

Internship Project Report

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ABSTRACT

The *HandsMen Threads* Salesforce implementation project marks a transformative step in enhancing operational efficiency and customer engagement for the organization. As a premium brand in men's fashion, HandsMen Threads is committed to elevating the sophistication of its internal systems to match the quality of its offerings. This project centers around the design and deployment of a robust, scalable data model that supports seamless information flow across departments while maintaining data integrity directly from the user interface.

Key enhancements include automated order confirmations, a dynamic loyalty program, proactive stock alerts, and scheduled bulk order processing. These features are tailored to improve customer satisfaction, optimize inventory management, and support data-driven decision-making.

Through this project, participants will gain hands-on experience in critical Salesforce skills such as data modeling, ensuring data quality, building applications with Lightning App Builder, and developing record-triggered flows. Additionally, the project will cover advanced topics including Apex programming, Apex triggers, and asynchronous Apex processes—preparing individuals to build intelligent, automated, and scalable CRM solutions.

OBJECTIVE

The main objective of this project is to develop & implement a customized Salesforce CRM solution for HandsMen Threads to streamline core business operations, maintain data integrity and enhance customer satisfaction.

By building a centralized system to manage customers, orders, products, inventory and marketing campaigns, the project aims to:

- **Automate key processes** such as order confirmation, loyalty status updates, and stock alerts.
- **Ensure accurate and consistent data** entry using validation rules.
- **Enable real-time visibility** of inventory and customer interactions.
- **Improve internal team coordination** through role-based access control.

- **Deliver personalized customer experiences** through targeted communication and loyalty programs.

TECHNOLOGY DESCRIPTION

Salesforce:

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer data, automate processes and improve service, marketing and sales operations. It provides point and click tools as well as programmatic capabilities (like apex & flows) to build custom business solutions.

Custom Objects:

Objects in Salesforce are like tables in a database. Custom objects are created to store specific data.

- Customer__c – Stores customer info
- Product__c – Stores product details
- Order__c – Stores orders

Tabs:

Tabs are used to display object data in the Salesforce UI.

Example: A tab for Product__c allow users to easily view & manage products.

Custom App:

An app in Salesforce is a collection of tabs grouped together for a specific business purpose.

Profiles:

Profiles define what user can see, do & edit in Salesforce. It controls object permissions, field access and more.

Roles:

It controls the data visibility in Salesforce role hierarchy. It's used for sharing settings and reporting.

Permission Sets:

Permission Sets grant additional permissions to users without changing their profile.

Validation Rules:

It ensures that data entered meets business criteria.

Example:

- Email must contain @gmail.com
- Stock can't be negative

Email Alerts:

Email Alerts are actions in Flows or Workflow Rules that send emails using predefined templates.

Example: When a loyalty level changes, an email is sent to the customer.

Flows:

It automates business logic without code. They can create, update or send notifications.

Example: Flow triggers email alerts on new order

Apex:

Apex is a Salesforce object-oriented programming language. It allows developers to write custom logic.

Example Triggers:

- Update Total_Amount__c in orders

- Reduce inventory stock

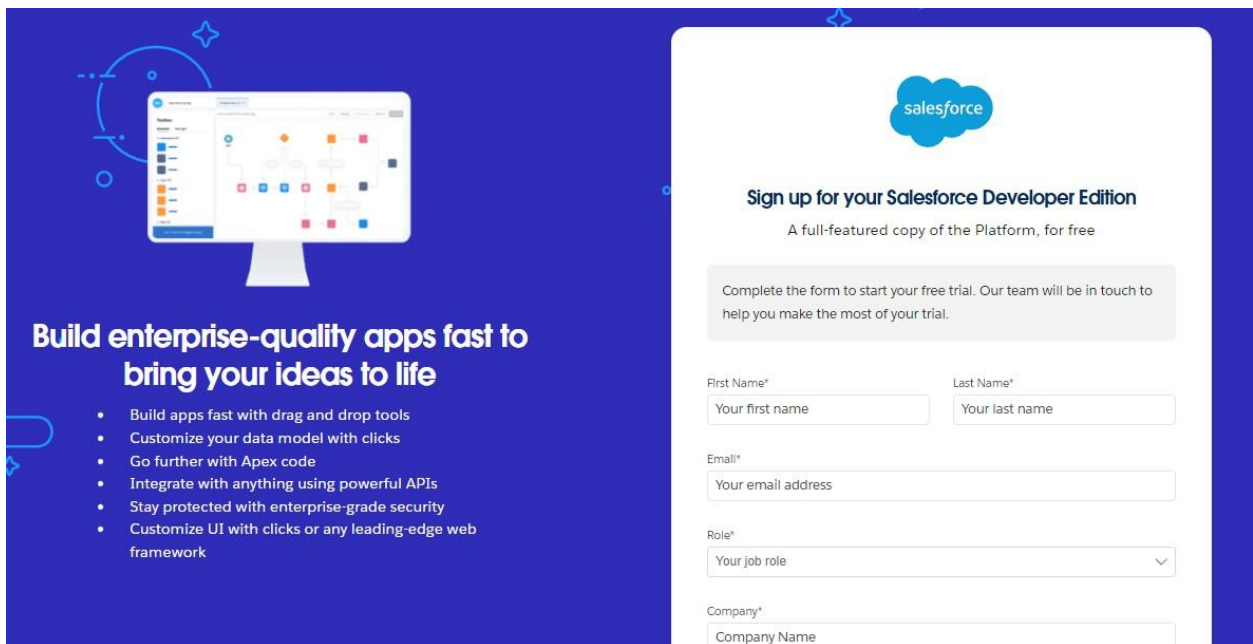
DETAILED EXECUTION OF PROJECT PHASES

1. Developer Org Setup

- A Salesforce Developer Org was created using

<https://developer.salesforce.com/signup>

- The Account was verified, password set and access was granted to the Salesforce Setup Page.



