

Handsmen Threads – Salesforce CRM & Automation Implementation

Empowering Business Through Intelligent Automation

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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

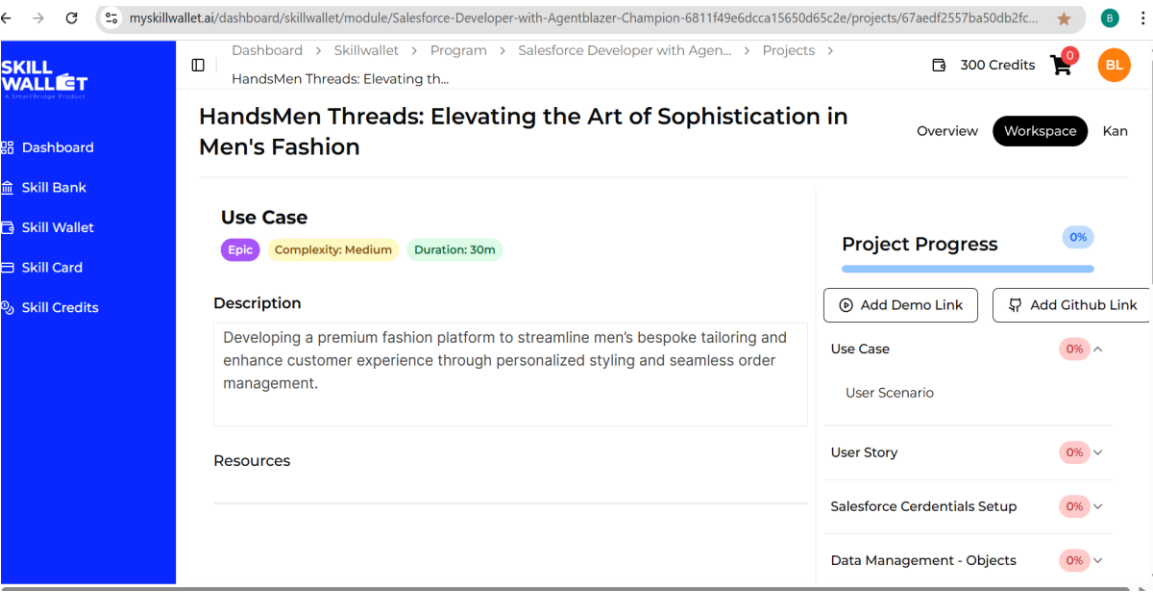
Key Results & Benefits

- 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



Screenshot:

