HandsMen Threads – Salesforce Virtual Internship Project Report

# Abstract

HandsMen Threads is an innovative Salesforce-based application developed as part of the Salesforce Virtual Internship Program. The application is designed specifically for a premium men’s fashion brand that wanted to digitize and automate its core operations. This project emphasizes automating critical business workflows, including sending order confirmations to customers, managing dynamic customer loyalty programs, monitoring inventory stock levels, and scheduling bulk updates for large datasets.

The primary aim was to reduce manual intervention in these processes and create a seamless, user-friendly system that supports real-time data updates and decision-making. Using Salesforce’s advanced tools such as Lightning App Builder, Record-Triggered Flows, and Scheduled Flows, the project delivers a scalable and efficient solution that not only improves operational efficiency but also enhances customer engagement and satisfaction.

# The HandsMen Threads project was undertaken with the following objectives:

✅ **1. Automate Order Confirmations**  
To ensure that customers receive immediate and professional email confirmations whenever they place an order, improving customer trust and satisfaction.

✅ **2. Manage Customer Loyalty Tiers**  
To dynamically track customers’ purchase history and assign them appropriate loyalty tiers, encouraging repeat business and fostering brand loyalty.

✅ **3. Enable Stock Availability Alerts**  
To provide proactive notifications to inventory managers whenever stock levels drop below a specified threshold, preventing stockouts and ensuring uninterrupted service.

✅ **4. Schedule Bulk Record Updates**  
To create automation that performs bulk updates on records at regular intervals, reducing the need for manual updates and minimizing errors.

✅ **5. Improve Operational Efficiency**  
To design a system that significantly reduces manual work, streamlines processes, and allows the business to scale operations effortlessly.

Each of these objectives contributed to building a robust system that aligns with modern retail requirements and customer expectations.

# Technology Used

The following Salesforce tools and features were used to develop the HandsMen Threads application:

* **Salesforce Lightning App Builder** – Used to design a customized user interface that makes data access and management intuitive for users.
* **Record-Triggered Flows** – Enabled automation of workflows triggered by real-time data changes, such as sending confirmation emails or updating loyalty tiers.
* **Scheduled Flows** – Allowed the automation of processes at defined intervals, like performing bulk updates to records.
* **Custom Objects and Fields** – Provided the foundation for storing and managing data related to Orders, Customers, and Inventory, with fields such as Order ID, Loyalty Tier, and Stock Quantity.
* (Optional) **Lightning Web Components** – Could be used to further enhance the UI for advanced data visualization or user interactions.

This combination of Salesforce’s low-code and declarative tools resulted in a highly flexible and powerful application.

# Execution of Project Phases

#### 📌 ****Phase 1: Requirement Gathering****

The first phase involved understanding the business needs of HandsMen Threads and analyzing existing manual workflows. Interviews with hypothetical stakeholders were considered to identify critical pain points such as delays in customer notifications, difficulty tracking customer loyalty, and challenges in inventory management.

A requirement document was prepared outlining the key features to be implemented:

* Real-time order confirmation notifications
* Loyalty tier management system
* Stock level monitoring and alerts
* Periodic bulk updates for pricing and stock data

This phase set a clear foundation for designing a Salesforce solution aligned with industry best practices.

#### 📌 ****Phase 2: Design and Planning****

In the design phase, custom objects such as Orders, Customers, and Inventory were created in Salesforce Object Manager. Fields like Order Date, Loyalty Tier, Stock Quantity, and Order Status were added to these objects to enable comprehensive data tracking.

Relationships between objects were carefully defined to ensure data integrity. For example:

* Orders were linked to Customers through lookup relationships.
* Inventory objects were connected to Orders for real-time stock tracking.

The Lightning App Builder was used to design page layouts and navigation menus, making the system user-friendly. Wireframes of the UI were drafted to visualize the customer journey and workflow automation.

#### 📌 ****Phase 3: Implementation****

The core functionality of the HandsMen Threads application was implemented using Salesforce’s Flow Builder:

* **Order Confirmation Flow:** This Record-Triggered Flow automatically sends a customized email to the customer when a new Order record is created.
* **Loyalty Program Flow:** Updates a customer’s loyalty tier based on their total purchase amount, encouraging repeat purchases.
* **Stock Alert Flow:** Monitors stock levels and sends notifications to inventory managers when a product’s quantity drops below the threshold.
* **Scheduled Bulk Update Flow:** Runs periodically (daily/weekly) to update large volumes of data, such as price adjustments or inventory replenishment statuses.

Each flow was designed to run efficiently with minimal user intervention, leveraging Salesforce’s automation capabilities.

#### 📌 ****Phase 4: Testing****

Extensive testing was performed to ensure the system met all requirements. This included:

* **Unit Testing:** Individual flows were tested using debug logs to verify their functionality.
* **Integration Testing:** The interaction between different objects and flows was validated.
* **Edge Case Testing:** Scenarios like extremely large orders or very low stock levels were tested to check system stability.

Issues discovered during testing were logged and resolved, ensuring the application was robust and error-free.

#### 📌 ****Phase 5: Deployment****

The finalized application was deployed in the Salesforce developer environment. All configurations and flows were activated, and end-users were given access to the app.

A demonstration video was recorded showcasing the app’s functionality, and documentation was prepared for submission as part of the Salesforce Virtual Internship program.

# Result

The HandsMen Threads application successfully achieved its objectives:

* Order confirmations were automated, ensuring customers received timely communication.
* Loyalty tiers were updated dynamically, supporting customer retention strategies.
* Stock alerts allowed proactive inventory management.
* Scheduled Flows reduced manual intervention for bulk updates.

Overall, the system streamlined operations and improved efficiency across multiple business processes.

# Conclusion

This project shows how Salesforce can be used to build effective business solutions. By automating workflows and creating a user-friendly system, the HandsMen Threads app successfully improved operational efficiency and enhanced customer satisfaction.