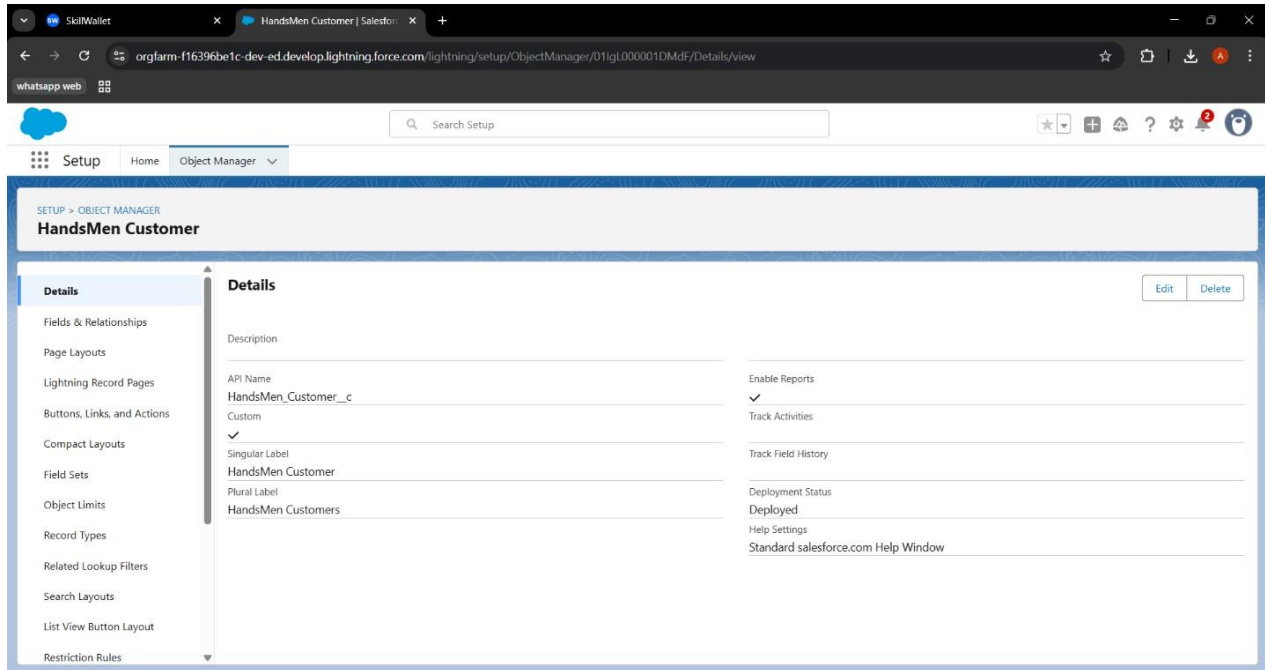
2. Custom Object Creation

Five custom objects were created to store business-critical data:

- **HandsMen Customer:** Stores customer info like email, phone, loyalty status.
- **HandsMen Product:** Stores product catalog details like SKU, price and stock.
- **HandsMen Order:** Stores orders placed by customers including quantity & status.
- **Inventory:** Tracks stock quantity and warehouse location.
- **Marketing Campaign:** Stores promotional campaigns and scheduling.

Steps followed:

- Navigate to Setup ➡ Object Manager ➡ Create ➡ Custom Object
- Provided label, name, and enabled reports/serach
- Save and create tabs for each object



3. Create the Lightning App

- A custom Lightning App named HandsMen Threads was created.
- Included tabs: HandsMen Customer, Order, Product, Inventory, Campaigns, Rpeorts etc.
- Assigned to the System Administrator profile.

