

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

## **ABSTRACT**

**HandsMen Threads**, a forward-thinking organization in the fashion industry, is launching a Salesforce-powered digital transformation initiative aimed at streamlining data management and elevating customer engagement. This project centers around the creation of a robust, scalable data model that ensures a seamless and secure flow of business information across all departments. A major focus is on enforcing data integrity directly through the user interface (UI), thereby maintaining the accuracy and reliability of data at every touchpoint. The integration of automated workflows will modernize operations, enabling real-time updates, personalized customer experiences, and proactive inventory management. Through this initiative, HandsMen Threads aims to enhance operational efficiency, customer satisfaction, and decision-making capabilities.

## **OBJECTIVE**

To achieve the strategic goals of the Salesforce implementation at HandsMen Threads, the project outlines the following key objectives aimed at enhancing data integrity, operational efficiency, and customer engagement:

- **Automate Customer Communication Post-Order**  
Configure workflows to send real-time email confirmations to customers upon order completion, enhancing customer engagement and trust.
- **Implement a Dynamic Loyalty Program**  
Design automated logic to update customer loyalty statuses based on purchase behavior, driving personalized rewards and fostering customer retention.
- **Enable Proactive Inventory Management**  
Set up automatic alerts to notify warehouse teams when stock levels fall below five units, ensuring timely replenishment and preventing disruptions.

- **Automate Daily Bulk Order Processing**  
Schedule a nightly batch process to update inventory and financial records for all bulk orders, ensuring data accuracy for daily operations.

## **TECHNOLOGY DESCRIPTION**

### **1. Salesforce**

Salesforce is a cloud-based CRM platform that offers powerful tools for managing customer relationships, automating workflows, and streamlining business processes. It provides scalable solutions for sales, service, marketing, and analytics, all integrated into a single, customizable ecosystem.

In this project, Salesforce serves as the foundation for developing a centralized data model, enhancing UI-based data integrity, and automating customer and inventory interactions through native features and custom logic.

### **2. Custom Objects**

Custom objects are created to store business-specific data not covered by standard Salesforce objects. For this project, they represent unique entities such as Loyalty Status, Bulk Orders, and Inventory Logs.

- Customer\_\_c – Stores Customer Info
- Product\_\_c- Stores Product Info
- Order\_\_c- Stores Order Info

### **3. Tabs**

Tabs provide user-friendly access points to both standard and custom objects through the UI. They allow users to view, create, and manage records related to orders, inventory, and customer loyalty.

Example- A tab for Product\_\_c allows user to easily view and manage product

### **4. Custom App**

A custom Salesforce app consolidates relevant tabs, processes, and user permissions into a cohesive workspace. It offers a tailored experience for different user roles such as sales reps, warehouse staff, and administrators.

### **5. Profiles**

Profiles define the baseline permissions for users, controlling what data and features they can access. Different profiles are configured for warehouse users, customer service agents, and management staff.

## **6. Roles**

Roles determine the data visibility hierarchy within the organization. Higher roles, such as management, can access broader sets of data, while lower roles see only what is relevant to their functions.

## **7. Permission Set**

Permission sets provide additional access rights to users without changing their profile, allowing flexible, scalable control over feature access.

## **8. Email Template**

Email templates standardize the content sent to customers and staff, ensuring consistent branding and messaging. Templates are used for order confirmations, stock alerts, and loyalty notifications.

Example- “Order Confirmation” Email Template

## **9. Email Alert**

Email alerts are automated messages triggered by defined conditions in workflows or flows. They support real-time communication for events such as low inventory or order completions.

## **10. Flows**

Salesforce Flows automate complex business processes by guiding users through steps or executing logic in the background. In this project, flows handle order confirmation emails, loyalty status updates, and stock alert notifications.

- Flow triggers email alerts on new order

## **11. Apex**

Apex is Salesforce's proprietary programming language used for advanced logic not possible with standard tools. Apex is used here to handle custom logic for scheduled bulk order processing and dynamic inventory adjustments.

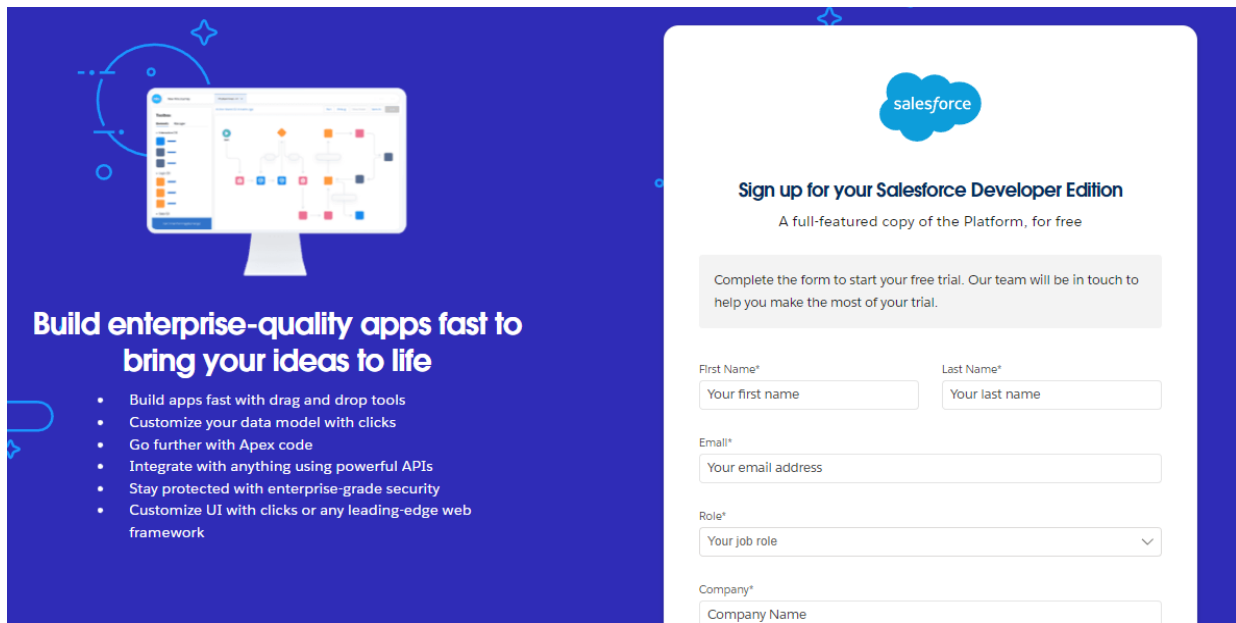
Example Triggers:

- Update Total\_Amount\_\_c in orders
- Reduce Inventory Stock

## **DETAILED EXECUTION OF PROJECT PHASES**

### **1. Developer Org Setup**

- Creating a developer org in salesforce.
- Go to <https://developer.salesforce.com/signup>



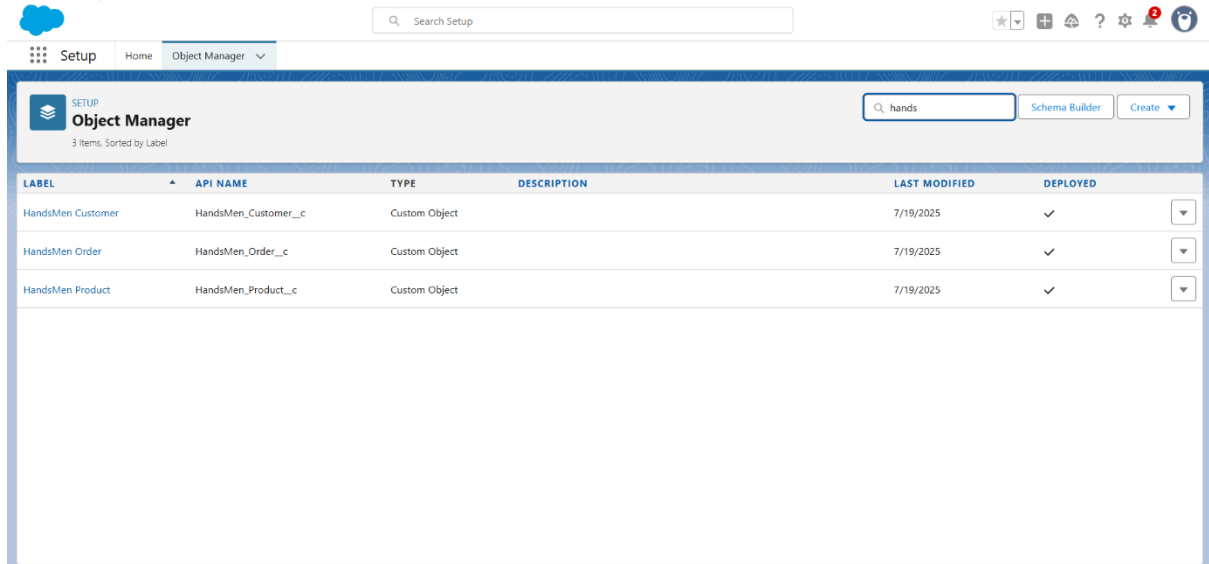
### **2. Custom Object Verification:**

Creating Five Custom Objects:

- Object - HandsMen Customer
- Object - HandsMen Product
- Object - HandsMen Order
- Object – Inventory
- Object - Marketing Campaign

