

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

Salesforce project mainly focuses on CRM[Customer Relationship Management]

->CRM is a strategic process where businesses aim to manage and analyze customer interactions to optimize communication, enhance satisfaction, and promote growth.

The problem of project:

HandsMen Threads, a dynamic organization in the fashion industry, is embarking on a Salesforce project designed to revolutionize their data management and enhance customer relations.

->Want to build objects which stores the data of the customer

->create a seamless flow of information across the organization

->Maintenance of data integrity from user interface[Maintains the accuracy and consistency of data]

Solution:

->Create the needed custom objects

->Automated Order Confirmations: Post-order confirmation, customers will receive an email update, fostering engagement and strengthening customer relations.

->Dynamic Loyalty Program: Customer loyalty statuses will be updated based on purchase history, enabling personalized rewards and promoting repeat business.

->Proactive Stock Alerts: When stock levels drop below five units, automatic emails will notify the warehouse team, ensuring timely restocking and preventing stockouts.[This is for Company Management]

->Scheduled Bulk Order Updates: Daily midnight, the system will process bulk orders, updating financial records and adjusting inventory, ensuring accurate stock levels for daily operations.[Inventory object]

1. Project Phases

Phase 1: Architecture & Planning

Define objects, fields, relationships, formula fields.

Establish validation rules, flows, Apex triggers, batch jobs.

Design email templates for notifications and customer communication.

Phase 2: Development

Object and field creation.

Implement automation (flows, process builders, Apex triggers).

Set up data security and sharing rules.

Develop batch jobs for scheduled processing.

Configure email templates and notifications.

Phase 3: Testing & QA

Unit testing of objects and automation.

End-to-end testing with sample data.

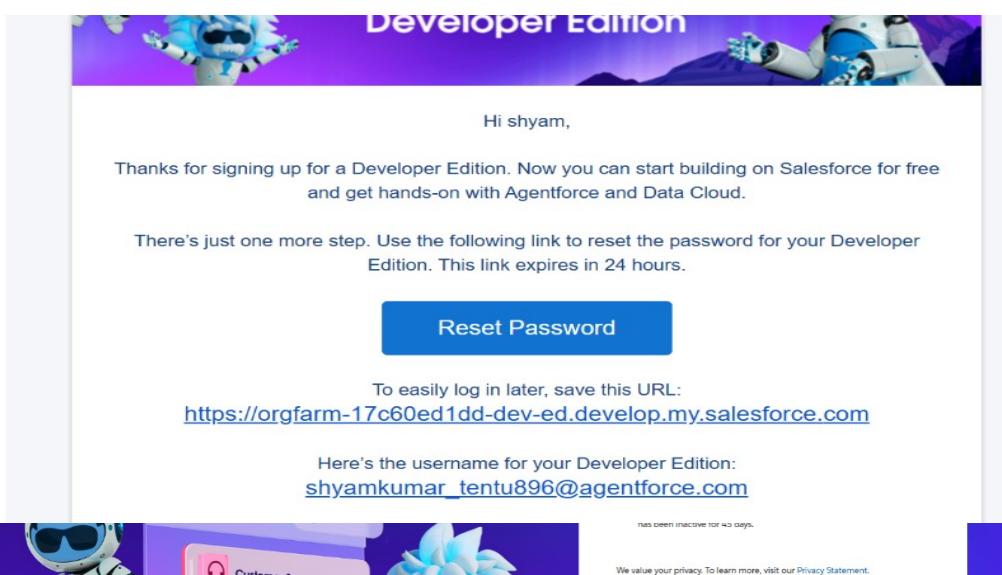
Performance testing and security checks.

Phase 4: Deployment & Training

Deploy to production.

Train users on new functionality.

Post-go-live support and monitoring



Creation of developer account:

A screenshot of the Salesforce login page. It features the classic blue cloud logo at the top. The main form has fields for "Username" (containing "shyamkumar_tentu896@agentforce.com") and "Password". Below the password field is a "Log In" button. There are "Remember me" and "Forgot Your Password?" links, and a "Log In with Email" button. At the bottom are "Not a customer?" and "Try for Free" links, along with a copyright notice. To the right of the login form is a promotional section for Agentforce, featuring a banner with the text "Manage, optimize, and scale your hybrid workforce." and two buttons: "Read the release" and "Explore Agentforce". Below the banner is an image of a digital interface showing various agent profiles and metrics.

Data Management:

Creating objects:

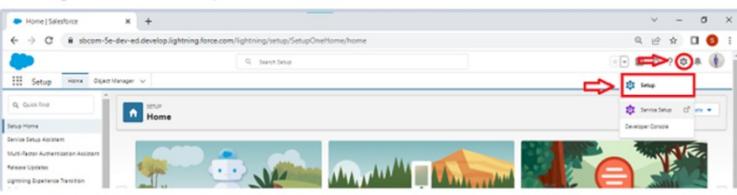
HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion

Overview **Workspace** Kanban

Assigned to **T. Shyam Kumar**

Description

To Navigate to Setup page:
Click on gear icon → click setup.



Activity 1: Create HandsMen Customer Object

To create an object:

- From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



Creation tabs:

The screenshot shows the Salesforce Setup interface. In the top left, there's a 'Story' button and a duration indicator of '25m'. Below it, a message says 'Assigned to T. Shyam Kumar'. Under 'Description', there's a section titled 'Creating a Custom Tab(HandsMen Customer)'. It includes instructions: 'Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)'. A red box highlights the 'Tabs' tab in the 'Custom Object Tabs' section. The 'Label' field contains 'Handsmen Customer'. The 'Tab Style' dropdown is set to 'Bell'. The 'Description' field is empty. On the right, a progress bar for 'Project Progress' is at 90%, with various tasks like 'Use Case', 'User Story', and 'Data Management - Objects' also at 90% completion.

Create a lightning App:

The screenshot shows the Salesforce Setup interface under 'App Manager'. A red box highlights the 'New Lightning App' button. The 'Label' field contains 'HandsMen Threads'. The 'Description' field is empty. On the right, a progress bar for 'Project Progress' is at 90%, with various tasks like 'Use Case', 'User Story', and 'Data Management - Objects' also at 90% completion.

Created App:

App Settings

App Details & Branding

App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name: HandsMen Threads

* Developer Name: HandsMen_Threads

Description: Developing a premium fashion platform to streamline men's bespoke tailoring and...

App Branding

Image: Upload

Primary Color Hex Value: #0070D2

Org Theme Options: Use the app's image and color instead of the org's custom theme

App Launcher Preview

App Settings

App Details & Branding

App Options
Utility Items (Desktop Only)
Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

- Activation Targets
- Activations
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Approval Submission Details
- ...

Selected Items

- HandsMen Customer
- HandsMen Orders
- HandsMen Products
- Inventory
- Reports
- Dashboards
- Accounts
- Contacts

App Settings

App Details & Branding

App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles

User Profiles

Choose the user profiles that can access this app.