4. Validation Rules

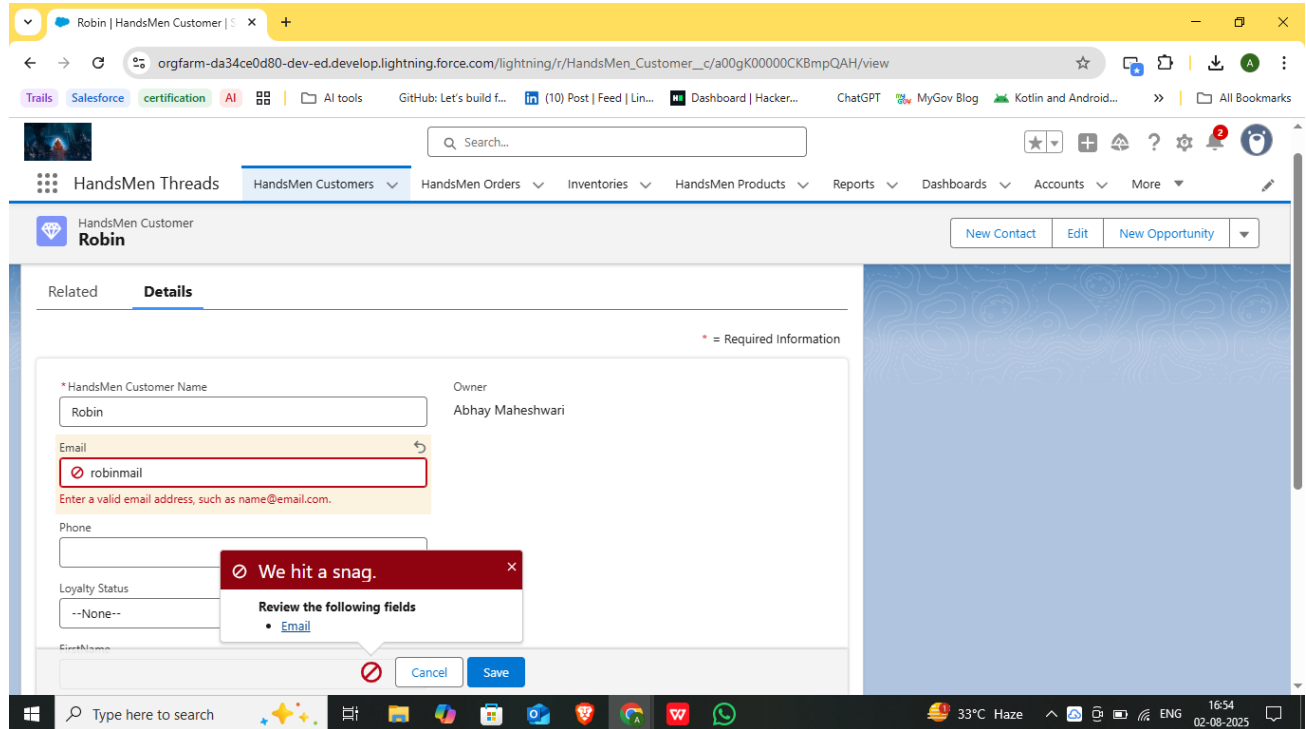
To ensure accurate data entry and enforce business logic, the following validation rules were applied:

- **Order Object:** Prevents saving if Total_Amount__c <= 0.

Error: "Please Enter Correct Amount"

- **Customer Object:** Validates email contains @gmail.com.

Error: “Please Fill Correct Gmail”



5. User Role & Profile Setup

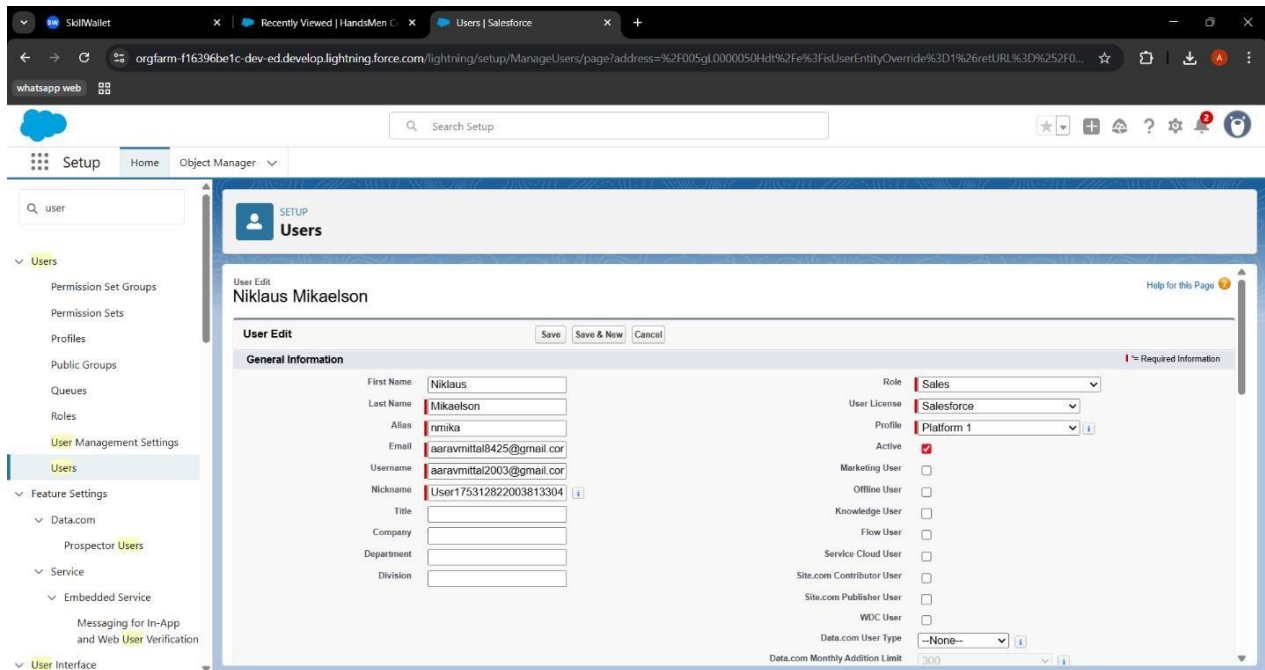
- Cloned the Standard User profile to a new profile named Platform1 and added access to necessary custom objects.
- Created Roles for different departments:
 - Sales Manager, Inventory Manager, Marketing Team

6. User Creation

Users were created in Salesforce and assigned appropriate roles and profiles to reflect their responsibilities:

- Niklaus Mikaelson – Assigned the Sales role

- Kol Mikaelson – Assigned the Inventory role
- These role based assignments help enforce proper data access and process control within the system.



