

HandsMen Threads

A forward-thinking fashion brand.

Abstract:

HandsMen Threads, a forward-thinking fashion industry organization, is transforming its business operations through Salesforce. This project centers around developing a robust and scalable data model using custom Salesforce features to streamline order management, customer engagement, inventory tracking, and marketing campaigns. By leveraging automation, validation, and Apex logic, the solution aims to increase operational efficiency, ensure data integrity, and enhance customer satisfaction.

Objective

The primary goal of this project is to create a data-driven Salesforce application for:

- Automating order confirmations and updates
- Managing inventory and preventing stockouts
- Running marketing campaigns
- Maintaining accurate customer and order data
- Implementing loyalty rewards programs
- Ensuring data quality through validation rules

Technology Description

Salesforce is a powerful cloud-based CRM platform used for managing customer relationships and business processes. This project utilizes several core Salesforce technologies:

Data Modelling: Using Custom Objects to represent key entities such as Orders, Customers, Inventory, and Campaigns.

Lightning App Builder: To create an intuitive user interface for data interaction.

Flows: For automation like sending emails and updating records.

Apex & Triggers: For complex logic and scheduled automation.

Validation Rules: To maintain data integrity from the UI.

Permission Sets: For secure access control.

Email Templates: For consistent, automated communications.

Custom Objects:

HandsMen_Customer__c: Stores customer details like name, email, loyalty status.

HandsMen_Order__c: Contains order records including order date, items, total amount.

HandsMen Product__c: Represents the product catalog of HandsMen Threads, capturing essential product details such as name, category, price, and availability, and used for inventory tracking and order processing.

Inventory__c: Tracks stock items and quantity.

Marketing_Campaign__c: Used for promotions and campaigns data.

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

HandsMen Product

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

Fields & Relationships

8 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) | | |
| HandsMen Product Name | Name | Text(80) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| order | order__c | Lookup(HandsMen Order) | | ✓ |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Price | Price__c | Currency(18, 0) | | |
| SKU | SKU__c | Text(60) | | |
| Stock Quantity | Stock_Quantity__c | Number(18, 0) | | |

SETUP > OBJECT MANAGER

HandsMen Customer

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

Fields & Relationships

11 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) | | |
| Email | Email__c | Email | | |
| FirstName | FirstName__c | Text(50) | | |
| FullName | FullName__c | Formula (Text) | | |
| HandsMen Customer Name | Name | Text(80) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| LastName | LastName__c | Text(50) | | |
| Loyalty Status | Loyalty_Status__c | Picklist | | |
| Owner | OwnerId | Lookup(User,Group) | | |
| Phone | Phone__c | Phone | | |
| Total Purchases | Total_Purchases__c | Number(18, 0) | | |

SETUP > OBJECT MANAGER

Marketing Campaign

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

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) | | |
| End Date | End_Date__c | Date | | |
| HandsMen Customer | HandsMen_Customer__c | Lookup(HandsMen Customer) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Marketing Campaign Name | Name | Auto Number | | |
| Owner | OwnerId | Lookup(User,Group) | | |
| Start Date | Start_Date__c | Date | | |

