

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

Use Case

HandsMen Threads is a dynamic organization in the fashion industry embarking on a Salesforce CRM implementation designed to revolutionize data management and enhance customer relations.

The project aims to build a robust data model to store essential business data, ensuring smooth information flow across departments. A core focus is on maintaining data integrity directly from the user interface, ensuring accurate, consistent, and reliable records to support effective decision-making and efficient operations.

The system also integrates automation processes to improve customer service and operational efficiency.

Key Features

- **Automated Order Confirmations** – Customers receive email confirmations after order placement, improving communication.
- **Dynamic Loyalty Program** – Loyalty status updates automatically based on purchase history.
- **Stock Alerts** – The warehouse team receives alerts when stock levels drop below threshold.
- **Scheduled Bulk Order Updates** – Nightly updates ensure inventory and financial data accuracy.

User Story

The Salesforce project aims to automate core business processes for HandsMen Threads. By building a data model integrating automation, the system will efficiently operate customer service, inventory management, and financial operations. This ensures efficiency, reliability and customer services.

Project Overview

Phase 1: Architecture & Planning

- Define objects, fields, relationships, formula fields.
- Establish validation rules, flows, Apex triggers, batch jobs.
- Design email templates for notifications and customer communication.

Phase 2: Development

- Object and field creation.

- Set up data security and sharing rules.
- Implement automation such as (flows, process builders, Apex triggers).
- Develop batch jobs for scheduled processing.
- Configure email templates and notifications.

Phase 3: Testing & QA

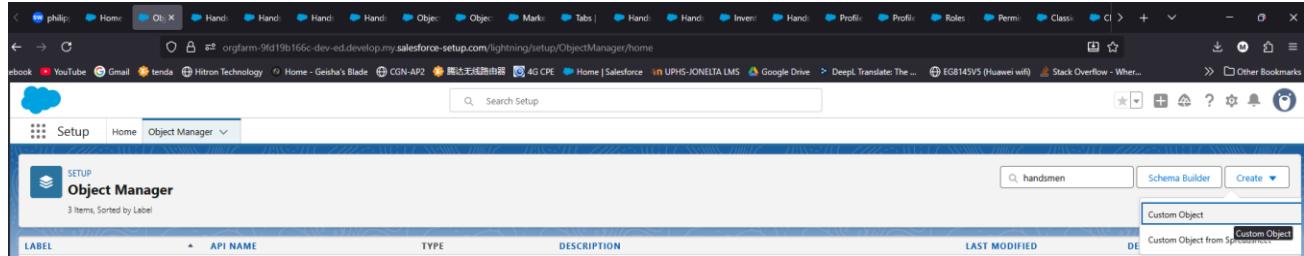
- Unit testing of objects and automation.
- End-to-end testing with sample data.
- Performance testing and security checks.

Phase 4: Deployment & Training

- Deploy to production.
- Train users on new functionality.
- live support and monitoring.

Data Management

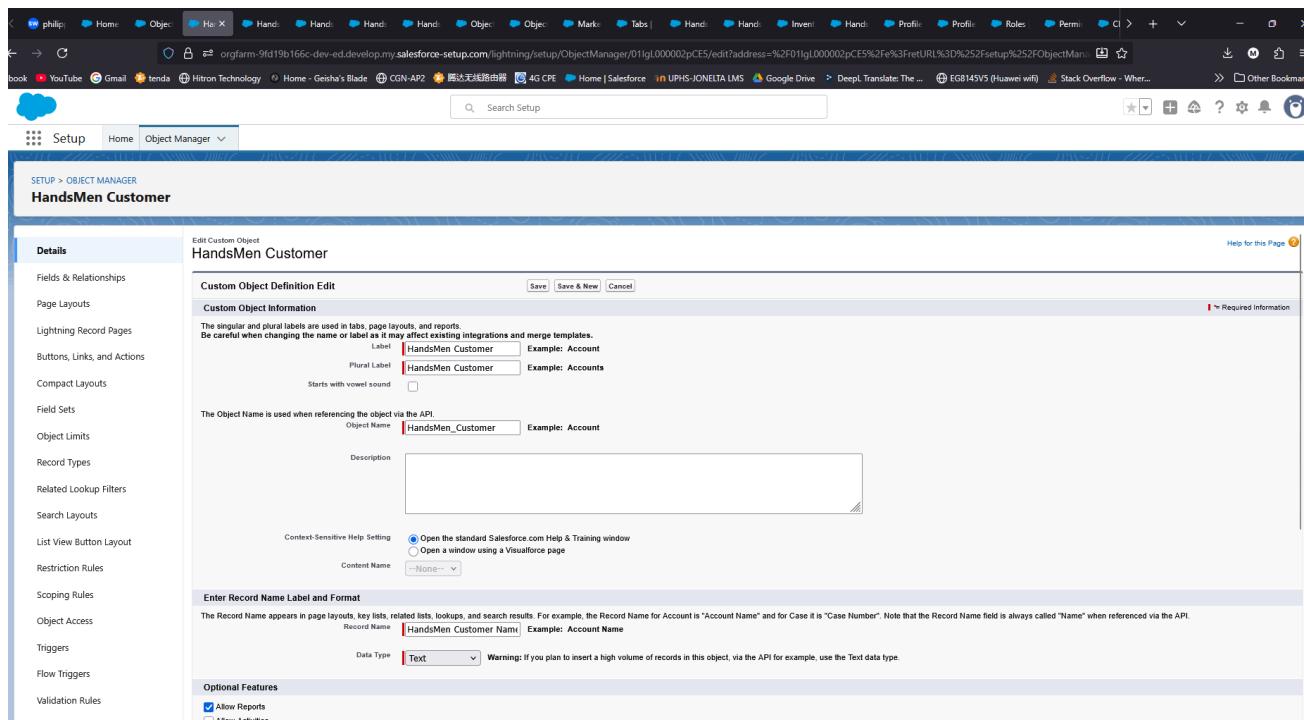
Objects:



The screenshot shows the Salesforce Object Manager page. At the top, there's a search bar with the text "handsmen". Below the search bar is a table header with columns: Label, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. A row in the table is highlighted with a blue background, showing "Custom Object" in the Type column.

In the **Object Manager** tab, click the **Create** button and select **Custom Object**.

1. HandsMen Customer



The screenshot shows the "Edit Custom Object" page for "HandsMen Customer". The left sidebar lists various object settings like Fields & Relationships, Page Layouts, and Record Types. The main form has sections for Custom Object Information (Label: HandsMen Customer, Plural Label: HandsMen Customer), Object Name (HandsMen_Customer), and Description (a large text area). Under Optional Features, the "Allow Reports" checkbox is checked.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** philip... Home Object Help Hand Hand Hand Hand Hand Object Object Marks Tabs Hand Invent Hand Profil Profil Roles Permis Cl > + - X
- Address Bar:** orgfarm-9fd19b166c-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01gl000002pCE5%2Fe%3FretURL%3D%252Fsetup%252FObjectMan...
- Search Bar:** Search Setup
- Breadcrumbs:** SETUP > OBJECT MANAGER
- Section:** HandsMen Customer
- Details Tab:**
 - Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (radio button selected)
 - Content Name:** None
- Enter Record Name Label and Format:**
 - Record Name:** HandsMen Customer Name (Example: Account Name)
 - Data Type:** Text (Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.)
- Optional Features:**
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing
- Object Classification:**
 - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)
 - Allow Sharing
 - Allow Bulk API Access
 - Allow Streaming API Access
- Deployment Status:**
 - In Development
 - Deployed
- Search Status:**
 - When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)
 - Allow Search
- Buttons:** Save, Save & New, Cancel

In the Custom Object Information section:

- **Label:** HandsMen Customer
- **Plural Label:** HandsMen Customer
- **Object Name:** HandsMen_Customer

In the Record Name Label and Format section:

- **Record Name:** HandsMen Customer Name
- **Data Type:** Text

In the Optional Features section:

- Select **Allow Reports**

In the Search Status section:

- Select **Allow Search**

Click the **Save** button to create the custom object.

2. HandsMen Product

3.

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: HandsMen Product **Plural Label:** HandsMen Products **Example:** Account **Example:** Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API:

Object Name: HandsMen_Product **Example:** Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: HandsMen Product Name **Example:** Account Name

Data Type: Text **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Deployment Status

In Development Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

In the Custom Object Information section:

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing Allow Bulk API Access Allow Streaming API Access

Deployment Status

In Development Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

- **Label:** HandsMen Product
- **Plural Label:** HandsMen Products
- **Object Name:** HandsMen_Product

In the Record Name Label and Format section:

- **Record Name:** HandsMen Product Name
- **Data Type:** Text

In the Optional Features section:

- Select **Allow Reports**

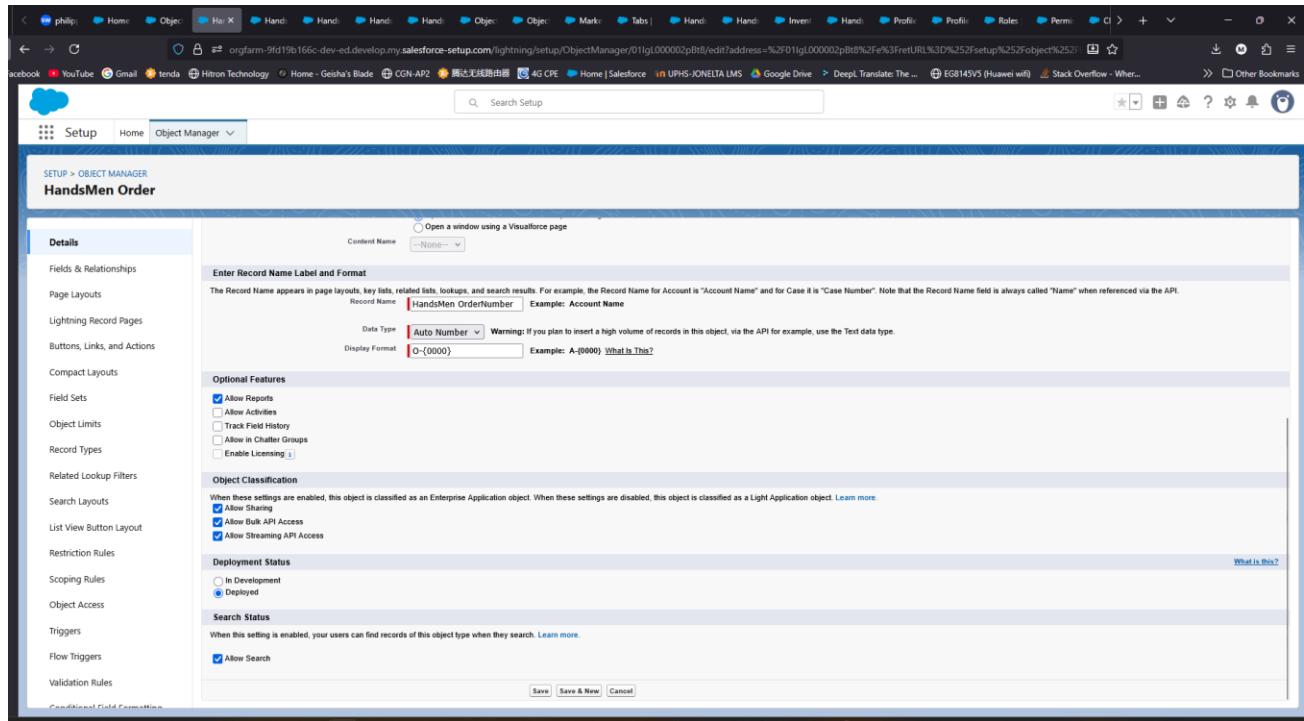
In the Search Status section:

- Select **Allow Search**

Click the **Save** button to create the custom object.

4. HandsMen Order

The screenshot shows the 'Edit Custom Object' screen for the 'HandsMen Order' object. The 'Custom Object Information' section contains fields for 'Label' (HandsMen Order), 'Plural Label' (HandsMen Orders), and 'Object Name' (HandsMen_Order). The 'Record Name Label and Format' section includes fields for 'Record Name' (HandsMen OrderNumber), 'Data Type' (Auto Number), and 'Display Format' (0-(0000)). The 'Optional Features' section has a checked 'Select Allow Reports' option. The left sidebar lists various object settings like Fields & Relationships, Page Layouts, and Validation Rules.



In the Custom Object Information section:

- **Label:** HandsMen Order
- **Plural Label:** HandsMen Orders
- **Object Name:** HandsMen_Order

In the Record Name Label and Format section:

- **Record Name:** HandsMen OrderNumber
- **Data Type:** Auto Number
 - **Display Format:** O-{0000}
 - **Starting Number:** 001

In the Optional Features section:

- Select **Allow Reports**

In the Search Status section:

- Select **Allow Search**

Click the **Save** button to create the custom object.

5. Inventory

The screenshot shows the 'Edit Custom Object' screen for the 'Inventory' object. The 'Custom Object Information' section includes fields for 'Label' (Inventory), 'Plural Label' (Inventorys), and 'Object Name' (Inventory). The 'Description' field is empty. Under 'Content Name', the 'None' option is selected. The 'Record Name' field contains 'Inventory Number' and the 'Display Format' field contains 'I-{0000}'.

6.

The screenshot shows the 'Edit Custom Object' screen for the 'Inventory' object. The 'Optional Features' section has 'Allow Reports' checked, while others like 'Allow Activities' and 'Allow Bulk API Access' are unchecked. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has 'Allow Search' checked. The 'Content Name' dropdown is set to 'None'.

In the Custom Object Information section:

- **Label:** Inventory
- **Plural Label:** Inventories
- **Object Name:** Inventory

In the Record Name Label and Format section:

- **Record Name:** Inventory Number
- **Data Type:** Auto Number
 - **Display Format:** I-{0000}
 - **Starting Number:** 001

In the Optional Features section:

- Select **Allow Reports**

In the Search Status section:

- Select **Allow Search**

Click the **Save** button to create the custom object.

7. Marketing Campaign

The screenshot shows the 'Marketing Campaign' object definition in the Salesforce Setup. The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Record Types. The main panel displays the 'Custom Object Definition Edit' for 'Marketing Campaign'. It includes fields for Label (Marketing Campaign), Plural Label (Marketing Campaigns), Object Name (Marketing_Campaign), Description (empty), Context-Sensitive Help Setting (Open the standard Salesforce.com Help & Training window selected), Content Name (None), Record Name (Marketing Campaign Num!), Data Type (Auto Number selected), Display Format (MC-{0000}), and Optional Features (Allow Reports checked). A note at the bottom of the panel states: 'The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.'

8.

This screenshot shows the same 'Marketing Campaign' object definition screen as above, but with more detailed configurations. It includes the 'Optional Features' section with checkboxes for Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, and Enable Licensing (which has a 'What is This?' link). Below this is the 'Object Classification' section, which notes that the object is classified as an Enterprise Application object. It also includes the 'Deployment Status' section where 'Deployed' is selected. The 'Search Status' section indicates that users can find records of this object type when they search. The bottom of the panel contains 'Save' and 'Cancel' buttons.

In the Custom Object Information section:

- **Label:** Marketing Campaign
- **Plural Label:** Marketing Campaigns
- **Object Name:** Marketing_Campaign

In the Record Name Label and Format section:

- **Record Name:** Marketing Campaign Number
- **Data Type:** Auto Number
 - **Display Format:** MC-{0000}
 - **Starting Number:** 001

In the Optional Features section:

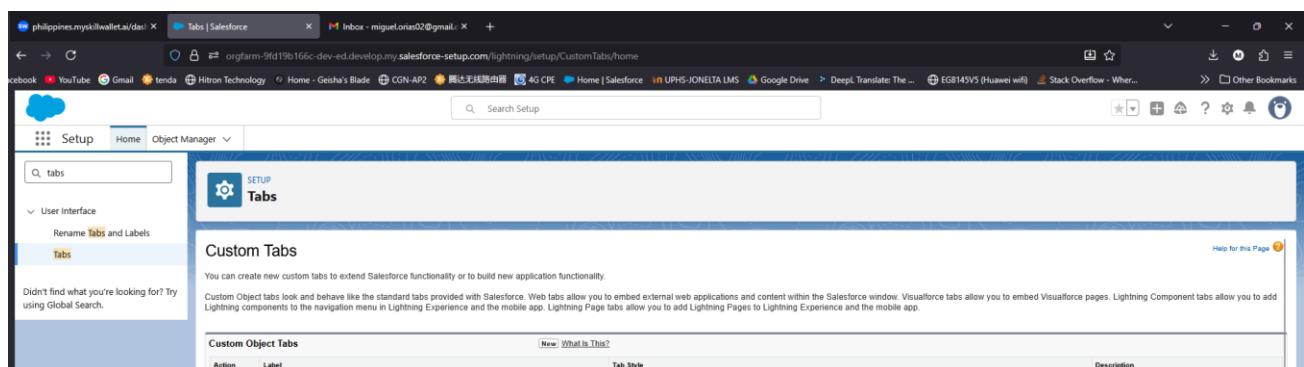
- Select **Allow Reports**

In the Search Status section:

- Select **Allow Search**

Click the **Save** button to create the custom object.

Tabs:



In **Quick Find**, search for **Tabs**, then in the Tabs setup, click the **New** button under Custom Object Tabs.

The screenshots illustrate the process of creating a custom tab in Salesforce. In the first screenshot, we are in the 'Edit Custom Object Tab' section for the 'HandsMen Customer' object. We have chosen 'HandsMen Customer' for both the Tab Label and Object fields, and selected the 'Balls' style from the Tab Style dropdown. In the second screenshot, we are viewing the 'Custom Tabs' page, which lists all defined tabs along with their respective labels and styles.

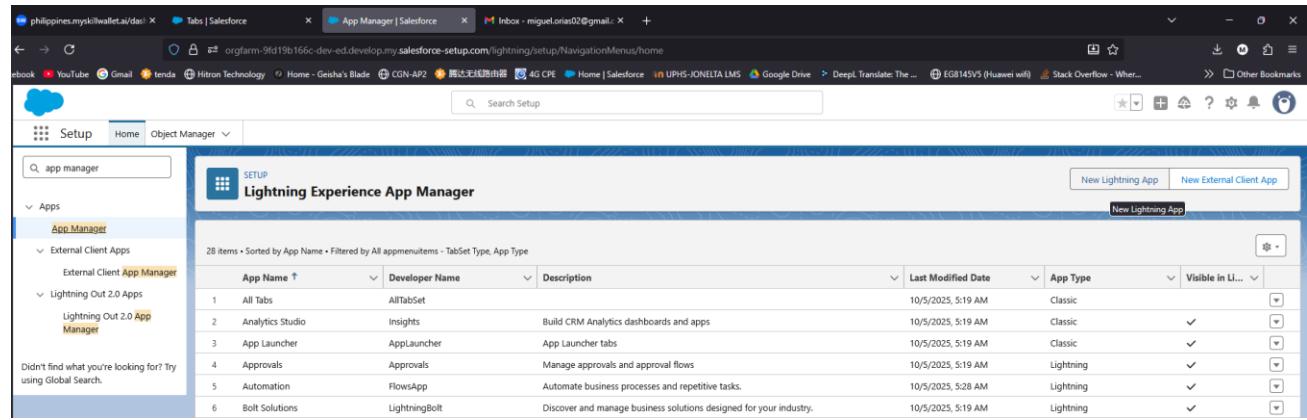
In Step 1, select the object **HandsMen Customer**. For Tab Style, choose any style, then proceed to Step 3 and click the **Save** button.

Repeat the same process for the following objects:

- HandsMen Order
- HandsMen Product
- Inventory
- Marketing Campaign

App Manager:

HandsMen Threads

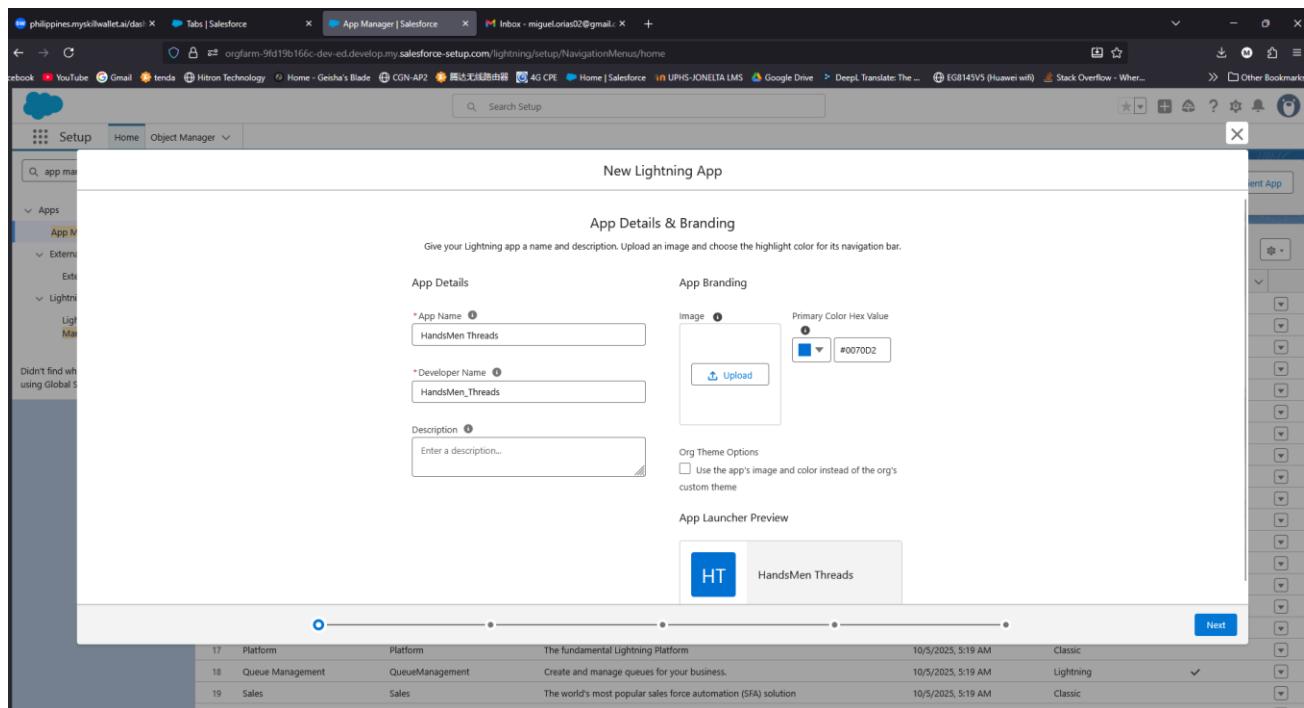


The screenshot shows the Salesforce Lightning Experience App Manager setup page. The left sidebar has a search bar and navigation links for Setup, Home, and Object Manager. Under Apps, the 'App Manager' link is selected. The main content area is titled 'Lightning Experience App Manager' and displays a table of 28 items. The table columns are: App Name, Developer Name, Description, Last Modified Date, App Type, and Visible in Li... (with a dropdown arrow). The table rows include:

App Name	Developer Name	Description	Last Modified Date	App Type	Visible in Li...
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	10/5/2025, 5:19 AM	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	10/5/2025, 5:19 AM	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	10/5/2025, 5:19 AM	Classic	✓
Approvals	Approvals	Manage approvals and approval flows	10/5/2025, 5:19 AM	Lightning	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	10/5/2025, 5:28 AM	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	10/5/2025, 5:19 AM	Lightning	✓

In **Quick Find**, search for **App Manager**, and in the Lightning Experience App Manager setup, click the **New Lightning App** button.

1. Step 1



In **App Details**, enter the following:

- **App Name:** HandsMen Threads
- **Developer Name:** HandsMen_Threads
- **Description:** Enter any description you prefer.

After that, click **Next** button until you reach Step 4.

2. Step 4

The screenshot shows the 'App Settings' page with the 'Pages' tab selected. The title 'HandsMen Threads' is at the top right. Below it, the heading 'Navigation Items' is followed by a descriptive text: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.'

The interface consists of two main sections: 'Available Items' on the left and 'Selected Items' on the right. A search bar labeled 'Type to filter list...' is at the top of the available items list. The 'Available Items' list contains 20 items with icons: Action Hub, Activation Targets, Activations, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Approval Submission Details, Approval Submissions, Approval Work Items, Asset Action Sources, and Asset Actions. The 'Selected Items' list contains 9 items: HandsMen Customer, HandsMen Orders, HandsMen Products, Inventorys, Marketing Campaigns, Reports, Dashboards, Accounts, and Contacts. There are also arrows for moving items between lists.

Add the following items to the app:

- **HandsMen Customer**
- **HandsMen Orders**
- **HandsMen Products**
- **Inventorys**
- **Reports**
- **Dashboards**
- **Account**
- **Contacts**

- **Marketing Campaigns**

3. Step 5

The screenshot shows the 'User Profiles' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings' options: App Details & Branding, App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles (which is currently selected). The main area is titled 'User Profiles' with the sub-instruction: 'Choose the user profiles that can access this app.' Below this, a 'Available Profiles' list contains numerous user profile names, each with a small preview icon. A search bar at the top of this list allows filtering. To the right, a 'Selected Profiles' panel shows a single profile named 'System Administrator'. Two small arrows between the two panels indicate that profiles can be moved between them.

Add System Administrator then click Save & Finish.

Fields:

The screenshot shows the 'Object Manager' tab in the Salesforce setup interface. The search bar at the top right contains the text 'handsmen customer'. The main table displays one item: 'HandsMen Customer' (Label), 'HandsMen_Customer_c' (API Name), 'Custom Object' (Type), and '10/12/2025' (Last Modified). There is also a 'DEPLOYED' column with a checkmark. The table has columns for Label, API Name, Type, Description, Last Modified, and Deployed.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Customer	HandsMen_Customer_c	Custom Object		10/12/2025	✓

In the **Object Manager** tab, search for **HandsMen Customer**, then click on it to open the object settings.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		

In the HandsMen Customer object settings, click **Fields & Relationships**, then click the **New** button to create a new custom field.

1. Email

Data Type

- None Selected
- Auto-Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent

In Step 1, select the **Email** data type, then click the **Next** button.

Field Label	<input type="text" value="Email"/>	Data Type	Email
Field Name	<input type="text" value="Email"/>		
Description	<input type="text"/>		
Help Text	<input type="text"/>		
Data Owner	User	<input type="text"/>	
Field Usage	--None--	<input type="button" value="▼"/>	
Data Sensitivity Level	--None--	<input type="button" value="▼"/>	
Compliance Categorization	Available PII HIPAA GDPR PCI		Chosen

In **Step 2**, put **Email** in Field Label and in Field Name, then proceed to the last step and click the **Save** button.

2. Phone

HandsMen Customer

Fields & Relationships

Phone

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The master record is required on all detail records.
- The ownership and sharing of a detail record is determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce organization.

Phone

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example: '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:00:800" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

In Step 1, select the Phone data type, then click the Next button.

HandsMen Customer

New Custom Field

Step 2. Enter the details

Phone

Field Label:

Field Name:

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax: Enclose text and position value with quotes ("One", "Two"), include numbers without quotes (123), allow periods as decimals (.10), and square brackets for collections (Record[1]). To reference a field from a Custom Metadata type record use \$CustomMetadata_Type__md Record[Name] Field__l

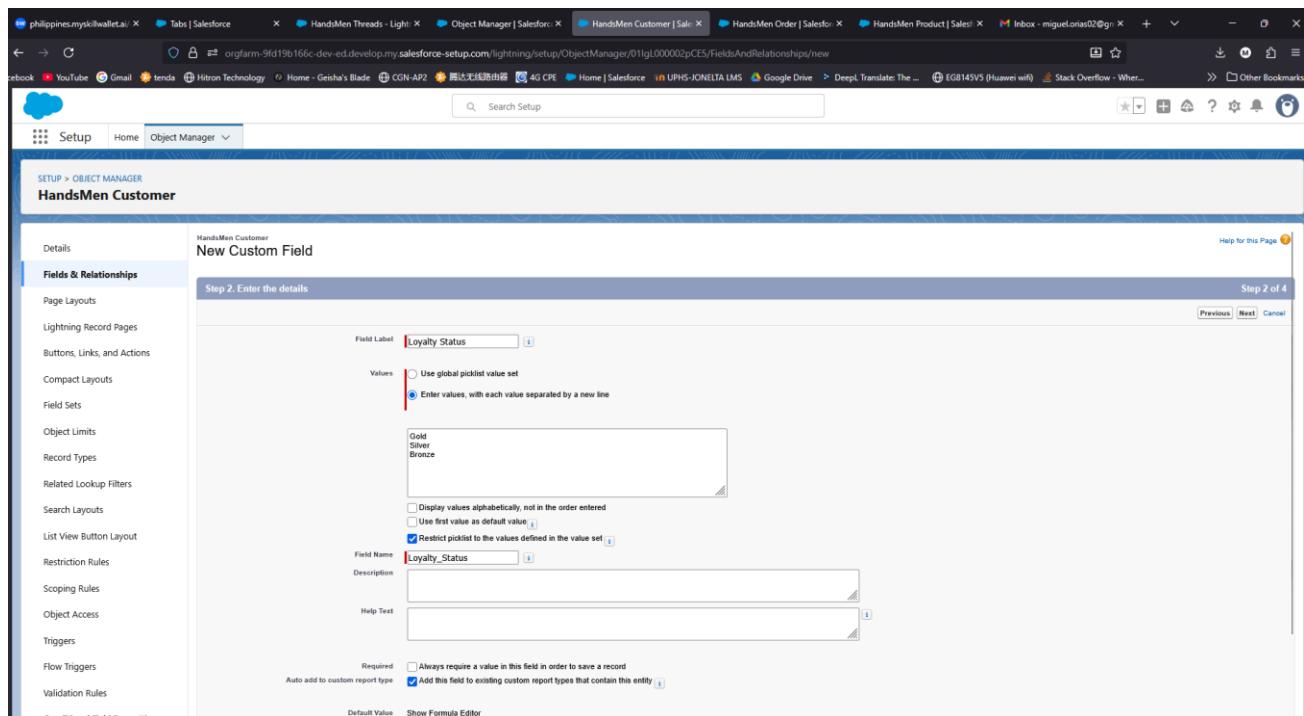
In Step 2, put **Phone** in Field Label and in Field Name, then proceed to the last step and click the **Save** button.

3. Loyalty Status

The screenshot shows the Salesforce Setup interface with the path "SETUP > OBJECT MANAGER > HandsMen Customer". On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The "Fields & Relationships" section is selected. On the right, a list of field types is shown with their descriptions:

- Formula: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.
 - The relationship field is required on all detail records.
 - The ownership and security of a detail record is determined by the master record.
 - When viewing the master record, all detail records are listed.
 - You can create roll-up summary fields on the master record to summarize the detail records.
- Master-Detail Relationship: Creates a relationship that links this object to another object. The master object is the source of the values in the list.
- External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a pop-up calendar.
- DateTime: Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If the field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter any combination of letters and numbers.
- Text Area: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.
- Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- URL: Allows users to enter any combination of letters and numbers and store them in encrypted form.

In Step 1, select the **Picklist** data type, then click the Next button.



In Step 2, configure the following as follows:

- **Field Label:** Loyalty Status
- **Field Name:** Loyalty_Status
- **Values:** Enter values, with each value separated by a new line:
 - Gold
 - Silver
 - Bronze

Then, proceed to the last step and click the **Save** button.

4. Create Lookup Relationship

- **Creating Lookup Relationship between Marketing Campaign and HandsSome Customer:**

The screenshot shows the Salesforce Object Manager interface. At the top, there are several tabs: 'phillippines.myskillwallet.ai/dash', 'Tabs | Salesforce', 'HandsMen Threads - Lightning', 'Object Manager | Salesforce', 'Marketing Campaign | Salesforce', and 'Inbox - miguelorias02@gmail.com'. Below the tabs, the URL is 'orgfarm-9fd19b166c-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/home'. The main area is titled 'Object Manager' with a sub-section 'Marketing campaign'. A search bar at the top says 'Search Setup'. The table below lists one item: 'Marketing_Campaign' with 'Marketing_Campaign_c' as the API name, 'Custom Object' as the type, and '10/12/2025' as the last modified date. There is a 'Create' button at the top right.

In Object Manager, search for Marketing Campaign, then select it to open the object settings.

The screenshot shows the Marketing Campaign object settings in the Salesforce Setup interface. The URL is 'orgfarm-9fd19b166c-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lg.000002pCZ3/FieldsAndRelationships/view'. The main title is 'Marketing Campaign'. On the left, there are tabs: 'Details', 'Fields & Relationships' (which is selected), and 'Page Layouts'. The 'Fields & Relationships' section has a sub-section 'Fields & Relationships' with 7 items, sorted by Field Label. It includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. One row is visible: 'Created By' (FIELD LABEL), 'CreatedById' (FIELD NAME), 'Lookup(User)' (DATA TYPE), and empty for CONTROLLING FIELD and INDEXED.

In the Marketing Campaign object settings, click Fields & Relationships, then click the New button to create a new custom field.

The screenshot shows the Salesforce setup interface for creating a new object named 'Marketing Campaign'. The 'Fields & Relationships' tab is active. In the 'Data Type' section, 'Lookup Relationship' is selected. This choice is indicated by a blue border around the radio button and the descriptive text below it. Other options like 'None Selected', 'Auto Number', 'Formula', and 'Roll-Up Summary' are also listed but not selected.

In Step 1, select the **Lookup Relationship** data type, then click the **Next** button.

The screenshot shows the 'New Relationship' setup step 2. The 'Related To' dropdown menu is open, and 'HandsMen Customer' is selected. The 'Step 2' header indicates this is the second step in the process. Navigation buttons for 'Previous', 'Next', and 'Cancel' are visible at the bottom right.

In Step 2, set **Related To** as **HandsMen Customer**.

Custom Field Definition Edit

Field Information

Field Label: HandsMen Customer
Field Name: HandsMen_Customer

Data Type: Lookup

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization: Available, PII, HIPAA, GDPR, PCI

Chosen

Lookup Options

In Step 3, configure the relationship field as follows:

- **Field Label:** HandsMen Customer
- **Field Name:** HandsMen_Customer
- **Child Relationship Name:** Marketing_Campaigns

Then, click the **Next** button through each step until the final screen, and click the **Save** button.

- **Creating Lookup Relationship between HandsMen Product and HandsMen Order:**

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Product	HandsMen_Product__c	Custom Object		10/12/2025	✓

In Object Manager, search for **HandsMen Product**, then select it to open the object settings.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup'. Below the navigation is a header for 'SETUP > OBJECT MANAGER' and 'HandsMen Product'. On the left, a sidebar has 'Details' and 'Fields & Relationships' selected. The main area is titled 'Fields & Relationships' with '8 Items, Sorted by Field Label'. It has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. A toolbar at the top of this section includes 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

In the **HandsMen Product** object settings, click **Fields & Relationships**, then click the **New** button to create a new custom field.

This screenshot shows the 'New Custom Field' wizard for the 'HandsMen Product' object. The title bar says 'HandsMen Product' and 'New Custom Field'. Step 1, 'Choose the field type', is displayed. Under 'Data Type', the 'None Selected' option is selected. Other options shown are 'Auto Number', 'Formula', 'Roll-Up Summary', and 'Lookup Relationship'. A detailed description for each option is provided. The bottom right of the screen shows 'Step 1' and 'Next' and 'Cancel' buttons.

In Step 1, select the **Lookup Relationship** data type, then click the **Next** button.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, there are tabs for 'Object Manager | Salesforce' and 'HandsMen Product | Salesforce'. Below the tabs, the URL is orgfarm-9fd19b166c-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lg00000zCPN/FieldsAndRelationships/new. The main content area is titled 'HandsMen Product' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The 'Fields & Relationships' tab is currently active. A modal window titled 'New Relationship' is open, specifically 'Step 2. Choose the related object'. It shows a dropdown menu where 'HandsMen Order' is selected as the related to object. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible at the bottom of the modal.

In Step 2, set Related To as HandsMen Order.

