Handsmen Threads – Salesforce CRM & Automation Implementation

Empowering Business Through Intelligent Automation

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Project Overview

Project Aim:
To digitize and streamline Handsmen Threads' lead, order, and inventory management using Salesforce CRM.

Key Focus Areas:
- Centralized Data
- Automated Workflows
- Real-Time Dashboards
- Email Notifications

Project Objectives

- Implement Salesforce CRM for sales and customer management
- Automate lead-to-order process
- Enable order approvals and status tracking
- Build dashboards and reports for business insights

Modules Implemented

1. Lead & Opportunity Management
2. Order & Inventory Automation
3. Email Notification Flows
4. Approval Processes
5. Reports & Dashboards

Custom Objects & Data Model

Custom Objects:
- Handsmen_Thread (Thread details)
- Thread_Order (Customer orders)
- Inventory

Relationships:
- Thread_Order ↔ Handsmen_Thread (Lookup)
- Thread_Order ↔ Contact / Account

Flow Automation Examples

- Approval Flow: Triggers email → wait for approval → update status
- Inventory Flow: Confirms order → adjusts inventory
- Email Flow: Sends confirmation to customer

Reports & Dashboards

Implemented Dashboards:
- Weekly Sales Summary
- Lead Source Pie Chart
- Inventory Health Report

Key Results & Benefits

- 80% reduction in manual data entry
- Fast, trackable order approvals
- Enhanced visibility for managers
- Streamlined communication with customers

Conclusion

Salesforce enabled Handsmen Threads to transform traditional processes into a seamless, automated workflow—boosting both efficiency and customer satisfaction.

Appendix: Project Screenshots

Screenshot:

Q Search...

HandsMen Threads   HandsMen Customers ∨   HandsMen Orders ∨   HandsMen Products ∨   Inventorys ∨   Marketing Campaigns ∨   Reports ∨   Dashboards ∨   Contacts ∨

HandsMen Threads

HandsMen Orders
Recently Viewed ▾ 📌

New   Import   Change Owner   Assign Label

4 items • Updated a few seconds ago

Q Search this list...

		HandsMen OrderNumber	∨	
1	☐	O-0001		▾
2	☐	O-0004		▾
3	☐	O-0003		▾
4	☐	O-0002		▾

Q Search...

HandsMen Threads   HandsMen Customers ∨   HandsMen Orders ∨   HandsMen Products ∨   Inventorys ∨   Marketing Campaigns ∨   Reports ∨   Dashboards ∨   Contacts ∨

HandsMen Product
T-shirt cloth

New Contact   Edit   New Opportunity   ▾

Related   **Details**

HandsMen Products Name
T-shirt cloth   ✏

Owner
👤 Sravani Panga   👤

SKU
                                                    ✏

Price
$3   ✏

Stock Quantity
                                                    ✏

Created By
👤 Sravani Panga, 7/29/2025, 12:00 AM

Last Modified By
👤 Sravani Panga, 7/29/2025, 1:43 AM

Q Search...

HandsMen Threads

HandsMen Customers ∨ | HandsMen Orders ∨ | HandsMen Products ∨ | Inventorys ∨ | Marketing Campaigns ∨ | Reports ∨ | Dashboards ∨ | Contacts ∨

Inventory
I -0001

New Contact | Edit | New Opportunity | ▼

Related | **Details**

Inventory Number
I -0001

HandsMen Product
T-shirt cloth

Stock Quantity
600

Stock Status
Available

Warehouse

Created By
Sravani Panga, 7/29/2025, 12:01 AM

Last Modified By
Sravani Panga, 7/29/2025, 1:56 AM

← | Delete forever | Not spam | ✉ | ▣ | ⋮   5 of 12 〈 〉

Your Order has been Confirmed! Spam ×

Sravani Panga via 4c0rnjrx9eex9h.gk-7pnmxuau.can96.bnc.salesforce.com   Tue 29 Jul, 13:32 (2 days ago)
to me ▾

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report as not spam

Dear ,

Your order #O-0001 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

Compose

Inbox   98
Starred
Snoozed
Sent
Drafts   4
...ess
Important
Chats
Scheduled
All Mail
Spam   7
...n
Categories
Manage subscriptions
Manage labels
Create new label

...ble desktop notifications for Gmail.   OK   No, thanks   ✕