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

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

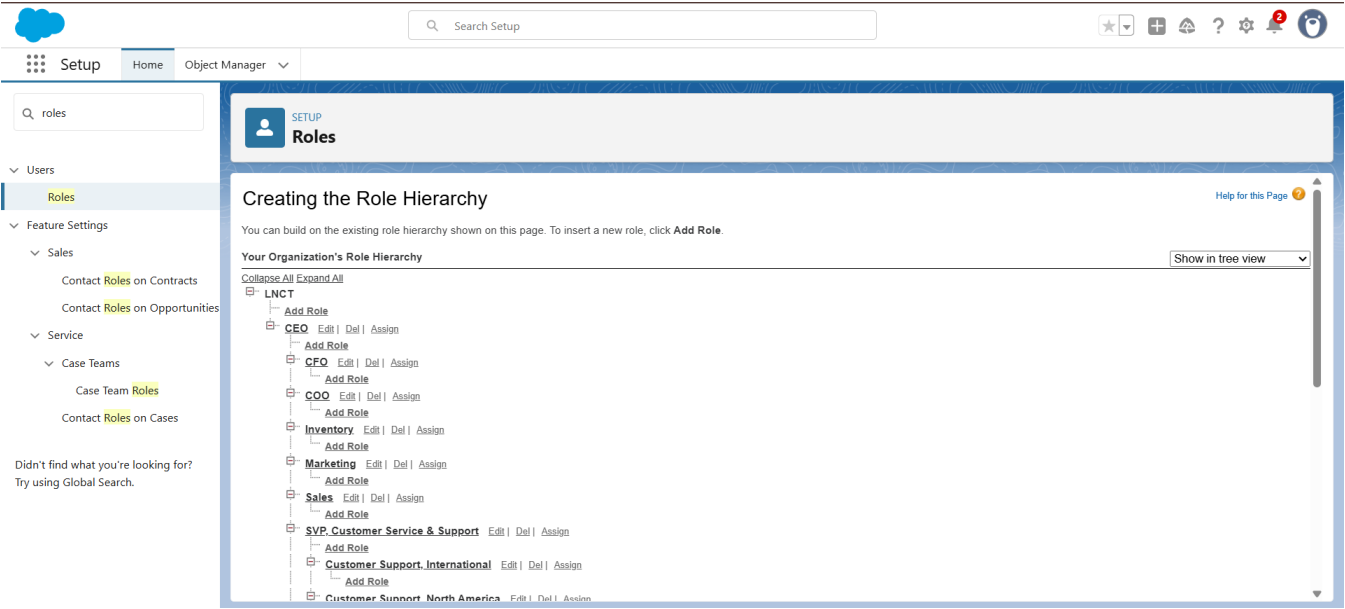
Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|---------------------|---------------------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| HandsMen Product | HandsMen_Product__c | Master-Detail(HandsMen Product) | | |
| Inventory Number | Name | Auto Number | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Stock Quantity | Stock_Quantity__c | Number(18, 0) | | |
| Stock Status | Stock_Status__c | Formula (Text) | | |
| Warehouse | Warehouse__c | Text(50) | | |

Tabs, Roles, and Permission Sets

Custom Tabs: Created for all major objects (Customer, Order, Inventory, Campaign)
Roles:

- Admin (full access)
- Warehouse Manager (read/write Inventory, Orders)
- Marketing Executive (read/write Campaigns, view Customers)



Permission Sets:

Warehouse_Update_Inventory

Marketing_Access

Order_Management

Validation Rules

- Inventory__c
 - Rule Name: Stock_Quantity_Validation
 - Formula: Stock_Quantity__c < 0
 - Error Message: “Inventory count cannot be less than zero.”

Setup

Home

Object Manager

Search Setup

Inventory

Validation Rules

1 Items. Sorted by Rule Name

| RULE NAME | ERROR LOCATION | ERROR MESSAGE | ACTIVE | MODIFIED BY |
|----------------|----------------|--|--------|---|
| Stock_Quantity | Top of Page | the inventory count is never less than zero. | ✓ | Yashraj Chakrawarti, 7/30/2025, 3:50 AM |

2. HandsMen_Customer__c Rule Name: Valid_Gmail_Email
- Formula: NOT(REGEX(Email, "[a-zA-Z0-9._%+-]+@gmail\.com\$"))
- Error Message: “Please enter a valid Gmail address.”

Setup

Home

Object Manager

Search Setup

HandsMen Customer

Validation Rules

1 Items. Sorted by Rule Name

| RULE NAME | ERROR LOCATION | ERROR MESSAGE | ACTIVE | MODIFIED BY |
|-----------|----------------|---------------------------|--------|---|
| Email | Top of Page | Please fill Correct Gmail | ✓ | Yashraj Chakrawarti, 7/30/2025, 3:51 AM |

3. HandsMen_Order__c

Error Message: "Please enter a valid order amount."