Available Profiles

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Anypoint Integration
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User

Selected Profiles

- System Administrator

Created fields:

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

Overview Workspace Kanban

Object Name	Type	Description	Key Fields
HandsMen Customer__c	Custom Object	Stores customer details	Name (Record Name), Email (Email), Phone (Phone), Loyalty_Status__c (Picklist: Bronze, Gold, Silver) [Loyalty status field is already created in previous activity do not create it again], Total_Purchases__c (Number)
HandsMen Product__c	CustomObject	Stores product catalog	Name (Record Name), SKU (Text), Price (Currency), Stock_Quantity__c (Number)
HandsMen Order__c	CustomObject	Stores customer orders	Order_Number (Record Name), Status (Picklist: Pending, Confirmed, Rejection), Quantity__c (Number), Total_Amount__c(Number)
Inventory__c	CustomObject	Tracks inventory levels	Auto Number (Record Name), Warehouse (Text), Stock_Quantity__c (Number)
Marketing_Campaign__c	CustomObject	Manages promotions & campaigns	Campaign_Name (Record Name), Start_Date (Date), End_Date (Date)

User Story	90%
Salesforce Credentials Setup	90%
Data Management - Objects	90%
Data Management - Tabs	90%
Data Management - App Manager	90%
Data Management - Fields	90%
Field - Email	
Field - Phone	
Field - Loyalty Status	
Create Lookup Relationship	
Formula Fields	
Create Remaining fields for the objects	
Data Configuration	90%

HandsMen Threads

HandsMen Customer

Recently Viewed

HandsMen Customer Name

Owner: shyam kumar

Information

- *HandsMen Customer Name:
- Email:
- Phone:
- Loyalty Status:
- Total Purchases:
- FirstName:
- LastName:

Cancel Save & New Save

HandsMen Threads

HandsMen Orders

Recently Viewed

HandsMen OrderNumber

Owner: shyam kumar

Information

- HandsMen OrderNumber:
- HandsMen Customer:
- Status:
- Quantity:
- Total Amount:
- *Customer Email:
- HandsMen Product:

Cancel Save & New Save

HandsMen Threads

HandsMen Customer | HandsMen Orders | HandsMen Products | Inventory | Marketing Campaigns | Reports | Dashboards | Accounts | Contacts

Recently Viewed

1 item • Updated a few seconds ago

HandsMen Product Name

1 T-cloth

New HandsMen Product

* = Required Information

Information

*HandsMen Product Name:

Owner: shyam kumar

SKU:

Price:

Stock Quantity:

Import | Change Owner | Assign Label

HandsMen Threads

HandsMen Customer | HandsMen Orders | HandsMen Products | Inventory | Marketing Campaigns | Reports | Dashboards | Accounts | Contacts

Recently Viewed

4 items • Updated a few seconds ago

Inventory Number

1 I-0005
2 I-0004
3 I-0003
4 I-0002

New Inventory

* = Required Information

Information

Inventory Number:

*HandsMen Product: Search HandsMen Products...

Warehouse:

Stock_Quantity:

New | Import | Assign Label

Cancel | Save & New | Save

The screenshot shows the 'New Marketing Campaign' page in the Marketing Campaigns section of the Salesforce interface. The page includes fields for Marketing Campaign Number, Owner (set to 'shyam kumar'), HandsMen Customer (with a search bar), Start Date, and End Date. Buttons at the bottom include 'Cancel', 'Save & New', and 'Save'. A message at the bottom states 'Nothing to see here' and 'There's nothing in your list yet. Try adding a new record.'

Data Configuration:

Validation Rules:

Assigned to **T. Shyam Kumar**

Description

Validation Rules

Object	Field	Validation Rule
HandsMen Order__c	Total_Amount__c	Total_Amount__c <= 0
Inventory__c	Stock_Quantity__c	Stock_Quantity__c < = 0
HandsMen Customer__c	Email	NOT CONTAINS>Email, "@gmail.com"

Project Progress

90%

[View Demo](#) [Edit](#) [Add Github Link](#)

Use Case	90% ▼
User Story	90% ▼
Salesforce Cerdentials Setup	90% ▼
Data Management - Objects	90% ▼
Data Management - Tabs	90% ▼
Data Management - App Manager	90% ▼
Data Management - Fields	90% ▼
Data Configuration	90% ▼
Validation Rules	90% ▼

Create Remaining Validation Rules

Activity 1 : Creating the validation rule

Creating the validation rule for Postal Code field in HandsMen Order__c object

Note : check whether the fields mentioned in the formula field are created or not , if not create those fields mentioned in **HandsMen Order__c** object.

1. Go to setup → click on Object Manager → type object name(**HandsMen Order__c**) in quick find bar → click on the object.
2. Click on the validation rule → click New.

Work Done:

The screenshot shows the 'HandsMen Order' object details page in the Object Manager. On the left, there are navigation links for Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. The main content area displays the 'HandsMen Order Validation Rule' configuration. It includes sections for 'Validation Rule Detail' (Rule Name: Total_Amount, Error Condition Formula: Total__c <= 0, Error Message: Please Enter Correct Amount, Description: , Created By: shyam kumar, 7/7/2025, 2:52 AM), 'Active' status (checked), and 'Help for this Page' link.

SETUP > OBJECT MANAGER

Inventory

Inventory Validation Rule

[Back to Inventory](#)

Validation Rule Detail

Rule Name	Stock_Quantity	Active	✓
Error Condition Formula	Stock_Quantity__c <=0	Error Location	Top of Page
Error Message	the inventory count is never less than zero	Created By	shyam kumar, 7/7/2025, 2:55 AM
Description		Modified By	shyam kumar, 7/7/2025, 2:55 AM
Created By	shyam kumar, 7/7/2025, 2:55 AM	Modified By	shyam kumar, 7/7/2025, 2:55 AM
Field Sets		Field Sets	

SETUP > OBJECT MANAGER

HandsMen Customer

HandsMen Customer Validation Rule

[Back to HandsMen Customer](#)

Validation Rule Detail

Rule Name	Email	Active	✓
Error Condition Formula	NOT CONTAINS(Email__c , "@gmail.com")	Error Location	Top of Page
Error Message	Please fill Correct Gmail	Created By	shyam kumar, 7/7/2025, 2:57 AM
Description		Modified By	shyam kumar, 7/7/2025, 2:57 AM
Created By	shyam kumar, 7/7/2025, 2:57 AM	Modified By	shyam kumar, 7/7/2025, 2:57 AM
Field Sets		Field Sets	

Data Security:

User Profiles:

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

Overview **Workspace** Kanban

Story Duration: 20m

T. Assigned to T. Shyam Kumar

Description

Creating Profile

1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard user) → enter profile name (Platform 1) → Save.

Setup Home Object Manager

Profiles

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text"/>

Project Progress

90%
View Demo
Add Github Link
Use Case
User Story
Salesforce Credentials Setup
Data Management - Objects
Data Management - Tabs
Data Management - App Manager
Data Management - Fields
Data Configuration
Data security - Profiles

Setup Home Object Manager

Search Setup

Profiles

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Partner.App_Subscription_User	Partner App Subscription	<input type="checkbox"/>
<input type="checkbox"/>	Partner_Community_Login_User	Partner Community Login	<input type="checkbox"/>
<input type="checkbox"/>	Partner_Community_User	Partner Community	<input type="checkbox"/>
<input type="checkbox"/>	Platform_1	Salesforce	<input checked="" type="checkbox"/>

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

Help for this Page

Roles:

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

Overview Workspace Kanba

Role - Sales

Story Duration: 20m

T. Assigned to T. Shyam Kumar

Review

Project Details Comments

Project Progress

90%

View Demo	Add Github Link
Use Case	90% ▾
User Story	90% ▾
Salesforce Credentials Setup	90% ▾
Data Management - Objects	90% ▾
Data Management - Tabs	90% ▾
Data Management - App Manager	90% ▾
Data Management - Fields	90% ▾
Data Configuration	90% ▾
Data security - Profiles	90% ▾

Description

Creating Sales Manager Role:

1. Go to quick find → Search for Roles → click on set up roles.

Setup Home Object Manager

Roles

Understanding Roles

Set up your role hierarchy to control how your organization reports on and accesses data.

See also: [Territory-Based Scripts](#)

View other example role hierarchies: [Territory-Based Scripts](#)

2. Click on Expand All and click on add role under whom this role works(Here Click Add Role Under CEO role).

Collapse All Expand All

- SDC Trainer Pvt Ltd
 - Add Role
 - CEO
 - Add Role
 - CFO
 - Add Role

ROLES

Users Roles

Sales Contact Roles on Contracts Contact Roles on Opportunities

Service Case Teams Case Team Roles Contact Roles on Cases

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

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

Collapse All Expand All

- Smartbridge
 - Add Role
 - CEO
 - Add Role
 - CFO
 - Add Role
 - COO
 - Add Role
 - Inventory
 - Add Role
 - Marketing
 - Add Role
 - Sales
 - Add Role
 - SVP.Customer.Service & Support
 - Add Role
 - Customer.Support.International
 - Add Role
 - Customer.Support.North America
 - Add Role
 - Installation & Repair Services
 - Add Role

Show in tree view

Creating Users:

Handsmen Threads: Elevating the Art of Sophistication in Men's Fashion

Overview Workspace Kanban

User - Niklaus

Story Duration: 20m

Assigned to T. Shyam Kumar

Description

Create User

1. Go to setup – type users in quick find box → select users → click New user.
2. Fill in the fields
3. First Name : Niklaus
4. Last Name : Mikaelson
5. Alias : Give an Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : Sales
10. User license : Salesforce Platform
11. Profiles : Platform 1

SETUP
Users

Project Details Comments

Project Progress 90%

View Demo Edit Add Github Link

Task	Progress
Use Case	90%
User Story	90%
Salesforce Credentials Setup	90%
Data Management - Objects	90%
Data Management - Tabs	90%
Data Management - App Manager	90%
Data Management - Fields	90%
Data Configuration	90%

users

Users

User Detail

	Name	Niklaus Mikaelson	Role	Sales
Alias	nmika	User License Profile	Salesforce Platform	Platform_1
Email	shyamantu2005@gmail.com [Verify]	Active	<input checked="" type="checkbox"/>	
Username	shyamantu5678@gmail.com	Marketing User	<input type="checkbox"/>	
Nickname	User1751883035541175781	Offline User	<input type="checkbox"/>	
Title		Knowledge User	<input type="checkbox"/>	
Company		Flow User	<input type="checkbox"/>	
Department		Service Cloud User	<input type="checkbox"/>	
Division		Site.com Contributor User	<input type="checkbox"/>	
Address		Site.com Publisher User	<input type="checkbox"/>	
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	WDC User	<input type="checkbox"/>	
Locale	English (United States)	Mobile Push Registrations	<input type="checkbox"/>	
Language	English	Data.com User Type	<input type="checkbox"/>	
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>	
Manager		Debug Mode	<input type="checkbox"/>	
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input checked="" type="checkbox"/>	
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>	
App Registration: One-Time Password Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>	
App Registration: Salesforce Authenticator		Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>	
Security Key (UI2F or WebAuthn)				

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

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

Overview Workspace Kanban

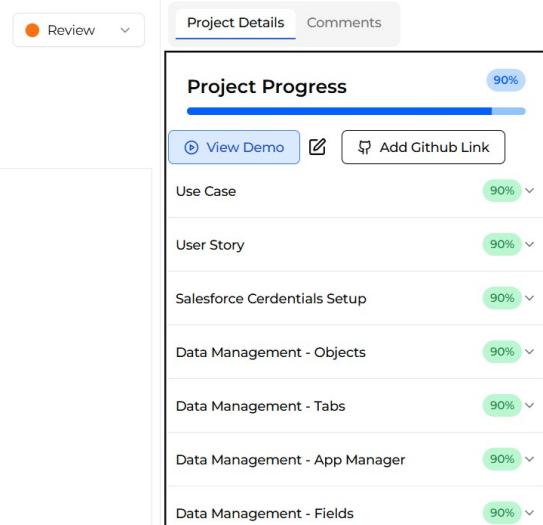
User - Kol

Story Duration: 20m

T. Assigned to T. Shyam Kumar

Description

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields
 - First Name : Kol
 - Last Name : Mikaelson
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.text
 - Nick Name : Give a Nickname
 - Role : Inventory
 - User license : Salesforce Platform
 - Profiles : Platform 1
3. Save.



users

Users

User Niklaus Mikaelson

User Profile Help for this Page

User Detail

	Name	Niklaus Mikaelson	Role	Sales
Alias	nmika	User License Profile	Salesforce Platform	Platform_1
Email	shyamantu2005@gmail.com [Verify]	Active	<input checked="" type="checkbox"/>	
Username	shyamantu5678@gmail.com	Marketing User	<input type="checkbox"/>	
Nickname	User1751883035541175781	Offline User	<input type="checkbox"/>	
Title		Knowledge User	<input type="checkbox"/>	
Company		Flow User	<input type="checkbox"/>	
Department		Service Cloud User	<input type="checkbox"/>	
Division		Site.com Contributor User	<input type="checkbox"/>	
Address		Site.com Publisher User	<input type="checkbox"/>	
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	WDC User	<input type="checkbox"/>	
Locale	English (United States)	Mobile Push Registrations	<input type="checkbox"/>	
Language	English	Data.com User Type	<input type="checkbox"/>	
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>	
Manager		Debug Mode	<input type="checkbox"/>	
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/>	
Federation ID				

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

Created one more user[user1] and all my licenses are finished:

New User Reset Password(s) Add Multiple Users						
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00dg000006y32uag_q2m7wm2v62mu@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	QEPIC	epic_th_d20077735cba@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	kumar.shyam	shy	shyamkumar_tentu896@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Mikaelson.Kol	kmika	shyamtentu0876@gmail.com	Inventory	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/> Edit	Mikaelson.Niklaus	nmika	shyamtentu567@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dg000006y32uag.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dg000006y32uag.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	user1_my	muser	shyamtentu0001@gmail.com	Sales	<input checked="" type="checkbox"/>	Standard Platform User

Permission Sets:

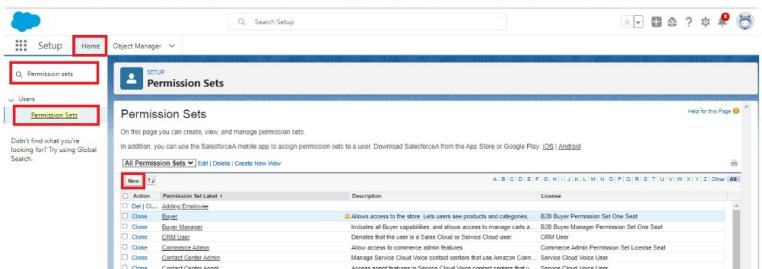
HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion

Overview | Workspace | Kanban

Assigned to T. Shyam Kumar

Description

1. Go to setup → type "permission sets" in quick search → select permission sets → New.



2. Enter the label name as "Permission_Platform_1" → save.

3. Under Apps Select object settings.

Apps

- Assigned Apps
- Assigned Connected Apps
- Object Settings** (highlighted)
- App Permissions

Project Progress

90%

[View Demo](#) [Add GitHub Link](#)

Use Case	90%
User Story	90%
Salesforce Credentials Setup	90%
Data Management - Objects	90%
Data Management - Tabs	90%
Data Management - App Manager	90%
Data Management - Fields	90%
Data Configuration	90%
Data security - Profiles	90%

Setup | Home | Object Manager

permis

Users

- Permission Set Groups
- Permission Sets** (highlighted)
- Custom Code
- Custom Permissions

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

Permission Sets

Permission Set Overview

Permission_Platform_1

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

Custom Description	API Name: Permission_Platform_1
License	Namespace Prefix
Session Activation Required	Created By: shyam.kumar, 7/7/2025, 3:30 AM
Permission Set Groups Added To: 0	Last Modified By: shyam.kumar, 7/7/2025, 3:33 AM

Apps

- Assigned Apps
- Assigned Connected Apps
- Object Settings** (highlighted)
- App Permissions
- Apex Class Access
- Visualforce Page Access

Enabled permissions for handmen customer:

Permission Set
Sales Permission set

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

Permission Set Overview

Description	API Name
License	Sales_Permission_set
Session Activation Required	Created By: shyam kumar, 7/22/2025, 12:19 AM
Permission Set Groups Added To	Last Modified By: shyam kumar, 7/22/2025, 12:20 AM

Apps

- Assigned Apps**: Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**: Permissions to execute Apex classes
- Visualforce Page Access**: Permissions to execute Visualforce pages

SETUP
Permission Sets

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

Permission Set Overview

Description	API Name
License	marketing_permission_set
Session Activation Required	Created By: shyam kumar, 7/22/2025, 12:23 AM
Permission Set Groups Added To	Last Modified By: shyam kumar, 7/22/2025, 12:25 AM

Apps

- Assigned Apps**: Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**: Permissions to execute Apex classes
- Visualforce Page Access**: Permissions to execute Visualforce pages

Permission Set
inventory permission set

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

Permission Set Overview

Description	API Name
License	inventory_permission_set
Session Activation Required	Created By: shyam kumar, 7/22/2025, 12:22 AM
Permission Set Groups Added To	Last Modified By: shyam kumar, 7/22/2025, 12:22 AM

Apps

- Assigned Apps**: Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**: Permissions to execute Apex classes
- Visualforce Page Access**: Permissions to execute Visualforce pages

Create an email template:

Create an Order Confirmation Email Template

Story Duration: 20m

T. Assigned to T. Shyam Kumar

Description

Steps to Create a Classic Email Template

1. Go to Salesforce Setup
 - Click on the Gear Icon (⚙️) in the top-right corner and select Setup.
2. Navigate to Classic Email Templates
 - In Quick Find, search for Classic Email Templates and click on it.
3. Click "New Template"

Project Details Comments

Project Progress

View Demo	Add Github Link
Use Case	90% ▾
User Story	90% ▾
Salesforce Credentials Setup	90% ▾
Data Management - Objects	90% ▾
Data Management - Tabs	90% ▾
Data Management - App Manager	90% ▾
Data Management - Fields	90% ▾
Data Configuration	90% ▾

Order_Confirmation_Email

Preview your email template below.

Email Template Detail

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

Email Templates from Salesforce		Unfiled Public Classic Email Templates	
Email Template Name	Order_Confirmation_Email	Available For Use	<input checked="" type="checkbox"/>
Template Unique Name	Order_Confirmation_Email	Last Used Date	
Classic Letterhead	Email Classic Letterhead	Times Used	
Email Layout	Free Form Letter		
Encoding	Unicode (UTF-8)		
Author	shyam kumar [Change]		
Description			
Created By	shyam.kumar, 7/7/2025, 4:01 AM	Modified By	shyam.kumar, 7/7/2025, 4:01 AM
Edit Properties		Edit HTML Version	Edit Text Version
Delete		Clone	

HTML Email Template

Low Stock Alert

Help for this Page

Preview your email template below.

Email Template Detail

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

Email Templates from Salesforce		Unfiled Public Classic Email Templates	
Email Template Name	Low Stock Alert	Available For Use	<input checked="" type="checkbox"/>
Template Unique Name	Low_Stock_Alert	Last Used Date	
Classic Letterhead	Email Classic Letterhead	Times Used	
Email Layout	Free Form Letter		
Encoding	Unicode (UTF-8)		
Author	shyam kumar [Change]		
Description			
Created By	shyam.kumar, 7/7/2025, 4:03 AM	Modified By	shyam.kumar, 7/7/2025, 4:03 AM
Edit Properties		Edit HTML Version	Edit Text Version
Delete		Clone	

HTML Email Template

Loyalty Program Email

Help for this Page

Preview your email template below.

Email Template Detail

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

Email Templates from Salesforce		Unfiled Public Classic Email Templates	
Email Template Name	Loyalty Program Email	Available For Use	<input type="checkbox"/>
Template Unique Name	Loyalty_Program_Email	Last Used Date	
Classic Letterhead	Email Classic Letterhead	Times Used	
Email Layout	Free Form Letter		
Encoding	Unicode (UTF-8)		
Author	shyam kumar [Change]		
Description			
Created By	shyam.kumar, 7/7/2025, 4:05 AM	Modified By	shyam.kumar, 7/7/2025, 4:05 AM
Edit Properties		Edit HTML Version	Edit Text Version
Delete		Clone	

Create an Email Alert:

Create an Email Alert

Story Duration: 20m

T. Assigned to T. Shyam Kumar

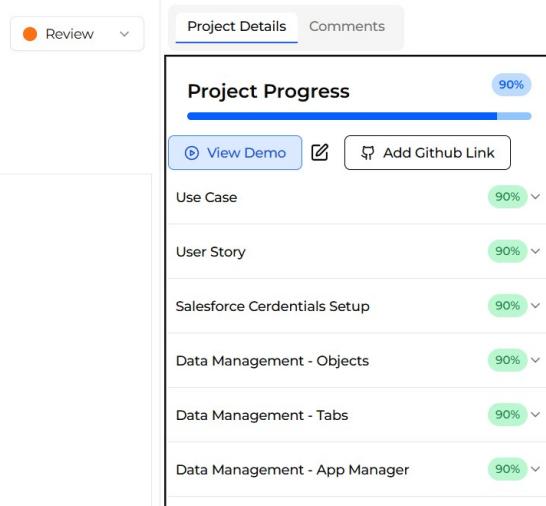
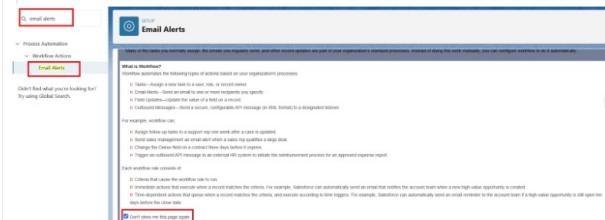
Description

Create an email alert to send an email when an order is confirmed.

Steps to Create an Email Alert

1. Go to Setup

- In Quick Find, search for Email Alerts and click on it.



Create an order confirmation email:

Email Alert Low Stock Alert

[Rules Using This Email Alert \(0\)](#) | [Approval Processes Using This Email Alert \(0\)](#) | [Entitlement Processes Using This Email Alert \(0\)](#)

[Help for this Page](#) ?

Email Alert Detail

Description	Low Stock Alert	Email Template	Low Stock Alert
Unique Name	Low_Stock_Alert	Object	Inventory
From Email Address	"shyam kumar" <shyamtentu2005@gmail.com>		
Recipients	User_shyam kumar		
Additional Emails			

Created By shyam kumar 7/21/2025, 10:28 PM

Modified By shyam kumar, 7/22/2025, 1:41 AM

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

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

 **shyam kumar** shyamtentu2005@gmail.com via qyy683m8xz71.gl-6iy32uag.can98.bn... 2:12 PM (27 minutes ago) ☆ ↵ ⋮

to me ▾

Dear Inventory Manager,

This is to inform you that the stock for the following product is running low:

Product Name: T-cloth

Current Stock Quantity: 4

Please take the necessary steps to restock this item immediately.

Best Regards,

Inventory Monitoring System

Email Alert
Loyalty Program email

[Rules Using This Email Alert \[0\]](#) | [Approval Processes Using This Email Alert \[0\]](#) | [Entitlement Processes Using This Email Alert \[0\]](#)  Help for this Page 

Email Alert Detail		Edit	Delete	Clone
Description	Loyalty Program email	Edit	Delete	Clone
Unique Name	Loyalty_Program_email			
From Email Address	"shyam kumar" <shyamtentu2005@gmail.com>			
Recipients	Email Field: Email			
Additional Emails				
Created By	shyam.kumar, 7/21/2025, 10:29 PM			
		Edit	Delete	Clone
		Modified By	shyam.kumar, 7/22/2025, 1:46 AM	

 **OrgFarm EPIC <epic.orgfarm@salesforce.com>** 11:22 AM (3 hours ago) ☆ ☺ ↵ ⋮

to me ▾

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

Report not spam i

Congratulations! You are now a Bronze member and you are eligible for our Loyalty Rewards Program.

Enjoy exclusive discounts, early access to offers, and special member benefits.

Thank you for your continued Support.

Email Alert
Order Confirmation Email Alert

 Help for this Page

Email Alert Detail

Description	Order Confirmation Email Alert	Email Template	Order_Confirmation_Email
Unique Name	Order_Confirmation_Email_Alert	Object	HandsMen Order
From Email Address	"shyam kumar" <shyamtentu2005@gmail.com>		
Recipients	Email Field: Customer Email		
Additional Emails			
Created By	shyam kumar, 7/7/2025, 4:07 AM	Modified By	shyam kumar, 7/22/2025, 1:28 AM

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

Your Order has been Confirmed! Spam



shyam kumar shyamtentu2005@gmail.com via 5m1y... 1:59 PM (44 minutes ago)    
to me ▾

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

[Report not spam](#)