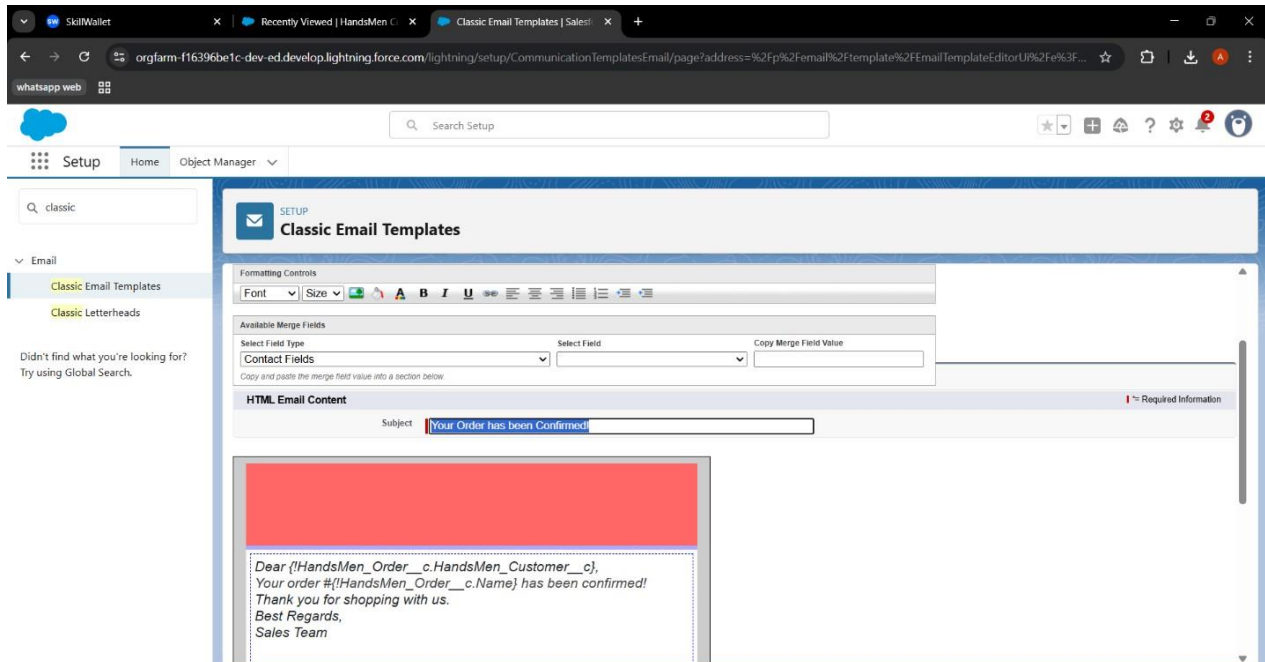
The screenshot shows the Salesforce 'User Edit' page for a user named Niklaus Mikaelson. The page is divided into two main sections: 'General Information' and 'Permissions'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Permissions' section includes fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, and Data.com Monthly Addition Limit. The user is currently assigned the 'Sales' role, 'Salesforce' user license, and 'Platform 1' profile. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Data.com User Type' is set to 'None'. The 'Data.com Monthly Addition Limit' is set to 300.

7. Email Template & Alerts

Created three email templates:

- Order Confirmation – Set an order status = Confirmed
- Low Stock Alert – Sent when Inventory < 5 units
- Loyalty Program Email – Sent when loyalty status changes