1. Order Confirmation Template: Sent after each order is placed.

Setup

Home

Object Manager

Email

Apex Exception Email

Authorized Email Domains

Classic Email Templates

Classic Letterheads

Compliance BCC Email

DKIM Keys

Delete Attachments Sent as Links

Deliverability

Email Address

Internationalization

Email Attachments

Email Delivery Settings

Email Domain Filters

Email Relays

Email Footers

Email to Salesforce

Enhanced Email

Filter Email Tracking

Email Integration and Sync

SETUP

Classic Email Templates

HTML Email Template

Order_Confirmation_Email

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

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 | HandsMen.Threads | Times Used | |
| Email Layout | Free Form Letter | | |
| Encoding | Unicode (UTF-8) | | |
| Author | Yashraj Chakrawarti [Change] | | |
| Description | | | |
| Created By | Yashraj Chakrawarti | Modified By | Yashraj Chakrawarti |
| | 7/30/2025, 6:32 AM | | 7/30/2025, 6:32 AM |

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Email Template

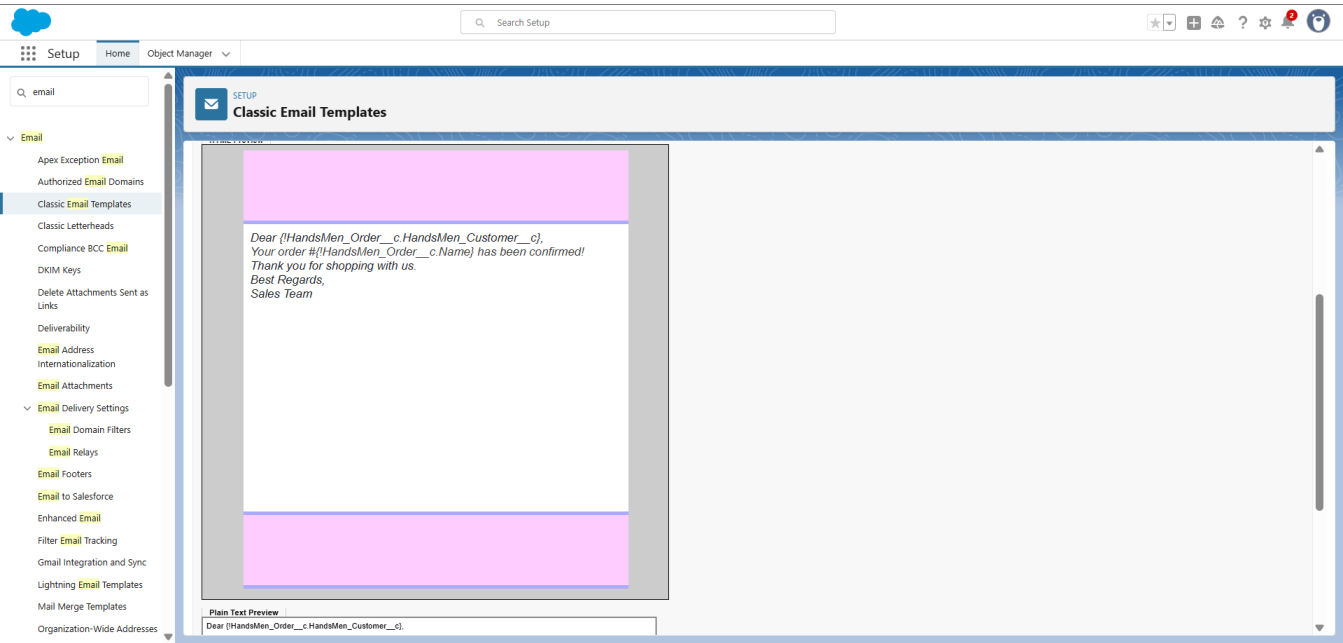
[Send Text and Verify Merge Fields](#)