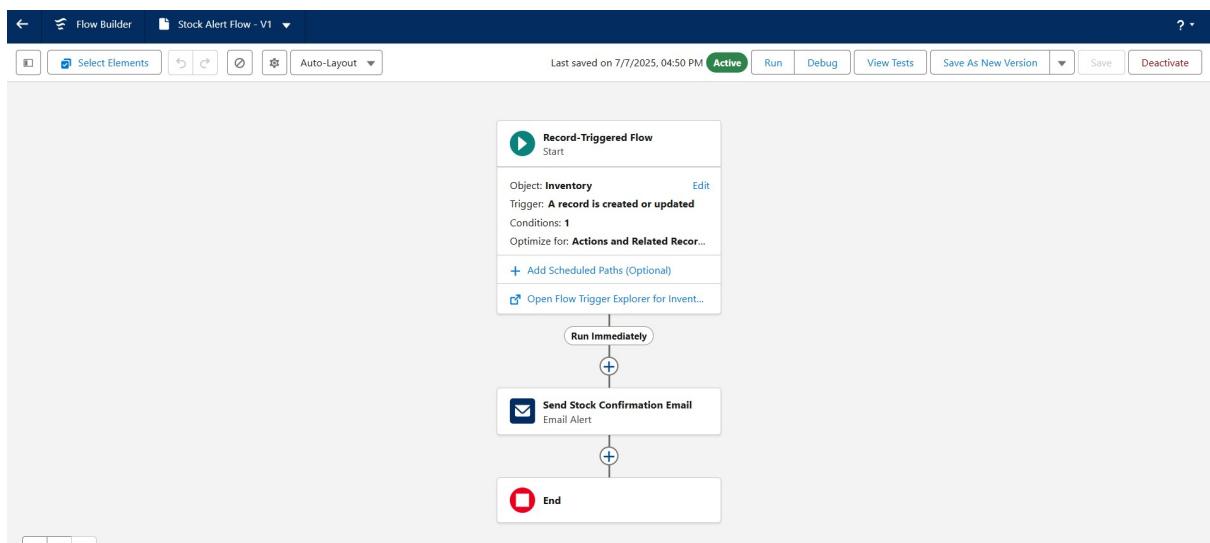
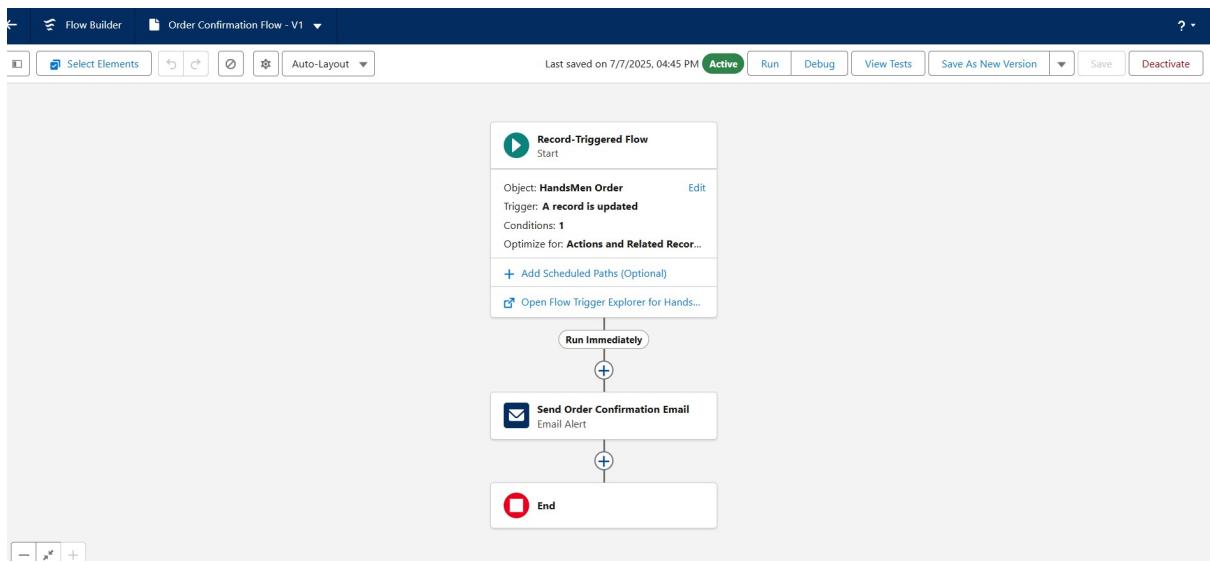
Dear shyam,

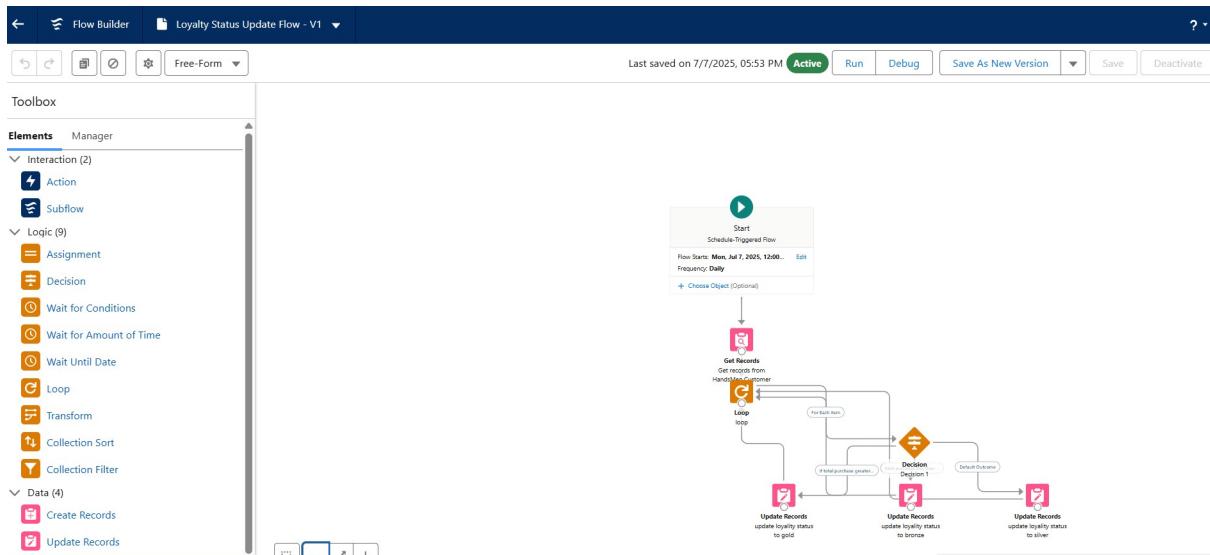
Your order #O-0008 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team





Create Apex Class:

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

Overview Workspace K

Create Apex Class

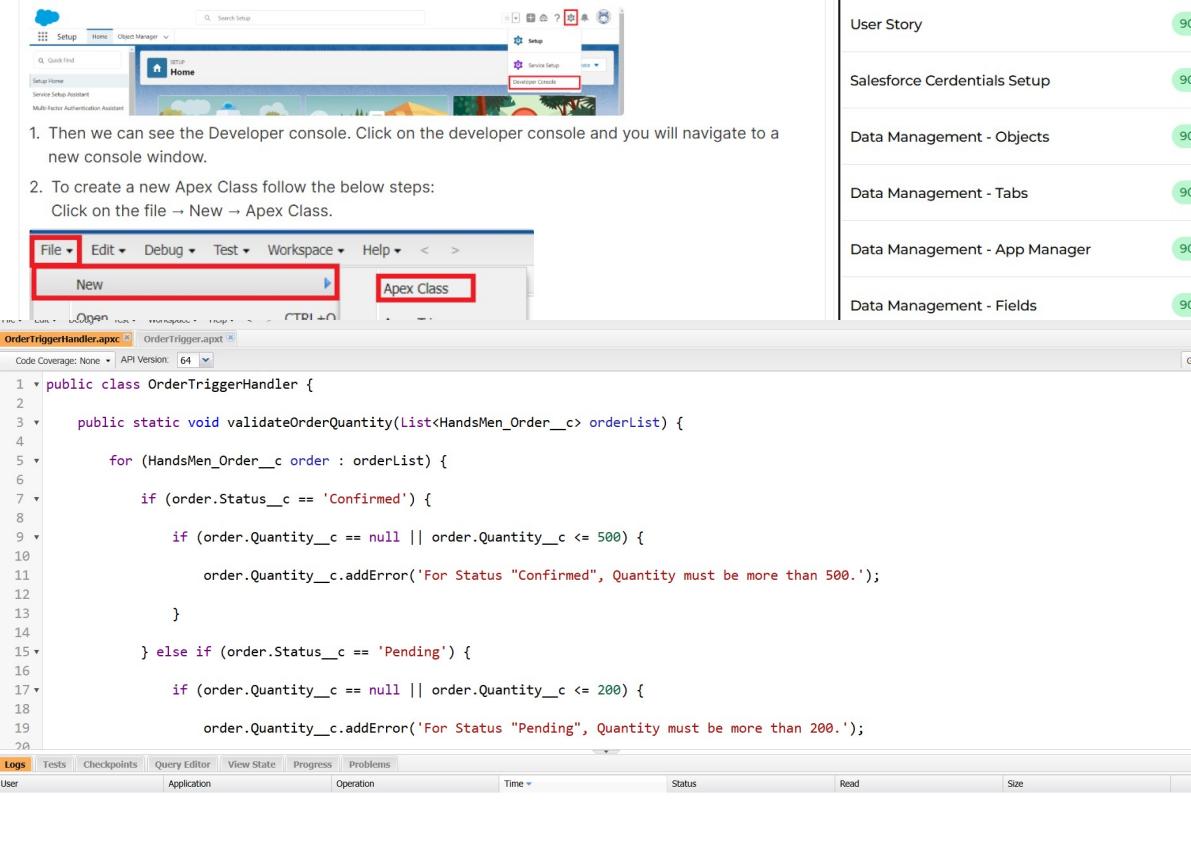
Story Duration: 45m Review

T. Assigned to T. Shyam Kumar

Description

Create an Apex Class

1. Go to Setup → Click on the gear icon → Select Developer Console.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. To create a new Apex Class follow the below steps:
Click on the file → New → Apex Class.



```
public class OrderTriggerHandler {  
    public static void validateOrderQuantity(List<HandsMen_Order__c> orderList) {  
        for (HandsMen_Order__c order : orderList) {  
            if (order.Status__c == 'Confirmed') {  
                if (order.Quantity__c == null || order.Quantity__c <= 500) {  
                    order.Quantity__c.addError('For Status "Confirmed", Quantity must be more than 500.');//  
                }  
            } else if (order.Status__c == 'Pending') {  
                if (order.Quantity__c == null || order.Quantity__c <= 200) {  
                    order.Quantity__c.addError('For Status "Pending", Quantity must be more than 200.');//  
                }  
            }  
        }  
    }  
}
```

Project Progress

Task	Progress
Use Case	90%
User Story	90%
Salesforce Credentials Setup	90%
Data Management - Objects	90%
Data Management - Tabs	90%
Data Management - App Manager	90%
Data Management - Fields	90%

Code Editor

```
trigger OrderTrigger on HandsMen_Order__c (before insert, before update) {  
    if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {  
        OrderTriggerHandler.validateOrderQuantity(Trigger.new);  
    }  
}
```

Create Batch Apex:

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

Overview Workspace Kanban

Create Batch Apex

Story Duration: 45m

T. Assigned to T. Shyam Kumar

Description

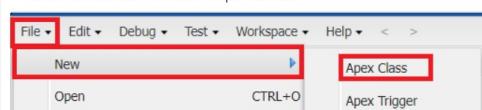
Create an Apex Class

1. Go to Setup → Click on the gear icon → Select Developer Console.



1. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.

2. To create a new Apex Class follow the below steps:
Click on the file → New → Apex Class.



Project Details Comments

Project Progress

Use Case	90%
User Story	90%
Salesforce Credentials Setup	90%
Data Management - Objects	90%
Data Management - Tabs	90%
Data Management - App Manager	90%
Data Management - Fields	90%

```
InventoryBatchJob.apxc *
Code Coverage: None API Version: 64
1 global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {
2     global Database.QueryLocator start(Database.BatchableContext BC) {
3         return Database.getQueryLocator(
4             'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'
5         );
6     }
7     global void execute(Database.BatchableContext BC, List<SObject> records) {
8         List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
9         for (SObject record : records) {
10             HandsMen_Product__c product = (HandsMen_Product__c) record;
11             product.Stock_Quantity__c += 50; // Restock logic
12             productsToUpdate.add(product);
13         }
14         if (!productsToUpdate.isEmpty()) {
15             try {
16                 update productsToUpdate;
17             } catch (DmlException e) {
18                 System.debug('Error updating inventory: ' + e.getMessage());
19             }
20         }
}
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read
```

Enter Apex Code

```
1 System.schedule('Daily Inventory Sync', '0 0 0 * * ?', new InventoryB
```

base
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Progress Problems 2

Operation Time Status Read Size

Open Log Execute Execute Highlighted

Output of Batch Apex:

Q sched

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.

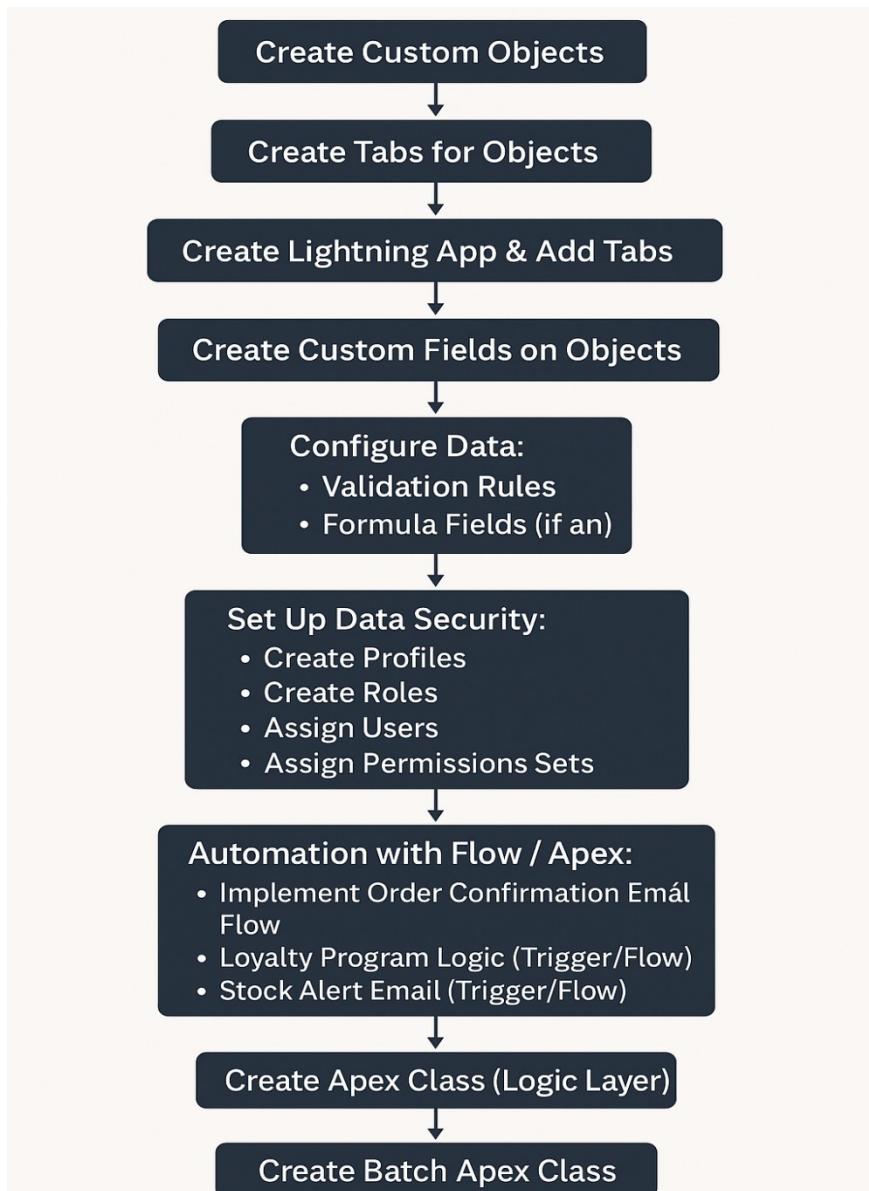
Percentage of Scheduled Jobs Used: 1% You have currently used 1 scheduled Apex jobs out of an allowed organization limit of 100 active or scheduled jobs. To learn about how this limit is calculated and what contributes to it see the [Lightning Platform Apex Limits](#) topic.