Steps to Create Custom Object

- To create an object:
- From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
- Enter the label name→ HandsMen Customer
- Plural label name→ HandsMen Customer
- Enter Record Name Label and Format



### 3. Create Lightning App:

- A custom Lightning app named Handsmen is created
- Included Tabs: HandsmenCustomer, Product, Order, Inventory, Marketing Campaign

### 4. User Role and Profile Setup

- User roles and profiles are configured to align access levels with job responsibilities. Roles include **Sales Manager**, **Inventory Manager**, and **Marketing Team**, each with a tailored data visibility scope. Profiles define object-level permissions, ensuring users can only view or edit data relevant to their function. This setup ensures secure, role-based access while maintaining operational efficiency
- Created Roles for different Department:  
Sales Manager, Inventory Manager, Marketing team

### 5. User Creation

- Setup

Home

Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

SETUP

Users

Help for this Page

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View:

All Users

Edit

Create New User

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00d900000756tuxi@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIC	epic_a54cb3dc024@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Mikaelson, Daniel	dmika	gautam.nautiya@4013@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/> Edit	Mikaelson, Kel	kmika	gautam.nautiya@4783@gmail.com	Inventory	<input type="checkbox"/>	Platform 1
<input type="checkbox"/> Edit	Mikaelson, Niklaus	nmika	gautam.nautiya@4423@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/> Edit	Nautiyal, Gautam	gau	gautam.nautiya@43247@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@000900000756tuxi.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insights@000900000756tuxi.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

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

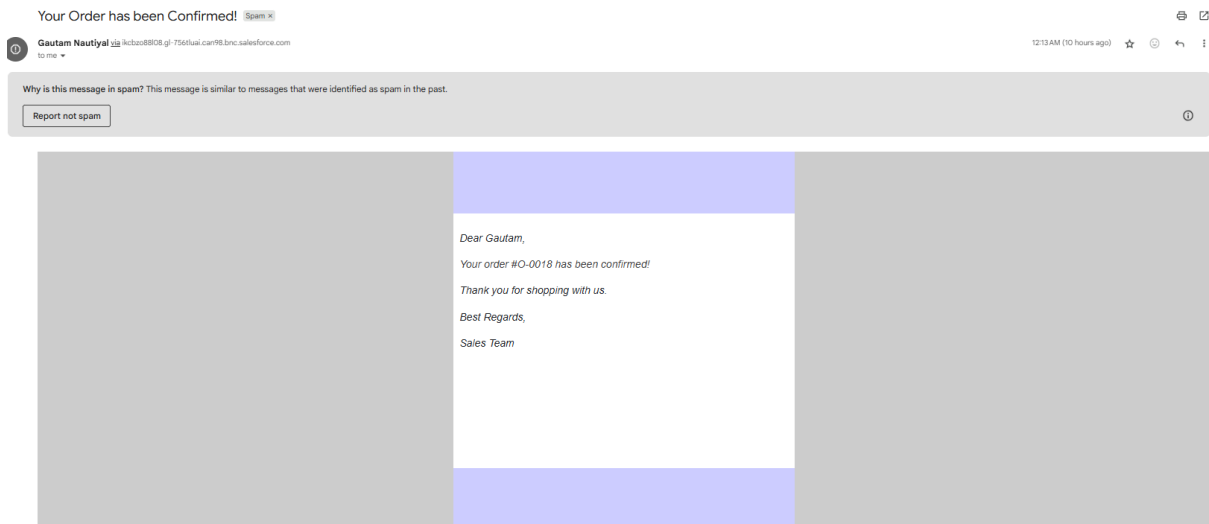
Z

Other

All

Created Three Email Template:

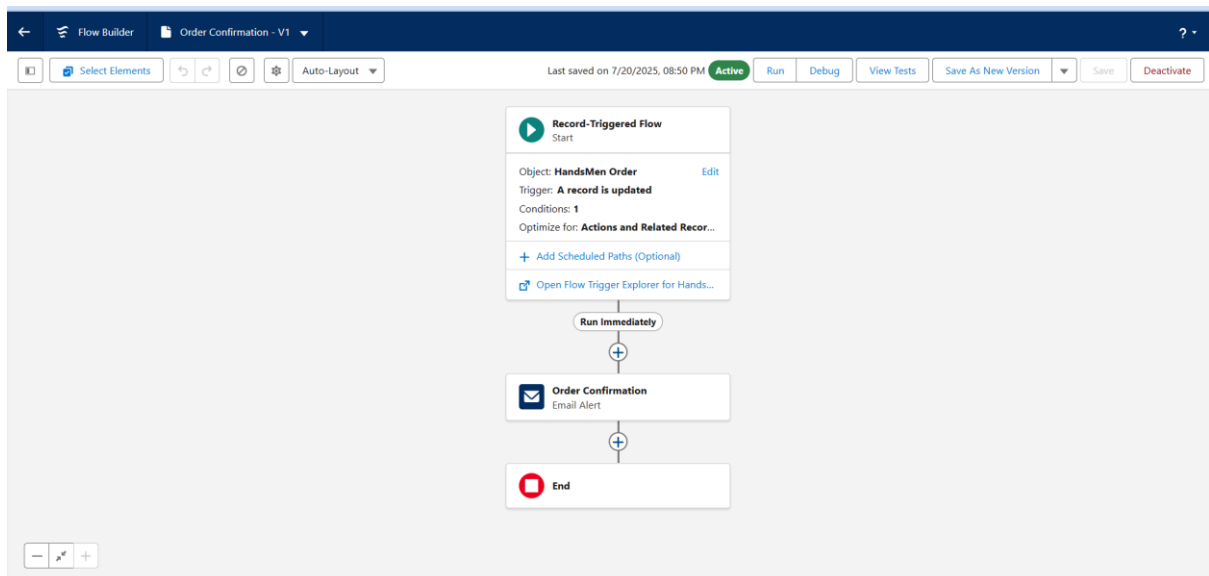
- Order Confirmation Email Template
- Stock Alert Email Template
- Loyalty Status Email Template



