

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

1. Introduction

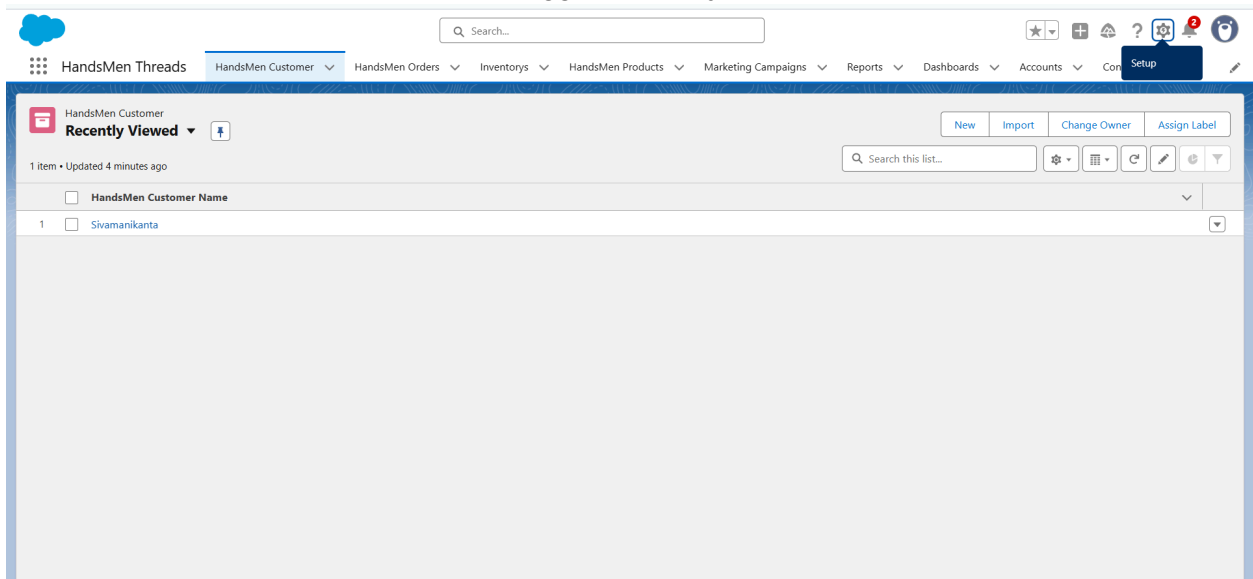
HandsMen Threads is a bespoke tailoring business that wants to improve customer experience, automate orders, and manage inventory effectively.

This project leverages **Salesforce CRM** to:

- Manage **customers, products, orders, and inventory**.
- Automate **order confirmation emails**.
- Send **low-stock alerts**.
- Implement a **loyalty program**.
- Maintain **clean and accurate data** using validation rules.
- Schedule **inventory restocking** automatically

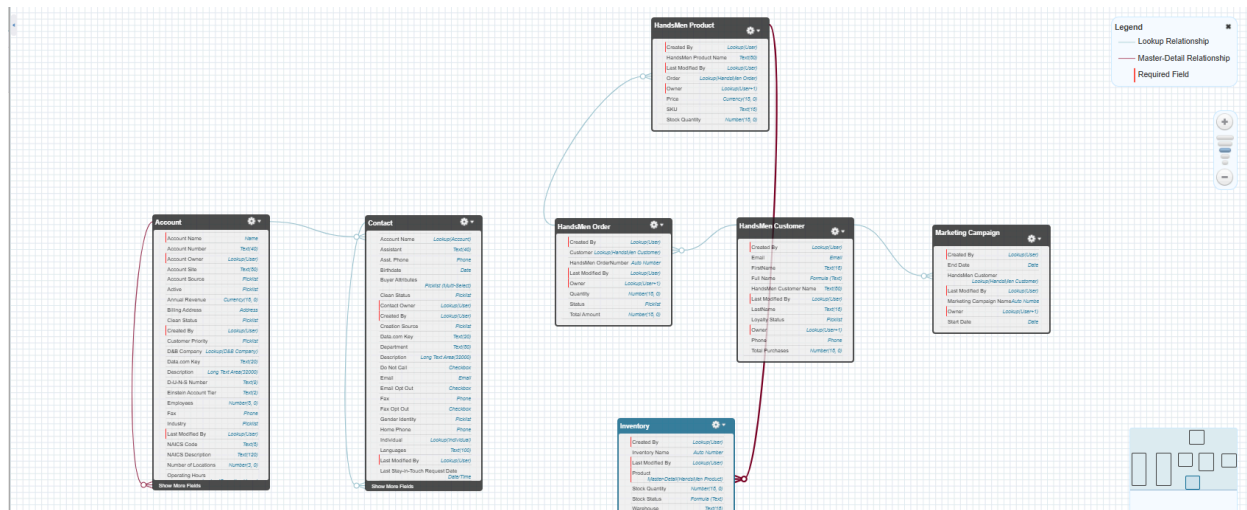
2. Project Goals

- Automate key business processes like order confirmations, stock alerts, and loyalty status updates.
- Improve data accuracy using validation rules.
- Provide better customer engagement with emails and loyalty rewards.
- Secure data using roles, profiles, and permission sets.
- Reduce manual work with Apex triggers, batch jobs, and flows.



We created the following custom Salesforce objects:

1. **HandsMen Customer**
Stores customer information like name, email, phone, total purchases, and loyalty status (Bronze, Silver, or Gold).
2. **HandsMen Product**
Stores product details like name, price, and available stock.
3. **HandsMen Order**
Tracks each order placed by a customer, linked to both the **Customer** and **Product**.
4. **Inventory**
Tracks the stock levels of each product.
 - If stock falls below 5, an **email alert** is sent.
5. **Marketing Campaign**
Manages promotional campaigns and links to customers.



4. Relationships Between Objects

- **Customer → Orders:** Each customer can place multiple orders.
(LOOKUP RELATIONSHIP)

The screenshot shows the 'Edit O-0001' form in a CRM system. The form is titled 'Edit O-0001' and has a subtitle '* - Required Information'. It contains several fields: 'HandsMen OrderNumber' (O-0001), 'Owner' (Siva Manikanta Gudla), 'Customer' (a dropdown menu with 'Sivamankanta' selected), 'Recent HandsMen Customer' (a list of recent customers), 'Total Amount' (205), and 'Created By' (Siva Manikanta Gudla, 7/27/2025, 1:34 AM). The form also has 'Cancel', 'Save & New', and 'Save' buttons.

- **Order → Product:** Each order is linked to a product.
(LOOKUP RELATIONSHIP)

The screenshot shows the 'Edit shirt' form in a CRM system. The form is titled 'Edit shirt' and has a subtitle '* - Required Information'. It contains several fields: 'HandsMen Product Name' (shirt), 'Order' (a dropdown menu with 'O-0001' selected), 'Recent HandsMen Orders' (a list of recent orders), 'Price' (O-0004), 'SKU' (O-0003), and 'Created By' (Siva Manikanta Gudla, 7/27/2025, 2:45 AM). The form also has 'Cancel', 'Save & New', and 'Save' buttons.

- **Inventory → Product:** Inventory is directly tied to each product.
(MASTER-DETAIL RELATIONSHIP)

The screenshot shows the 'New Inventory' form in a CRM system. The form is titled 'New Inventory' and has a subtitle '* - Required Information'. It contains several fields: 'Inventory Name' (a dropdown menu with 'I-0001' selected), 'Product' (a dropdown menu with 'pant' selected), 'Stock Quantity' (a text input field), and 'Warehouse' (a text input field). The form also has 'Cancel', 'Save & New', and 'Save' buttons.

- **Marketing Campaign → Customer:** Campaigns target specific customers.
(LOOKUP RELATIONSHIP)

5. Validation Rules

To ensure data accuracy:

- **Orders:** Total amount must be greater than 0.

- **Inventory:** Stock quantity cannot be less than 0.

- **Customers:** Email must include "@gmail.com".

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

HandsMen Customer
Sivamanikanta

Related **Details**

* = Required Information

HandsMen Customer Name: Sivamanikanta

Owner: Siva Manikanta Gudla

Email: siv@mail.com
Email: invalid email address: siv@mail.com

Phone: 123456789

Loyalty Status: Bronze

First Name: siva

Last Name: manikanta

We hit a snag.
Review the following fields:
• Email

Buttons: Cancel, Save

6. Security Model

- **Profiles:** A custom profile named **Platform 1** (cloned from Standard User) with access to HandsMen objects.

Setup | Home | Object Manager

Search Setup

profiles

Users

Profiles

Profile: **Platform 1**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

Name	Platform 1
User License	Salesforce
Description	Custom Profile
Created By	Siva Manikanta Gudla, 7/24/2025, 1:52 AM
Modified By	Siva Manikanta Gudla, 7/24/2025, 2:15 AM

Page Layouts

Standard Object Layouts	Global	Location Group
Email Application	Global Layout [View Assignment]	Location Group Layout [View Assignment]
Home Page Layout	Not Assigned [View Assignment]	Location Group Assignment Layout [View Assignment]
Account	Home Page Default [View Assignment]	Macro Layout [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Object Milestone Layout [View Assignment]
Appointment Invitation	Alternative Payment Method Layout [View Assignment]	Operating Hours Layout [View Assignment]
	Appointment Invitation Layout	Opportunity Layout

- **Roles:**
 - CEO (Top role)

■ Sales

The screenshot shows the Salesforce Setup interface for the 'Sales' role. The left sidebar contains a navigation menu with 'Users' and 'Roles' highlighted. The main content area displays the 'Sales' role details, including a list of users assigned to the role. The role is named 'Sales' and is associated with the 'CEO' label. The role detail section shows that the role reports to the CEO, was modified by Silva Manikanta Gudla on 7/24/2025 at 2:02 AM, and is shared with the 'Role and Internal Subordinates' group. The role access section indicates that users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities. The 'Users in Sales Role' table lists one user: Ninaus Mikaelson, with the alias 'nmika' and email 'nmika@test.com'.