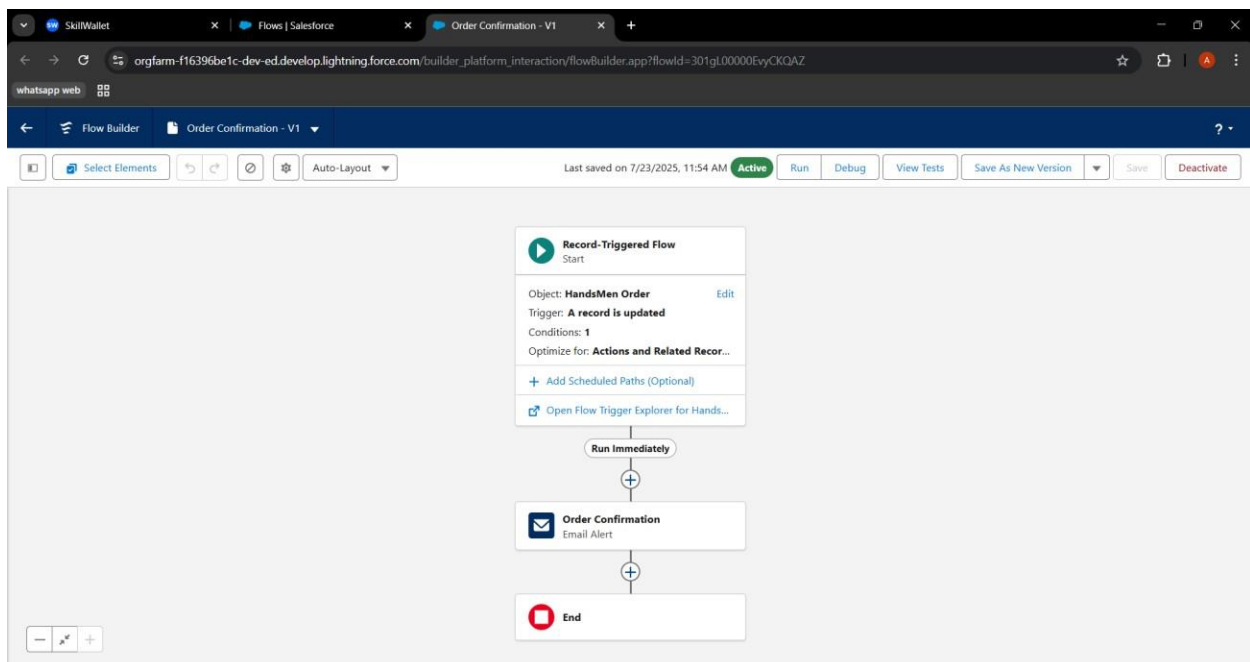
Corresponding Email Alerts were created using these templates and linked to automation flows.



8. Flow Implementation

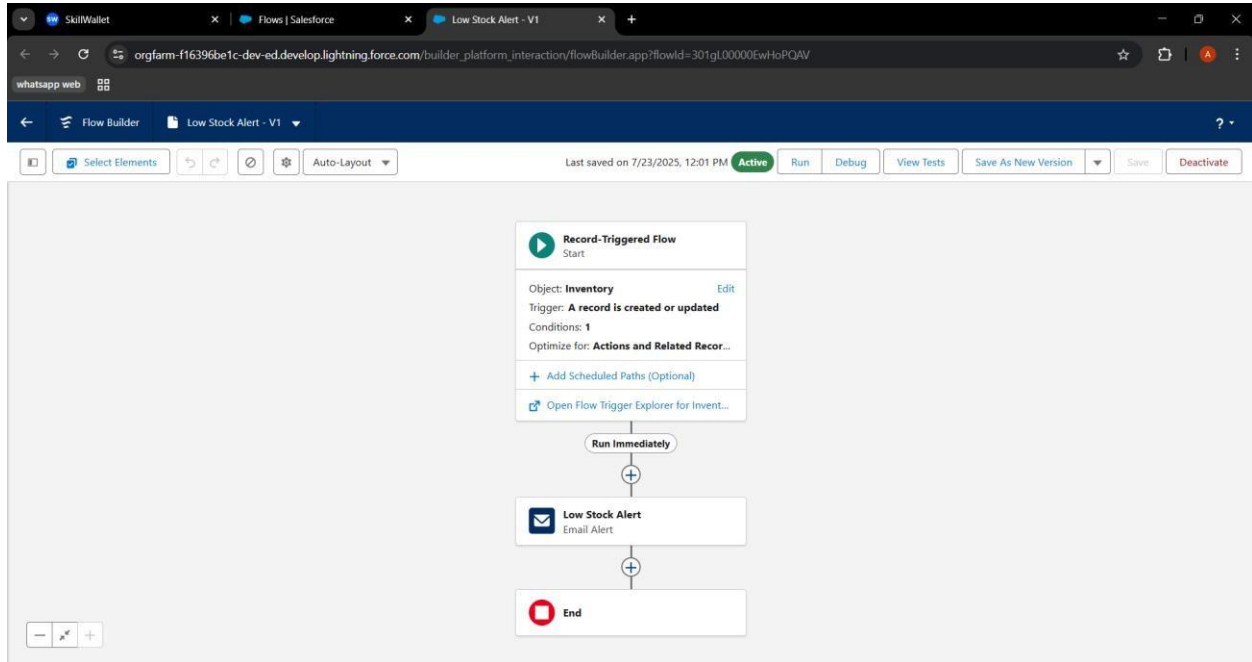
a. Order Confirmation flow

- Triggered when an order is updated to Confirmed.
- Sends an Order Confirmation email to the related customer.



