

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

USE CASE:

Developing a premium fashion platform to streamline men's bespoke tailoring and enhance customer experience through personalized styling and seamless order management.

Project Overview

1. Project Phases

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.

Implement automation (flows, process builders, Apex triggers).

Set up data security and sharing rules.

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.

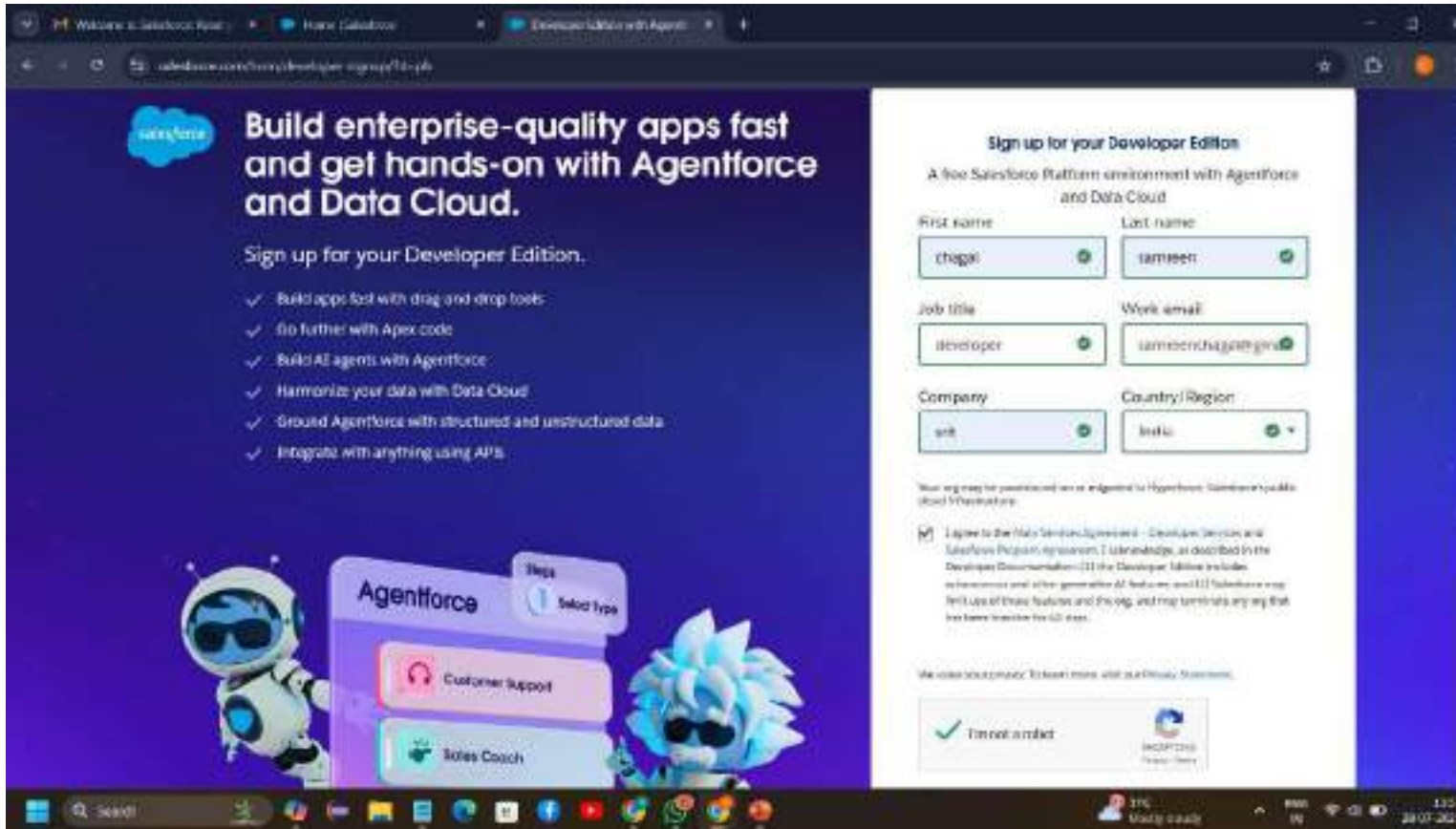
Post-go-live support and monitoring

Deliverable:

Solution Design Document including Object Model, ERD, and Automation Strategy.

Salesforce Credentials Setup

Creating Developer Account



Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag and drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name: chopki

Last name: samreen

Job title: Developer

Work email: samreen.chopki@gmail.com

Company: ank

Country/Region: India

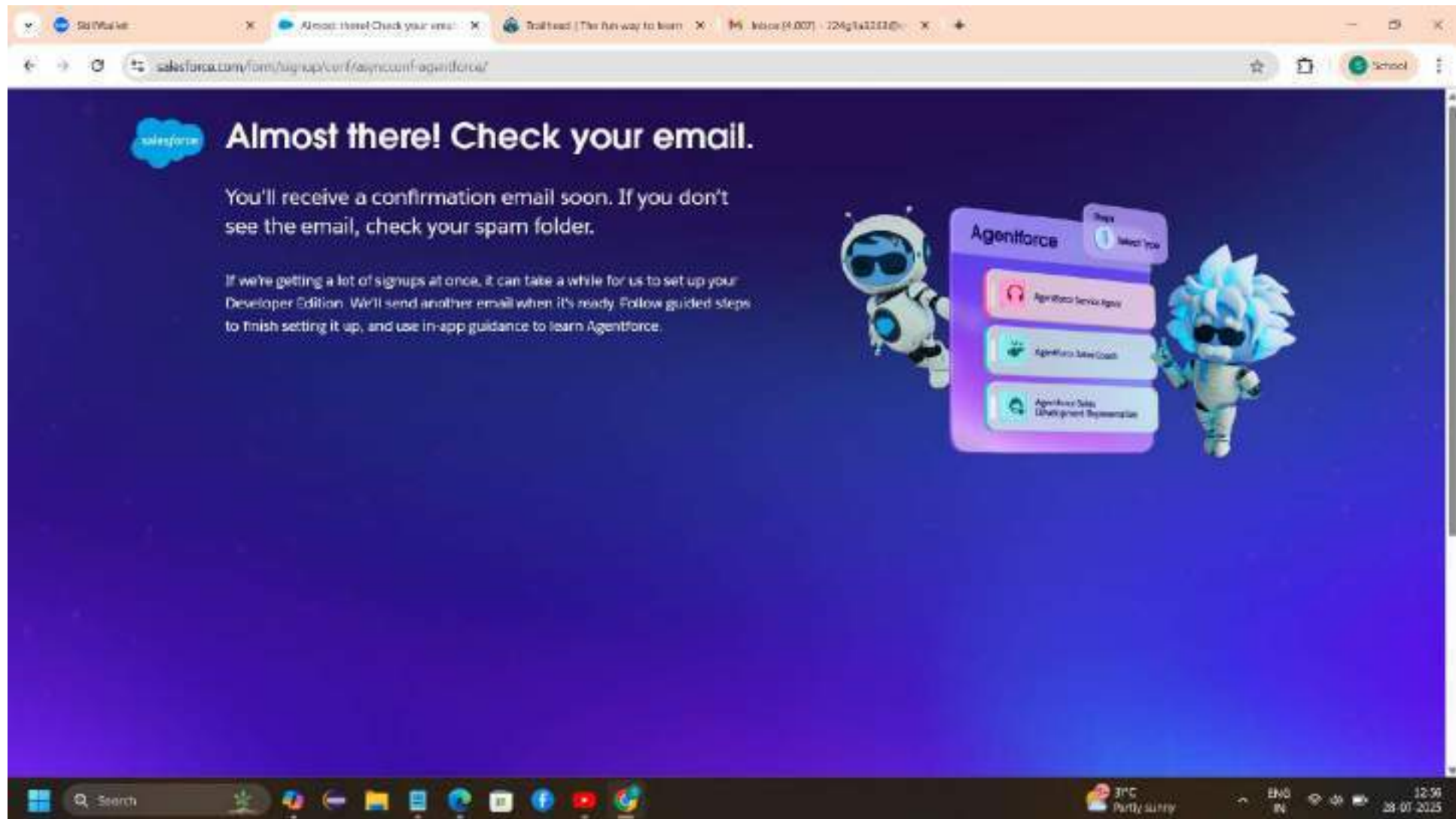
Your sign-up may be provisioned later or assigned to Hyperforce. Salesforce's public cloud is always on.

☒ I agree to the Salesforce Developer Edition - Developer Services and Salesforce Platform Agreement, I understand, as described in the Developer Documentation (I) the Developer Edition includes no Salesforce and other generative AI features and (II) Salesforce may limit use of these features and the org, and may terminate any org that has been inactive for 120 days.

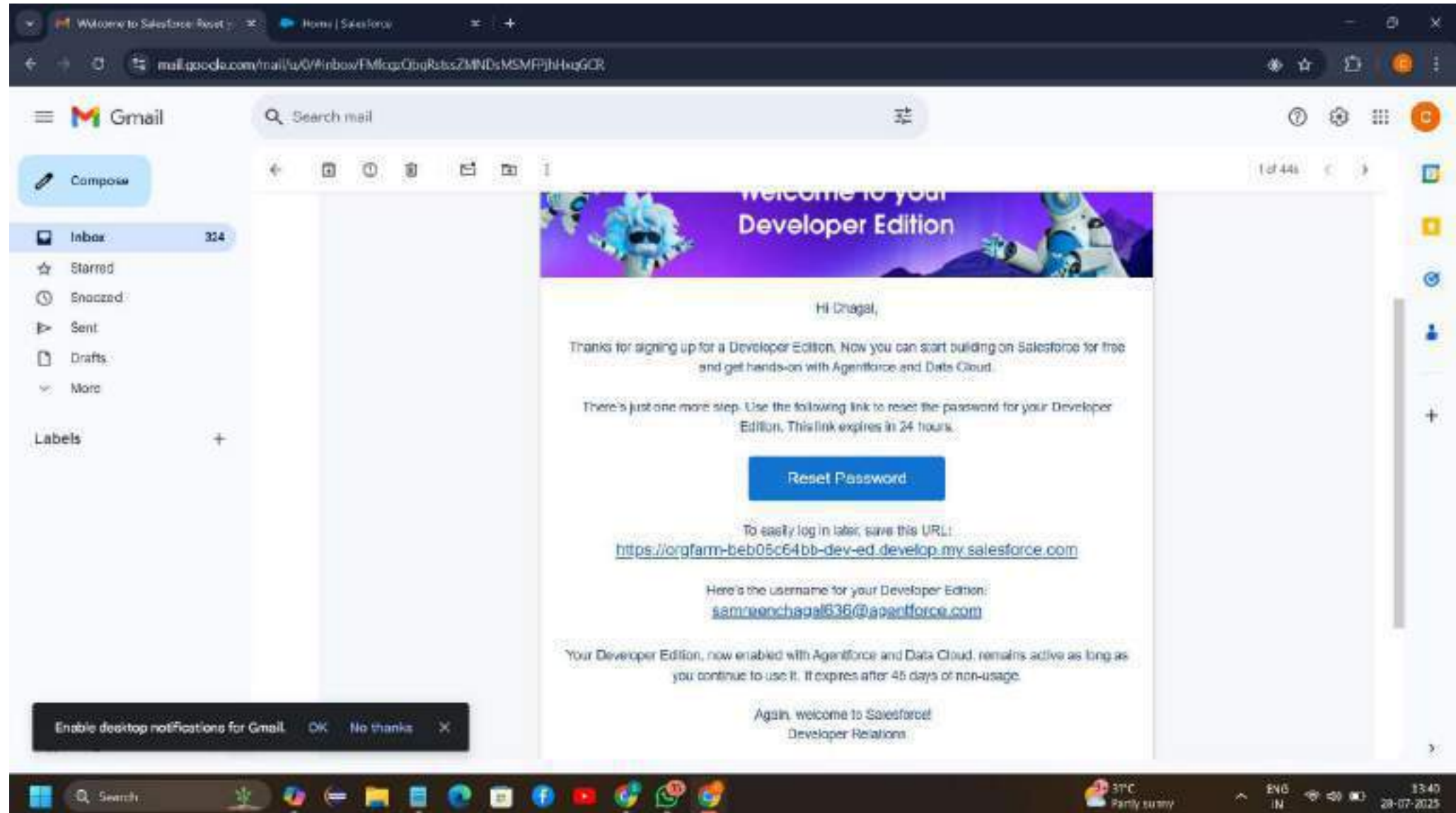
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☒ I'm not a robot

SALESFORCE



Account Activation



Browser tabs: Inbox (324) - samneonchagali, Home | Salesforce, Developer Edition with Agent...

Address bar: orgform-bet06c54bb-dev-ed.develop.lightning.force.com/lightning/page/home

Search bar: Search...

Navigation menu: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, More

Seller Home

Good afternoon, Chagal. Let's get selling!

Close Deals

Opportunities owned by me and closing this quarter

Total Pipeline: \$0

- 0 Open
- 0 Won
- 0 Lost

[View Opportunities](#)

Plan My Accounts

Accounts owned by me

Accounts: 0

- 0 Upcoming Activity
- 0 Past Activity
- 0 No Activity

[View Accounts](#)

Grow Relationships

Contacts owned by me and created in the last 90 days

Contacts: 0

- 0 Upcoming Activity
- 0 Past Activity
- 0 No Activity

[View Contacts](#)

Build Pipeline

Leads owned by me and created in the last 30 days

0 Upcoming Activity

My Goals

Set personal weekly or monthly goals for emails, calls, and meetings

Today's

Stay ahead of incidents

Help your teams proactively respond to large-scale disruptions with the free Customer Service Incident Management solution from Service Cloud.

[Dismiss](#) [Get Started](#)

To Do List

Windows taskbar: Search, 37°C Mostly cloudy, ENG IN, 13:57, 28-07-2023

Data Management - Objects

The following are the Custom objects which we need to create

HandsMen Customer

HandsMen Order

HandsMen Product

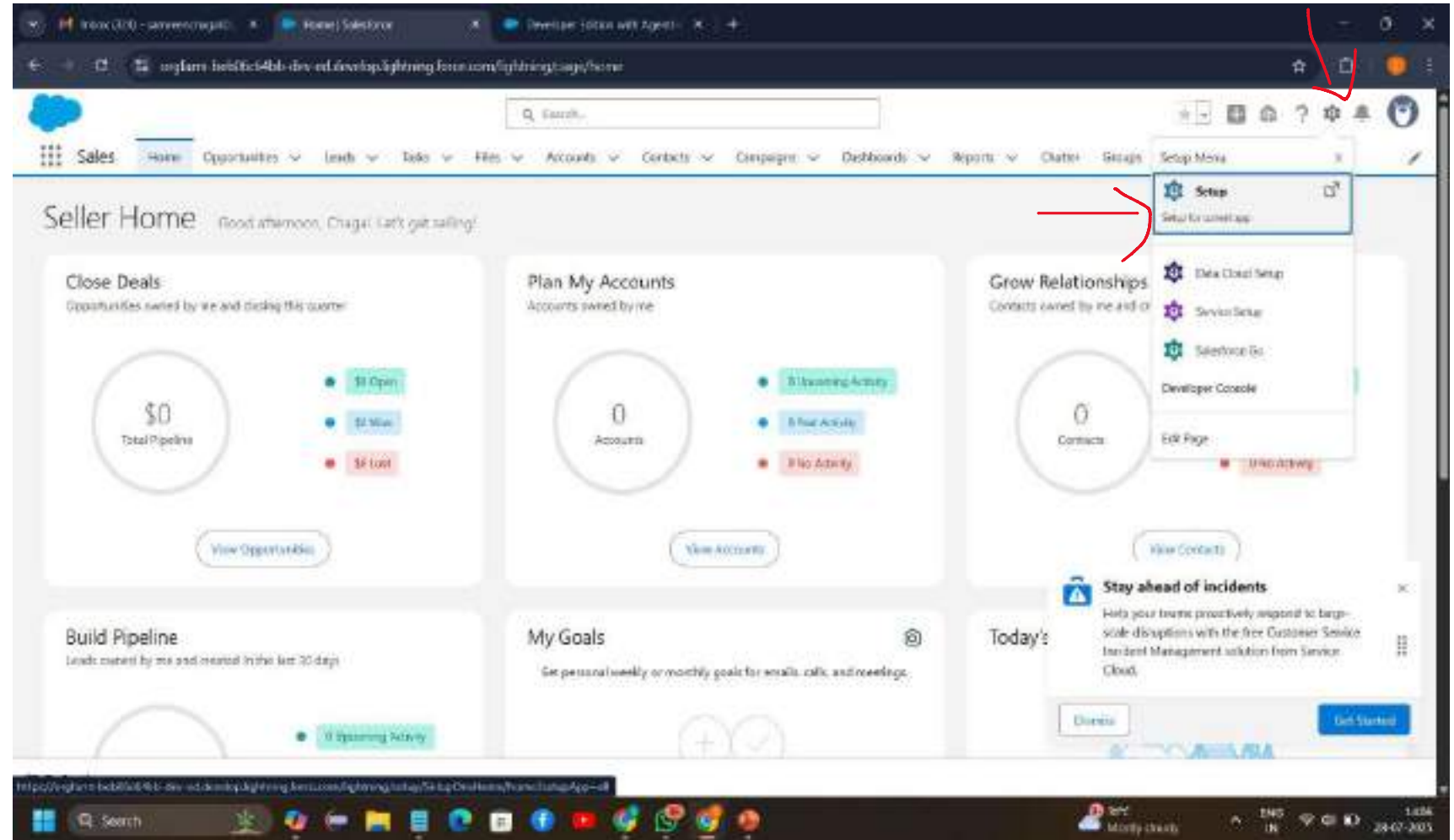
Inventory

Marketing Campaign

Object - HandsMen Customer

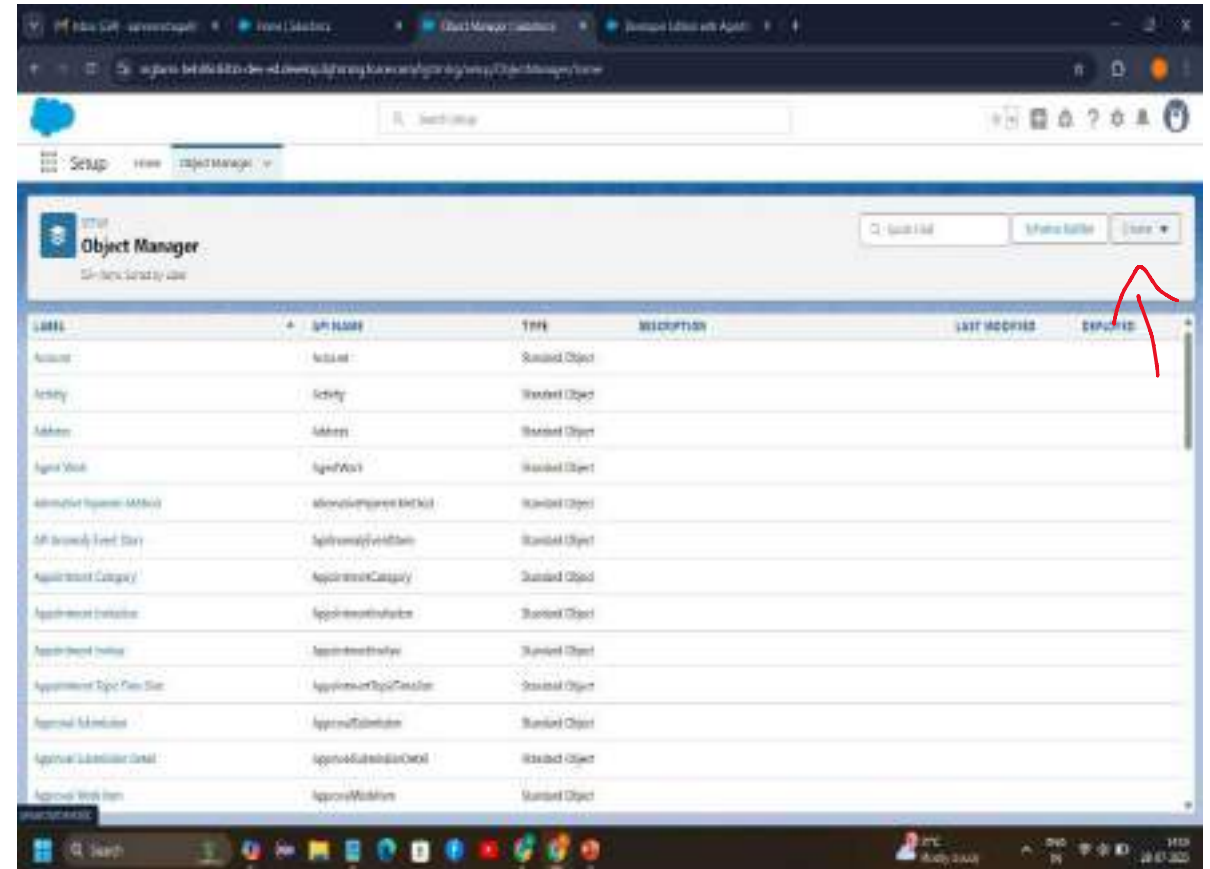
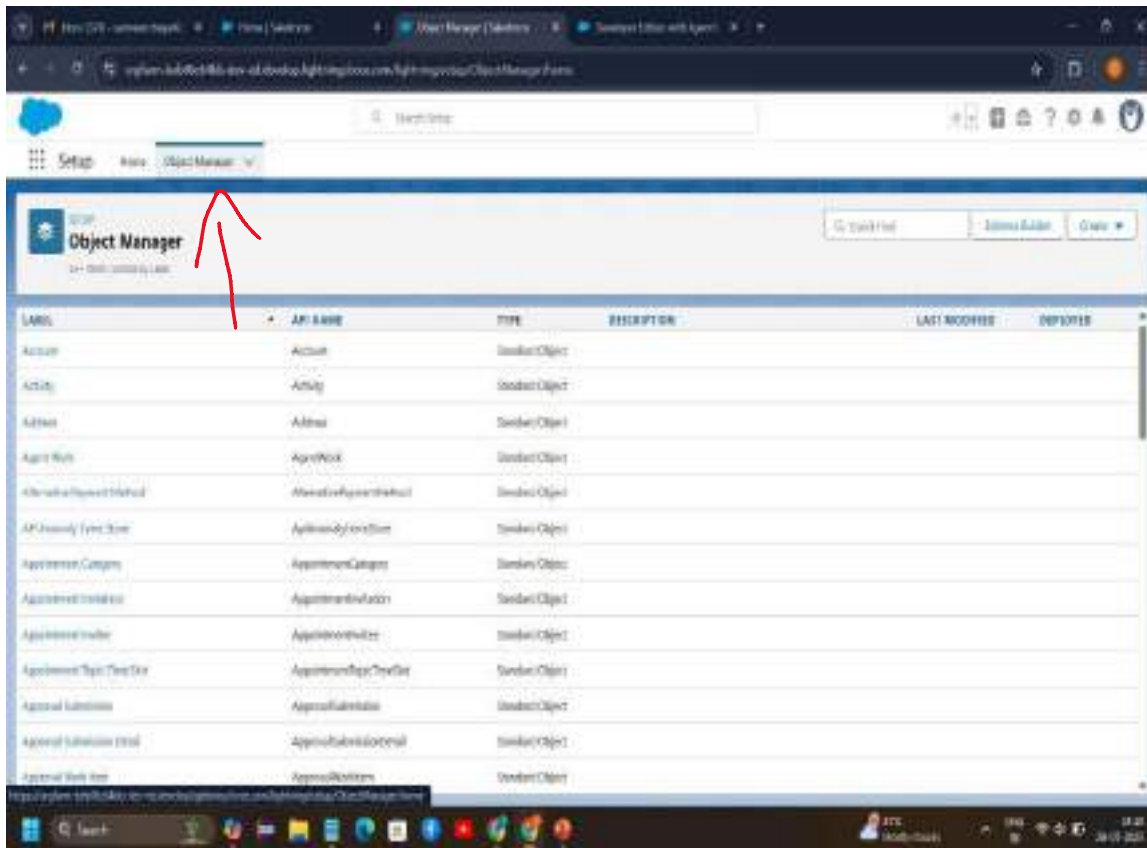
Description

To Navigate to Setup page:
Click on gear icon → click setup.