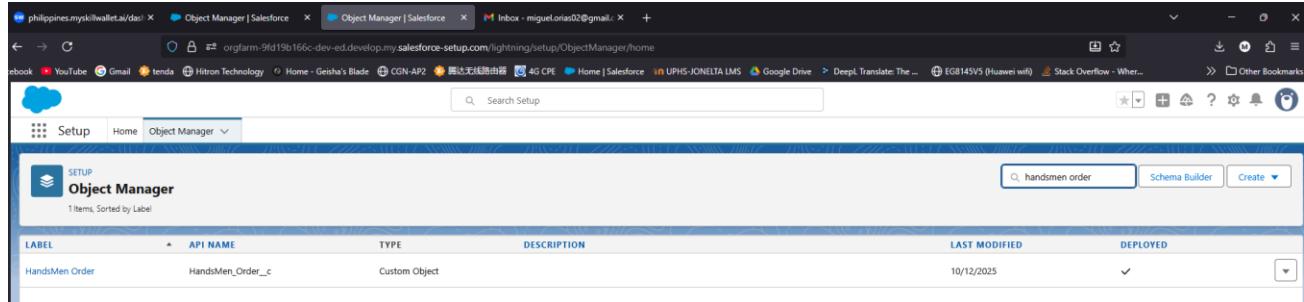
The screenshot shows the 'HandsMen Product' object configuration screen. The 'Fields & Relationships' tab is selected. A 'New Relationship' dialog is open, Step 2: Choose the related object, with 'HandsMen Order' selected as the related to object. The 'Related To' field is set to 'HandsMen Order'. The 'Child Relationship Name' field is empty. Under 'Required', the 'Clear the value of this field. You can't choose this option if you make this field required.' radio button is selected. Other options include 'Always require a value in this field in order to save a record' and 'Don't allow deletion of the lookup record that's part of a lookup relationship.'

In Step 3, configure the relationship field as follows:

- **Field Label:** Order
- **Field Name:** HandsMen_Order
- **Child Relationship Name:** HandsMen_Products

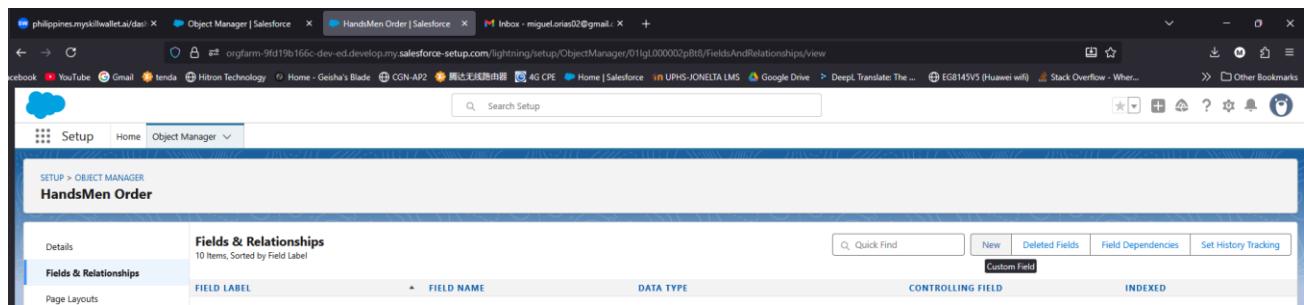
Then, click the **Next** button through each step until the final screen, and click the **Save** button.

- **Creating Lookup Relationship between HandsMen Order and HandsMen Customer:**



The screenshot shows the Salesforce Object Manager interface. In the search bar at the top right, 'handsmen order' is typed. Below the search bar, there are buttons for 'Schema Builder' and 'Create'. A table lists one item: 'HandsMen Order' with API name 'HandsMen_Order__c', Type 'Custom Object', Last Modified '10/12/2025', and Deployed status checked. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

In Object Manager, search for **HandsMen Order**, then select it to open the object settings.



The screenshot shows the 'HandsMen Order' object settings in the Salesforce Object Manager. The page title is 'SETUP > OBJECT MANAGER HandsMen Order'. On the left, there are tabs for 'Details', 'Fields & Relationships' (which is selected), and 'Page Layouts'. The main content area is titled 'Fields & Relationships' and shows 10 items, sorted by Field Label. It includes a table with columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. At the bottom of the table, there are buttons for 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. A 'Custom Field' button is also present.

In the **HandsMen Order** object settings, click **Fields & Relationships**, then click the **New** button to create a new custom field.

SETUP > OBJECT MANAGER
HandsMen Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary ⓘ A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox Allows users to select a True (checked) or False (unchecked) value.

Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date Allows users to enter a date or pick a date from a popup calendar.

Date/Time Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

In Step 1, select the **Lookup Relationship** data type, then click the Next button.

In Step 2, set **Related To** as **HandsMen Customer**.

SETUP > OBJECT MANAGER
HandsMen Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

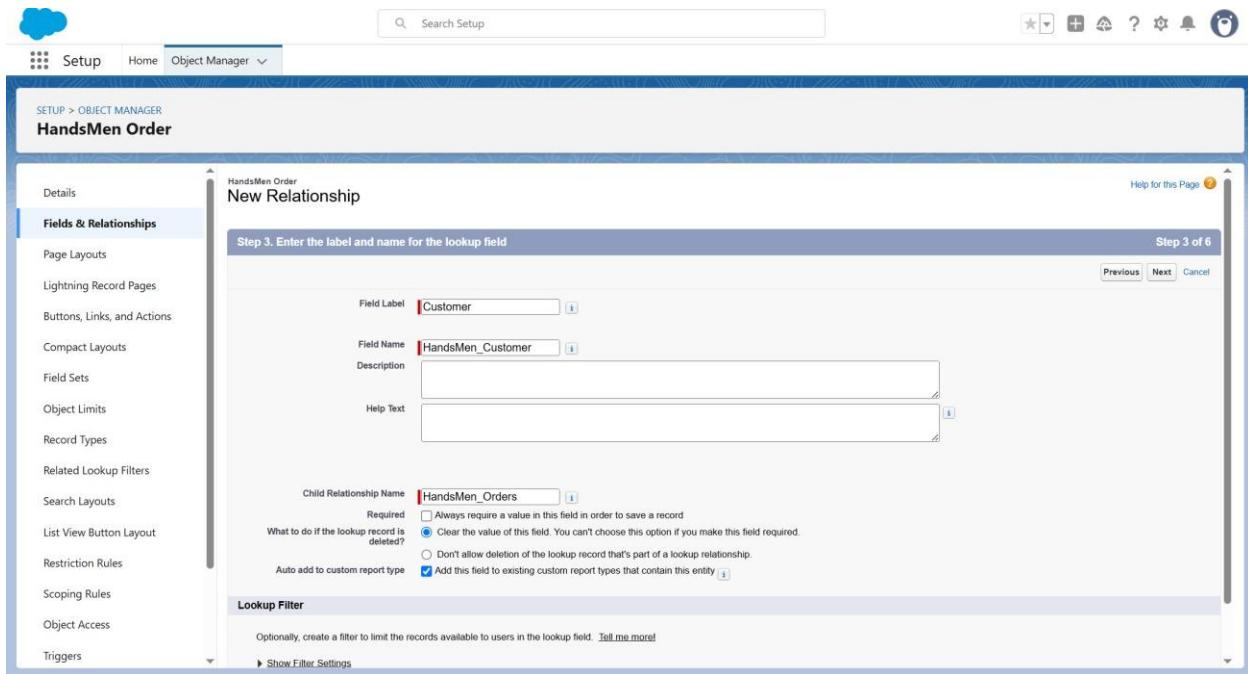
Triggers

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To



In Step 3, configure the relationship field as follows:

- **Field Label:** Customer
- **Field Name:** HandsMen_Customer
- **Child Relationship Name:** HandsMen_Orders

Then, click the **Next** button through each step until the final screen, and click the **Save & New** button.

SETUP > OBJECT MANAGER
HandsMen Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Data Type

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

checkbox

Currency

Date

Date/Time

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Next Cancel

In Step 1, select the **Lookup Relationship** data type, then click the Next button.

In Step 2, set Related To as HandsMen Product.

SETUP > OBJECT MANAGER
HandsMen Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

New Relationship

Step 2. Choose the related object

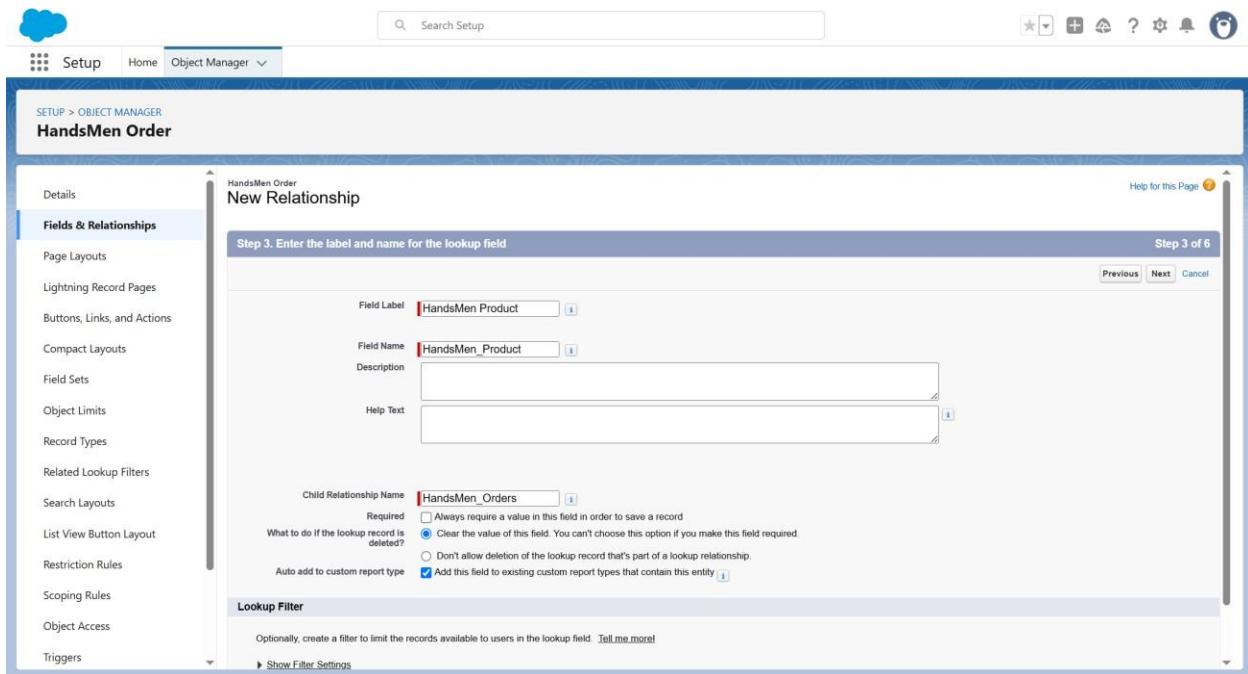
Help for this Page

Step 2

Previous Next Cancel

Related To

Previous Next Cancel



In Step 3, configure the relationship field as follows:

- **Field Label:** HandsMen Product
- **Field Name:** HandsMen_Product
- **Child Relationship Name:** HandsMen_Orders

Then, click the **Next** button through each step until the final screen, and click the **Save** button.

- **Creating Master-Detail Relationship between Inventory and HandsSome Product:**

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Inventory	Inventory__c	Custom Object		10/12/2025	✓

In Object Manager, search for **Inventory**, then select it to open the object settings.

A screenshot of the Salesforce Object Manager interface. The top navigation bar shows 'Setup' and 'Object Manager'. The main title is 'Inventory'. On the left, a sidebar lists options like Details, Fields & Relationships (which is selected and highlighted in blue), Page Layouts, etc. The central area is titled 'Fields & Relationships' with a sub-header '4 Items, Sorted by Field Label'. A table displays the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		

In the **Inventory** object settings, click **Fields & Relationships**, then click the **New** button to create a new custom field.

In Step 1, select the **Master-Detail Relationship** data type, then click the **Next** button.

A screenshot of the Salesforce Object Manager interface, specifically the 'Data Type' step of creating a new custom field. The top navigation bar shows 'Setup' and 'Object Manager'. The main title is 'Inventory'. On the left, a sidebar lists various object settings like Details, Fields & Relationships (selected), Page Layouts, etc. The central area is titled 'Data Type' and shows a list of options:

- None Selected: Select one of the data types below.
- Auto Number: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship: Creates a specific type of master-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- Date/Time: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A sidebar on the left lists various setup options under 'Fields & Relationships'. The main area displays the 'New Relationship' wizard, Step 2 of 6. The title is 'Inventory New Relationship'. The sub-step is 'Step 2. Choose the related object'. It asks to 'Select the other object to which this object is related' and shows a dropdown menu with 'HandsMen Product' selected. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom.

In Step 2, set Related To as HandsMen Product.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A sidebar on the left lists various setup options under 'Fields & Relationships'. The main area displays the 'New Relationship' wizard, Step 3 of 6. The title is 'Inventory New Relationship'. The sub-step is 'Step 3. Enter the label and name for the lookup field'. It shows fields for 'Field Label' (Product), 'Field Name' (HandsMen_Product), 'Description' (empty), and 'Help Text' (empty). Below these are sections for 'Child Relationship Name' (Inventory), 'Sharing Setting' (Read Only selected), 'Allow reparenting' (checkboxes for 'Child records can be reparented to other parent records after they are created' and 'Add this field to existing custom report types that contain this entity' checked), and a 'Lookup Filter' section (with a note about creating a filter to limit records). Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom.

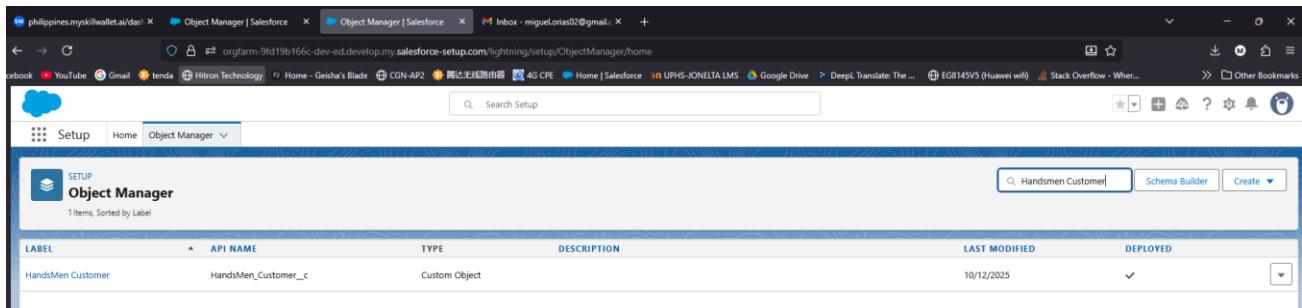
In Step 3, configure the relationship field as follows:

- **Field Label:** Product
- **Field Name:** HandsMen_Product
- **Child Relationship Name:** Inventorys

Then, click the **Next** button through each step until the final screen, and click the **Save** button.

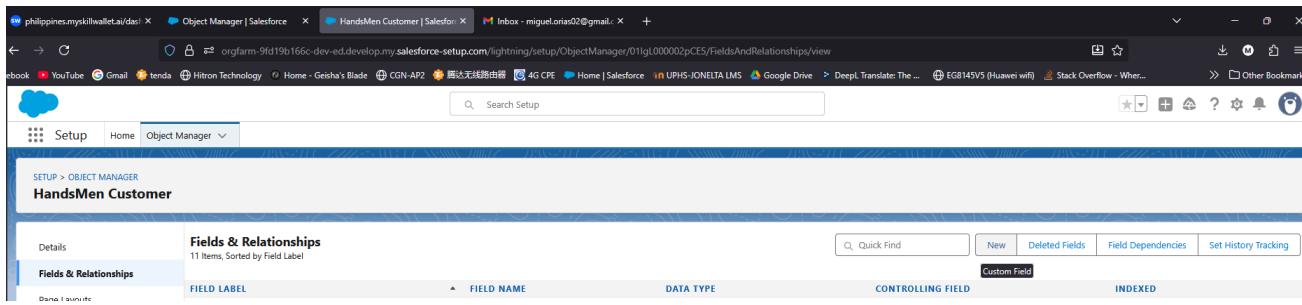
5. Formula Fields

- **Full Name:**



The screenshot shows the Salesforce Object Manager interface. In the search bar at the top right, 'HandsMen Customer' is typed. Below the search bar, there's a 'Schema Builder' and a 'Create' button. The main table lists one item: 'HandsMen Customer' with API name 'HandsMen_Customer__c', Type 'Custom Object', Last Modified on 10/12/2025, and Deployed status checked. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

In Object Manager, search for **HandsMen Customer**, then select it to open the object settings.



The screenshot shows the 'HandsMen Customer' object settings in the Salesforce Object Manager. The 'Fields & Relationships' tab is selected. At the top right, there are buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below the buttons, there's a 'Custom Field' link. The main table lists fields under the 'Fields & Relationships' section, with 11 items sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

In the **HandsMen Customer** object settings, click **Fields & Relationships**, then click the **New** button to create a new custom field.

The screenshot shows the Salesforce Setup interface for the 'HandsMen Customer' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' section is active. On the right, a list of field types is shown with their descriptions. The 'Text' field type is selected, indicated by a blue circle. Other field types listed include Checkbox, Currency, Date, Date/Time, Email, Geolocation, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL.

In Step 1, select the Text data type, then click the Next button.

The screenshot shows the 'Step 2. Enter the details' page for creating a new custom field named 'FirstName'. The 'Field Label' is set to 'FirstName'. The 'Length' is set to 60. The 'Field Name' is also set to 'FirstName'. There is no description or help text provided. Under the 'Required' section, there is a checkbox for 'Always require a value in this field in order to save a record'. Under 'Unique', there are two options: 'Do not allow duplicate values' (selected) and 'Treat "ABC" and "abc" as duplicate values (case insensitive)'. Under 'External ID', there is a checkbox for 'Set this field as the unique record identifier from an external system'. Under 'Auto add to custom report type', there is a checkbox for 'Add this field to existing custom report types that contain this entity' (selected). The 'Default Value' is set to 'Show Formula Editor'.

In Step 2, configure the field as follows:

- **Field Label:** FirstName
- **Field Name:** FirstName
- **Length:** 60

Then, click **Next** through each step until the final screen, and click the **Save** button.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Fields & Relationships' and lists various options like Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions. The main area is titled 'HandsMen Customer New Custom Field' and is on 'Step 2 of 4'. The configuration details are as follows:

- Field Label:** LastName
- Length:** 60
- Field Name:** LastName
- Description:** (empty)
- Help Text:** (empty)
- Required:** Always require a value in this field in order to save a record
- Unique:** Do not allow duplicate values
 - Treat "ABC" and "abc" as duplicate values (case insensitive)
 - Treat "ABC" and "abc" as different values (case sensitive)
- External ID:** Set this field as the unique record identifier from an external system
- Auto add to custom report type:** Add this field to existing custom report types that contain this entity
- Default Value:** Show Formula Editor

Create a new field with the same data type used for FirstName (**Text**). In **Step 2**, configure the field as follows:

- **Field Label:** LastName
- **Field Name:** LastName
- **Length:** 60

Then, click **Next** through each step until the final screen, and click the **Save** button.

SETUP > OBJECT MANAGER
HandsMen Customer

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox Allows users to select a True (checked) or False (unchecked) value.

Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date Allows users to enter a date or pick a date from a popup calendar.

Date/Time Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Create a new field, and in **Step 1**, select the **Formula** data type.

SETUP > OBJECT MANAGER
HandsMen Customer

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Field Label

Field Name

Add this field to existing custom report types that contain this entity

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.
Example: `TODAY() > CloseDate`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost__c`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius__c + 32`

Percent Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount__c) / Amount`

Text Create a text string, for example, by concatenating other text fields.
Example: `Full Name = LastName & ", " & FirstName`

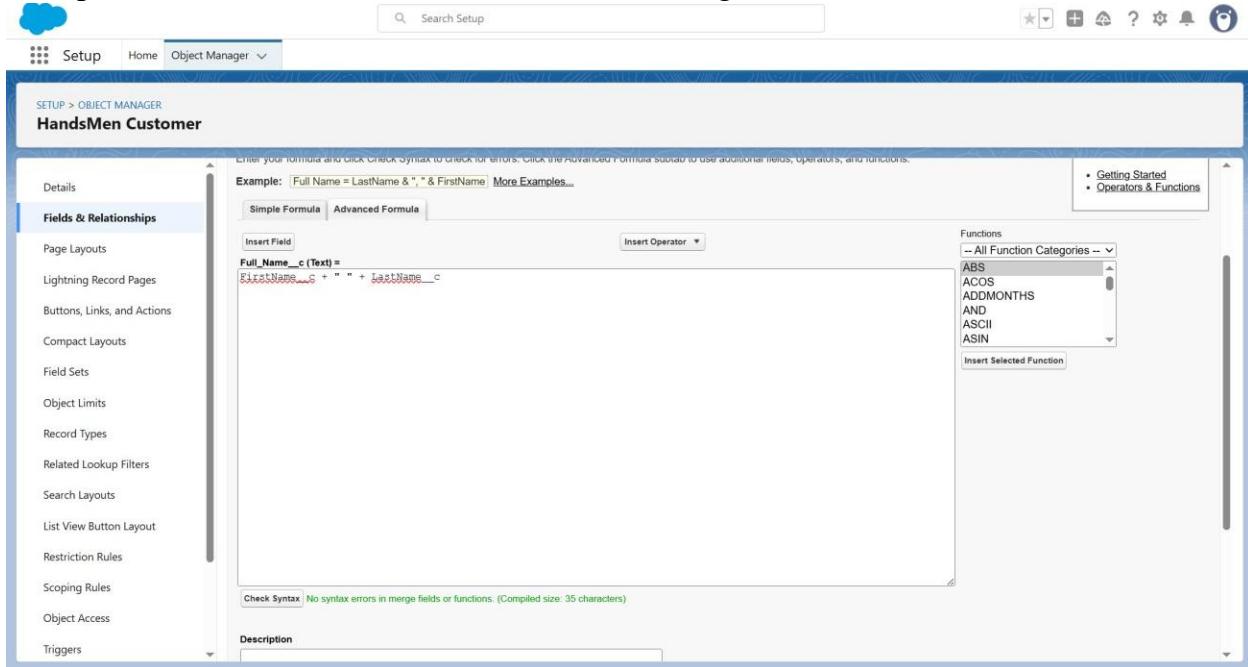
Time Calculate a time, for example, by adding a number of hours to another time.
Example: `Next = TIMEVALUE(NOW()) + 1`

In **Step 2**, configure the formula field as follows:

- **Field Label:** Full Name
- **Field Name:** Full_Name
- In the **Formula Return Type** section, select **Text**.

Then, click the **Next** button to proceed.

In Step 3, select **Advanced Formula** and enter the following formula:



- **FirstName_c + " " + LastName_c**

Then, click **Next** through each step until the final screen, and click the **Save** button.

- **Stock Quantity:**

The screenshot shows the Salesforce Object Manager interface. At the top, there are browser tabs for 'philippines.myskillwallet.a/dsel', 'Object Manager | Salesforce', and 'Inbox - miguel.orias02@gmail.com'. Below the tabs, the URL is 'orgfarm-9fd19b166c-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/home'. The page title is 'Object Manager'. The main content area shows a table with one row for the 'Inventory' object. The table columns are 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The 'LABEL' column shows 'Inventory', 'API NAME' shows 'Inventory__c', 'TYPE' shows 'Custom Object', 'DESCRIPTION' is blank, 'LAST MODIFIED' shows '10/12/2025', and 'DEPLOYED' has a checkmark. A search bar at the top right contains 'inventory'.

In **Object Manager**, search for **Inventory**, then select it to open the object settings.

In the **Inventory** object settings, click **Fields & Relationships**, then click the **New** button to create a new custom field.

The screenshot shows the 'Fields & Relationships' section of the 'Inventory' object settings. The left sidebar has options for 'Details', 'Fields & Relationships' (which is selected), and 'Page Layouts'. The main content area has a table titled 'Fields & Relationships' with one row. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The 'FIELD LABEL' column shows 'Created By', 'FIELD NAME' shows 'CreatedBy', 'DATA TYPE' shows 'Lookup(User)', and both 'CONTROLLING FIELD' and 'INDEXED' are blank.

The screenshot shows the Salesforce Setup interface for the 'Inventory' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' section is currently selected. On the right, a detailed list of field types is shown with their descriptions:

- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number**
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted)
- Time
- URL

Each field type has a brief description of its functionality.

In Step 1, select the **Number** data type, then click the **Next** button.

The screenshot shows the 'New Custom Field' configuration screen for the 'Stock Quantity' field. The 'Field Label' is set to 'Stock Quantity'. The 'Length' is set to 18 and 'Decimal Places' is set to 0. The 'Field Name' is 'Stock_Quantity'. The 'Description' and 'Help Text' fields are empty. Under the 'Required' section, the 'Always require a value in this field in order to save a record' checkbox is unchecked. Other options like 'Unique', 'External ID', 'AI Prediction', and 'Auto add to custom report type' are also present. The 'Default Value' field is empty. The top right corner shows 'Step 2 of 4' and navigation buttons for Previous, Next, and Cancel.

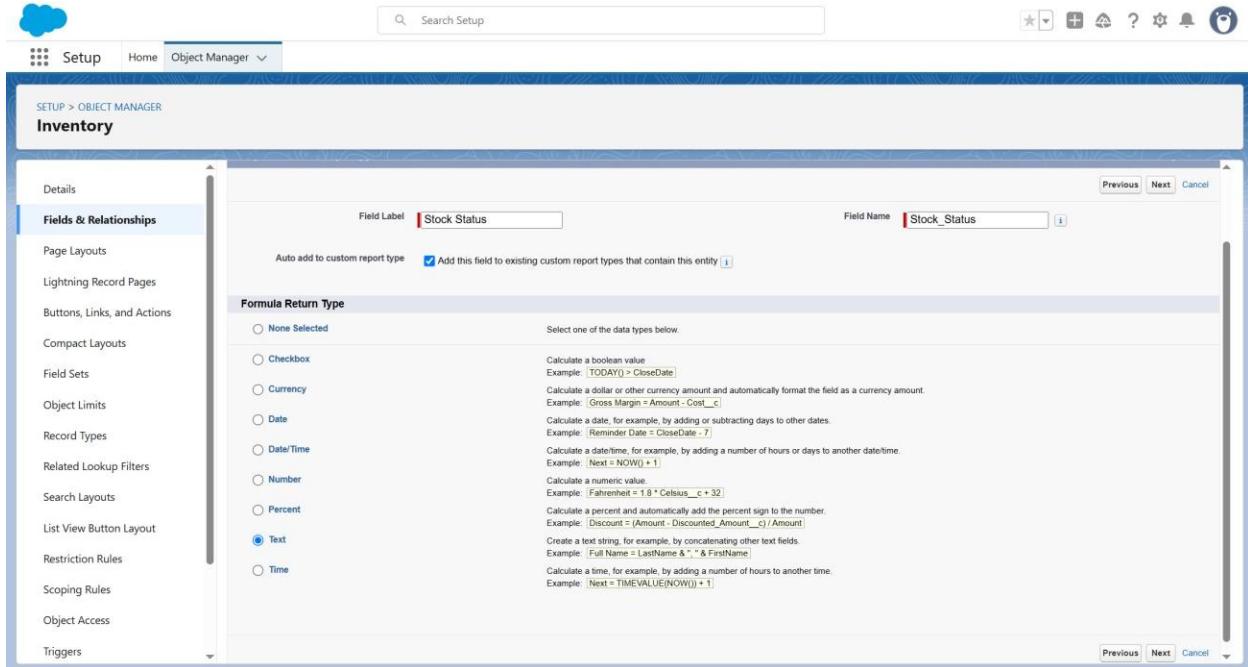
In Step 2, configure the field as follows:

- **Field Label:** Stock Quantity
- **Field Name:** Stock_Quantity
- **Length:** 18

Then, click **Next** through each step until the final screen, and click the **Save** button.

- **Stock Status:**

Create a new field, and in **Step 1**, select the **Formula** data type. In **Step 2**,



configure the field as follows:

- **Field Label:** Stock Status
- **Field Name:** Stock_Status
- In the **Formula Return Type** section, select **Text**

Then, click the **Next** button to proceed.

Formula Return Type **Text**

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Full Name = LastName & " " & FirstName` [More Examples...](#)

Simple Formula **Advanced Formula**

Insert Field **Insert Operator ▾**

Stock Status (Text) =
`IF(Stock_Quantity__c > 10, "Available", "Low Stock")`

In Step 3, select **Advanced Formula** and enter the following formula:

- **IF(Stock_Quantity__c>10, "Available", "Low Stock")**

Then, click **Next** through each step until the final screen, and click the **Save** button.

6. Create remaining fields for the objects

- **HandsMen Customer:**

Total Purchases Total_Purchases_c Number(18, 0) ▾

SETUP > OBJECT MANAGER
HandsMen Customer

Total Purchases

Custom Field Definition Edit Change Field Type Save Cancel

Field Information

Field Label: Total Purchases
Field Name: Total_Purchases
Description:
Help Text:
Data Owner: User
Field Usage: None
Data Sensitivity Level: None
Compliance Categorization: Available (PII, HIPAA, GDPR, PCI) Chosen

General Options

Required: Always require a value in this field in order to save a record
Unique: Do not allow duplicate values
External ID: Set this field as the unique record identifier from an external system
AI Prediction: Use this field to store AI prediction scores
Default Value: Show Formula Editor
Use Formula syntax: Enclose text and picklist value API names in double quotes : ("The_Value"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadata.Type__md.RecordName.FieldName__c}

Number Options

Length: 18
Decimal Places: 0

Create a new field in the **HandsMen Customer** object.

- **Step 1:** Select the **Number** data type.
- **Step 2:** Configure the field as follows:
 - **Field Label:** Total Purchases
 - **Field Name:** Total_Purchases
 - **Length:** 18

Then, proceed through the remaining steps and click the **Save** button on the final screen.

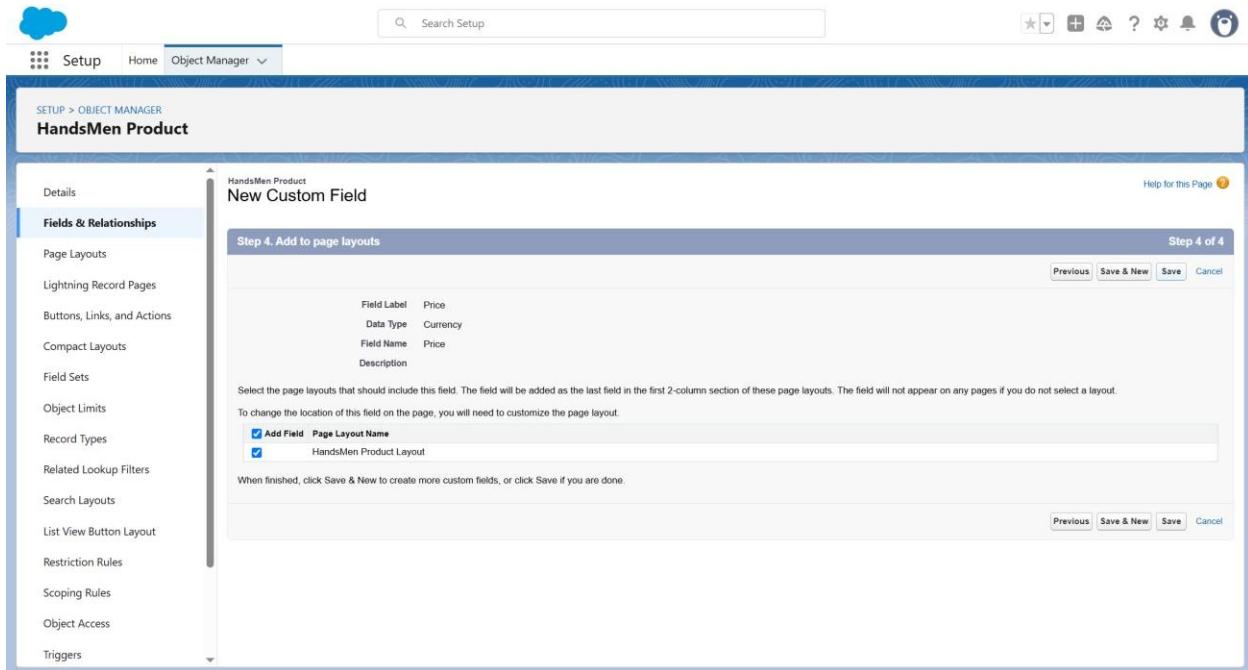
- **HandsMen Product:**

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, 'Setup' (selected), 'Home', and 'Object Manager'. A search bar says 'Search Setup' and a toolbar has icons for star, plus, document, question, star, bell, and user. The main area shows 'SETUP > OBJECT MANAGER' and 'HandsMen Product'. On the left, a sidebar lists 'Fields & Relationships' under 'New Custom Field'. The main content area is titled 'HandsMen Product New Custom Field Step 4. Add to page layouts'. It shows a table with one row: 'Field Label' is 'SKU', 'Data Type' is 'Text', 'Field Name' is 'SKU', and 'Description' is empty. Below the table, it says 'Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.' There are two checkboxes: 'Add Field' (checked) and 'Page Layout Name' (checked). The value 'HandsMen Product Layout' is shown. At the bottom, it says 'When finished, click Save & New to create more custom fields, or click Save if you are done.' Buttons at the bottom right include 'Previous', 'Save & New' (highlighted), 'Save', and 'Cancel'.

Create a new field in the **HandsMen Product** object.

- **Step 1:** Select the **Text** data type.
- **Step 2:** Configure the field as follows:
 - **Field Label:** SKU
 - **Field Name:** SKU
 - **Length:** 60

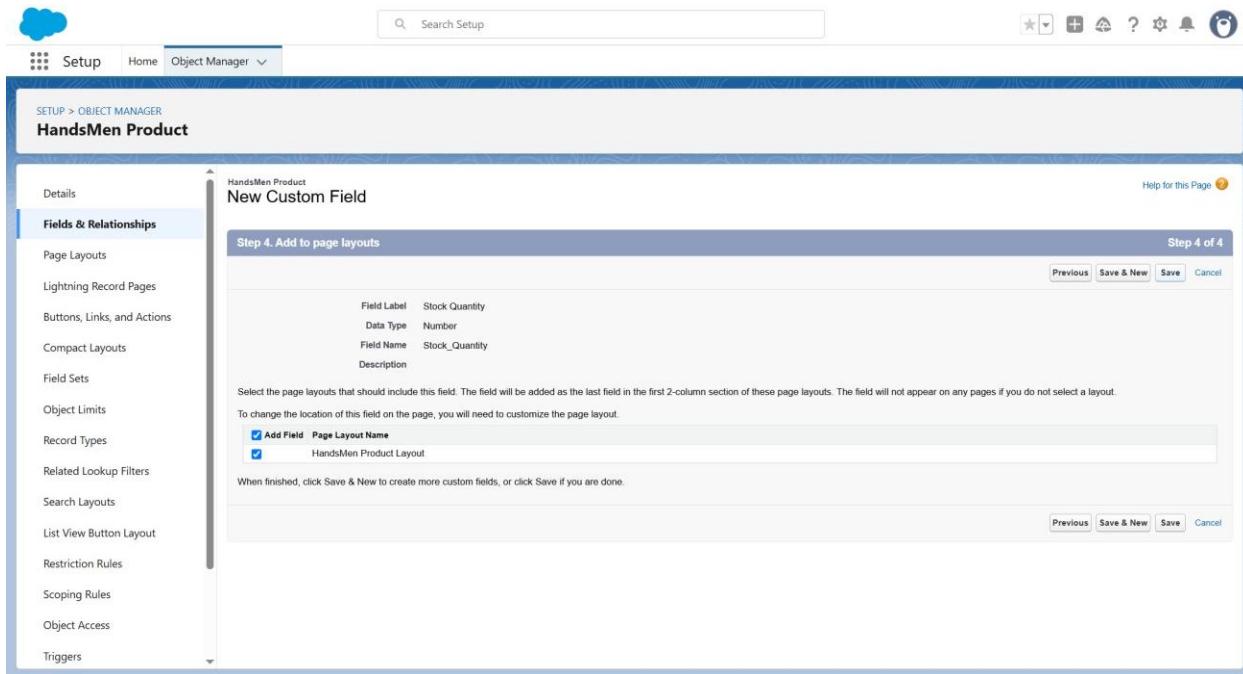
Then, proceed through the remaining steps and click the **Save** button on the final screen.



Create a new field in the **HandsMen Product** object.

- **Step 1:** Select the **Currency** data type.
- **Step 2:** Configure the field as follows:
 - **Field Label:** Price
 - **Field Name:** Price
 - **Length:** 18

Then, proceed through the remaining steps and click the **Save** button on the final screen.

