

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.

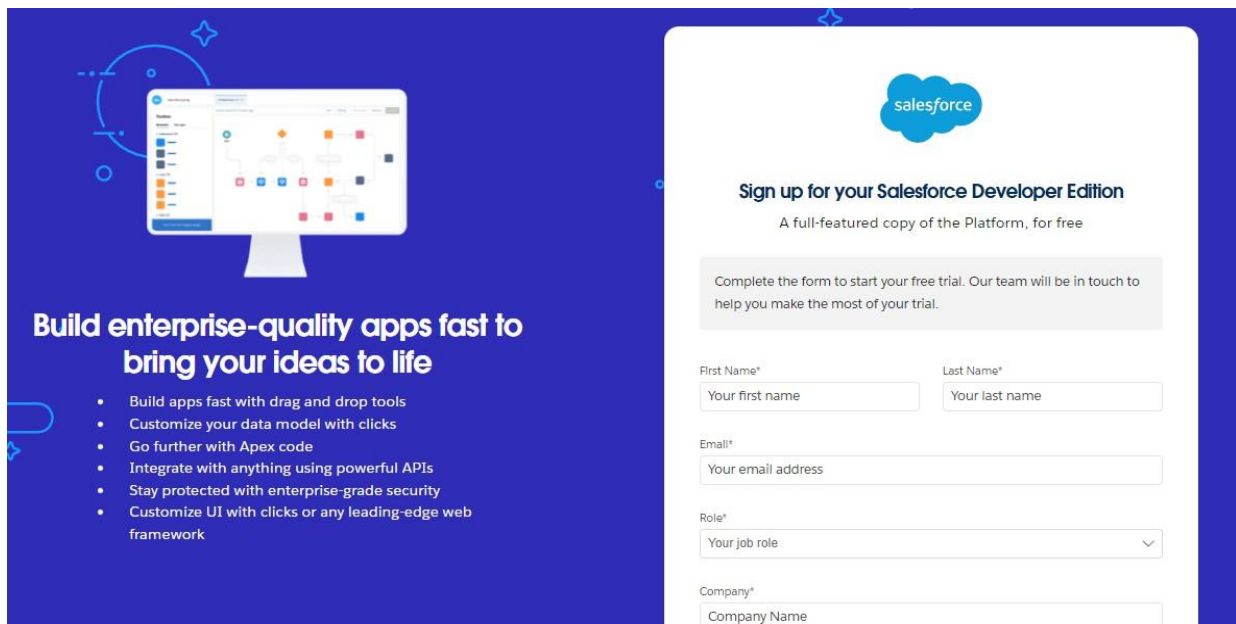
Example Triggers:

- 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>



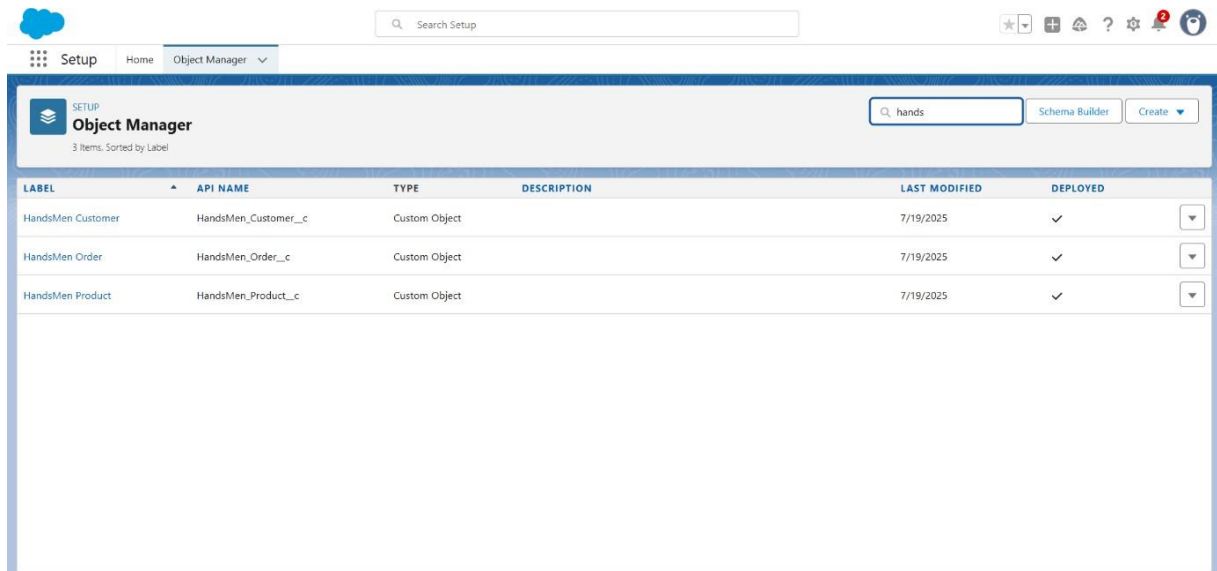
2. Custom Object Verification:

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

- Create User Go to setup → type users in quick find box → select users → click New user. Fill in the fields First Name : Niklaus Last Name : Mikaelson Alias : Give an Alias Name Email id : Give your Personal Email id Username : Username should be in this form: text@text.text Nick Name : Give a Nickname Role : Sales User license : Salesforce Platform Profiles : Platform 1

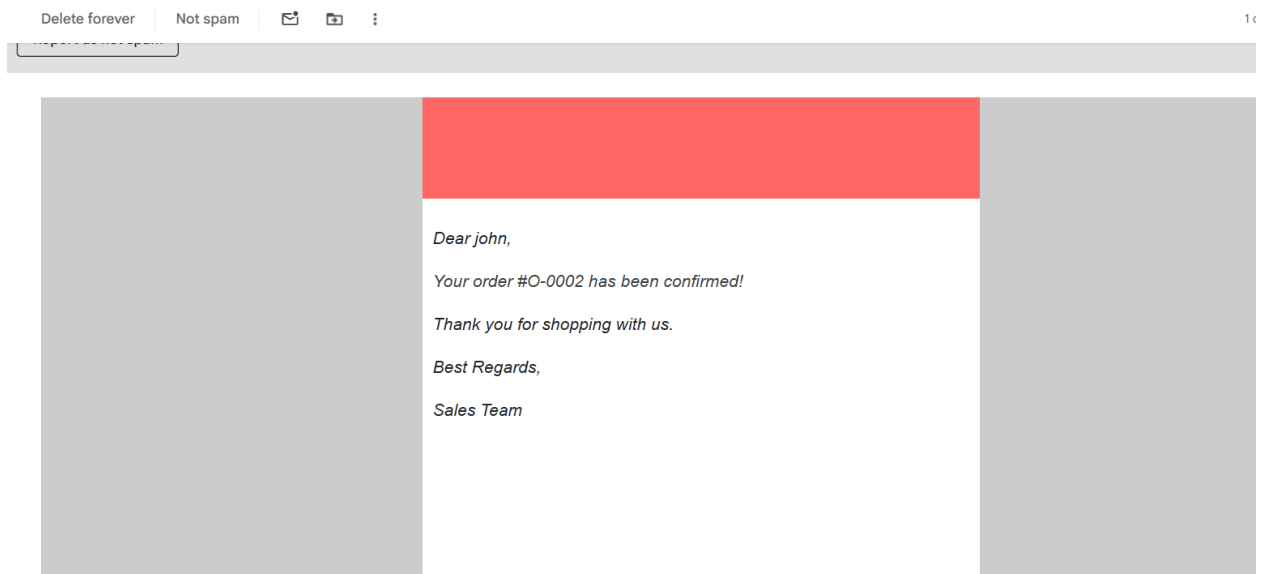
The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links for Setup Home, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Lightning Usage, Sales Cloud Everywhere, and Users. The main content area is titled 'All Users' and includes a search bar, a 'New User' button, and a table of existing users.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgh000007f0nuac.htensy6vnh@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIIC	epic.732d9c8354@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Kumar_Vivek	vix	vivekkmehra00877@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Mikaelson_Daniel	dmika	vivek123kumar2@gmail.com	Marketing	✓	Platform_1
<input type="checkbox"/> Edit	Mikaelson_Kol	kmika	vivek123kumar1@gmail.com	Inventory	✗	Platform_1
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	vivek123kumar@gmail.com	Sales	✓	Platform_1
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dgh000007f0nuac.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00dgh000007f0nuac.com		✓	Analytics Cloud Security User

6. Email Template

Created Three Email Template:

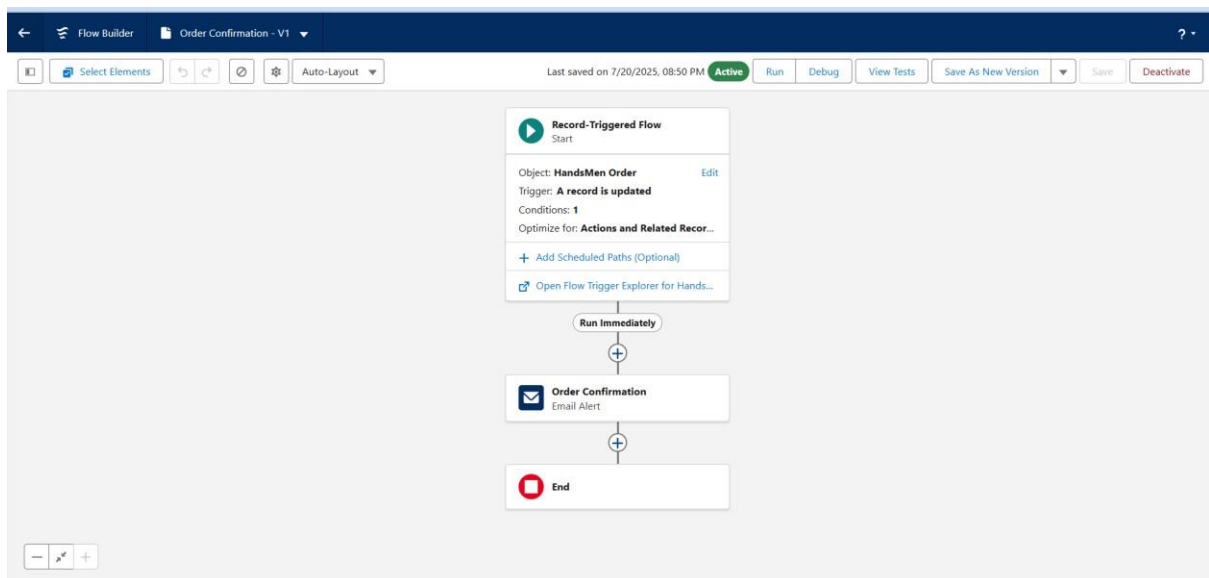
- Order Confirmation Email Template
- Stock Alert Email Template
- Loyalty Status Email Template