To create an object:

From the setup page → Click on Object Manager → Click on Create → Click on Custom Object



Click on Custom Object

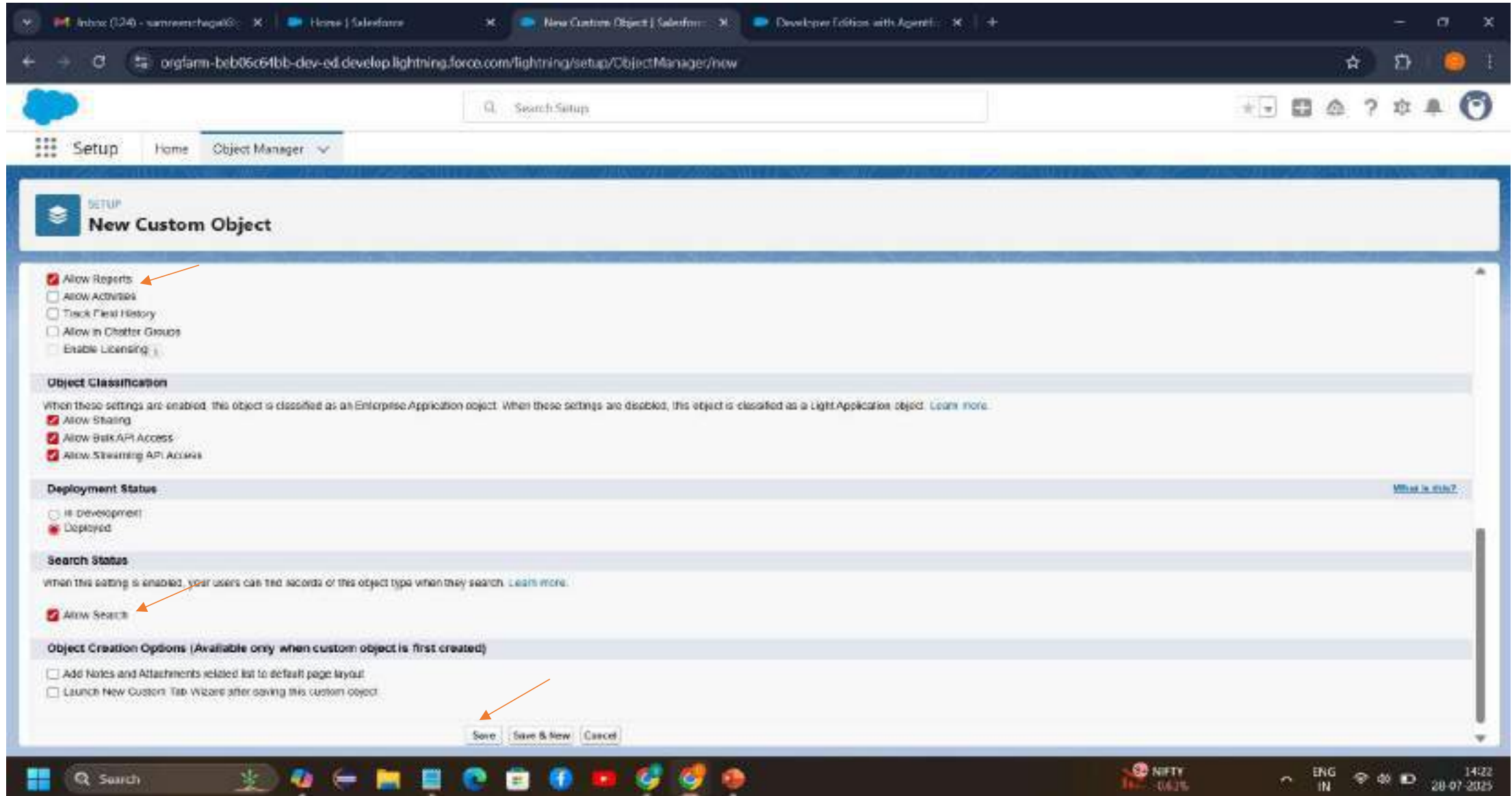
The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Object Manager' section is active, displaying a list of objects. A red arrow points to the 'LAST MOON' column header, which has a dropdown menu open. The dropdown menu contains two options: 'Custom Object' and 'Custom Object from Spreadsheet'.

LABEL	API NAME	TYPE	DESCRIPTION
Account	Account	Standard Object	
Activity	Activity	Standard Object	
Address	Address	Standard Object	
Agent Work	AgentWork	Standard Object	
Alternative Payment Method	AlternativePaymentMethod	Standard Object	
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object	
Appointment Category	AppointmentCategory	Standard Object	
Appointment Invitation	AppointmentInvitation	Standard Object	
Appointment Invitee	AppointmentInvitee	Standard Object	
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object	
Approval Submission	ApprovalSubmission	Standard Object	
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object	
Approval Work Item	ApprovalWorkItem	Standard Object	

1. Enter the label name → HandsMen Customer
2. Plural label name → HandsMen Customer
3. Enter Record Name Label and Format
4. Record Name → HandsMen Customer Name
5. Data Type → Text

The screenshot shows the Salesforce 'New Custom Object' setup page. The browser address bar displays the URL: `orgform-bbb06d4bb-dw-ed-develop.lightning.force.com/lightning/setup/ObjectManager/new`. The page has a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. The main content area is titled 'New Custom Object' and contains the 'Custom Object Information' section. This section includes fields for 'Label' (HandsMen Customer), 'Plural Label' (HandsMen Customer), 'Starts with new record' (unchecked), 'Object Name' (HandsMen_Customer), and 'Description'. Below these are radio buttons for 'Create New Help Setting' (selected) and 'Create New Help Setting' (unselected). The 'Enter Record Name Label and Format' section includes a 'Record Name' field (HandsMen Customer Name) and a 'Data Type' dropdown (Text). A warning message states: 'Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.' The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 14:17 on 26-07-2015.

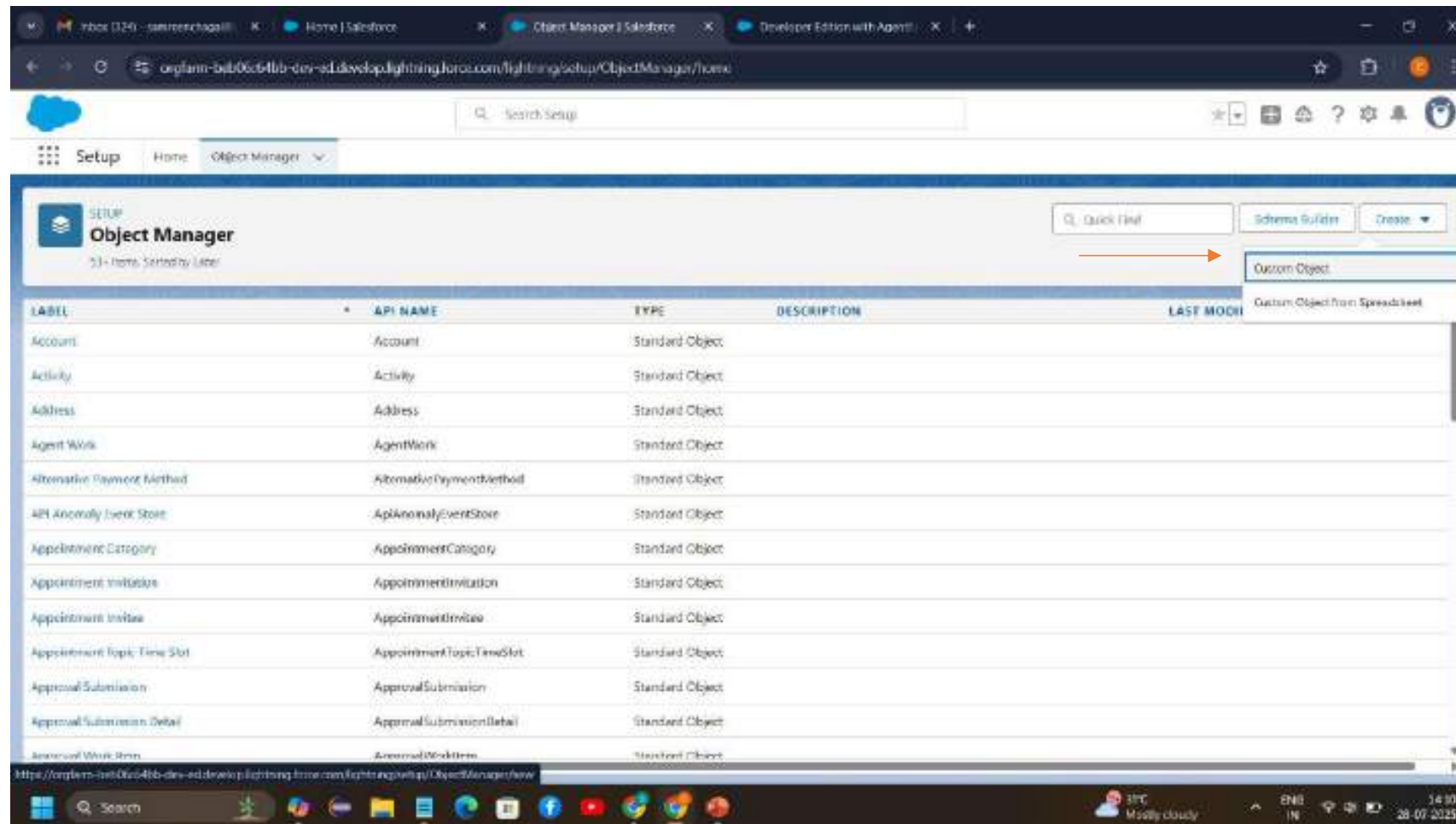
Click on Allow reports,
Allow search → **Save**.



Create HandsMen Product Object

To create an object:

From the setup page → Click on Object Manager → Click on Create → Click on Custom Object



1. Enter the label name → HandsMen Product

2. Plural label name → HandsMen Products

3. Enter Record Name Label and Format

4. Record Name → HandsMen Product Name

- Data Type → Text
- Click on Allow reports,
- Allow search → **Save**

The screenshot shows the Salesforce 'New Custom Object' setup page. The page is titled 'New Custom Object' and shows the 'Custom Object Information' section. In this section, the 'Label' field is set to 'HandsMen Product' and the 'Plural Label' is set to 'HandsMen Products'. The 'Object Name' is 'HandsMen_Product'. Below this, the 'Enter Record Name Label and Format' section shows the 'Record Name' as 'HandsMen Product Name' and the 'Data Type' as 'Text'. A warning message is visible: 'Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.' The page also includes a 'Required Information' tab and a 'Optional Features' section at the bottom.

Click on Allow reports,
Allow search → **Save**

The screenshot shows the Salesforce 'New Custom Object' setup page. The browser tabs at the top include 'Inbox (3/4) - janneedhagale', 'Home | Salesforce', 'New Custom Object | Salesforce', and 'Developer Edition with Agent'. The address bar shows the URL 'orgfam-hab05c64bb-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new'. The page header includes the Salesforce logo, a 'Search Setup' bar, and navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'New Custom Object' and contains several sections:

- Allow Reports:** This section has a red checkmark next to 'Allow Reports' (indicated by an orange arrow). Other options include 'Allow Activities', 'Track Field History', 'Allow in Chatter Group', and 'Enable Licensing'.
- Object Classification:** This section explains that when settings are enabled, the object is classified as an Enterprise Application object, and when disabled, it is a Light Application object. It includes a 'Learn more' link. The options 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access' are all checked with red checkmarks.
- Deployment Status:** This section has a 'What is this?' link. The options 'In Development' and 'Deployed' are shown, with 'Deployed' selected and marked with a red checkmark.
- Search Status:** This section explains that when the setting is enabled, users can find records of the object type when they search. It includes a 'Learn more' link. The option 'Allow Search' is checked with a red checkmark (indicated by an orange arrow).
- Object Creation Options (Available only when custom object is first created):** This section includes options for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'.

At the bottom of the page, there are three buttons: 'Save', 'Save & New', and 'Cancel'. An orange arrow points to the 'Save' button. The Windows taskbar at the bottom shows the search bar, task view button, and several application icons. The system tray on the right shows the temperature (32°C), weather (Partly sunny), language (ENG IN), and date (28-07-2025).

Create HandsMen Order Object

To create an object:

From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

Enter the label name → HandsMen Order

Plural label name → HandsMen Orders

Enter Record Name Label and Format

Record Name → HandsMen OrderNumber

Data Type → Auto Number

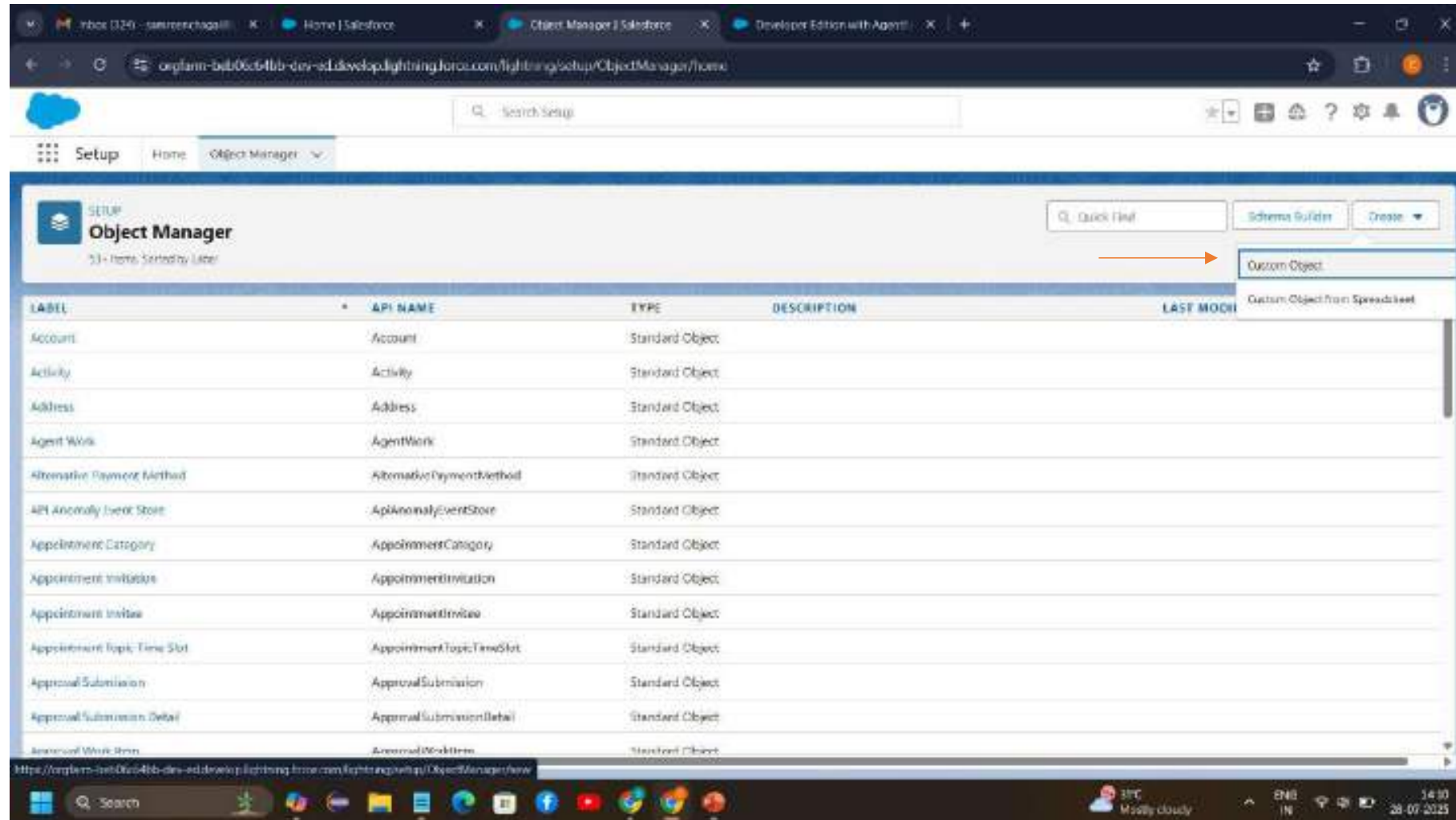
Display Format → O-{0000}

Starting Number → 001

Click on Allow reports,

Allow search → **Save**

From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Object Manager' header includes a search bar and a 'Create' dropdown menu. An orange arrow points to the 'Custom Object' option in the dropdown. The main area displays a table of standard objects.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Agent Work	AgentWork	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Approval Submission	ApprovalSubmission	Standard Object		
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object		
Approval Work Item	ApprovalWorkItem	Standard Object		

1. Enter the label name → HandsMen Order
2. Plural label name → HandsMen Orders
3. Enter Record Name Label and Format
4. Record Name → HandsMen OrderNumber

- Data Type → Auto Number
- Display Format → O-{0000}
- Starting Number → 001

The screenshot shows the 'New Custom Object' setup page in Salesforce. The page is titled 'New Custom Object' and contains several sections for configuring the object. An orange arrow points to the 'Label' field, which contains 'HandsMen Order'. Another orange arrow points to the 'Record Name' field, which contains 'HandsMen Order Name'. The 'Data Type' is set to 'Auto Number', the 'Display Format' is 'O-{0000}', and the 'Starting Number' is '001'.

The page includes the following fields and sections:

- Label:** HandsMen Order (Example: Account)
- Plural Label:** HandsMen Orders (Example: Accounts)
- Starts with word 'and':** ☐
- Object Name:** HandsMen_Order (Example: Account)
- Description:** (Empty text area)
- Connect, Search, Help, Setting:** ☐ Open the standard Salesforce.com Help & Training window. ☐ Open a window using a Visualforce page.
- Enter Record Name Label and Format:**
 - Record Name:** HandsMen Order Name (Example: Account Name)
 - Data Type:** Auto Number (Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.)
 - Display Format:** O-{0000} (Example: A-10000) YES! IS IT!!
 - Starting Number:** 001

Info (124) | comminchagall | X | Home | Salesforce | X | New Custom Object | Salesforce | X | Developer Edition with Agents | X | +

org/ami-bcd0cd4fb-dev-ed/develop/lightning/setup/ObjectManager/new

Search Setup

Setup | Home | Object Manager

SETUP

New Custom Object

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Learning

Object Classification

When these settings are enabled, the object is classified as an enterprise application object. When these settings are disabled, the object is classified as a Lightning Experience object. [Learn more](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

☐ In Development

☒ Deployed

[What is this?](#)

Search Status

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

☒ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

Save

Save & Close

Cancel

Search

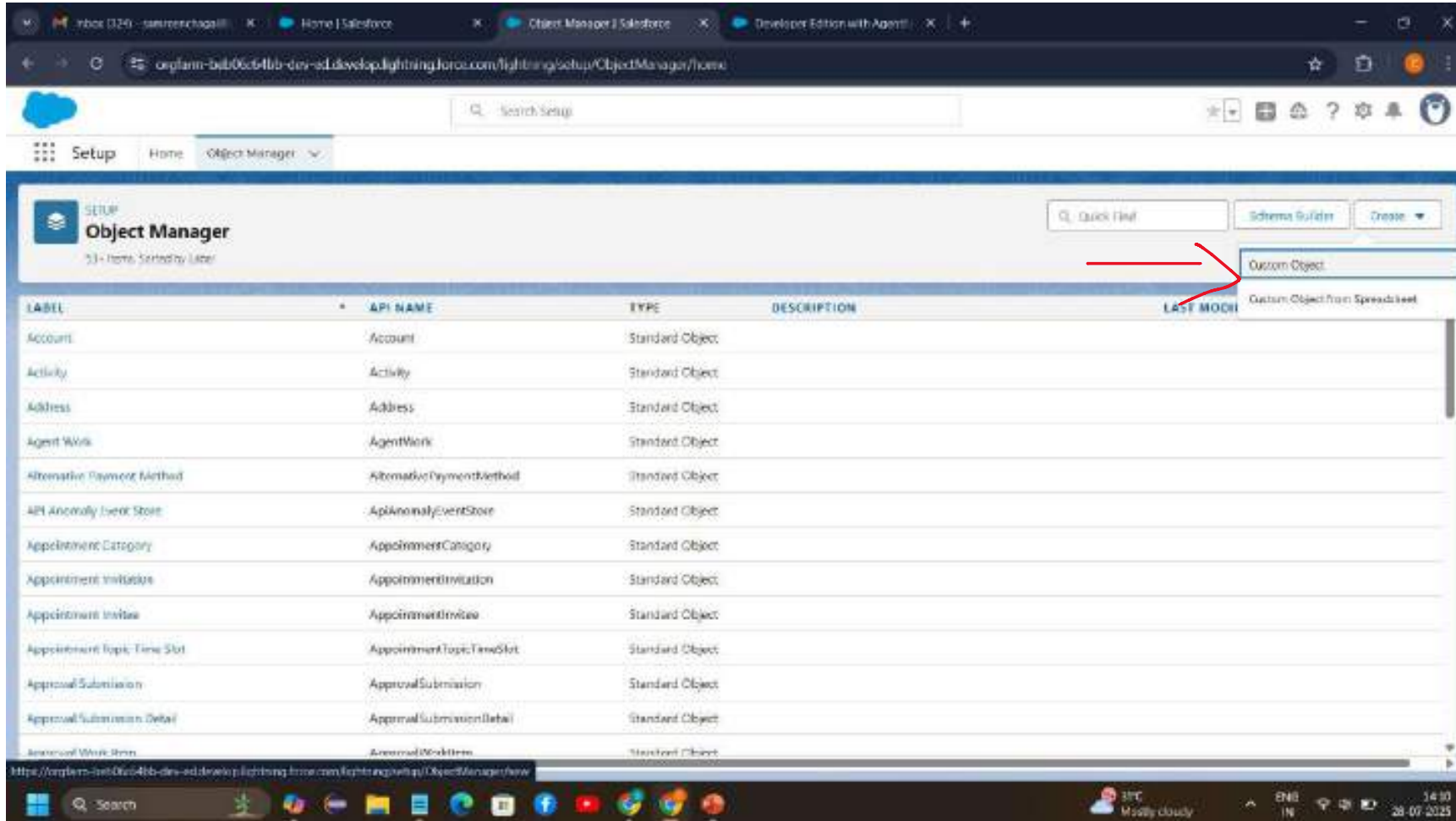
Windows taskbar with icons for File Explorer, Edge, and other applications.

14:39 28-07-2025

Create Inventory Object

To create an object:

From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



The screenshot shows the Salesforce Object Manager interface. The 'Create' button in the top right corner is highlighted with a red arrow, and the 'Custom Object' option is selected from the dropdown menu. The main table lists various standard objects with columns for Label, API Name, Type, Description, and Last Modified.

Label	API Name	Type	Description	Last Modified
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Agent Work	AgentWork	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Approval Submission	ApprovalSubmission	Standard Object		
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object		
Approval Work Item	ApprovalWorkItem	Standard Object		

Enter the label name → Inventory

Plural label name → Inventories

Enter Record Name Label and Format

Record Name → Inventory Number

Data Type → Auto Number

Display Format → 1-{0000}

Starting Number → 001

The screenshot shows the 'New Custom Object' setup page in Salesforce. The page is titled 'New Custom Object' and contains several sections for configuring the object. The 'Label' section has 'Inventory' entered, with an orange arrow pointing to it. The 'Plural Label' is 'Inventories'. The 'Object Name' is 'Inventory'. The 'Record Name' section has 'Inventory Name' entered, with an orange arrow pointing to it. The 'Data Type' is 'Auto Number', 'Display Format' is '1-{0000}', and 'Starting Number' is '001'. The page also includes a 'Context-Sensitive Help Setting' and a 'Warning' about high volume of records.

