

# **SALESFORCE INTERNSHIP PROJECT REPORT**

## **Project Title:**

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

## **Internship Organization:**

SmartBridge (Salesforce Track)

## **Institution Name:**

SRM University AP

**Student Name:** Ganta.Rajesh

**Program & Department:** B.Tech, CSE

**Internship Duration:** 2Months

# **1. Introduction**

This report outlines the Salesforce internship project undertaken as part of the academic curriculum at SRM University AP, in collaboration with SmartBridge under the Salesforce Developer track. The objective of this internship was to gain practical exposure to cloud-based CRM platforms and apply theoretical knowledge to real-world business problems.

The project, titled HandsMen Threads – Elevating the Art of Sophistication in Men's Fashion, focuses on developing a customized Salesforce solution for a premium men's fashion brand. The brand aims to offer high-quality bespoke tailoring and styling services. Our Salesforce implementation was designed to streamline business operations, improve customer relationship management, and automate workflows across various departments such as sales, inventory, and customer support.

By using Salesforce tools like custom objects, flows, Apex triggers, dashboards, and role-based access control, the project showcases how technology can enhance traditional business models and deliver an efficient and user-friendly experience for both employees and customers.

## **2. Project Objective**

The main goal of this project is to design, build, and implement a comprehensive CRM solution on the Salesforce platform tailored for a fashion-focused business model. The key objectives include:

- To develop a scalable and customizable Salesforce-based CRM system for a premium men's fashion brand, enabling better customer service and streamlined operations.
- To capture and manage data related to customers, employees, inventory, products, and orders using custom objects and data models within Salesforce.
- To automate business processes such as order assignment, loyalty status updates, and low-stock alerts through the use of Record-Triggered Flows, Apex logic, and email notifications.
- To establish role-based security and data access using profiles, roles, and permission sets tailored to different user groups like Sales Executives, Inventory Managers, and Servers.
- To design and build interactive dashboards and reports for performance tracking, decision-making, and business intelligence insights.
- To gain hands-on experience with real-time use cases, thereby applying Salesforce skills in configuration, development, and deployment in a live business scenario.

Through this project, we aimed not only to address the practical needs of the business but also to enhance our understanding of CRM strategies, Salesforce architecture, and enterprise-level application development.

### **3. Use Case:**

#### **Salesforce Implementation for HandsMen Threads**

## Overview

This use case section highlights the business processes automated using Salesforce through the custom object **HandsMen\_Order\_\_c**, designed to streamline order management, enhance customer interaction, and improve internal efficiency for HandsMen Threads.

### Use Case 1: Automated Order Confirmation

- **User Roles Involved:** Customer, Sales Executive, Salesforce System
- **Preconditions:** A new HandsMen\_Order\_\_c record is created.
- **Trigger:** A sales executive creates a new order.

#### Main Flow:

1. Sales Executive logs a new order using HandsMen\_Order\_\_c.
2. A flow is triggered that sends a confirmation email to the customer's registered email address.
3. Order details (customer, items, date, total) are saved and linked to the HandsMen\_Customer\_\_c record.
4. Email activity is logged for audit and communication tracking.

#### Outcome:

Customer receives immediate confirmation, enhancing trust and experience.

### Use Case 2: Dynamic Loyalty Program

- **User Roles Involved:** Customer, Salesforce System
- **Preconditions:** Customer must have existing HandsMen\_Order\_\_c records.
- **Trigger:** A new order is created or an existing order is updated.

#### Main Flow:

1. Salesforce Flow retrieves the total value of all orders linked to a customer.
2. Based on defined thresholds, the Loyalty\_Status\_\_c field on the HandsMen\_Customer\_\_c object is updated (e.g., Bronze, Silver, Gold).
3. Status changes may trigger email notifications or special offers.

**Outcome:**

Loyal customers are rewarded automatically, increasing retention and personalized engagement.

**Use Case 3: Proactive Stock Alerts**

- **User Roles Involved:** Inventory Manager, Salesforce System
- **Preconditions:** Product and inventory are tracked using Inventory\_\_c with Stock\_Quantity\_\_c.
- **Trigger:** A product's stock falls below the threshold after order placement.

**Main Flow:**

1. A record-triggered flow watches Stock\_Quantity\_\_c in Inventory\_\_c.
2. When quantity < 5, Salesforce sends an automatic alert email to the Inventory Manager or Warehouse Team.
3. The email includes SKU, Product Name, and remaining quantity.

**Outcome:**

Team is notified to reorder before items go out of stock, maintaining operational efficiency.

**Use Case 4: Scheduled Bulk Order Updates**

- **User Roles Involved:** Salesforce System (Batch + Scheduler), Finance/Admin Team
- **Preconditions:** Orders exist in the HandsMen\_Order\_\_c object.
- **Trigger:** A scheduled batch process runs daily at midnight.

**Main Flow:**

1. The Apex scheduler activates a batch job that processes all HandsMen\_Order\_\_c records from the past day.
2. Financial totals are updated and inventory is adjusted based on ordered items.
3. Summary reports are updated and shared with the management team.

**Outcome:**

Real-time reporting accuracy and operational readiness for the next business day.

## 4. USER STORY:

### 4.1

#### **Phase 1: Architecture & Planning**

This phase focused on analyzing business requirements and translating them into a scalable Salesforce architecture.

- Defined custom objects (e.g., HandsMen\_Order\_\_c, Inventory\_\_c, Product\_\_c, Employee\_\_c, Customer\_\_c).
- Established relationships (Lookup and Master-Detail).
- Designed key fields including formula fields and roll-up summaries.
- Created validation rules to ensure data quality.
- Planned automation processes using:
  - Record-triggered flows
  - Apex triggers
  - Batch jobs for scheduled processing
- Designed email templates for:
  - Order confirmation
  - Stock alerts
  - Loyalty status updates

#### **Phase 2: Development**

This phase involved the actual configuration and customization within Salesforce.

- Created all necessary custom objects and fields.
- Implemented automation:
  - Flows for order confirmation, loyalty updates, and inventory alerts.

- Process Builders (where applicable).
  - Apex triggers for dynamic logic.
- Developed batch Apex jobs for scheduled midnight processing of bulk orders.
- Configured field-level security, object permissions, roles, and sharing rules.
- Integrated email templates with automation tools.

### **Phase 3: Testing & Quality Assurance**

This phase ensured functional correctness and system reliability.

- Performed unit testing on:
  - Flows
  - Triggers
  - Batch jobs
- Conducted end-to-end testing using sample test data.
- Validated automation logic with edge cases.
- Conducted security testing (role-based visibility, field accessibility).
- Ensured scalability and response time under expected user load.

### **Phase 4: Deployment & User Training**

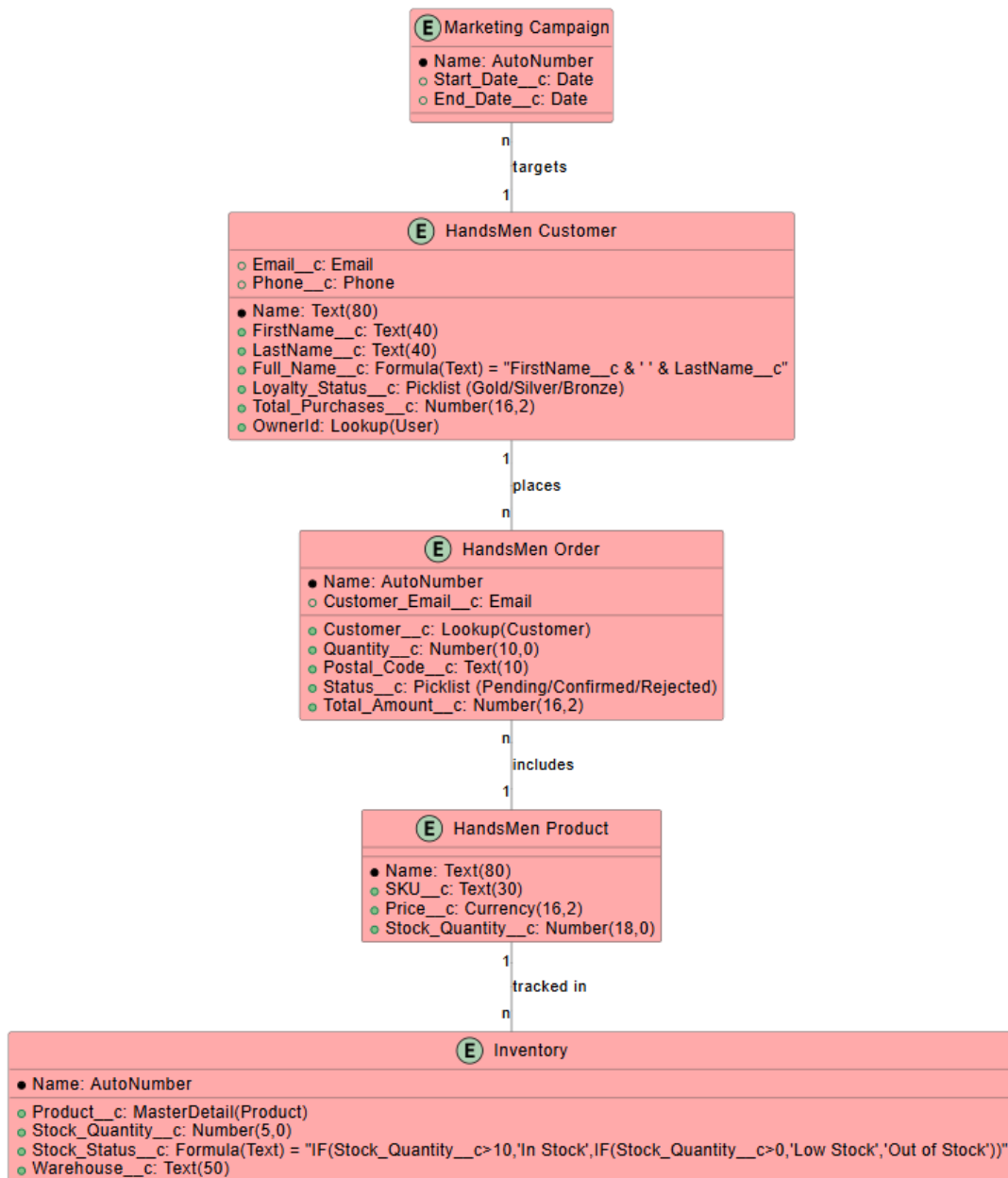
This phase focused on production rollout and user adoption.

- Migrated the solution from sandbox to production using change sets.
- Provided walkthrough sessions and training materials for:
  - Sales consultants
  - CRM managers