Subject

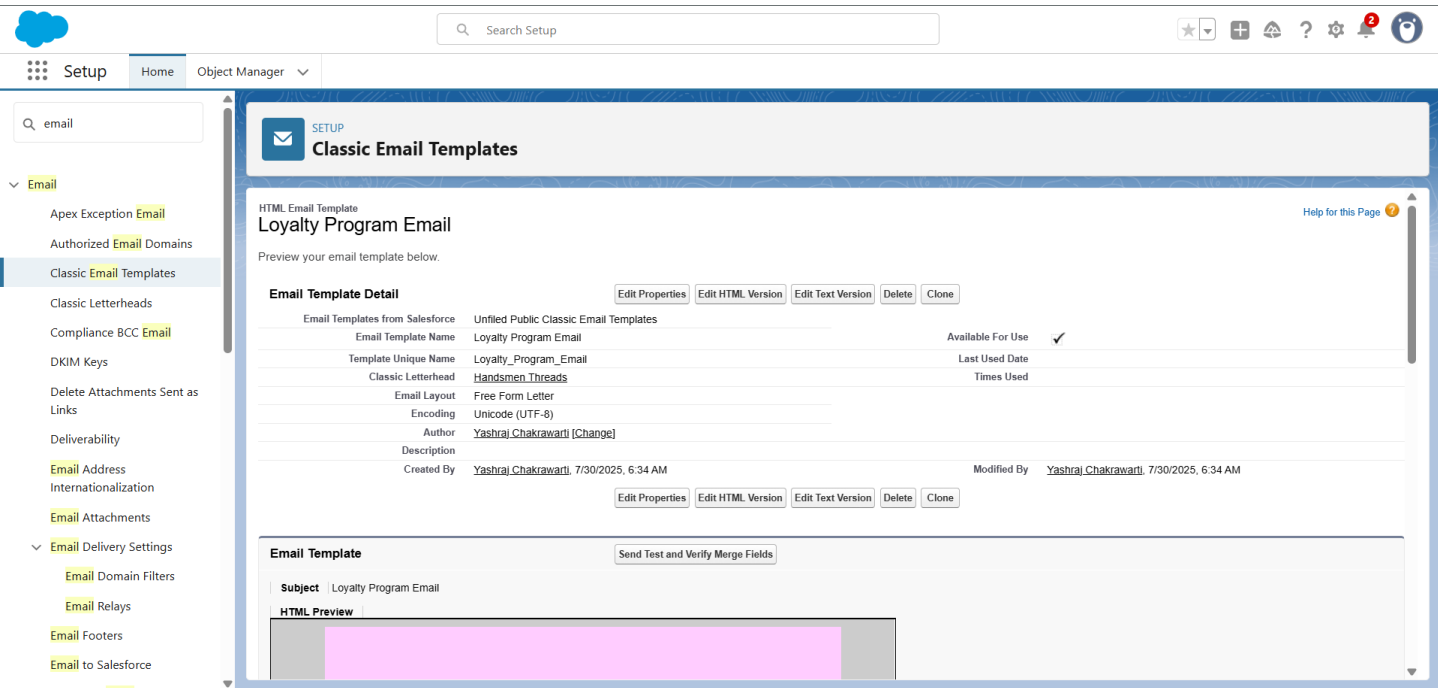
Your Order has been Confirmed!