Label
Label: Inventory
Plural Label: Inventories
Starts with vowel/record: ☐

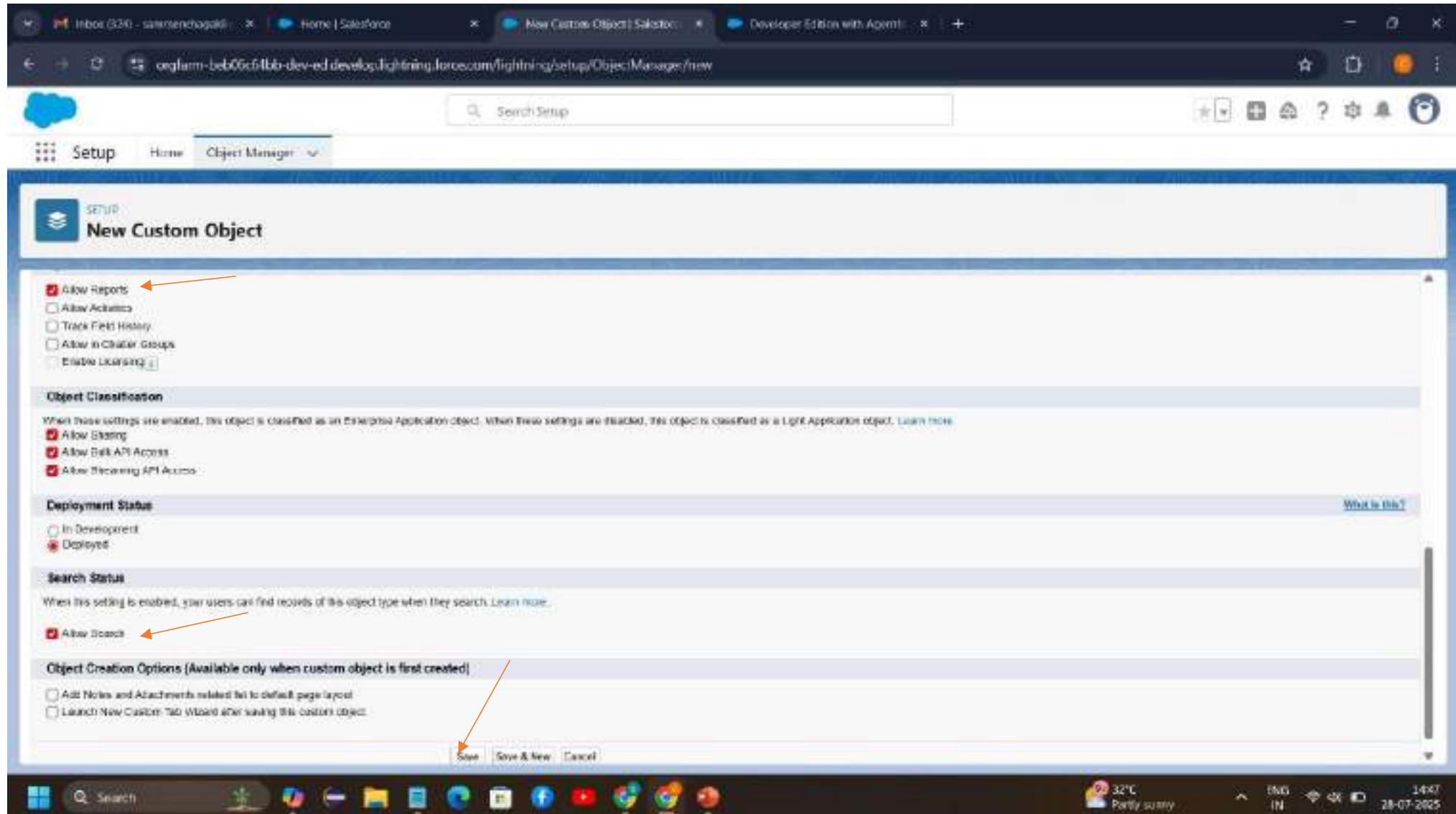
Object Name
Object Name: Inventory
Description:

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

Enter Record Name Label and Format
Record Name: Inventory Name
Data Type: Auto Number
Display Format: 1-{0000}
Starting Number: 001

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

Click on Allow reports,
Allow search → **Save**



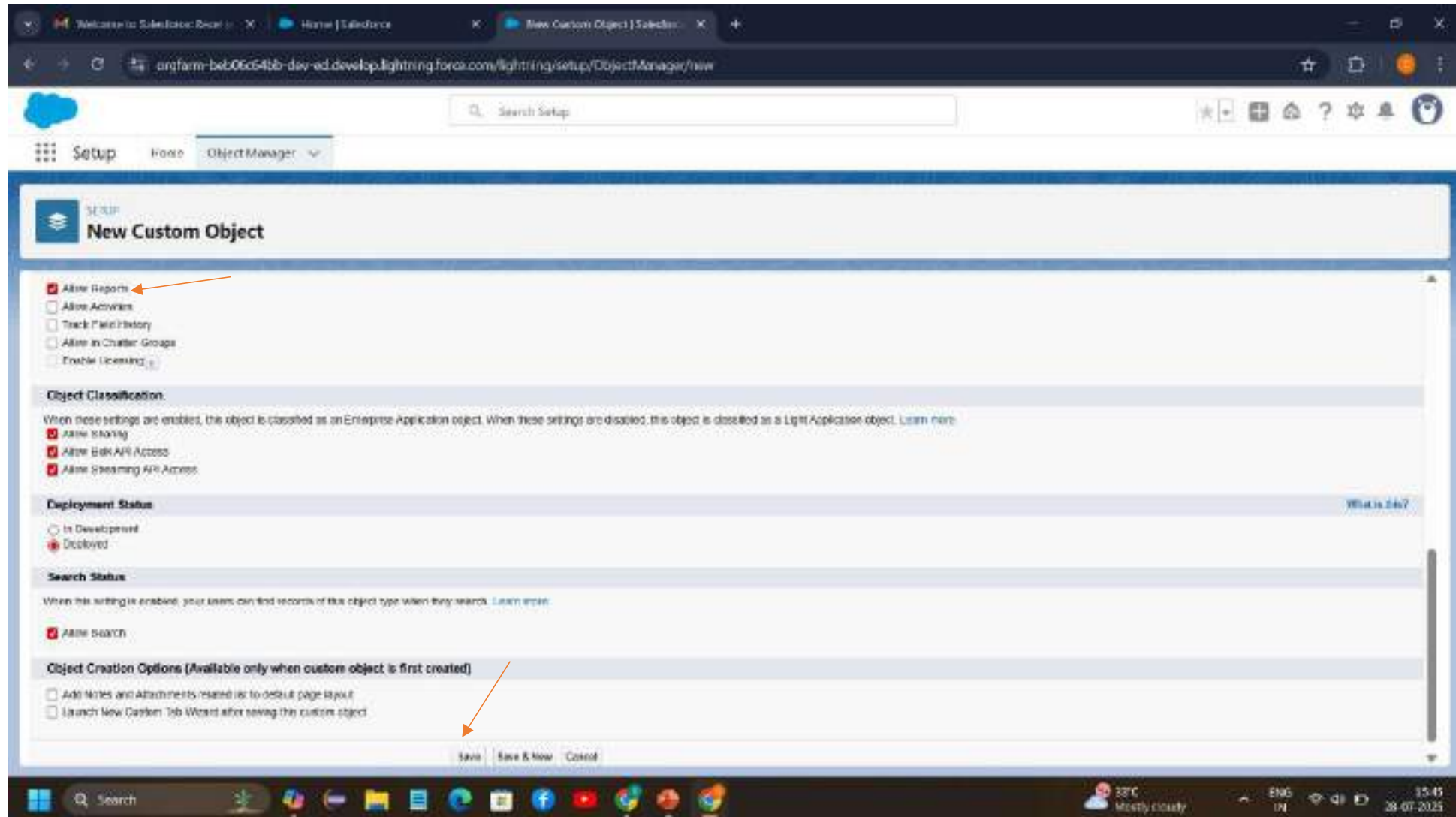
Object - Marketing Campaign

To create an object:

- From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
- Enter the label name → Marketing Campaign
- Plural label name → Marketing Campaigns
- Enter Record Name Label and Format
- Record Name → Marketing Campaign Number
- Data Type → Auto Number
- Display Format → MC-{0000}
- Starting Number → 001

The screenshot shows the 'New Custom Object' setup page in Salesforce. The page is titled 'New Custom Object' and has a search bar at the top. The main content area is divided into sections. The first section is 'Standard Object Labels' and contains fields for 'Label' (Marketing Campaign), 'Plural Label' (Marketing Campaigns), and 'Name with record' (unchecked). The second section is 'Object Name' and contains a field for 'Object Name' (Marketing Campaign). The third section is 'Enter Record Name Label and Format' and contains fields for 'Record Name' (Marketing Campaign Number), 'Data Type' (Auto Number), 'Display Format' (MC-{0000}), and 'Starting Number' (001). There are also checkboxes for 'Display Name' and 'Record Name'.

Click on Allow reports,
Allow search → **Save**

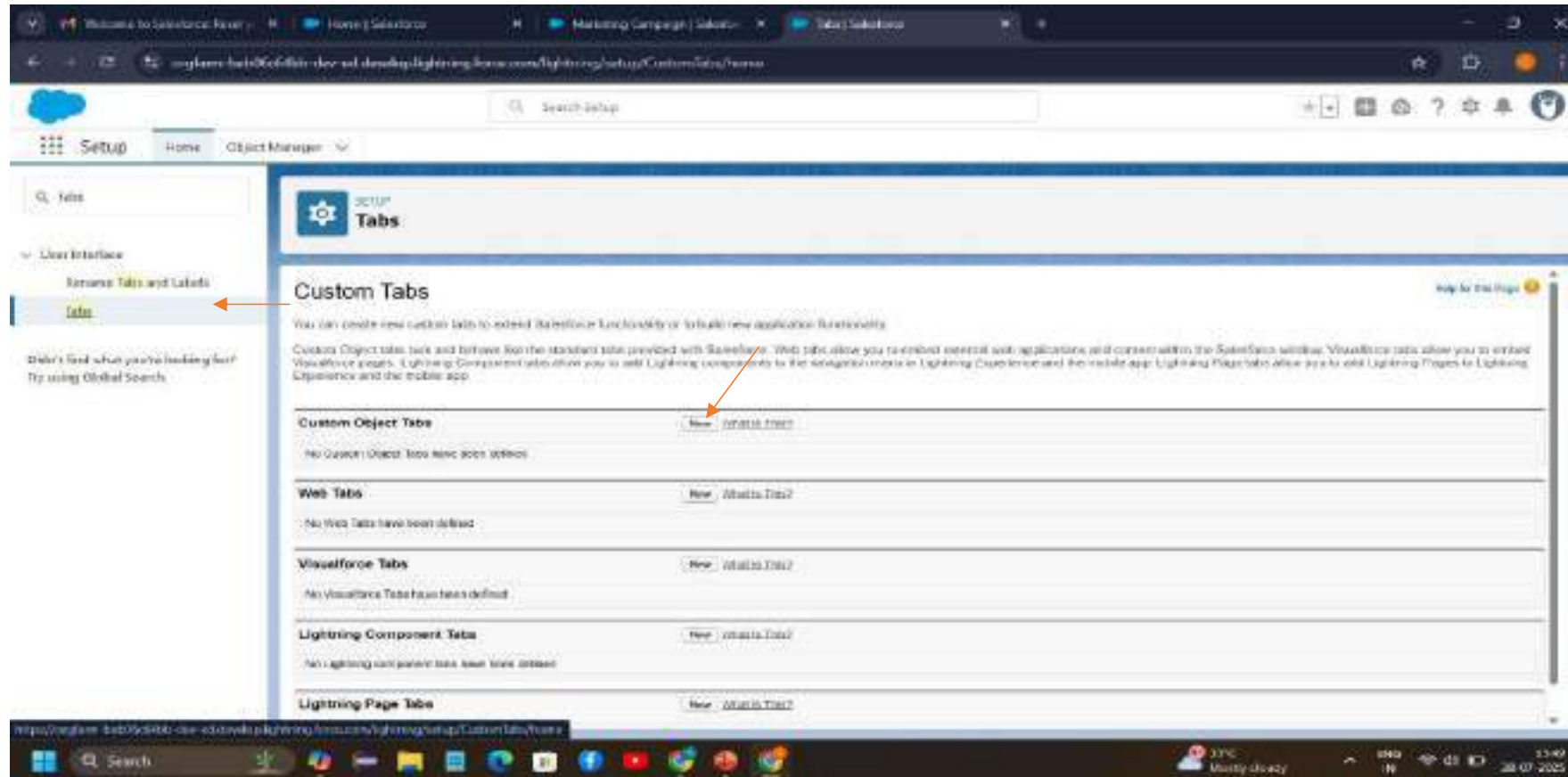


Data Management - Tabs

Creating a Custom Tab(HandsMen Customer)

To create a Tab(HandsMen Customer)

Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)



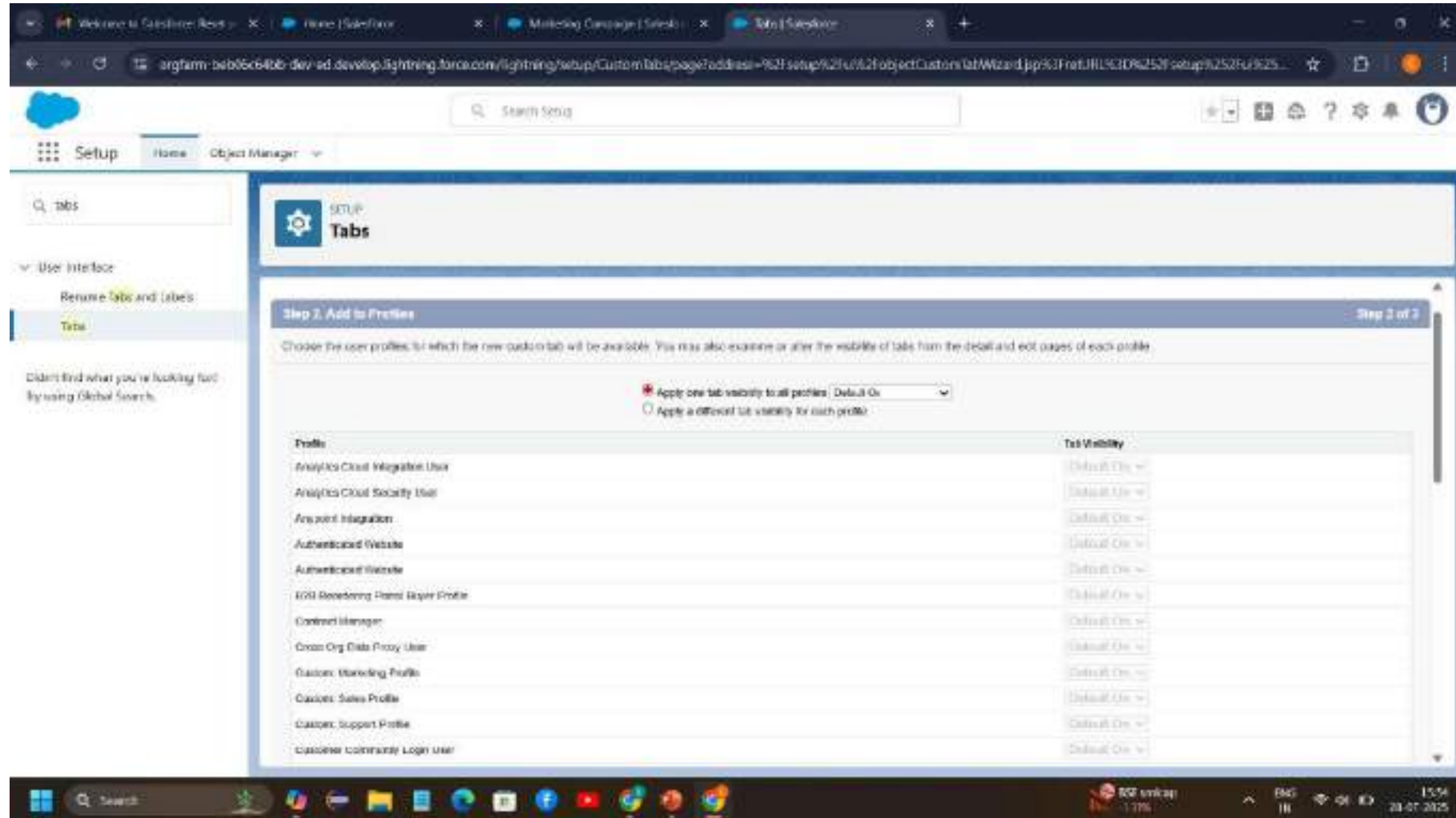
Select Object(HandsMen Customer) → Select any tab style

The screenshot displays the Salesforce Setup interface for configuring a new custom object tab. The browser address bar shows the URL: `orgname-beb06c64bb-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/pageAddress=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252F...`. The left sidebar contains the 'Setup' menu with 'Home' and 'Object Manager' options. The 'User Interface' section is expanded, showing 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'New Custom Object Tab' and includes a 'Help for This Page' link. The configuration steps are as follows:

- Step 1: Enter the Details** (Step 1 of 3)
- Choose the custom object for this new custom tab. Fill in other details.
- New Custom Object Tab** (1 Required Information)
- Select an existing custom object or create a new custom object entry.
 - Object:** HandsMen Customer (indicated by an orange arrow)
 - Tab Style:** Classic
- (Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
 - Splash Page Custom Link:** -None-
- Enter a short description.
 - Description:** [Text input field]

At the bottom right, there are 'Next' and 'Cancel' buttons. The Windows taskbar at the bottom shows the time as 15:32 on 28-07-2025.

Next (Add to profiles page) keep it as default



Next (Add to Custom App) keep it as default → Save.

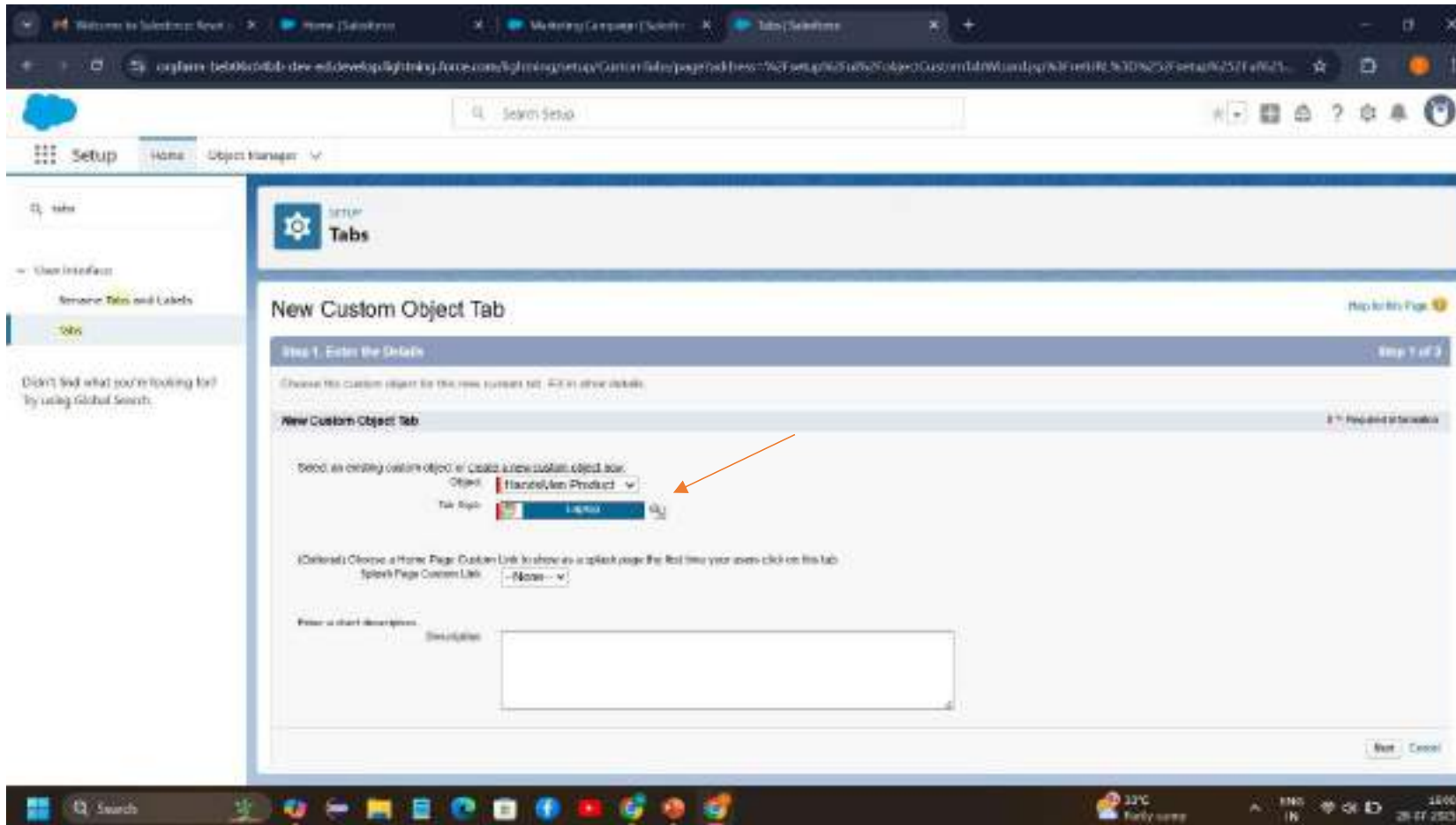
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' entered and a list of categories including 'User Interface' and 'Tabs'. The main content area is titled 'Setup Tabs' and displays a list of standard Salesforce tabs. Each tab has a checkbox in the right column, all of which are checked. The 'Sales Console' tab is highlighted in blue. At the bottom right, there are three buttons: 'Previous', 'Save', and 'Cancel'. An orange arrow points to the 'Save' button. The Windows taskbar is visible at the bottom of the screen.

Tab Name	Standard	Checkmark
Sales Console	(standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console	(standard__LightningService)	<input checked="" type="checkbox"/>
Sales	(standard__LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App	(standard__LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences	(standard__SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management	(standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager	(standard__DataManager)	<input checked="" type="checkbox"/>
Subscription Management	(standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>
Sales Cloud Mobile	(standard__SalesCloudMobile)	<input checked="" type="checkbox"/>
Dot Solutions	(standard__LightningDots)	<input checked="" type="checkbox"/>
Data Cloud	(standard__AudienceCloud)	<input checked="" type="checkbox"/>
Approvals	(standard__Approvals)	<input checked="" type="checkbox"/>
My Service Journey	(standard__MSJApp)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup	(standard__LightningScheduler)	<input checked="" type="checkbox"/>
Automation	(standard__FlowsApp)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations		

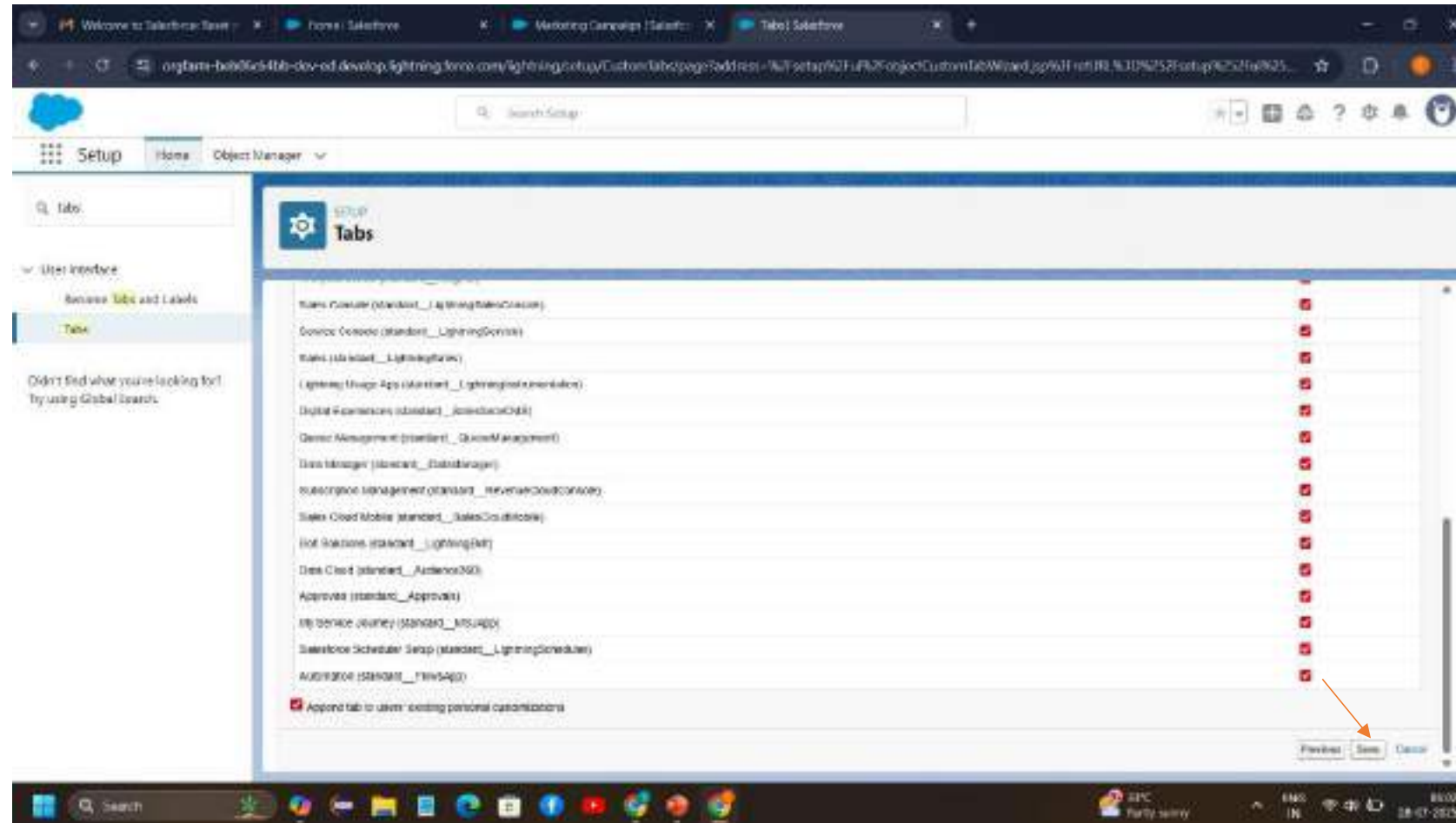
Create Tabs

Create Tab for Object - HandsMen Product

Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)



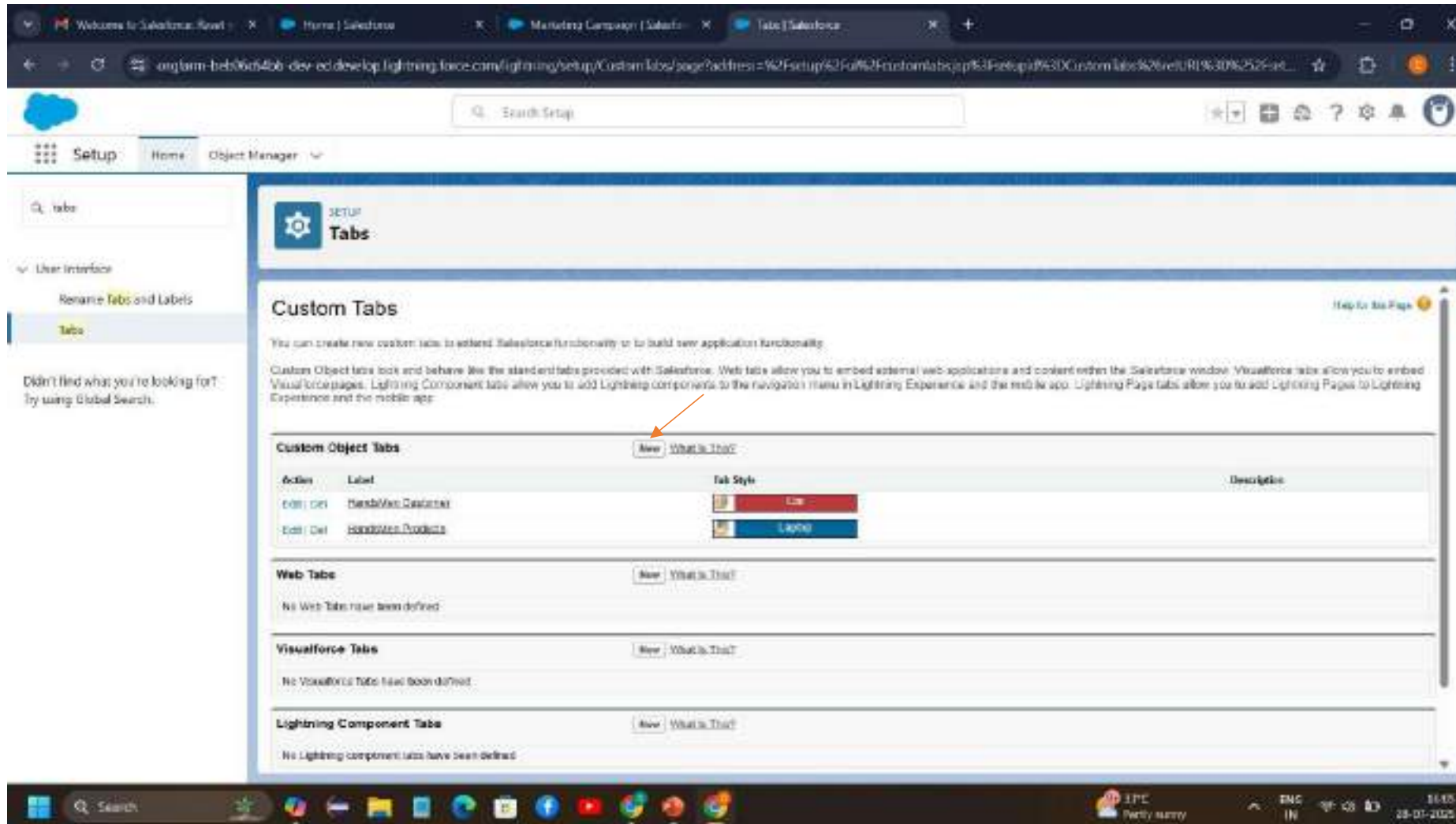
Select Object(HandsMen Product) → Select any tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.



Creating a Custom Tab(HandsMen Order)



To create a Tab(HandsMen Order)

Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "tabs" entered. The "User Interface" section is expanded, and "Tabs" is selected. The main content area is titled "Custom Tabs" and includes a "New" button with a tooltip that says "What's This?". Below this, there are four sections: "Custom Object Tabs", "Web Tabs", "Visualforce Tabs", and "Lightning Component Tabs". The "Custom Object Tabs" section contains a table with two rows: "HandsMen Customer" and "HandsMen Products". The "Web Tabs", "Visualforce Tabs", and "Lightning Component Tabs" sections each have a "No [type] tabs have been defined" message.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	HandsMen Customer	 Red	
Edit Del	HandsMen Products	 Blue	

Web Tabs

No Web Tabs have been defined.

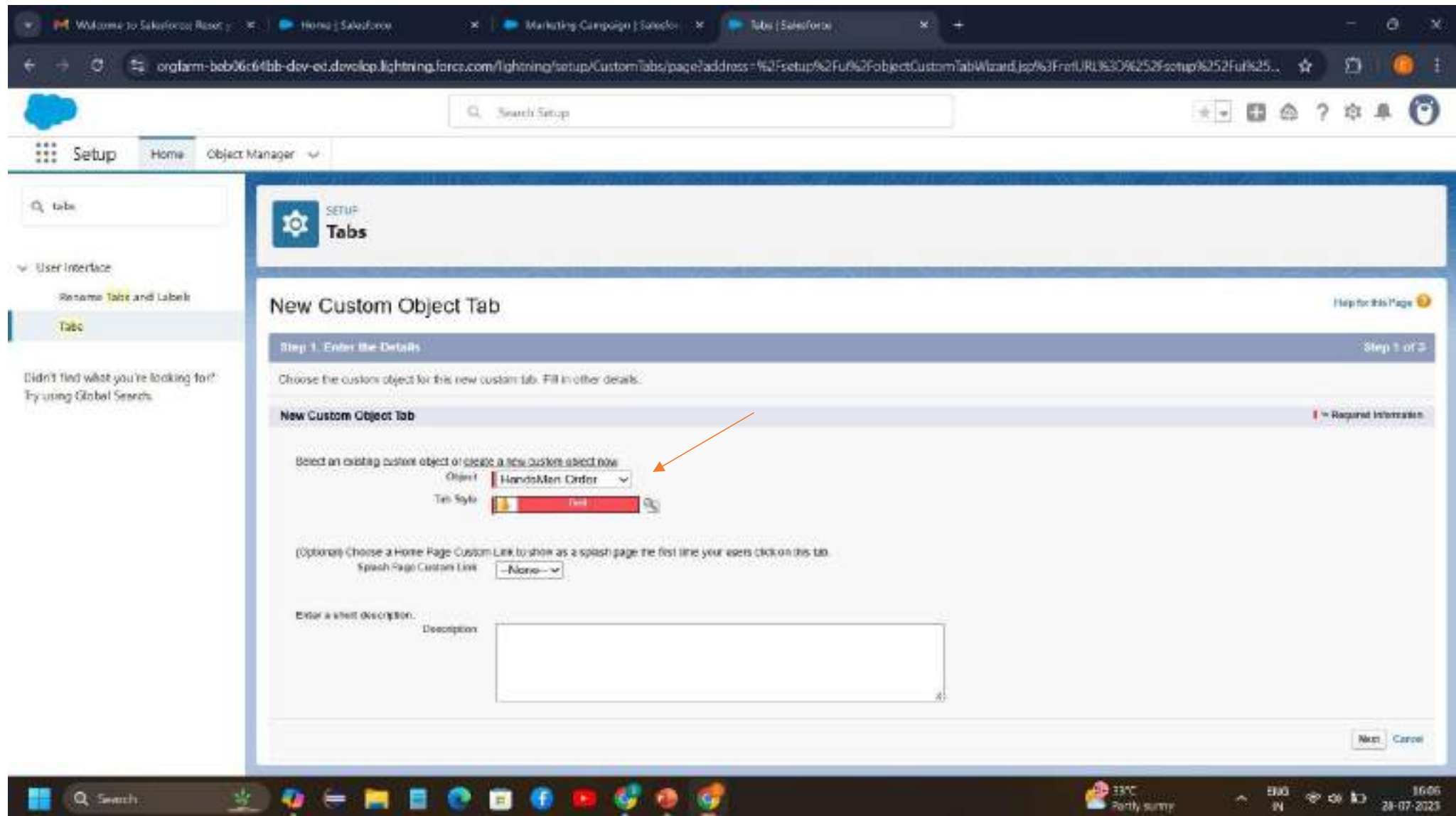
Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Select Object(HandsMen Order) → Select any tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.



Browser tabs: Welcome to Salesforce, Home | Salesforce, Marketing Campaign | Salesforce, Tabs | Salesforce

Address bar: oegfarm-bab06c64bb-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%2Furl%2F%252F...

Search Setup

Setup Home Object Manager

Search: tabs

User interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>
Sales Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>
Bot Solutions (standard__LightningBot)	<input checked="" type="checkbox"/>
Data Cloud (standard__Audience360)	<input checked="" type="checkbox"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>
My Service Journey (standard__MJApp)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

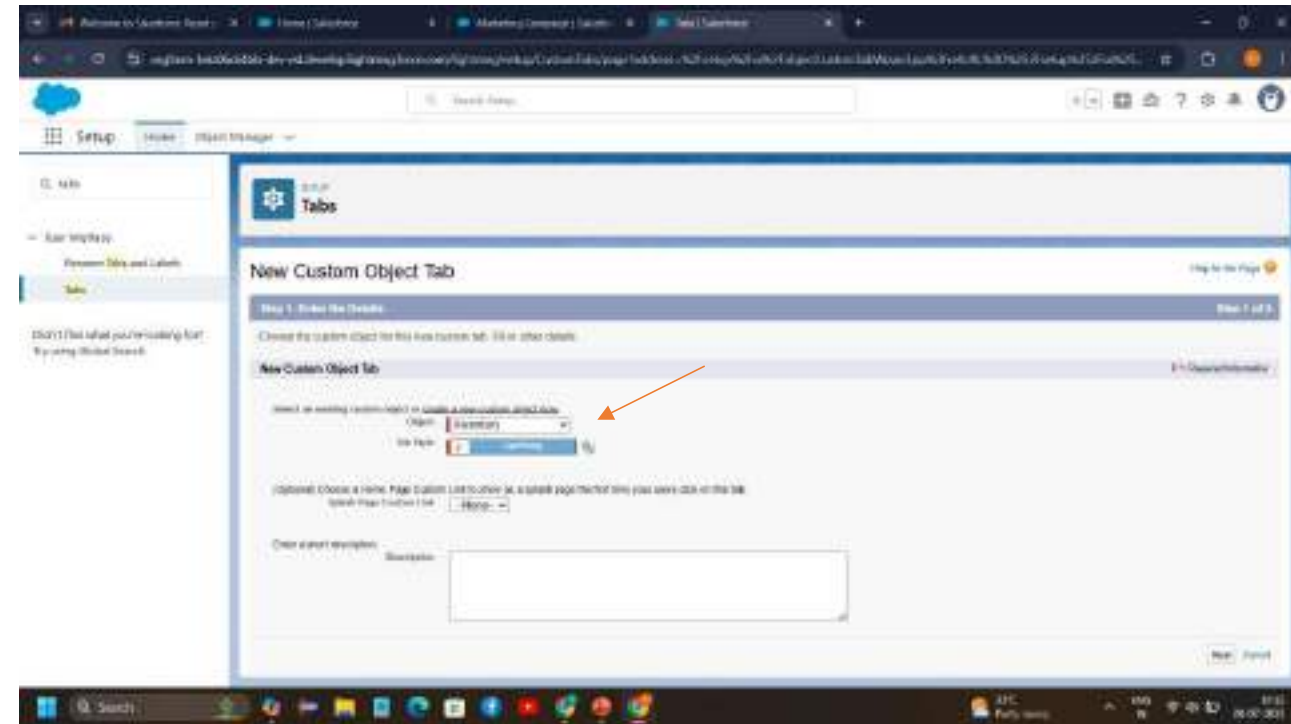
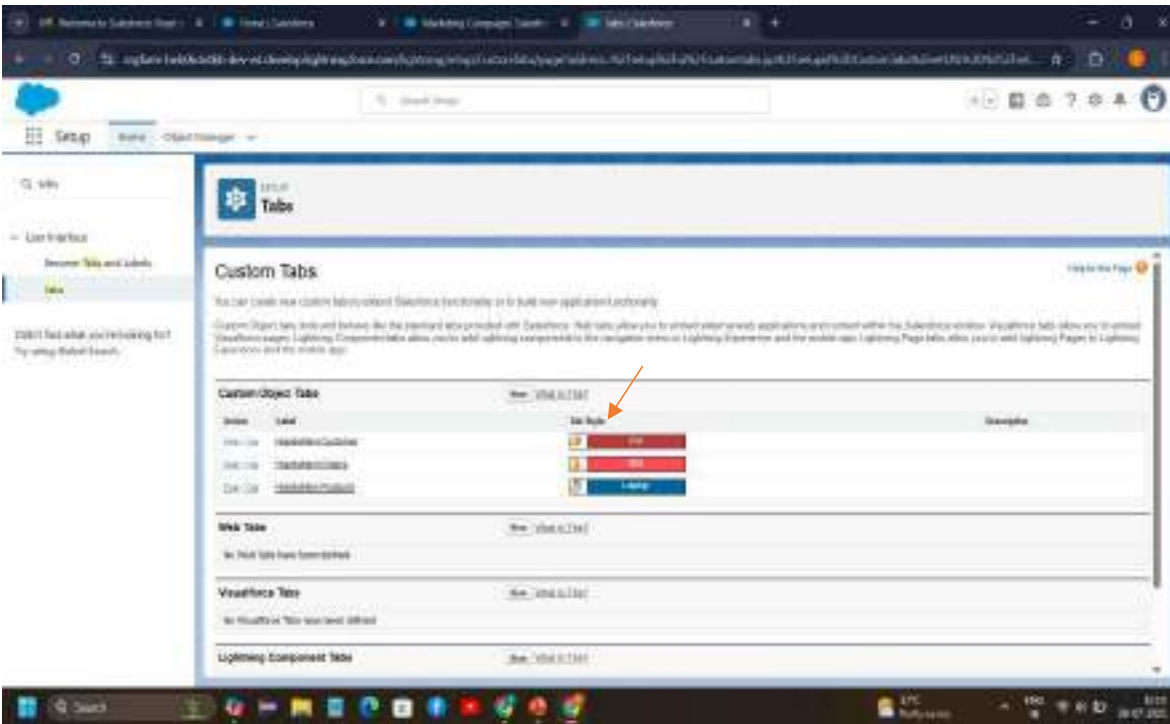
Previous Save Cancel

Windows taskbar: Search, 33°C Partly sunny, ENG IN, 16:01, 28-07-2023

Creating a Custom Tab(Inventory)

To create a Tab(Inventory)

Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab) Select Object(Inventory) → Select any tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.

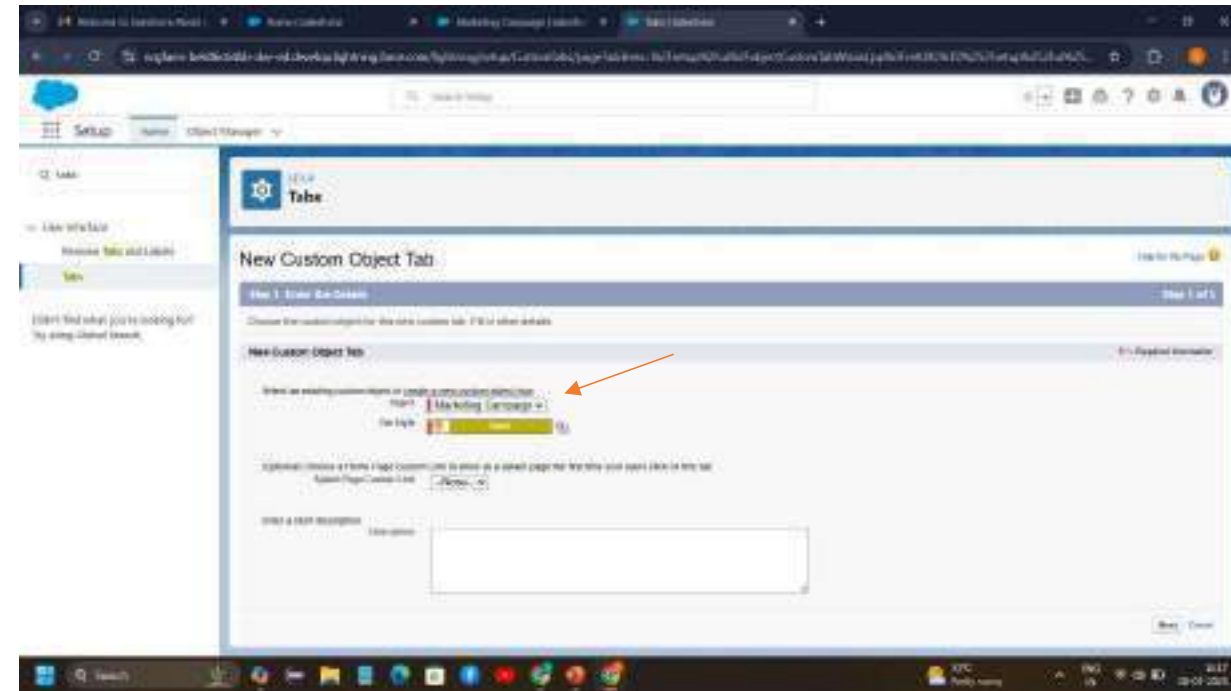
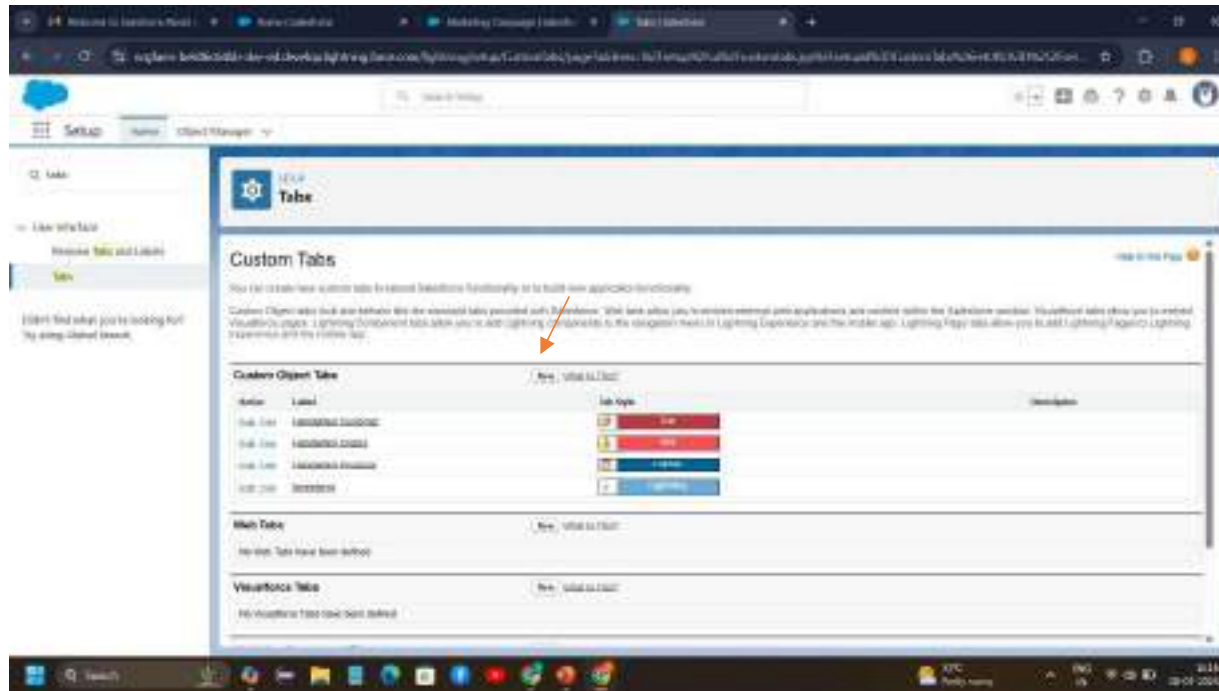


Creating a Custom Tab(Marketing Campaign)

To create a Tab(Marketing Campaign)

Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)

Select Object(Marketing Campaign) → Select any tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.



Data Management - App Manager

Create a Lightning App

To create a lightning app page:

Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains a search bar with 'app manager' entered and a list of apps. The main content area displays a table of 20 apps, including All Tabs, Analytics Studio, App Launcher, Approvals, Automation, Bolt Solutions, Community, Content, Data Cloud, Data Manager, Digital Experiences, Lightning Usage App, and Marketing CRM Guide. A 'New Lightning App' button is visible in the top right corner of the main content area.

