

# **Handsmen Threads – Salesforce CRM & Automation Implementation**

Empowering Business Through Intelligent Automation

Presented by: Morumpalli Jayasudha

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:

The screenshot shows the SkillWallet dashboard. On the left is a blue sidebar with navigation links: Dashboard, Skill Bank, Skill Wallet, Skill Card, and Skill Credits. The main content area is titled 'HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion'. It includes a 'Story' tab, a 'Duration: 20m' indicator, and a status 'In Progress'. The project is assigned to 'Morumpalli Jayasudha'. Below this is a 'Description' section with the heading 'Creating Developer Account' and instructions on how to create a developer org in Salesforce. To the right of the description is a 'Project Progress' section with a 50% completion bar and a list of tasks: Use Case (50%), User Story (50%), Salesforce Cerdentials Setup (50%), Developer Account Creation, Account Verification, and Data Management - Objects (50%).

The screenshot shows a Salesforce Lightning page. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The page title is 'HandsMen Threads'. Below the title is a tabbed interface with 'HandsMen Customers' selected. The 'HandsMen Customers' section shows a 'Recently Viewed' list with one item: 'John'. The list has a search bar and various action buttons like 'New', 'Import', 'Change Owner', and 'Assign Label'. The page also shows a 'HandsMen Orders' tab and a 'HandsMen Products' tab.

Browser tabs: SkillWallet, Login | Salesforce, Welcome to Salesforce: Reset y, John | HandsMen Customer | S...

Address bar: orgfarm-a07669faf5-dev-ed.develop.lightning.force.com/lightning/r/Hands\_Men\_Customer\_c/a00gL00000CJFdyQAH/view


Search bar: Search...

Navigation menu: HandsMen Threads, HandsMen Customers, HandsMen Orders, HandsMen Products, Inventories, Marketing Campaigns, Reports, More

HandsMen Customer John

Buttons: New Contact, Edit, New Opportunity

Related Details

Hands Men Customer Name	Owner
John	 Morumpalli Jayasudha
Email	
morumpallijayasudha@gmail.com	
Phone	
Loyalty Status	
Bronze	
FirstName	
John	
LastName	
m	
FullName	
John m	
Total Purchases	
0	

Browser tabs: SkillWallet, Login | Salesforce, Welcome to Salesforce: Reset y, John | HandsMe


Address bar: orgfarm-a07669faf5-dev-ed.develop.lightning.force.com/lightning/r/Hands\_Men\_Customer\_c/a00gL00000CJFdyQA

Search bar: Search...

Navigation menu: HandsMen Threads, HandsMen Customers, HandsMen Orders, HandsMen Products, Inventories

HandsMen Customer John

Related Details

Hands Men Customer Name	Owner
John	 Morumpalli Jayasudha
Email	
morumpallijayasudha@gmail.com	
Phone	

HandsMen Orders

Recently Viewed

4 items • Updated a few seconds ago

Search this list...




	HandsMen Order Number	
1	<input type="text" value="O-0004"/>	
2	<input type="text" value="O-0003"/>	
3	<input type="text" value="O-0002"/>	
4	<input type="text" value="O-0001"/>	

HandsMen Product

T-shirt cloth

New Contact Edit New Opportunity

Related Details

HandsMen Products Name	Owner
T-shirt cloth	 <a href="#">Morumpalli Jayasudha</a>
SKU	
Price	
\$3	
Stock Quantity	
Created By	Last Modified By
 <a href="#">Morumpalli Jayasudha</a> , 7/29/2025, 12:00 AM	 <a href="#">Morumpalli Jayasudha</a> , 7/29/2025, 1:43 AM

Browser tabs: SkillWallet, Login | Salesforce, Welcome to Salesforce: Reset y..., I-0001 | Inventory | Salesforce

Address bar: orgfarm-a07669faf5-dev-ed.develop.lightning.force.com/lightning/r/Inventories\_c/a03gL0000084SvaQAE/view

Search bar: Search...

Navigation menu: HandsMen Threads, HandsMen Customers, HandsMen Orders, HandsMen Products, **Inventories**, Marketing Campaigns, Reports, More

Inventory Details (I-0001):

- Inventory Number: I -0001
- HandsMen Product: [T-shirt cloth](#)
- Stock Quantity: 600
- Stock Status: Available
- Warehouse: [edit]
- Created By: Morumpalli Jayasudha, 7/29/2025, 12:01 AM
- Last Modified By: Morumpalli Jayasudha, 7/29/2025, 1:56 AM

Buttons: New Contact, Edit, New Opportunity

Browser tabs: SkillWallet, Login | Salesforce, Low Stock Alert Email - morum..., I-0001 | Inventory | Salesforce

Address bar: mail.google.com/mail/u/0/?tab=rm&ogbl#spam/FMfcgzQbgRvDvXSRgvCPSCBvhFTVxhJH

Search bar: in spam

Left sidebar: Compose, Inbox (19), Starred, Snoozed, Sent, Drafts (1), Less, Important, Chats, Scheduled, All Mail, **Spam (1)**, Trash, Categories, Manage subscriptions, Manage labels, Create new label, Labels, Upgrade

Email Content:

Low Stock Alert Email [Spam]

From: Morumpalli Jayasudha <tx4uonwQhmsplgl-7hwntuaycan98@bnc.salesforce.com> to me

Tue, Jul 29, 1:46 PM (2 days ago)

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

[Report not spam](#)

Dear Inventory Manager,  
This is to inform you that the stock for the following product is running low:  
Product Name:  
Current Stock Quantity:  
Please take the necessary steps to restock this item immediately.  
Best Regards,  
Inventory Monitoring System

Buttons: Reply, Forward, [icon]

Windows taskbar: Search, [icons], ENG IN, 15:10, 31-07-2025

SkillWallet

Login | Salesforce

Your Order has been Confirmed

I -0001 | Inventory | Salesforce

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

Compose

Inbox19

Starred

Snoozed

Sent

Drafts1

Less

Important

Chats

Scheduled

All Mail

Spam1

Trash

Categories

Manage subscriptions

Manage labels

Create new label

Labels

Upgrade

inc:spam

Delete forever

Not spam

3 of 4

Your Order has been Confirmed!

Spam x

Morumpalli Jayasudha

via vtpqpn47atzo-gl-7hwmtuay-canf98.bnc.salesforce.com

to me

Tue, Jul 29 1:27 PM (2 days ago)

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

Report not spam

Dear ,

Your order # has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team