7. Flows

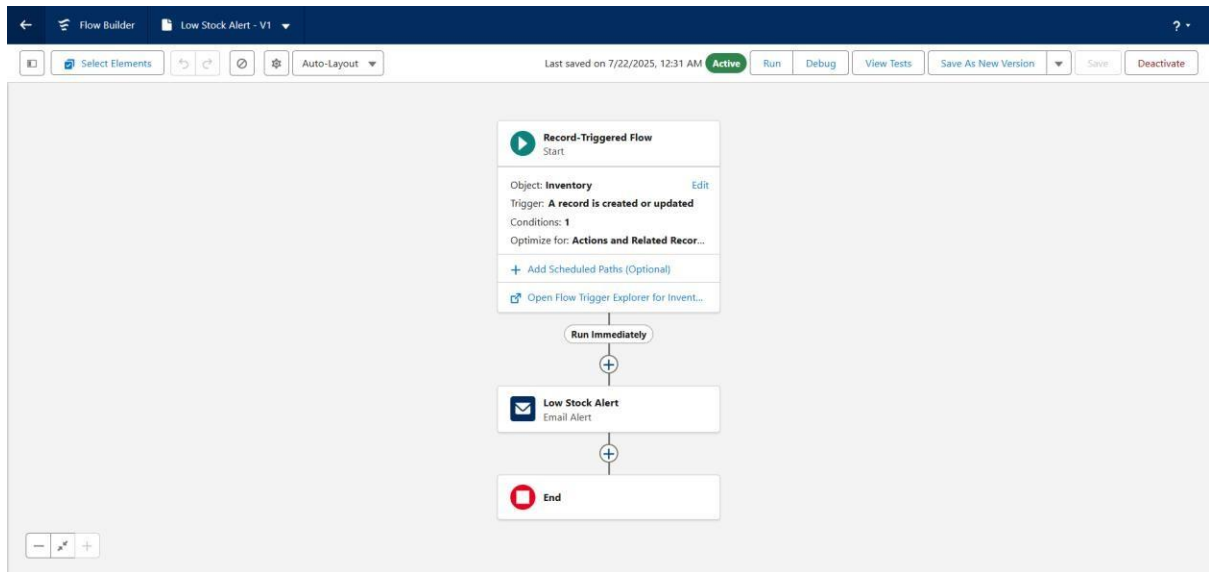
- **Order Confirmation Flow:**

Record Trigger Flow, Triggered when the order is confirmed



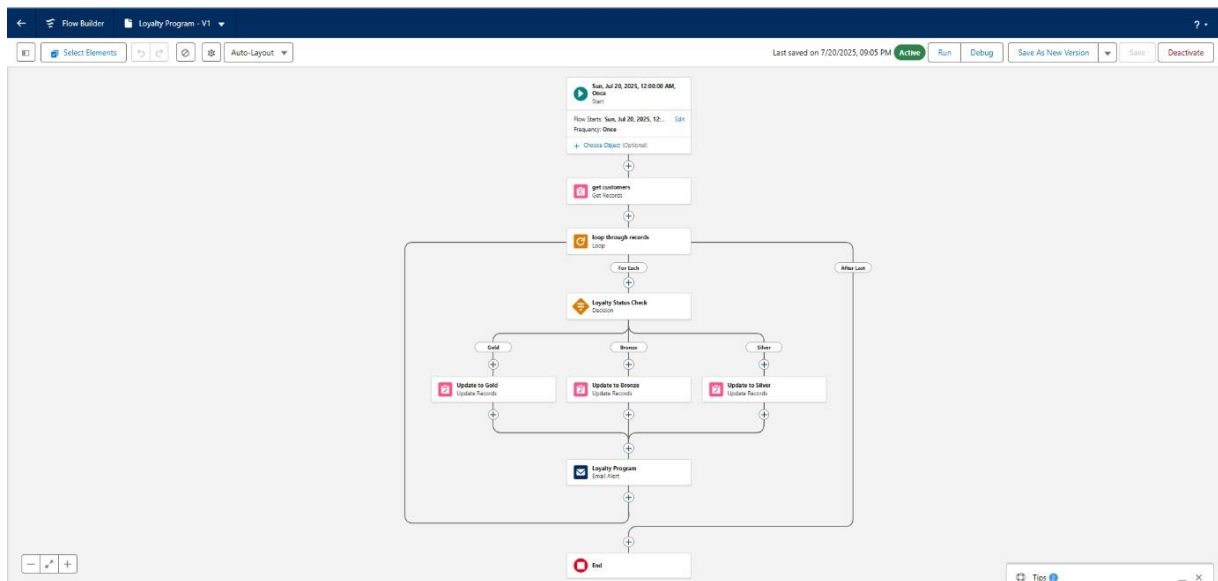
- **Stock Alert Flow:**

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

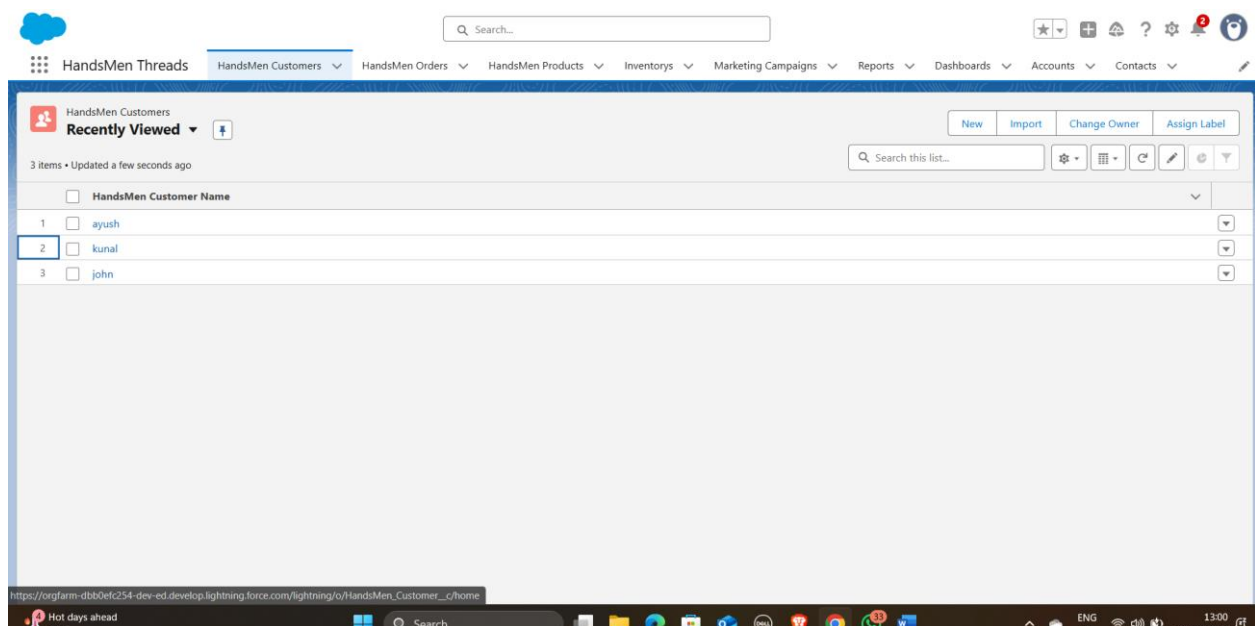


Fig: Custom App For Handsmen Thread

HandsMen Customer
ayush

Related **Details**

HandsMen Customer Name	ayush	Owner	Vivek Kumar
Email	vivek123kumarmehta@gmail.com		
Phone			
Loyalty Status	Silver		
FirstName	ayush		
LastName	b		
FullName	ayush b		
Total Purchases	600		
Created By	Vivek Kumar, 7/23/2025, 11:47 PM	Last Modified By	Vivek Kumar, 7/23/2025, 11:47 PM

Fig: Handsmen Customer

HandsMen Order
O-0005

Related **Details**

HandsMen OrderNumber	O-0005	Owner	Vivek Kumar
HandsMen Product	jeans		
HandsMen Customer	ayush		
Status	Confirmed		
Quantity	100		
Total Amount	500		
Customer Email	vivekkrmehta00@gmail.com		
Created By	Vivek Kumar, 7/23/2025, 11:49 PM	Last Modified By	Vivek Kumar, 7/24/2025, 12:23 AM