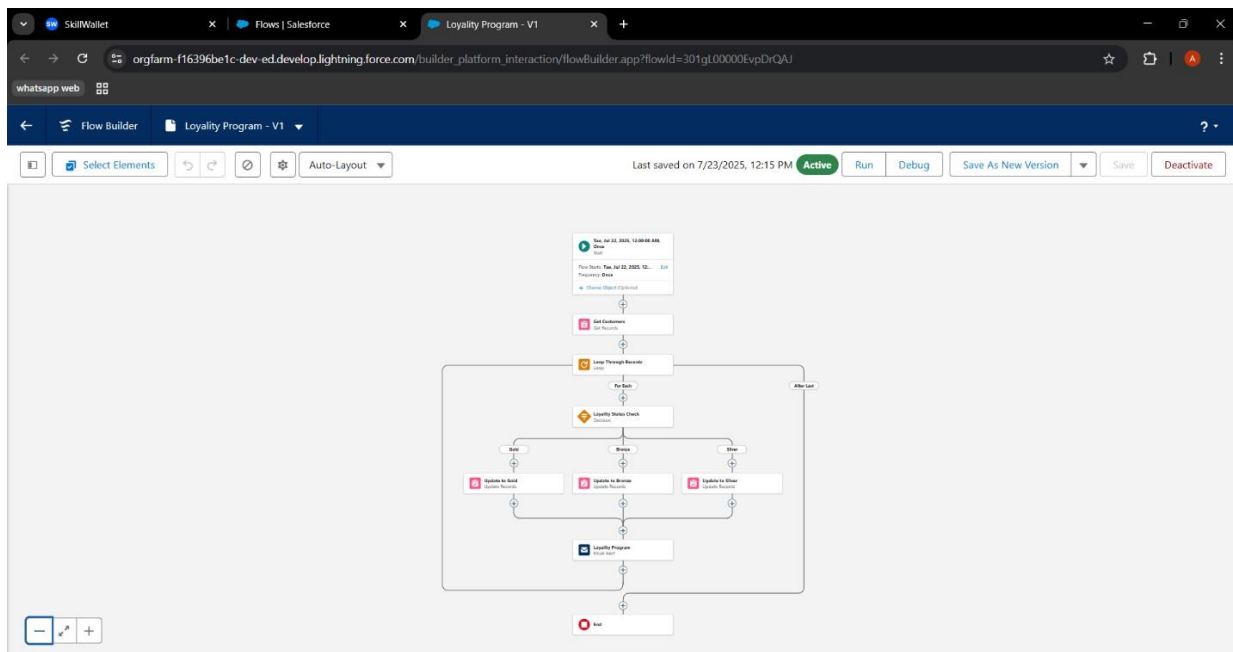
b. Stock Alert Flow

- Triggered when Inventory stock drops below 5.
- Sends Low Stock email to Inventory Manager.



c. Scheduled Flow: Loyalty Update

- Runs daily at midnight.
- Loops through customers and updates their Loyalty Status based on total purchases.



9. Apex Triggers

- **Order Total Trigger:** Auto-calculates Total Amount based on quantity and unit price.
- **Stock Deduction Trigger:** Reduces stock when an order is placed.
- **Loyalty Status Trigger:** Updates Loyalty Status based on total purchases.

PROJECT EXPLANATION WITH REAL WORLD EXAMPLE

Let's walk through it like a real customer interaction

1. Customer Registration

- A customer, Elijah Mikaelson, visits the store or website.
- In Salesforce: A record is created in the Customer object with his name, phone, email, etc.
- Validation Rule: Ensures the email is valid (e.g., must contain@gmail.com).

2. Product Step

- The admin add products like shirts, jeans, etc., into the Product__c object.
- Each product has a price and other details.
- Inventory is also created to manage stock for these products.

3. Order Placement

- Elijah decides to buy 2 shirts (each ₹500). An order is placed.
- In Salesforce: A new order is created.
- Apex Trigger: Automatically calculates Total_Amount__c = 2 x 500 = ₹1000.

4. Inventory Update

As soon as the order is placed:

- Apex Trigger on Inventory: Reduces shirt stock by 2.
- Validation Rule: Ensures stock never goes below 0.

5. Loyalty Program

- Elijah now has a total purchase of ₹1000.
- A trigger on Customer checks his total purchases.

Based on the value:

< ₹500 ➡ Bronze

₹500 - ₹1000 ➡ Silver

₹1000 ➡ Gold

- So, Elijah becomes a Silver member.

6. Email Notifications

- When a new order is placed or loyalty status is updated.
- Flow + Email Alert is triggered.
- Elijah gets an email:
“Thanks for your purchase! Your loyalty status is now Silver.”

7. Users & Roles

Salesforce users like store staff are created:

- **Niklaus Mikaelson** – *Sales Role* (Platform 1 Profile)
- **Kol Mikaelson** – *Inventory Role* (Platform 1 Profile)