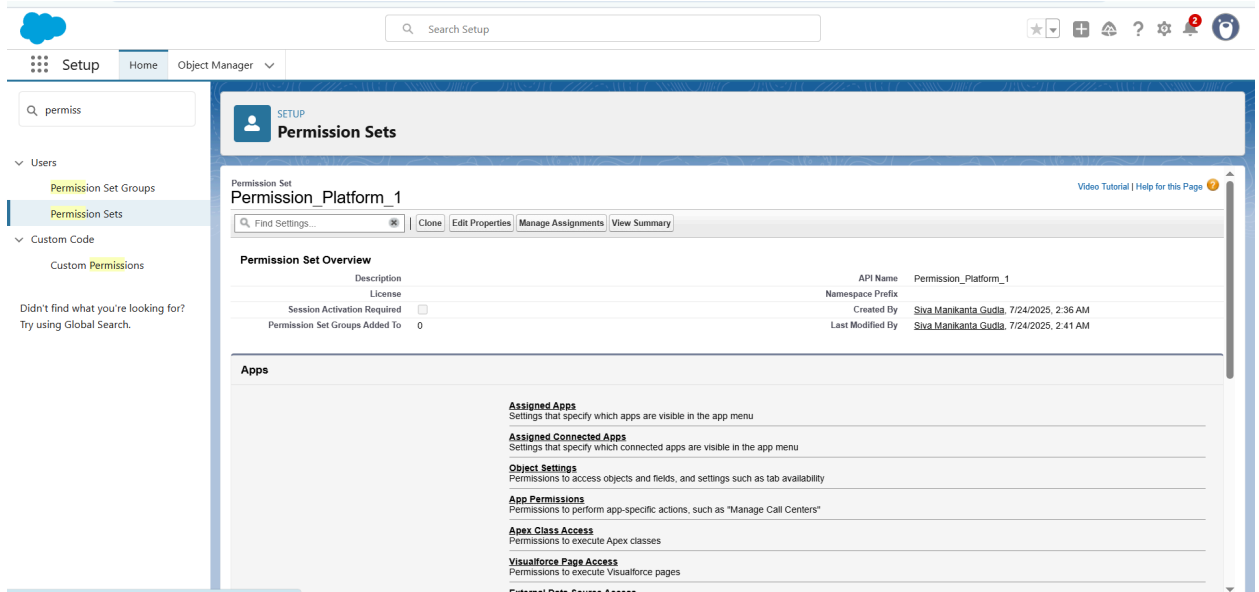
■ Inventory

The screenshot shows the Salesforce Setup interface for the 'Inventory' role. The left sidebar contains a navigation menu with 'Users' and 'Roles' highlighted. The main content area displays the 'Inventory' role details, including a list of users assigned to the role. The role is named 'Inventory' and is associated with the 'CEO' label. The role detail section shows that the role reports to the CEO, was modified by Silva Manikanta Gudla on 7/24/2025 at 2:02 AM, and is shared with the 'Role and Internal Subordinates' group. The role access section indicates that users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases. The 'Users in Inventory Role' table lists one user: Koi Mikaelson, with the alias 'kmika' and email 'kmika@test.com'.

■ Marketing

The screenshot shows the Salesforce Setup interface for the 'Marketing' role. The left sidebar contains a navigation menu with 'Users' and 'Roles' highlighted. The main content area displays the 'Marketing' role details, including a list of users assigned to the role. The role is named 'Marketing' and is associated with the 'CEO' label. The role detail section shows that the role reports to the CEO, was modified by Silva Manikanta Gudla on 7/24/2025 at 2:03 AM, and is shared with the 'Role and Internal Subordinates' group. The role access section indicates that users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases. The 'Users in Marketing Role' table lists one user: Kathy Lockin, with the alias 'klock' and email 'klock@user.com'.

- **Permission Set: Permission_Platform_1** to give extra access to selected users.