Fig: Handsmen Orders

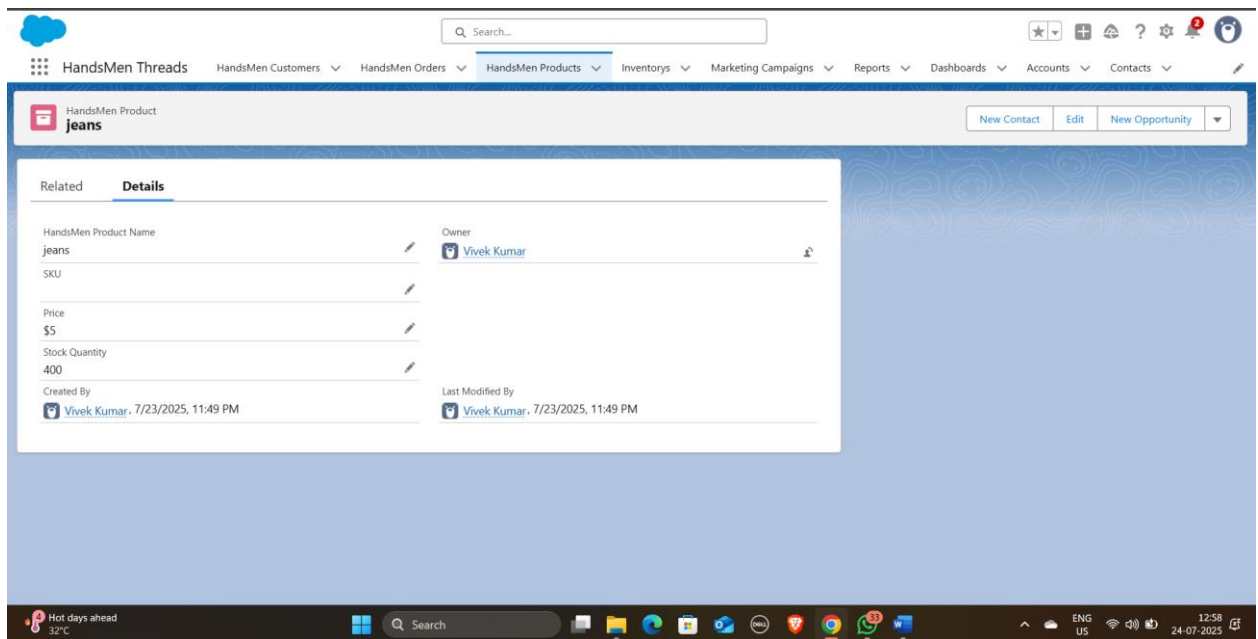


Fig: Handsmen Products

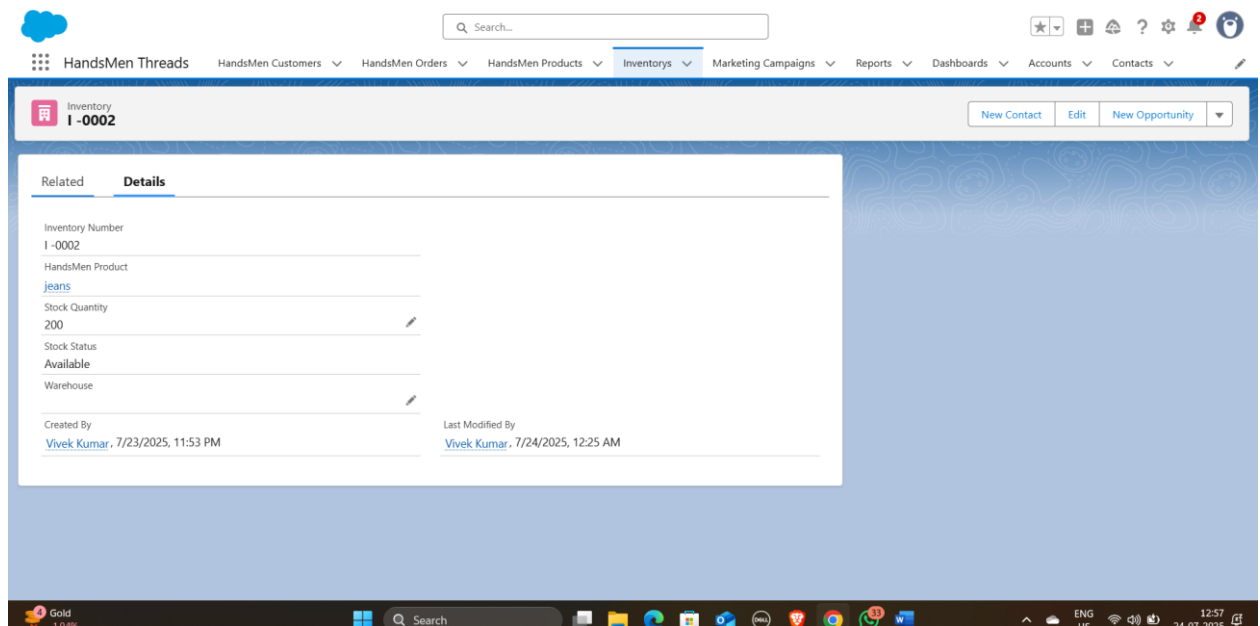


