templates were created using Salesforce's Lightning Email Builder to send order confirmation emails to customers. The templates used dynamic merger fields to pull relevant details from the order record, such as customer name, product details, and order date. This ensured personalized, consistent communication and enhanced overall customer experience.

6.3 APEX AUTOMATION:

Apex triggers were implemented to handle backend automation that required complex logic. These triggers were used to calculate the total order amount, update product stock based on order quantity, and maintain data integrity across related records. Apex provided the flexibility to extend business logic beyond what was achievable with declarative tools.

CHAPTER 7: BUSINESS LOGIC IMPLEMENTATION

7.1 ORDER CONFIRMATION EMAIL

An order confirmation email automation was implemented using a record-triggered flow in Salesforce. When a new order record is created, the flow retrieves relevant order details and sends an email to the customer using a predefined Lightning email template. This ensures immediate acknowledgment of the customer's purchase, improving communication and building trust with minimal manual intervention.

7.2 LOYALTY PROGRAM LOGIC

The loyalty program logic was designed to automatically update a customer's loyalty status based on their total purchase value. A formula field calculates the cumulative amount spent by the customer, and a flow uses this value to assign a loyalty tier such as Silver, Gold, or Platinum. The process runs in real time, ensuring that loyalty rewards remain accurate and up to date without requiring manual calculations.

7.3 STOCK ALERT AUTOMATION

To ensure proactive inventory management, stock alert automation was set up using a record-triggered flow. When the stock available for any product falls below a defined threshold, an automated email is sent to the warehouse or inventory team. This logic helps prevent stockouts, supports timely replenishment, and improves overall order fulfillment efficiency.

CHAPTER 8: CHALLENGES AND SOLUTIONS

8.1 Apex Trigger Errors and Flow Debug Issues

Problem:

While implementing business logic through Apex triggers and flows, frequent execution errors were encountered. Triggers failed due to null values or incorrect logic, and flows did not behave as expected during record updates. This caused delays in automation such as order total calculation and email notifications.

Solution:
To resolve this, debug logs were enabled and carefully analyzed to

identify the root cause of the failures. Trigger conditions were simplified, and null checks were added to prevent execution errors. Flows were tested with different input scenarios, and unnecessary decision branches were removed. This approach ensured smooth automation and reliable trigger performance.

8.2 Data Visibility Issues Across Roles

Problem:

Users from different departments faced data access restrictions based on their roles. For instance, sales managers couldn't see inventory details, and warehouse staff couldn't access relevant order information. This created bottlenecks in daily operations and restricted collaboration.

Solution:
The role hierarchy and sharing settings were reconfigured to allow appropriate data access while maintaining security. Organization-Wide Defaults (OWDs) were reviewed and adjusted, and permission sets were created to give specific field-level and object-level access. This ensured that each user had the right level of visibility needed for their responsibilities without compromising data confidentiality.

CHAPTER 9: CONCLUSION

The Salesforce-based solution developed for **HandsMen Threads** successfully addresses the organization's growing need for streamlined data management, order processing, and customer engagement. By leveraging Salesforce's core features such as custom objects, flows, Apex triggers, and automation tools, a

scalable and efficient system was built to manage orders, inventory, and loyalty programs seamlessly.

Throughout the project, real-time automation was implemented to eliminate manual tasks, improve accuracy, and enhance customer experience. Challenges such as debugging Apex triggers and managing role-based access were overcome through systematic testing and configuration, resulting in a stable and secure application.

CHAPTER 10: FUTURE ENHANCEMENTS

While the current Salesforce implementation effectively meets the core business needs of HandsMen Threads, there is potential for further enhancement to improve scalability, user experience, and analytical capabilities. The following future enhancements are proposed to extend the functionality of the system:

One key enhancement is the integration of Salesforce Reports and Dashboards to provide real-time insights into sales performance, stock levels, and customer behavior. This will enable data-driven decision-making and better performance monitoring. Additionally, Einstein AI features such as predictive lead scoring or product recommendation can be explored to personalize customer engagement and increase conversion rates.

Another improvement could be the integration of external systems such as accounting software or e-commerce platforms, enabling a seamless flow of information between departments. This would help automate invoicing, sync order data, and unify customer records across channels.