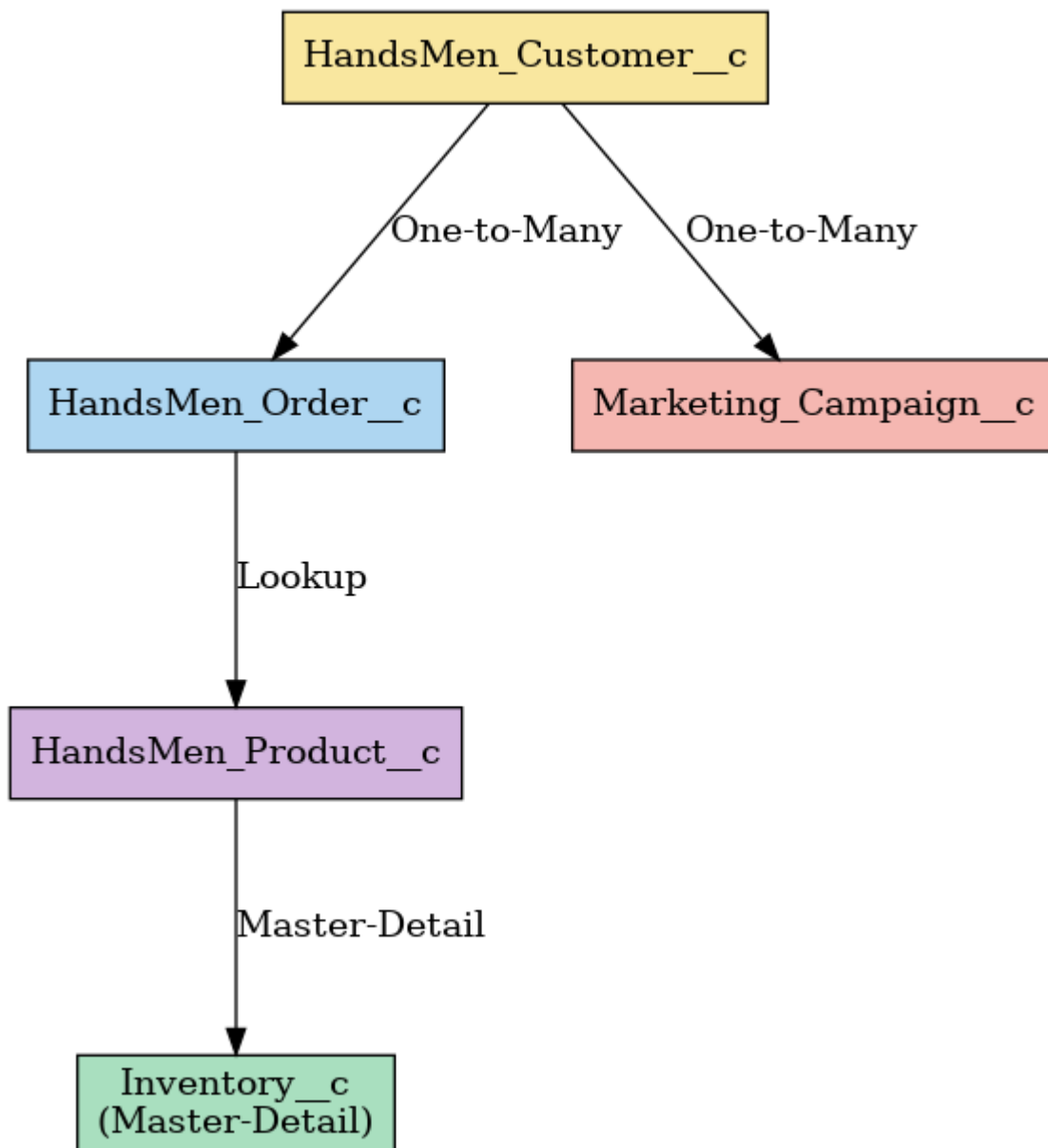


- Inventory staff
- Established post-go-live monitoring:
  - Tracking system logs
  - Debugging any live issues
  - Ensuring smooth user experience

## ERD Diagram



## Object Model:



## **4.2 Automation Strategy – HandsMen Threads**

The Salesforce automation strategy for the HandsMen Threads project is designed to streamline customer interactions, order management, inventory control, and campaign communication through the use of Flows, Apex Triggers, Scheduled Batch Jobs, and Email Alerts.

### **Flow Automations**

#### **Loyalty Status Flow:**

This is a record-triggered flow activated when an order's status changes to "Delivered." It fetches the associated customer record, calculates their total purchase value, and updates the loyalty status accordingly. If the total is ₹5000 or more, the status is updated to Gold. If it falls between ₹2500 and ₹4999, it's updated to Silver. Any value below ₹2500 assigns a Bronze status. This encourages repeat purchases and helps in segmenting customers based on value.

#### **Stock Alert Flow:**

**This automation is triggered when a record in the Inventory object is updated and the stock quantity drops below five units. The flow automatically updates the stock status to "Low Stock" and sends a real-time alert to the warehouse team. This ensures timely restocking and prevents order delays due to stockouts.**

#### **Order Confirmation Flow:**

**After an order is marked as "Confirmed", a flow sends an automatic confirmation email to the customer. This enhances transparency and keeps the customer informed, improving the overall service experience.**

## **Trigger Logic**

Apex triggers were implemented in the HandsMen Threads Salesforce CRM to automate real-time operations that couldn't be handled by declarative tools like flows alone. These triggers ensure data consistency, operational efficiency, and seamless workflow execution.

### **Order Trigger:**

An Apex trigger is configured on the HandsMen Order object. Whenever a new order is inserted or an existing one is updated to “Delivered”, the system calls a handler class that recalculates the customer's total purchase value and updates their loyalty status. This ensures the customer's engagement tier is always up to date in real time.

### **Product Trigger :**

This optional trigger ensures that stock quantity for a product never falls below zero. It can also be extended to automatically sync the product's inventory level with related records, preventing data mismatch and improving inventory accuracy.

## **Batch Job Schedules**

The project includes scheduled Apex batch jobs for nightly processing of data. One job updates inventory records and sends alerts for low stock situations at midnight each day. Another batch job recalculates customer spending totals and ensures that loyalty statuses and financial summaries are up-to-date. These jobs are scheduled using the Apex scheduler and run automatically at defined intervals.

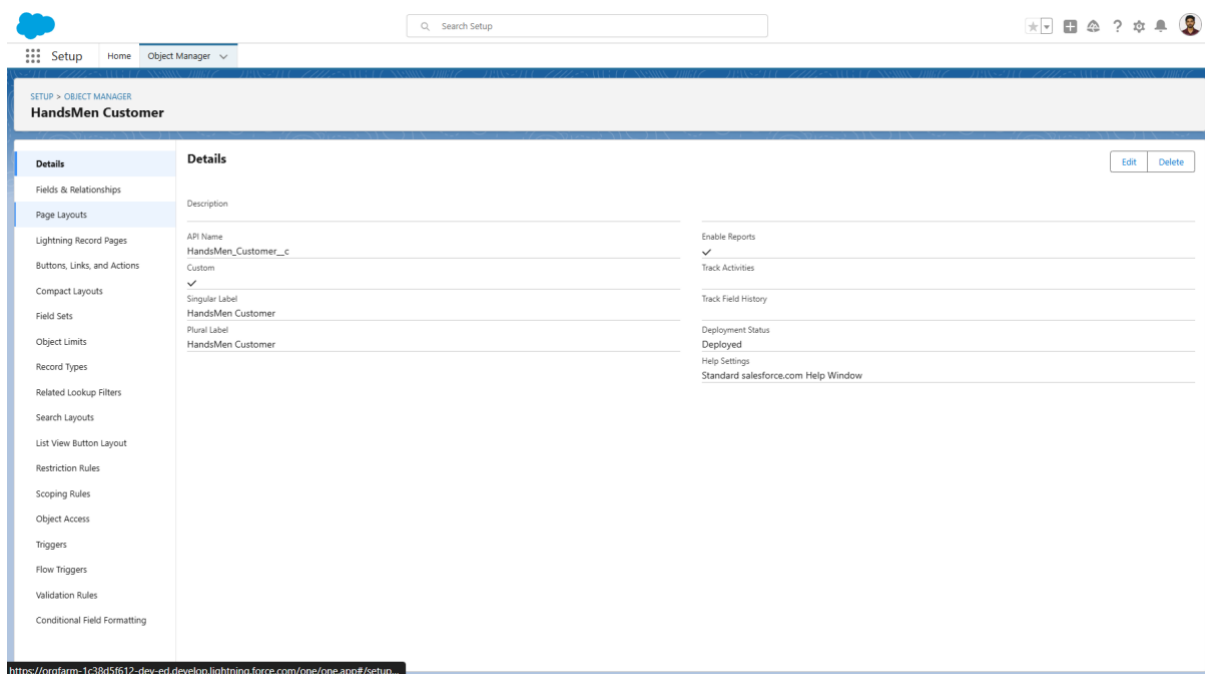
## **Email Alert Strategy**

Email alerts are integrated throughout the system to keep stakeholders informed at every stage. Customers receive confirmation emails after placing orders and can also be notified when their loyalty tier changes. The warehouse team receives alerts when stock is low. Additionally, marketing users can be notified about upcoming campaign start dates. These alerts are triggered either via flows or scheduled processes, ensuring timely communication without manual intervention.

## 5. Data Management - Objects

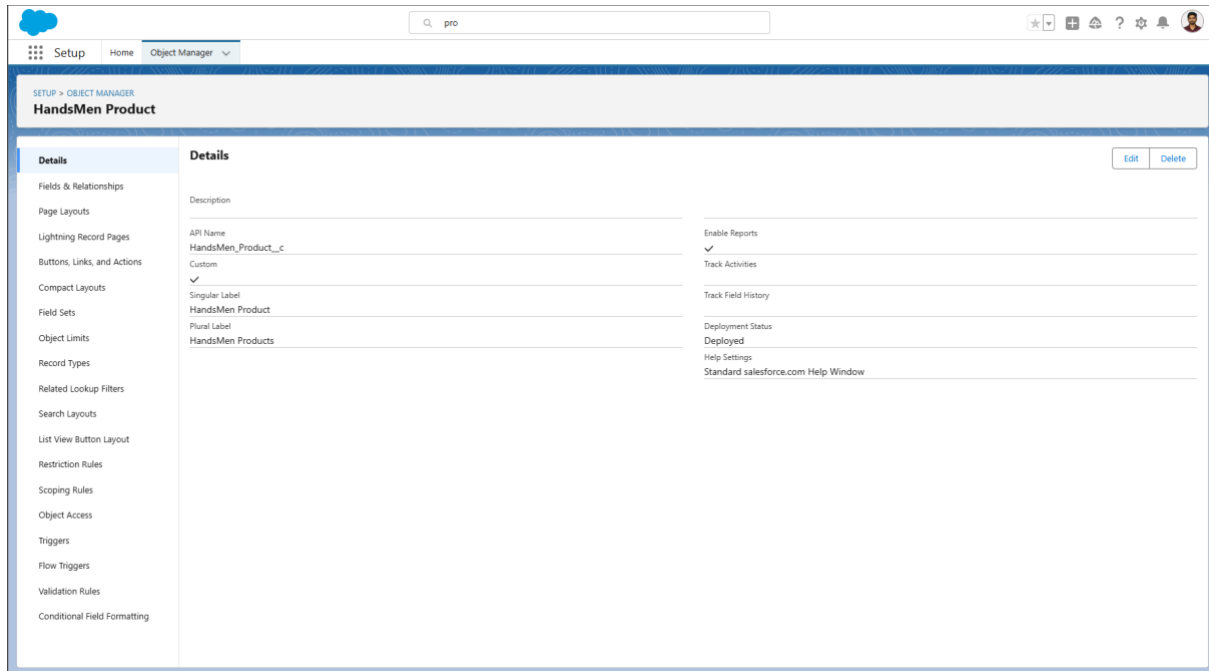
### 5.1 Object - HandsMen Customer:

The HandsMen\_Customer\_\_c object is designed to store detailed information about customers who engage with the HandsMen Threads fashion platform. This object serves as the foundation for all customer-related interactions in the system, supporting features like order history tracking, loyalty management, and personalized marketing.



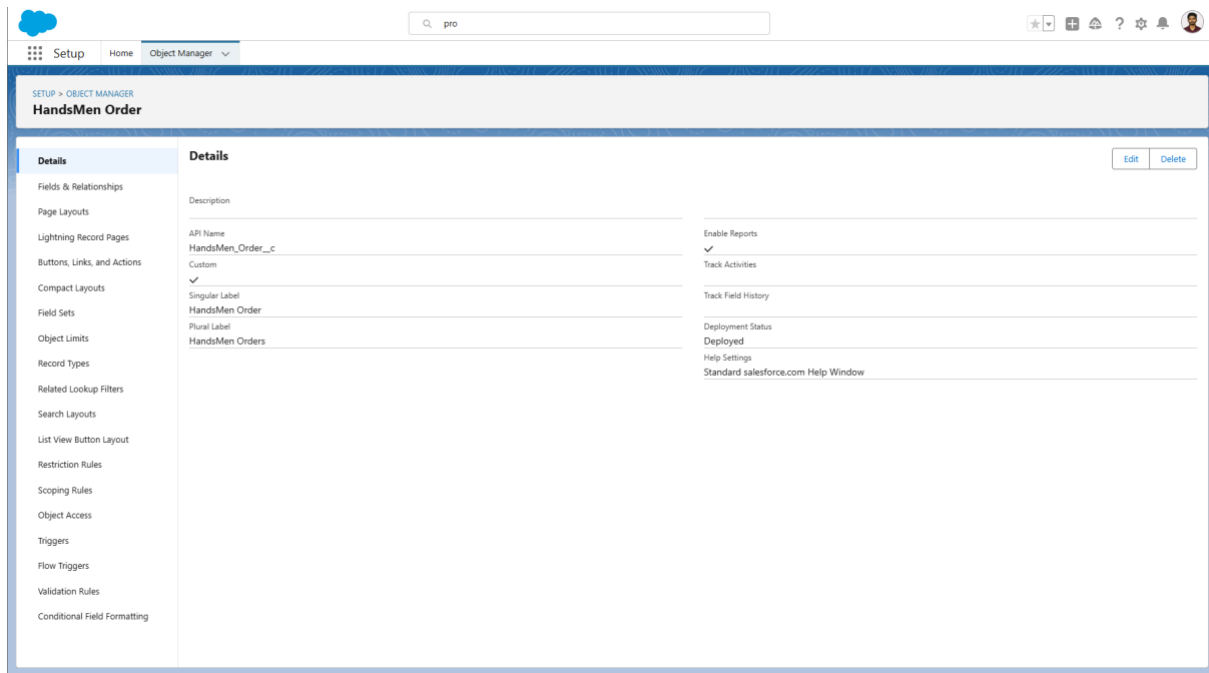
### 5.2 Object - HandsMen Product:-

The HandsMen\_Product\_\_c object represents the catalog of fashion products offered by HandsMen Threads. It is central to managing inventory, pricing, product tracking, and stock-related automations.



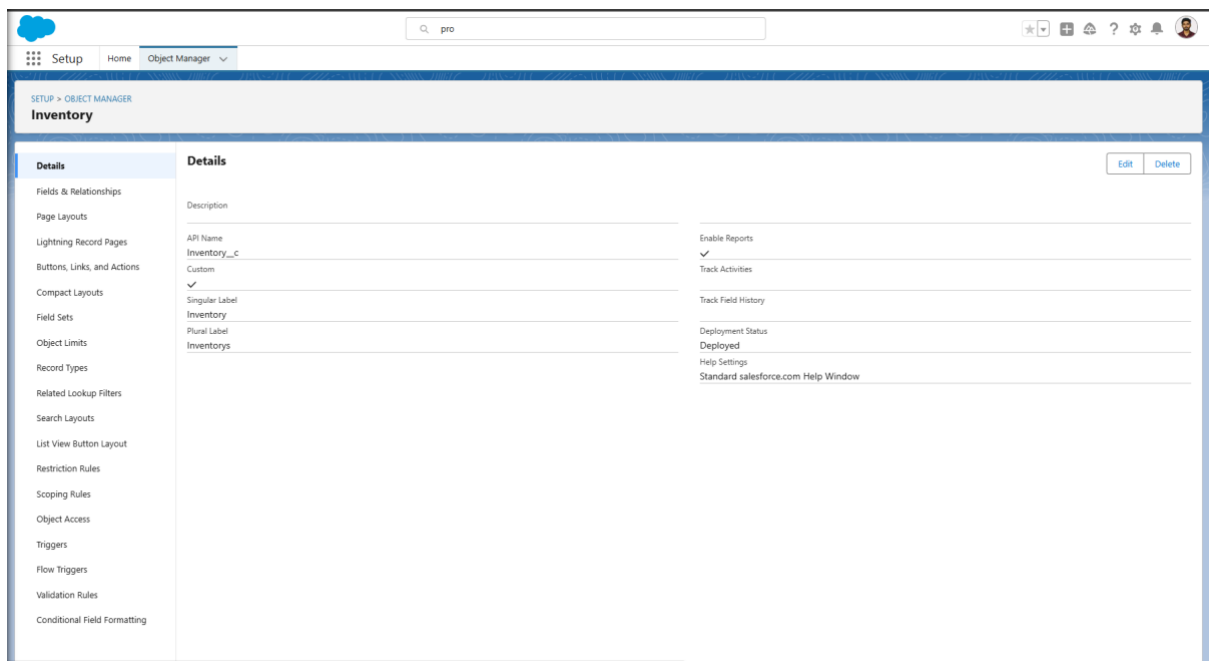
### 5.3 Object - HandsMen Order:-

The HandsMen\_Order\_\_c object is designed to manage all order-related information within the HandsMen Threads fashion CRM system. It acts as the core transactional object that links customers to their purchases and tracks fulfillment, status, and total value.



## 5.4 Object - Inventory :-

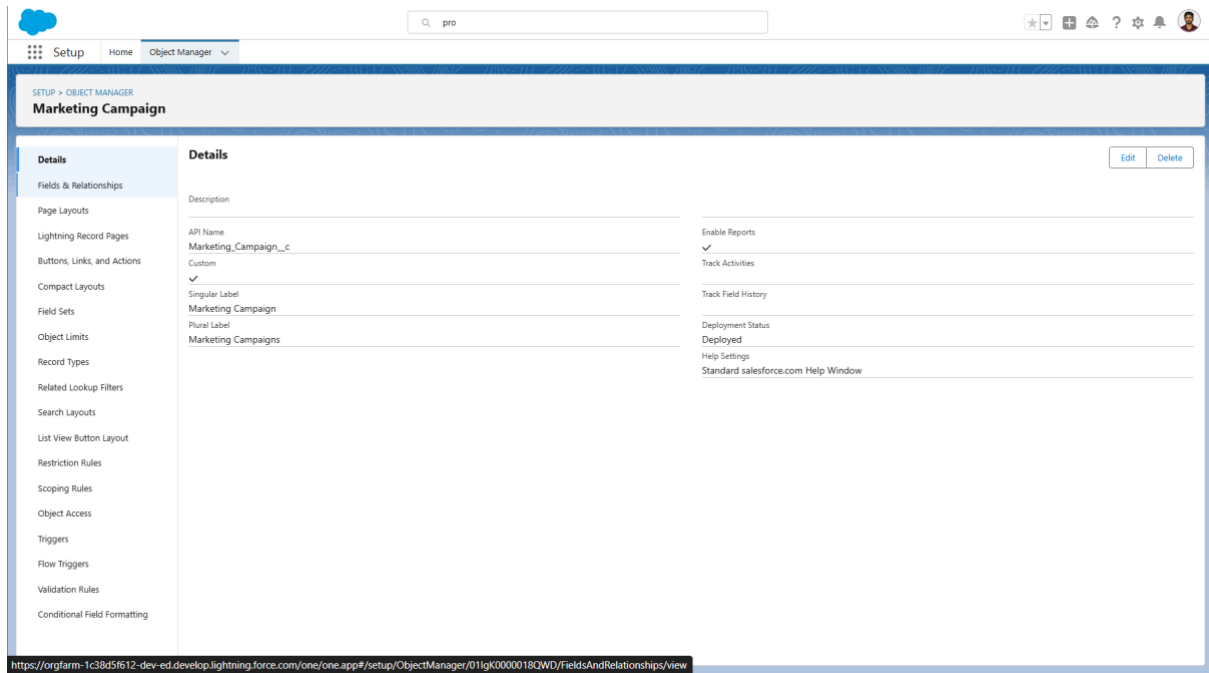
The Inventory\_\_c object is used to manage and track the availability of products across different warehouse locations within the HandsMen Threads platform. It is directly tied to product stock monitoring and supports automation processes like low stock alerts and batch stock updates.





## 5.5 Object - Marketing Campaign:-

The Marketing\_Campaign\_\_c object is designed to track and manage promotional activities and targeted campaigns within the HandsMen Threads Salesforce CRM system. It enables the business to record outreach efforts, analyze campaign performance, and associate campaigns with specific customers.



## 6. Data Management – Fields

Efficient field management was critical to ensure data accuracy, support automation, and enable reporting within the HandsMen Threads CRM system. Each custom object was enriched with standard fields (like Email and Phone), picklists, formulas, and lookup relationships to support business logic and user needs.

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

HandsMen Order

Details

Fields & Relationships

10 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Fields & Relationships

FIELD LABEL

FIELD NAME

DATA TYPE

CONTROLLING FIELD

INDEXED

Page Layouts

Created By

CreatedById

Lookup(User)

Lightning Record Pages

Customer

Customer\_c

Lookup(HandsMen Customer)

Buttons, Links, and Actions

Customer Email

Customer\_Email\_c

Email

Compact Layouts

HandsMen OrderNumber

Name

Auto Number

Field Sets

Last Modified By

LastModifiedById

Lookup(User)

Object Limits

Owner

OwnerId

Lookup(User Group)

Record Types

Postal Code

Postal\_Code\_c

Text(10)

Related Lookup Filters

Quantity

Quantity\_c

Number(10, 0)

Search Layouts

Status

Status\_c

Picklist

List View Button Layout

Total Amount

Total\_Amount\_c

Number(16, 2)

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

HandsMen Customer

Details

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Fields & Relationships

FIELD LABEL

FIELD NAME

DATA TYPE

CONTROLLING FIELD

INDEXED

Page Layouts

Created By

CreatedById

Lookup(User)

Lightning Record Pages

Email

Email\_c

Email

Buttons, Links, and Actions

FirstName

FirstName\_c

Text(40)

Compact Layouts

Full Name

Full\_Name\_c

Formula (Text)

Field Sets

HandsMen Customer Name

Name

Text(80)

Object Limits

Last Modified By

LastModifiedById

Lookup(User)

Record Types

LastName

LastName\_c

Text(40)

Related Lookup Filters

Loyalty Status

Loyalty\_Status\_c

Picklist

Search Layouts

Owner

OwnerId

Lookup(User Group)

List View Button Layout

Phone

Phone\_c

Phone

Restriction Rules

Total Purchases

Total\_Purchases\_c

Number(16, 2)

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

https://orgfam-1c38d5f612-dev-ed.develop.lightning.force.com/one/one.app#/setup...

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

HandsMen Order

Details

Fields & Relationships

10 items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(HandsMen Customer)		✓
Customer Email	Customer_Email__c	Email		
HandsMen OrderNumber	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Postal Code	Postal_Code__c	Text(10)		
Quantity	Quantity__c	Number(10, 0)		
Status	Status__c	Picklist		
Total Amount	Total_Amount__c	Number(16, 2)		

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

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

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Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Inventory

Details

Fields & Relationships

7 items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Inventory Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Product	Product__c	Master-Detail(HandsMen Product)		✓
Stock Quantity	Stock_Quantity__c	Number(5, 0)		
Stock Status	Stock_Status__c	Formula (Text)		
Warehouse	Warehouse__c	Text(50)		

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

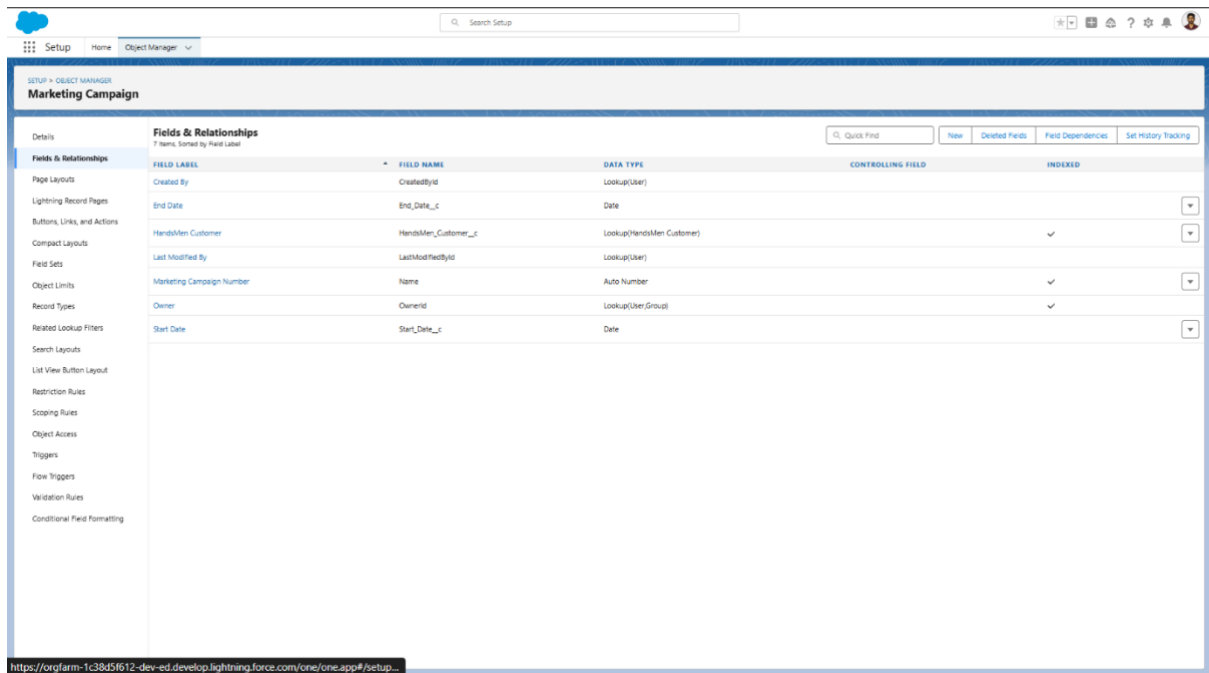
Triggers

Flow Triggers

Validation Rules

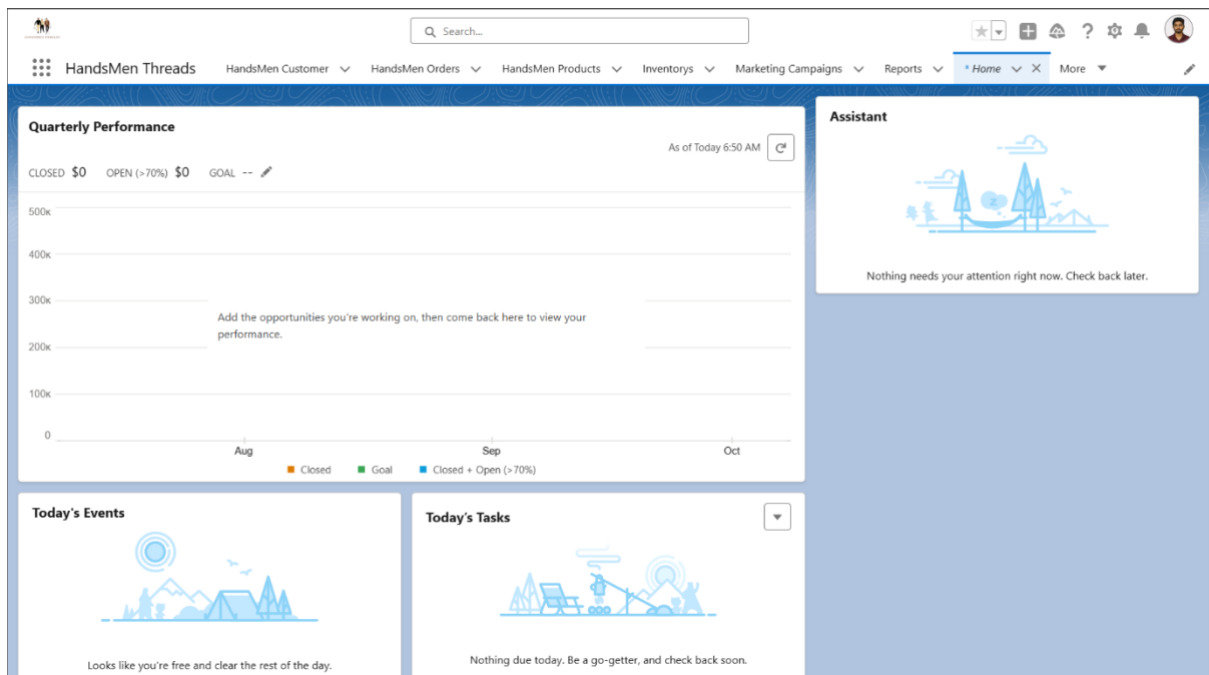
Conditional Field Formatting

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## 7. Data Management - Tabs

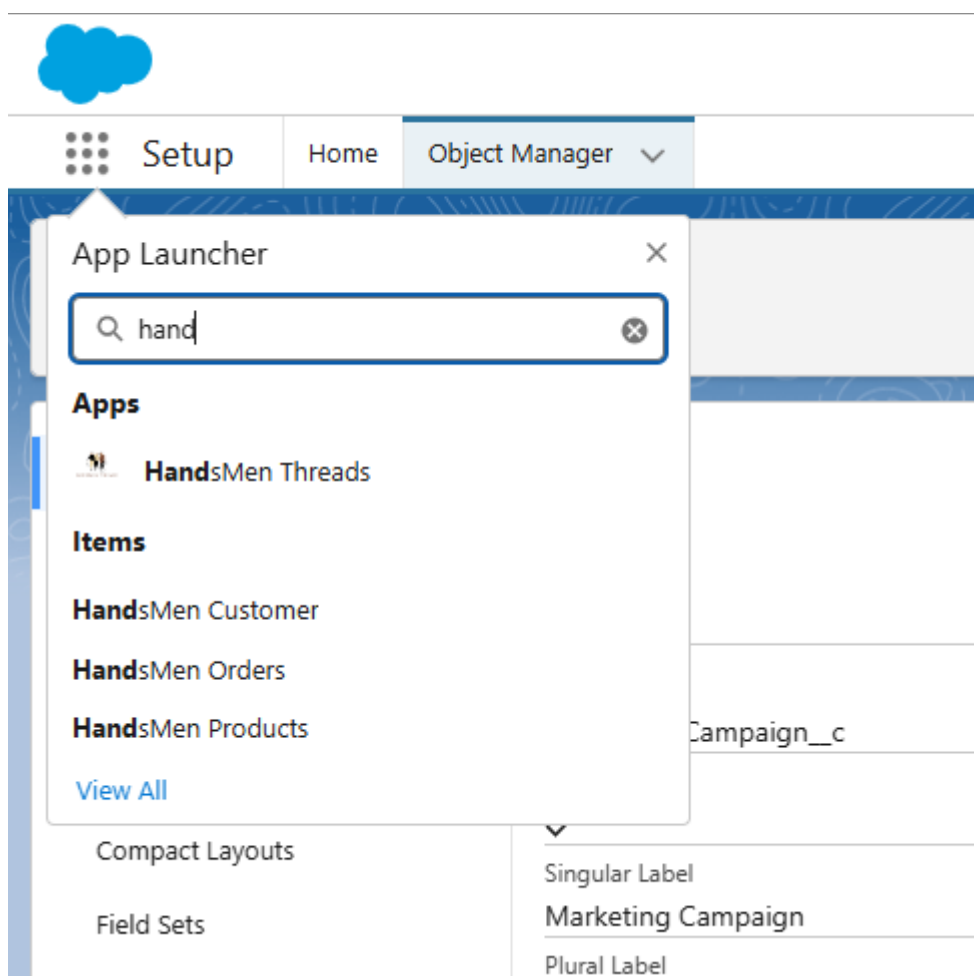
Tabs in Salesforce provide easy navigation and access to custom objects and data. For the HandsMen Threads CRM system, custom tabs were created for each key object to allow users to view, create, and manage records directly from the user interface.



## 8. Data Management - App Manager

### App - HandsMen Threads

As part of the Salesforce implementation for the HandsMen Threads project, a custom Lightning App named “HandsMen Threads” was created using the App Manager. This app centralizes all business objects, workflows, and dashboards into one streamlined workspace, allowing users to manage customers, orders, products, inventory, and marketing from a single interface.



## 9.Data Configuration

Validation Rules were created to ensure the accuracy, completeness, and integrity of data entered into the system. These rules enforce business logic at the field level and prevent users from saving invalid or incomplete records.

### 9.1Validation Rules

The screenshot displays the Salesforce Setup interface for configuring a validation rule. The top navigation bar includes the Setup icon, a search bar, and user profile information. The left sidebar lists various setup categories, with 'Object Manager' selected. The main content area shows the 'HandsMen Order Validation Rule' configuration page. The rule is named 'Postal\_Code\_Validation' and is currently active. The error condition formula is 'NOT(REGEX(Postal\_Code\_\_c, "[0-9]{6}\$"))', which checks if the postal code does not match a 6-digit numeric pattern. The error message is 'Please enter a valid 6-digit numeric Postal Code', and the error location is set to 'Postal Code'. The rule was created and modified by 'Rajesh.Ganta' on 7/7/2025 at 11:59 PM. The page also includes a 'Help for this Page' link.

Setup > OBJECT MANAGER  
**HandsMen Order**

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

### HandsMen Order Validation Rule

[Back to HandsMen Order](#)

**Validation Rule Detail** [Edit](#) [Clone](#)

Rule Name	Postal_Code_Validation	Active	<input checked="" type="checkbox"/>
Error Condition Formula	NOT(REGEX(Postal_Code__c, "[0-9]{6}\$"))		
Error Message	"Please enter a valid 6-digit numeric Postal Code"	Error Location	Postal Code
Description			
Created By	Rajesh.Ganta, 7/7/2025, 11:59 PM	Modified By	Rajesh.Ganta, 7/7/2025, 11:59 PM

[Edit](#) [Clone](#)

[Help for this Page](#)

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

Notifications

User

SETUP > OBJECT MANAGER

HandsMen Order

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

HandsMen Order Validation Rule

[Back to HandsMen Order](#)

Help for this Page

Validation Rule Detail

Edit

Clone

Rule Name

Total\_Amount

Active

✓

Error Condition Formula

Total\_Amount\_\_c <= 0

Error Message

"Please Enter Correct Amount"

Error Location

Total Amount

Description

HandsMen Order Validation Rule - Salesforce - Developer Edition

Created By

Rajesh Ganta, 7/7/2025, 11:42 PM

Modified By

Rajesh Ganta, 7/7/2025, 11:42 PM

Edit

Clone

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

Notifications

User

SETUP > OBJECT MANAGER

Inventory

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

Inventory Validation Rule

[Back to Inventory](#)

Help for this Page

Validation Rule Detail

Edit

Clone

Rule Name

Stock\_Quantity

Active

✓

Error Condition Formula

Stock\_Quantity\_\_c <= 0

Error Message

The inventory count is never less than zero.

Error Location

Top of Page

Description

Created By

Rajesh Ganta, 7/6/2025, 12:02 AM

Modified By

Rajesh Ganta, 7/6/2025, 12:02 AM

Edit

Clone





## 10. Data security – Profiles

Profiles in Salesforce control the level of access users have to objects, fields, tabs, and other platform features. For the HandsMen Threads CRM project, custom profiles were created to reflect different roles within the organization.

This ensures users only see and interact with the data relevant to their responsibilities.

### Profile – Sales

The screenshot shows the Salesforce Setup interface for the 'Platform 1' profile. The left sidebar contains a navigation menu with categories like Users, Profiles, Data, Feature Settings, Marketing, and Sales. The main content area displays the profile details and page layouts.

**Profile: Platform 1**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

**Profile Detail**

Name	Platform 1	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Rajesh Ganta	Modified By	Rajesh Ganta
	7/6/2025, 12:06 AM		7/9/2025, 5:47 AM

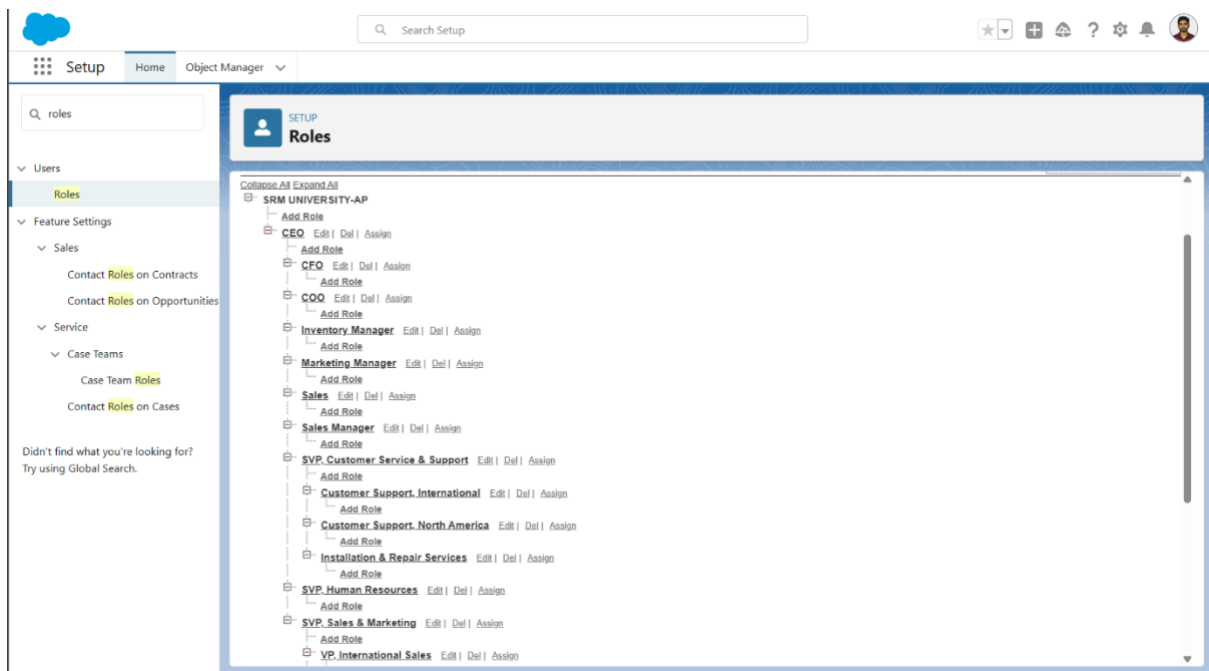
**Page Layouts**

Standard Object Layouts	Global	Location Group
Global	Global Layout [View Assignment]	Location Group Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location Group Assignment Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Macro [View Assignment]
Account	Account Layout [View Assignment]	Object Milestone Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Operating Hours [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity [View Assignment]
Asset	Asset Layout [View Assignment]	Opportunity Product [View Assignment]
Asset Action	Asset Action Layout	Order [View Assignment]

# 11. Data Security – Roles

Roles in Salesforce determine record-level access by controlling who can view, edit, or share records owned by other users in the hierarchy. For the HandsMen Threads CRM, roles were created to align with different departments like Sales, Inventory, Marketing, and Administration.