Fig: Inventorlys

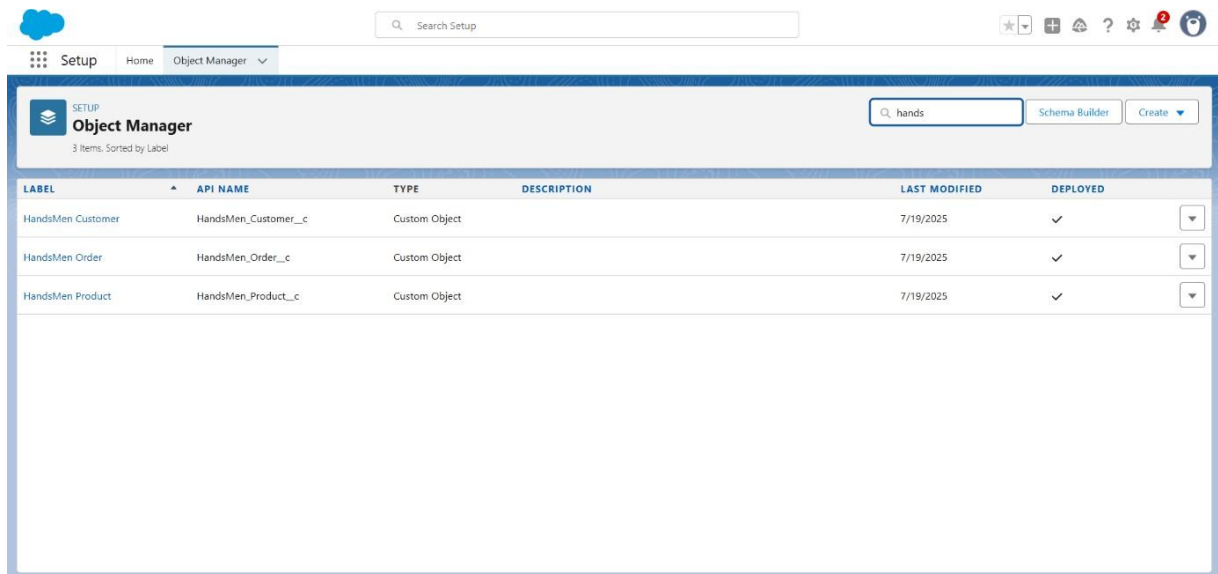


Fig: Custom Objects

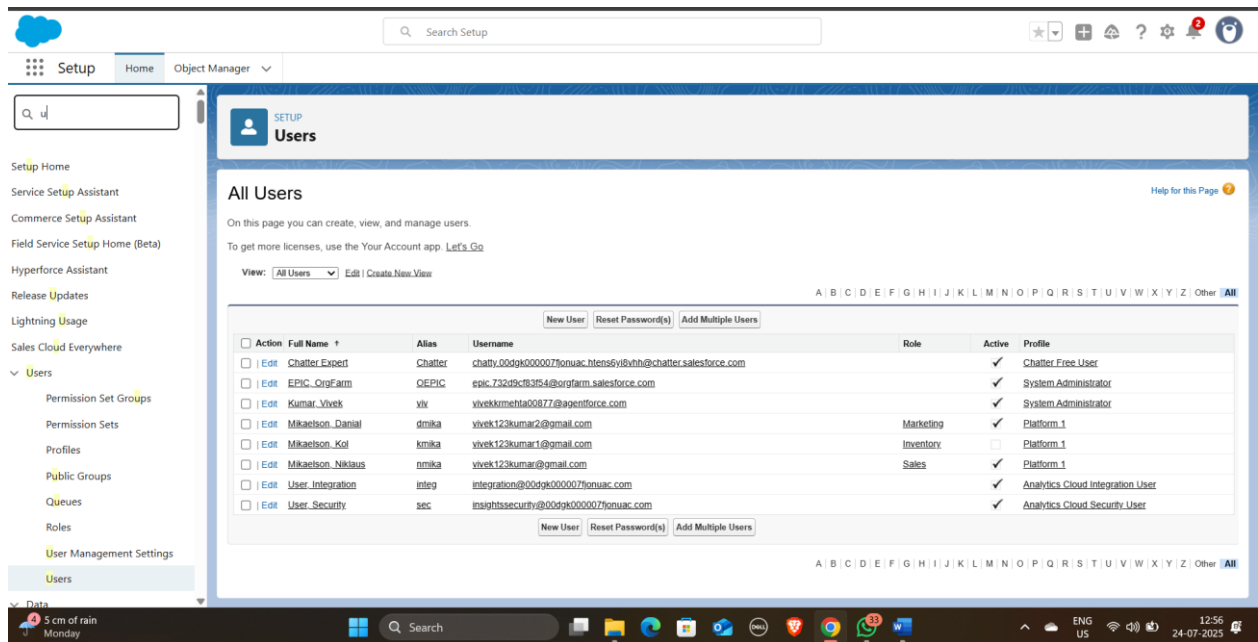


