

Handsmen Threads – Salesforce CRM & Automation Implementation

Empowering Business Through Intelligent Automation

Presented by: P. Sravani

College: Gates Institute of Technology

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:

The top screenshot displays a project management interface for 'HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion'. The project is in the 'Workspace' view and is currently 'In Progress'. It is assigned to 'Morumpalli Jayasudha' and has a duration of 20 minutes. The main task is 'Creating Developer Account', which involves creating a developer org in Salesforce. The task description includes two steps: 1. Go to <https://developer.salesforce.com/signup> and 2. On the sign up form, enter the following details. Below the text is a visual representation of the Salesforce Developer Edition sign-up process. The right sidebar shows the 'Project Progress' with a 50% completion bar and a list of sub-tasks: 'Use Case' (50%), 'User Story' (50%), 'Salesforce Cerdentials Setup' (50%), 'Developer Account Creation', 'Account Verification', and 'Data Management - Objects' (50%).

The bottom screenshot shows a customer profile for 'john' in the 'HandsMen Threads' CRM. The profile is located at orgfarm-3d63f9d275-dev-ed.develop.lightning.force.com/lightning/r/HandsMen_Customer_c/a00gK00000BvvzKQAR/view. The profile details include: HandsMen Customer Name: john, Email: pangasravani170@gmail.com, Phone: (blank), Loyalty Status: Bronze, FirstName: john, LastName: m, FullName: john m, Total Purchases: 500, Created By: Sravani Panga, 7/28/2025, 11:58 PM, and Last Modified By: OrgFarm EPIC, 7/29/2025, 1:33 AM. The profile is owned by 'Sravani Panga'.

orgfarm-3d63f9d275-dev-ed.develop.lightning.force.com/lightning/o/HandsMen_Order_c/list?filterName=__Recent

HandsMen Threads HandsMen Customers HandsMen Orders HandsMen Products Inventories Marketing Campaigns Reports Dashboards Contacts

HandsMen Orders Recently Viewed 4 items • Updated a few seconds ago

New Import Change Owner Assign Label

Search this list...

	HandsMen OrderNumber	
1	<input type="checkbox"/> O-0001	
2	<input type="checkbox"/> O-0004	
3	<input type="checkbox"/> O-0003	
4	<input type="checkbox"/> O-0002	

orgfarm-3d63f9d275-dev-ed.develop.lightning.force.com/lightning/r/HandsMen_Products_c/a01gK00000Ea0FyQAJ/view

HandsMen Threads HandsMen Customers HandsMen Orders HandsMen Products Inventories 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

orgfarm-3d63f9d275-dev-ed.develop.lightning.force.com/lightning/r/Inventory__c/a03gK000005VX6TQAW/view

HandsMen Threads HandsMen Customers HandsMen Orders HandsMen Products Inventories 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

mail.google.com/mail/u/0/?tab=rm&ogbl#spam/FMfcgzQbgRvDvWLVQwPjfdVXBLphVcQZ

Delete forever Not spam 5 of 12

Your Order has been Confirmed! Spam

[Sravani Panga](#) 402mjvfeex7hjk-7pmsuau.ca@bnc.salesforce.com Tue 29 Jul, 13:32 (2 days ago)

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

able desktop notifications for Gmail. OK No, thanks