## 7. Flows

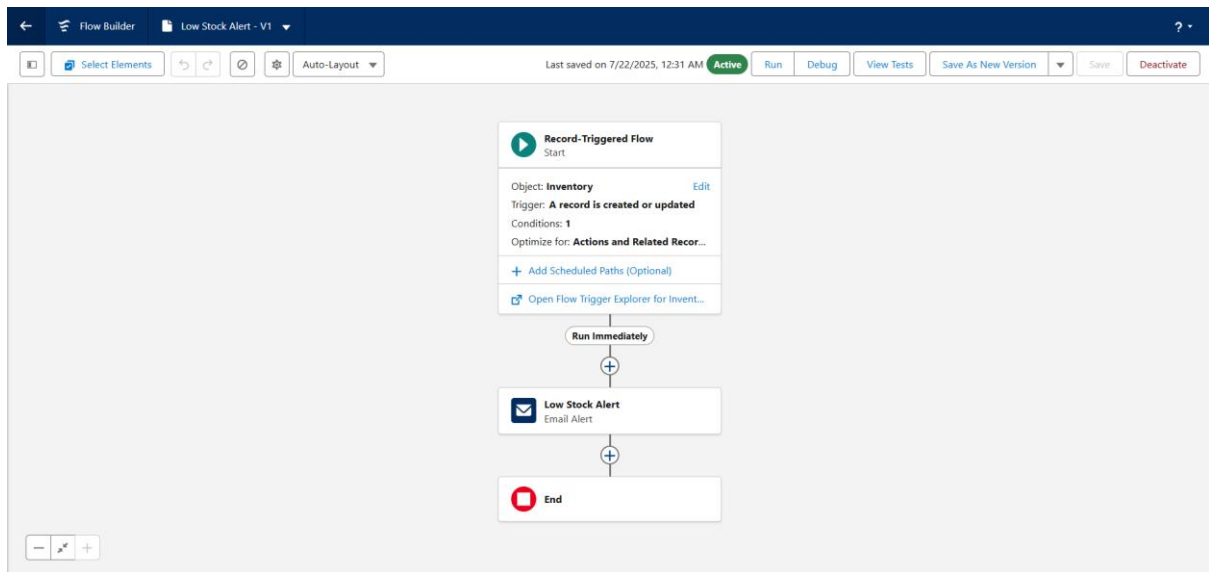
- **Order Confirmation Flow:**

Record Trigger Flow, Triggered when the order is confirmed



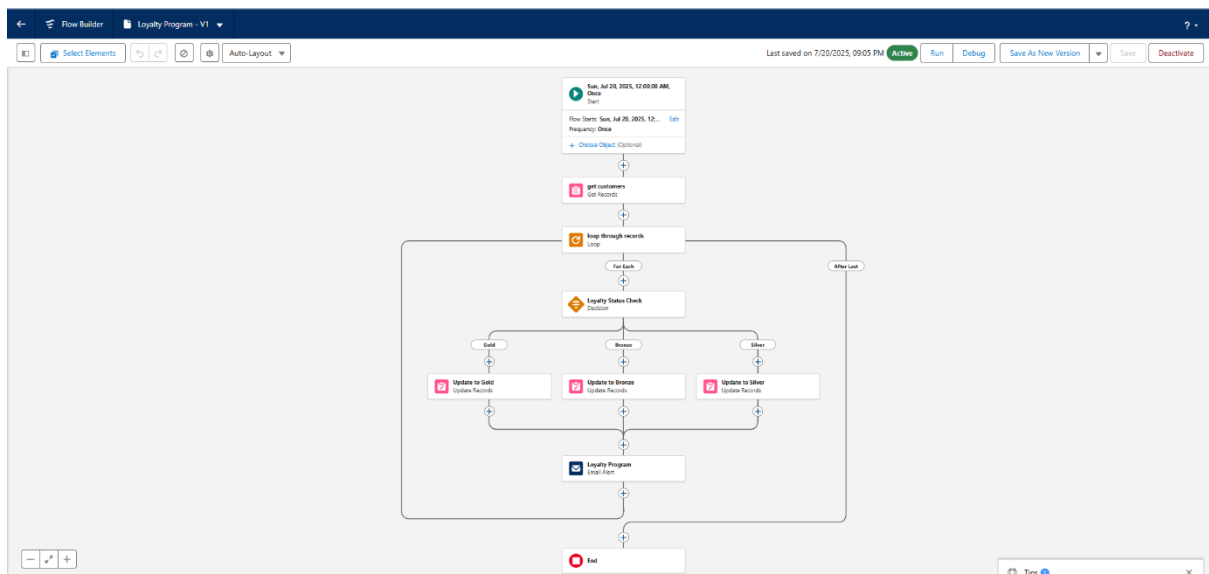
- **Stock Alert Flow:**

Record Trigger Flow, Triggers when the stock quantity is Low



- **Loyalty Status Flow:**

Scheduled Flow, Triggers when the total purchases of the customer is Updated



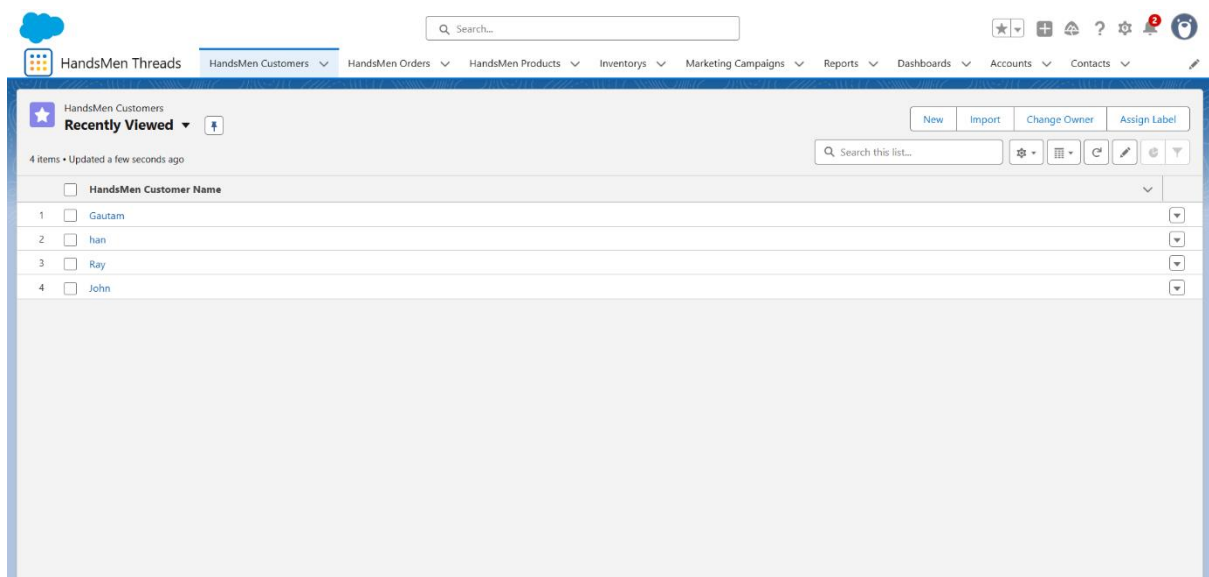
## 8. Apex Triggers

- **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.

## SCREENSHOTS



**Fig: Custom App For Handsmen Thread**

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

Search...

HandsMen Customer: **Ray** | New Contact | Edit | New Opportunity

**Details**

HandsMen Customer Name	Ray	Owner	Gautam Nautiyal
Email	gautamnautiyal943@gmail.com		
Phone			
Loyalty Status	Gold		
FirstName	Ray		
LastName	Johnson		
FullName	Ray Johnson		
Total Purchases	1,200		
Created By	Gautam Nautiyal, 7/21/2025, 8:15 AM	Last Modified By	OrgFarm EPIC, 7/21/2025, 11:43 AM