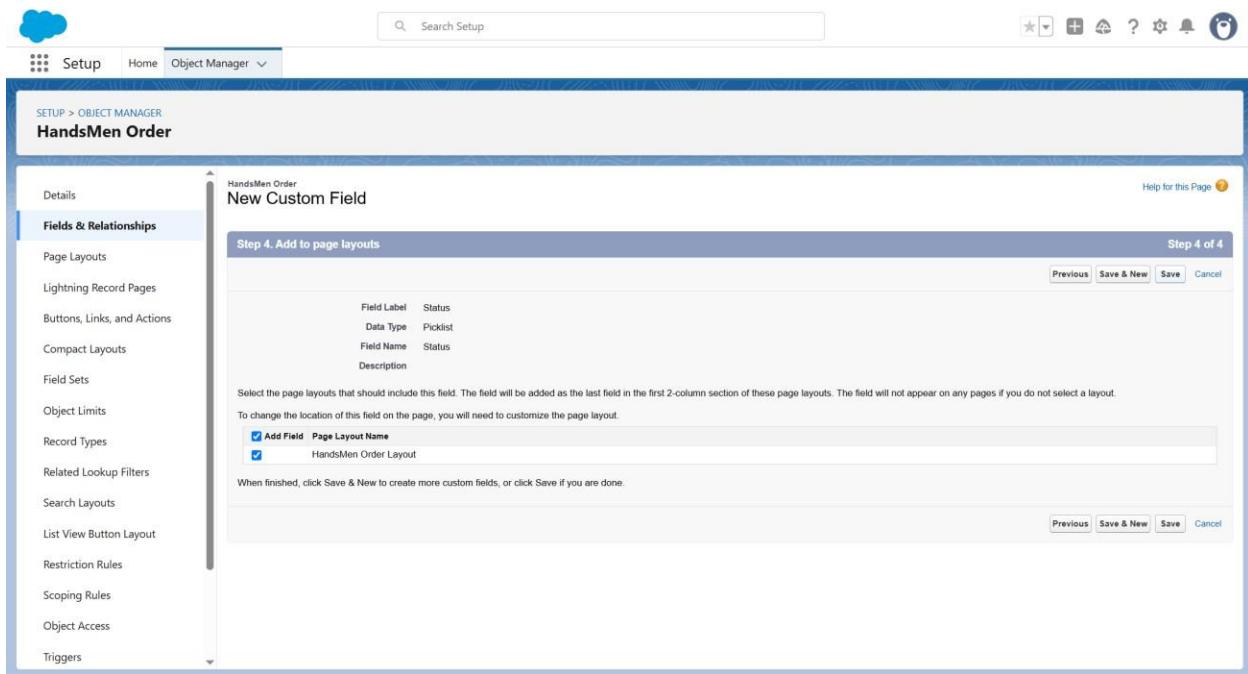


Create a new field in the **HandsMen Product** object.

- **Step 1:** Select the **Number** data type.
- **Step 2:** Configure the field as follows:
 - **Field Label:** Stock Quantity
 - **Field Name:** Stock_Quantity
 - **Length:** 18

Then, proceed through the remaining steps and click the **Save** button on the final screen.

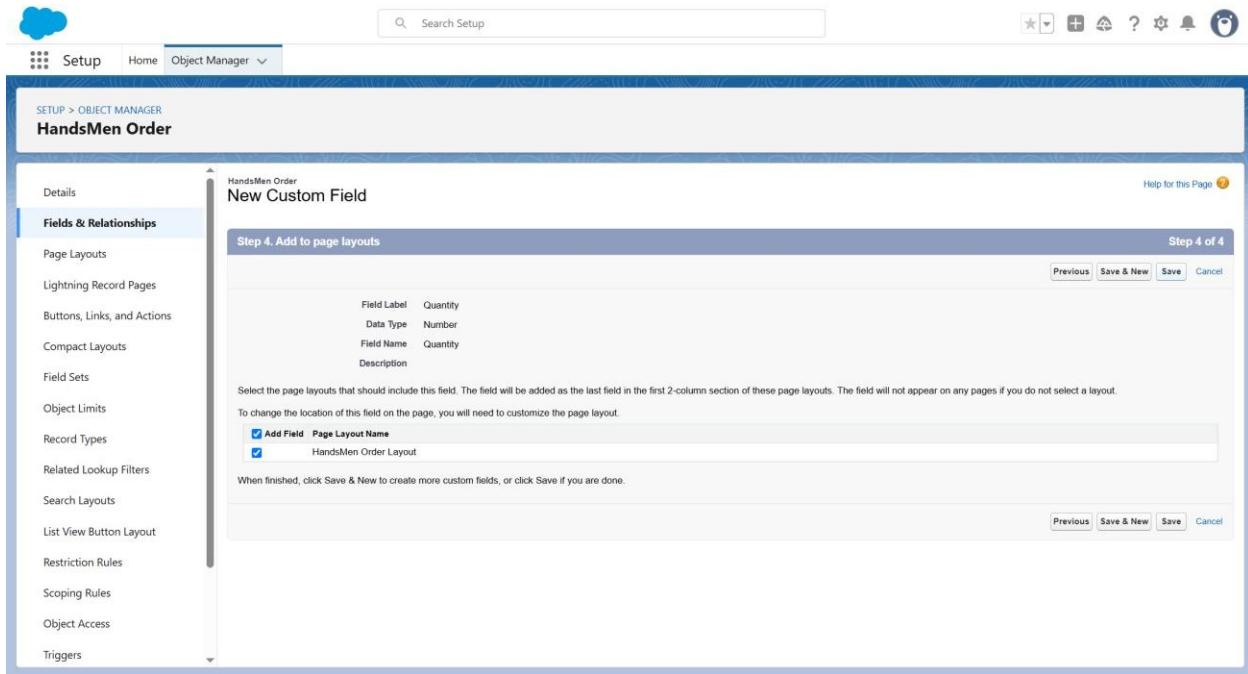
- **HandsMen Order:**



Create a new field in the **HandsMen Order** object.

- **Step 1:** Select the **Picklist** data type.
- **Step 2:** Configure the field as follows:
 - **Field Label:** Status
 - **Field Name:** Status
 - **Values:** Enter values manually, each separated by a new line:
 - Pending
 - Confirmed
 - Rejection

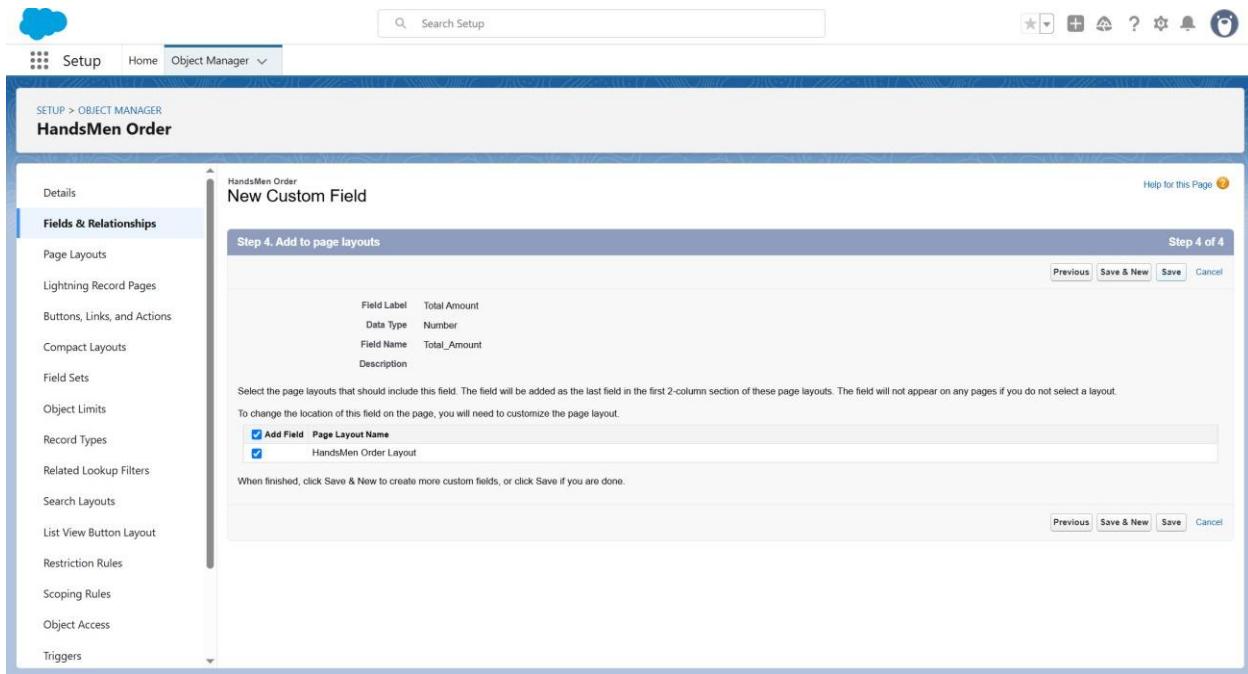
Then, proceed through the remaining steps and click the **Save** button on the final screen.



Create a new field in the **HandsMen Order** object.

- **Step 1:** Select the **Number** data type.
- **Step 2:** Configure the field as follows:
 - **Field Label:** Quantity
 - **Field Name:** Quantity
 - **Length:** 18

Then, proceed through the remaining steps and click the **Save** button on the final screen.

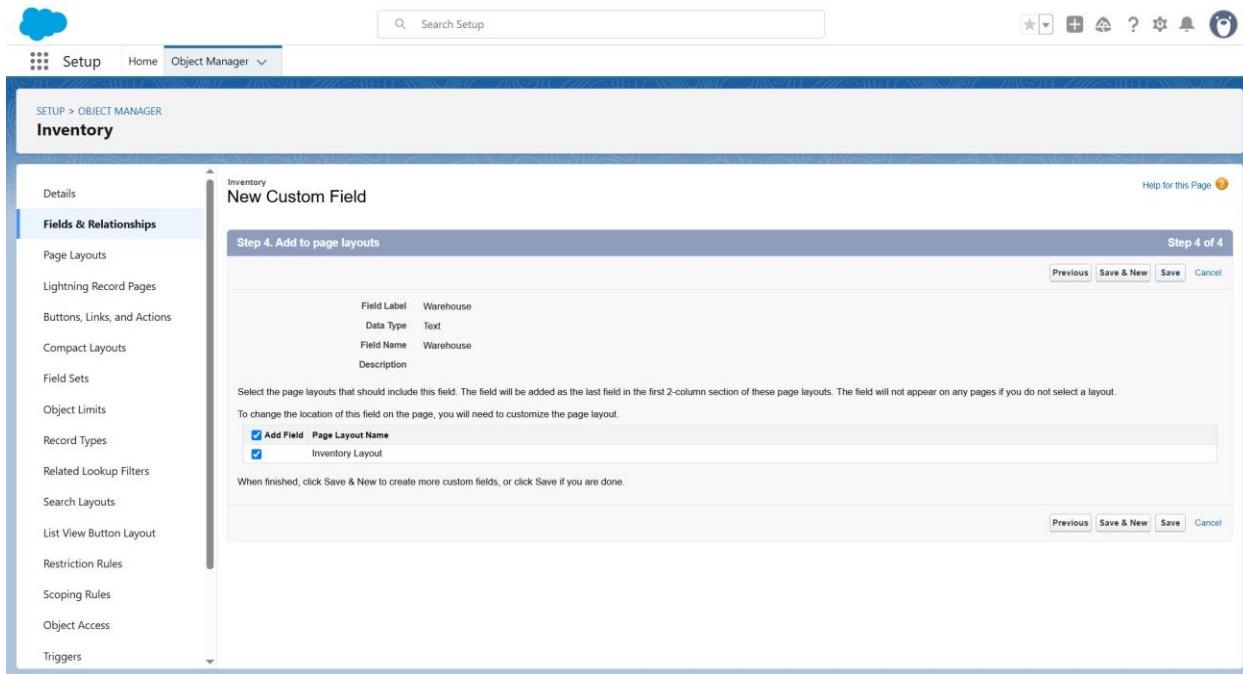


Create a new field in the **HandsMen Order** object.

- **Step 1:** Select the **Number** data type.
- **Step 2:** Configure the field as follows:
 - **Field Label:** Total Amount
 - **Field Name:** Total_Amount
 - **Length:** 18

Then, proceed through the remaining steps and click the **Save** button on the final screen.

- **Inventory:**

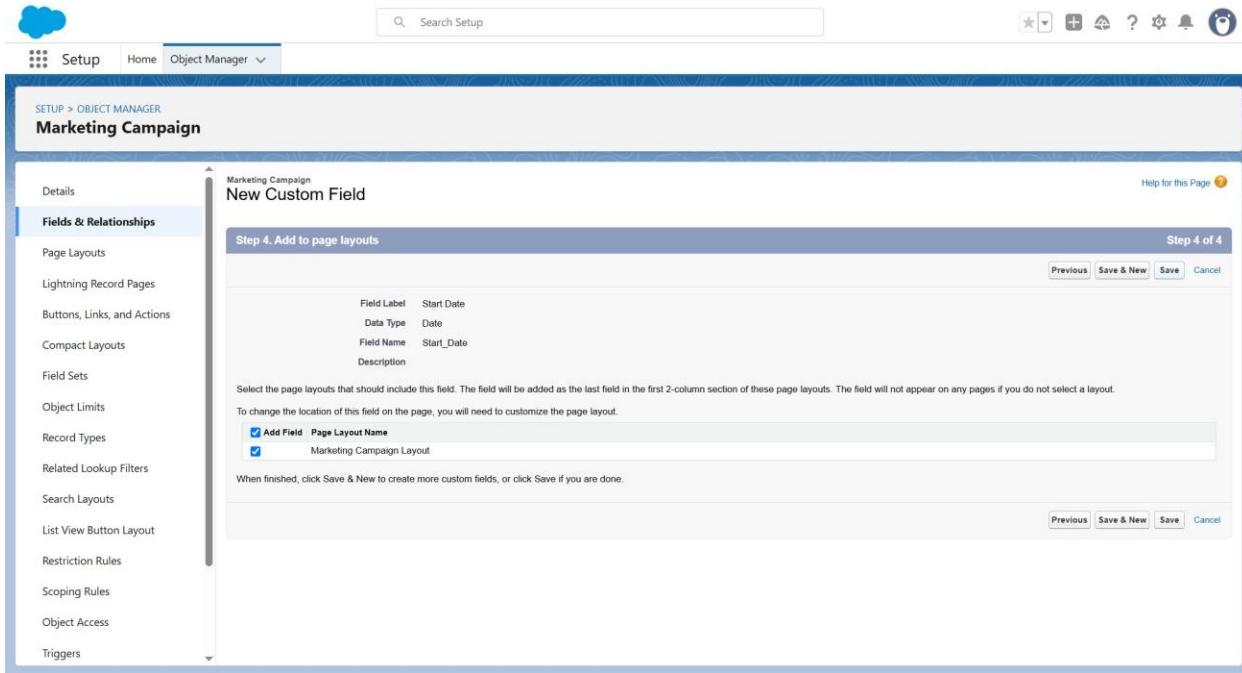


Create a new field in the **Inventory** object.

- **Step 1:** Select the **Text** data type.
- **Step 2:** Configure the field as follows:
 - **Field Label:** Warehouse
 - **Field Name:** Warehouse
 - **Length:** 60

Then, proceed through the remaining steps and click the **Save** button on the final screen.

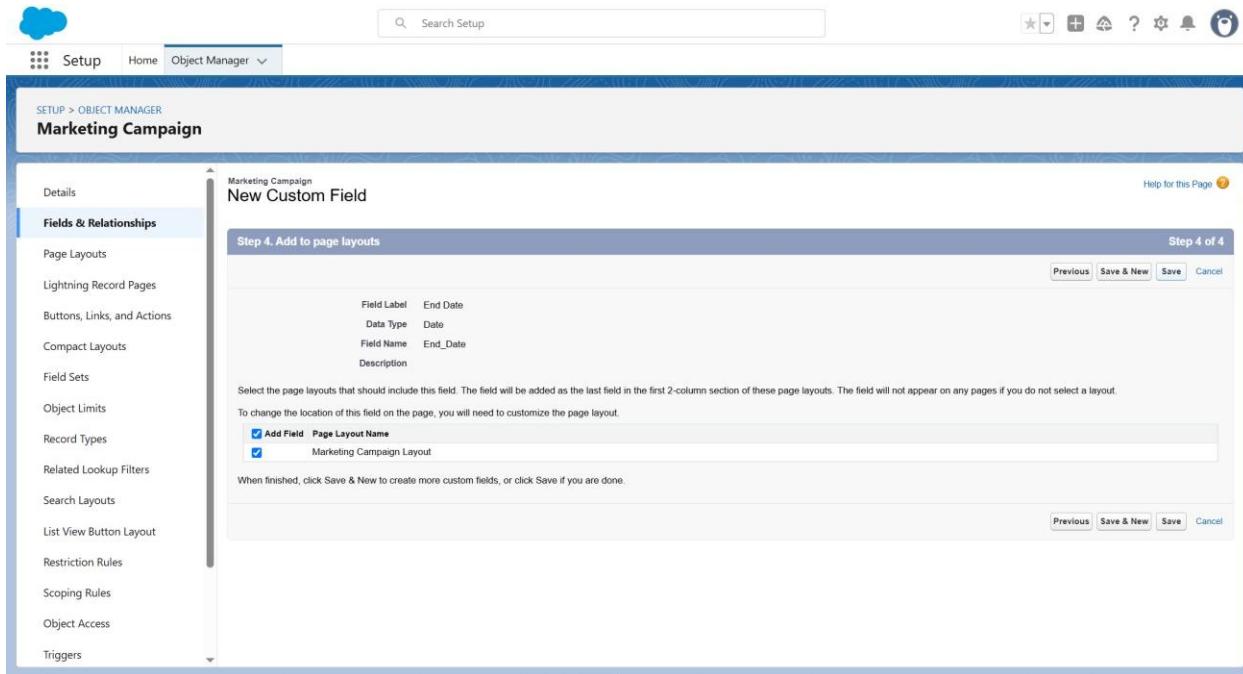
- **Marketing Campaign:**



Create a new field in the **Market Campaign** object.

- **Step 1:** Select the **Date** data type.
- **Step 2:** Configure the field as follows:
 - **Field Label:** Start Date
 - **Field Name:** Start_Date

Then, proceed through the remaining steps and click the **Save** button on the final screen.



Create a new field in the **Market Campaign** object.

- **Step 1:** Select the **Date** data type.
- **Step 2:** Configure the field as follows:
 - **Field Label:** End Date
 - **Field Name:** End_Date

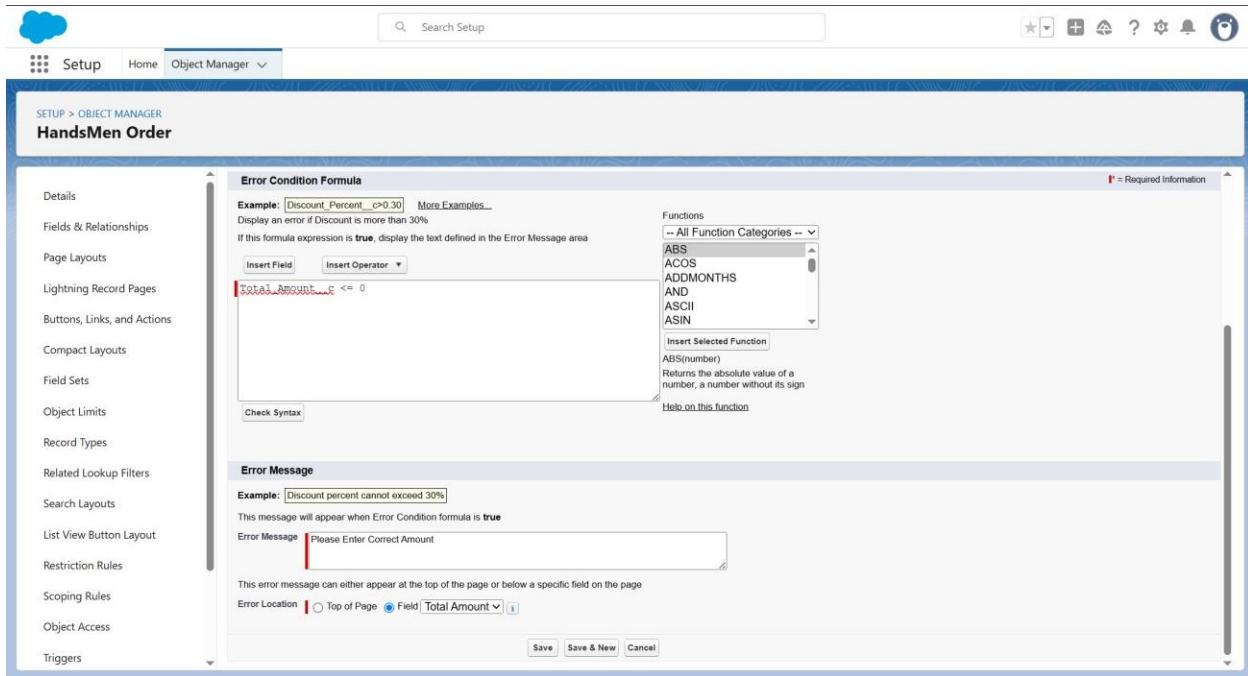
Then, proceed through the remaining steps and click the **Save** button on the final screen.

Data Configuration

Validation Rules:

- HandsMen Order:

The screenshot shows the Salesforce Setup interface for creating a Validation Rule. The left sidebar lists various configuration options like Details, Fields & Relationships, and Page Layouts. The main area is titled "HandsMen Order Validation Rule". It includes fields for "Rule Name" (set to "Total_Amount"), "Active" status (checked), and a "Description" field. Below these is the "Error Condition Formula" section, which contains the formula "Total_Amount <= 0". A tooltip for "Total_Amount" indicates it is a required field. To the right of the formula editor is a "Functions" dropdown menu listing various mathematical and logical functions such as ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A "Quick Tips" panel on the right provides links to Operators & Functions and Help on this function.



In the **HandsMen Order** object settings:

1. Click **Validation Rules**.
2. Click the **New** button.
3. Configure the rule as follows:
 - **Rule Name:** Total_Amount
 - **Error Condition Formula:**
 - **Total_Amount_c <= 0**
 - **Error Message:** Please Enter Correct Amount
 - **Error Location:**
 - Select **Field**
 - In **Field**, choose **Total Amount**

Click the **Save** button to activate the rule.

- **Inventory:**

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager
- Page Title:** SETUP > OBJECT MANAGER Inventory
- Left Sidebar:**
 - Details
 - Fields & Relationships
 - Page Layouts
 - Lightning Record Pages
 - Buttons, Links, and Actions
 - Compact Layouts
 - Field Sets
 - Object Limits
 - Record Types
 - Related Lookup Filters
 - Search Layouts
 - List View Button Layout
 - Restriction Rules
 - Scoping Rules
 - Object Access
 - Triggers
- Main Content:**

Inventory Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Rule Name	Stock_Quantity	Save	Save & New	Cancel
Active	<input checked="" type="checkbox"/>			
Description				

Error Condition Formula

Example: `Discount_Percent__c>0.30` More Examples...
Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

`Stock_Quantity__c <= 0`

Functions

 - All Function Categories --
 - ABS
 - ACOS
 - ADDMONTHS
 - AND
 - ASCII
 - ASIN

Quick Tips

 - Operators & Functions

* = Required Information

In the **Inventory** object settings:

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager
- Page Title:** SETUP > OBJECT MANAGER Inventory
- Left Sidebar:**
 - Details
 - Fields & Relationships
 - Page Layouts
 - Lightning Record Pages
 - Buttons, Links, and Actions
 - Compact Layouts
 - Field Sets
 - Object Limits
 - Record Types
 - Related Lookup Filters
 - Search Layouts
 - List View Button Layout
 - Restriction Rules
 - Scoping Rules
 - Object Access
 - Triggers
- Main Content:**

Error Condition Formula

Example: `Discount_Percent__c>0.30` More Examples...
Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

`Stock_Quantity__c <= 0`

Functions

 - All Function Categories --
 - ABS
 - ACOS
 - ADDMONTHS
 - AND
 - ASCII
 - ASIN

Error Message

Example: `Discount percent cannot exceed 30%`
This message will appear when Error Condition formula is **true**

Error Message: `The inventory count is never less than zero.`

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field

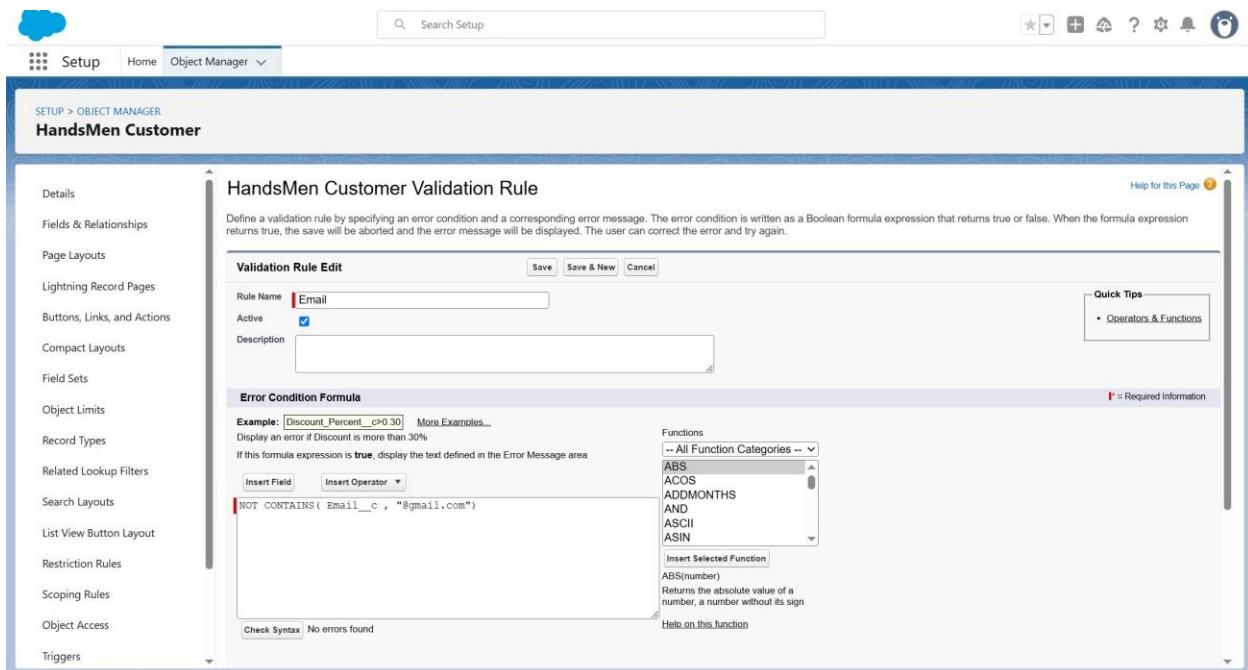
Validation Rule Edit

Rule Name	Stock_Quantity	Save	Save & New	Cancel
-----------	----------------	------	------------	--------

1. Click **Validation Rules**.
2. Click the **New** button.
3. Configure the rule as follows:
 - **Rule Name:** Stock_Quantity
 - **Error Condition Formula:**
 - **Stock_Quantity _ c<=0**
 - **Error Message:** The inventory count is never less than zero
 - **Error Location:** Select Top of Page

Click the **Save** button to activate the rule.

- **HandsMen Customer:**



The screenshot shows the Salesforce Setup interface for creating a Validation Rule. The object being configured is 'HandsMen Customer'. The 'Error Condition Formula' field contains the formula `NOT CONTAINS(Email__c, '@gmail.com')`. The 'Error Message' field contains the message `Please fill correct Gmail`. The 'Error Location' is set to 'Top of Page'. The formula dropdown on the right lists various functions such as ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc.

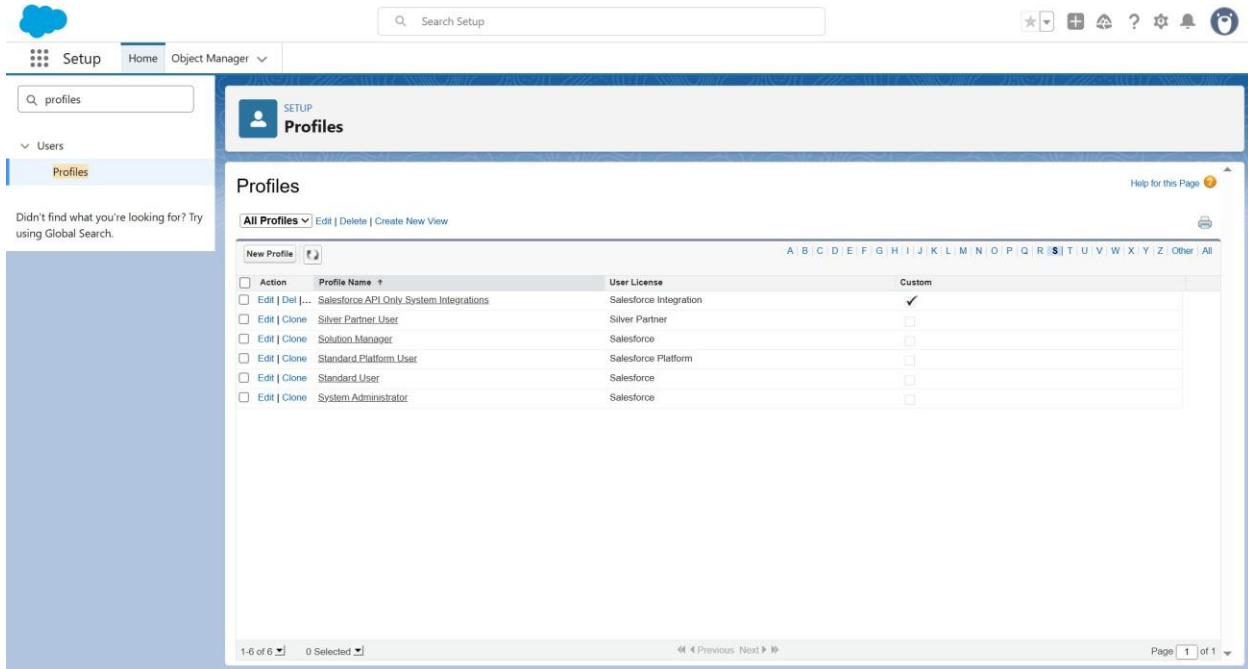
In the **HandsMen Customer** object settings:

1. Click **Validation Rules**.
2. Click the **New** button.
3. Configure the rule as follows:
 - **Rule Name:** Email
 - **Error Condition Formula:**
 - `NOT(CONTAINS>Email__c, "@gmail.com"))`
 - **Error Message:** Please fill correct Gmail
 - **Error Location:** Select Top of Page

Click the **Save** button to activate the rule.

Data Security

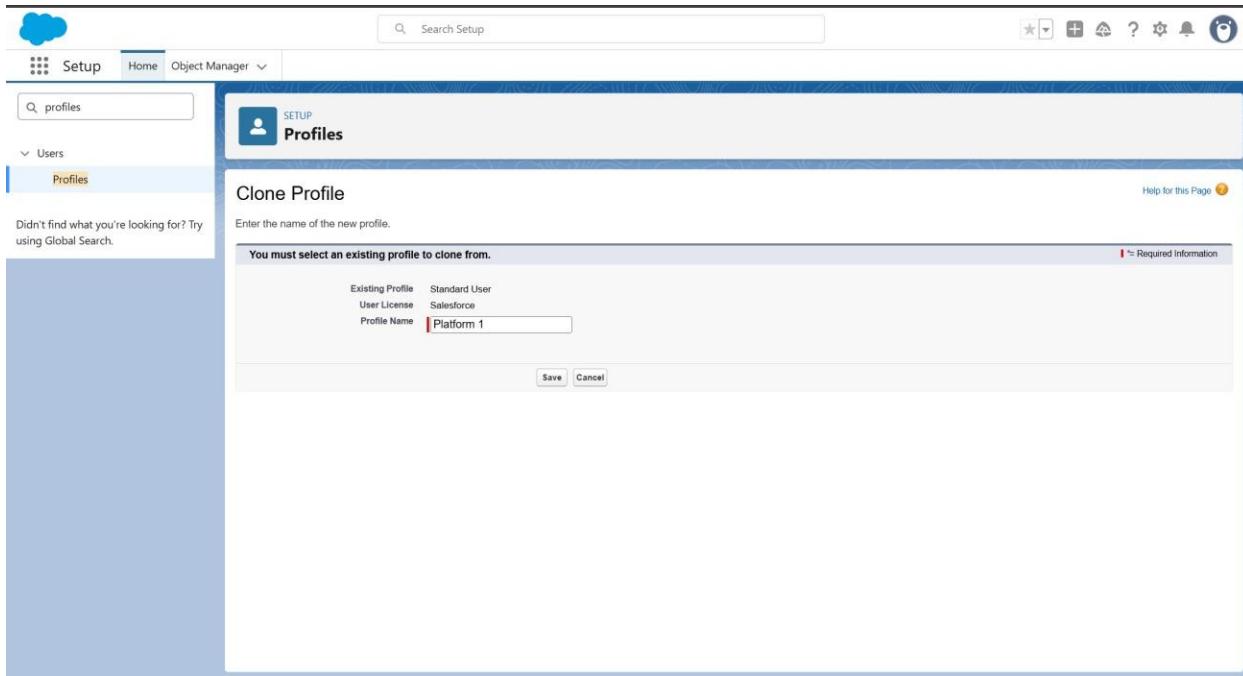
Profiles:



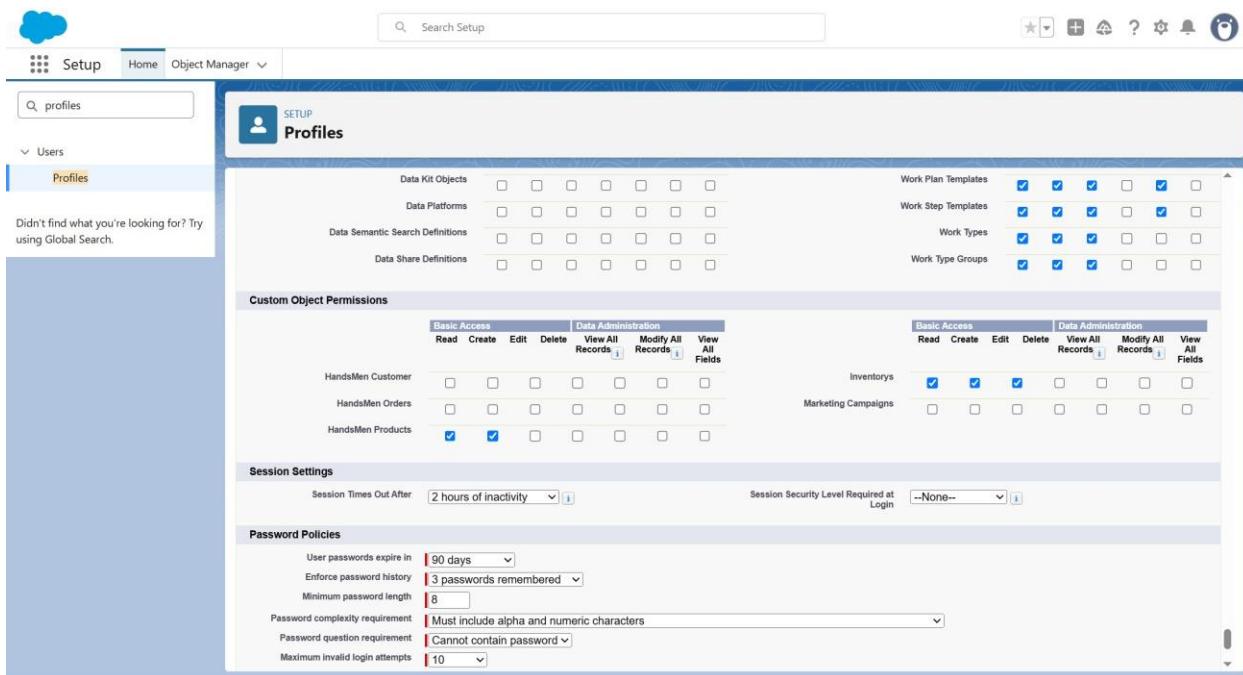
The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar has 'Profiles' highlighted. The main area displays a list of profiles with columns for Action, Profile Name, User License, and Custom. The 'Custom' column contains a checked checkbox for the 'Salesforce Integration' profile.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

In Home, use **Quick Find** to search for **Profiles**. Locate and select the **Standard User** profile, then click the **Clone** button to create a duplicate profile.