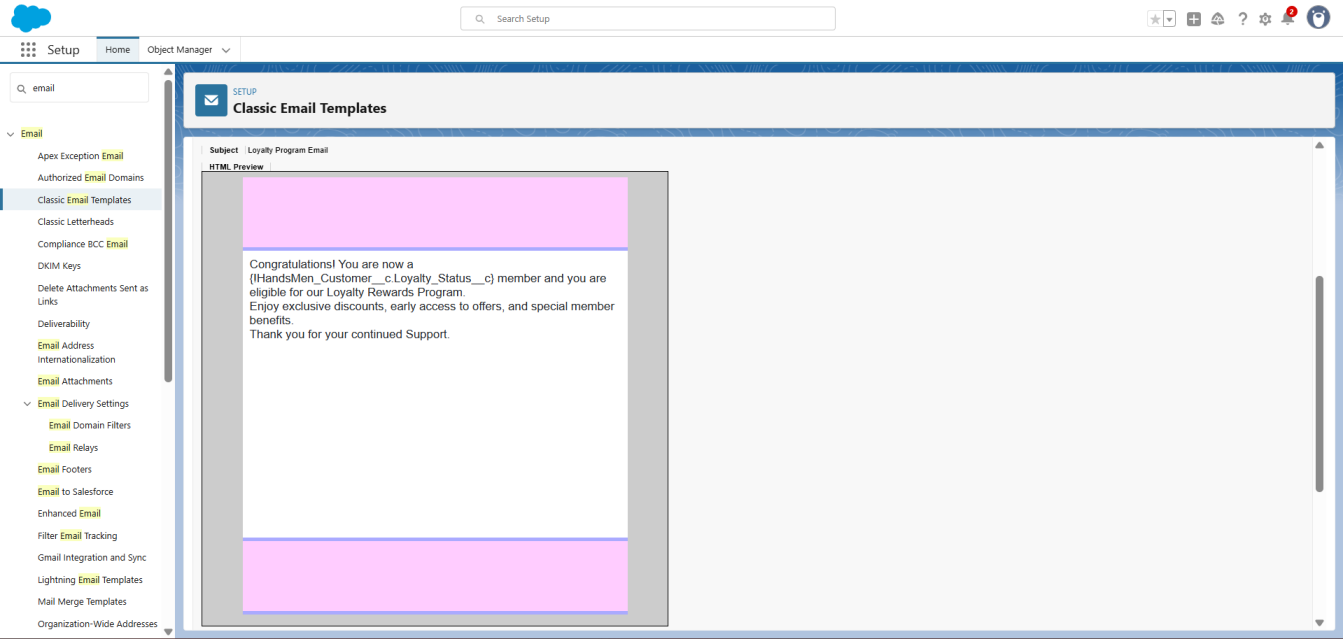
HTML Preview

Dear {!HandsMen_Order__c.HandsMen_Customer__c},

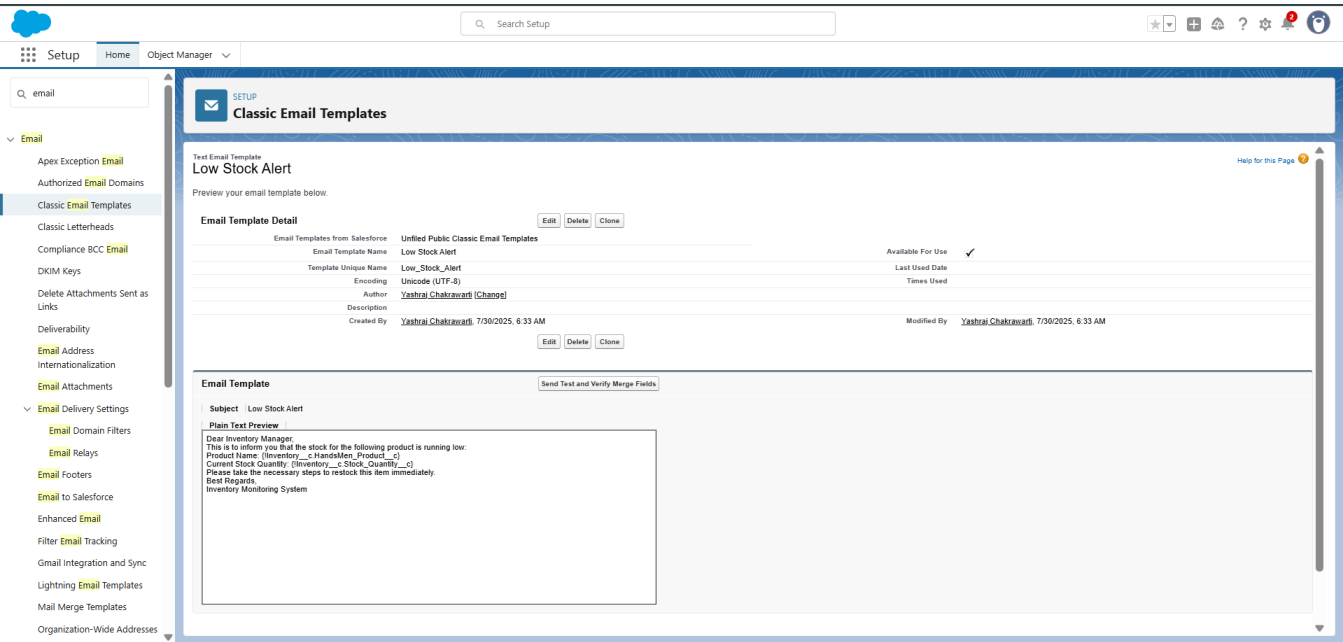


2.Loyalty Program Update:Sent when loyalty status changes.