Fig: Users

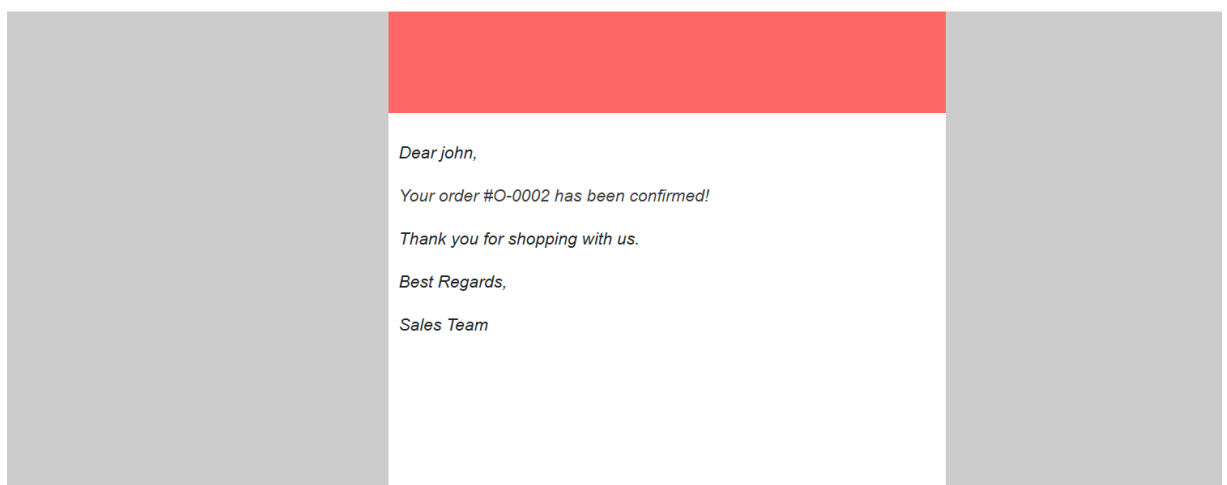
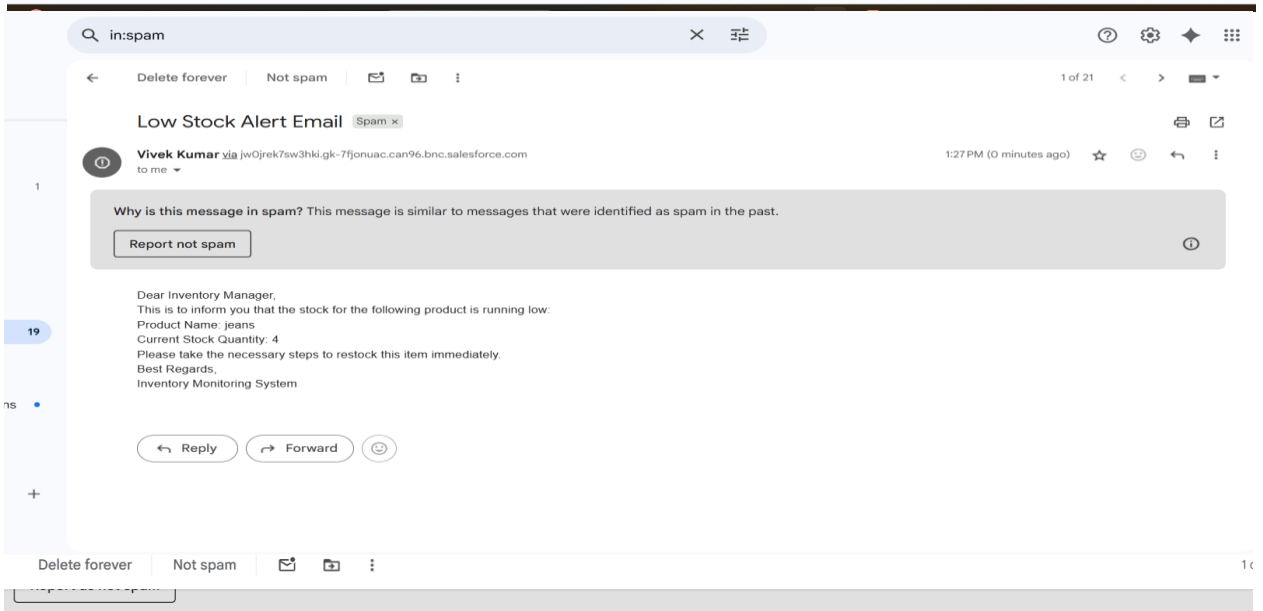
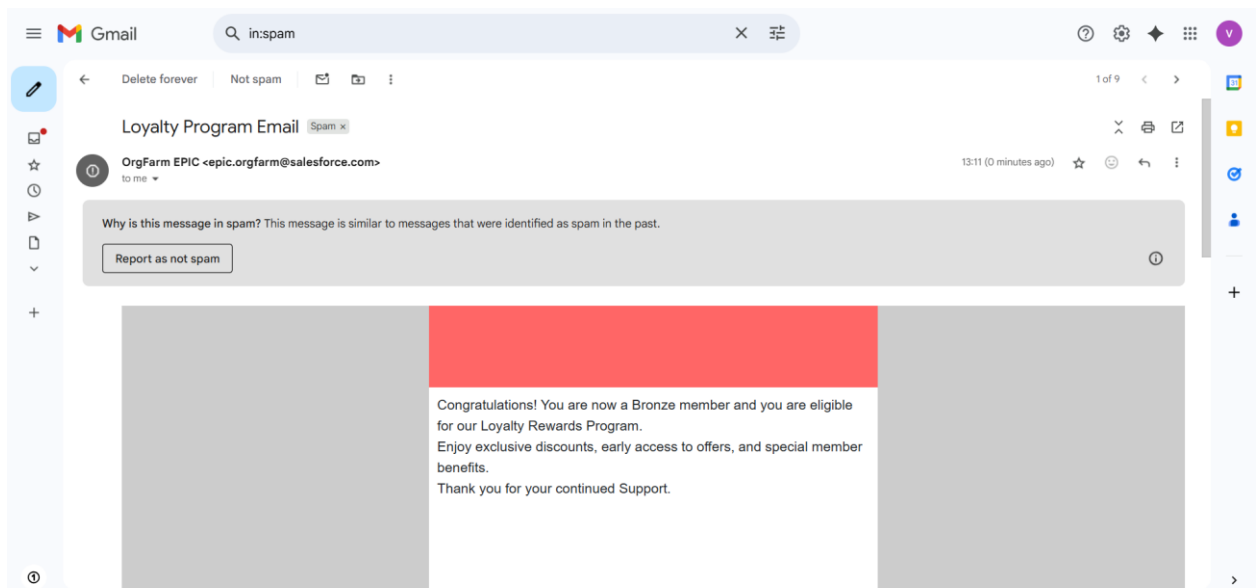