**Fig: Handsmen Customer**

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

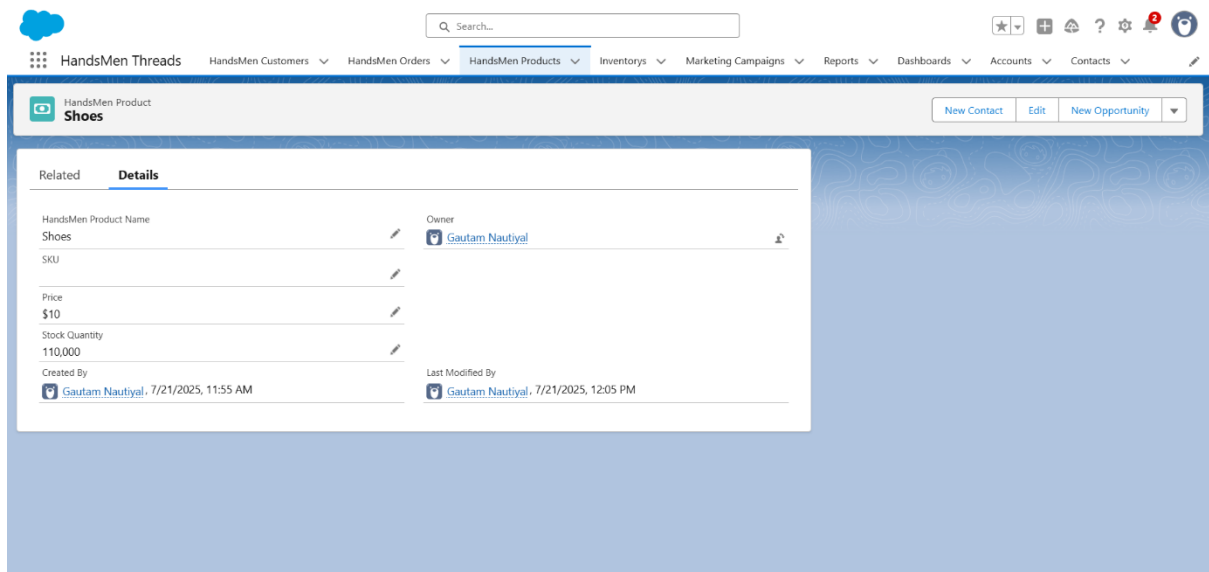
Search...

HandsMen Order: **O-0021** | New Contact | Edit | New Opportunity

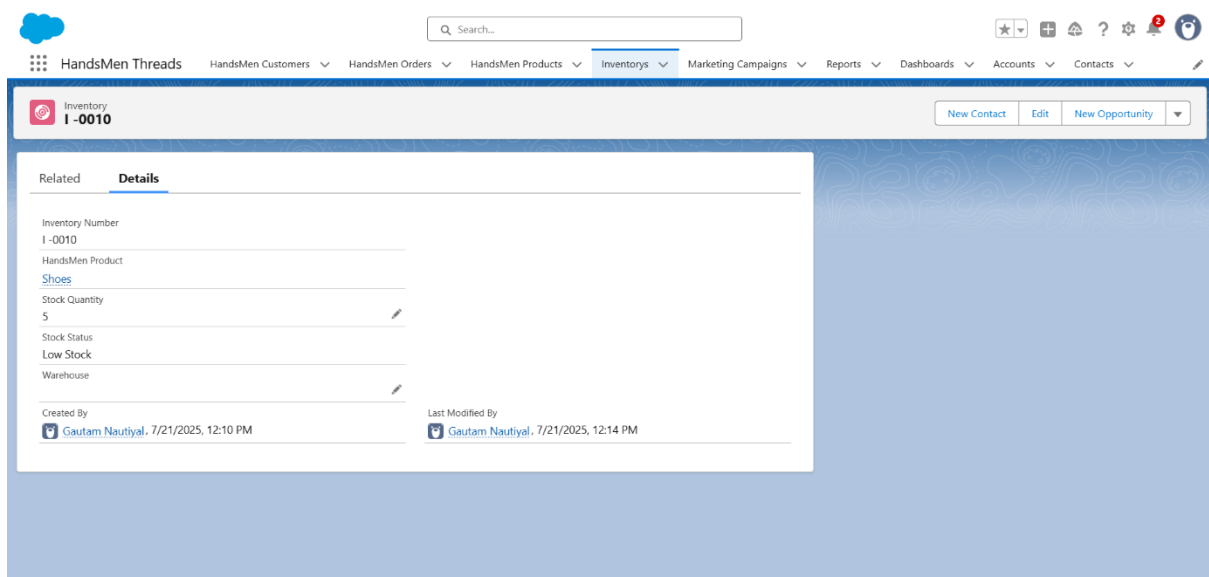
**Details**

HandsMen OrderNumber	O-0021	Owner	Gautam Nautiyal
HandsMen Product	Shoes		
HandsMen Customer	Ray		
Status	Confirmed		
Quantity	600		
Total Amount	6,000		
Customer Email	gautamnautiyal943@gmail.com		
Created By	Gautam Nautiyal, 7/21/2025, 12:11 PM	Last Modified By	Gautam Nautiyal, 7/21/2025, 12:11 PM