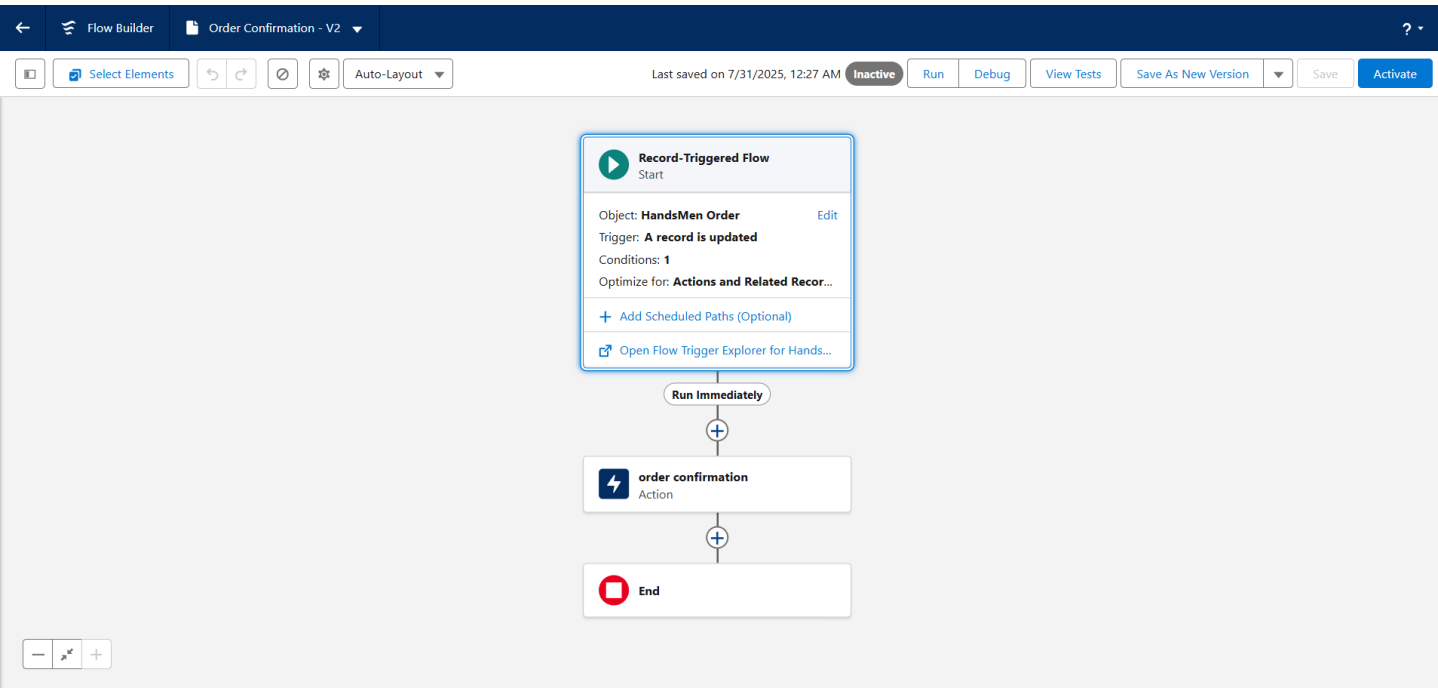
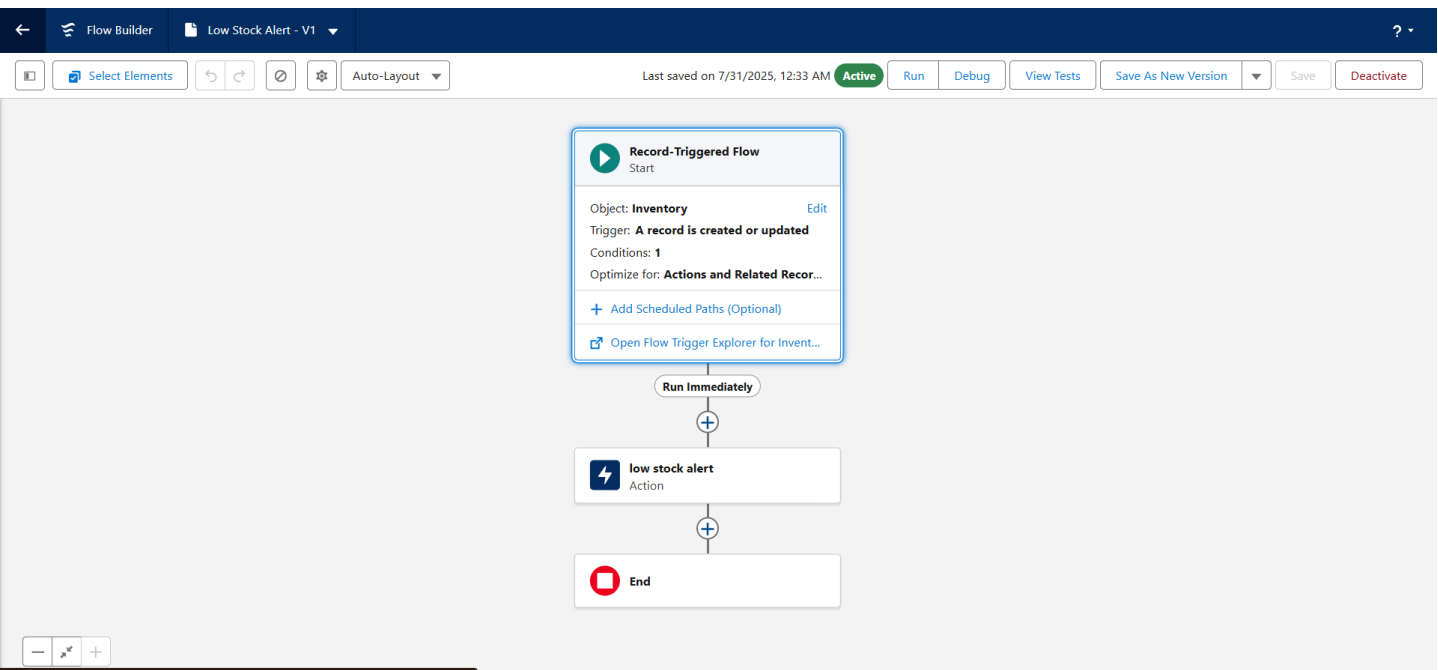