App Name	Developer Name	Description	Last Modified Date	App Type	Visible
1. All Tabs	AllTabSet		7/18/2025, 1:29 PM	Classic	
2. Analytics Studio	Insights	Build CRM Analytics dashboards and apps	7/18/2025, 1:29 PM	Classic	✓
3. App Launcher	AppLauncher	App launcher tabs	7/18/2025, 1:29 PM	Classic	✓
4. Approvals	Approvals	Manage approvals and approval flows	7/18/2025, 1:29 PM	Lightning	✓
5. Automation	FlowApp	Automate business processes and repetitive tasks	7/18/2025, 1:29 PM	Lightning	✓
6. Bolt Solutions	LightningBolt	Discover and manage freshworks solutions designed for your industry	7/18/2025, 1:29 PM	Lightning	✓
7. Community	Community	Salesforce CRM/Communities	7/18/2025, 1:29 PM	Classic	✓
8. Content	Content	Salesforce CRM Content	7/18/2025, 1:29 PM	Classic	✓
9. Data Cloud	Audience360	Build a thorough and complete understanding of your customers	7/18/2025, 1:29 PM	Lightning	✓
10. Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes	7/18/2025, 1:29 PM	Lightning	✓
11. Digital Experiences	SalesforceCMS	Manage content and media for all of your sites	7/18/2025, 1:29 PM	Lightning	✓
12. Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	7/18/2025, 1:29 PM	Lightning	✓
13. Marketing CRM Guide	Marketing	Track sales and marketing efforts with CRM objects	7/18/2025, 1:29 PM	Classic	✓
		Discover new customer service capabilities	7/18/2025, 1:29 PM	Lightning	✓

- Fill the app name in app details and branding as follow

App Name : HandsMen Threads

Developer Name : this will auto populated

Description : Give a meaningful description

Image : optional (if you want to give any image you can otherwise not mandatory)

Primary color hex value : keep this default Then click Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next.

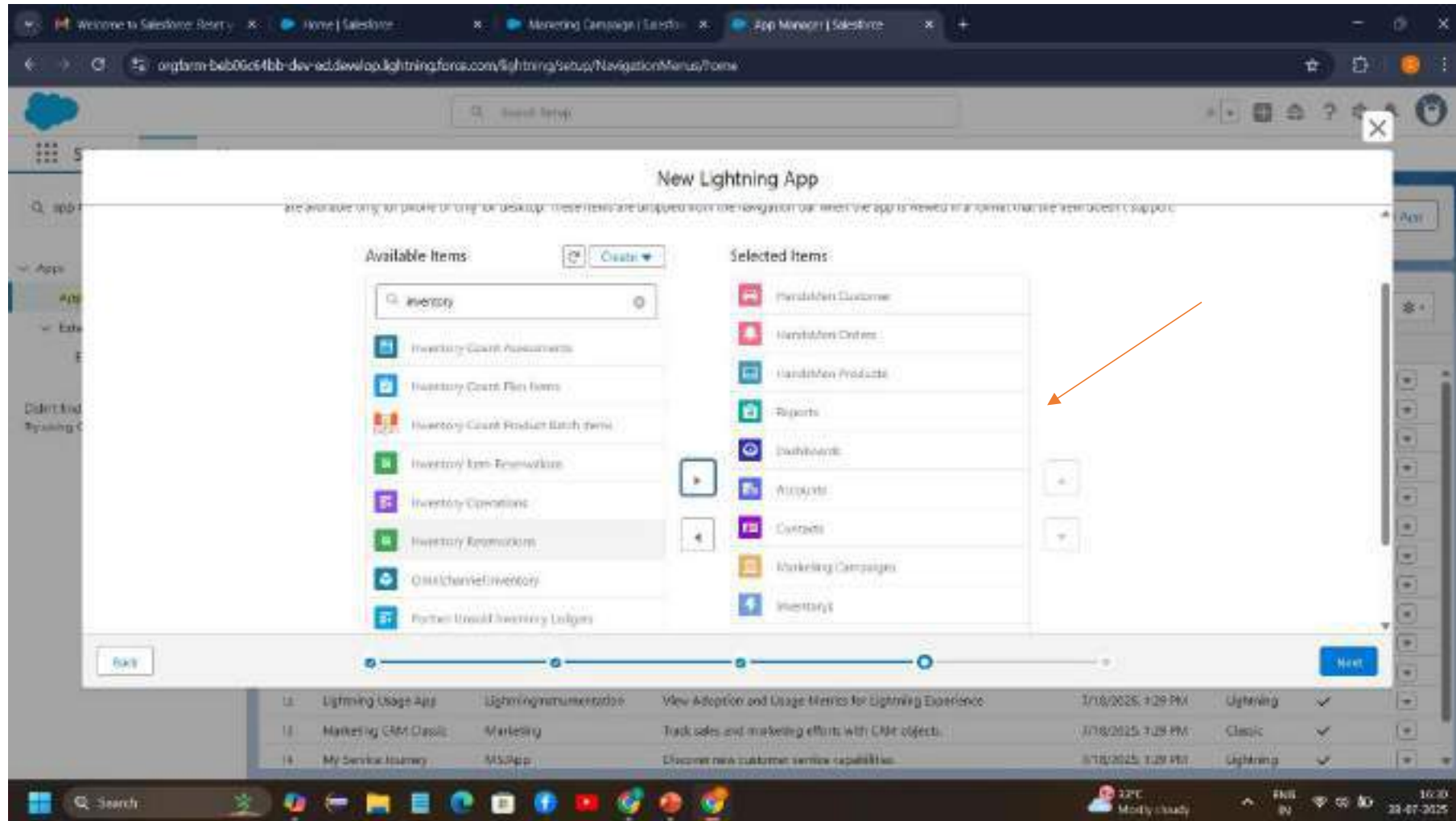
The screenshot shows the 'New Lightning App' setup page in Salesforce. The 'App Details & Branding' section is active, with the following fields filled out:

- App Name:** HandsMen Threads (highlighted with an orange arrow)
- Developer Name:** HandsMen_Threads
- Description:** HandsMen Threads
- App Branding:** The 'Image' field has a placeholder with an 'Upload' button. The 'Primary Color Hex Value' is set to '#0070C2'.

A 'Next' button is located at the bottom right of the form. Below the form, a table lists the app's details:

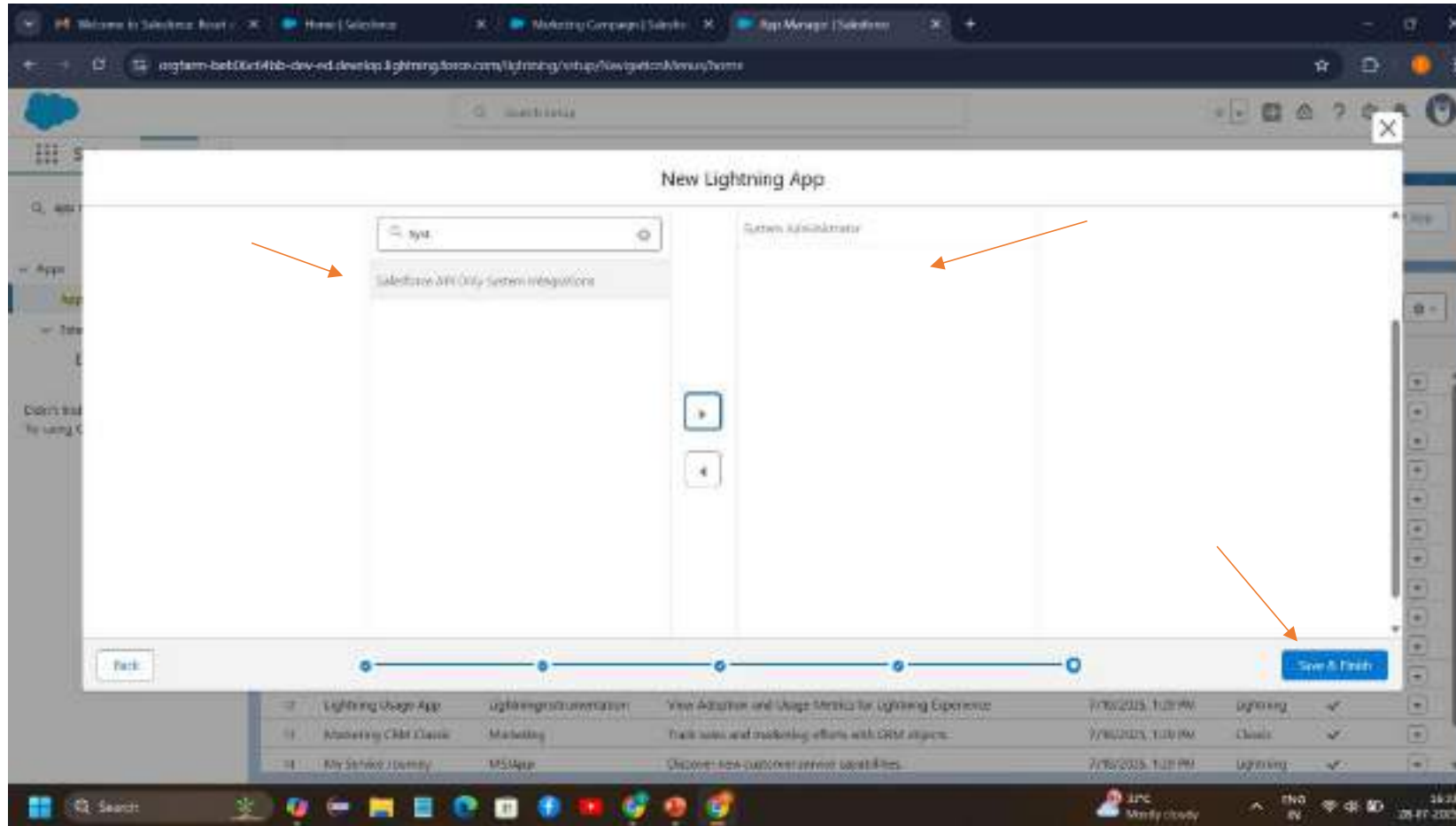
ID	App Name	App Type	App Description	Created Date	Status	Actions
12	Lightning (Setup) App	Lightning Experience	View Adoption and Usage Metrics for Lightning Experience	7/18/2025, 1:28 PM	Lightning	✓
13	Marketing CRM App	Marketing	Track leads and marketing efforts with CRM objects	7/18/2025, 1:28 PM	Classic	✓
14	My Service Journey	NSIA App	Check-out new customer service capabilities	7/18/2025, 1:28 PM	Lightning	✓

To Add Navigation Items Search the items in the search bar(HandsMen Customer, HandsMen Order, Inventory, HandsMen Product, Reports, Dashboard, Account, Contact , Marketing Campaign) from the search bar and move it using the arrow button → Next.



To Add User Profiles:

Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.



Data Management - Fields

Creating Field in HandsMen Customer Object

To create fields in an object:

Go to setup → click on Object Manager → type object name(HandsMen Customer) in quick find bar→ click on the object.

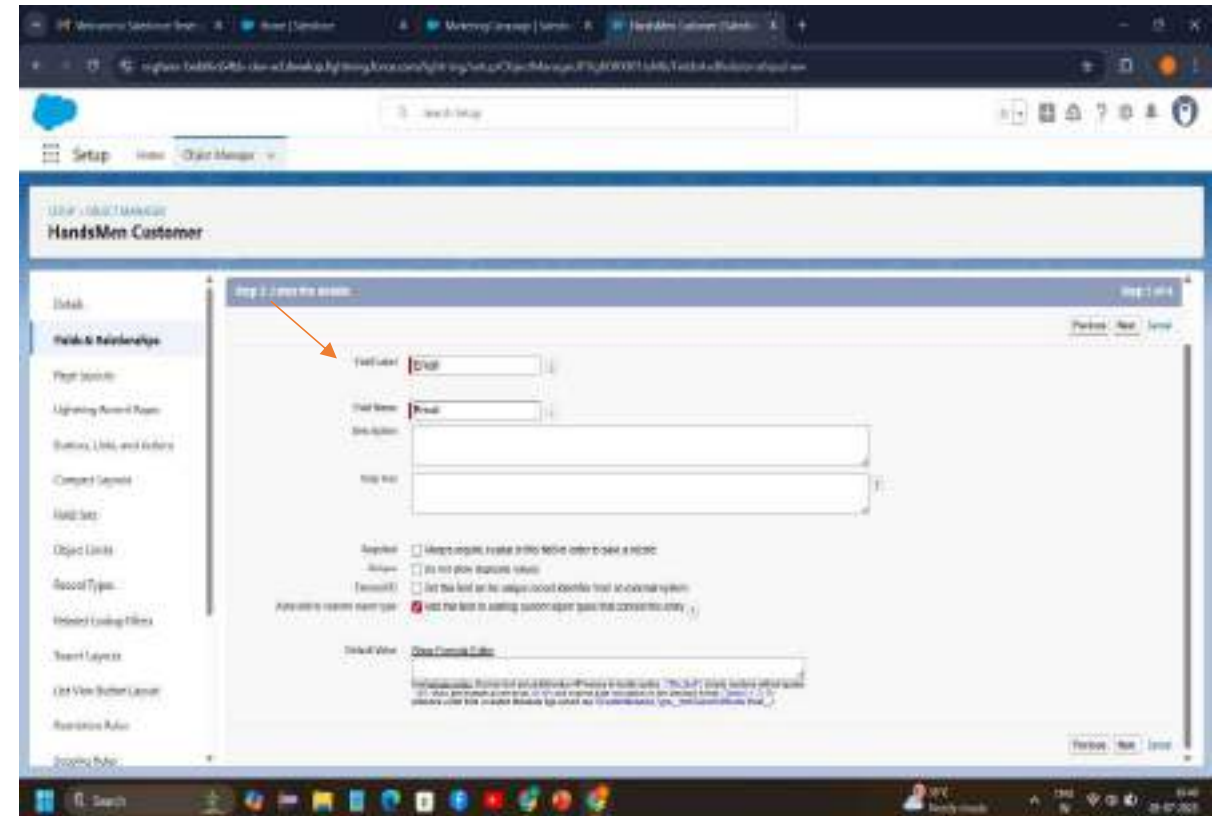
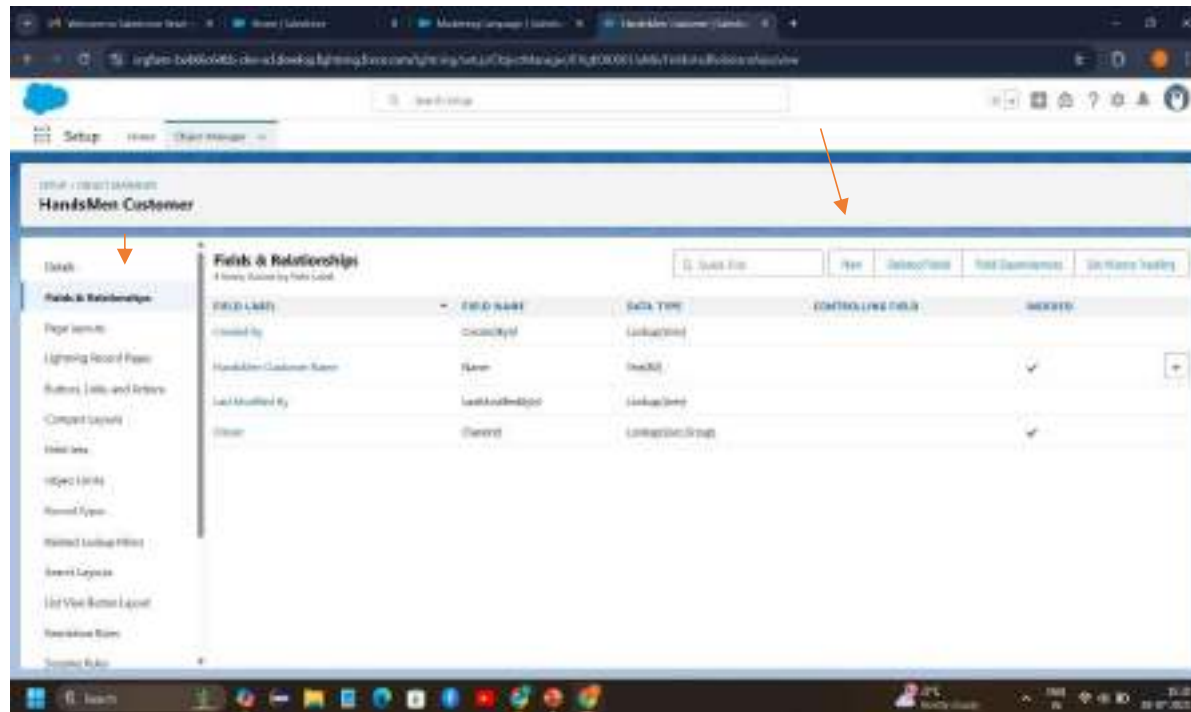
The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the text "Hands" entered. Below the search bar, there is a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains three rows of data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Customer	HandsMen_Customer__c	Custom Object		7/28/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		7/28/2025	✓
HandsMen Product	HandsMen_Product__c	Custom Object		7/28/2025	✓

Two orange arrows are present: one pointing to the search bar and another pointing to the "HandsMen Customer" row in the table.

Fill the above as following:
Field Label: Email
Field Name : gets auto generated
Click on Next → Next → Save and new.

Now click on “Fields & Relationships” → New

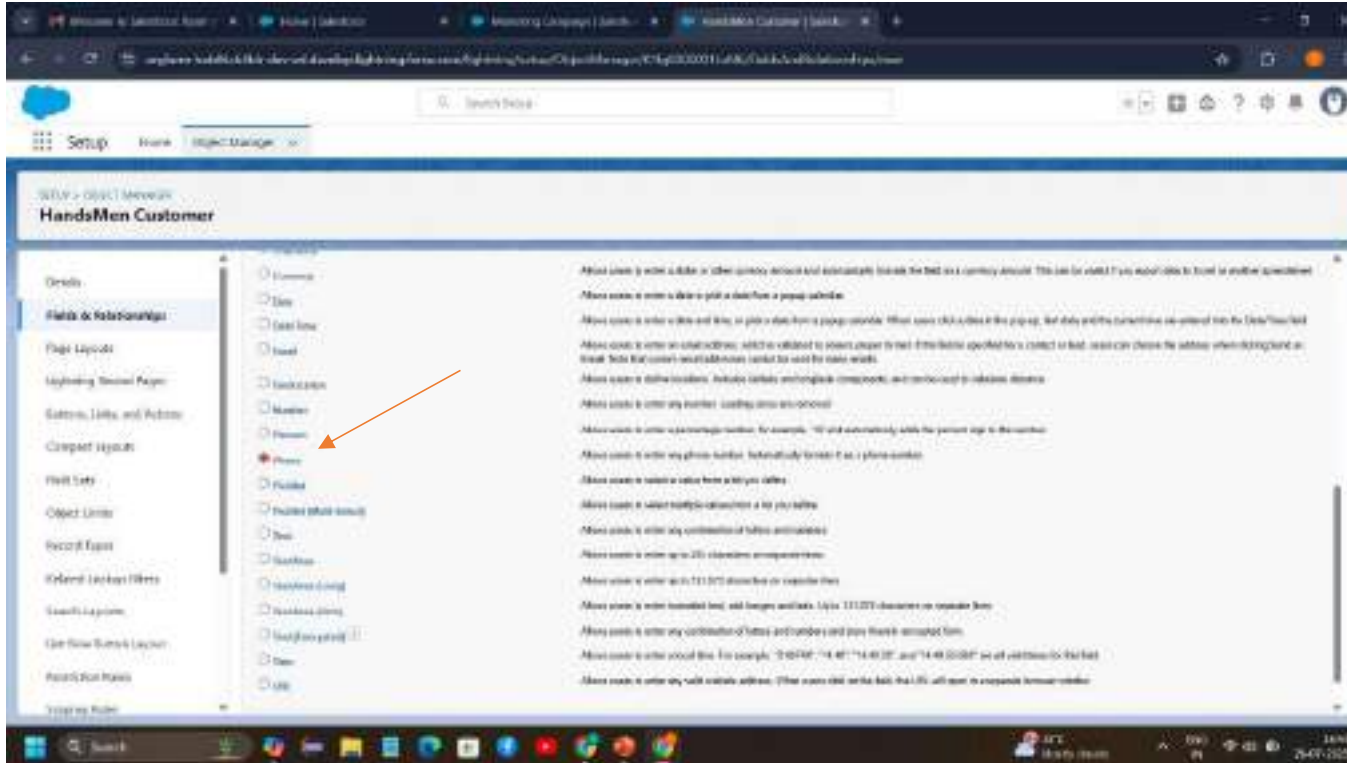


Creating Phone on HandsMen Customer Object

Go to setup → click on Object Manager → type object name(HandsMen Customer) in quick find bar→ click on the object.

Now click on “Fields & Relationships” → New.

Select Data type as “Phone” and click Next.

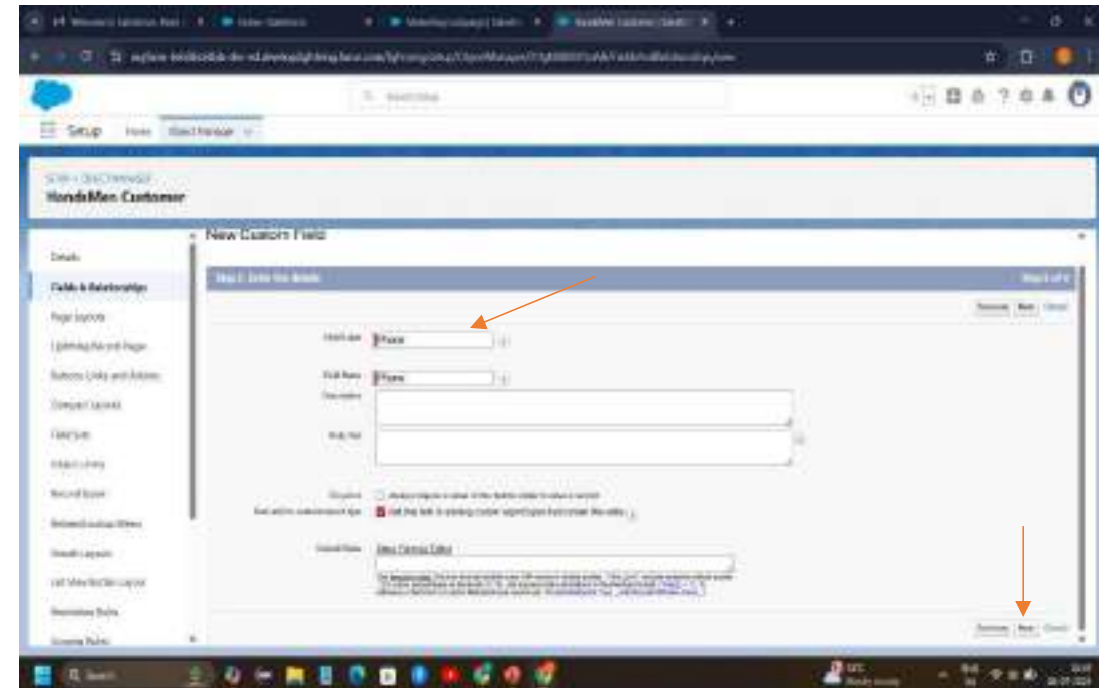


Fill the above as following:

Field Label: Phone.

Field Name : gets auto generated.

Click on Next → Next → Save and new.



Creating Picklist field on HandsMen Customer object.