Fig: All Email Alerts

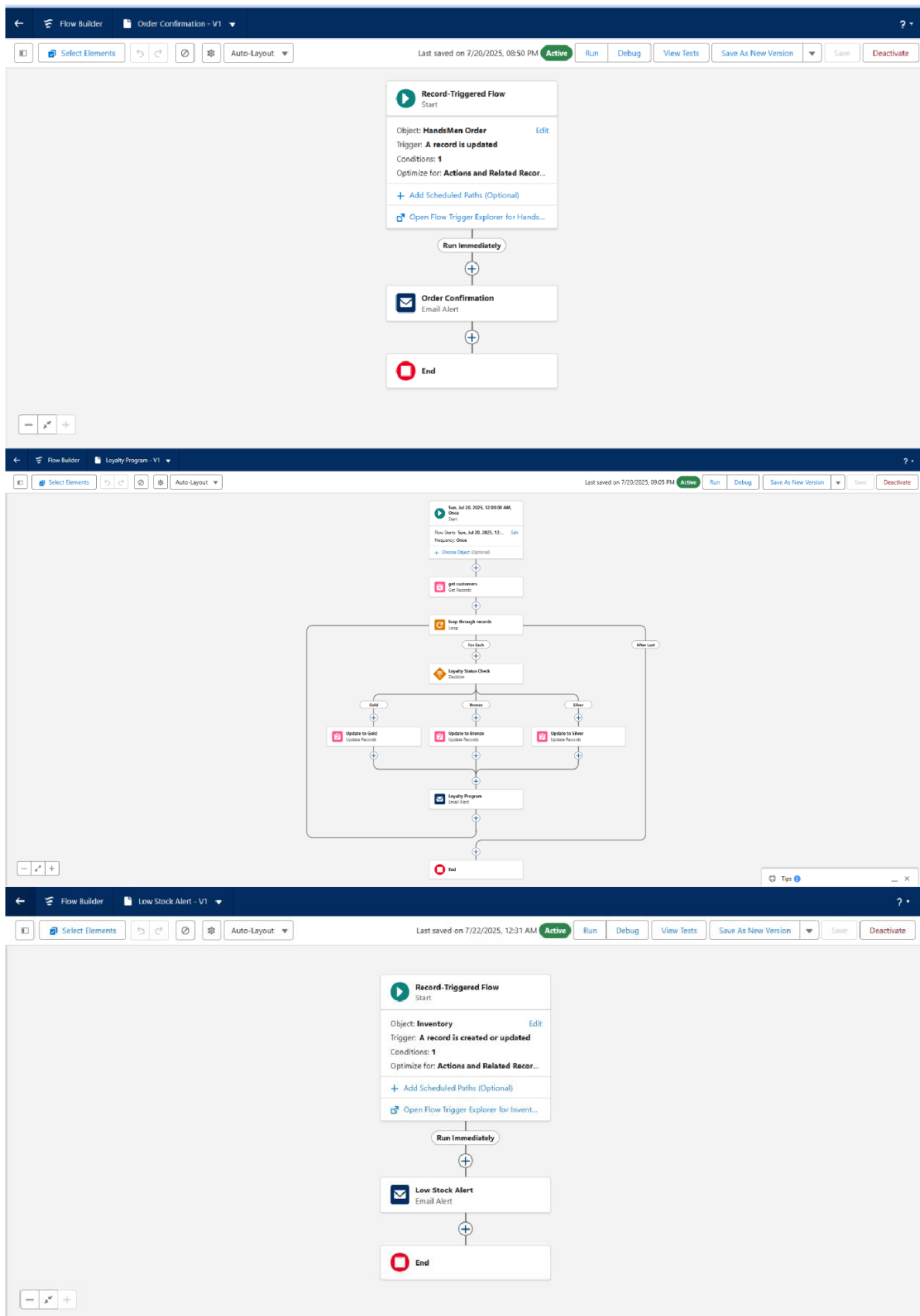


Fig: All Flows

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 relationship