In the **Platform Name** field, enter **Platform 1**. Then, click the **Save** button to apply the changes.

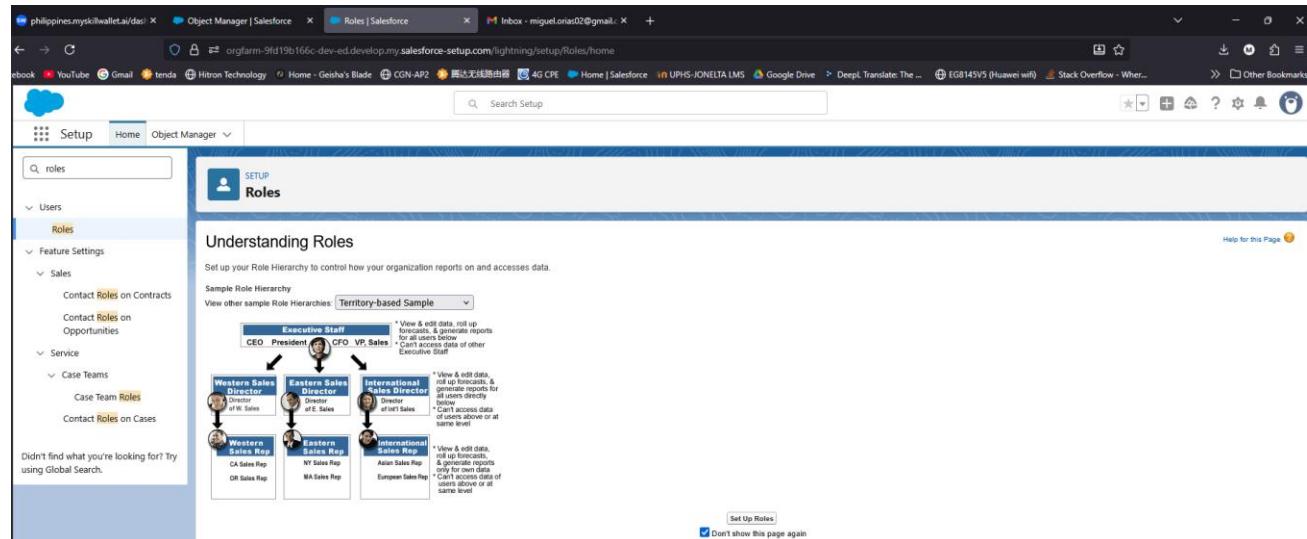


Edit the **Platform 1** profile and navigate to the **Custom Object Permissions** section.

- For **HandsMen Products**, select:
 - **Read**
 - **Create**
- For **Inventorys**, select:
 - **Read**
 - **Create**
 - **Edit**

Then, click **Save** to apply the updated permissions.

Roles:



In **Home**, use **Quick Find** to search for **Roles**, then click the **Set Up Roles** button on the Roles setup page.

The screenshot shows the Salesforce Setup interface with the 'Roles' page open. The left sidebar shows navigation categories like 'Users', 'Sales', 'Service', and 'Case Teams'. Under 'Sales', there are sections for 'Feature Settings', 'Contact Roles on Contracts', 'Contact Roles on Opportunities', and 'Case Team Roles'. A search bar at the top right says 'Search Setup'. The main content area is titled 'Creating the Role Hierarchy' with a sub-section 'Your Organization's Role Hierarchy'. It lists several role nodes with edit, delete, and assign buttons. The 'CEO' node is expanded, showing its children: 'COO', 'Inventory', 'Marketing', 'Sales', 'SVP, Customer Service & Support', 'SVP, Human Resources', and 'SVP, Sales & Marketing'. Each child node also has an 'Add Role' button.

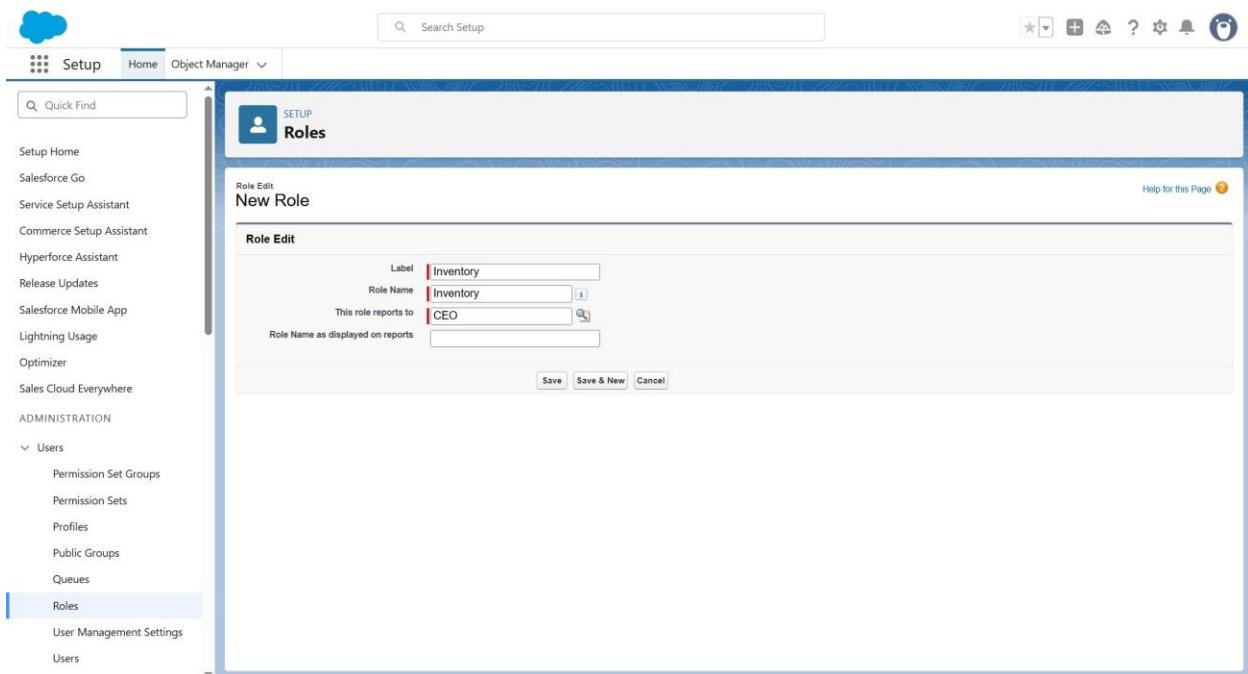
Click **Expand All** in the role hierarchy, then click **Add Role** under the **CEO** node.

In the **Add Role** screen:

The screenshot shows the 'Role Edit' screen for creating a new role. The title is 'New Role'. The form has fields for 'Label' (set to 'Sales') and 'Role Name' (set to 'Sales'). Below that is a 'This role reports to' dropdown menu which is currently set to 'CEO'. There is also a field for 'Role Name as displayed on reports' which is empty. At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

- **Label:** Sales
- **Role Name:** Sales
- **This role reports to:** CEO

Then, click the **Save** button to create the role.

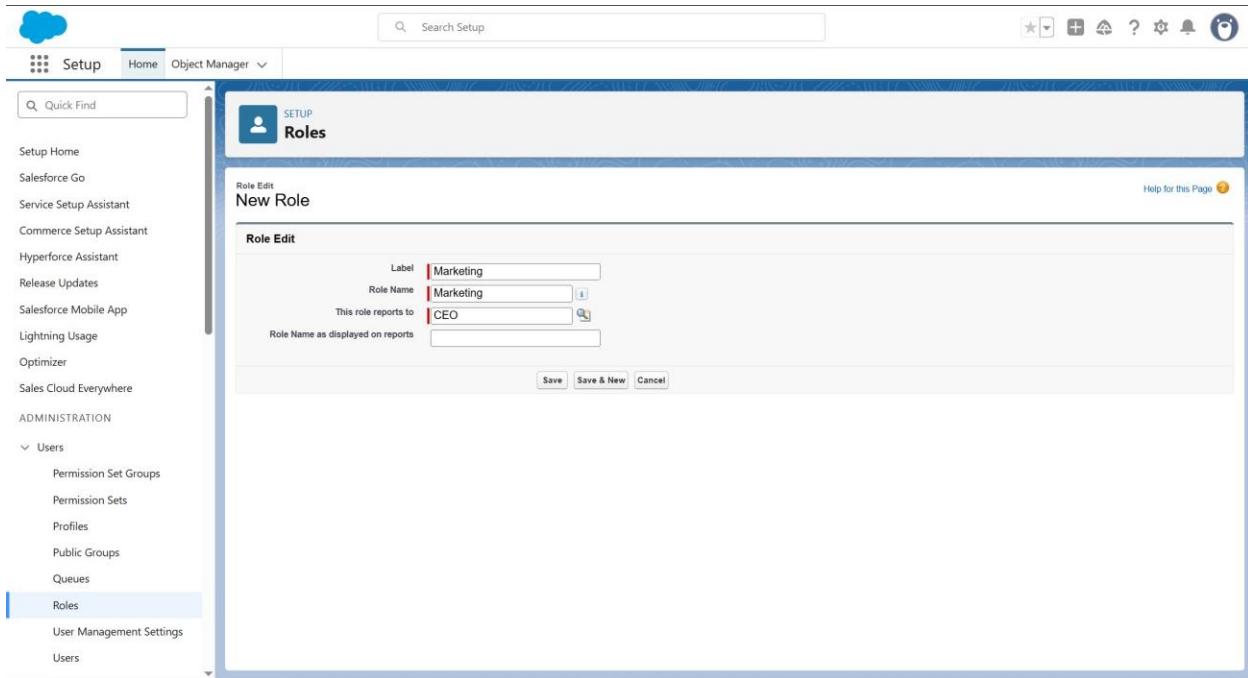


Add another role under the **CEO** node:

- In the **Add Role** screen, enter the following:
 - **Label:** Inventory
 - **Role Name:** Inventory
 - **This role**

reports to: CEO Click the

Save button to create the role.



Add another role under the **CEO** node:

- In the **Add Role** screen, enter the following:
 - **Label:** Marketing
 - **Role Name:** Marketing
 - **This role**

reports to: CEO Click the

Save button to create the role.

Users:

- **Niklaus:**

User Edit
Niklaus Mikaelson Help for this Page 

User Edit		Save	Save & New	Cancel
General Information				
First Name	<input type="text" value="Niklaus"/>	Role	<input type="text" value="Sales"/>	
Last Name	<input type="text" value="Mikaelson"/>	User License	<input type="text" value="Salesforce"/>	
Alias	<input type="text" value="nmika"/>	Profile	<input type="text" value="Platform 1"/>	
Email	<input type="text" value="miguel.orias02@gmail.com"/>	Active	<input checked="" type="checkbox"/>	
Username	<input type="text" value="miguel.orias10@gmail.co"/>	Marketing User	<input type="checkbox"/>	
Nickname	<input type="text" value="User176043325203113108"/>	Offline User	<input type="checkbox"/>	
Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>	
Company	<input type="text"/>	Flow User	<input type="checkbox"/>	
Department	<input type="text"/>	Service Cloud User	<input type="checkbox"/>	
Division	<input type="text"/>	Site.com Contributor User	<input type="checkbox"/>	
Role: Sales User License: Salesforce Profile: Platform 1 Active: <input checked="" type="checkbox"/> Marketing User: <input type="checkbox"/> Offline User: <input type="checkbox"/> Knowledge User: <input type="checkbox"/> Flow User: <input type="checkbox"/> Service Cloud User: <input type="checkbox"/> Site.com Contributor User: <input type="checkbox"/> Site.com Publisher User: <input type="checkbox"/> WDC User: <input type="checkbox"/> Data.com User Type: <input type="text" value="--None--"/> <input type="button" value="..."/>				
Data.com Monthly Addition Limit: <input type="text" value="300"/> <input type="button" value="..."/> Accessibility Mode (Classic Only): <input type="checkbox"/> <input type="button" value="..."/> High-Contrast Palette on Charts: <input type="checkbox"/> <input type="button" value="..."/> Load Lightning Pages While Scrolling: <input checked="" type="checkbox"/> <input type="button" value="..."/> Debug Mode: <input type="checkbox"/> <input type="button" value="..."/> Make Setup My Default Landing Page: <input type="checkbox"/>				

In Home, use **Quick Find** to search for Users.

1. Click the **New User** button.
2. On the Add User page, enter the following details:
 - **First Name:** Niklaus
 - **Last Name:** Mikaelson
 - **Alias:** [your preferred alias]
 - **Email:** [your preferred email]
 - **Username:** [your preferred username]
 - **Nickname:** [your preferred nickname]
 - **Role:** Sales
 - **User License:** Salesforce
 - **Profile:** Platform 1

Click the **Save** button to create the user.

- **Kol:**

In **Home**, use **Quick Find** to search for **Users**.

1. Click the **New User** button.
2. On the Add User page, enter the following details:
 - **First Name:** Kol
 - **Last Name:** Mikaelson
 - **Alias:** [your preferred alias]
 - **Email:** [your preferred email]
 - **Username:** [your preferred username]
 - **Nickname:** [your preferred nickname]
 - **Role:** Inventory
 - **User License:** Salesforce
 - **Profile:** Platform 1

Click the **Save** button to create the user.

- **Create 2 more user:**

User Edit
Daniel Mikaelson

Help for this Page 

User Edit Save | Save & New | Cancel

General Information ! Required Information

First Name	Daniel	Role	Marketing
Last Name	Mikaelson	User License	Salesforce
Alias	dmika	Profile	Platform 1
Email	miguel.orias02@gmail.com	Active	<input checked="" type="checkbox"/>
Username	miguel.orias300@gmail.co	Marketing User	<input type="checkbox"/>
Nickname	User176043349169121086	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	—None—
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Debug Mode	<input type="checkbox"/>

In **Home**, use **Quick Find** to search for Users.

1. Click the **New User** button.
2. On the Add User page, enter the following details:
 - **First Name:** [your preferred first name]
 - **Last Name:** [your preferred last name]
 - **Alias:** [your preferred alias]
 - **Email:** [your preferred email]
 - **Username:** [your preferred username]
 - **Nickname:** [your preferred nickname]
 - **Role:** Marketing
 - **User License:** Salesforce
 - **Profile:** Platform 1

Click the **Save** button to create the user.

User Edit
Odyssey Odysseus

General Information

First Name	Odyssey
Last Name	Odysseus
Alias	Oddy
Email	miguel.orias02@gmail.com
Username	miguel.orias020@gmail.com
Nickname	User176099156695617815
Title	
Company	
Department	
Division	

Role	Sales
User License	Salesforce
Profile	Platform 1
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>

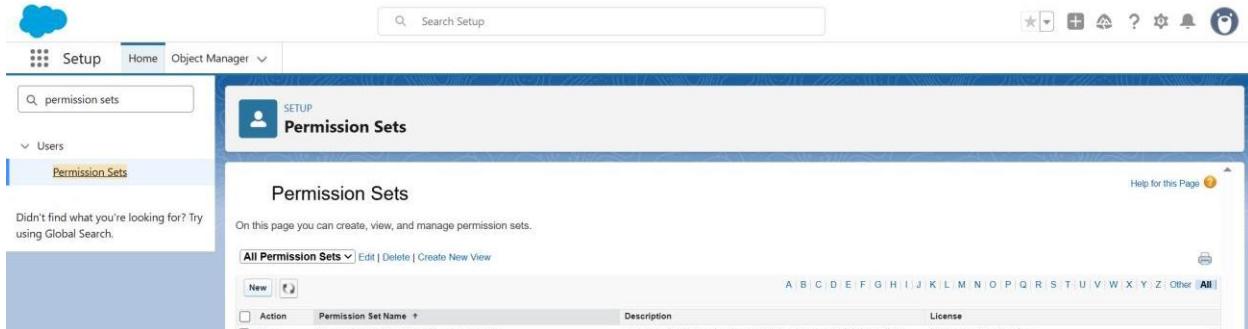
In Home, use **Quick Find** to search for Users.

1. Click the **New User** button.
2. On the Add User page, enter the following details:
 - **First Name:** [your preferred first name]
 - **Last Name:** [your preferred last name]
 - **Alias:** [your preferred alias]
 - **Email:** [your preferred email]
 - **Username:** [your preferred username]
 - **Nickname:** [your preferred nickname]
 - **Role:** Sales
 - **User License:** Salesforce
 - **Profile:** Platform 1

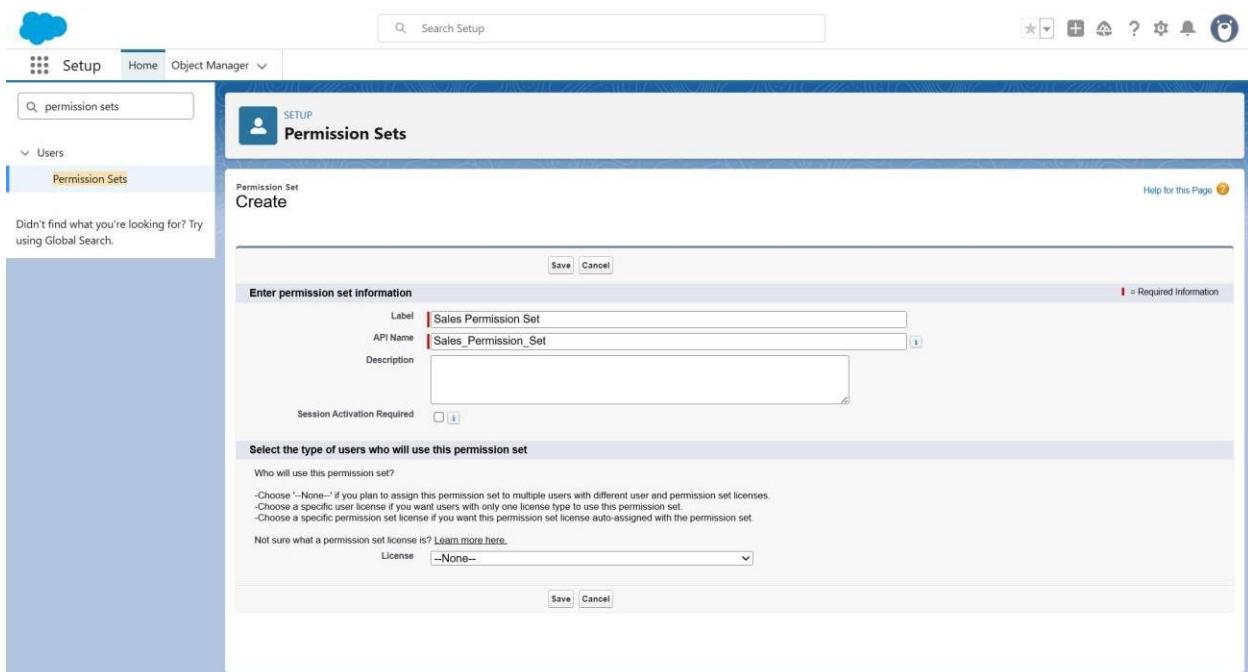
Click the **Save** button to create the user.

Permission Set:

- **Sales Permission Set:**



In Home, use Quick Find to search for Permission Sets, then click the New button to create a new permission set.



In the Add Permission Set screen, enter **Label: Sales Permission Set** and **API Name: Sales_Permission_Set**, then click the Save button.

Search Setup

permission sets

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Sales Permission Set

Find Settings | Clone | Delete | Edit Properties | Manage Assignments | View Summary

Permission Set Overview

Description: License
Session Activation Required:
Permission Set Groups Added To: 0

API Name: Sales_Permission_Set
Namespace Prefix:
Created By: Kristian Josef Banatiao, 10/18/2025, 9:59 PM
Last Modified By: Kristian Josef Banatiao, 10/18/2025, 9:59 PM

Apps

Assigned Apps: Settings that specify which apps are visible in the app menu

Assigned Connected Apps: Settings that specify which connected apps are visible in the app menu

Object Settings: Permissions to access objects and fields, and settings such as tab availability

App Permissions: Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access: Permissions to execute Apex classes

Visualforce Page Access: Permissions to execute Visualforce pages

External Data Source Access: Permissions to authenticate against external data sources

Flow Access: Permissions to execute Flows

In the **Sales Permission Set**, go to **Find Settings**, search for **HandsMen Customer**, then click the **Edit** button to modify its permissions.

Search Setup

permission sets

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Sales Permission Set

Find Settings | Clone | Delete | **Edit Properties** | Manage Assignments | View Summary

Permission Set Overview > Object Settings HandsMen Customer

Save | Cancel

HandsMen Customer

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

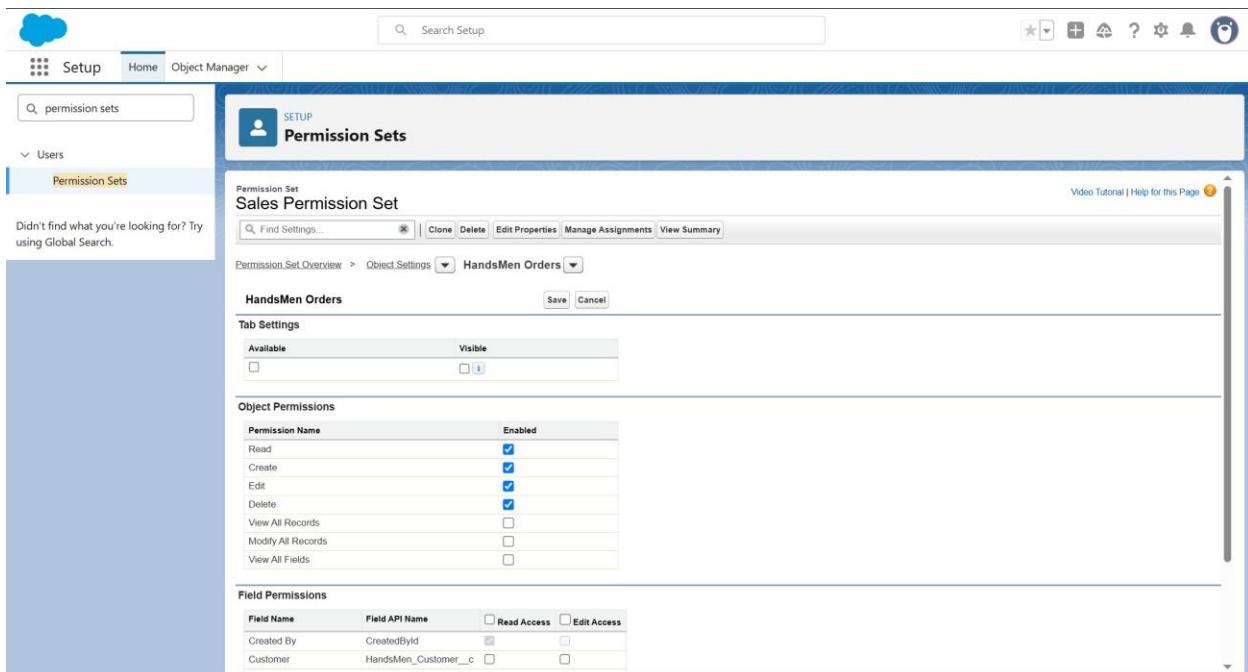
Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Created By	CreatedById	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email	Email_c	<input type="checkbox"/>	<input type="checkbox"/>

In the **Object Permissions** section, enable **Read**, **Create**, **Edit**, and **Delete**, then click the **Save** button to apply the changes.



In the **Sales Permission Set**, go to **Find Settings**, search for **HandsMen Orders**, then click the **Edit** button. In the **Object Permissions** section, enable **Read**, **Create**, **Edit**, and **Delete**, then click the **Save** button.

... > PERMISSION SET 'SALES PERMISSION SET' > MANAGE ASSIGNMENT EXPIRATION

Sales permission set

Select Users to Assign

All Users

1 item selected

Full Name ↑	Alias	Username	Role	Active	Profile
antonio miguel orias	mig	miguel.orias02521@agentforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00dgl00000diodzua1.5lt9ok09mr5r@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Daniel Mikaelson	dmika	miguel.orias300@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform 1
Integration User	integ	integration@00dgl00000diodzua1.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Kol Mikaelson	kmika	miguel.orias200@gmail.com	Inventory	<input type="checkbox"/>	Platform 1
Niklaus Mikaelson	nmika	miguel.orias100@gmail.com	Sales	<input type="checkbox"/>	Platform 1
Odyssey Odysseus	Oddy	miguel.orias020@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1

Search this list...

... > PERMISSION SET 'SALES PERMISSION SET' > MANAGE ASSIGNMENT EXPIRATION

Sales permission set

Select an Expiration Option For Assigned Users

No expiration date (1)

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

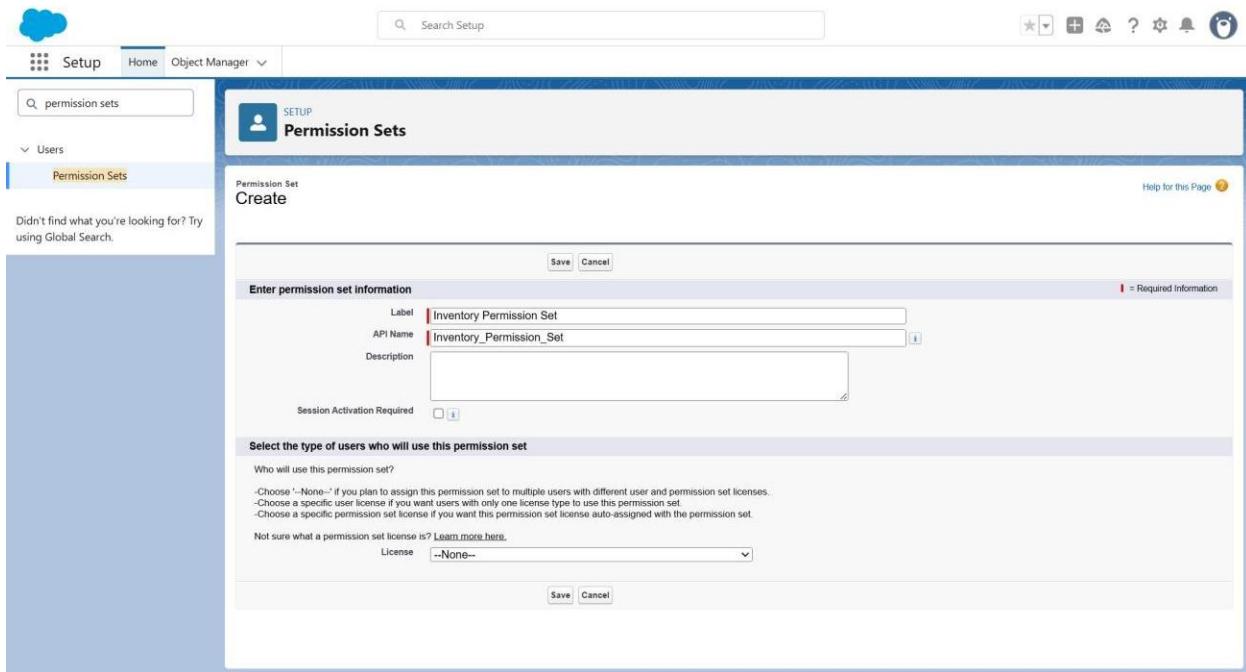
Time Zone Select a time zone...

Selected Users

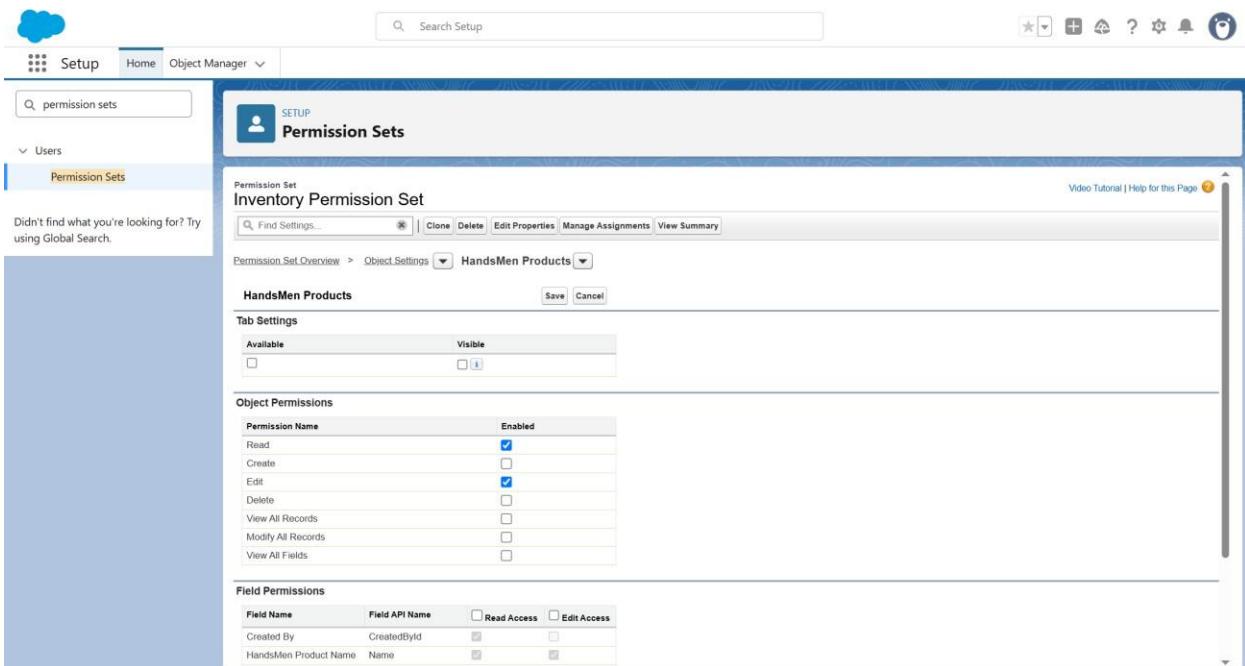
Full Name	Role	Profile	Active	User License	Expires On
Odyssey Odysseus	Sales	Platform 1	<input checked="" type="checkbox"/>	Salesforce	Never Expires

In the **Sales Permission Set**, click the **Manage Assignments** button, then click **Add Assignment**. Select the user with the **Sales** role, click **Next**, and then click **Assign** to complete the process.

- **Inventory Permission Set:**

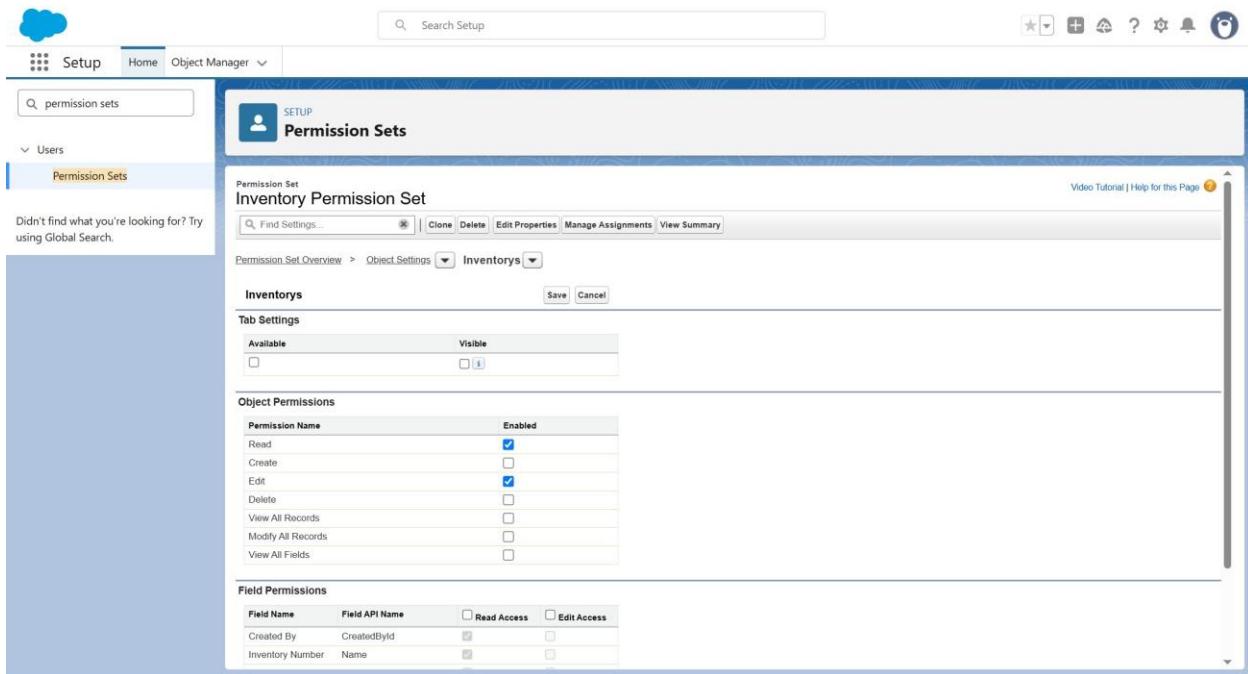


Create a new permission set with the Label **Inventory Permission Set** and API Name **Inventory_Permission_Set**, then click the **Save** button.



In the **Inventory Permission Set**, use the **Find Settings** search bar to locate **HandsMen Products**.

Click the **Edit** button, then enable the **Read** and **Edit** permissions under **Object Permissions**.



In the **Inventory Permission Set**, use the **Find Settings** search bar to locate **Inventorys**. Click the **Edit** button, then enable the **Read** and **Edit** permissions under **Object Permissions**.

... > PERMISSION SET 'INVENTORY PERMISSION SET' > MANAGE ASSIGNMENT EXPIRATION

Inventory permission set

Select Users to Assign

All Users							
1 item selected							
	Full Name	Alias	Username	Role	Active	Profile	
<input type="checkbox"/>	antonio miguel orias	mig	miguel.orias02521@agentforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00dgI00000diodzua1.5lt9ok09mr5r@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User	<input type="checkbox"/>
<input type="checkbox"/>	Daniel Mikaelson	dmika	miguel.orias300@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Marketing	<input type="checkbox"/>
<input type="checkbox"/>	Integration User	integ	integration@00dgI00000diodzua1.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Kol Mikaelson	kmika	miguel.orias200@gmail.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Inventory	<input type="checkbox"/>

Search Setup

Setup Home Object Manager

permission sets

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

... > PERMISSION SET 'INVENTORY PERMISSION SET' > MANAGE ASSIGNMENT EXPIRATION

Inventory Permission Set

Select an Expiration Option For Assigned Users

No expiration date ⓘ

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

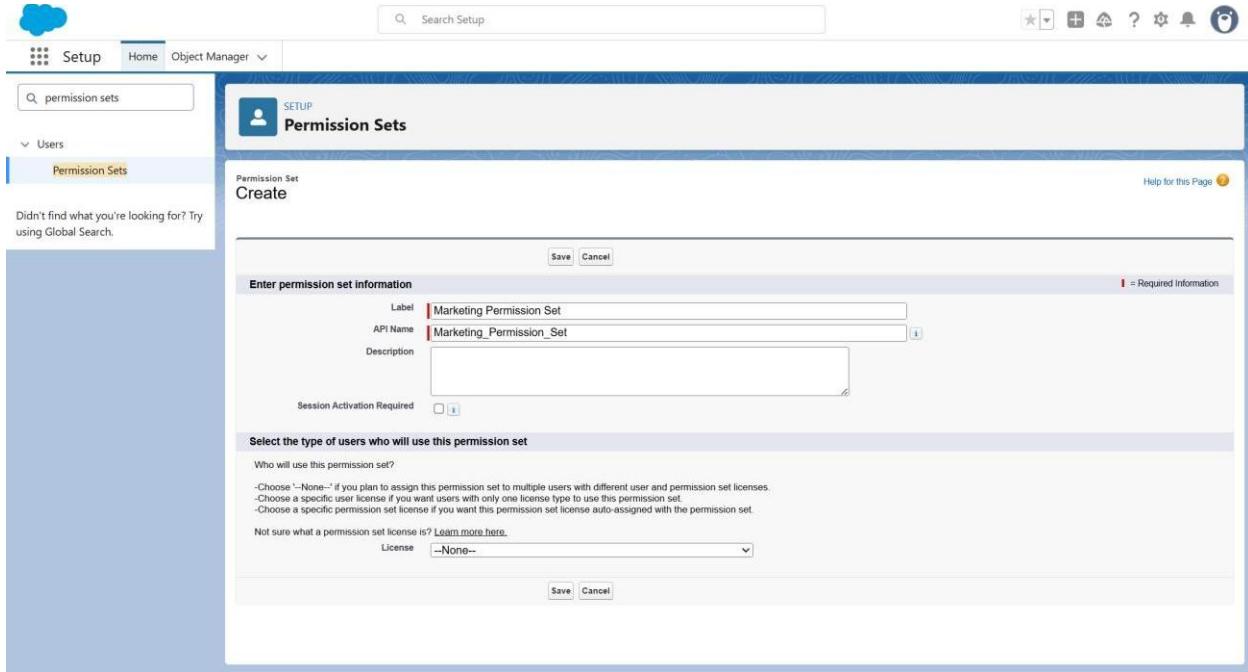
Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Kol Mikaelson	Inventory	Platform 1	<input checked="" type="checkbox"/>	Salesforce	Never Expires

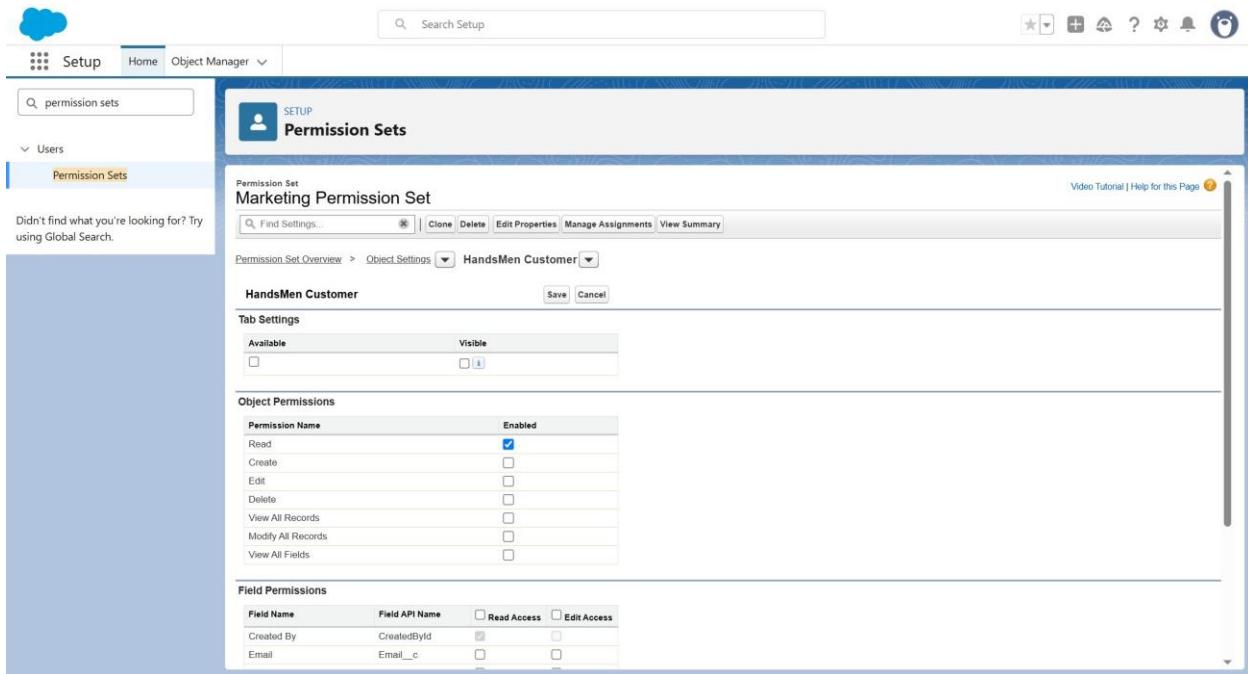
Cancel Back Assign

In the **Inventory Permission Set**, click the **Manage Assignments** button, then click **Add Assignment**. Select the user with the **Inventory** role, click **Next**, and then click **Assign** to complete the process.

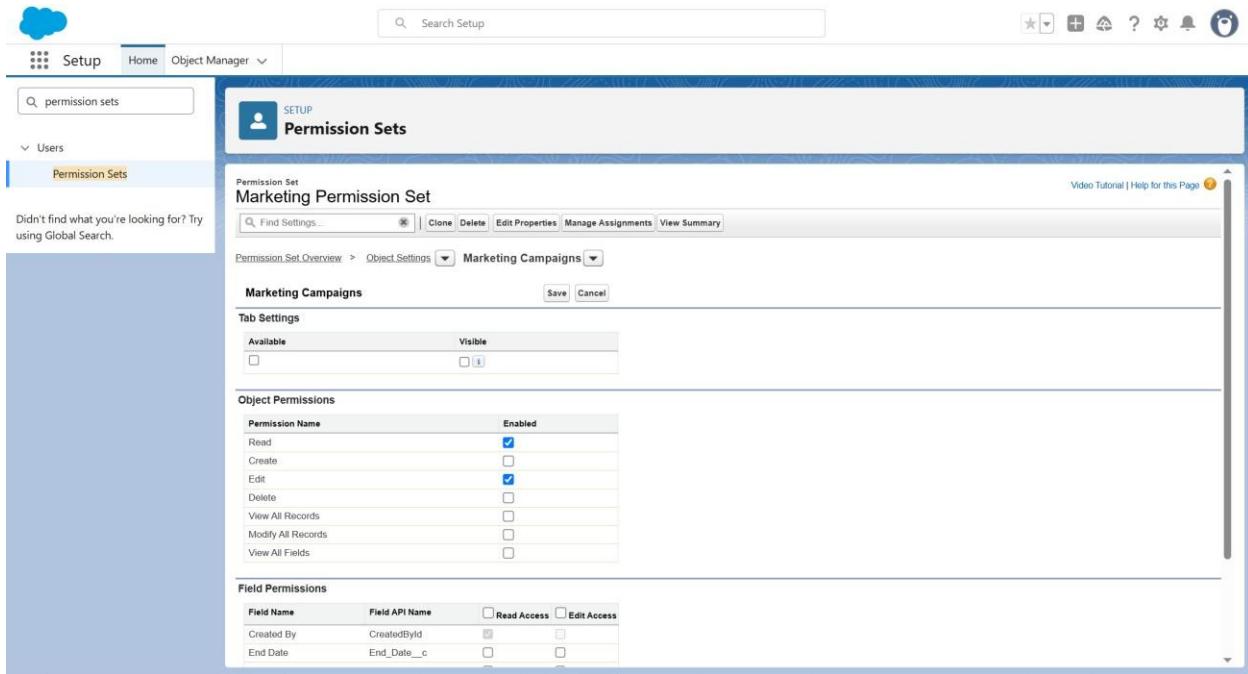
- **Marketing Permission Set:**



Create a new permission set with the Label **Marketing Permission Set** and API Name **Marketing_Permission_Set**, then click the **Save** button.



In the **Marketing Permission Set**, use the **Find Settings** search bar to locate **HandsMen Customer**. Click the **Edit** button, then enable the **Read** permission under **Object Permissions**.



In the **Marketing Permission Set**, use the **Find Settings** search bar to locate **Marketing Campaigns**. Click the **Edit** button, then enable the **Read** and **Edit** permission under **Object Permissions**.

Marketing permission set

Select Users to Assign

All Users ▾

Full Name	Alias	Username	Role	Active	Profile
antonio miguel orias	mig	miguel.orias02521@agentforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00dgl00000di0dzua1.5lt9ok09mr5r@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Daniel Mikaelson	dmika	miguel.orias300@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Platform 1
Integration User	integ	integration@00dgl00000di0dzua1.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Kol Mikaelson	kmika	miguel.orias200@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Platform 1
Niklaus Mikaelson	nmika	miguel.orias100@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Platform 1
Odyssey Odysseus	Oddy	miguel.orias020@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Platform 1
OrgFarm EPIC	OEPIC	epic.1249a352bf93@orgfarm.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator

Marketing permission set

Select an Expiration Option For Assigned Users

No expiration date ⓘ

Specify the expiration date

1 Day | 1 Week | 30 Days | 60 Days | Custom Date

Time Zone
Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Daniel Mikaelson	Marketing	Platform 1	<input checked="" type="checkbox"/>	Salesforce	Never Expires

In the **Marketing Permission Set**, click the **Manage Assignments** button, then click **Add Assignment**. Select the user with the **Marketing** role, click **Next**, and then click **Assign** to complete the process.

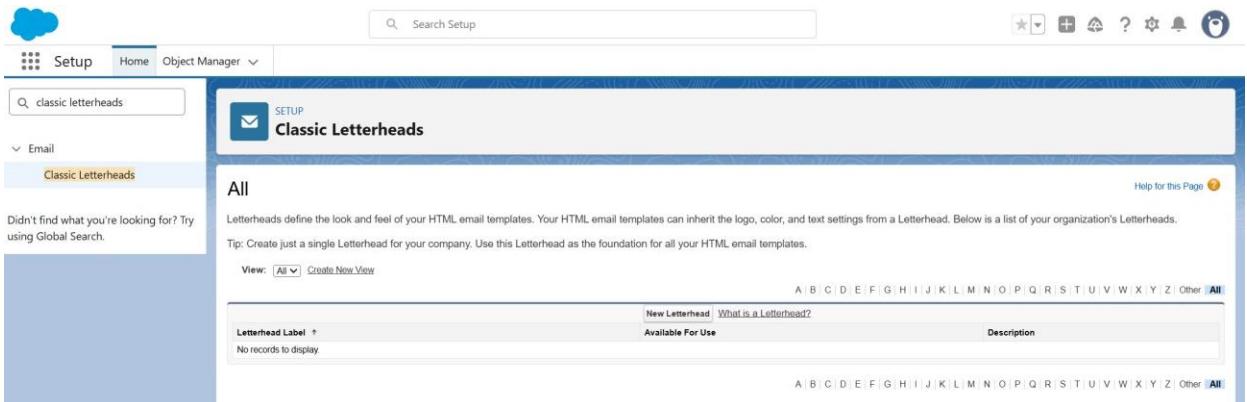
Email Templates

Classic Letterheads:



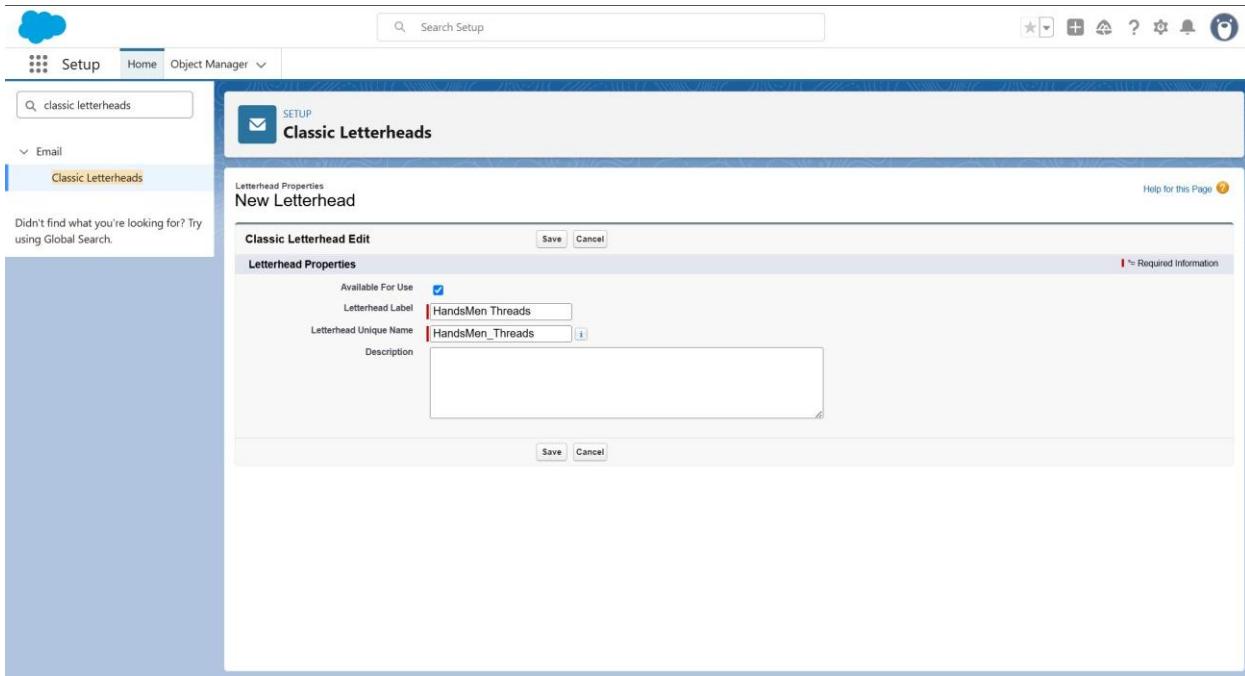
The screenshot shows the Salesforce Setup interface. At the top, there's a search bar with the placeholder 'Search Setup' and a magnifying glass icon. Below the search bar is a navigation bar with icons for Home, Object Manager, and other setup tools. The main content area has a title 'SETUP Classic Letterheads'. Underneath, a section titled 'Understanding Letterheads' contains a tip about letterhead availability. A 'Next' button is visible at the bottom right of this section.

In **Home**, use **Quick Find** to search for **Classic Letterheads**, then click the **Next** button to proceed.



The screenshot shows the Salesforce Setup interface. At the top, there's a search bar with the placeholder 'Search Setup' and a magnifying glass icon. Below the search bar is a navigation bar with icons for Home, Object Manager, and other setup tools. The main content area has a title 'SETUP Classic Letterheads'. Underneath, a section titled 'All' provides information about letterheads and a tip about creating a single letterhead for the company. It includes a 'View' dropdown set to 'All' and a 'Create New View' button. A table header for 'Letterhead Label' is visible, along with a note 'No records to display'. Navigation links for letters A through Z and an 'Other' link are at the bottom of the page.

After clicking the **Next** button in Classic Letterheads, click the **New Letterhead** button to begin creating a new letterhead.



Select **Available For Use**, enter **Letterhead Label: HandsMen Threads** and **Letterhead Unique Name: HandsMen_Threads**, then click the **Save** button.

[Edit Background Color](#)

[Edit Header Properties](#) [Select Logo](#) [Remove Logo](#)

[Edit Top Line](#)

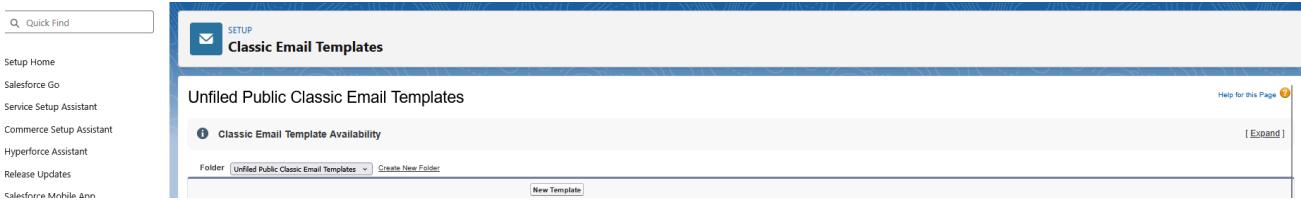
[Edit Body Colors](#)

[Edit Middle Line](#)

[Edit Footer Properties](#) [Select Logo](#) [Remove Logo](#)

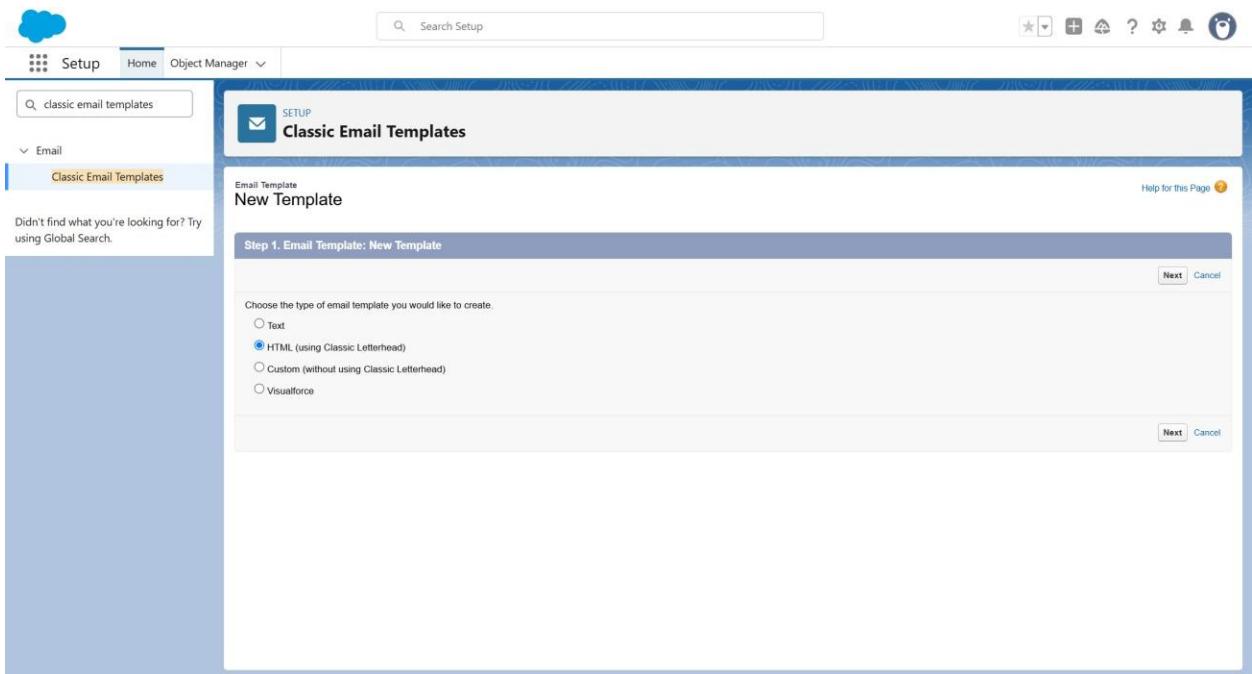
To edit your letterhead, select the letterhead you created, then click the **Edit Letterhead** button.

Order Confirmation Email Template:



The screenshot shows the Salesforce Setup interface. In the top left, there's a 'Quick Find' bar. On the left sidebar, under 'Setup Home', are links for 'Salesforce Go', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Hyperforce Assistant', 'Release Updates', and 'Calendar Mobile App'. The main content area has a title 'SETUP Classic Email Templates' and a sub-section 'Unfiled Public Classic Email Templates'. It includes a 'Classic Email Template Availability' section, a folder navigation bar ('Folder: Unfiled Public Classic Email Templates' with a dropdown arrow), and a 'Create New Folder' link. At the bottom right of the main area is a 'New Template' button. A small 'Help for this Page' link is in the top right corner.

In **Home**, use **Quick Find** to search for **Classic Email Templates**, then click the **New Template** button to create a new email template.



This screenshot shows the 'New Template' creation process. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The left sidebar shows 'Email' expanded, with 'Classic Email Templates' selected. A message at the top says 'Didn't find what you're looking for? Try using Global Search.' The main content area has a title 'SETUP Classic Email Templates' and a sub-section 'Email Template New Template'. Below this is a step header 'Step 1. Email Template: New Template'. The form asks 'Choose the type of email template you would like to create.' with four options: 'Text' (radio button), 'HTML (using Classic Letterhead)' (radio button, selected), 'Custom (without using Classic Letterhead)' (radio button), and 'Visualforce' (radio button). At the bottom right of the step panel are 'Next' and 'Cancel' buttons. The overall interface is the classic Salesforce design.

In Step 1, select the email template type as **HTML (using Classic Letterhead)**, then click the **Next** button to proceed.

In Step 2, configure the **Email Template Information** as follows:

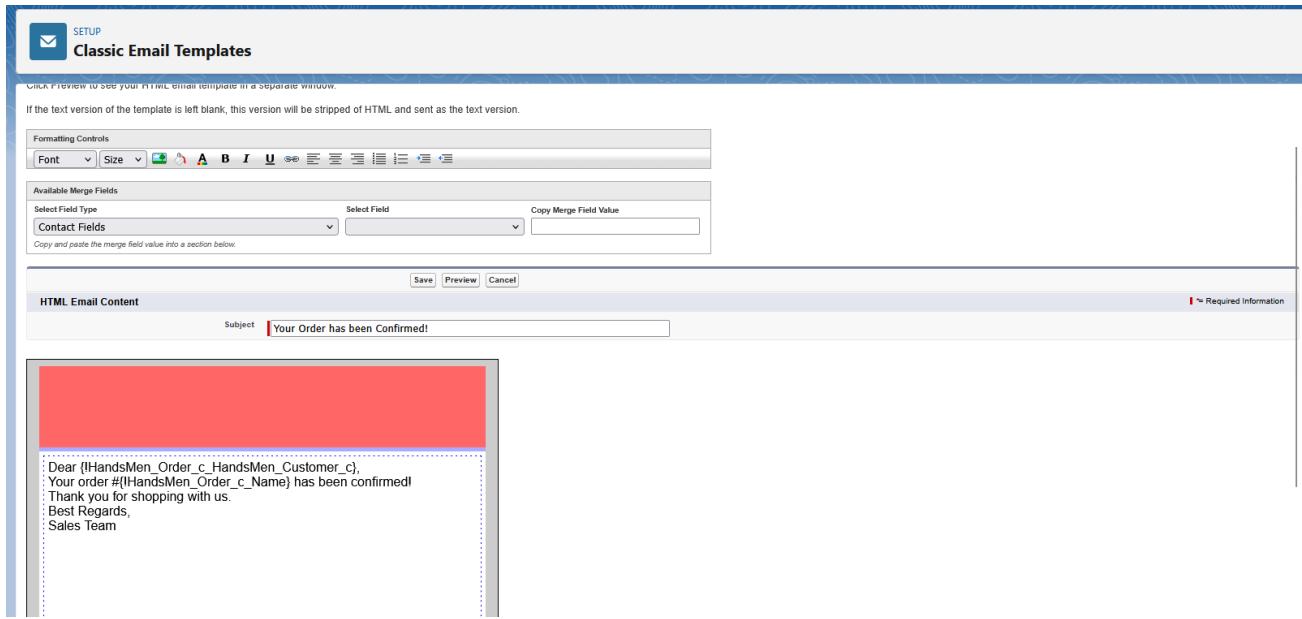
The screenshot shows the Salesforce Setup interface with the 'Classic Email Templates' page open. The page title is 'Classic Email Templates' and the sub-section is 'HTML Email Template New Template'. The form is titled 'Step 2. HTML Email Template: New Template' and is labeled 'Step 2 of 4'. The 'Email Template Information' section contains the following fields:

Folder	Unfiled Public Classic Email Templates
Available For Use	<input checked="" type="checkbox"/>
Email Template Name	Order_Confirmation_Email
Template Unique Name	Order_Confirmation_Email
Classic Letterhead	HandsMen Threads
Email Layout	Free Form Letter
Encoding	Unicode (UTF-8)
Description	[Empty]
Subject	Your Order has been Confirmed!

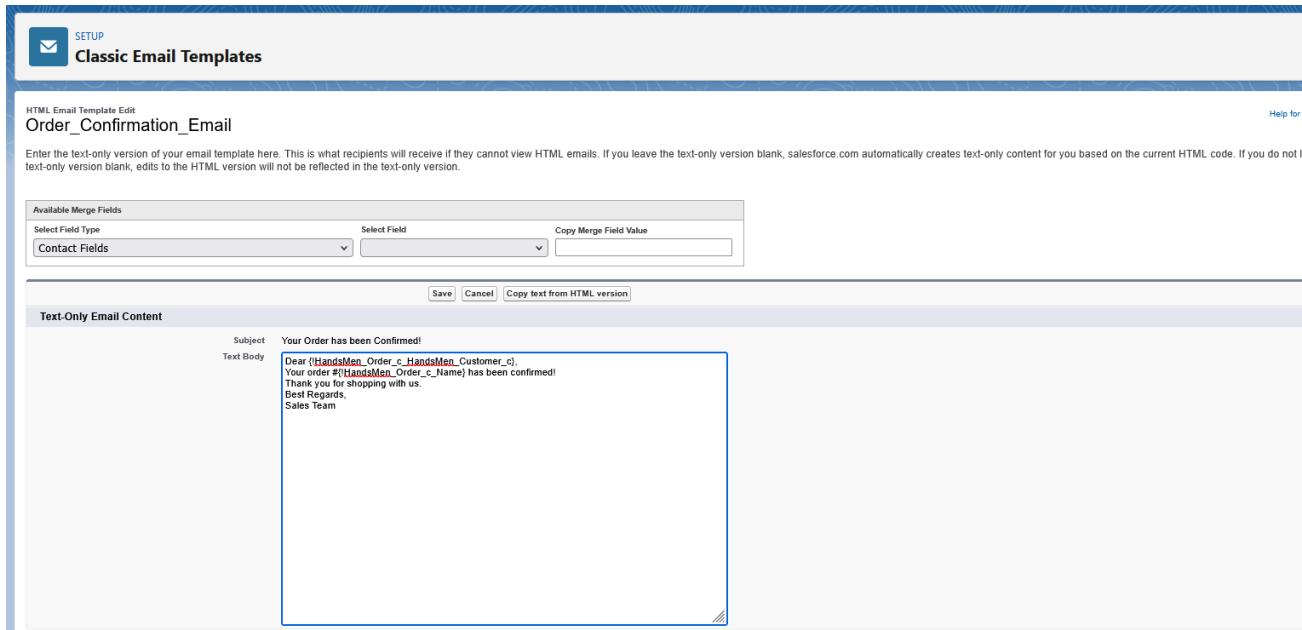
At the bottom right of the form, there are 'Previous', 'Next', and 'Cancel' buttons. The 'Next' button is highlighted.

- **Folder:** Unified Public Classic Email Templates
- **Available for Use:** Selected
- **Email Template Name:** Order_Confirmation_Email
- **Template Unique Name:** Order_Confirmation_Email
- **Classic Letterhead:** HandsMen Threads
- **Email Layout:** Free Form Letter
- **Encoding:** Unicode (UTF-8)
- **Description:** Optional
- **Subject:** [Enter your preferred subject]

Then, click the **Next** button to proceed.

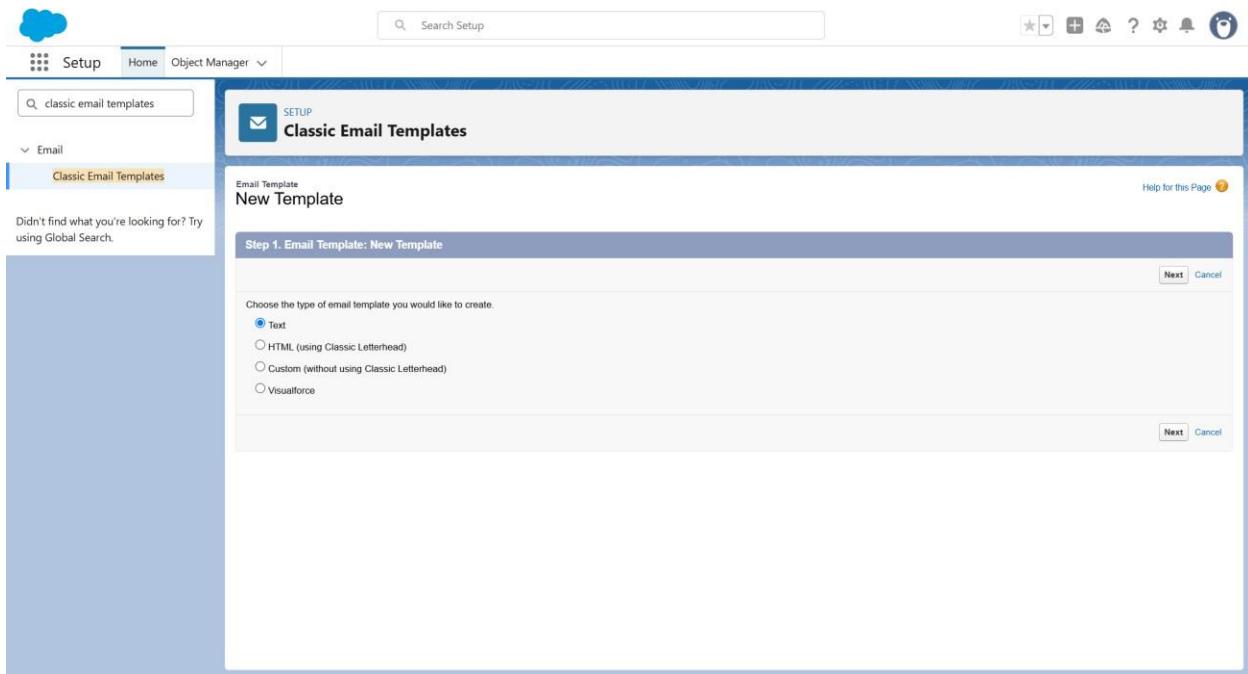


In **Step 3**, add the **content** of your letter in the body section of the email template. This is where you can write your message, include merge fields if needed, and format the text according to your preferred layout and tone. Once you're satisfied with the content, click the **Next** button to proceed.



In Step 4, click the **Copy text from HTML version** button, confirm by clicking **OK**, then click the **Save** button to finalize the email template.

Low Stock Alert Email Template:



Create another **new template** and in **Step 1**, select the email template type as **Text**, then click the **Next** button to proceed.

Edit Text Email Template
Low Stock Alert

Use merge fields to personalize your email content. You can add substitute text to any merge field. Substitute text displays only if the merge record does not contain data for that field. Enter substitute text after a comma in the merge field. When you save the template, the merge field will appear in the email body of the template with the following syntax: {!NullValue(Contact.FirstName,"Sir or Madam")}. Click on the link below to see a sample email template.

[View Sample Template](#)

Note that the Description field is for internal use only. It will be listed as the title of any email activities you log when sending mass email.

Available Merge Fields

Select Field Type	Select Field	Copy Merge Field Value
Contact Fields		

Copy and paste the merge field value into your template below.

Email Template Edit

Email Template Information

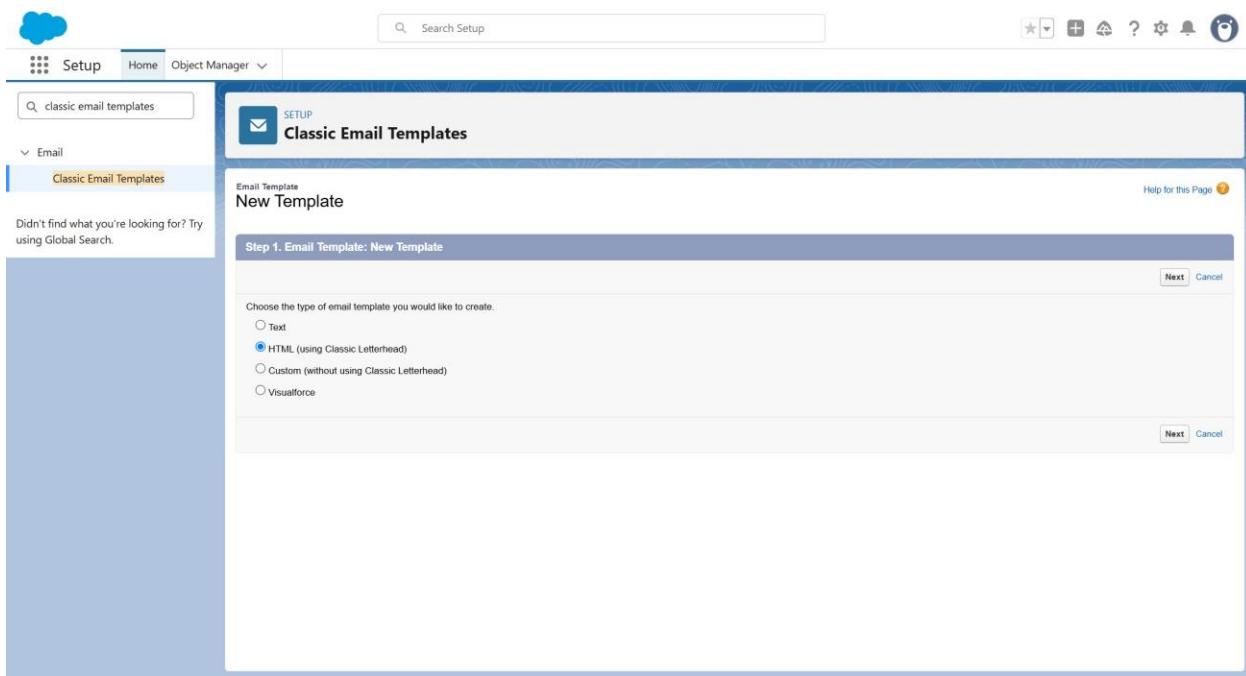
Folder	Unfiled Public Classic Email Templates
Available For Use	<input checked="" type="checkbox"/>
Email Template Name	Low Stock Alert
Template Unique Name	Low_Stock_Alert
Encoding	Unicode (UTF-8)
Description	
Subject	Your Order has been Confirmed!
Email Body	<p>Dear Inventory Manager,</p> <p>This is to inform you that the stock for the following product is running low:</p> <p>Product Name: {!Inventory__c.HandsMen_Product__c}</p> <p>Current Stock Quantity: {!Inventory__c.Stock_Quantity__c}</p> <p>Please take the necessary steps to restock this item immediately.</p> <p>Best Regards,</p> <p>Inventory Monitoring System</p>

In Step 2, configure the **Email Template Information** as follows:

- **Folder:** Unified Public Classic Email Template
- **Available For Use:** Selected
- **Email Template Name:** Low Stock Alert
- **Template Unique Name:** Low_Stock_Alert
- **Encoding:** Unicode (UTF-8)
- **Description:** Optional
- **Subject:** [Your preferred subject]
- **Email Body:** [Your preferred email message]

Then, click the **Save** button to finalize the template. **Loyal**

Program Email Template:



Create another **new template** and in **Step 1**, select the email template type as **HTML (using Classic Letterhead)**, then click the **Next** button to proceed.