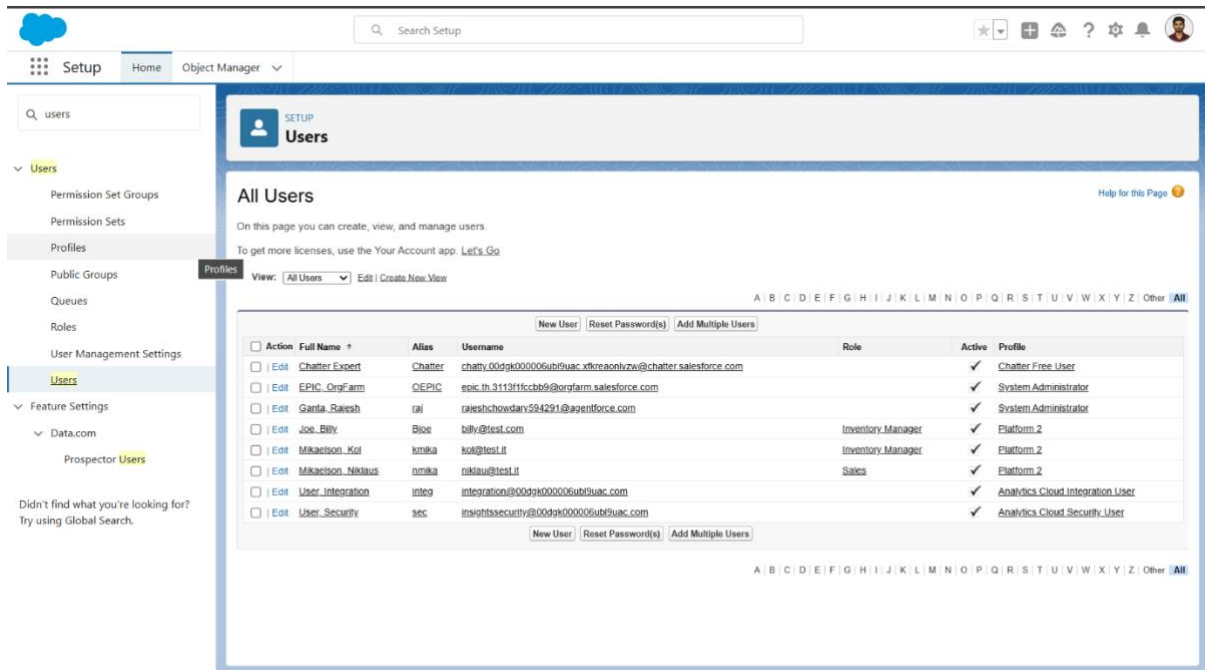
## Role - Sales



## 12.Data Security – Users

**In Salesforce, Users are individual accounts that represent real employees or team members accessing the CRM. Each user is assigned a Profile (for object-level permissions) and a Role (for record-level access). Creating well-defined users helps implement a secure, organized, and functional CRM system.**

### Users



**Users**

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

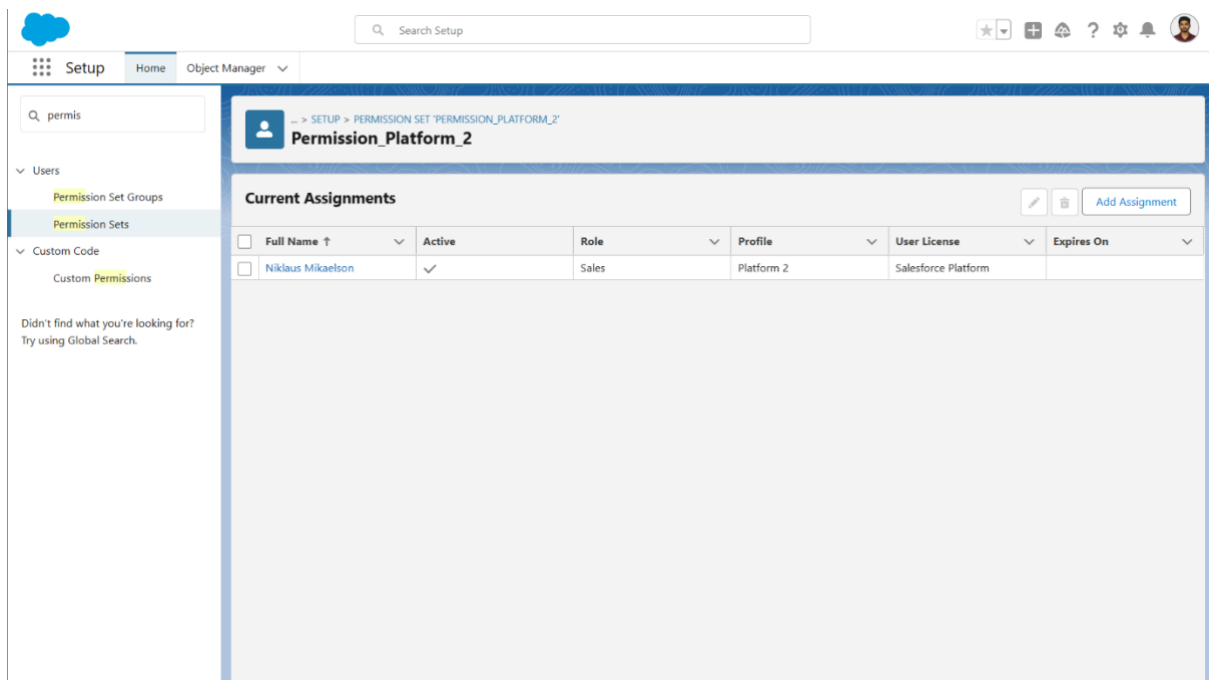
To get more licenses, use the Your Account app. Let's Go

View: All Users | Edit | Create New User

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty.00d9k0000006ubt9uac.xtreaonlvzw@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit	EPIC_OrgFarm	OEPIIC	epic.th.3113f1fccbb9@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	Ganta_Raresh	rai	rareshchowdary594291@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	Joe_Billy	Bjoe	bjlv@test.com	Inventory Manager	<input checked="" type="checkbox"/>	Platform 2
<input type="checkbox"/>   Edit	Mikaelson_Kol	kmika	kol@test.it	Inventory Manager	<input checked="" type="checkbox"/>	Platform 2
<input type="checkbox"/>   Edit	Mikaelson_Niklaus	nmika	niklaus@test.it	Sales	<input checked="" type="checkbox"/>	Platform 2
<input type="checkbox"/>   Edit	User_Integration	integ	integration@00d9p0000006ubt9uac		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@00d9k0000006ubt9uac		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## 13. Data Security - Permission Set

**Permission Sets in Salesforce allow administrators to grant additional permissions to users without changing their profile. This is useful for providing flexible and scalable access to specific objects, fields, or functionalities that go beyond the default profile setup.**



Search Setup

Setup Home Object Manager

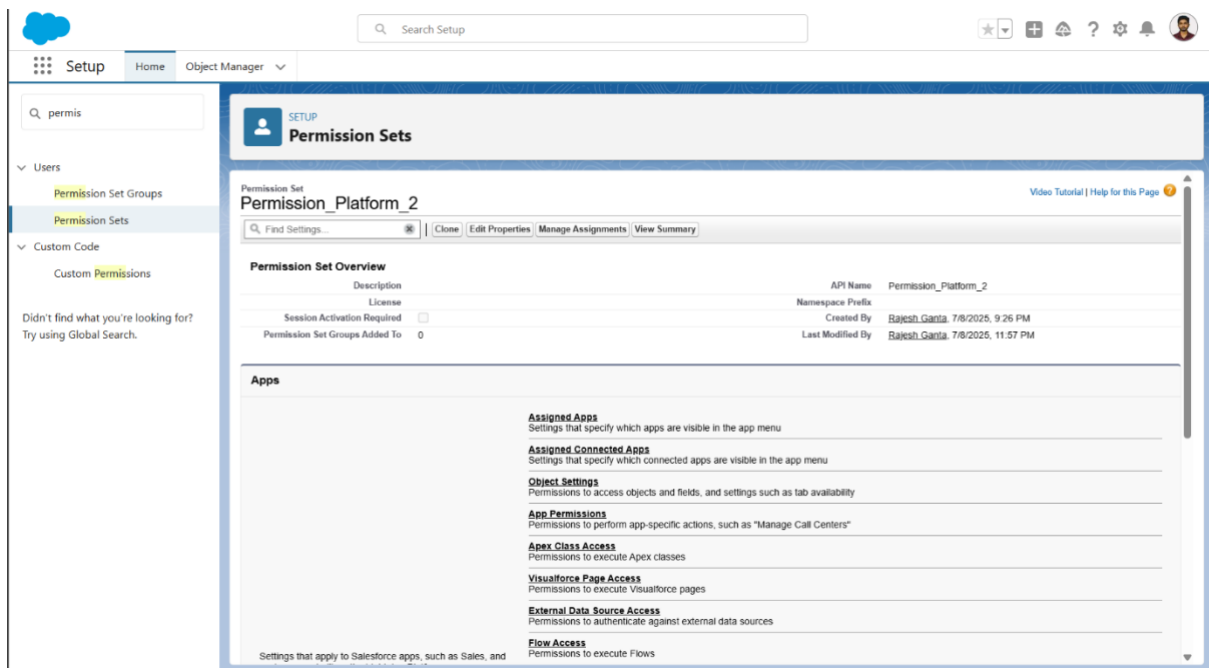
Search Setup

Permission Platform\_2

Current Assignments

<input type="checkbox"/>	Full Name ↑	Active	Role	Profile	User License	Expires On
<input type="checkbox"/>	Niklaus Mikaelson	✓	Sales	Platform 2	Salesforce Platform	

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



Search Setup

Setup Home Object Manager

Search Setup

Permission Sets

Permission Set Overview

Permission Platform\_2

Find Settings... Clone Edit Properties Manage Assignments View Summary

API Name: Permission\_Platform\_2

Namespace Prefix:

Created By: Rajesh Ganta, 7/8/2025, 9:26 PM

Last Modified By: Rajesh Ganta, 7/8/2025, 11:57 PM

Assigned Apps

Assigned Connected Apps

Object Settings

App Permissions

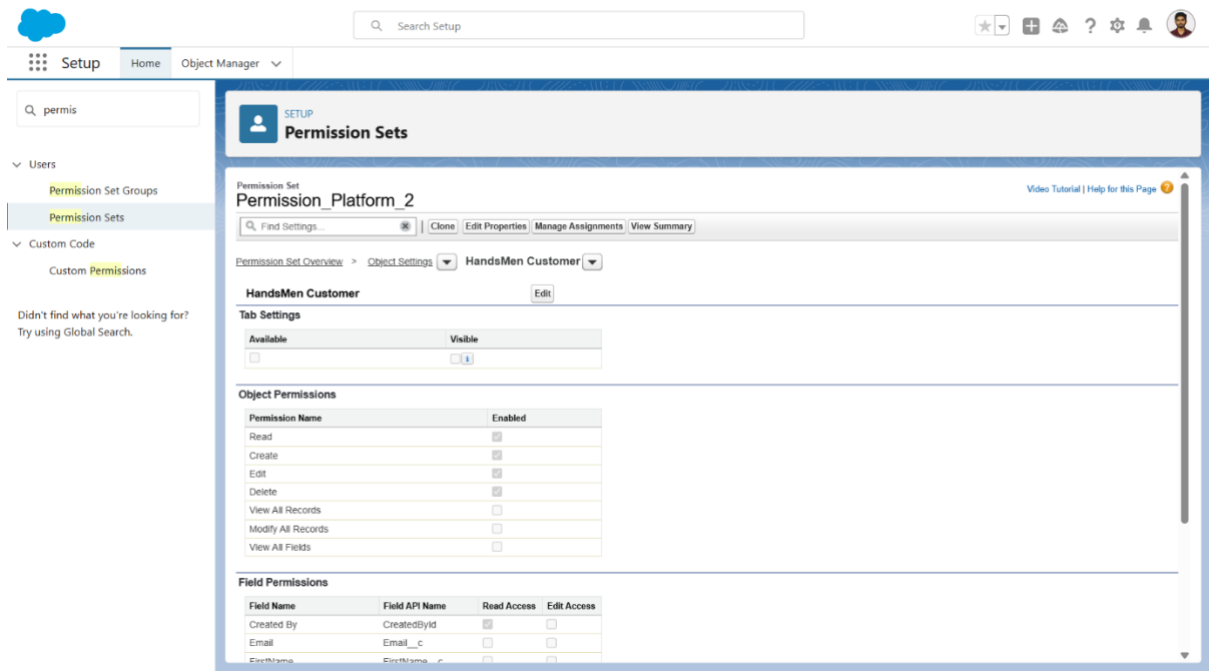
Apex Class Access

Visualforce Page Access

External Data Source Access

Flow Access

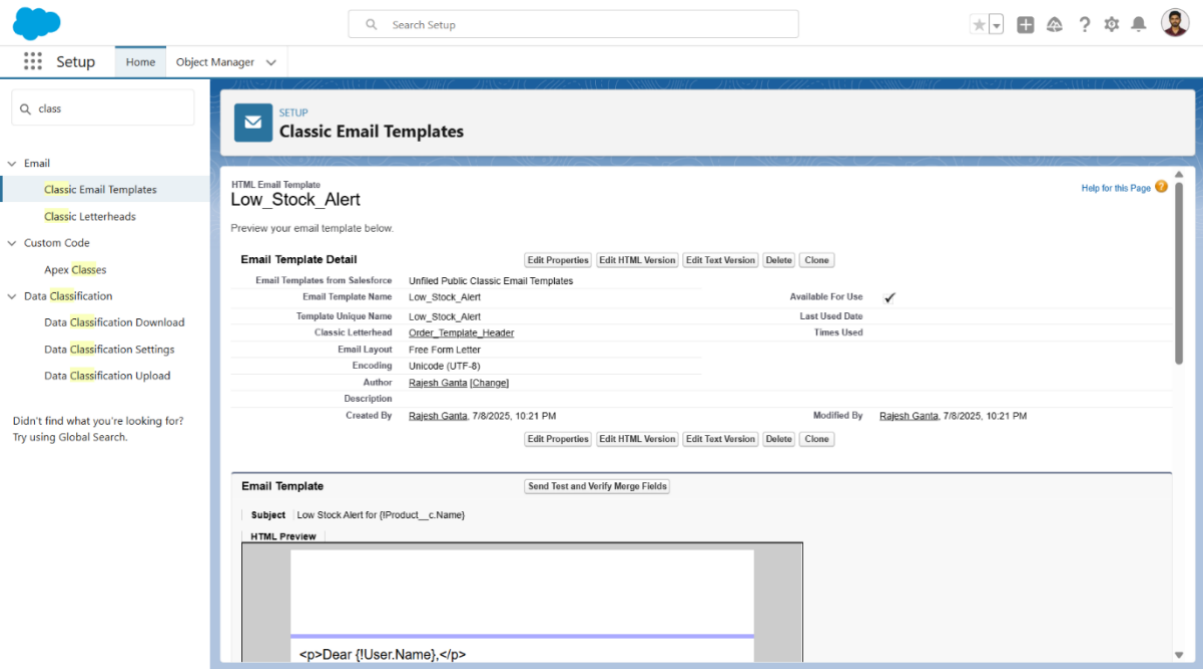
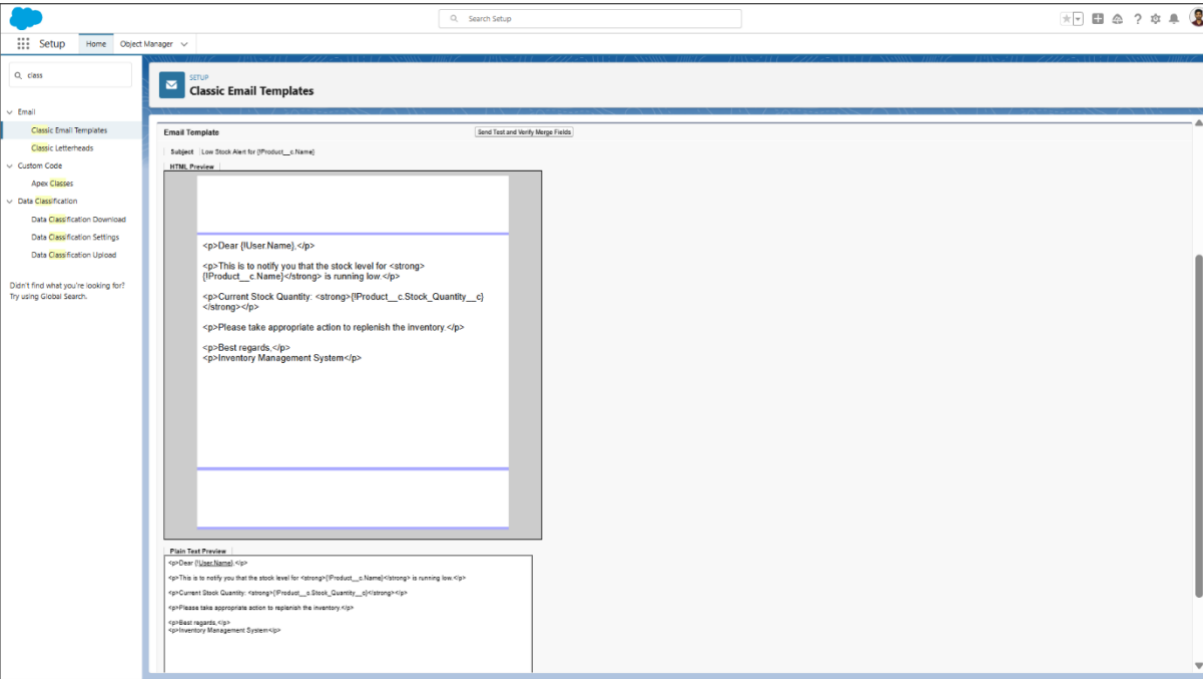
Settings that apply to Salesforce apps, such as Sales, and



## 14. Email Template

Email templates in Salesforce are used to send automated, professional messages to customers and internal teams during key CRM events. For the HandsMen Threads CRM, email templates were created to support core automations such as order confirmations, stock alerts, and campaign updates.

# 14.1 Create an Email Template



Setup

Home

Object Manager

Q

Search Setup

Help for this Page

Q class

Email

Classic Email Templates

Classic Letterheads

Custom Code

Apex Classes

Data Classification

Data Classification Download

Data Classification Settings

Data Classification Upload

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

SETUP

Classic Email Templates

HTML Email Template

Order\_Confirmation\_Email

Preview your email template below:

Email Template Detail

Email Templates from Salesforce

Unified Public Classic Email Templates

Email Template Name

Order\_Confirmation\_Email

Available For Use

✓

Template Unique Name

Order\_Confirmation\_Email

Last Used Date

Classic Letterhead

Order\_Template\_Header

Times Used

Email Layout

Free From Letter

Encoding

Unicode (UTF-8)

Author

Rakesh Ganta (Change)

Description

Created By

Rakesh Ganta

7/6/2025, 10:11 PM

Modified By

Rakesh Ganta

7/6/2025, 10:11 PM

Edit Properties

Edit HTML Version

Edit Text Version

Delete

Clone

Email Template

Send Text and Verify Merge Fields

Subject

Your Order has been Confirmed!

HTML Preview

HTML Email Template: Order\_Confirmation\_Email – Salesforce – Developer Edition

<p>Dear {!Order\_\_c.Customer\_\_c}</p>  
<p>Your order #{!Order\_\_c.Name} has been confirmed!</p>  
<p>Thank you for shopping with us.</p>  
<p>Best Regards,</p>  
<p>Sales Team</p>

javascriptsrcUp(%27%2F00Xgk000003J06%3FsetupId%3DCommunicationTemplatesEmail%26idp%3Dp1%27)

Setup

Home

Object Manager

Q

Search Setup

Help for this Page

Q class

Email

Classic Email Templates

Classic Letterheads

Custom Code

Apex Classes

Data Classification

Data Classification Download

Data Classification Settings

Data Classification Upload

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

SETUP

Classic Email Templates

HTML Email Template

Order\_Confirmation\_Email

Preview your email template below:

Email Template Detail

Email Templates from Salesforce

Unified Public Classic Email Templates

Email Template Name

Order\_Confirmation\_Email

Available For Use

✓

Template Unique Name

Order\_Confirmation\_Email

Last Used Date

Classic Letterhead

Order\_Template\_Header

Times Used

Email Layout

Free From Letter

Encoding

Unicode (UTF-8)

Author

Rakesh Ganta (Change)

Description

Created By

Rakesh Ganta

7/6/2025, 10:11 PM

Modified By

Rakesh Ganta

7/6/2025, 10:11 PM

Edit Properties

Edit HTML Version

Edit Text Version

Delete

Clone

Email Template

Send Text and Verify Merge Fields

Subject

Your Order has been Confirmed!

HTML Preview

HTML Email Template: Order\_Confirmation\_Email – Salesforce – Developer Edition

<p>Dear {!Order\_\_c.Customer\_\_c}</p>  
<p>Your order #{!Order\_\_c.Name} has been confirmed!</p>  
<p>Thank you for shopping with us.</p>  
<p>Best Regards,</p>  
<p>Sales Team</p>

Plain Text Preview

<p>Dear {!Order\_\_c.Customer\_\_c}</p>  
<p>Your order #{!Order\_\_c.Name} has been confirmed!</p>  
<p>Thank you for shopping with us.</p>  
<p>Best Regards,</p>  
<p>Sales Team</p>

The image displays two screenshots of the Salesforce Classic Email Templates interface. The top screenshot shows the 'Email Template Detail' for 'Loyalty\_Program\_Email'. The interface includes a sidebar with navigation options like 'Setup', 'Home', and 'Object Manager'. The main content area shows the template details, including the 'Email Template Name', 'Template Unique Name', 'Classic Letterhead', 'Email Layout', 'Encoding', 'Author', and 'Description'. It also features a table for 'Email Templates from Salesforce' and a 'Send Text and Verify Merge Fields' button. The bottom screenshot shows the 'HTML Preview' and 'Plain Text Preview' of the email template content. The HTML preview shows a subject line, a greeting, a welcome message, a list of benefits (Special Discounts, Early Access, Birthday Surprises), a call to action to join the loyalty program, and a sign-off from the Customer Experience Team. The plain text preview shows the same content in a simplified format.