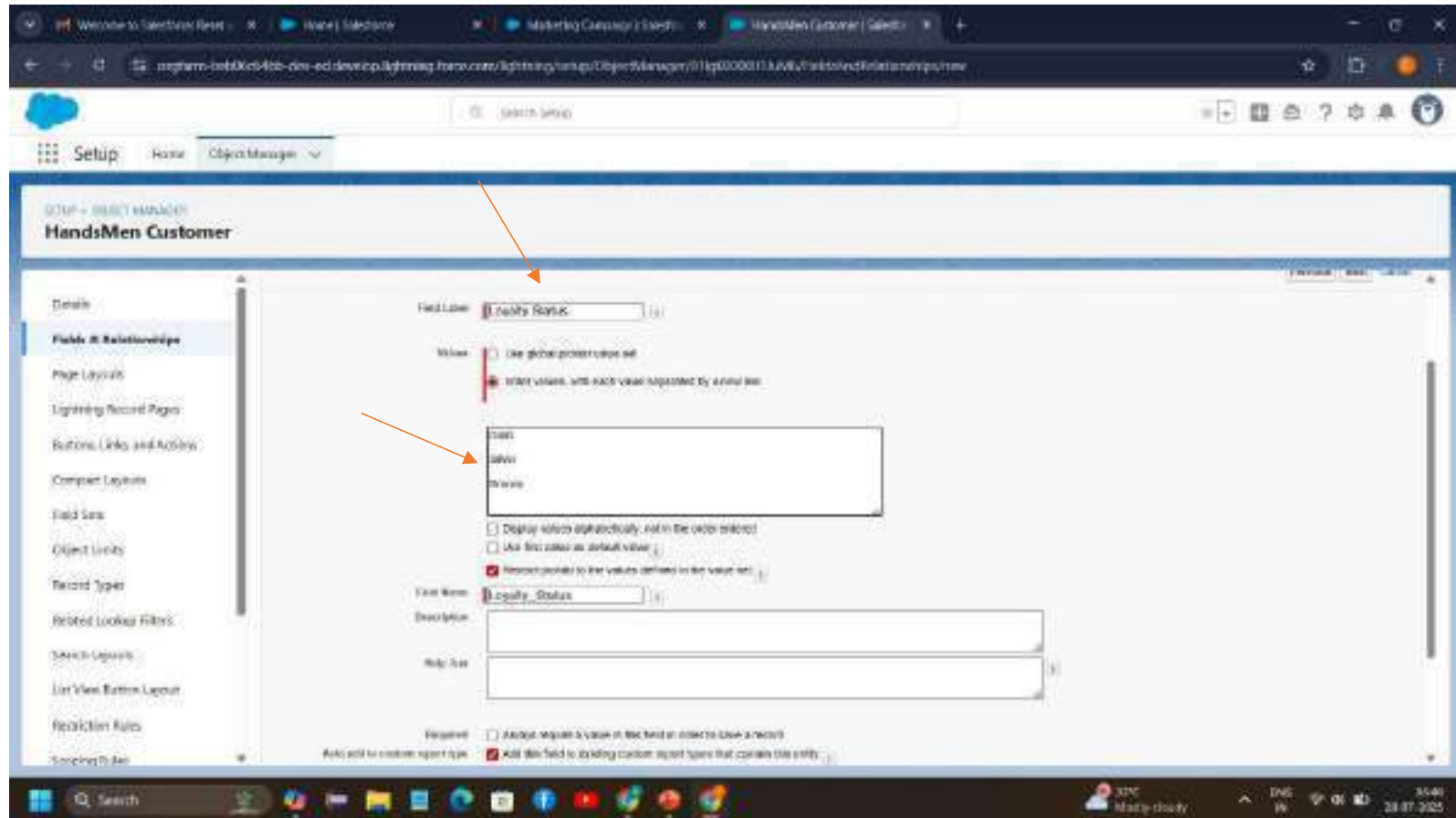
Go to setup → click on Object Manager → type object name(HandsMen Customer) in quick find bar→ click on the object.

Now click on “Fields & Relationships” → New.

Select Data type as “Picklist” and click Next.

Enter Field Label as “Loyalty Status”, under values select “Enter values, with each value separated by a new line” and enter values as shown below:

Gold
Silver
Bronze



Unit 1 : Creating Lookup Relationship between Marketing Campaign and HandsSome Customer

To Create a lookup relationship

Go to the setup page → click on object manager → type object name(Marketing Campaign) in the quick find bar→ click on the object.

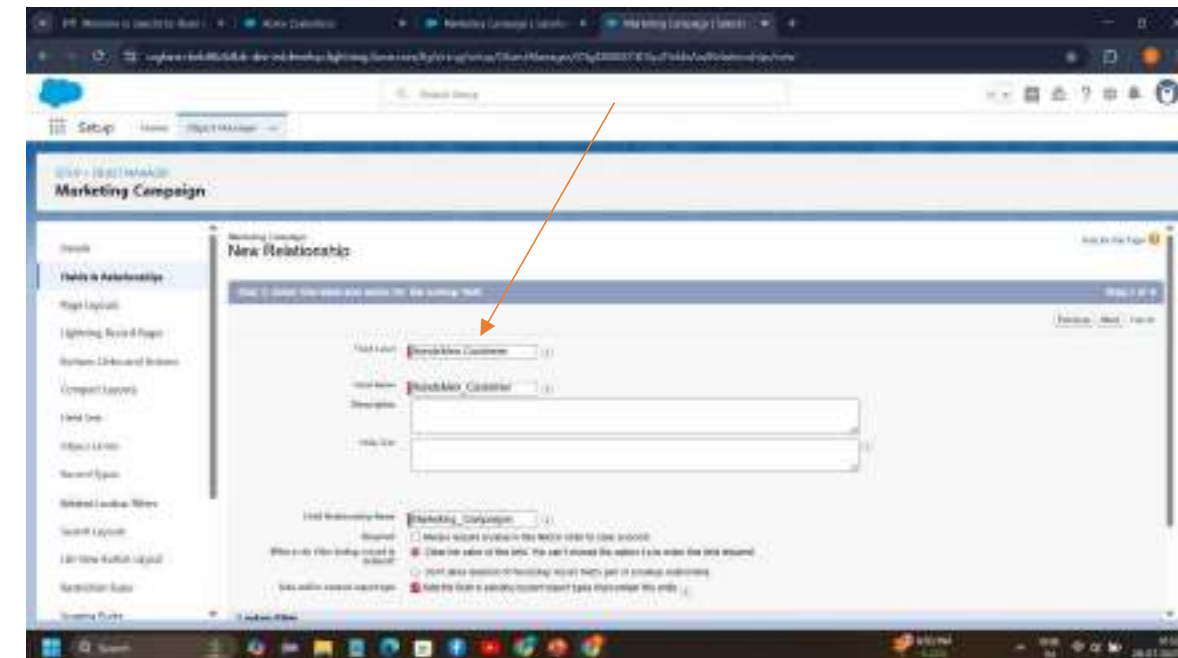
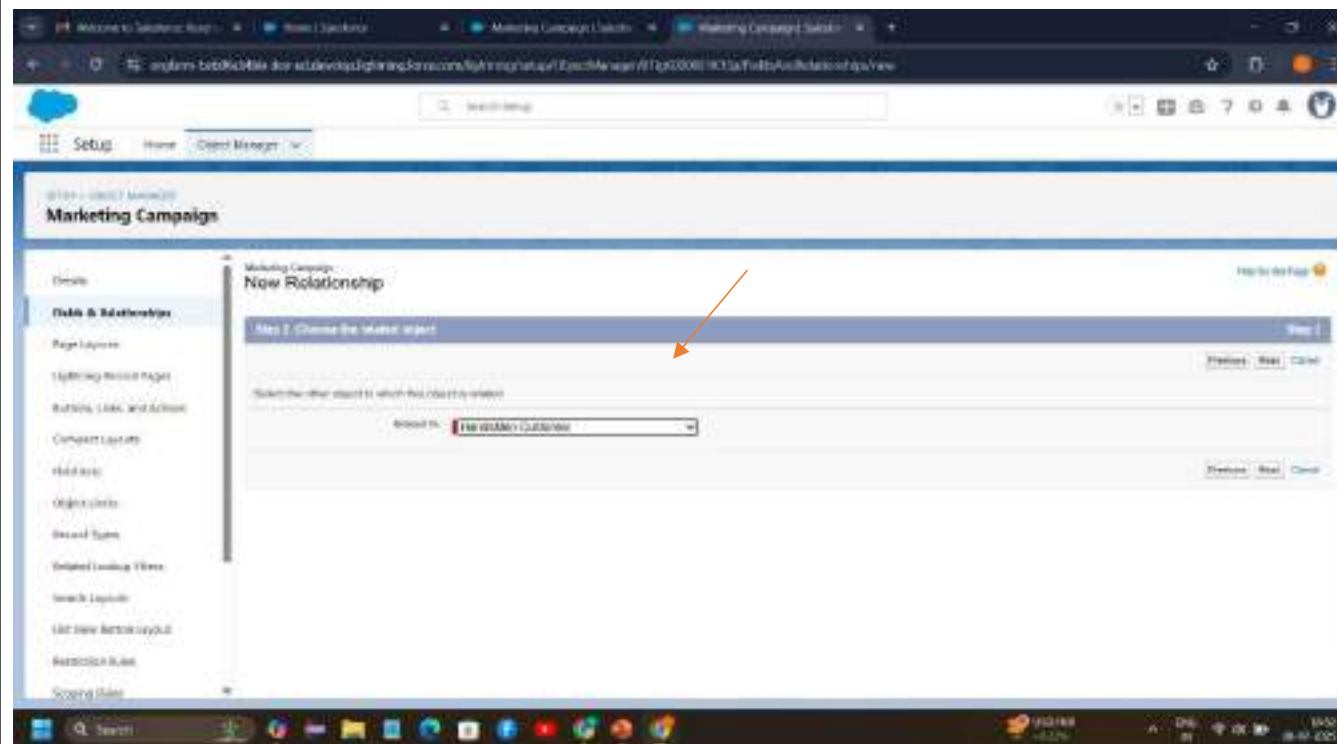
Click on fields & relationship → click on New.

Select “lookup relationship” as data type and click Next.

For field label related to: select “HandsMen Customer” object and click Next.

Give Field Label as “HandsMen Customer” and click Next.

Next → Next → Save



Unit 2 : Creating Lookup Relationship between HandsMen Product and HandsMen Order

To Create a lookup relationship

Go to the setup page → click on object manager → type object name(HandsMen Product) in the quick find bar→ click on the object.

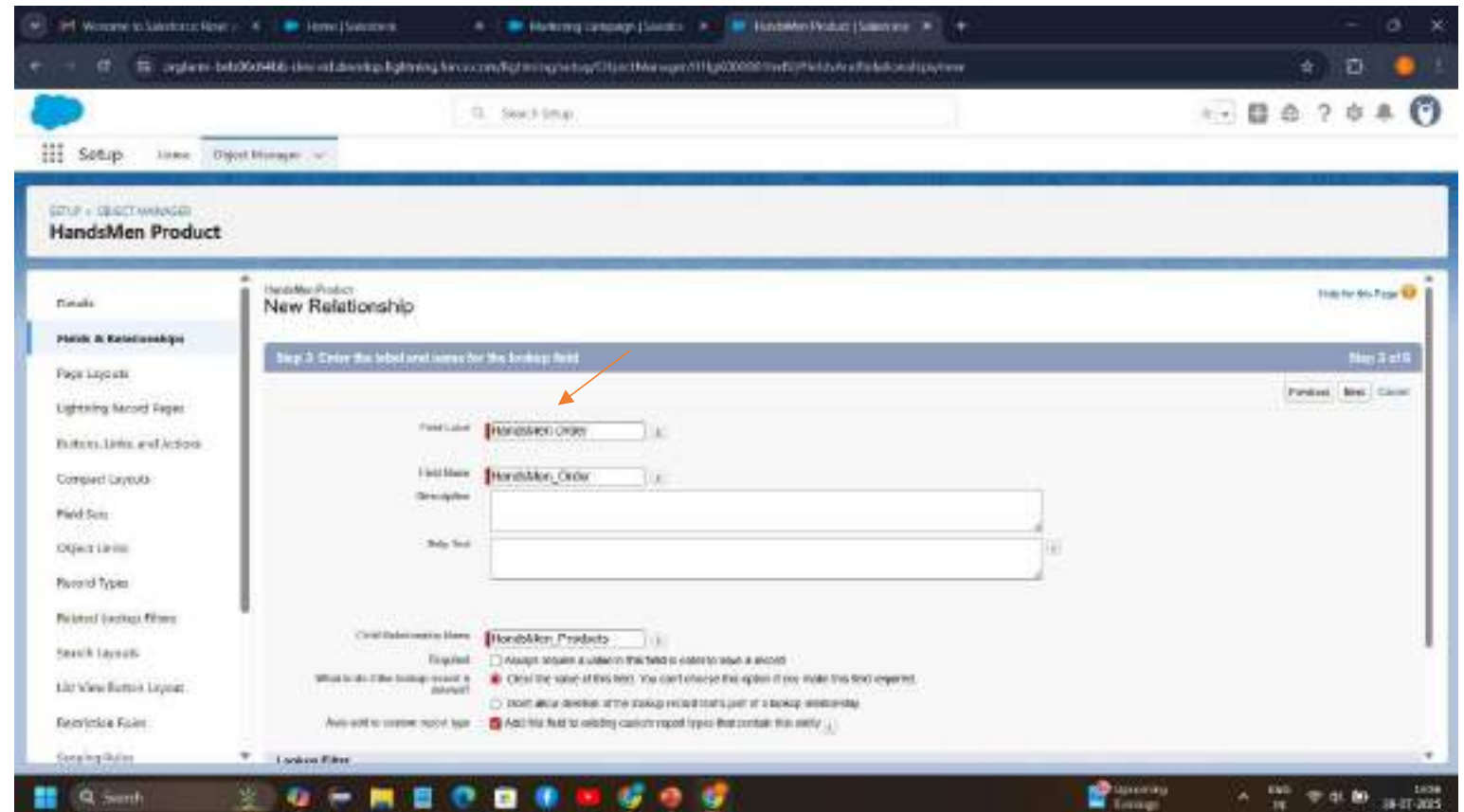
Click on fields & relationship → click on New.

Select “lookup relationship” as data type and click Next.

For field label related to: select “HandsMen Order” object and click Next.

Give Field Label as “Order” and click Next.

Next → Next → Save.



Unit 3 : Creating Lookup Relationship between HandsMen Order and HandsMen Customer

To Create a lookup relationship

Go to the setup page → click on object manager → type object name(HandsMen Order) in the quick find bar→ click on the object.

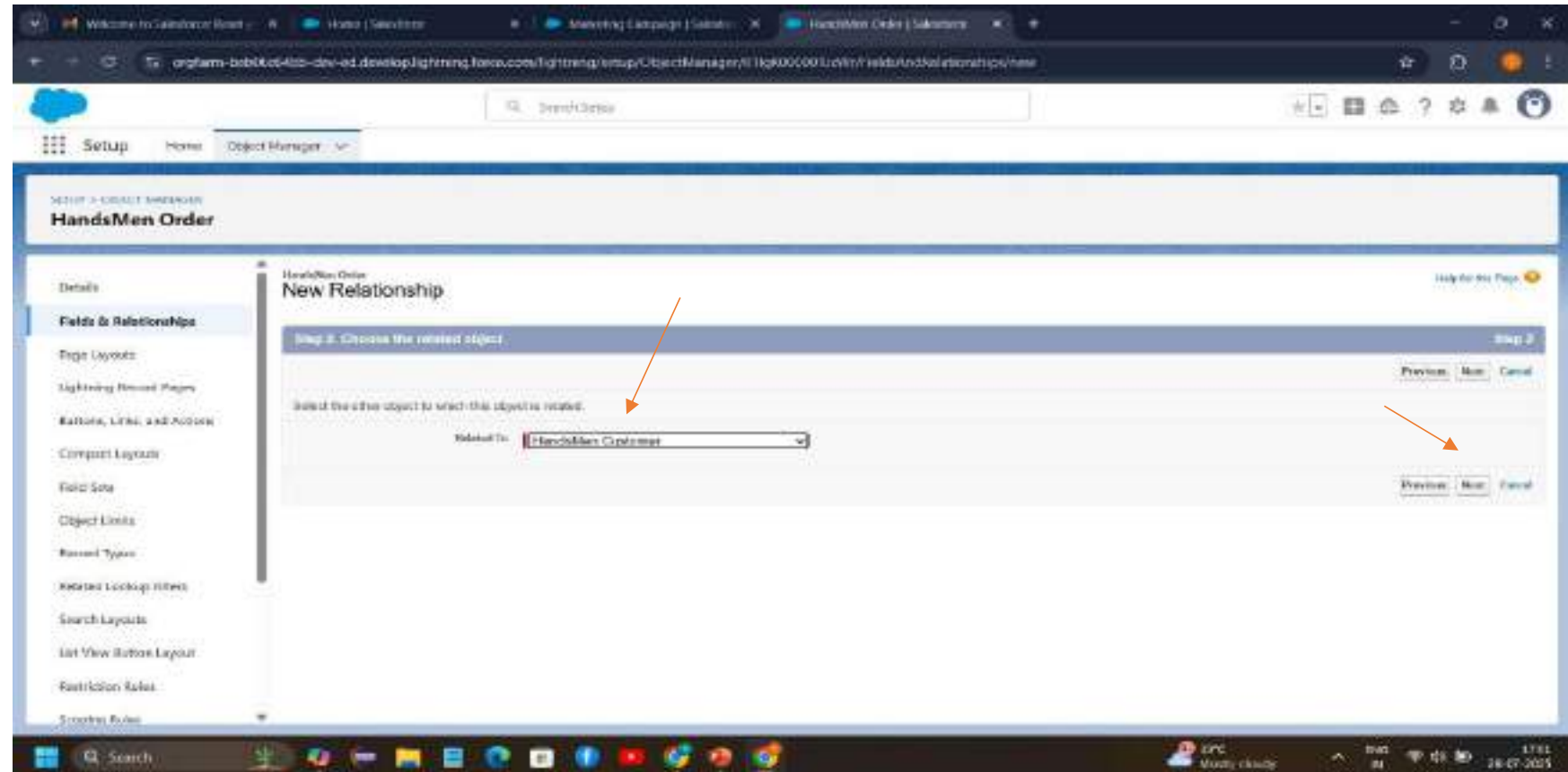
Click on fields & relationship → click on New.

Select “lookup relationship” as data type and click Next.

For field label related to: select “**HandsMen Customer**” object and click Next.

Give Field Label as “Customer” and click Next.

Next → Next → Save.



Unit 4 : Creating Master-Detail Relationship between Inventory and HandsSome Product

To Create a Master-Detail relationship

Go to the setup page → click on object manager → type object name(Inventory) in the quick find bar→ click on the object.

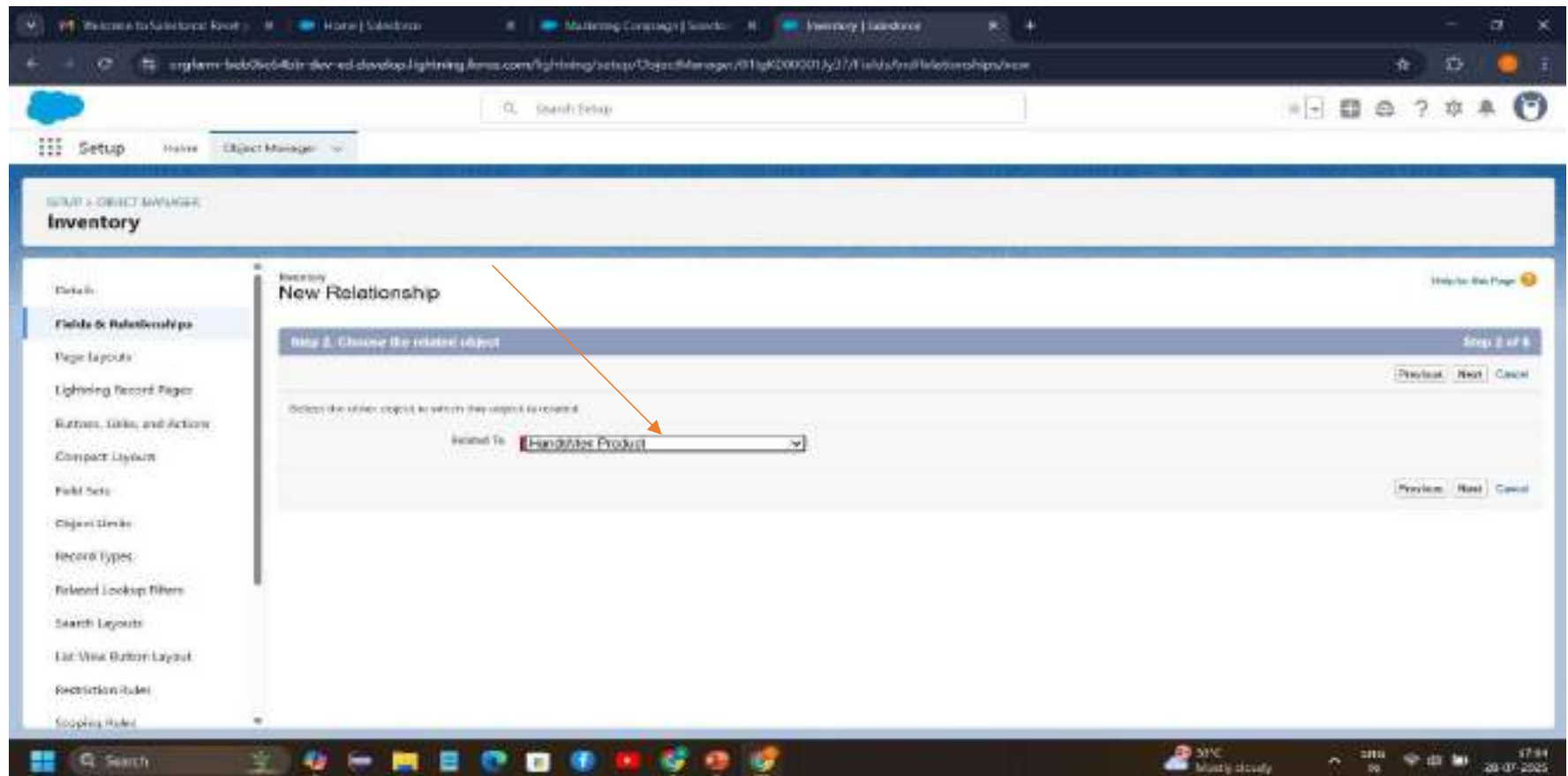
Click on fields & relationship → click on New.

Select “**Master-Detail** relationship” as data type and click Next.

For field label related to: select “**HandsMen Product**” object and click Next.

Give Field Label as “Product” and click Next.

Next → Next → Save.