CHAPTER 11: APPENDICES

Fig: Developer Edition Page

Fig: HandsMen Threads Main Page

Fig: HandsMen Threads Customer Page

Fig: HandsMen Threads Orders Page
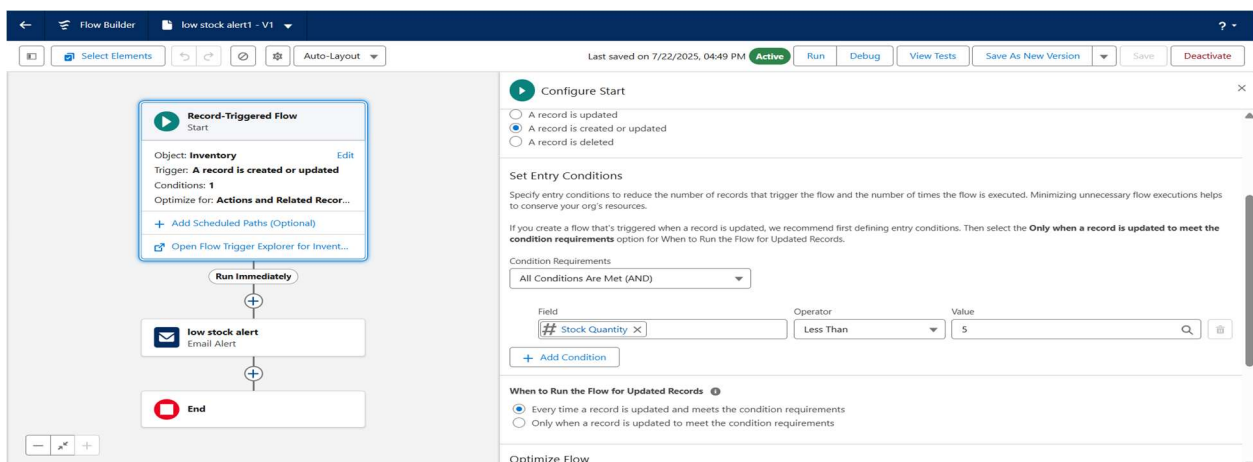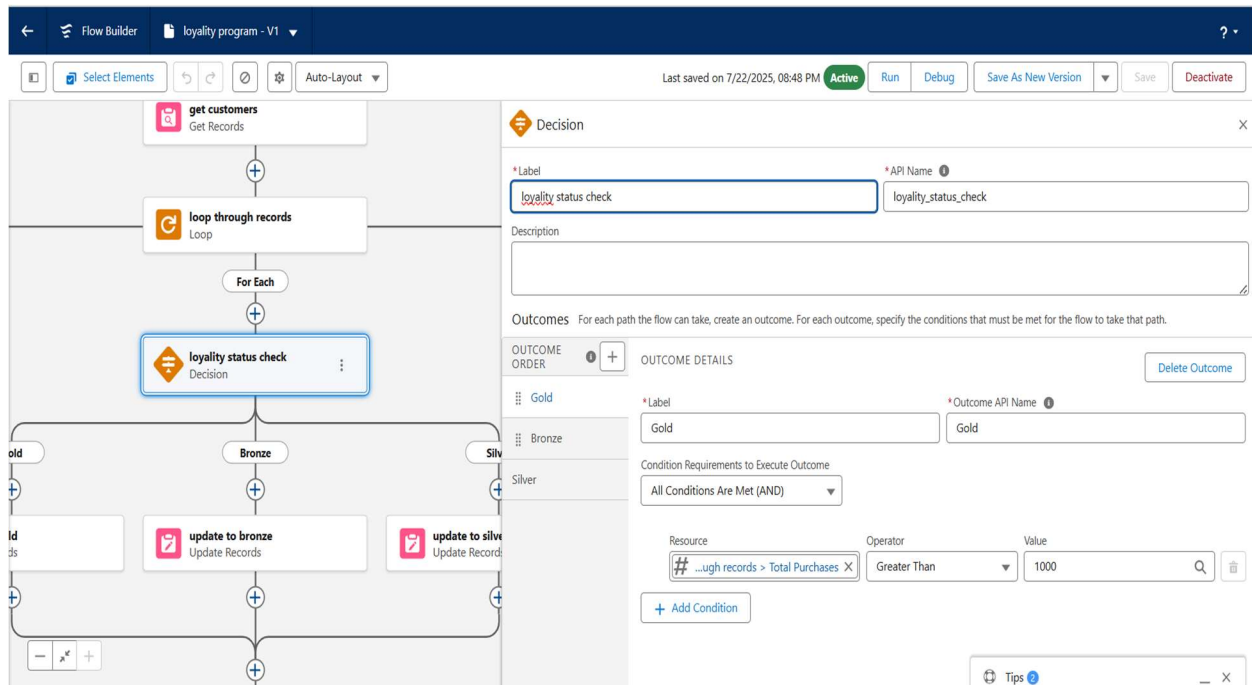