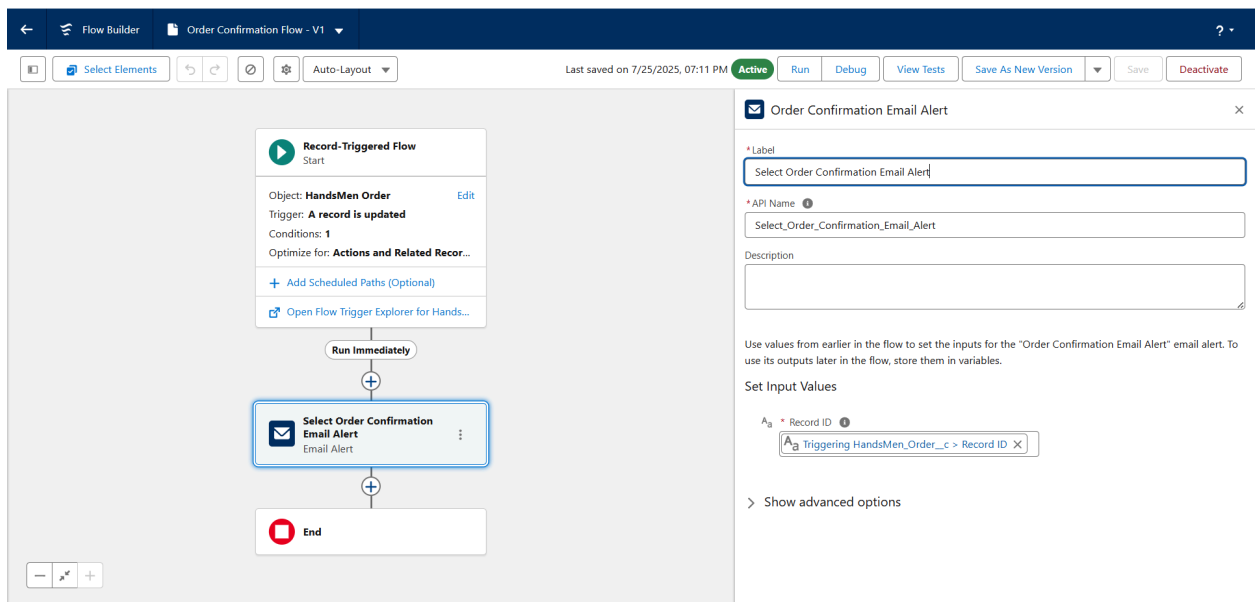


7. Automations

Flows

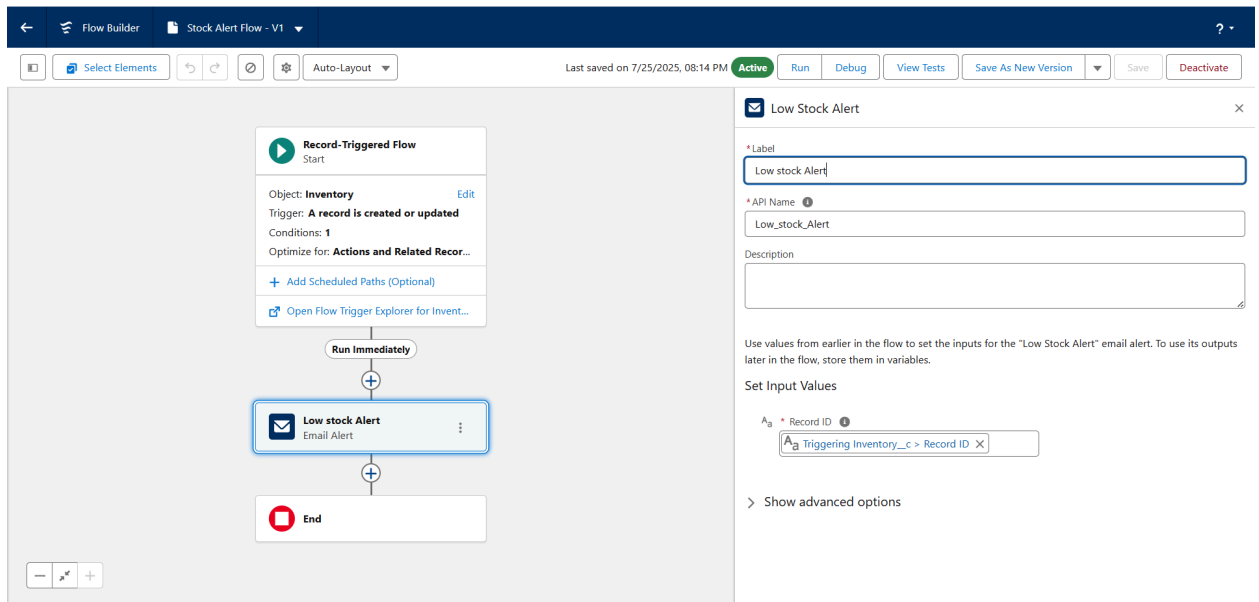
1. Order Confirmation Flow:

When an order is marked as **Confirmed**, an **email is automatically sent** to the customer.