**Fig: Handsmen Orders**

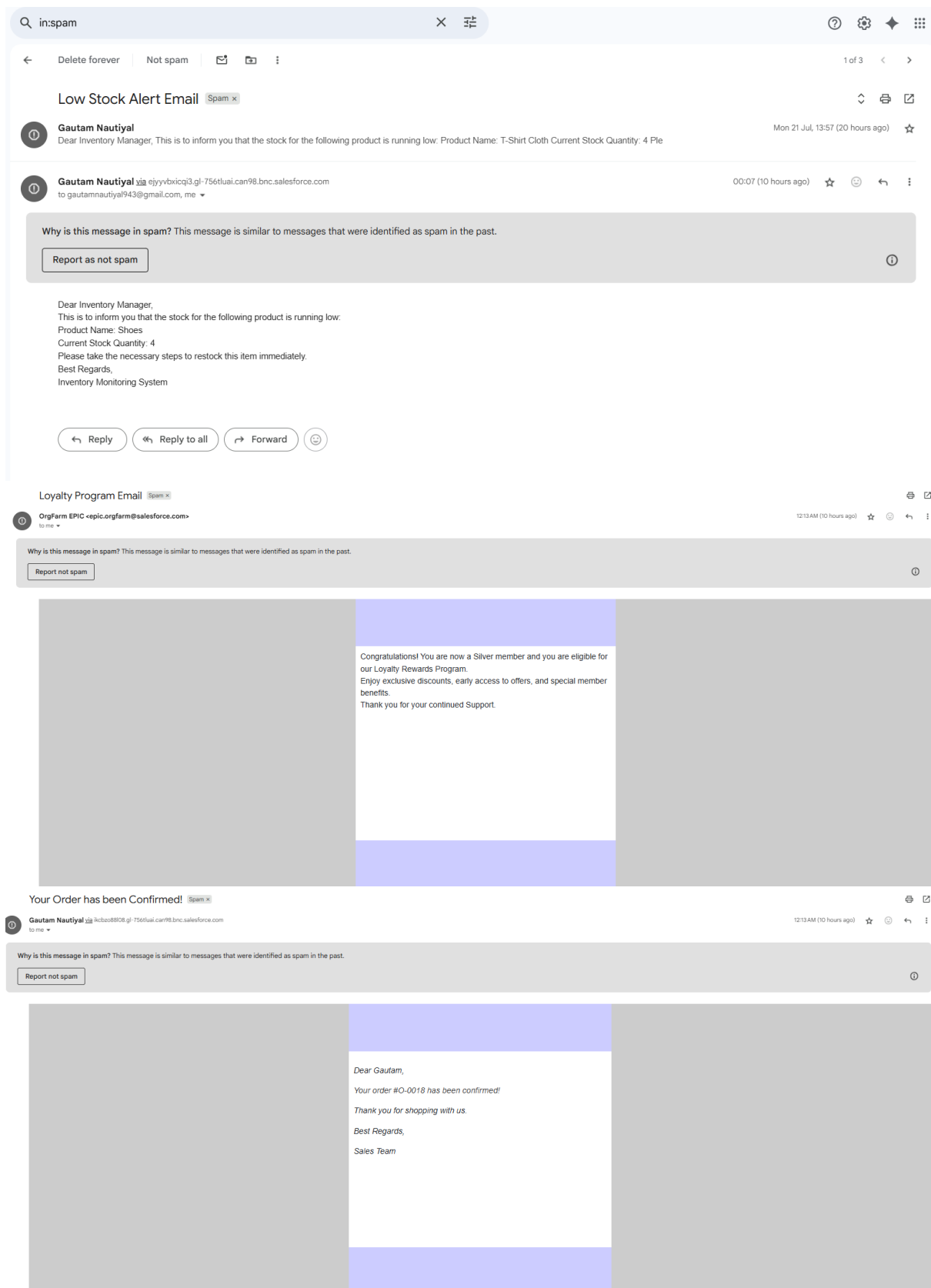


**Fig: Handsmen Products**

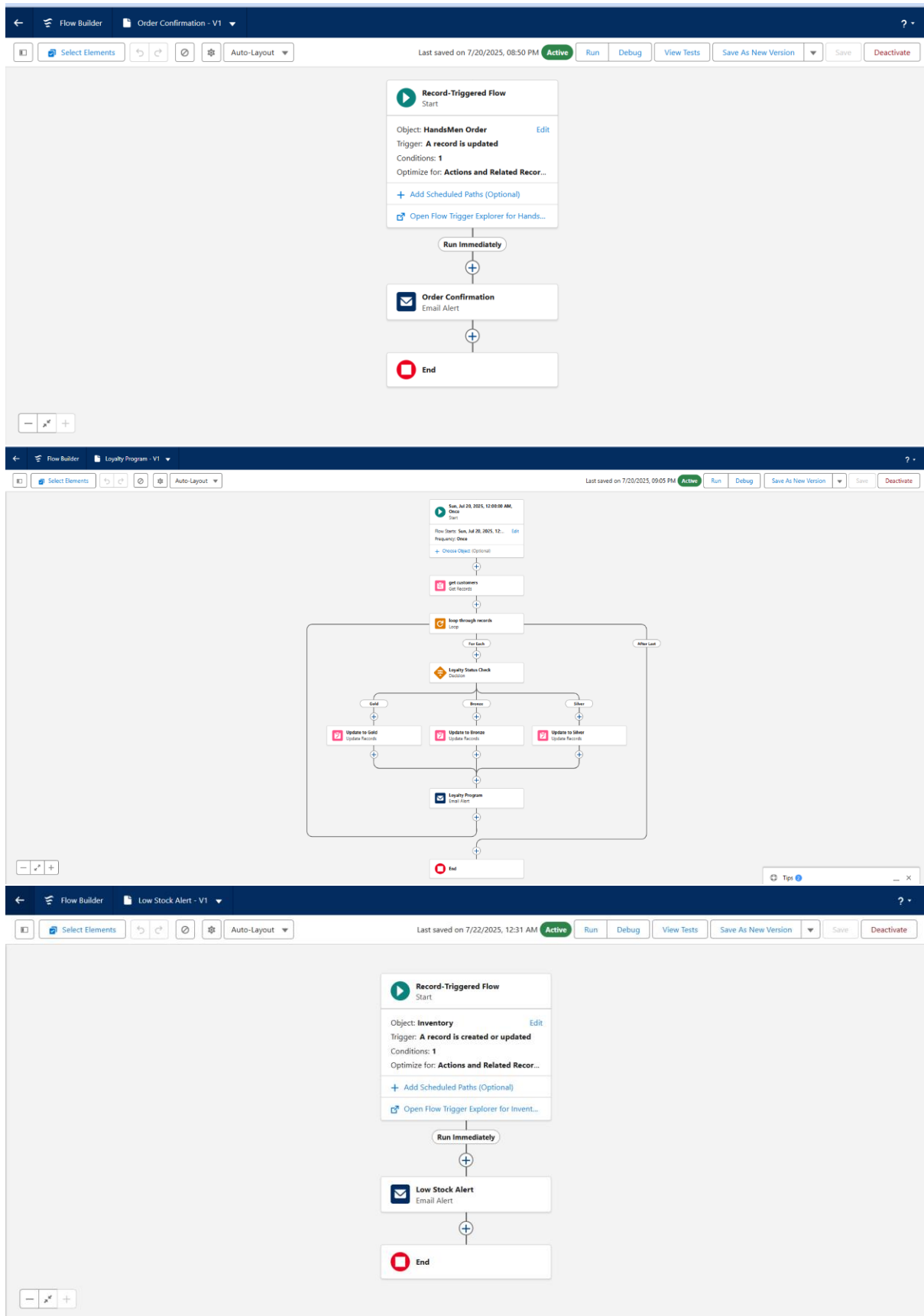


**Fig: Inventories**





**Fig: All Email Alerts**



**Fig: All Flows**

## **CONCLUSION**

The Salesforce implementation at HandsMen Threads successfully modernizes the organization's data handling and customer engagement processes. By introducing a robust data model, role-based access, and automated workflows—including order confirmations, loyalty updates, and inventory alerts—the system ensures improved accuracy, operational efficiency, and customer satisfaction. The use of custom objects, flows, Apex triggers, and email automation aligns with the company's goal of delivering seamless, responsive services.

### **Future Scope**

Looking ahead, the system can be further enhanced with the following capabilities:

- **Integration with E-commerce Platforms** such as Shopify or WooCommerce for real-time order and inventory sync.
- **AI-Powered Insights** using Salesforce Einstein to predict customer buying patterns and personalize marketing strategies.
- **Mobile App Integration** for on-the-go access by warehouse or field sales teams.
- **Advanced Reporting and Dashboards** for leadership to track KPIs, loyalty trends, and inventory health in real time.
- **Customer Portal** allowing users to track orders, view loyalty points, and raise service requests independently.

These future enhancements will further empower HandsMen Threads to scale operations, improve decision-making, and build stronger customer relationships.