## 14.2 Create an Email Alert



Setup

Home

Object Manager

Search Setup

Setup

Home

Object Manager

Q email a

Email

Email Address Internationalization

Email Attachments

Process Automation

Workflow Actions

Email Alerts

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

SETUP

Email Alerts

Email Alert

Order Confirmation Email Alert

Rules Using This Email Alert | Approval Processes Using This Email Alert | Entitlement Processes Using This Email Alert

Email Alert Detail

Description

Order Confirmation Email Alert

Edit

Delete

Close

Unique Name

Order\_Confirmation\_Email\_Alert

Email Template

Order Confirmation Email

From Email Address

Current User's email address

Object

Handwritten Order

Recipients

Email Field: Customer Email

Additional Emails

Created By

Rajesh Ganta, 7/6/2025, 12:34 AM

Modified By

Rajesh Ganta, 7/9/2025, 12:34 AM

Email Alert : Order Confirmation Email Alert - Salesforce - Developer Edition

Rules Using This Email Alert

This alert is currently not used by any rules

Rules Using This Email Alert Help

Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

Approval Processes Using This Email Alert Help

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
Order Confirmation Flow	1		01gh0000018Pzc	✓

Back To Top

Always show me more records per related list

Setup

Home

Object Manager

Search Setup

Setup

Home

Object Manager

Q email a

Email

Email Address Internationalization

Email Attachments

Process Automation

Workflow Actions

Email Alerts

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

SETUP

Email Alerts

Email Alert

Low Stock Alert

Rules Using This Email Alert | Approval Processes Using This Email Alert | Entitlement Processes Using This Email Alert

Email Alert Detail

Description

Low Stock Alert

Edit

Delete

Close

Unique Name

Low\_Stock\_Alert

Email Template

Low Stock Alert

From Email Address

Current User's email address

Object

Inventory

Recipients

Role: Inventory Manager

Additional Emails

Created By

Rajesh Ganta, 7/6/2025, 12:52 AM

Modified By

Rajesh Ganta, 7/9/2025, 12:52 AM

Low Stock Alert

Rules Using This Email Alert

This alert is currently not used by any rules

Rules Using This Email Alert Help

Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

Approval Processes Using This Email Alert Help

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
Stock Alert Flow	1		01gh0000018C26	✓

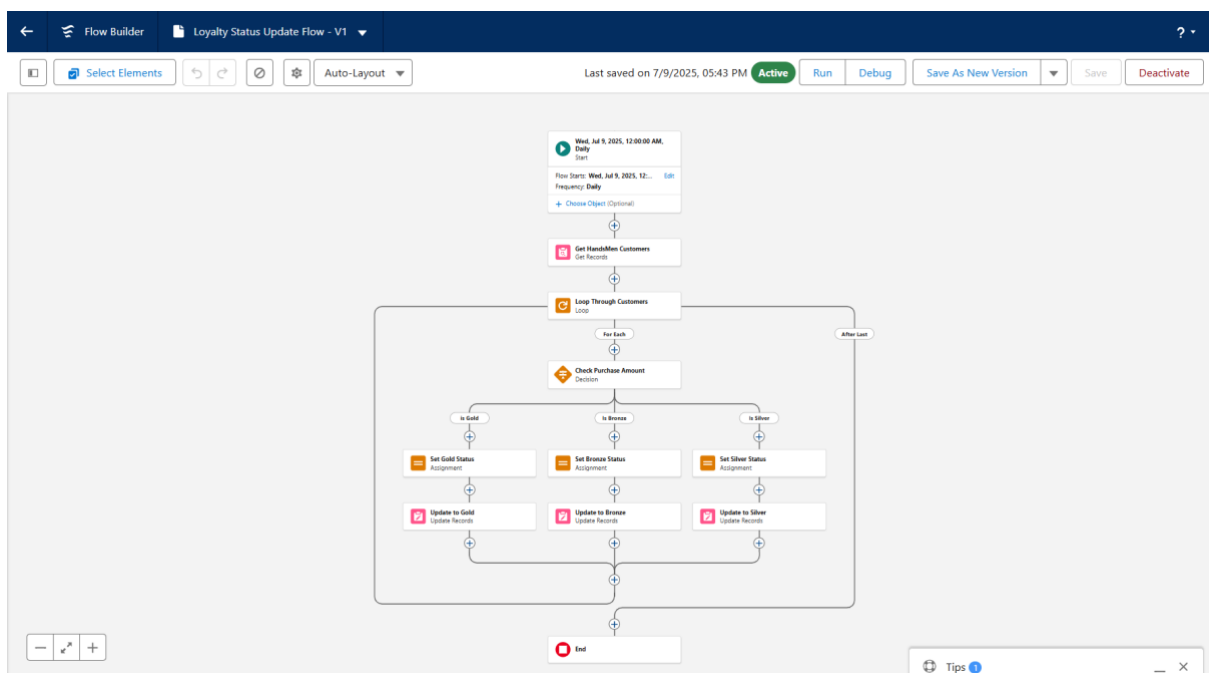
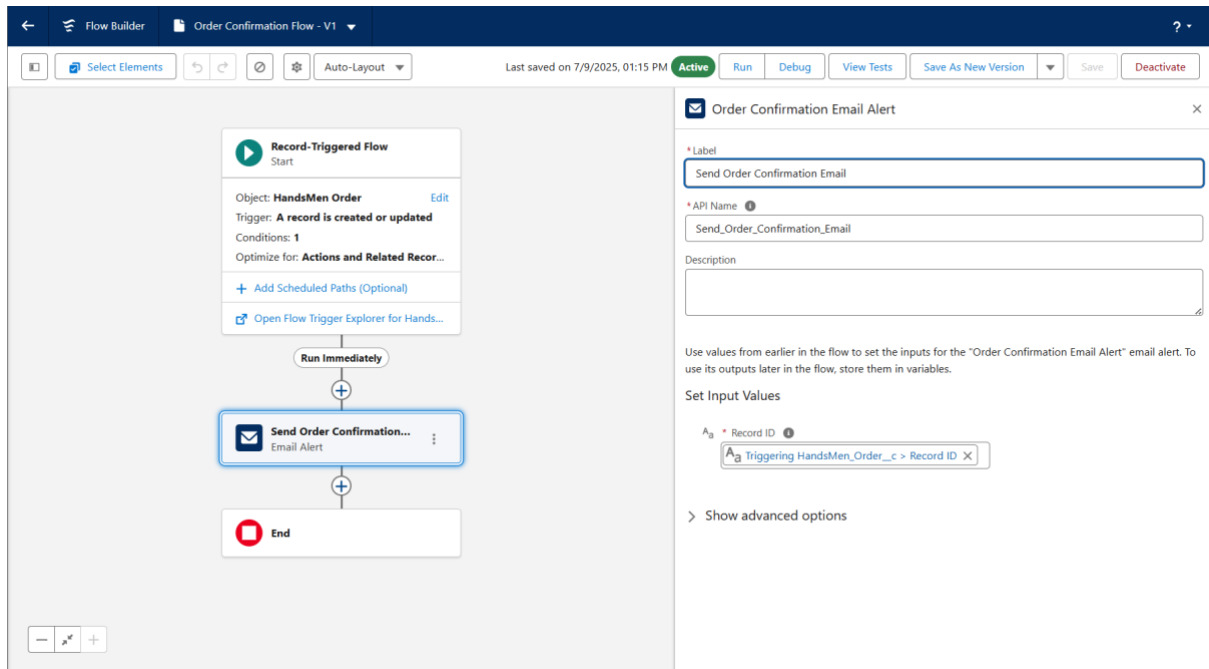
Back To Top

Always show me more records per related list

javascriptsrcUp%27%2F01WgK000004M%3Fsdtp%3Dp1%27,

## 15. Flows

Flows in Salesforce are powerful no-code/low-code automation tools that allow teams to implement complex logic, data updates, and notifications. In the HandsMen Threads CRM system, flows were designed to automate tasks such as order confirmations, loyalty updates, stock alerts, and batch updates — all without user intervention.



Flow Builder

Stock Alert Flow - V1

←

⌵

?

Select Elements

↶

↷

⌵

⚙

Auto-Layout

Last saved on 7/9/2025, 01:29 PM

Active

Run

Debug

View Tests

Save As New Version

Save

Deactivate

Record-Triggered Flow

Start

Object: **Inventory**

Trigger: **A record is created or updated**

Conditions: **1**

Optimize for: **Actions and Related Recor...**

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Invent...

Run Immediately

Send Stock Alert Email

Email Alert

End

Low Stock Alert

×

\* Label

Send Stock Alert Email

\* API Name ⓘ

Send\_Stock\_Alert\_Email

Description

Use values from earlier in the flow to set the inputs for the "Low Stock Alert" email alert. To use its outputs later in the flow, store them in variables.

Set Input Values

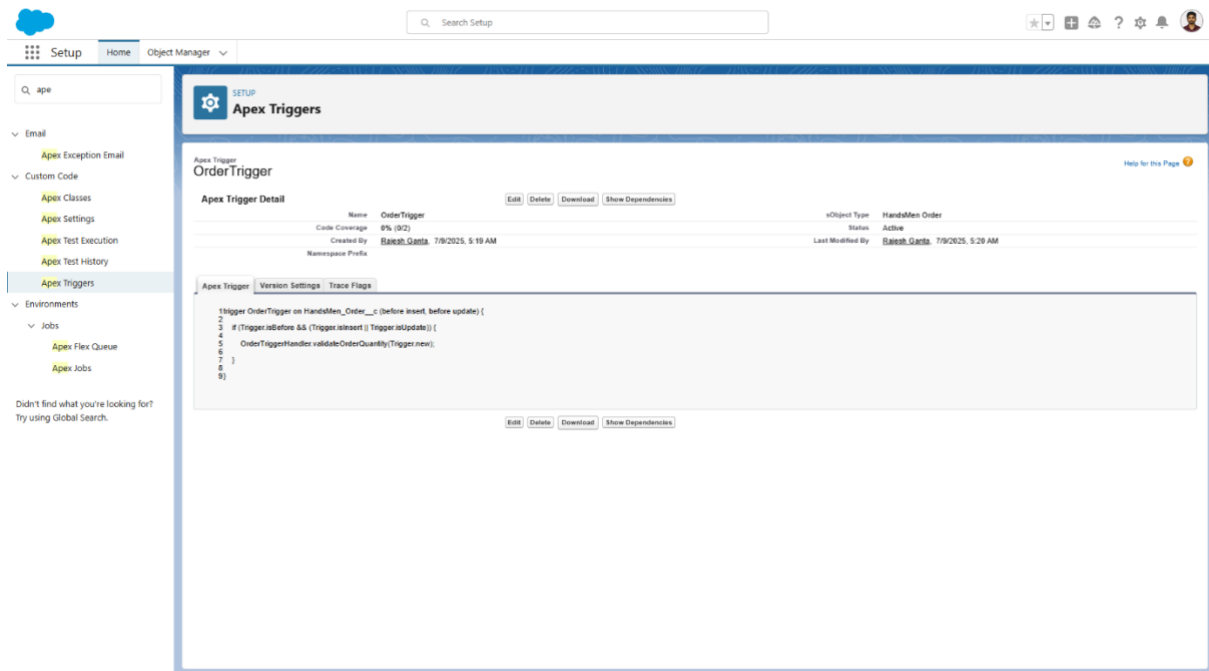
A ⓘ \* Record ID ⓘ

A Triggering Inventory\_c > Record ID X

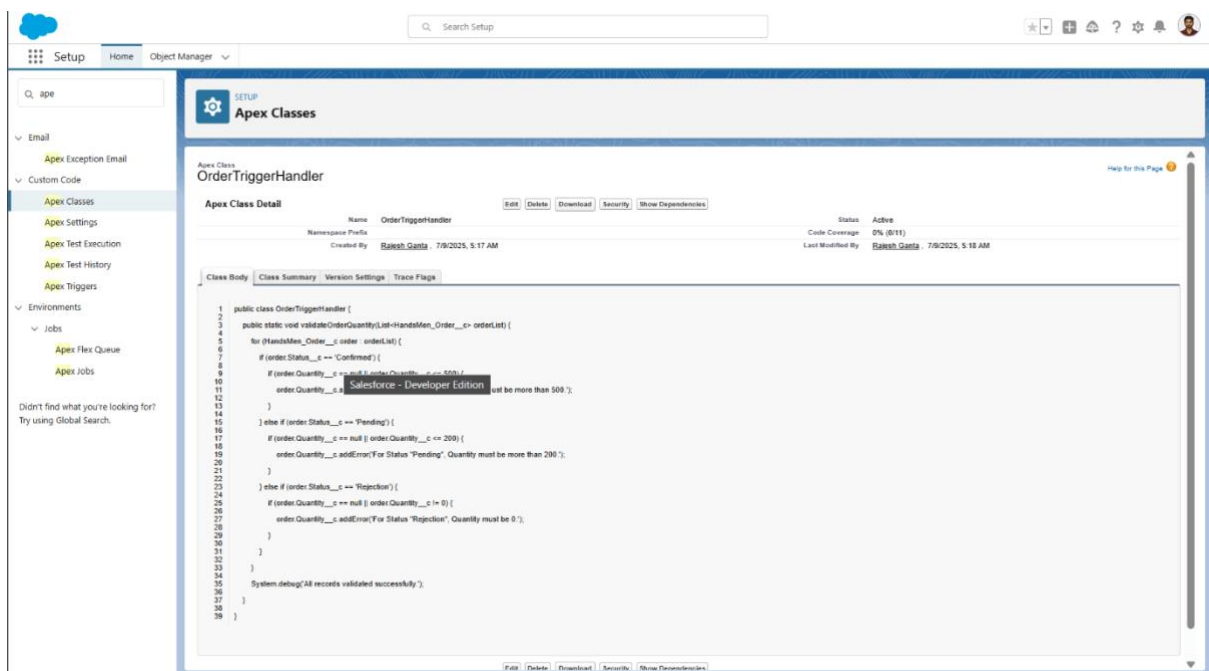
> Show advanced options

## 16. Automation using Apex

Apex code enables advanced automation and customization in Salesforce beyond what flows and process builders can handle. In the HandsMen Threads CRM system, Apex Triggers and Classes were developed to implement custom logic, especially for order management, inventory control, and loyalty updates.