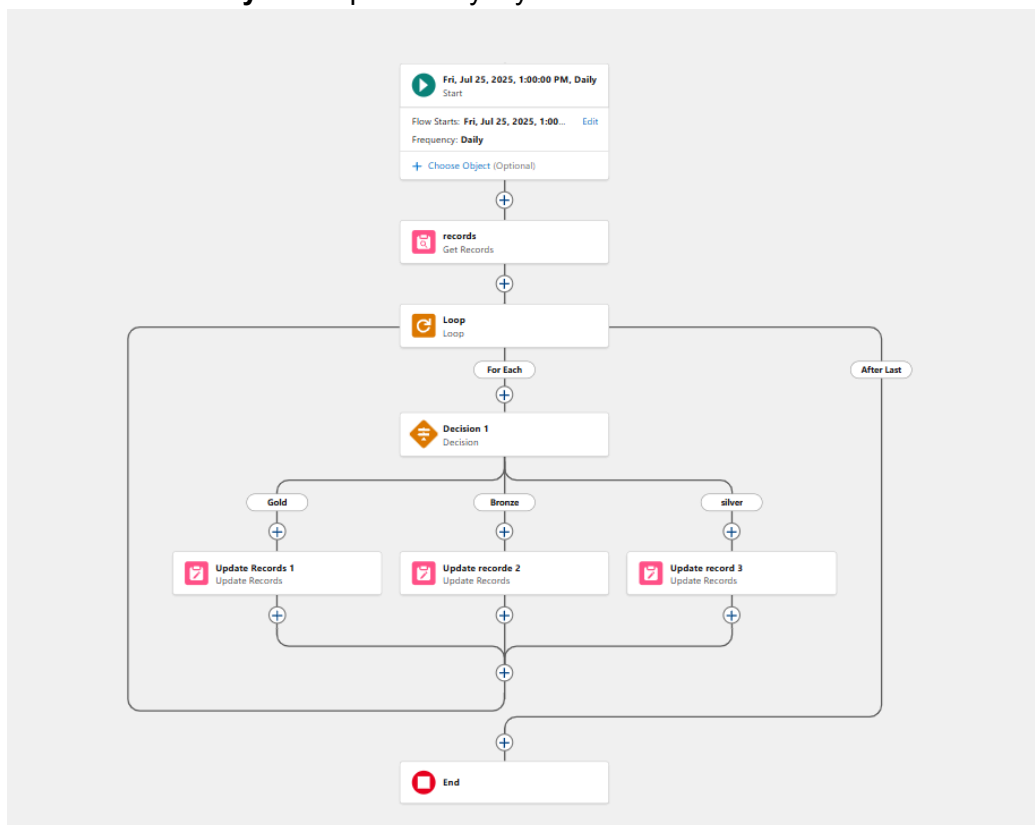
2. Stock Alert Flow:

When stock falls below 5, the inventory manager is notified.



3. Loyalty Program Flow:

A scheduled daily flow updates loyalty levels:



- Gold: Purchases > 1000

- Silver: Purchases between 500–1000



- Bronze: Purchases < 500

8. Apex Automations

Order Validation Trigger

When an order is saved, the system checks:

- Confirmed orders must have **Quantity > 500**.
- Pending orders must have **Quantity > 200**.
- Rejected orders must have **Quantity = 0**.

OrderTriggerHandler.apxc

```
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.');
```

OrderTrigger.apxt

```

trigger OrderTrigger on HandsMen_Order__c (before insert, before update) {

    if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {

        OrderTriggerHandler.validateOrderQuantity(Trigger.new);

    }

}
```

Batch Job for Inventory

- Runs daily to check products with **stock < 10**.
- Automatically **adds 50 units** to restock inventory.

InventoryBatchJob.apxc

```

global class InventoryBatchJob implements Database.Batchable<SObject>,
Schedulable {

global Database.QueryLocator start(Database.BatchableContext BC) {

return Database.getQueryLocator(

'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'

);
}

global void execute(Database.BatchableContext BC, List<SObject> records) {

List<HandsMen_Product__c> productsToUpdate = new
List<HandsMen_Product__c>();

// Cast SObject list to Product__c list

for (SObject record : records) {

HandsMen_Product__c product = (HandsMen_Product__c) record;

product.Stock_Quantity__c += 50; // Restock logic

productsToUpdate.add(product);

}

if (!productsToUpdate.isEmpty()) {

try {

update productsToUpdate;

} catch (DmlException e) {

System.debug('Error updating inventory: ' + e.getMessage());

}

}

}