View: All Scheduled Jobs Create New View

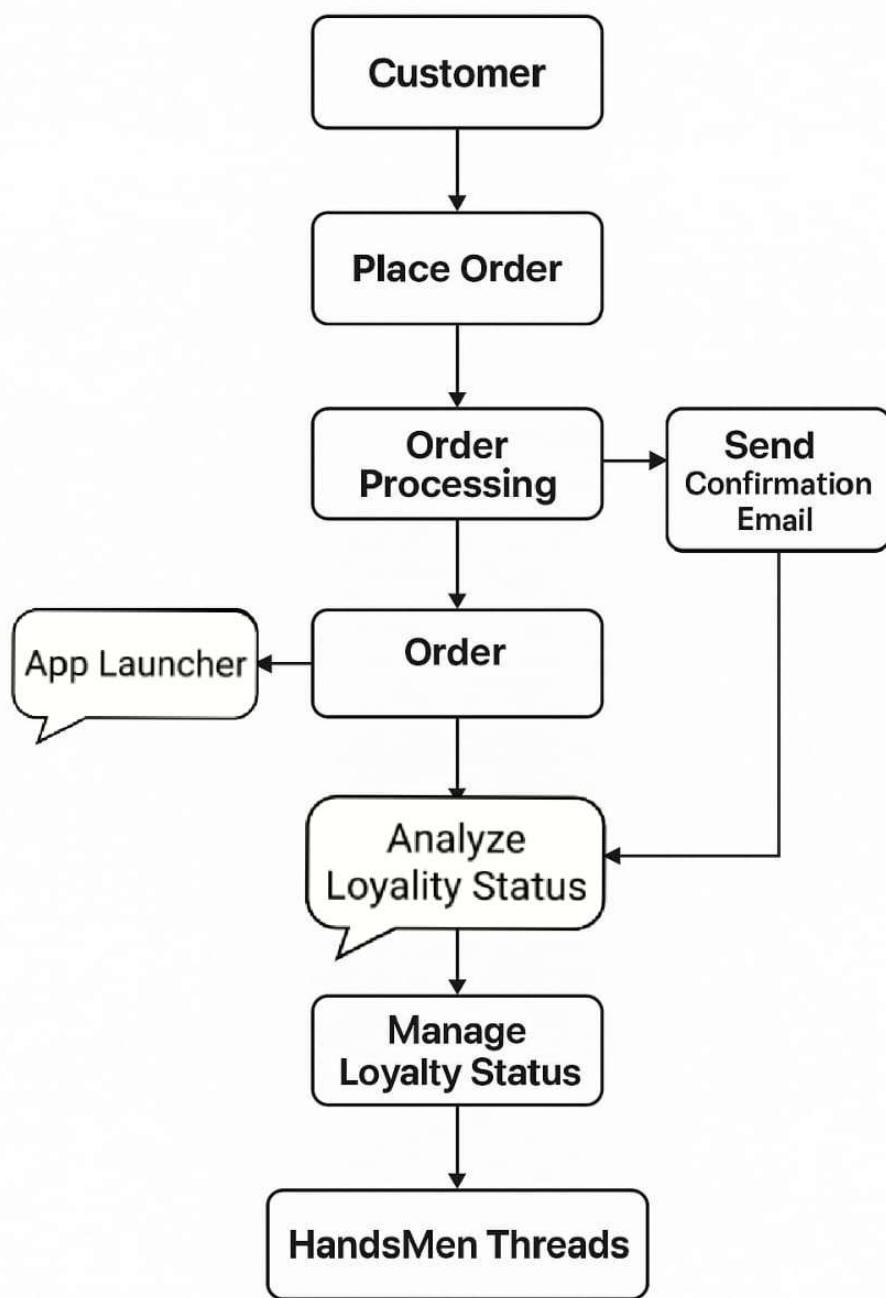
Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type	Cron Trigger ID
Manage Del Pause Job	Daily Inventory Sync	kumar.shyam	7/7/2025, 5:27 AM	7/8/2025, 12:00 AM	7/9/2025, 12:00 AM	Scheduled Apex	08egl.000006wyf5
Del	Loyalty_Status_Update_Flow-1	kumar.shyam	7/7/2025, 5:23 AM	7/8/2025, 12:01 AM	7/9/2025, 12:00 AM	Scheduled Flow	08egl.000006wIDA
Del	Metalytics Data Loader Job for Org : 00DgL000006Y32	User_Integration	6/30/2025, 12:51 AM	7/7/2025, 3:10 AM	7/8/2025, 3:10 AM	Autonomous Data Loader Job	08egl.000006ibld
	Program Milestone Computation Cron Job	Process, Automated	6/30/2025, 12:50 AM	7/8/2025, 12:00 AM	7/8/2025, 6:59 AM	Program Milestone Computation Cron Job	08egl.000006iblb
	Program Status Update Cron Job	Process, Automated	6/30/2025, 12:50 AM	7/7/2025, 8:00 PM	7/8/2025, 5:00 AM	Program Status Update Cron Job	08egl.000006iblc

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

Flow chart of the project:



Flow from Customer viewpoint:



Conclusion:

The Salesforce implementation for HandsMen Threads successfully transformed the organization's customer relationship management and operational workflows. By leveraging the power of Salesforce's automation tools, custom objects, and robust data management capabilities, the project achieved its key goals: enhancing customer engagement, ensuring inventory accuracy, and streamlining internal processes.

With automated order confirmations, real-time stock alerts, a dynamic loyalty program, and daily batch processing, the system now supports smarter decision-making and proactive customer service. The project not only modernized the company's CRM approach but also laid the foundation for scalable and efficient growth in the highly competitive fashion industry.

This initiative demonstrates the strategic value of Salesforce in building a connected, automated, and customer-centric business environment.