The screenshot shows the Salesforce Setup interface for Apex Triggers. The left sidebar contains a navigation menu with options like Email, Custom Code, Apex Classes, Apex Settings, Apex Test Execution, Apex Test History, Apex Triggers, Environments, Jobs, Apex Flex Queue, and Apex Jobs. The main content area is titled "Apex Triggers" and displays details for a trigger named "OrderTrigger". The trigger is associated with the "OrderTrigger" object and is in an "Active" status. The code for the trigger is shown in a text editor, featuring a trigger on the "OrderTrigger" object that calls the "OrderTriggerHandler" class. The interface includes a search bar at the top and a "Help for this Page" link.



The screenshot shows the Salesforce Setup interface for Apex Classes. The left sidebar contains a navigation menu with options like Email, Custom Code, Apex Classes, Apex Settings, Apex Test Execution, Apex Test History, Apex Triggers, Environments, Jobs, Apex Flex Queue, and Apex Jobs. The main content area is titled "Apex Classes" and displays details for a class named "OrderTriggerHandler". The class is in an "Active" status and has a code coverage of 0%. The code for the class is shown in a text editor, featuring a public class "OrderTriggerHandler" with a static method "validateOrderQuantity" that checks the quantity of an order against a limit of 500. The interface includes a search bar at the top and a "Help for this Page" link.

## 17. Batch jobs

Batch Apex in Salesforce is used for handling large volumes of data asynchronously. In the HandsMen Threads CRM, batch jobs were implemented to automate nightly updates, stock recalculations, and loyalty segmentation without impacting system performance.

SETUP

Scheduled Jobs

All Scheduled Jobs

Help for this Page

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

Percentage of Scheduled Jobs Used: 1%  
You have currently used 1 scheduled Apex jobs out of an allowed organization limit of 100 active or scheduled jobs. To learn about how this limit is calculated and what contributes to it see the [Limits and Quotas](#) topic.

View: All Scheduled Jobs [Create New View](#)

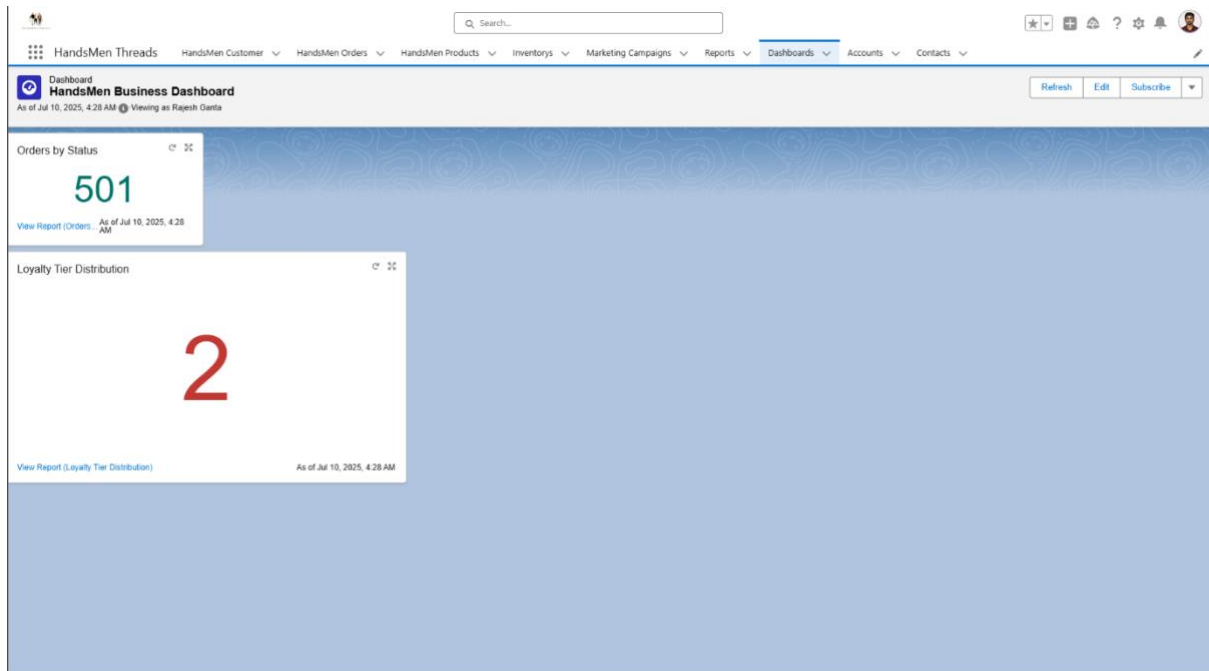
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type	Cron Trigger ID
<a href="#">Manage</a>   <a href="#">Del</a>   <a href="#">Pause Job</a>	Daily Inventory Sync	Ganta_Rajesh	7/9/2025, 6:19 AM	7/10/2025, 12:01 AM	7/11/2025, 12:00 AM	Scheduled Apex	08egK000006ybSj
<a href="#">Del</a>	Loyalty_Status_Update_Flow-1	Ganta_Rajesh	7/9/2025, 5:13 AM	7/10/2025, 12:02 AM	7/11/2025, 12:00 AM	Scheduled Flow	08egK000006VWvW
<a href="#">Del</a>	Metalytics Data Loader Job for Org: 000Gk000006Ubt9	User_Integration	6/30/2025, 3:17 PM	7/9/2025, 11:10 PM	7/10/2025, 11:10 PM	Autonomous Data Loader Job	08egK000006FGId
	Program Milestone Computation Cron Job	Process, Automated	6/30/2025, 3:17 PM	7/9/2025, 11:59 PM	7/10/2025, 6:59 AM	Program Milestone Computation Cron Job	08egK000006FGId
	Program Status Update Cron Job	Process, Automated	6/30/2025, 3:17 PM	7/10/2025, 5:01 AM	7/10/2025, 8:00 PM	Program Status Update Cron Job	08egK000006FGId

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 | Other | All

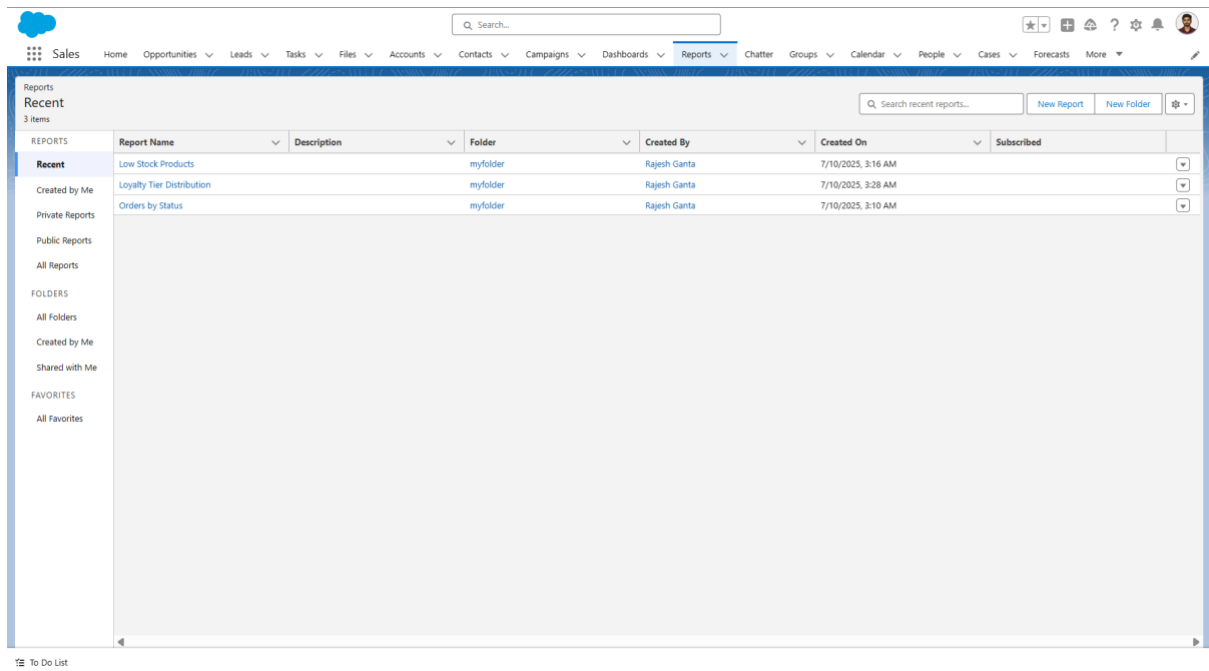
## 18. Dashboard

Dashboards in Salesforce visually represent your data through charts, tables, and metrics, enabling real-time insights into business performance. For the HandsMen Threads CRM system, a custom dashboard was created to monitor sales, customer engagement, product inventory, and marketing effectiveness.



## 19. Reports

Reports in Salesforce help analyze key business data and make informed decisions. For the HandsMen Threads CRM project, custom report types and reports were created to track orders, customer loyalty, and product inventory.



## 20. Challenges & Learnings

### Challenges Faced:

- Understanding object relationships (Lookup vs Master-Detail).
- Creating correct access levels via role hierarchy.
- Debugging Apex logic and testing flows.

### Key Learnings:

- Hands-on experience in Salesforce Admin and Developer capabilities.
- Implemented real-world use cases with automation tools.
- Improved problem-solving using flows and custom logic.

## **21. Tools & Technologies Used**

- Salesforce Lightning Experience
- Apex Programming
- Flow Builder
- SOQL / SOSL
- Data Loader
- Report & Dashboard Builder

## **22.conculsion**

Throughout the project, a fully customized Salesforce platform was designed and implemented to streamline core business operations for a premium men's fashion brand. Key modules such as customer management, order processing, inventory tracking, loyalty programs, and marketing campaigns were modeled using standard and custom objects, supported by automation tools like Flows, Apex Triggers, and Batch Jobs.

Interactive Reports and Dashboards were also built to provide real-time insights into sales performance, customer segmentation, and stock status—empowering decision-makers with accurate and timely data.

This project enhanced technical skills in:

- Salesforce Object Model Design
- Declarative Automation (Flows, Email Alerts)
- Programmatic Logic (Apex, Triggers, Batch Apex)
- Data Security (Roles, Profiles, Permission Sets)
- Analytics (Custom Reports and Dashboards)



## 23. References

1. Salesforce Trailhead

<https://trailhead.salesforce.com>

Used for understanding concepts like custom objects, flows, Apex triggers, dashboards, and security models.

2. Salesforce Help Documentation

<https://help.salesforce.com>

Referred for technical configurations, Flow builder logic, report customization, and batch job scheduling.

3. SmartBridge Salesforce Internship Materials

Project-specific guidance and tasks were provided by the SmartBridge team during the internship.

4. Apex Developer Guide

<https://developer.salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/>

For writing and testing Apex classes, triggers, and batch jobs.

5. Salesforce Admin Guide

<https://admin.salesforce.com>

Helped with setting up profiles, permission sets, page layouts, and app management.

- 6. Mentorship and Faculty Support**

Guidance and feedback from mentors at SmartBridge.