The screenshot shows the 'Edit HTML Email Template' screen for creating a new email template named 'Loyalty Program Email'. The 'Available Merge Fields' section is visible at the top, followed by instructions to use an existing Classic Letterhead and select a pre-defined Email Layout. The 'Email Template Information' section contains the following configuration:

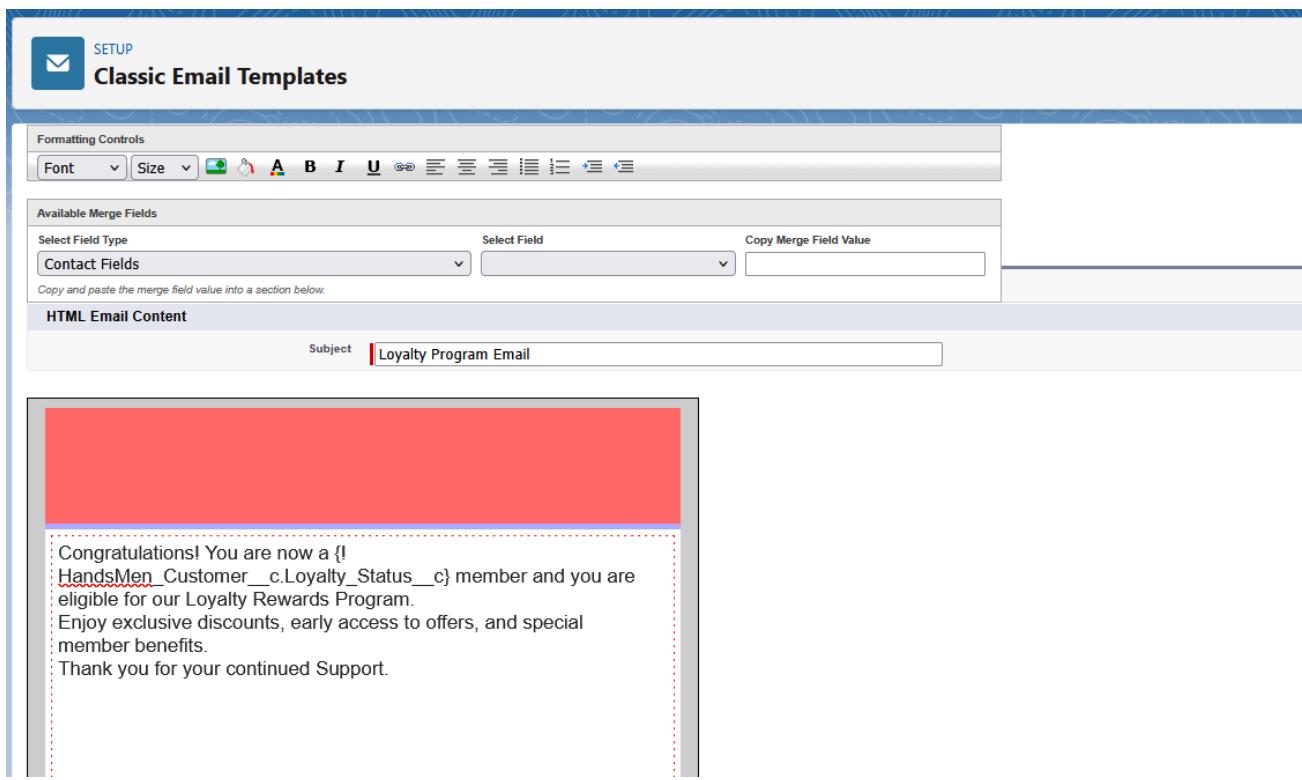
- Folder:** Unfiled Public Classic Email Templates
- Available For Use:** Selected (checkbox checked)
- Email Template Name:** Loyalty Program Email
- Template Unique Name:** Loyalty_Program_Email
- Classic Letterhead:** HandsMen Threads
- Email Layout:** Free Form Letter
- Encoding:** Unicode (UTF-8)
- Description:** [Optional]
- Subject:** Loyalty Program Email

At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

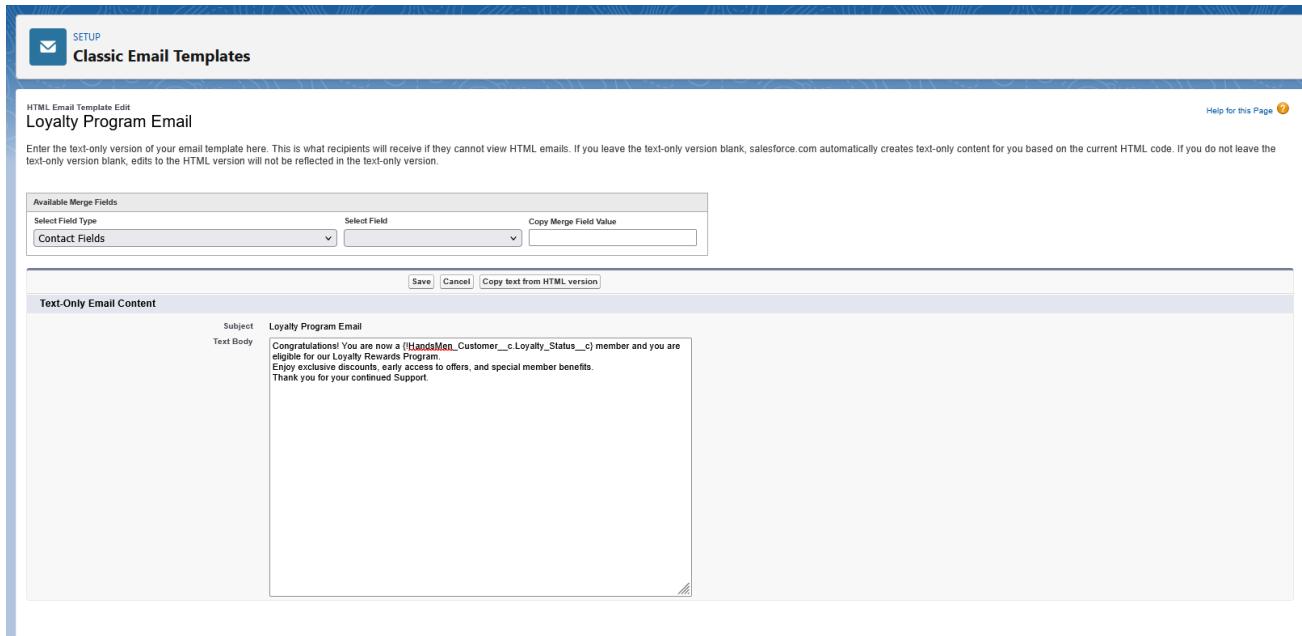
In Step 2, configure the **Email Template Information** as follows:

- **Folder:** Unified Public Classic Email Templates
- **Available for Use:** Selected
- **Email Template Name:** Loyalty Program Email
- **Template Unique Name:** Loyalty_Program_Email
- **Classic Letterhead:** HandsMen Threads
- **Email Layout:** Free Form Letter
- **Encoding:** Unicode (UTF-8)
- **Description:** Optional
- **Subject:** [Enter your preferred subject]

Then, click the **Next** button to proceed.



In **Step 3**, add the **content** of your letter in the body section of the email template. This is where you can write your message, include merge fields if needed, and format the text according to your preferred layout and tone. Once you're satisfied with the content, click the **Next** button to proceed.



In Step 4, click the **Copy text from HTML version** button, confirm by clicking **OK**, then click the **Save** button to finalize the email template.

- Before creating the Email Alert, first create the Customer Email by following these steps:

The screenshot shows the Salesforce Setup interface for the HandsMen Order object. The left sidebar lists various configuration options like Details, Page Layouts, Lightning Record Pages, etc. The main pane is titled 'Fields & Relationships' and shows a list of field types. The 'Email' type is selected, and its description and usage details are displayed on the right.

Email

- Allows users to select a True (checked) or False (unchecked) value.
- Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Allows users to enter a date or pick a date from a popup calendar.
- Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Allows users to enter any number. Leading zeros are removed.
- Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Allows users to enter any phone number. Automatically formats it as a phone number.
- Allows users to select a value from a list you define.
- Allows users to select multiple values from a list you define.
- Allows users to enter any combination of letters and numbers.
- Allows users to enter up to 255 characters on separate lines.
- Allows users to enter up to 131,072 characters on separate lines.
- Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Allows users to enter any combination of letters and numbers and store them in encrypted form.
- Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40 50 600" are all valid times for this field.

In the **HandsMen Order** object settings, click **Fields & Relationships**, then click the **New** button. In **Step 1**, select the **Email** data type to create a new email field.

The screenshot shows the process of creating a new custom field named 'Customer Email'. The 'Field Label' is set to 'Customer Email' and the 'Field Name' is 'Customer_Email'. The 'Required' checkbox is checked. The 'Default Value' section contains a formula editor with the placeholder 'Show Formula Editor'.

Step 2. Enter the details

Field Label: Customer Email

Field Name: Customer_Email

Description: (empty)

Help Text: (empty)

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

External ID: Set this field as the unique record identifier from an external system

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

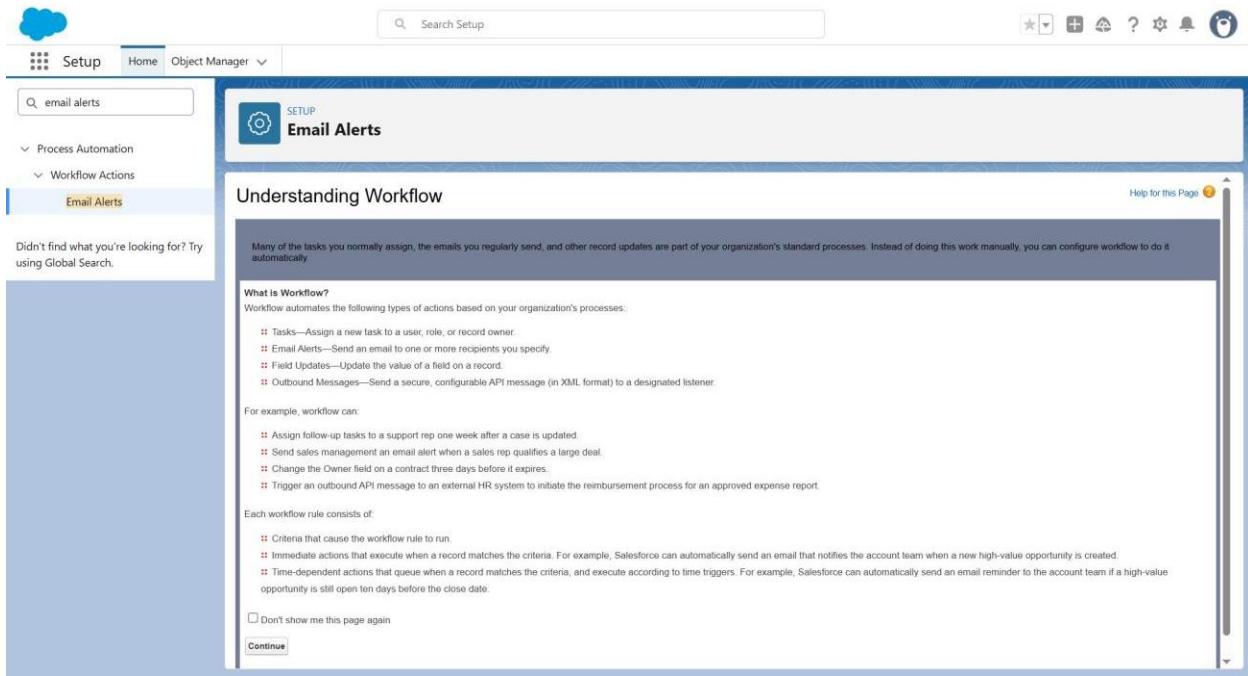
Use formula syntax. Enclose text and picklist value API names in double quotes ('The_Inv'), include numbers without quotes (25), show percentages as decimals (.10), and express date calculations in the standard format. (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadataType__r.Id.RecordName.Field__c

In Step 2 of creating the new field on the **HandsMen Order** object, configure the field as follows:

- **Field Label:** Customer Email
- **Field Name:** Customer_Email (auto-populated based on the label)
- **Required:** Selected (check the box to make this field mandatory)

Then, click **Next** through the remaining steps, accepting the default settings or adjusting as needed, and finally click the **Save** button to create the field.

Email Alert setup:



In the **Home** tab, use the **Quick Find** search bar to search for **Email Alerts**, then click the **Continue** button.

The screenshot shows the Salesforce Setup interface with the 'Email Alerts' tab selected. The left sidebar includes 'Process Automation', 'Workflow Actions', and 'Email Alerts'. A search bar at the top has 'email alerts' typed into it. The main content area is titled 'Email Alerts' and displays a table with columns: Description, Email Template Name, Object, and Last Modified Date. A message states 'No records to display'. Navigation links for letters A-Z and 'Other' are at the bottom of the table.

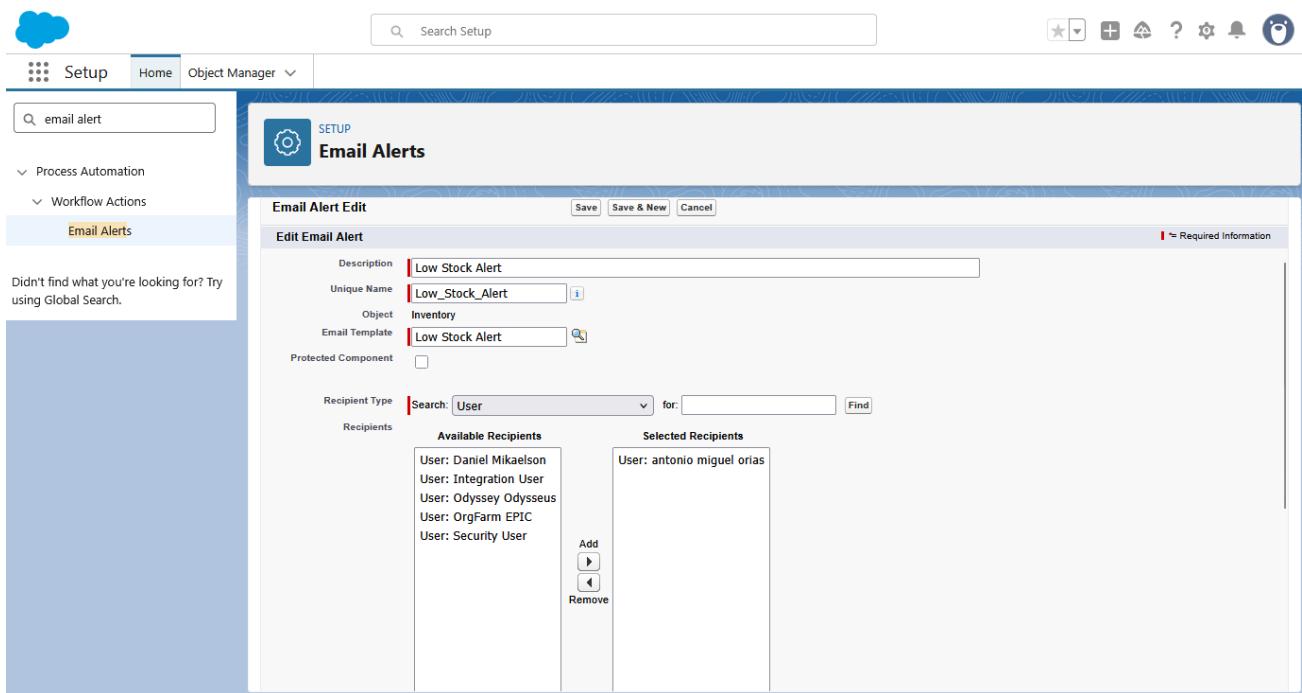
Click the **New Email Alert** button.

Configure the following:

The screenshot shows the 'Edit Email Alert' configuration screen. The 'Description' field is set to 'Order Confirmation Email Alert', 'Unique Name' is 'Order_Confirmation_Email', 'Object' is 'HandsMen Order', and 'Email Template' is 'Order_Confirmation_Email'. Under 'Recipients', the 'Recipient Type' is 'Email Field'. The 'Available Recipients' list contains '-None-' and the 'Selected Recipients' list contains 'Email Field: Customer Email'. Buttons for 'Add' and 'Remove' are visible between the two lists. A note at the bottom says 'You can enter up to five (5) email addresses to be notified.' An 'Additional Emails' input field is also present.

- **Description:** Order Confirmation Email Alert
- **Unique Name:** Order_Confirmation_Email_Alert
- **Object:** HandsMen Order
- **Email Template:** Order_Confirmation_Email
- **Recipient Type:** Email Field
- **Recipients:** Email Field: Customer Email

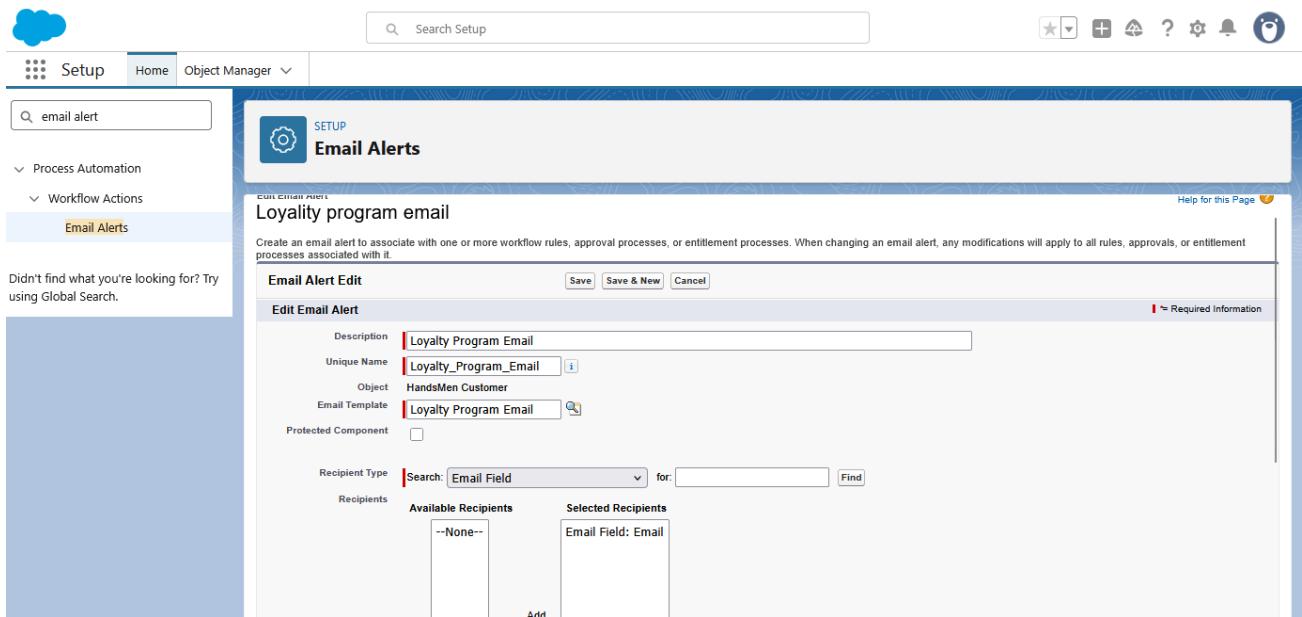
Then click **Save & New** button.



Create a new email alert and configure it as follows:

- **Description:** Low Stock Alert
- **Unique Name:** Low_Stock_Alert
- **Object:** Inventory
- **Email Template:** Low Stock Alert
- **Recipient Type:** User
- **Recipient:** [your name]

Then click the **Save & New** button.

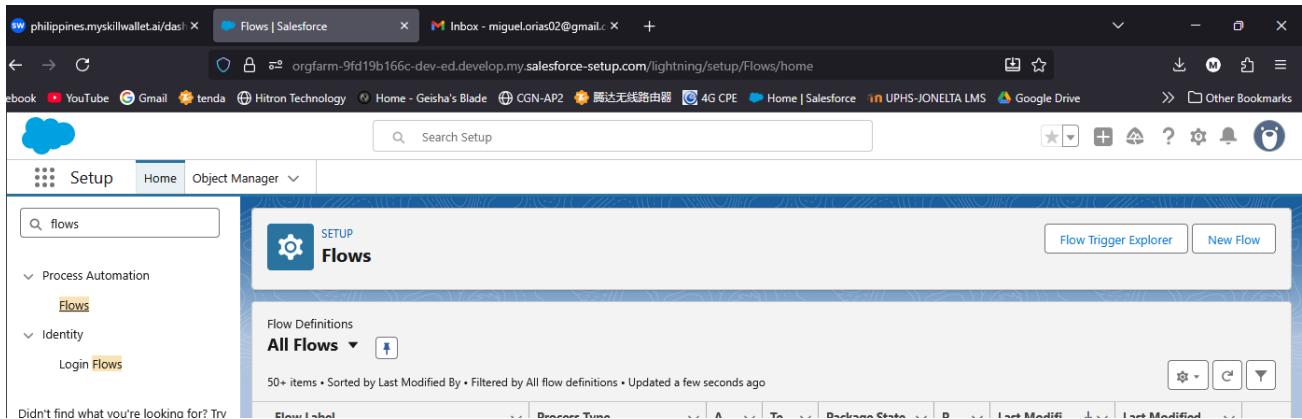


Create a new email alert and configure it as follows:

- **Description:** Loyalty Program Email
- **Unique Name:** Loyalty_Program_Email
- **Object:** HandsMen Customer
- **Email Template:** Loyalty Program Email
- **Recipient Type:** Email Field
- **Recipient:** Email Field: Email

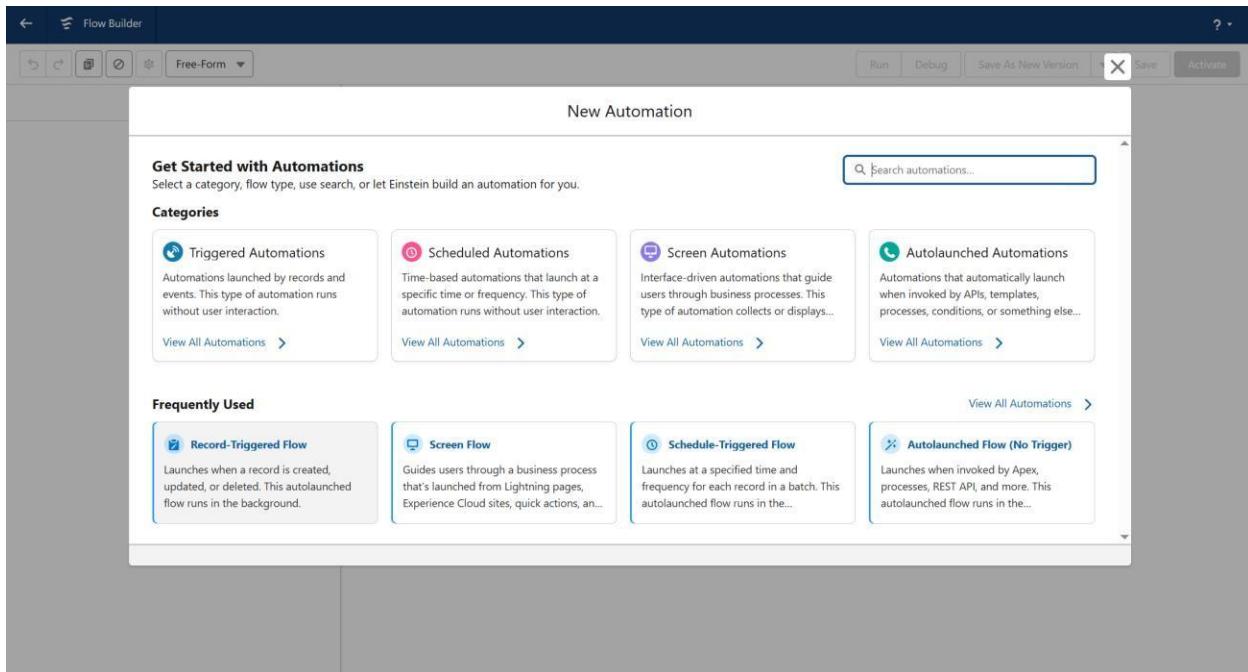
Then click the **Save** button.

Flows

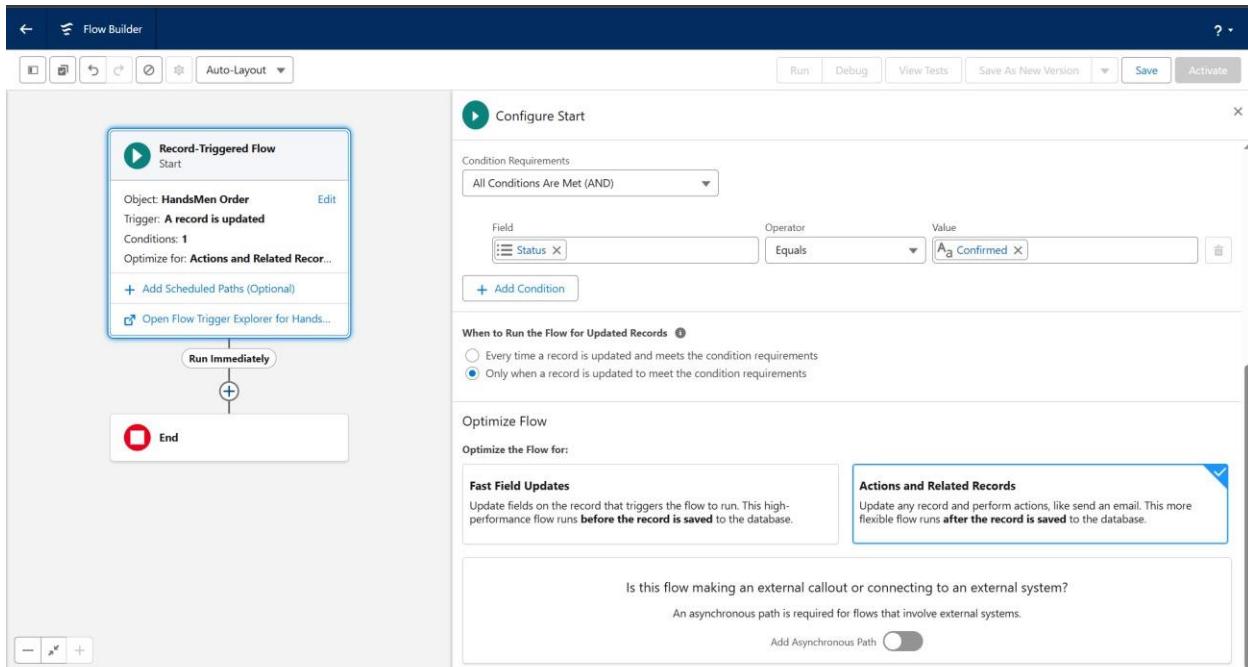
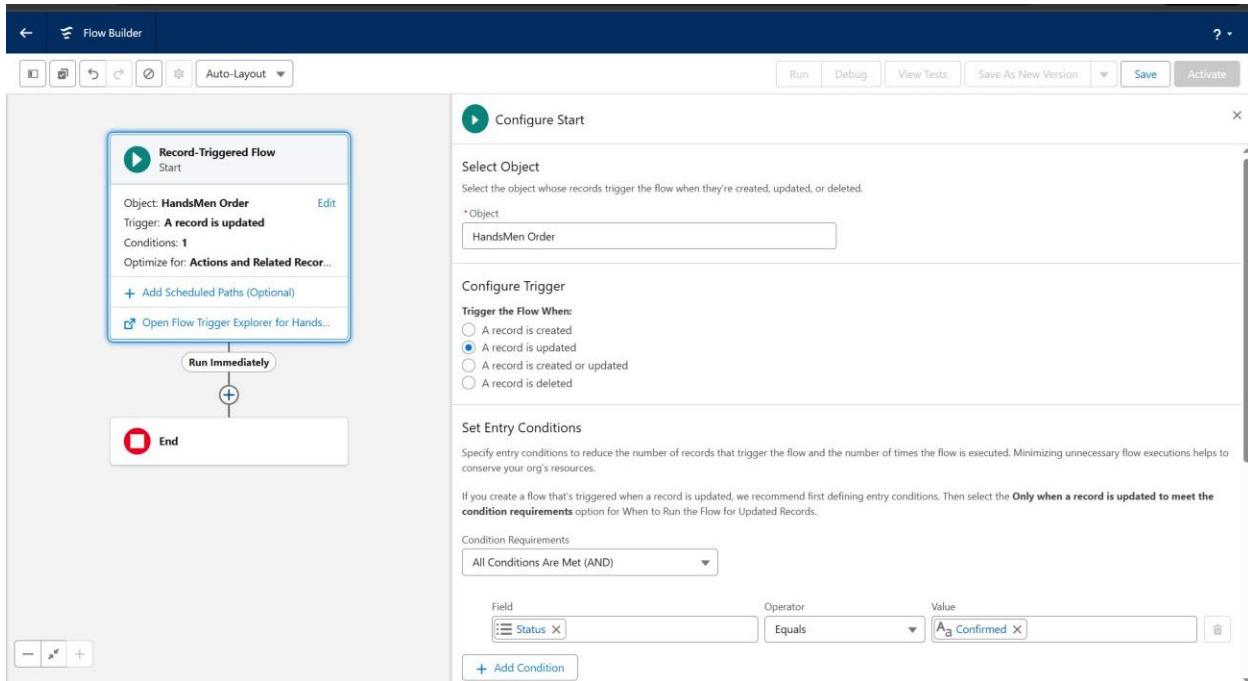


In **Home**, use **Quick Find** to search for **Flows**, then click the **New Flow** button to begin creating a new flow.

Record Triggered:



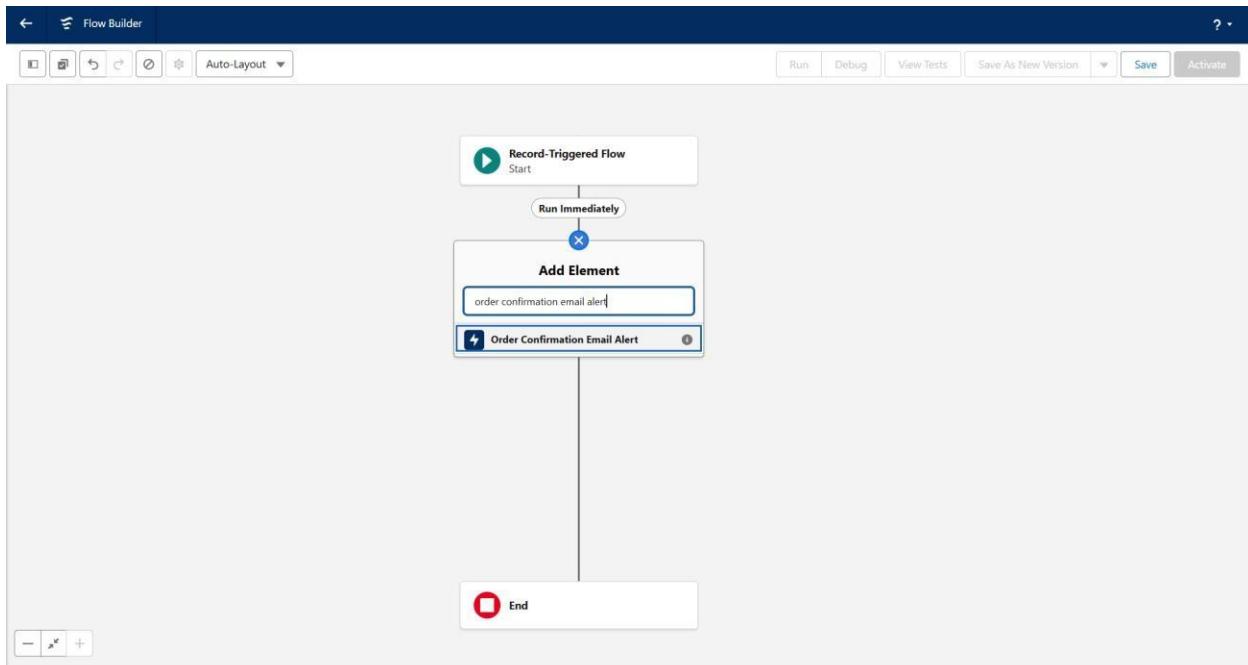
In **Flow Builder**, select **Record-Triggered Flow** as the flow type to begin automating processes based on record changes.



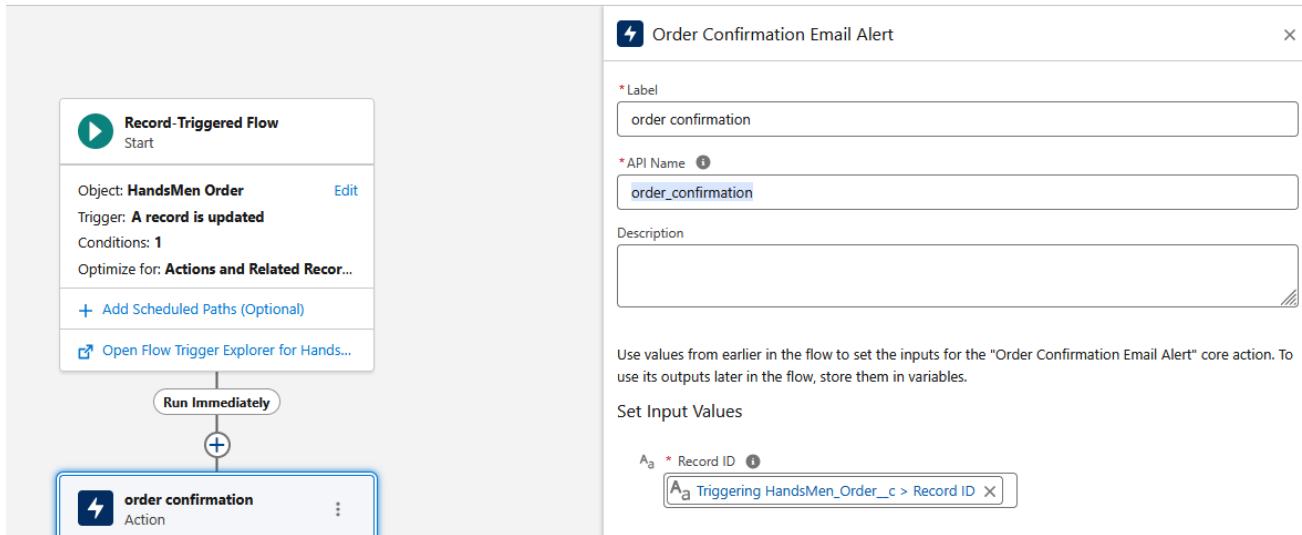
Configure the flow as follows:

- **Select Object Type**
 - Object: HandsMen Order
- **Configure Trigger**
 - **Trigger the Flow When:** A record is updated
- Set Entry Conditions
 - **Conditions Requirements:** All Conditions Are Met (AND)
 - **Field:** Status
 - **Operator:** Equals
 - **Value:** Confirmed
 - **When to Run the Flow for Updated Records:** Only when a record is updated to meet the condition requirements
- **Optimize the Flow**
 - Actions and Related Records

Then click the X button to close the configuration panel.



Under **Start** element, click the + button and add the **Order Confirmation Email Alert** element.



Configure the **Order Confirmation Email Alert** element as follows:

- **Label:** order confirmation
- **API Name:** order_confirmation
- **Description:** Optional

Set Input Values:

- **Record ID:** Triggering HandsMen_Order_c > Record ID

Then click the X button to close the configuration panel.

Save as

Save As

A New Version

* Flow Label

order confirmation

* Flow API Name ⓘ

order_confirmation

Description

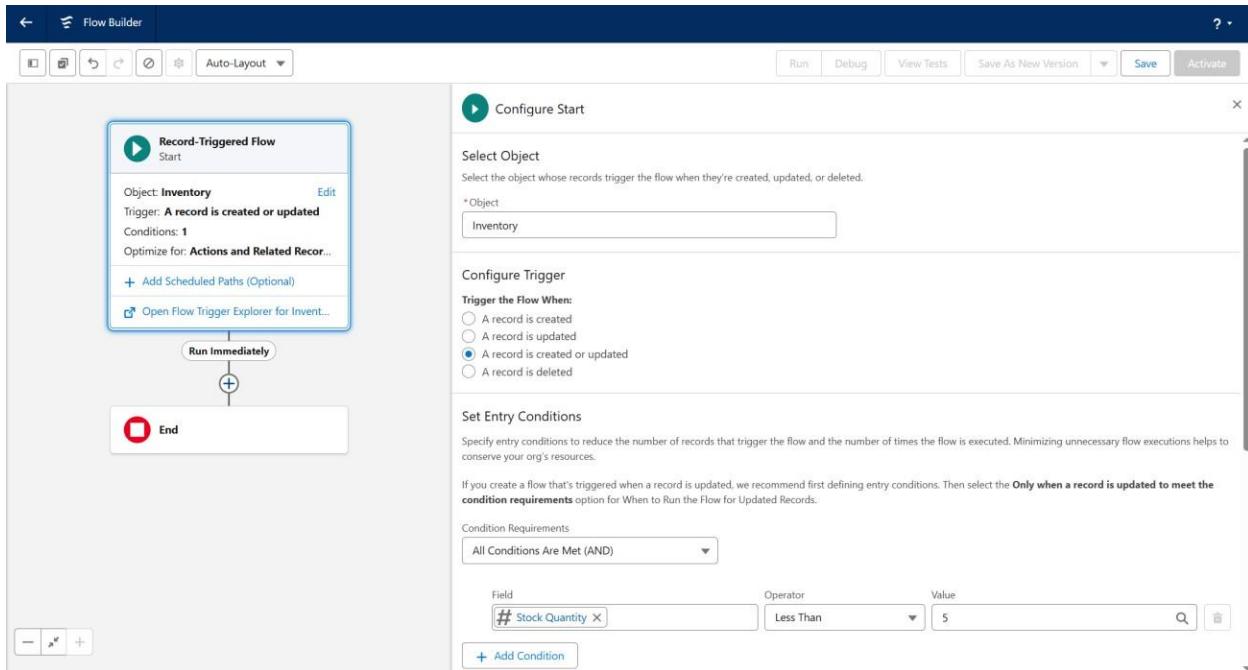
Show Advanced



Click the **Save** button and enter the following:

- **Flow Label:** order confirmation
- **Flow API Name:** order_confirmation

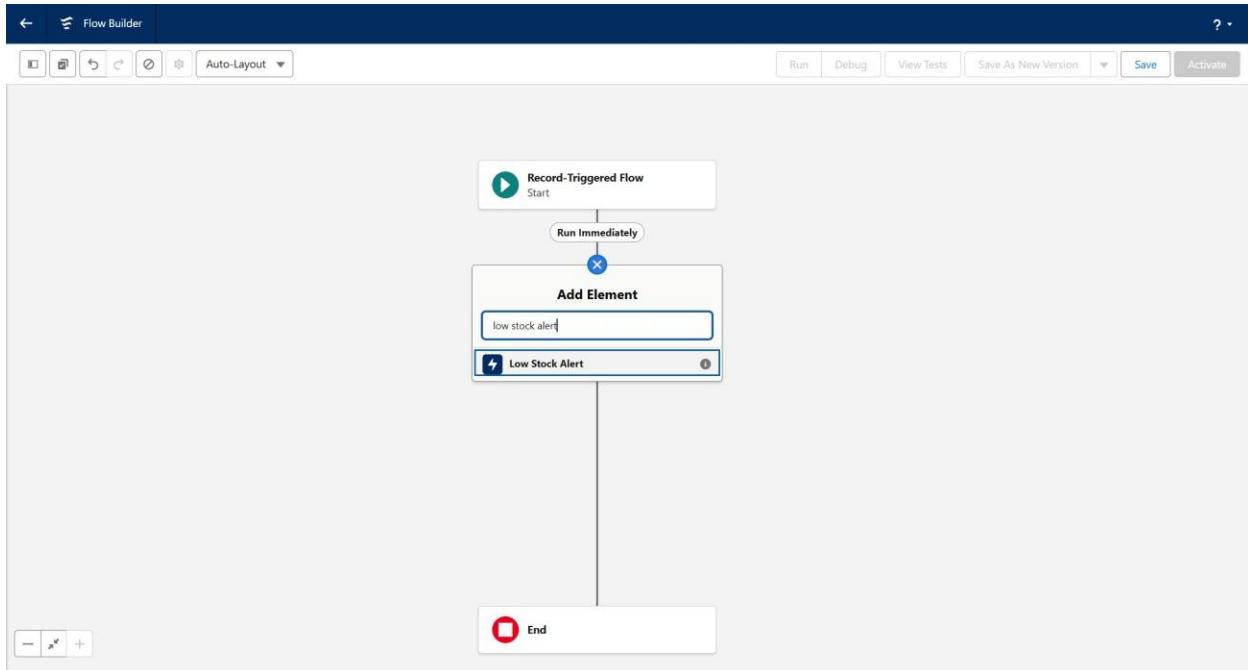
Click the **Save** button, then click **Activate** to enable the flow.