```

```

}

global void finish(Database.BatchableContext BC) {

System.debug('Inventory Sync Completed');

}

// Scheduler Method

global void execute(SchedulableContext SC) {
InventoryBatchJob batchJob = new InventoryBatchJob();

Database.executeBatch(batchJob, 200);

}

}

```

- Scheduled using:

```

System.schedule('Daily Inventory Sync', '0 0 0 * * ?', new
InventoryBatchJob());

```

9. Email Templates

1. Order Confirmation Email – Sent

HTML Email Template
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	Untitled Public Classic Email Templates	Available For Use	✓
Email Template Name	Order Confirmation Email	Last Used Date	
Template Unique Name	Order_Confirmation_Email	Times Used	
Classic Letterhead	template		
Email Layout	Free Form Letter		
Encoding	Unicode (UTF-8)		
Author	Siva Manikanta Gudla (Change)		
Description			
Created By	Siva Manikanta Gudla, 7/25/2025, 1:11 AM	Modified By	Siva Manikanta Gudla, 7/25/2025, 1:11 AM

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

- when an order is confirmed.

Email Template

Send Test and Verify Merge Fields

Subject

Your Order has been Confirmed

HTML Preview

<p>Dear {!Order__c.Customer__c},</p>
<p>Your order #{!Order__c.Name} has been confirmed!</p>
<p>Thank you for shopping with us.</p>
<p>Best Regards,</p>
<p>Sales Team</p>

Plain Text Preview

<p>Dear {!Order__c.Customer__c},</p>
<p>Your order #{!Order__c.Name} has been confirmed!</p>
<p>Thank you for shopping with us.</p>
<p>Best Regards,</p>
<p>Sales Team</p>

3. Low Stock Alert – Sent when inventory falls below the threshold.

SETUP

Classic Email Templates

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

✓

Template Unique Name

Low_Stock_Alert

Last Used Date

Classic Letterhead

template

Times Used

Email Layout

Free Form Letter

Encoding

Unicode (UTF-8)

Author

Siva Manikanta Gudla [Change]

Description

Created By

Siva Manikanta Gudla, 7/25/2025, 1:15 AM

Modified By

Siva Manikanta Gudla, 7/25/2025, 1:15 AM

Edit Properties

Edit HTML Version

Edit Text Version

Delete

Clone

Email Template

Send Test and Verify Merge Fields

Email Template

Send Test and Verify Merge Fields

SubjectLow Stock Alert

HTML Preview

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

Plain Text Preview

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

4. Loyalty Program Email – Notifies customers about their loyalty status.

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	✓
Template Unique Name	Loyalty_Program_Email	Last Used Date	
Classic Letterhead	template	Times Used	
Email Layout	Free Form Letter		
Encoding	Unicode (UTF-8)		
Author	Siva Manikanta Gudla [Change]		
Description			
Created By	Siva Manikanta Gudla, 7/25/2025, 1:19 AM	Modified By	Siva Manikanta Gudla, 7/25/2025, 1:19 AM

Edit Properties

Edit HTML Version

Edit Text Version

Delete

Clone

Email Template

Send Test and Verify Merge Fields

Subject | Loyalty Program Email

HTML Preview

Congratulations! You are now a {!HandsMen_Customer__c.Loyalty_Status__c} 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.

Plain Text Preview	<p data-bbox="227 646 1205 716">Congratulations! You are now a {!HandsMen_Customer__c.Loyalty_Status__c} 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.</p>
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10. Benefits

- **Fully automated workflows** for orders and inventory.
- **Clean data entry** due to validation rules.
- **Customer satisfaction** via quick updates and loyalty rewards.
- **Time savings** with batch processing and scheduled jobs.

With this Salesforce implementation, **HandsMen Threads** now has:

- Automated **order and inventory management**.
- **Proactive customer communication** via email alerts.
- **Better visibility** into business operations and campaigns.