3. Stock Alert Email: Sent to warehouse when inventory < 5.



Flows and Apex Automation

Flows Used:



Flow Builder

Loyalty Status Update Flow - V1

Debug Run: Loyalty Status Update Flow 31/07/2025, 00:49

Completed

← ↻ ⌂

Edit Flow Debug Again Save As New Version Save Deactivate

Wed, Jul 30, 2025, 12:00:00 AM, Once Start

Get customers Get Records

loop through record Loop

For Each

loyalty status check Decision

Gold

update to gold Update Records

Bronze

update to bronze Update Records

Silver

update to silver Update Records

loyalty program Email Alert

End

After Last

Debug Details

Expand All Basic Debug Log

Search this list...

How the Interview Started

This flow was scheduled to start at 12:00 AM Jul 30, 2025.

Details

Get Records: Get customers

One or more HandsMen_Customer_c records were retrieved.

Details

Loop: loop through record

Iteration 0 of the loop through the Get_customers collection occurred.

Details

Decision: loyalty status check

Record-Triggered Flow: Sends order confirmation email upon record creation.

Scheduled Flow: Processes bulk orders at midnight.

Flow for Loyalty Update: Changes Loyalty_Status__c based on total purchases.

Apex Trigger on Order to update inventory.

Batch Apex for scheduled financial and stock update.

Future Method for sending asynchronous emails.

Execution Phases

1.Developer Org Setup

Created a new Salesforce Developer Org for HandsMen Threads.

2.App Setup

Created “HandsMen Threads App” using Lightning App Builder.

3.Added custom tabs and navigation.

Data Model Creation

4.Defined and related custom objects.

Created necessary fields and relationships.

5.Validation & Automation

Implemented validation rules.

6.Created flows and Apex triggers. UI

& UX Enhancement

Used Lightning pages and component visibility filters.

Real World Scenario Demonstration

A user logs in and places an order.

The stock updates and customer receives an email.

The loyalty program updates automatically.

Warehouse is alerted if stock is low.

Daily bulk order updates run every midnight.

Real-World Example

Imagine Priya, a loyal customer, orders 10 dresses. The system:

Validates her Gmail address.

Deducts 10 units from the dress inventory.

Sends Priya a confirmation email.

Checks her purchase history and upgrades her loyalty tier.

If the inventory drops below 5, the warehouse is notified.

Conclusion

The HandsMen Threads Salesforce implementation exemplifies how businesses can leverage cloud CRM solutions to automate workflows, ensure data quality, and enhance customer engagement. Through effective use of Flows, Apex, and validations, the project ensures smooth operations and reliable data handling, setting a standard for scalable CRM-based transformation in the fashion industry.