Create a new **Record-Triggered Flow** and configure it as follows:

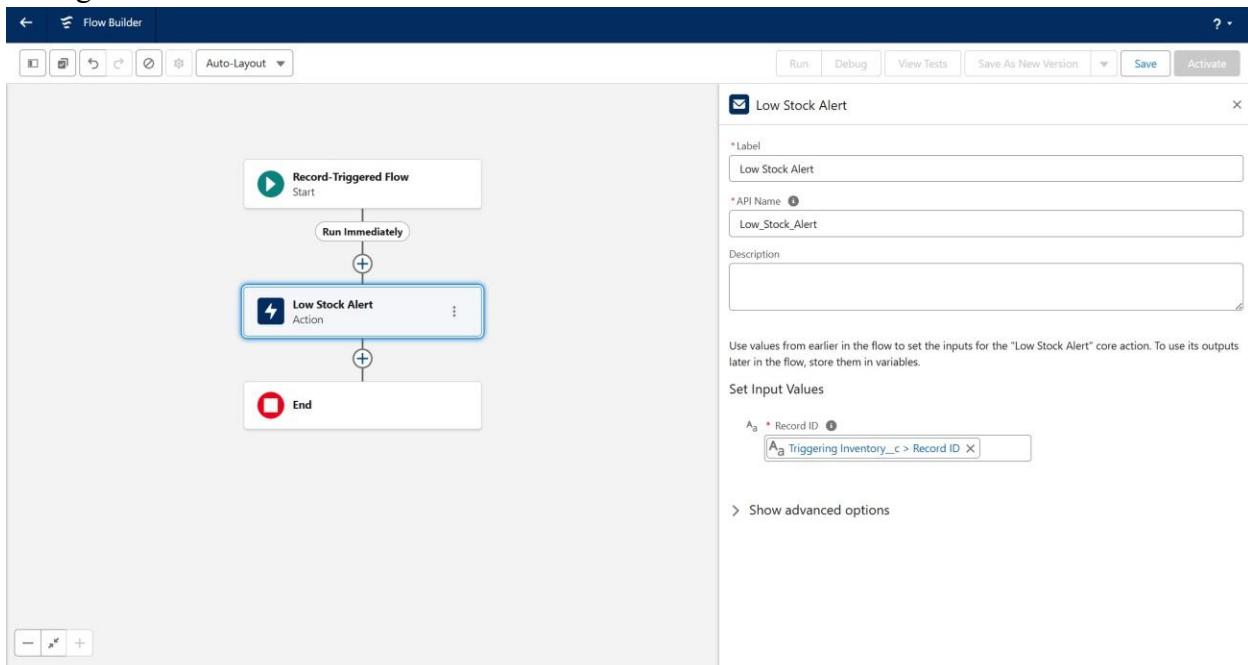
- **Select Object Type**
 - **Object:** Inventory
- **Configure Trigger**
 - **Trigger the Flow When:** A record is created or updated
- **Set Entry Conditions**
 - **Conditions Requirements:** All Conditions Are Met (AND)
 - **Field:** Stock Quantity
 - **Operator:** Less Than
 - **Value:** 5
 - **When to Run the Flow for Updated Records:** Every time a record is updated and meets the condition requirements
- **Optimize the Flow**
 - **Select:** Actions and Related Records

Then click the X button to close the configuration panel.



Under **Start** element, click the **+** button and add the **Low Stock Alert** element.

Configure the **Low Stock Alert** element as follows:



- **Label:** Low Stock Alert
- **API Name:** Low_Stock_Alert
- **Description:** Optional

Set Input Values:

- **Record ID:** Triggering Inventory > Record ID

Then click the X button to close the configuration panel.

Save as

Save As

* Flow Label

* Flow API Name (i)

Description

[Show Advanced](#)

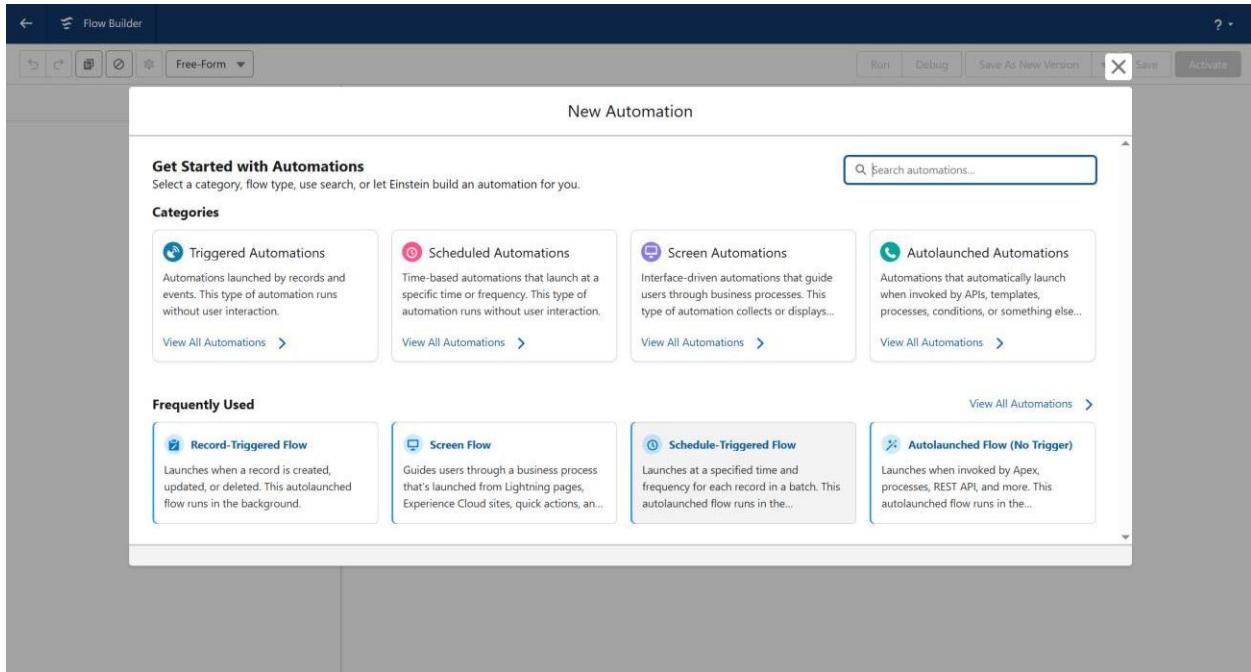
Cancel
Save

Click the **Save** button and enter the following:

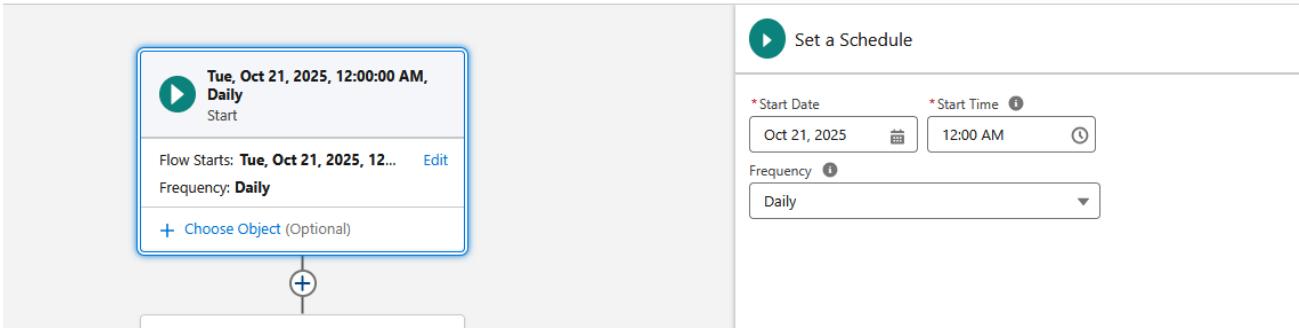
- **Flow Label:** low stock alert
- **Flow API Name:** low_stock_alert

Click the **Save** button, then click **Activate** to enable the flow.

Scheduled Flow:



In **Flow Builder**, select **Scheduled-Triggered Flow** as the flow type to begin automating processes based on a scheduled time.



In **Set a Schedule**, you can configure the timing based on your needs. Then click the **X** button to close the configuration panel.

Last saved on 10/21/2025, 12:43 AM **Active** | Run | Debug | Save As New Version | Save | Deactivate

Get Records

Label: get customers **API Name:** get_customers

Description:

Get Records of This Object:

Object: HandsMen Customer

Under **Start** element, click the + button and add the **Get Records** element.

The screenshot shows the configuration of a 'Get Records' element. It includes fields for 'Label' (set to 'get customers'), 'API Name' (set to 'get_customers'), 'Description' (empty), and 'Object' (set to 'HandsMen Customer'). Below this, there's a section for 'Filter HandsMen Customer Records' with a warning about retrieving all records if no conditions are set. The 'Condition Requirements' dropdown is set to 'None—Get All HandsMen Custom...'. Under 'Sort HandsMen Customer Records', the 'Sort Order' is set to 'Not Sorted', with a note about filtering by unique fields like ID. A 'How Many Records to Store' section shows 'All records' selected. A 'How to Store Record Data' section shows 'Automatically store all fields' selected. A 'Tips' sidebar is visible on the right.

Get Records

* Label * API Name

Description

Get Records of This Object

* Object

Filter HandsMen Customer Records

⚠ With no conditions, the flow retrieves **all** HandsMen Customer records.

Condition Requirements

Sort HandsMen Customer Records

Sort Order

⚠ If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

Only the first record
 All records, up to a specified limit
 All records

How to Store Record Data

Automatically store all fields
 Choose fields and let Salesforce do the rest
 Choose fields and assign variables (advanced)

Tips

Configure the **Get Records** element as follows:

- **Label:** get customers
- **API Name:** get_customers
- **Description:** Optional

Get Records of This Object:

- **Object:** HandsMen Customer

Filter HandsMen Customer Records:

- **Condition Requirements:** None – Get All HandsMen Customer Records

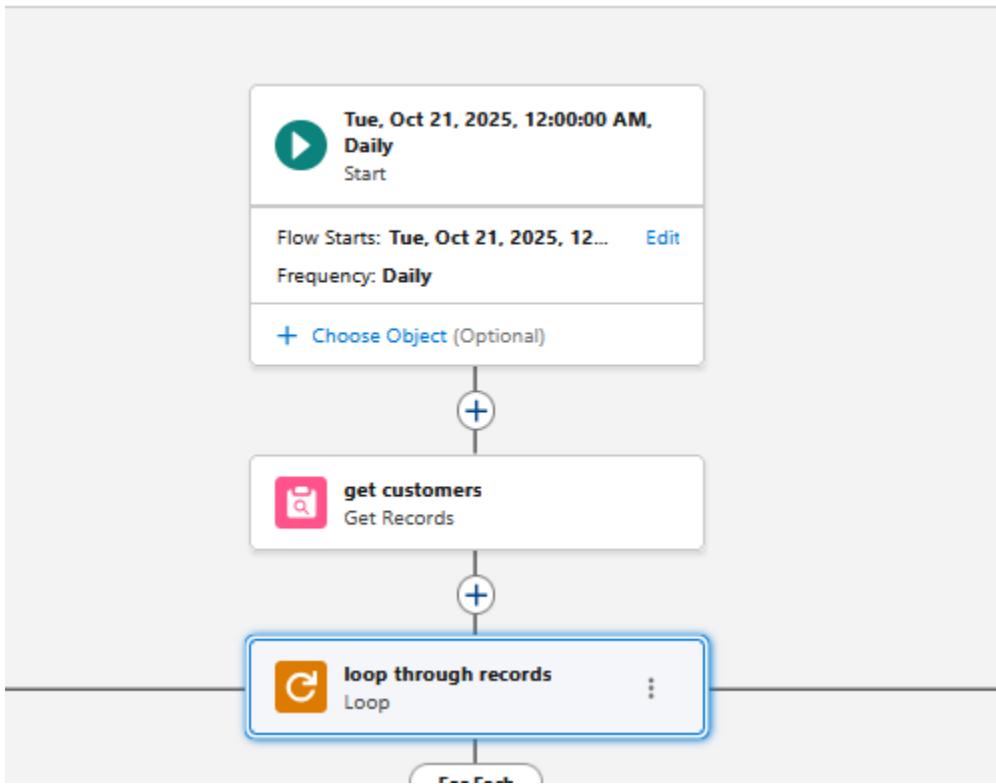
Sort HandsMen Customer Records:

- **Sort Order:** Not Sorted

How Many Records to Store: All Records

How to Store Record Data: Automatically store all fields Then

click the X button to close the configuration panel.



Under **Get Records** element, click the + button and add the **Loop** element.



Loop



*Label

loop through records

*API Name

loop_through_records

Description

Start a loop path for iterating over items in a collection variable. For each iteration, the flow temporarily stores the item in the loop variable.

Select Collection Variable

* Collection Variable

HandsMen Customer from get customers

Specify Direction for Iterating Over Collection

* Direction

- First item to last item
 Last item to first item

To use the current item in other elements in the loop, use the API name of the Loop element.

Example: if your flow iterates over accounts with a Loop element named "My_Account_Loop" you can reference the current item from that loop element. Just start typing "My_Account_Loop" and select "Current Item from Loop My_Account_Loop".

Configure the **Loop** element as follows:

- **Label:** loop through records
- **API Name:** loop_through_records
- **Description:** Optional

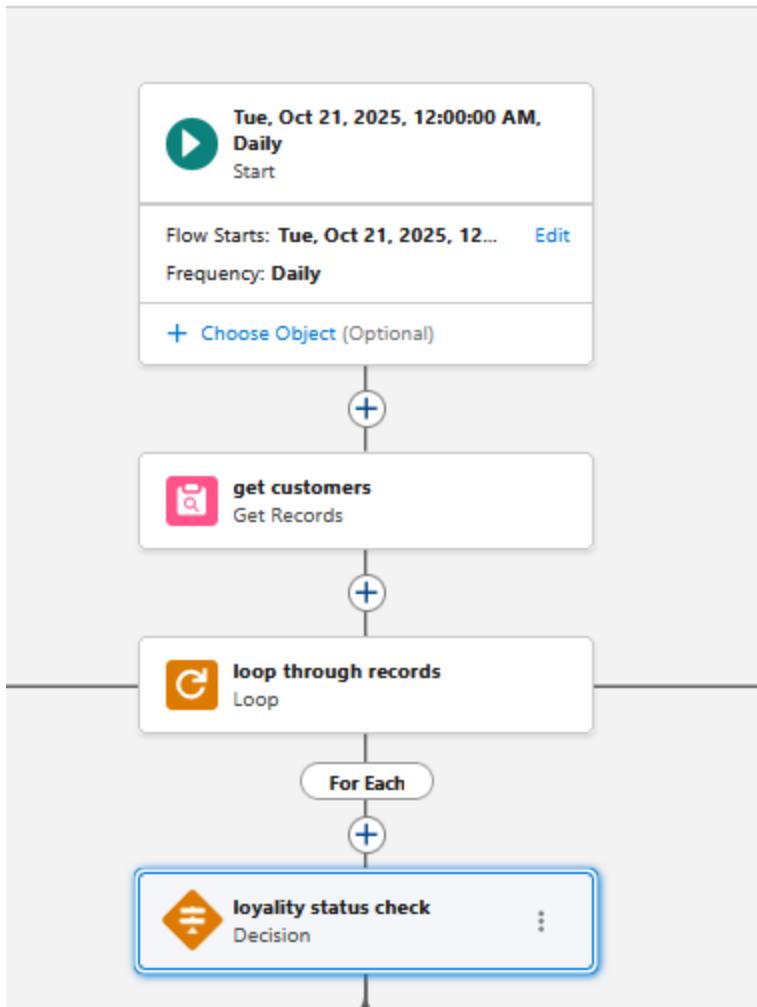
Select Collection Variable:

- **Collection Variable:** HandsMen Customer from Get Customers

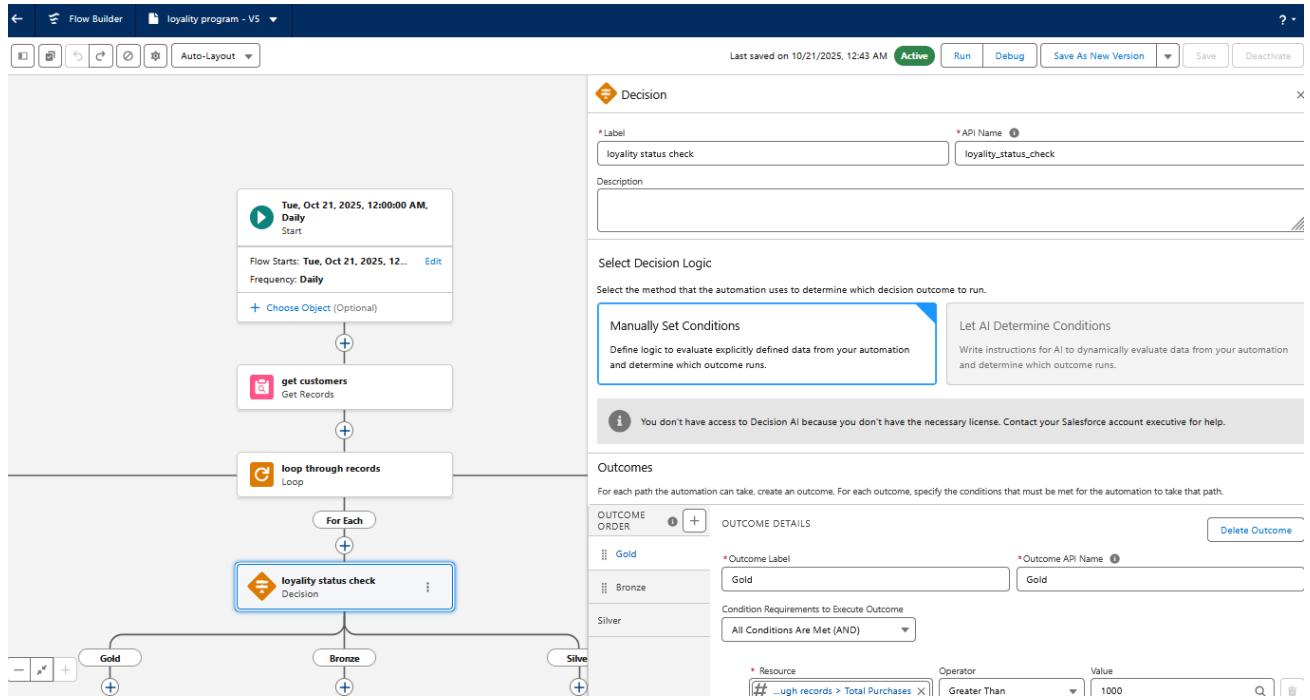
Specify Direction for Iterating Over Collection:

- **Direction:** First item to last item

Then click the X button to close the configuration panel.



Under **Loop (For Each)** element, click the + button and add the **Decision** element.



Created By: Antonio Miguel Orias

Configure the **Decision** element as follows:

- **Label:** loyalty status check
- **API Name:** loyalty_status_check
- **Description:** Optional

Select Decision Logic: Manually Set Conditions

Outcome:

- **Outcome Label:** Gold
- **Outcome API Name:** Gold
- **Condition Requirements to Execute Outcome:** All Conditions Are Met (AND)
- **Resources:** Current Item from Loop Loop Through Records > Total Purchases
- **Operator:** Greater Than
- **Value:** 1000

Outcomes

For each path the automation can take, create an outcome. For each outcome, specify the conditions that must be met for the automation to take that path.

OUTCOME ORDER	OUTCOME DETAILS	Actions
Gold	* Outcome Label: Gold * Outcome API Name: Gold	Delete Outcome
Bronze		
Silver	Condition Requirements to Execute Outcome: All Conditions Are Met (AND)	
	* Resource: # ...ugh records > Total Purchases Operator: Greater Than Value: 1000	

Add Condition

Add another outcome:

- **Outcome Label:** Bronze
- **Outcome API Name:** Bronze
- **Condition Requirements to Execute Outcome:** All Conditions Are Met (AND)
- **Resources:** Current Item from Loop Loop Through Records > Total Purchases
- **Operator:** Less Than or Equal
- **Value:** 500

Outcomes

For each path the automation can take, create an outcome. For each outcome, specify the conditions that must be met for the automation to take that path.

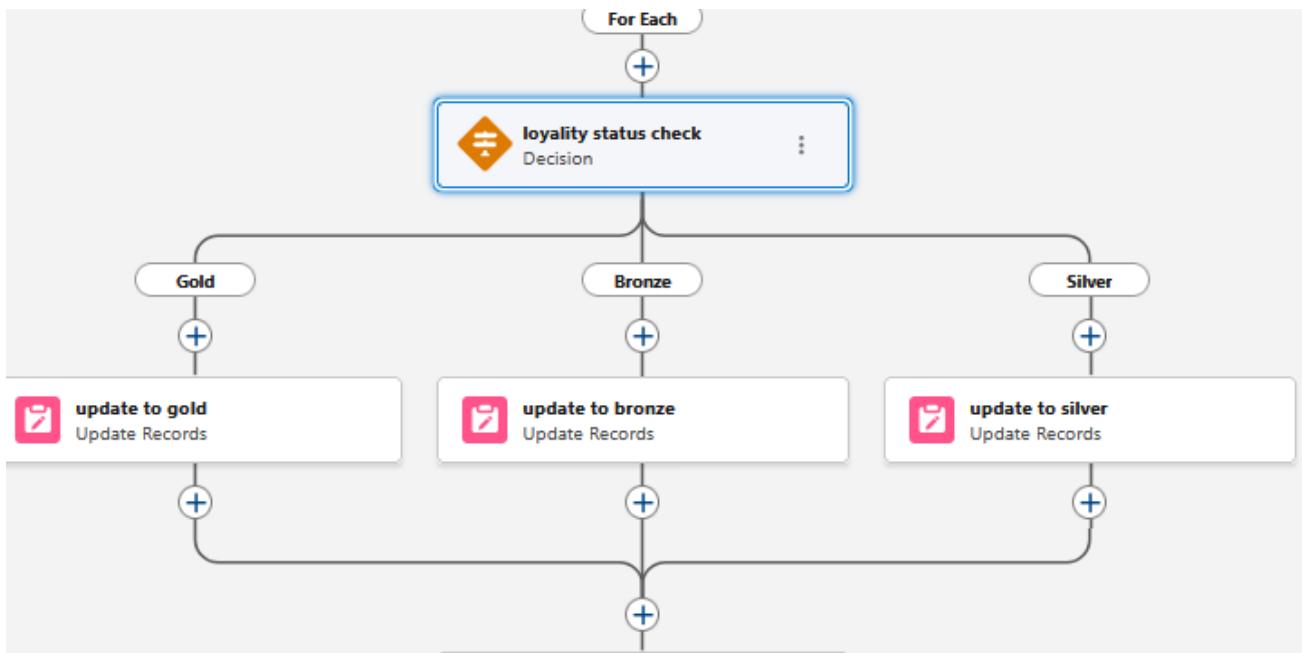
OUTCOME ORDER [i] [+]

OUTCOME DETAILS

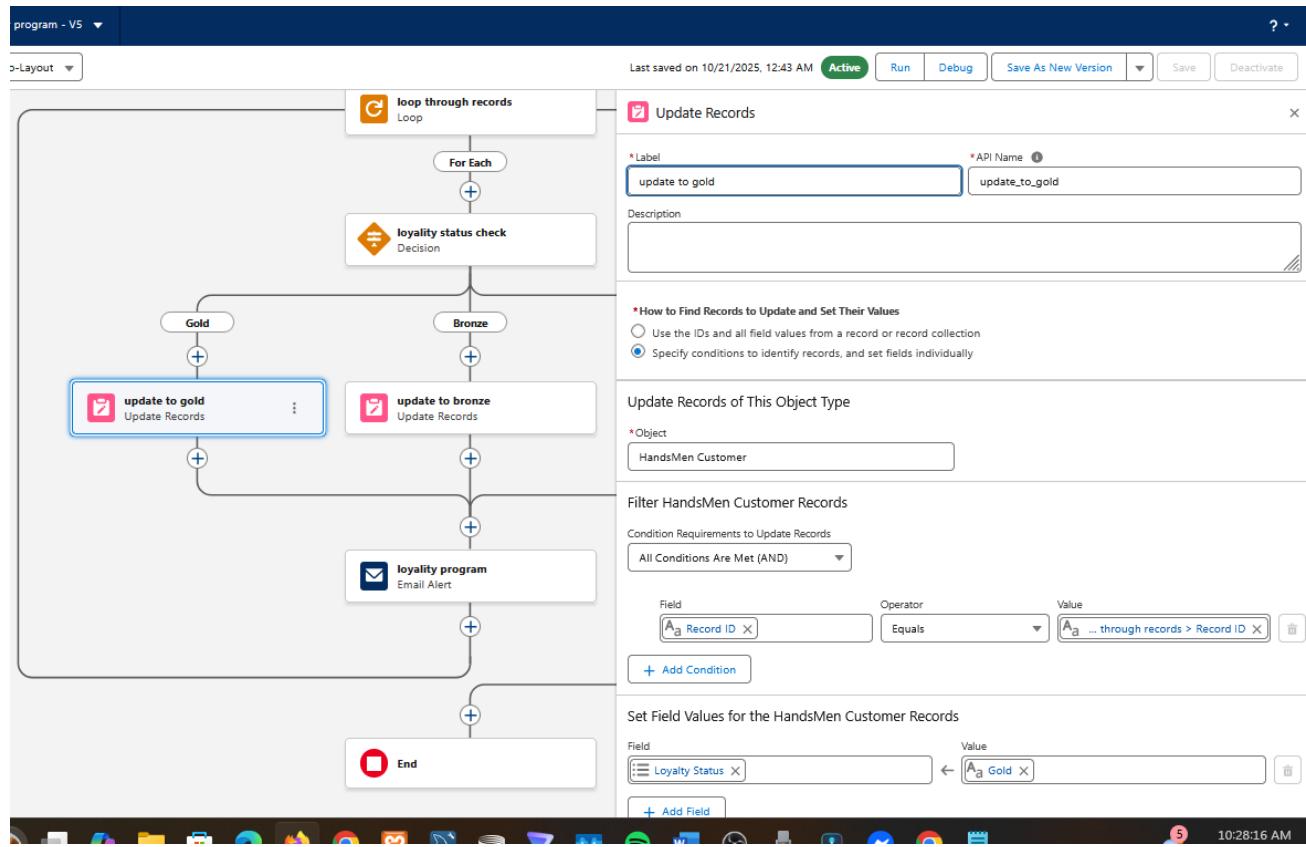
[Delete Outcome]

Gold	* Outcome Label: <input type="text" value="Bronze"/>	* Outcome API Name: <input type="text" value="Bronze"/>
Bronze	Condition Requirements to Execute Outcome: <input type="button" value="All Conditions Are Met (AND)"/>	
Silver	* Resource: <input type="text" value="# ...ugh records > Total Purchases"/> X	Operator: <input type="button" value="Less Than or Equal"/>
	Value: <input type="text" value="500"/> [Search] [Delete]	[+ Add Condition]

Set the **Default Outcome** to Silver. Then click the X button to close the panel.



Under **Decision (Gold)** element, click the + button and add the **Update Records** element.



Configure the **Update Records** element as follows:

- **Label:** update to gold

- **API Name:** update_to_gold
- **Description:** Optional

How to Find Records to Update and Set Ther Values: Specify conditions to identify records, and set fields individually

Update Records of This Object Type:

- **Object:** HandsMen Customer

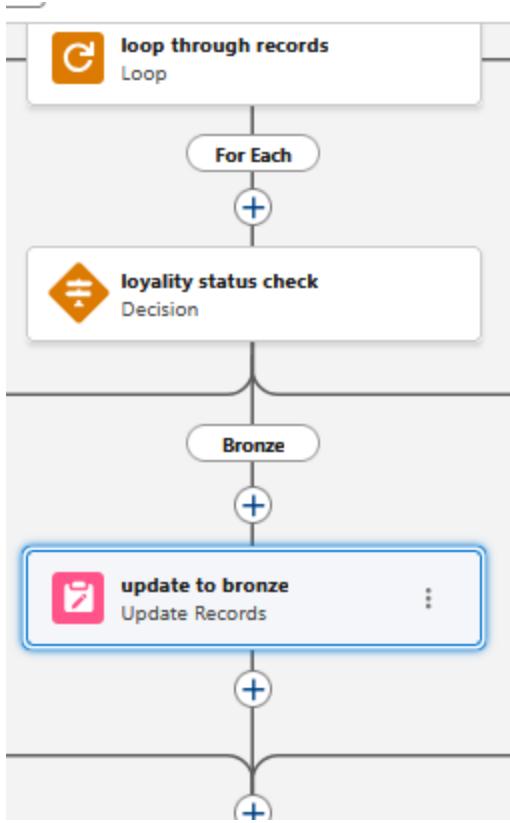
Filter HandsMen Customer Records:

- **Conditions Requirements to Update Records:** All Conditions Are Met (AND)
- **Field:** Records ID
- **Operator:** Equals
- **Value:** Current Item from Loop Loop Through Records > Record ID

Set Field Value for the HandsMen Customer Records:

- **Field:** Loyalty Status
- **Value:** Gold

Then click the X button to close the configuration panel.



Under **Decision (Bronze)** element, click the + button and add the **Update Records** element.

Update Records

X

*Label

update to bronze

*API Name 

update_to_bronze

Description

*How to Find Records to Update and Set Their Values

- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Update Records of This Object Type

*Object

HandsMen Customer

Filter HandsMen Customer Records

Condition Requirements to Update Records

All Conditions Are Met (AND) 

Field

Aa Record ID 

Operator

Equals 

Value

Aa ... through records > Record ID 



 Add Condition

Set Field Values for the HandsMen Customer Records

Field

Loyalty Status 

Value

Aa Bronze 



 Add Field

Configure the **Update Records** element as follows:

- **Label:** update to bronze
- **API Name:** update_to_bronze
- **Description:** Optional

How to Find Records to Update and Set Their Values: Specify conditions to identify records, and set fields individually

Update Records of This Object Type:

- **Object:** HandsMen Customer

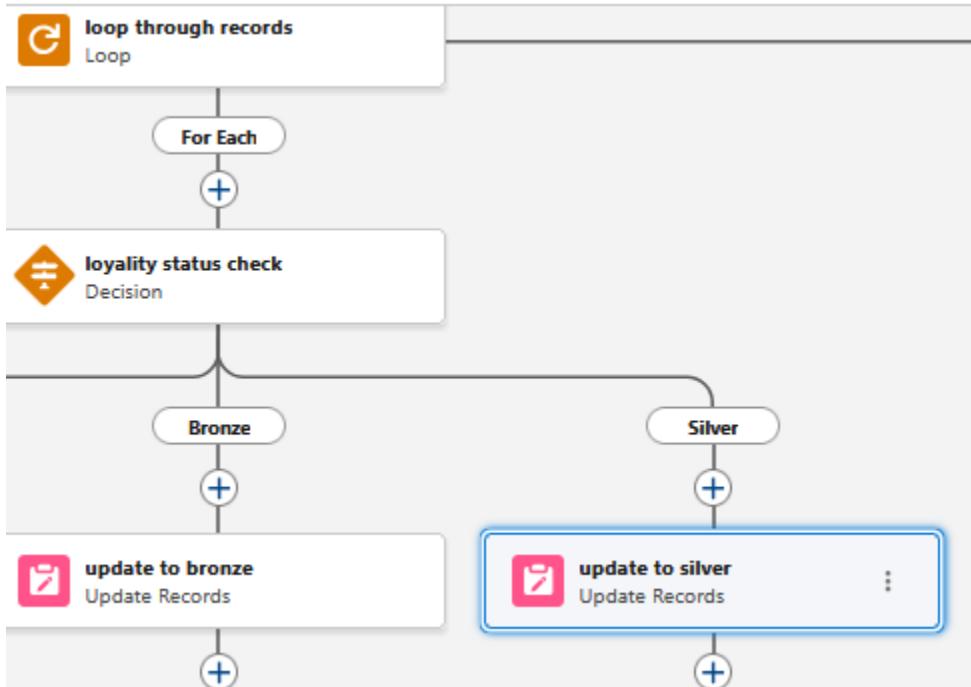
Filter HandsMen Customer Records:

- **Conditions Requirements to Update Records:** All Conditions Are Met (AND)
- **Field:** Records ID
- **Operator:** Equals
- **Value:** Current Item from Loop Loop Through Records > Record ID

Set Field Value for the HandsMen Customer Records:

- **Field:** Loyalty Status
- **Value:** Bronze

Then click the X button to close the configuration panel.



Under **Decision (Silver)** element, click the + button and add the **Update Records** element.