Fig: HandsMen Threads Products Page
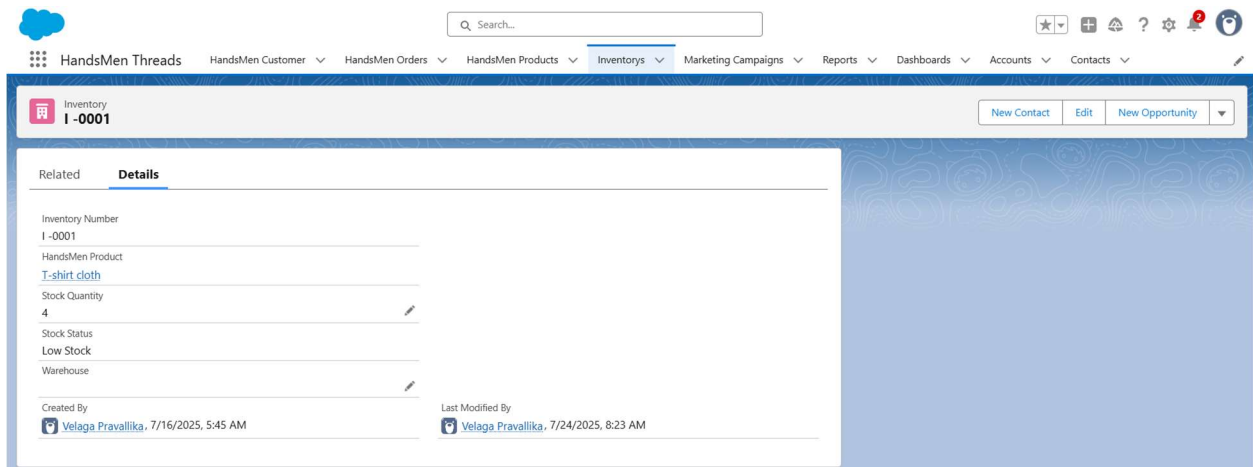
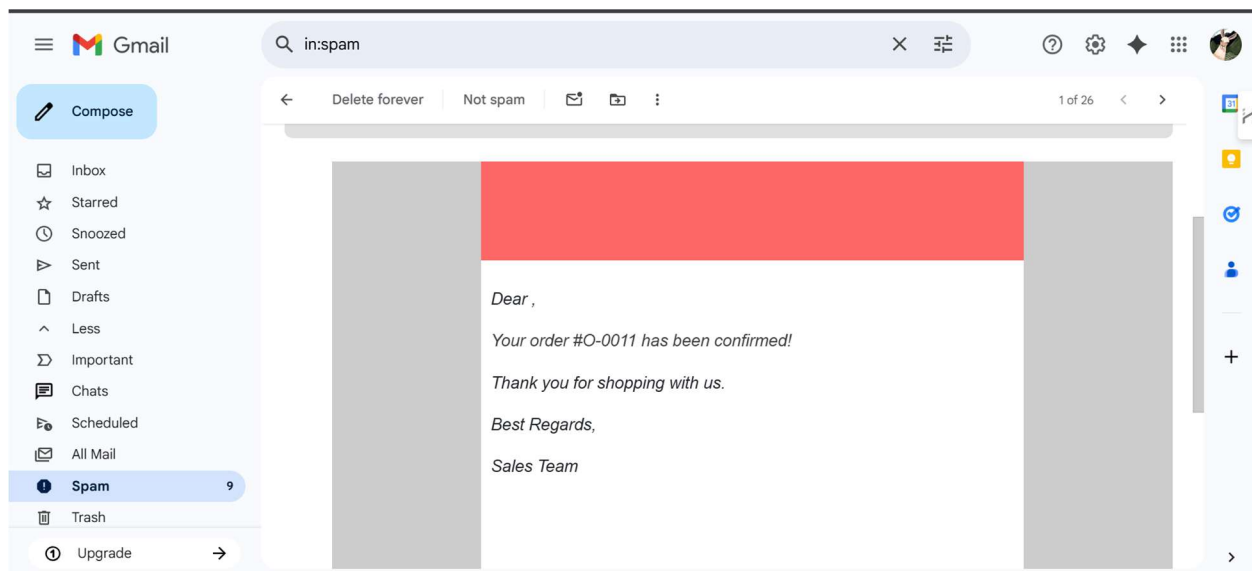**Fig: HandsMen Threads Inventory Page**
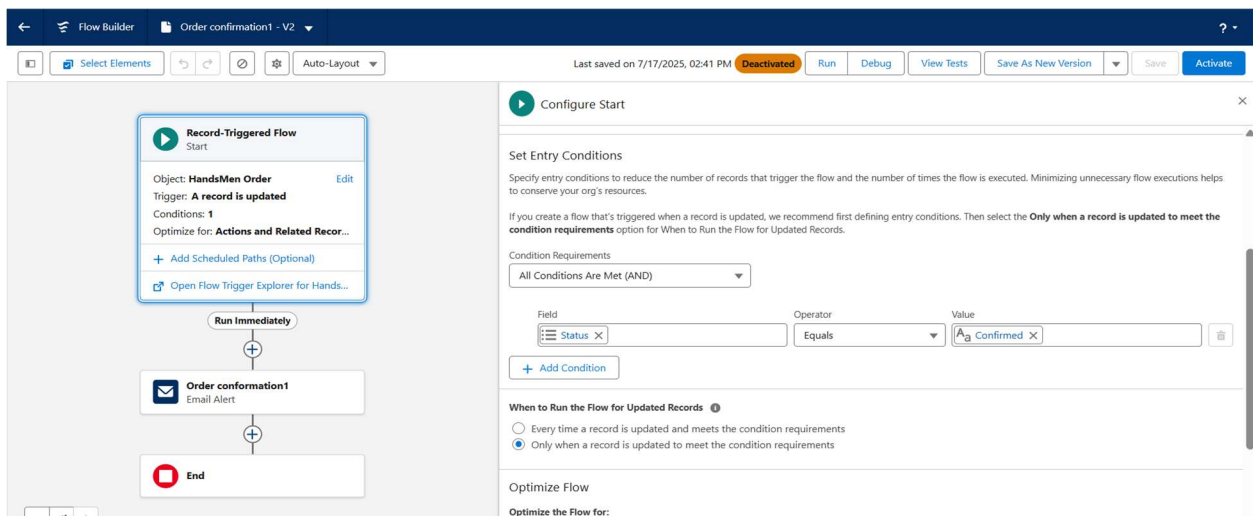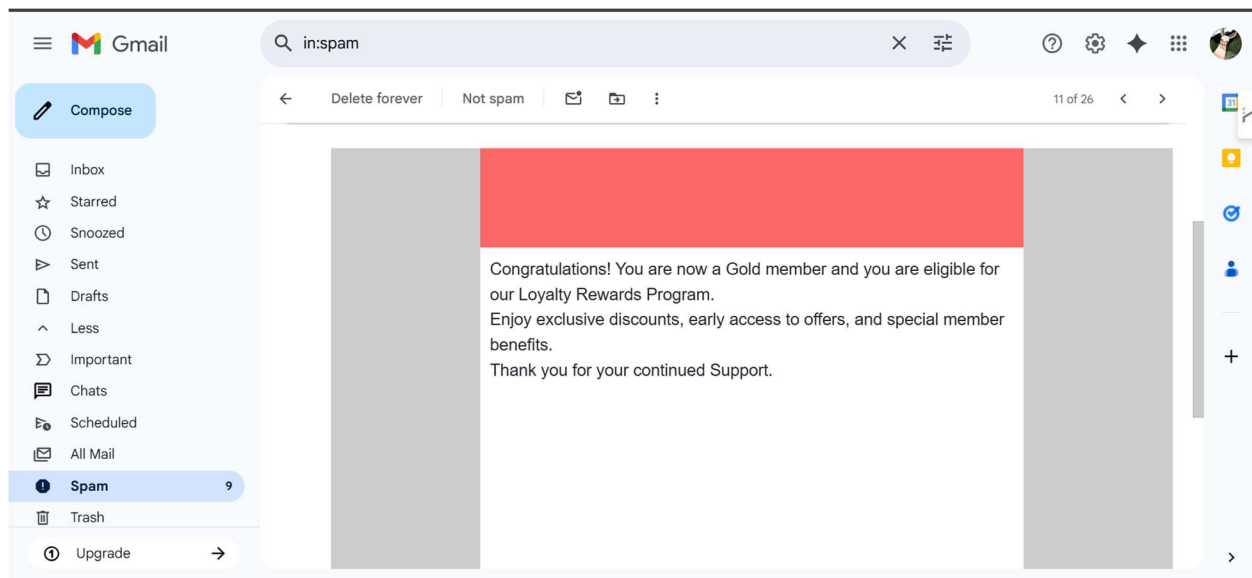