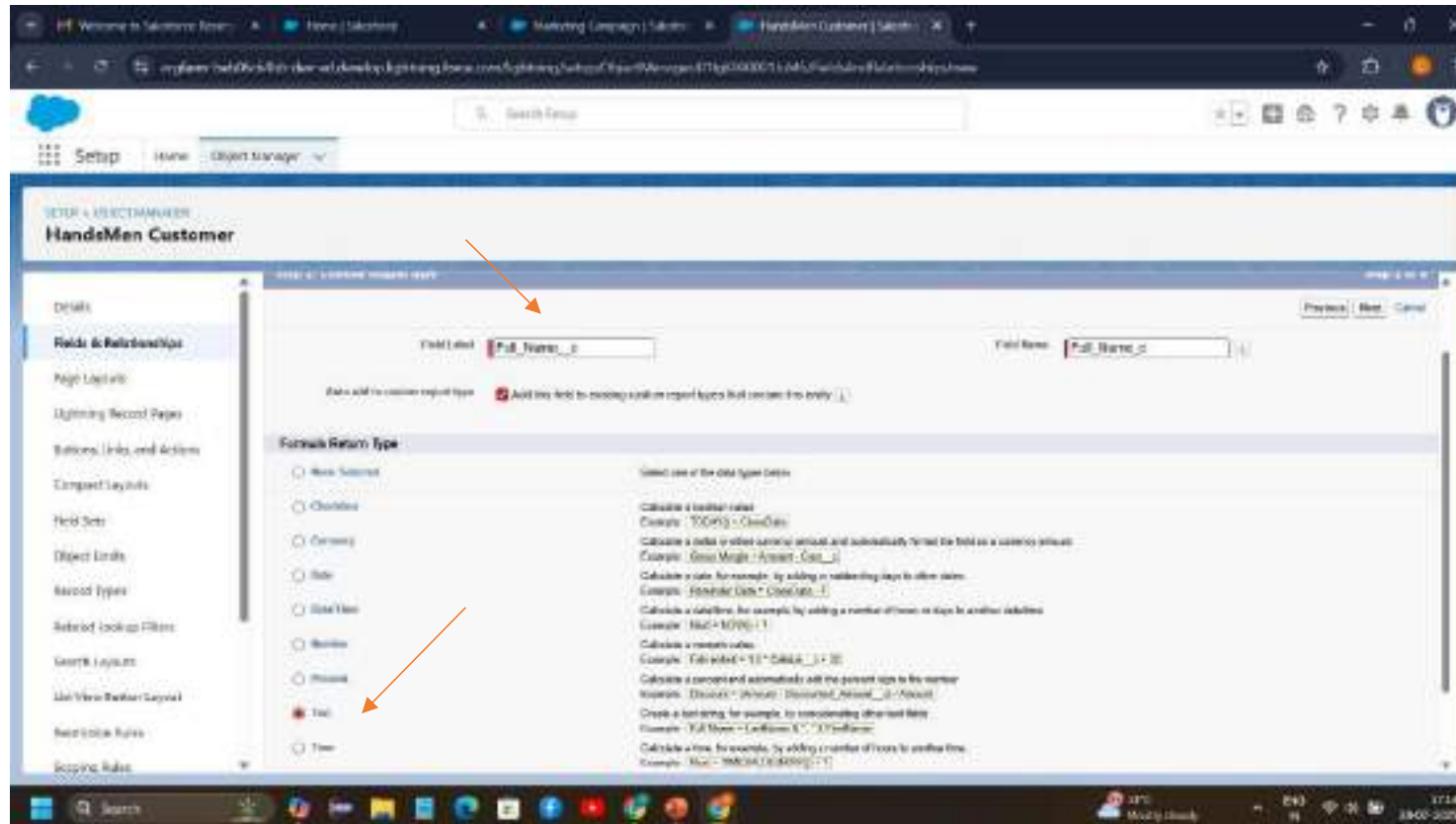
Formula Fields

Go to the setup page → click on object manager → type object name(HandsMen_Customer__c) in the quick find bar→ click on the object.

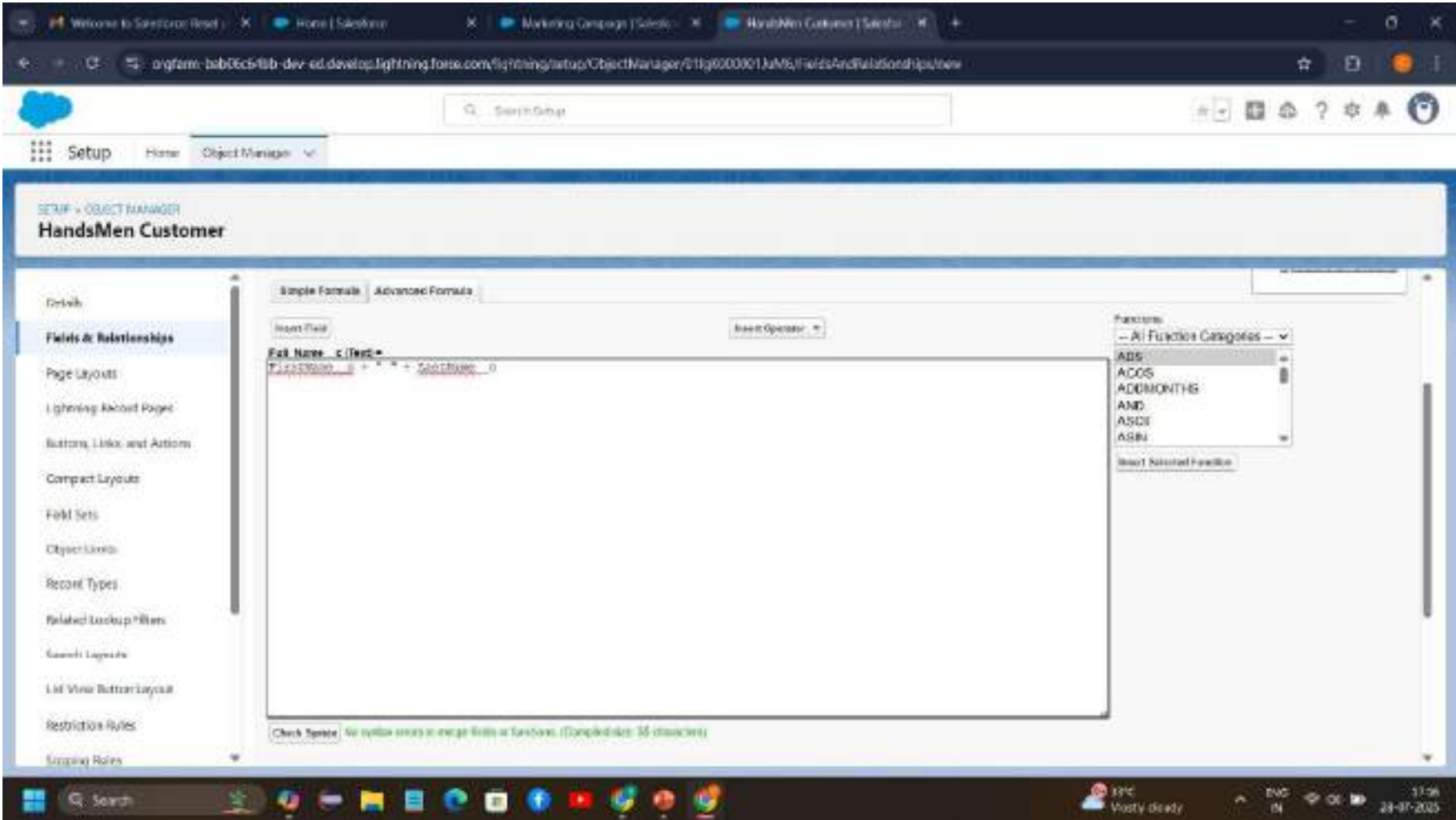
Click on fields & relationship → click on New.

Select Data type as “Formula” and click Next.

Give Field Label and Field Name as “Full_Name__c” and select formula return type as “Text” and click next.



Under Advanced Formula write down the formula and click “Check Syntax” and Next→ Next→ Save & New.



Object Name: HandsMen Customer__c

Type: Custom object

Description: Stores customer details

Key fields:

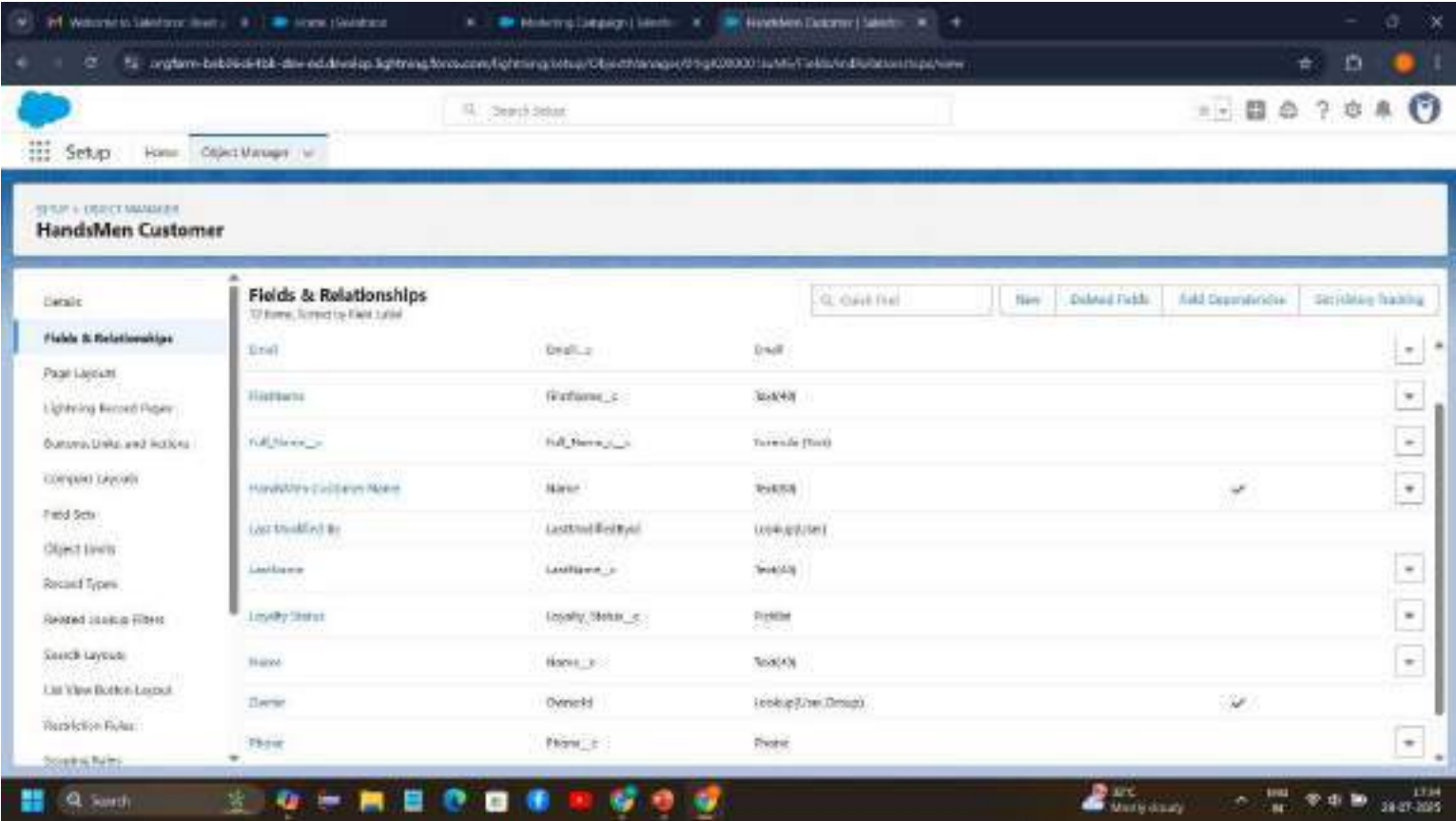
Name (Record Name),

Email (Email),

Phone (Phone),

Loyalty_Status__c (Picklist: Bronze, Gold, Silver) [Loyalty status field is already created in previous activity do not create it again,

Total_Purchases__c (Number)



Object Name: HandsMen Product__c

Type: Custom Object

Description: Stores product catalog

Key Fields: Name (Record Name),

SKU (Text),

Price (Currency),

Stock_Quantity__c (Number)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
HandsMen Product Name	Name	Text(80)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name__c	Text Area(255)		
Order	Order__c	Lookup(HandsMen Order)		✓
Owner	OwnerId	Lookup(User Group)		✓
Price	Price__c	Currency(15, 0)		
SKU	SKU__c	Text(40)		
Stock_Quantity	Stock_Quantity__c	Number(16, 0)		

Object Name: HandsMen Order__c

Type: Custom Object

Description: Stores customer orders

Key Fields: Order_Number (Record Name),

Status (Picklist: Pending, Confirmed, Rejection),

Quantity__c (Number),

Total_Amount__c(Number)

The screenshot displays the Salesforce Object Manager interface for the 'HandsMen Order' custom object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Fields, Search Layouts, List View Button Layout, Validation Rules, and Sharing Rules. The main content area is titled 'HandsMen Order' and includes a 'Fields & Relationships' section with a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below this is a table listing the fields and their relationships.

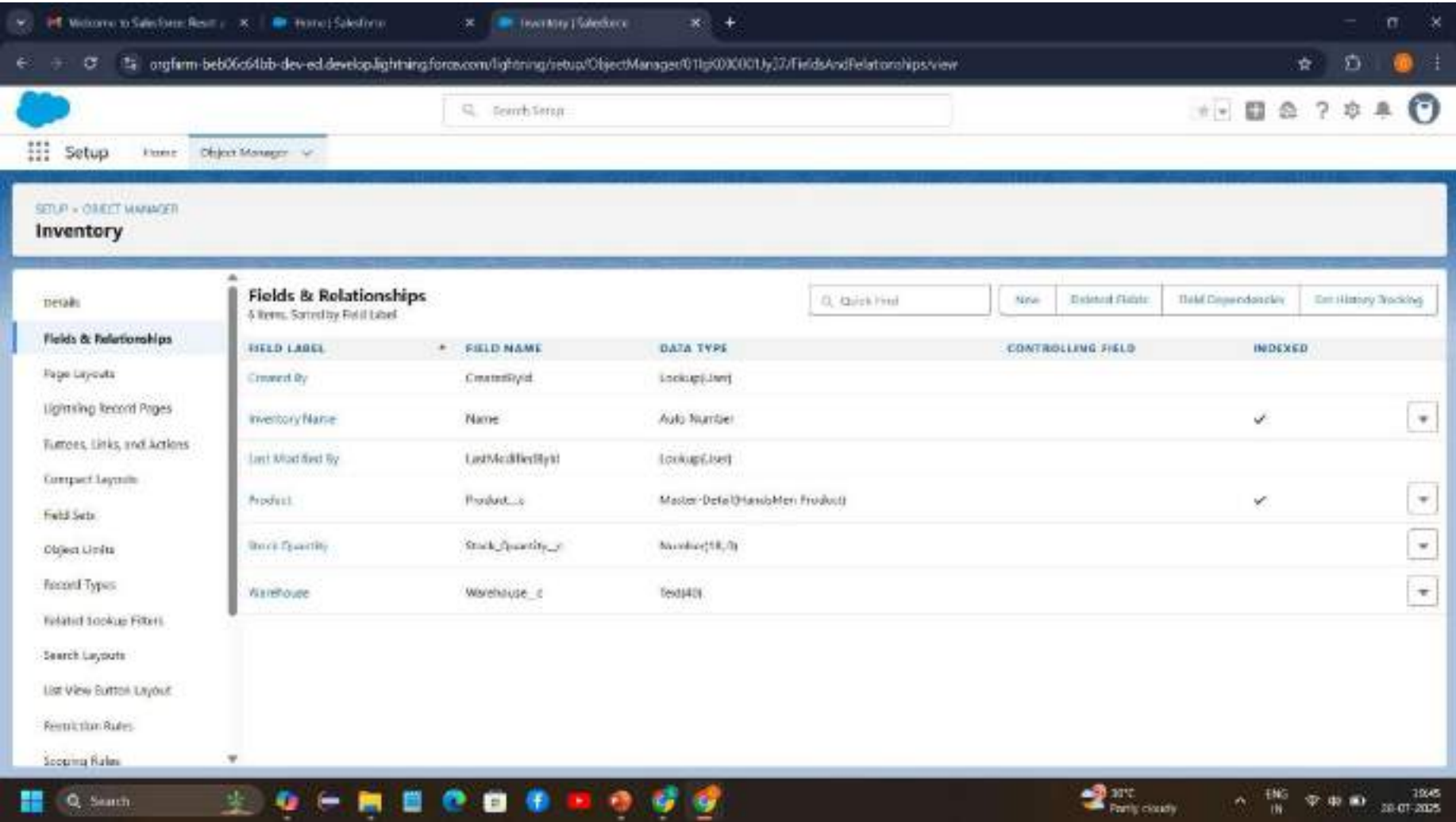
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(HandsMen Customer)		✓
HandsMen Order Name	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Quantity	Quantity__c	Number(18, 0)		
Status	Status__c	Picklist		
Total Amount	Total_Amount__c	Currency(18, 0)		

Object Name: Inventory__c

Type: Custom Object

Description: Tracks inventory levels

Key Fields: Auto Number (Record Name),
Warehouse (Text),
Stock_Quantity__c (Number)



Object Name: Marketing_Campaign__c

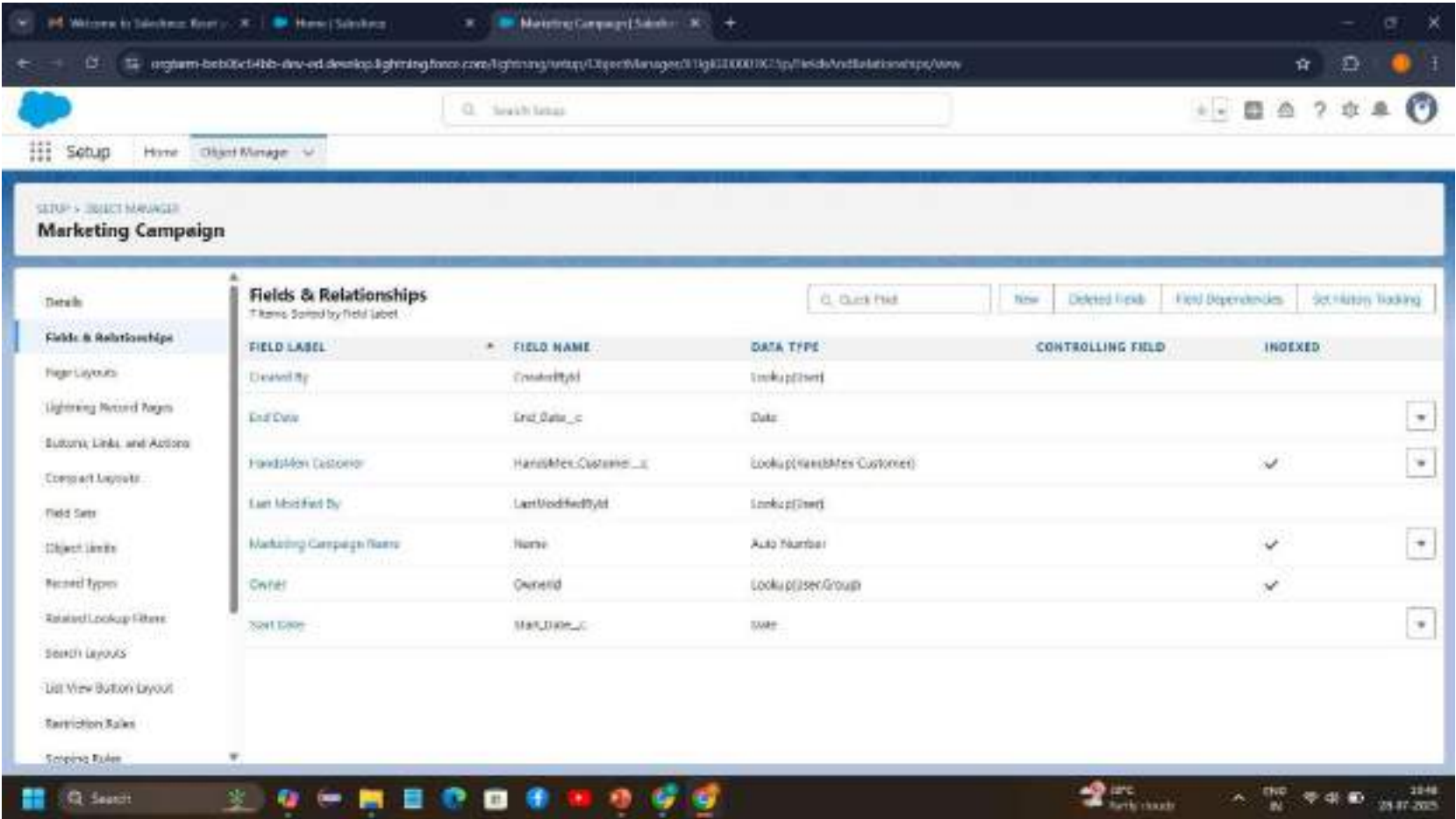
Type: Custom Object

Description: Manages promotions & campaigns

Key Fields:Campaign_Name (Record Name),

Start_Date (Date),

End_Date (Date)



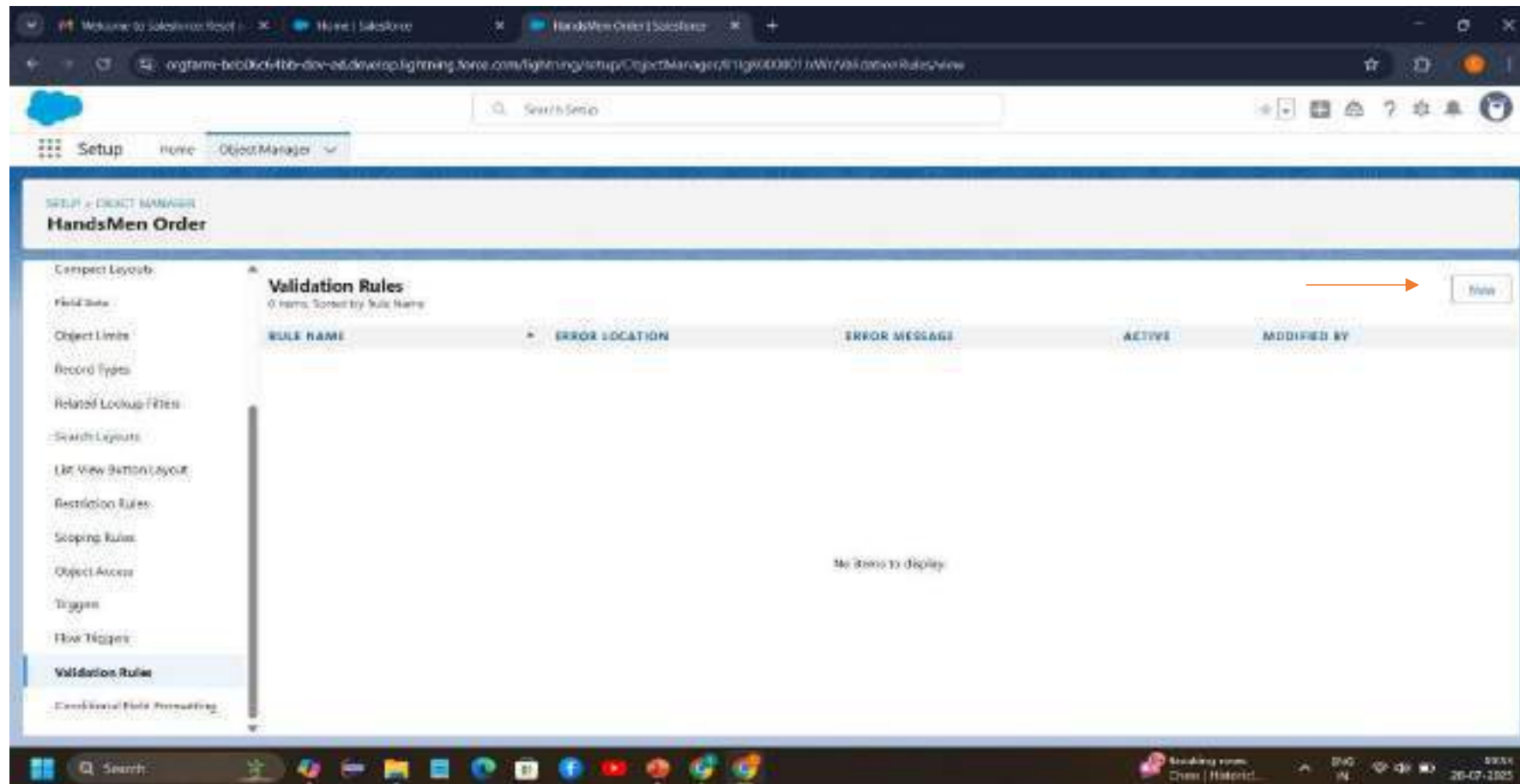
The screenshot shows the Salesforce Lightning Setup interface for the 'Marketing Campaign' custom object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Sharing Rules. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Created By, End Date, HandledBy Customer, Last Modified By, Marketing Campaign Name, Owner, and Sort Date. The 'Marketing Campaign Name' field is highlighted in green, indicating it is the record name.