SCREENSHOTS

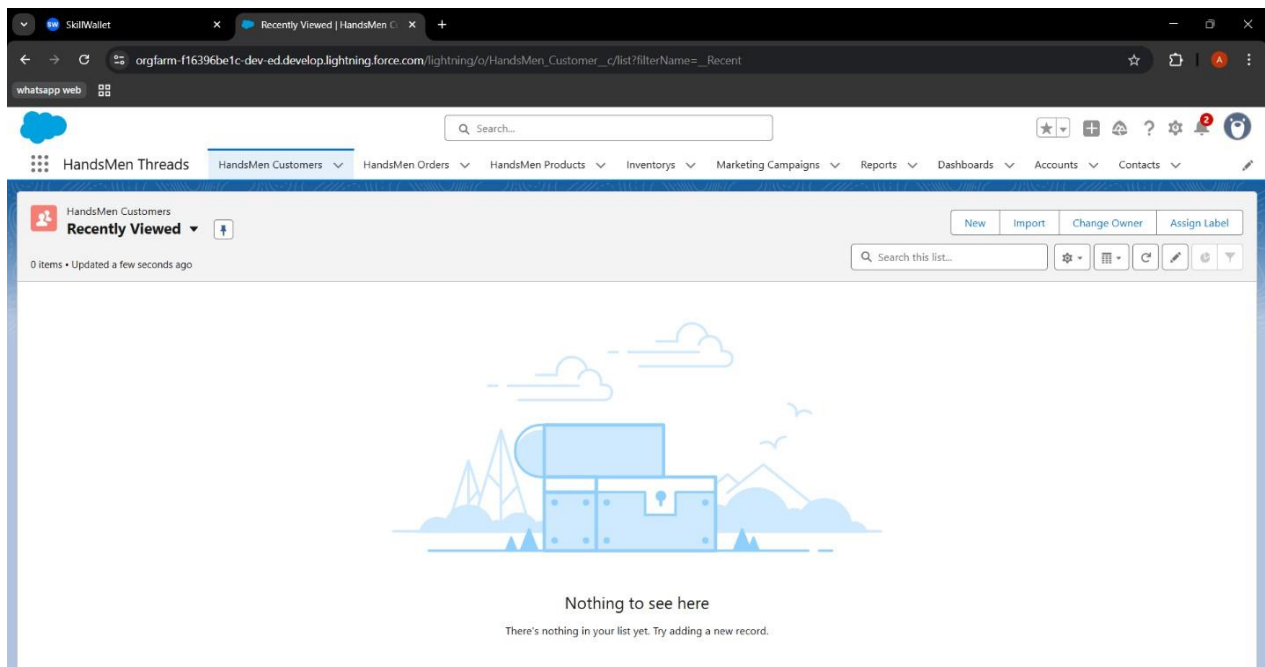


Fig: Custom App for HandsMen Threads

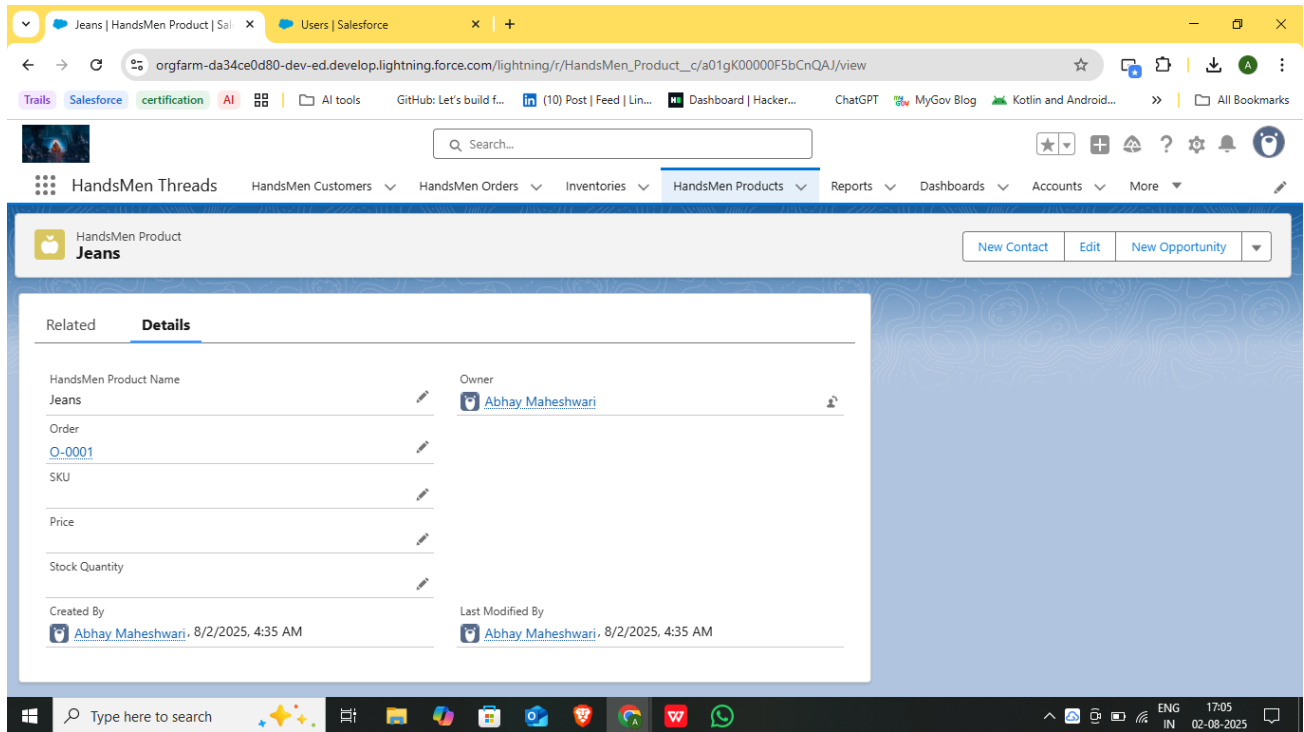


Fig: Customer Creation in HandsMen Threads

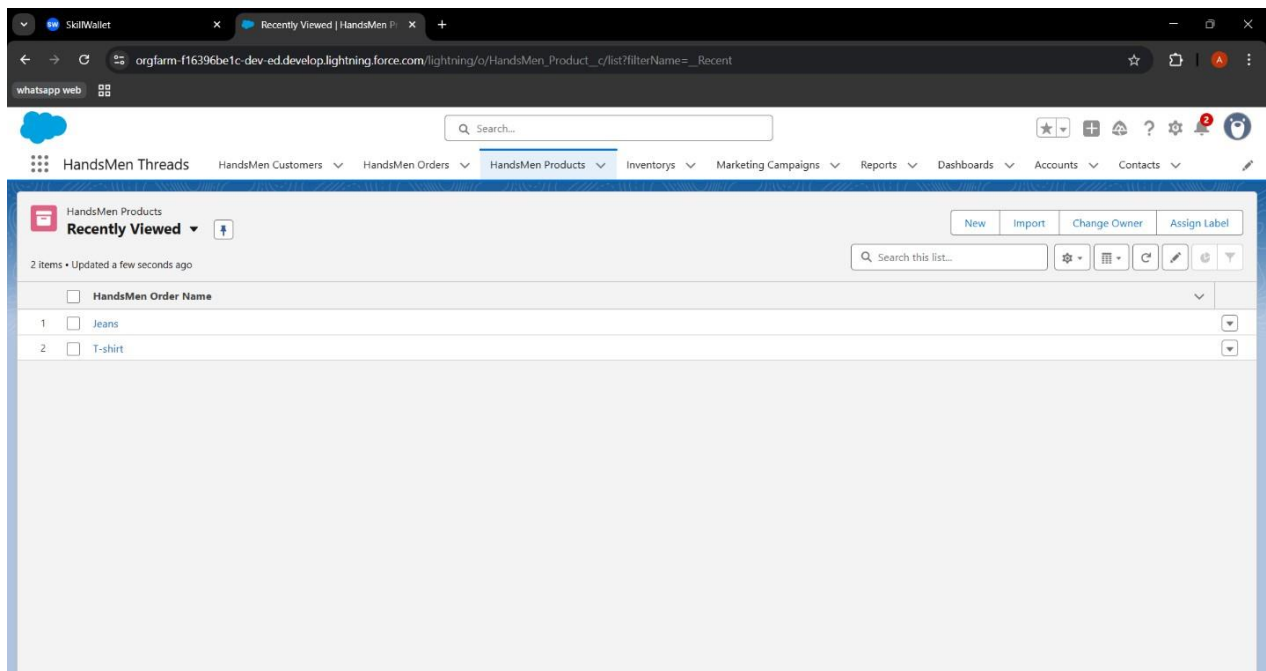


Fig: Products in HandsMen Threads

The screenshot displays a Salesforce Lightning interface for a product record. The browser address bar shows a Lightning component URL. The navigation bar at the top includes tabs for 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'Inventories', 'HandsMen Products', 'Reports', 'Dashboards', 'Accounts', and 'More'. The 'HandsMen Products' tab is selected, showing the 'HandsMen Product Jeans' record. The record details are as follows:

Related	Details
HandsMen Product Name	Jeans
Order	O-0001
SKU	
Price	
Stock Quantity	
Created By	Abhay Maheshwari, 8/2/2025, 4:35 AM
Last Modified By	Abhay Maheshwari, 8/2/2025, 4:35 AM

The interface also features a search bar, a sidebar with navigation icons, and a task bar at the bottom with various application icons.

Fig: Orders Confirmation in HandsMen Threads

CONCLUSION

The Salesforce initiative at **HandsMen Threads** marks a pivotal step in the organization's evolution toward data-driven excellence and customer-centric operations. By developing a tailored data model and integrating automated workflows, the company is reinforcing its commitment to sophistication—not only in fashion but also in business process management.