Update Records

*Label: update to silver *API Name: update_to_silver

Description:

*How to Find Records to Update and Set Their Values

- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Update Records of This Object Type

*Object: HandsMen Customer

Filter HandsMen Customer Records

Condition Requirements to Update Records

All Conditions Are Met (AND)

Field	Operator	Value
Aa Record ID X	Equals	Aa ... through records > Record ID X

+ Add Condition

Set Field Values for the HandsMen Customer Records

Field	Value
Loyalty Status X	Aa Silver X

Configure the **Update Records** element as follows:

- **Label:** update to silver

- **API Name:** update_to_silver
- **Description:** Optional

How to Find Records to Update and Set Their Values: Specify conditions to identify records, and set fields individually

Update Records of This Object Type:

- **Object:** HandsMen Customer

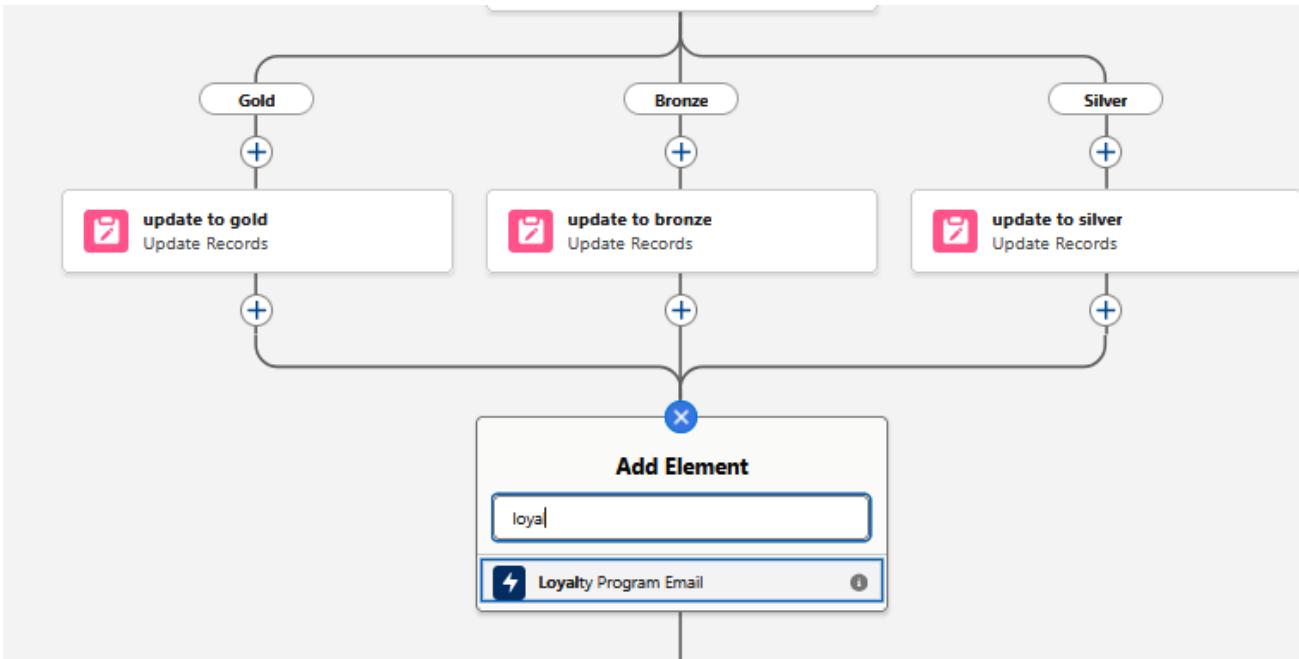
Filter HandsMen Customer Records:

- **Conditions Requirements to Update Records:** All Conditions Are Met (AND)
- **Field:** Records ID
- **Operator:** Equals
- **Value:** Current Item from Loop Loop Through Records > Record ID

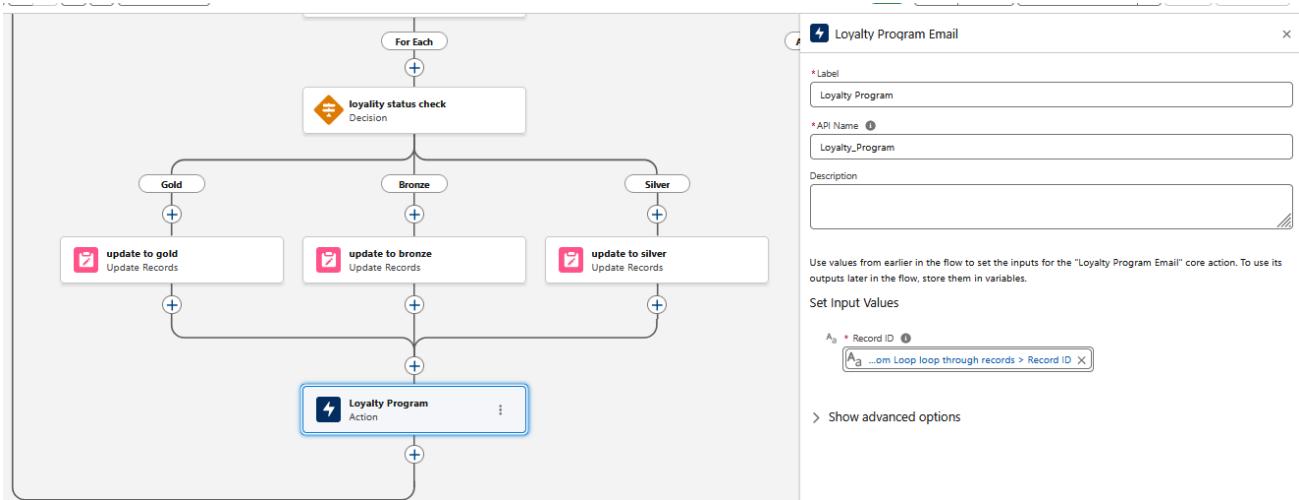
Set Field Value for the HandsMen Customer Records:

- **Field:** Loyalty Status
- **Value:** Silver

Then click the X button to close the configuration panel.



Under **Decision** element, click the + button and add the **Loyalty Program Email** element.



Configure the **Loyalty Program Email** element as follows:

- **Label:** Loyalty Program
- **API Name:** Loyalty_Program
- **Description:** Optional

Set Input Values:

- **Record ID:** Current Item from Loop Loop Through Records > Record ID

Then click the X button to close the configuration panel.

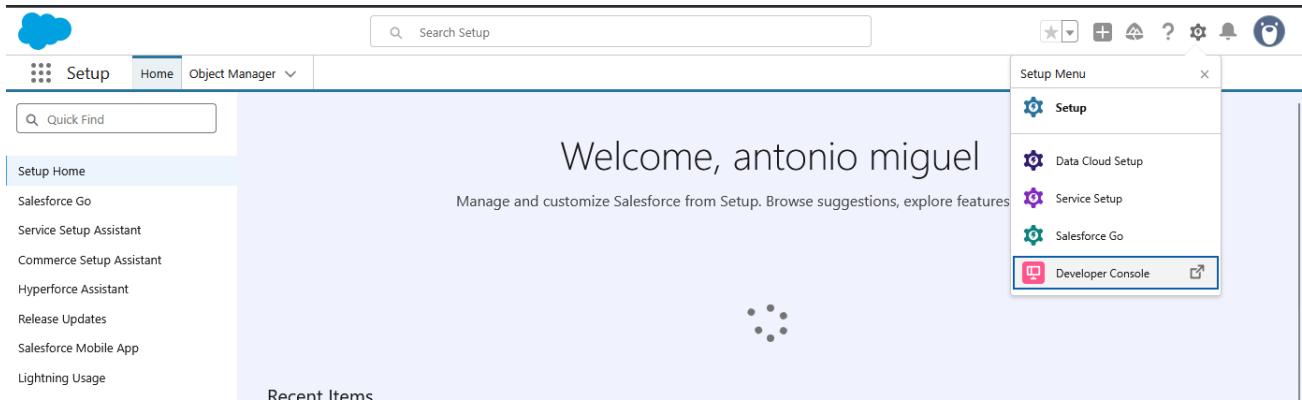
The screenshot shows a 'Save as' dialog box. At the top, it says 'Save as'. Below that, there's a 'Save As' dropdown menu showing 'A New Version'. The main area contains two required fields: 'Flow Label' (containing 'loyalty program') and 'Flow API Name' (containing 'loyalty_program'). There is also a 'Description' field which is empty. At the bottom right, there are 'Cancel' and 'Save' buttons.

Click the **Save** button and enter the following:

- **Flow Label:** loyalty program
- **Flow API Name:** loyalty_program

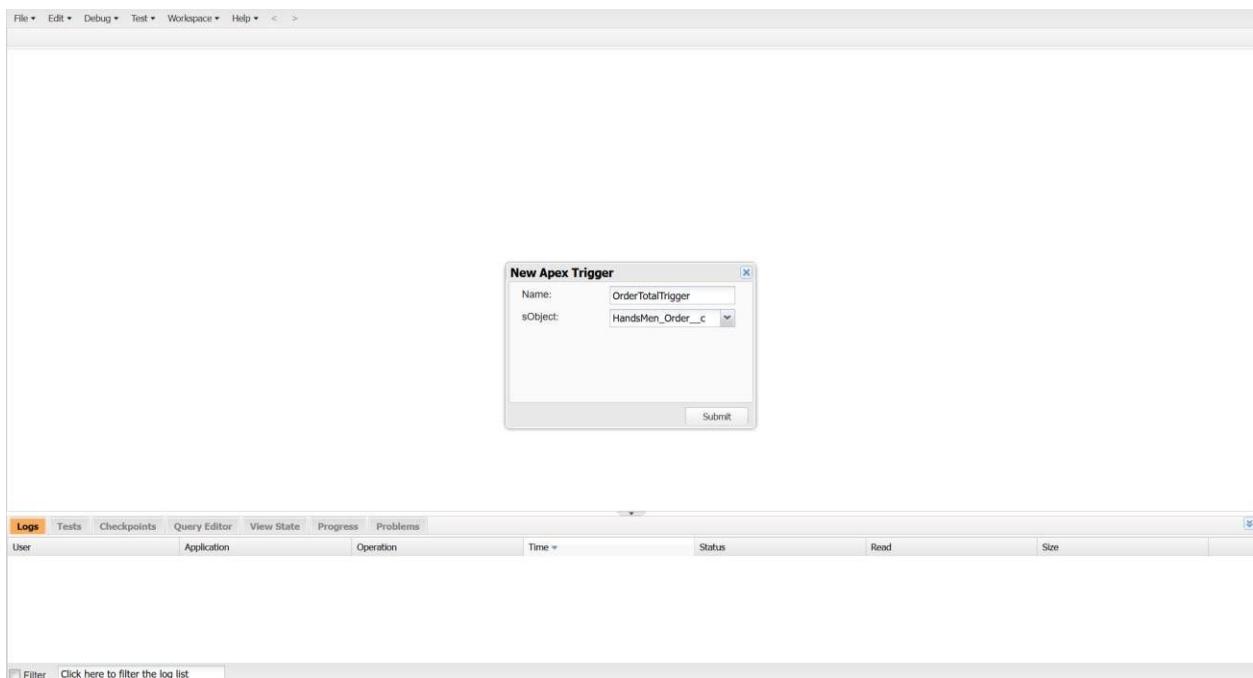
Click the **Save** button, then click **Activate** to enable the flow.

Automation using Apex



In the **Home** tab, click the **Setup** icon, then select **Developer Console**.

- **Order Total Trigger:**



In **Developer Console**, follow these steps:

1. Click **File > New > Apex Trigger**
2. In the dialog box, enter:
 - **Name:** OrderTotalTrigger

- **sObject:** HandsMen_Order_c

Click **Submit** to create the trigger.

```

trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
    Set<Id> productIds = new Set<Id>();

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }

    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
    );

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
            if (order.Quantity__c != null) {
                order.Total_Amount__c = order.Quantity__c * product.Price__c;
            }
        }
    }
}

```

-

OrderTotalTrigger.apxt (CODE): After Adding the code save it and run.

```

trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
    Set<Id> productIds = new Set<Id>();

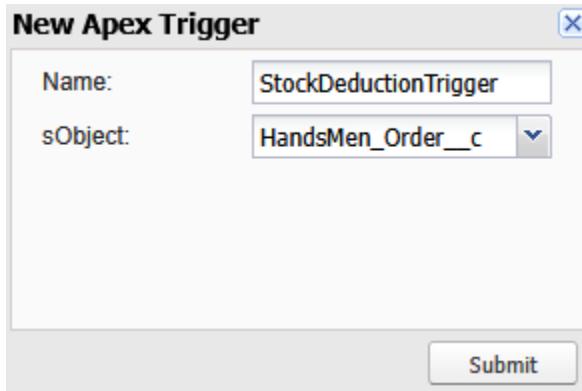
    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }

    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
    );

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c))
    }
}

```

```
    HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
    if(order.Quantity__c != null) {
        order.Total_Amount__c = order.Quantity__c * product.Price__c;
    }
}
}
}
}
```



To create a new Apex Trigger in **Developer Console**, follow these steps:

1. Click **File > New > Apex Trigger**
2. In the dialog box, enter:
 - o **Name:** StockDeductionTrigger
 - o **sObject:** HandsMen_Order__c

Click **Submit** to create the trigger.

```

Code Coverage: None ▾
1 trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    if (productIds.isEmpty()) return;
11
12    // Query related inventories based on product
13    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
14        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
15         FROM Inventory__c
16         WHERE HandsMen_Product__c IN :productIds]
17    );
18
19    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
20
21    for (HandsMen_Order__c order : Trigger.new) {

```

StockDeductionTrigger.apxt (CODE): After Adding the code save it and run.

```

trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
    Set<Id> productIds = new Set<Id>();

    for (HandsMen_Order__c order : Trigger.new) {

```

```

        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }

    if (productIds.isEmpty()) return;

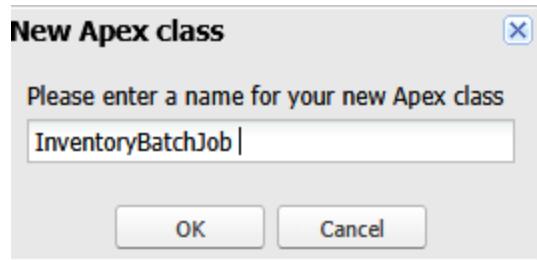
    // Query related inventories based on product
    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
         FROM Inventory__c
         WHERE HandsMen_Product__c IN :productIds]
    );
}

List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();

for (HandsMen_Order__c order : Trigger.new) {
    if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
        for (Inventory__c inv : inventoryMap.values()) {
            if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
                inv.Stock_Quantity__c -= order.Quantity__c;
                inventoriesToUpdate.add(inv);
                break;
            }
        }
    }
}

if (!inventoriesToUpdate.isEmpty()) {
    update inventoriesToUpdate;
}
}

```



In **Developer Console**, follow these steps:

1. Click **File > New > Apex Class**
2. In the dialog box, enter:
 - o **Name:** InventoryBatchJob

Click **Ok** to create the class.

```

1  global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {
2
3  global Database.QueryLocator start(Database.BatchableContext BC) {
4
5    return Database.getQueryLocator(
6      'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 5'
7    );
8
9  }
10
11 }
12
13 global void execute(Database.BatchableContext BC, List<SObject> records) {
14
15   List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
16
17   // Cast SObject list to Product__c list
18
19   for (SObject record : records) {
20
21     HandsMen_Product__c product = (HandsMen_Product__c) record;

```

InventoryBatchJob.apxc (CODE): After Adding the code save it and run.

```

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 < 5'

};

}

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);

}

}
```

Enter Apex Code

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

In **Developer Console**, follow these steps:

1. Click **Debug > Open Execute Anonymous Window**

2. In the window that appears, paste the following code:

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

Click **Execute** to schedule the batch job.

Testing

HandsMen Customer:

The screenshot shows the 'New HandsMen Customer' form within a software application. The top navigation bar includes 'HandsMen Threads', 'HandsMen Customer', 'HandsMen Orders', 'HandsMen Products', 'Inventory', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Actions', and 'Contacts'. A search bar and various icons are also present. The main window title is 'New HandsMen Customer'. It features a toolbar with 'New', 'Import', 'Change Owner', and 'Assign Label' buttons. Below the toolbar is a list view with a single item. The form itself has a section titled 'Information' containing fields for 'HandsMen Customer Name' (with a red asterisk indicating it's required), 'Email', 'Phone', 'Loyalty Status' (a dropdown menu with '--None--'), 'FirstName', 'LastName', and 'Total Purchases'. An 'Owner' field shows 'antonio miguel orias'. At the bottom are 'Cancel', 'Save & New', and a blue 'Save' button.

Check if the fields **HandsMen Customer Name**, **Email**, **Phone**, **Loyalty Status**, **FirstName**, **LastName**, and **Total Purchases** are displayed when adding a customer.

HandsMen Threads

HandsMen Customer | HandsMen Orders | HandsMen Products | Inventory | Marketing Campaigns | Reports | Dashboards | Accounts | Contacts

HandsMen Customer
Roxy

Related Details

HandsMen Customer Name: Roxy

Email: miguel.orias02@gmail.com

Phone:

Loyalty Status: Gold

FirstName: Roxy

Lastname: Migurdia

FullName: Roxy Migurdia

Total Purchases: 300

Created By: antonio miguel orias, 10/20/2025, 7:50 PM

Owner: antonio miguel orias

Last Modified By: antonio miguel orias, 10/20/2025, 7:50 PM

Test if the **FullName** field correctly combines the values from the **FirstName** and **LastName** fields.

HandsMen Customer
Roxy

Related Details

HandsMen Customer Name: Roxy

Email: miguel.orias02@gmail.com

Phone:

Loyalty Status: Bronze

FirstName: Roxy

Lastname: Migurdia

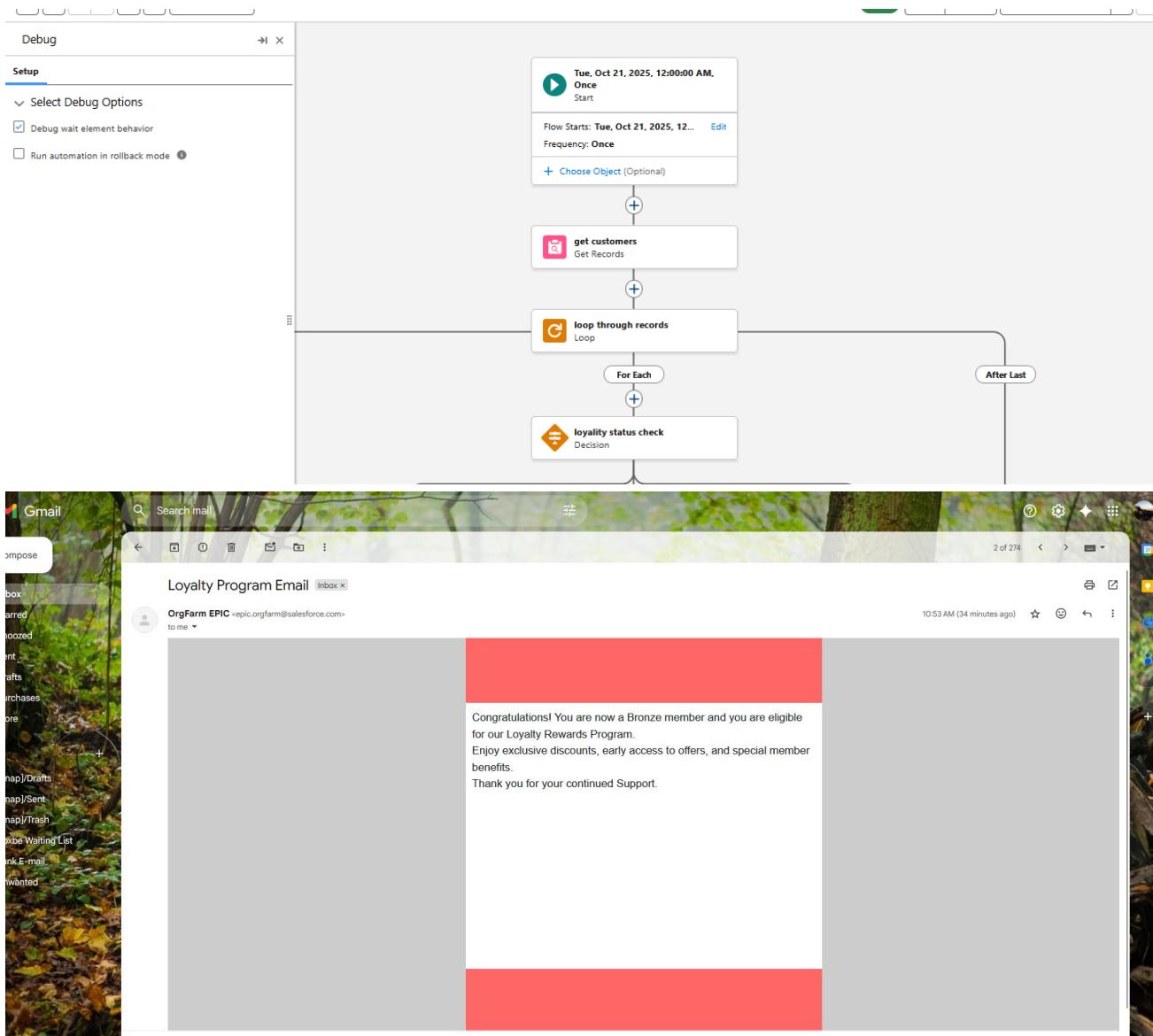
FullName: Roxy Migurdia

Total Purchases: 300

Created By: antonio miguel orias, 10/20/2025, 7:50 PM

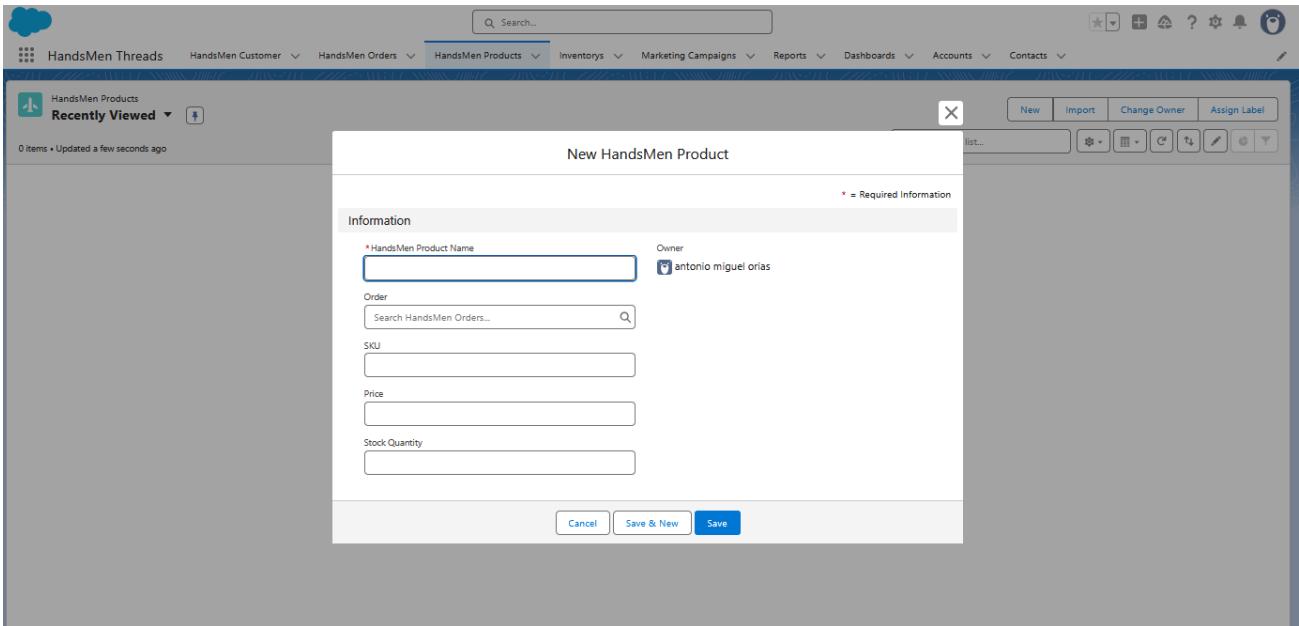
Owner: antonio miguel orias

Last Modified By: antonio miguel orias, 10/20/2025, 8:30 PM



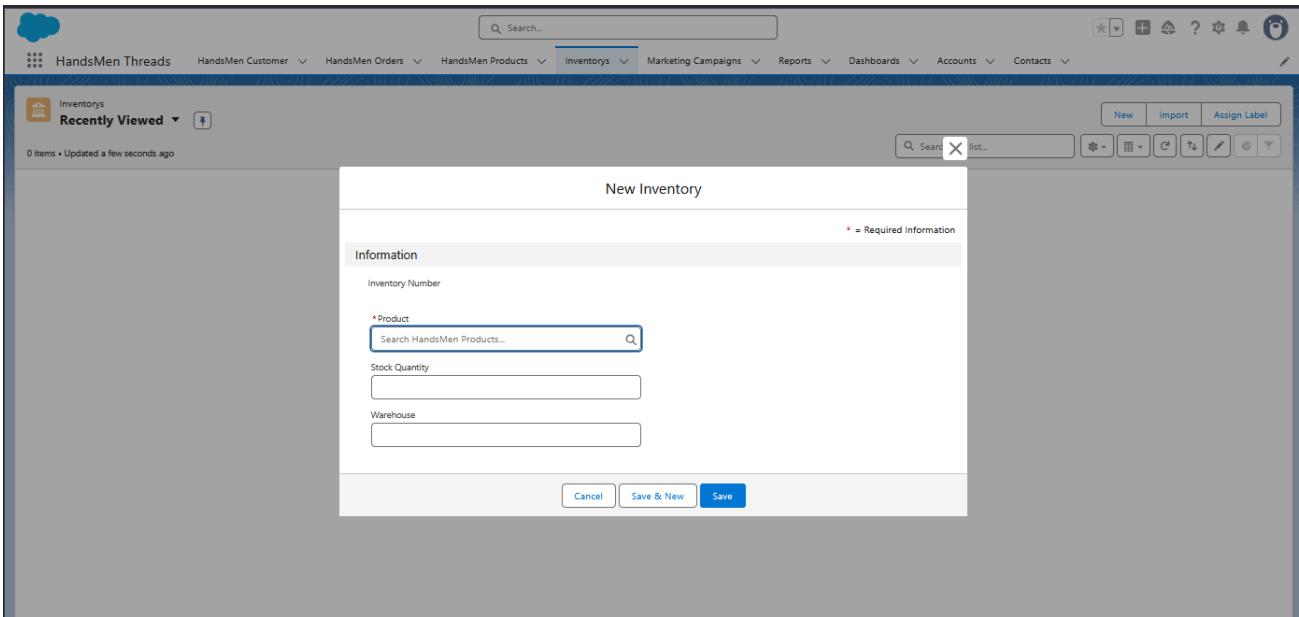
Test if the **Loyalty Status** is changing based on **Total Purchases** and check if you received the email notification. Use debug in Loyalty Program flow.

HandsMen Product:



Check if the fields **HandsMen Product Name**, **Order**, **SKU**, **Price**, **Stock Quantity** are displayed when adding a product.

Inventory:



Check if the fields **Product**, **Stock Quantity**, and **Warehouse** are displayed when adding an Inventory.

The screenshot shows a Salesforce page for an inventory item. The top navigation bar includes links for HandsMen Threads, HandsMen Customer, HandsMen Orders, HandsMen Products, Inventories, Marketing Campaigns, Reports, Dashboards, Accounts, and Contacts. The main content area displays a record for 'Inventory I-0003'. The 'Details' tab is selected. The record contains the following fields:

- Inventory Number: I-0003
- Product: HairGel
- Stock Quantity: 10
- Stock Status: Low Stock
- Warehouse: Canada

Below the form, it shows 'Created By' information: antonio miguel orias, 10/20/2025, 7:58 PM. It also shows 'Last Modified By' information: antonio miguel orias, 10/20/2025, 8:00 PM.



antonio miguel orias via am6iuckacvii.gl-diodzua1.can98.bnc.salesforce.com
to epic.orgfarm@salesforce.com, me ▾

Dear Inventory Manager,

This is to inform you that the stock for the following product is running low:

Product Name: HairGel

Current Stock Quantity: 3

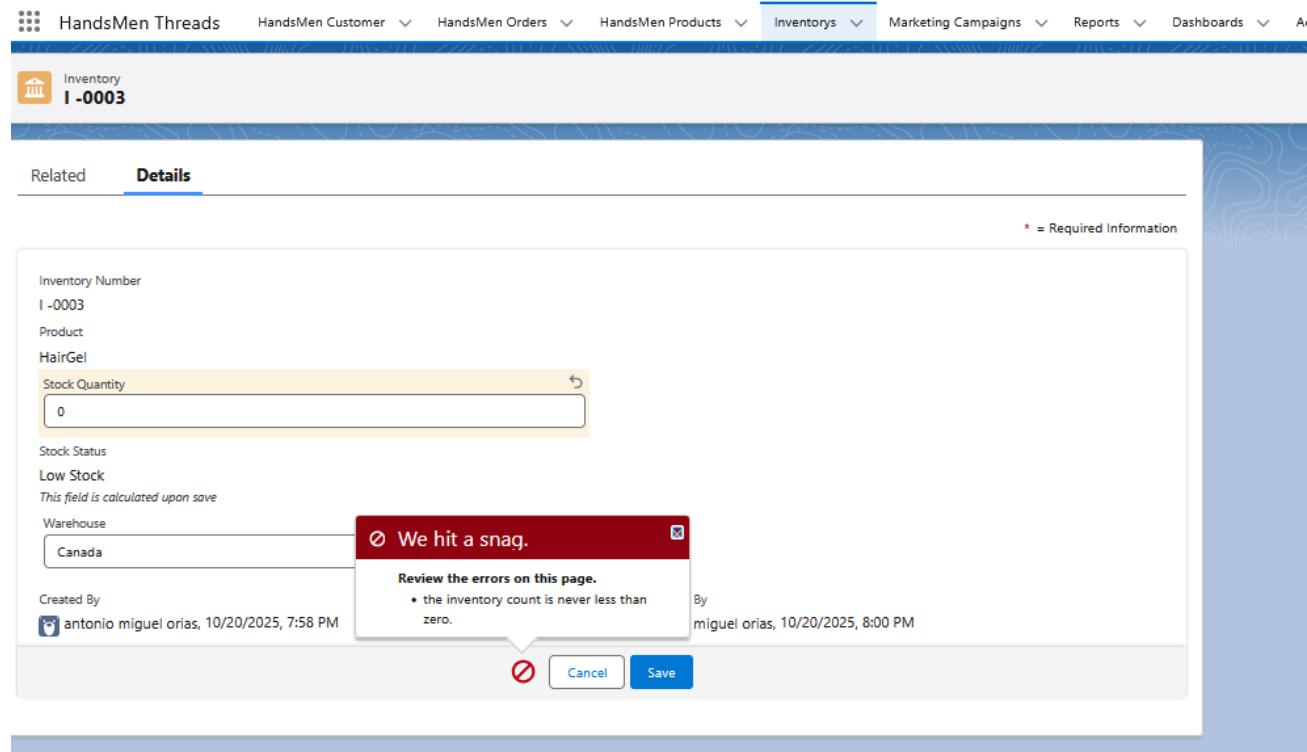
Please take the necessary steps to restock this item immediately.

Best Regards,

Inventory Monitoring System

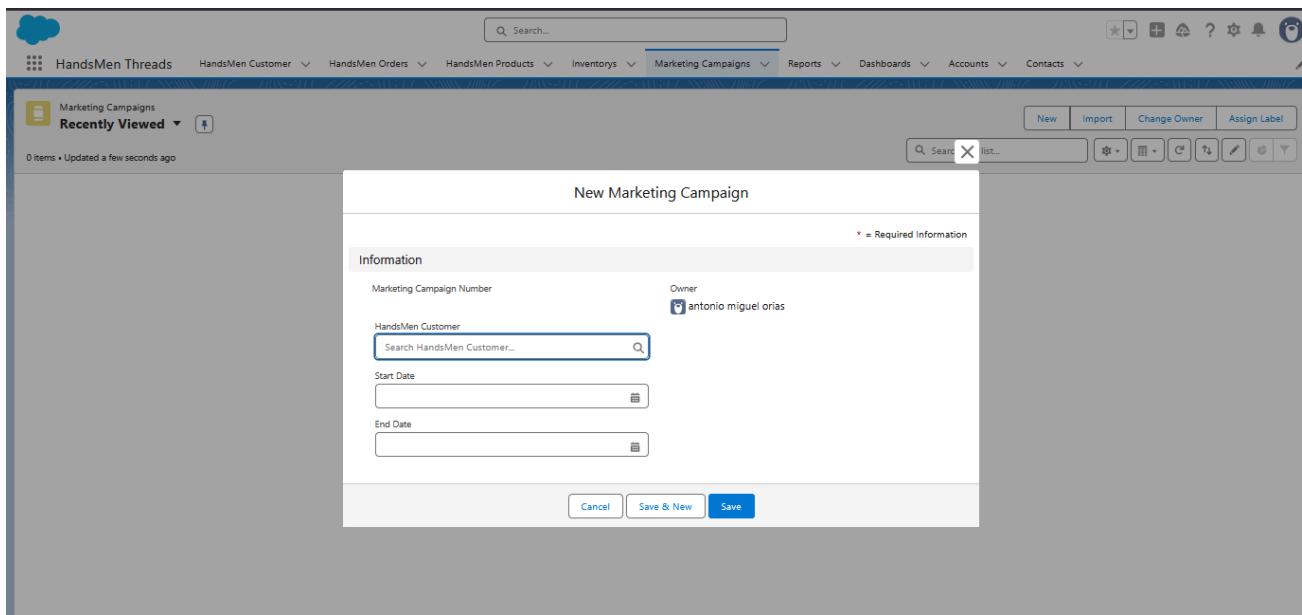
Test if the **Stock Quantity** updates when an order is confirmed, and verify that if the **Stock Quantity** is less than or equal to 10, the **Stock Status** field correctly displays either **Low**

Stock or Available. Also, check if you received the **Low Stock Alert** email when the **Stock Quantity** drops below 5.



Test if you receive an error message when the **Stock Quantity** is set to **0**. This should trigger the validation rule in the **Inventory** object and display the message: "**The inventory count is never less than zero.**"

Marketing Campaign:

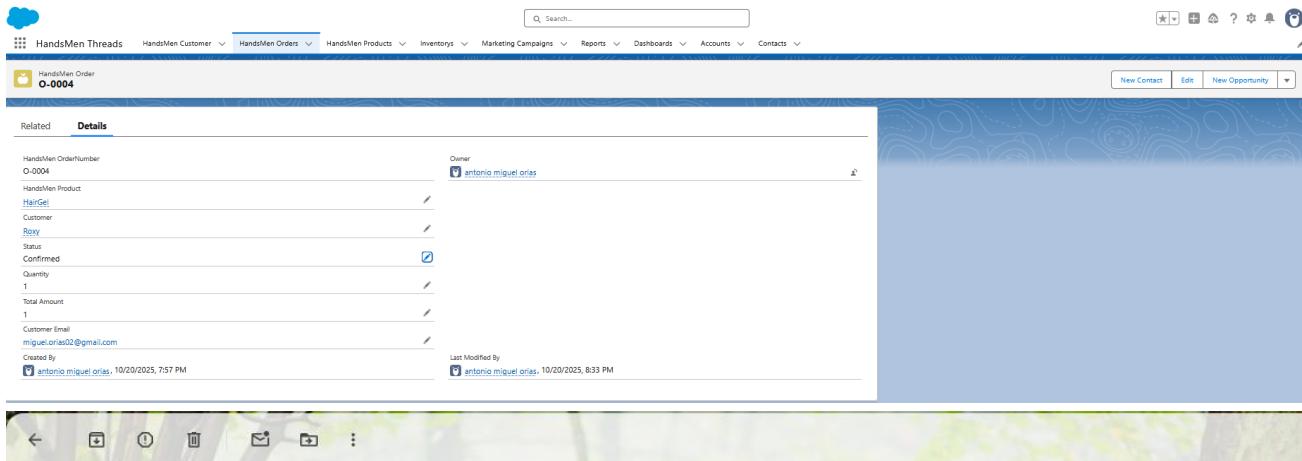


Check if the fields **HandsMen Customer**, **Start Date**, and **End Date** are displayed when adding a Marketing Campaign.

HandsMen Order:

The screenshot shows the 'New HandsMen Order' form within the HandsMen Threads application. The top navigation bar includes 'HandsMen Threads', 'HandsMen Customer', 'HandsMen Orders', 'HandsMen Products', 'Inventory', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. A search bar and various tool icons are also present. On the left, a sidebar titled 'Recently Viewed' shows a single item: 'HandsMen OrderNumber O-0004'. The main form has a title 'New HandsMen Order' and a note '* = Required Information'. It contains several input fields: 'HandsMen OrderNumber' (with a note '*'), 'Owner' (set to 'antonio miguel orias'), 'HandsMen Product' (with a search bar), 'Customer' (with a search bar), 'Status' (dropdown menu with 'None' selected), 'Quantity' (input field), 'Total Amount' (input field), and 'Customer Email' (input field with a red asterisk). At the bottom are buttons for 'Cancel', 'Save & New', and a blue 'Save' button.

Check if the fields **Customer**, **Status**, **Quantity**, **Total Amount**, **Customer Email** and **HandsMen Product** are displayed when adding an order.



Your Order has been Confirmed! Inbox x



antonio miguel orias via bg5nhah26g2t7b.gl-diodzua1.can98.bnc.salesforce.com
to me ▾

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

Created By: Antonio Miguel Orias

Conclusion

In Conclusion, By implementing HandsMen Threads CRM in salesforce marks an innovation for company's goal of success and succeed in customer needs. By integrating salesforce CRM creating; custom objects, automation flows, Apex triggers, validation rules, and permission sets, As the system now operates in combined, scalable framework managing inventory, customer relationships, orders, and marketing campaigns.

This solution resolves problem for HandsMen Threads by:

1. Deliver timely and personalized communication through automated email alerts
2. Maintain data integrity and enforce business logic via validation and formula fields
3. Streamline inventory and order processing with scheduled flows and batch jobs
4. Enhance user experience and security through role-based access and permission sets

With this, HandsMen Threads is able to adapt to innovation, improve customer loyalty, and compete its brand in the fashion landscape.