Fig: Order Confirmation Flow

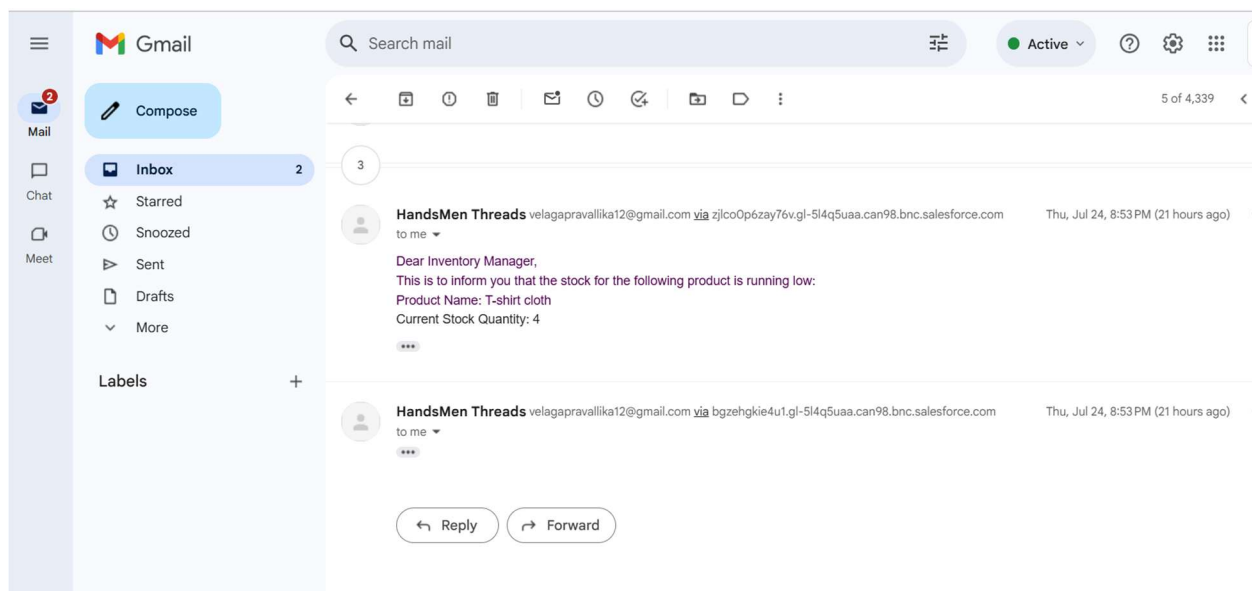**Fig: Low Stock Alert Flow**

Fig: Loyalty Program flow

Fig: Order Confirmation Email

Fig: Loyalty Program Email

Fig: Low Stock Alert