Key deliverables like **automated order confirmations**, a **dynamic loyalty program**, **proactive stock alerts**, and **scheduled bulk order updates** ensure that operations are more efficient, responsive, and aligned with customer expectations. The emphasis on **data integrity** through the user interface guarantees reliable and actionable insights, essential for strategic decisions in a competitive industry.

Through this project, participants gain valuable expertise in **Salesforce development**, especially in **data modeling**, **UI integrity**, and **automation using flows and Apex**. These are critical skills for any modern Salesforce developer or administrator looking to deliver high-impact business solutions.

Future Scope:

1. AI - Driven Personalization:

Incorporating Salesforce Einstein or other AI tools to provide product recommendations, style suggestions, or tailor marketing campaigns based on customer behavior.

2. Omnichannel Customer Engagement:

Integration with social media platforms, chatbots, and SMS to provide seamless customer support and engagement across channels.

3. Mobile App Integration:

Creating a Salesforce-powered mobile portal for customers and internal staff for real-time order tracking, loyalty rewards, and customer service.

4. Advanced Analytics & Reporting:

Leveraging Tableau CRM or custom dashboards to analyze customer trends, sales performance, and inventory turnover in greater depth.

5. Supplier and Vendor Management Module:

Extend the platform to include supplier performance tracking, automated purchase orders, and invoice reconciliation to streamline backend operations.

6. Blockchain for Inventory Authenticity:

Future-proof the brand by exploring blockchain technology to verify the authenticity of high-end products and prevent counterfeiting.