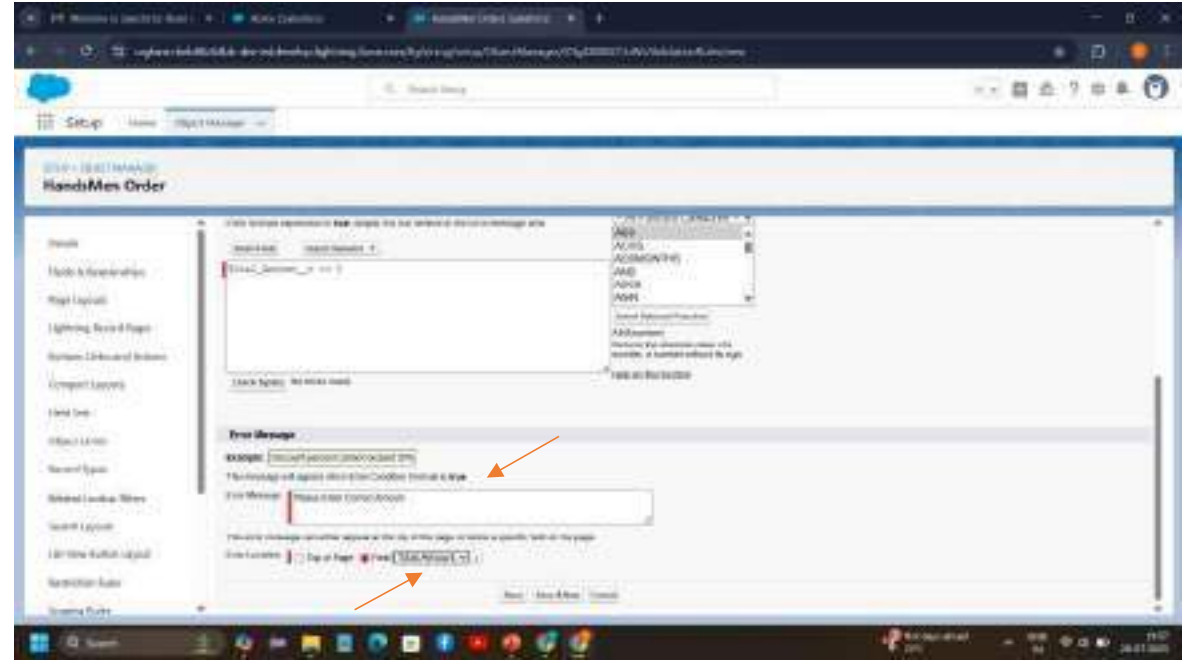
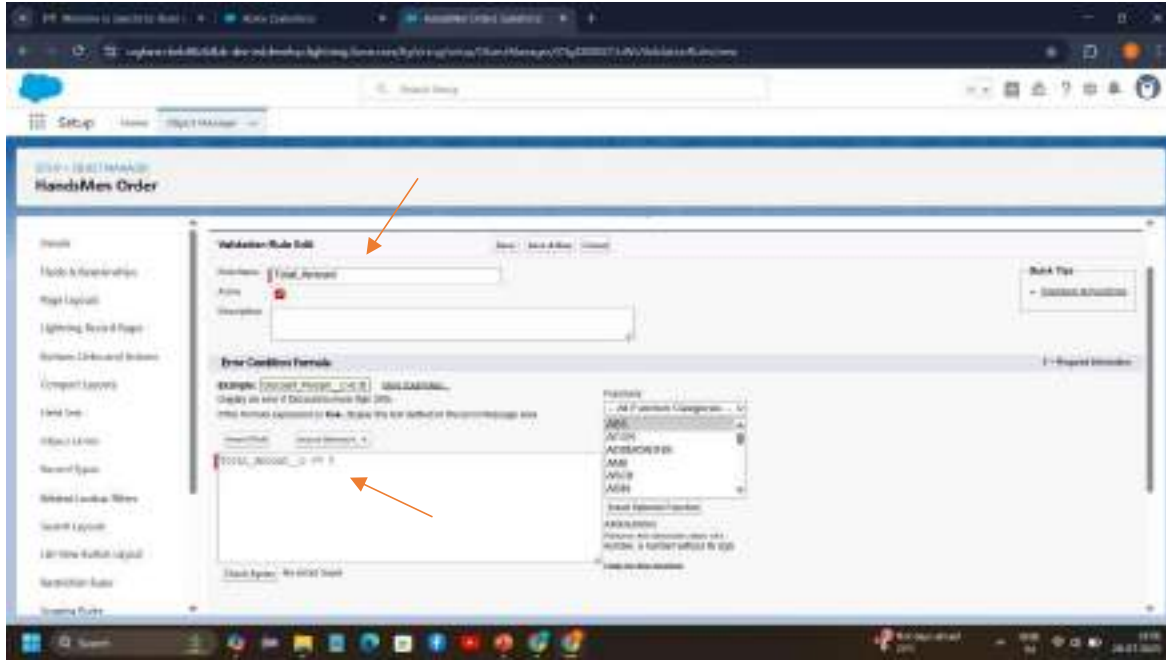
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup (User)		
End Date	End_Date__c	Date		
HandledBy Customer	HandledByCustomer__c	Lookup (HandledBy Customer)		✓
Last Modified By	LastModifiedBy	Lookup (User)		
Marketing Campaign Name	Name	Auto Number		✓
Owner	OwnerId	Lookup (User Group)		✓
Sort Date	Sort_Date__c	Date		

Data Configuration

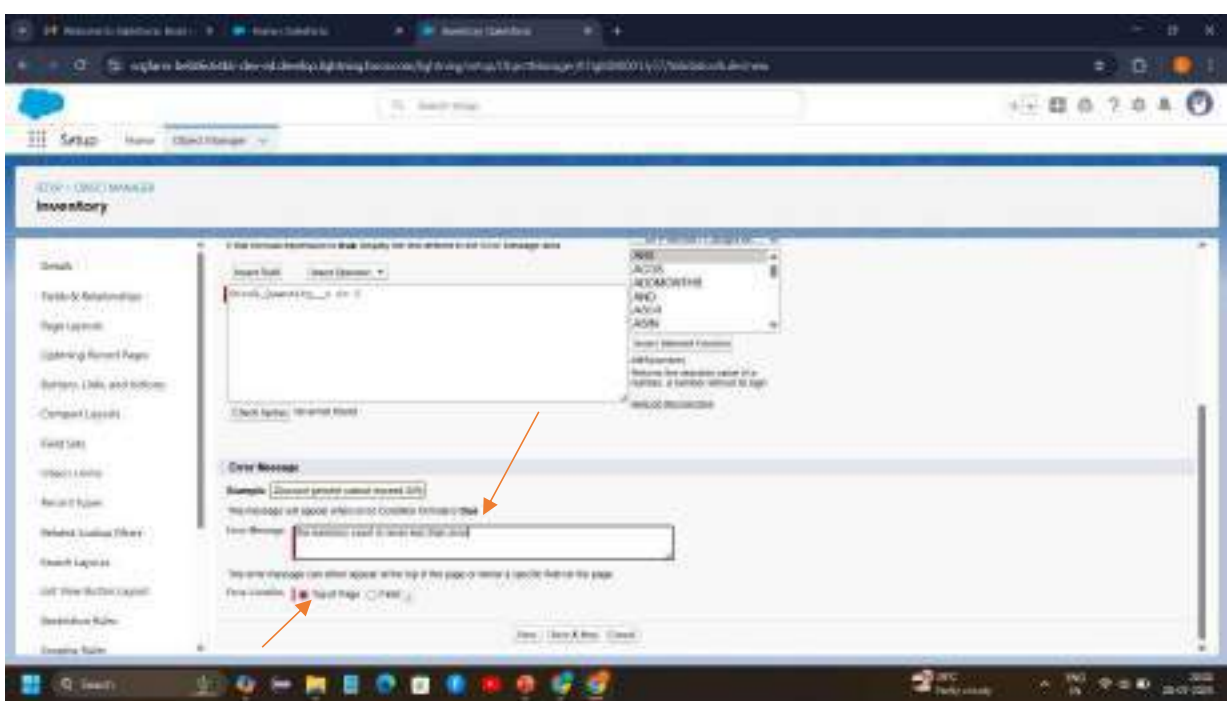
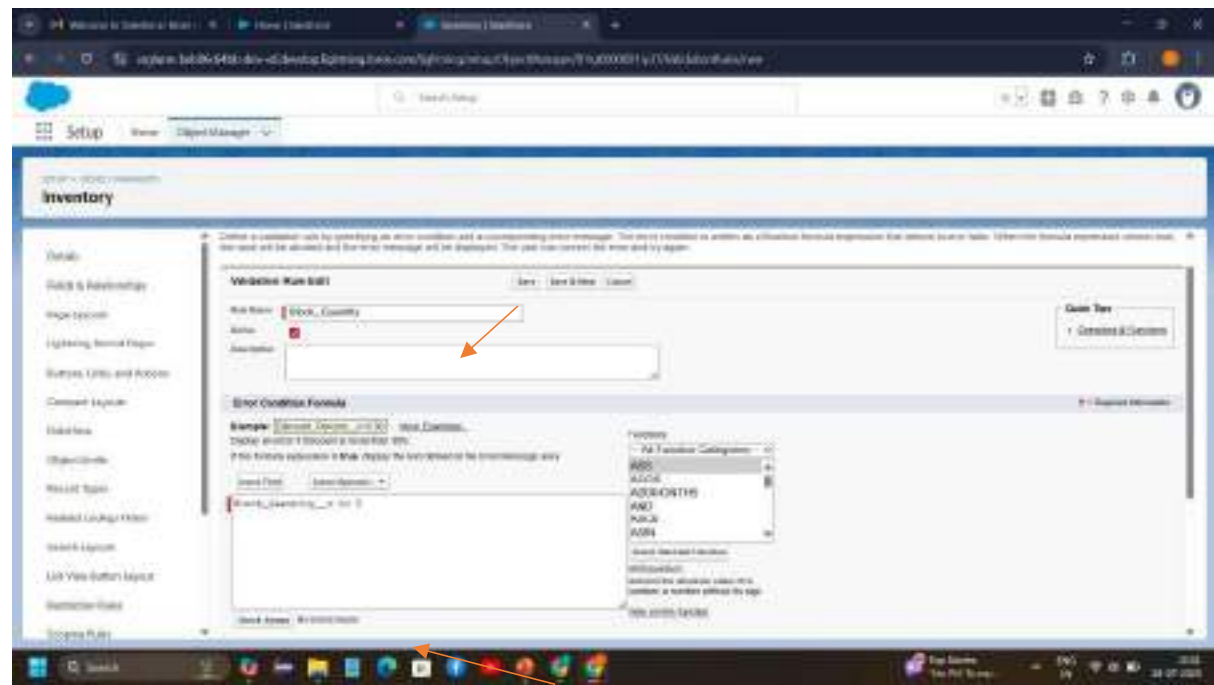
Activity 1 : Creating the validation rule

Go to setup → click on Object Manager → type object name(**HandsMen Order__c**) in quick find bar → click on the object.
Click on the validation rule → click New.





Create One more Validation rule for Inventory object.
Enter Rule name as “Stock Quantity “.
Insert the Error Condition Formula as : -
 $Stock_Quantity_c \leq 0$
Enter the Error Message as “ the inventory count is never less than zero.”, select the Error location as Top of Page and click Save.



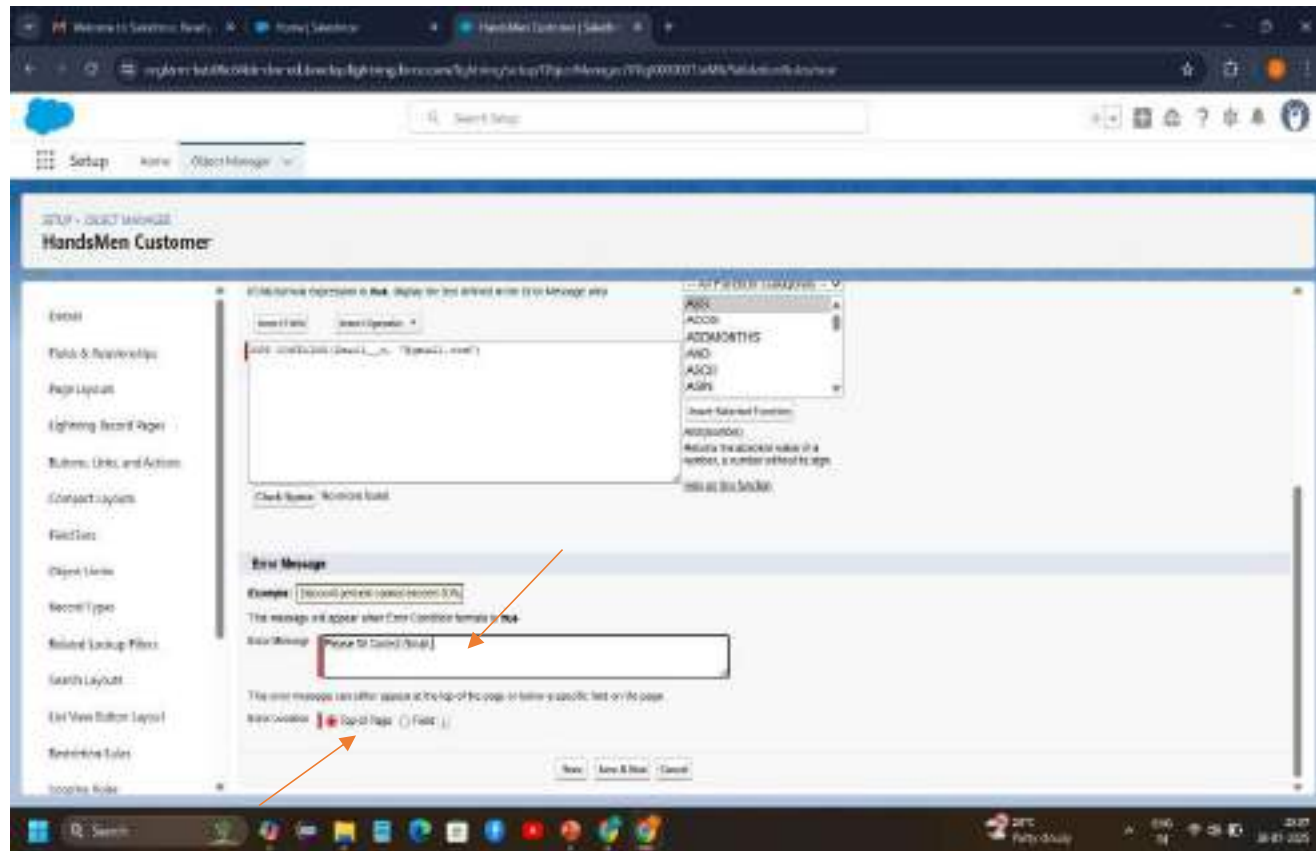
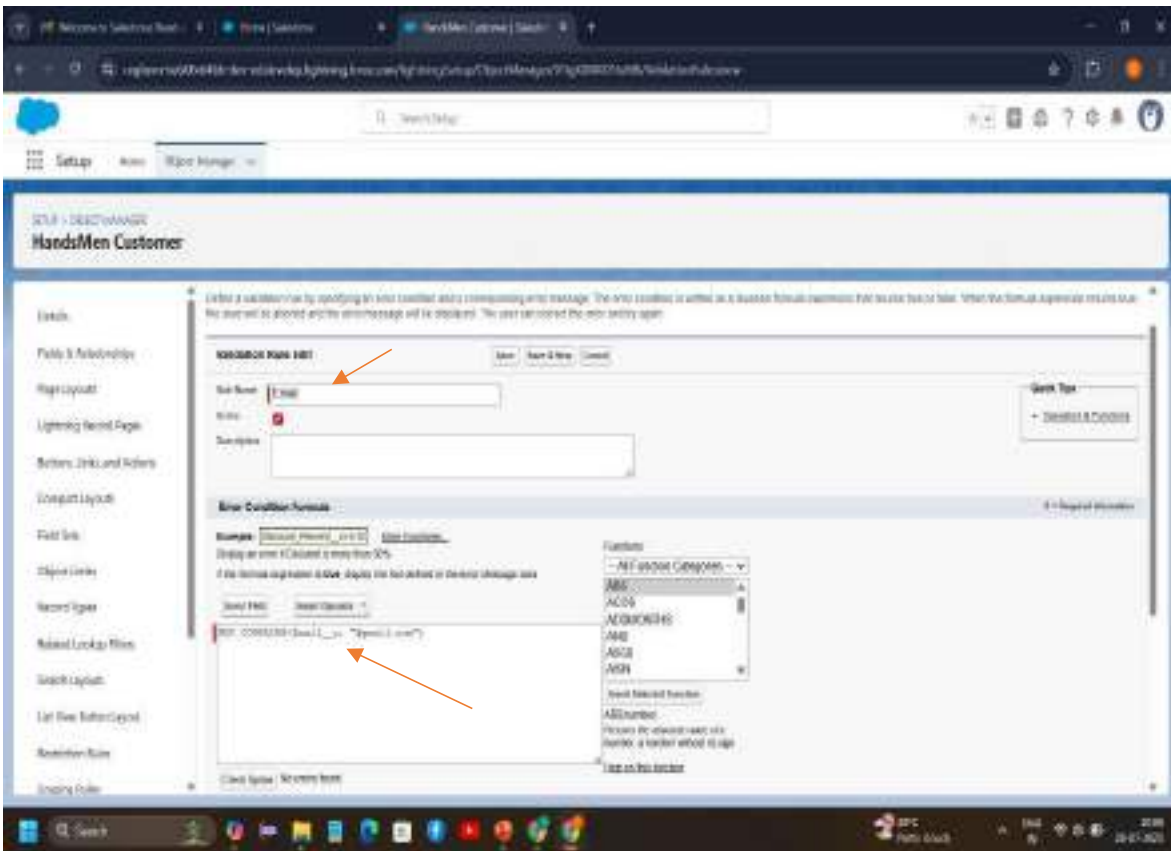
Create Validation rule for HandsMen Customer object.

Enter Rule name as “Email”.

Insert the Error Condition Formula as :-

NOT CONTAINS(Email, "@gmail.com")

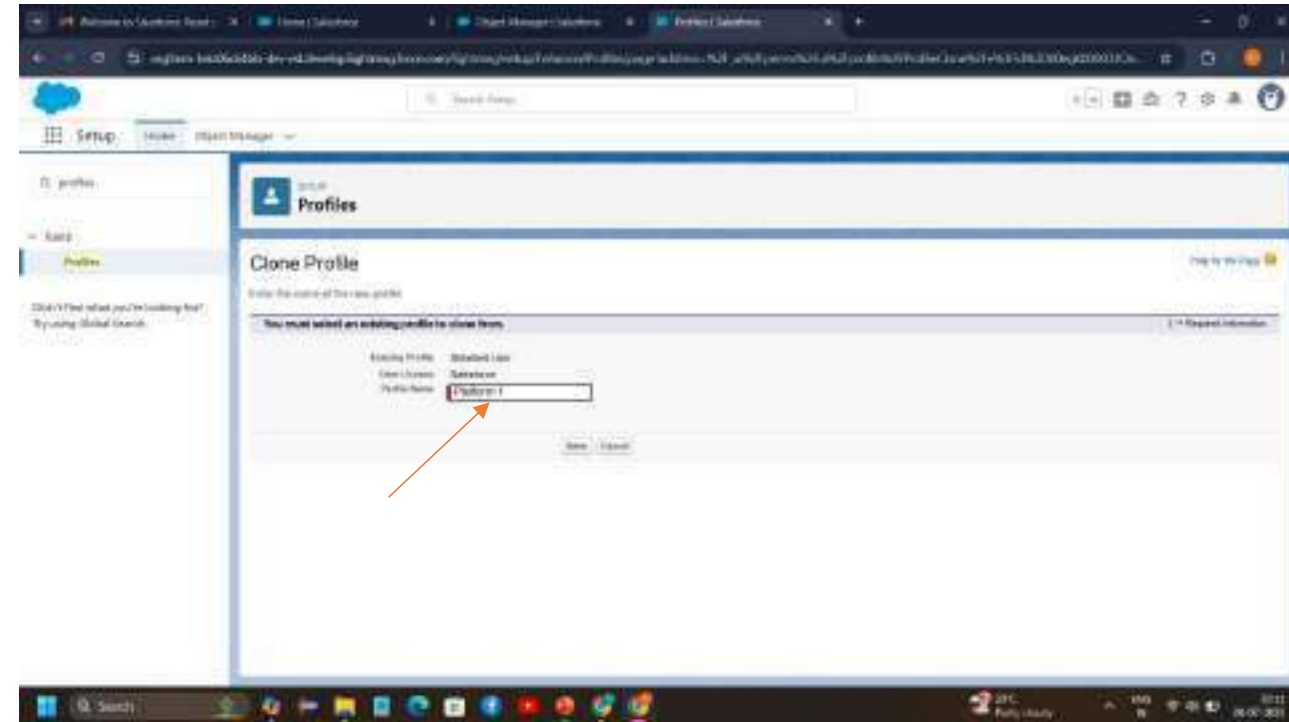
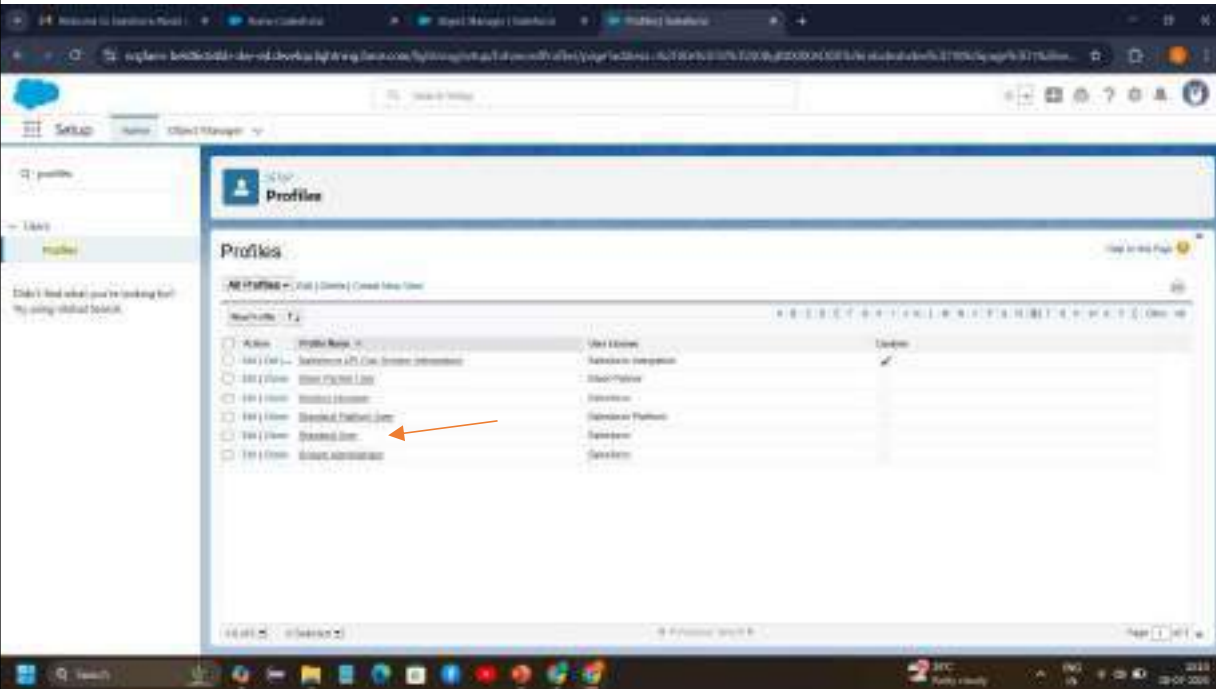
Enter the Error Message as “Please fill Correct Gmail”, select the Error location as Top of Page and click Save.



Profile - Sales

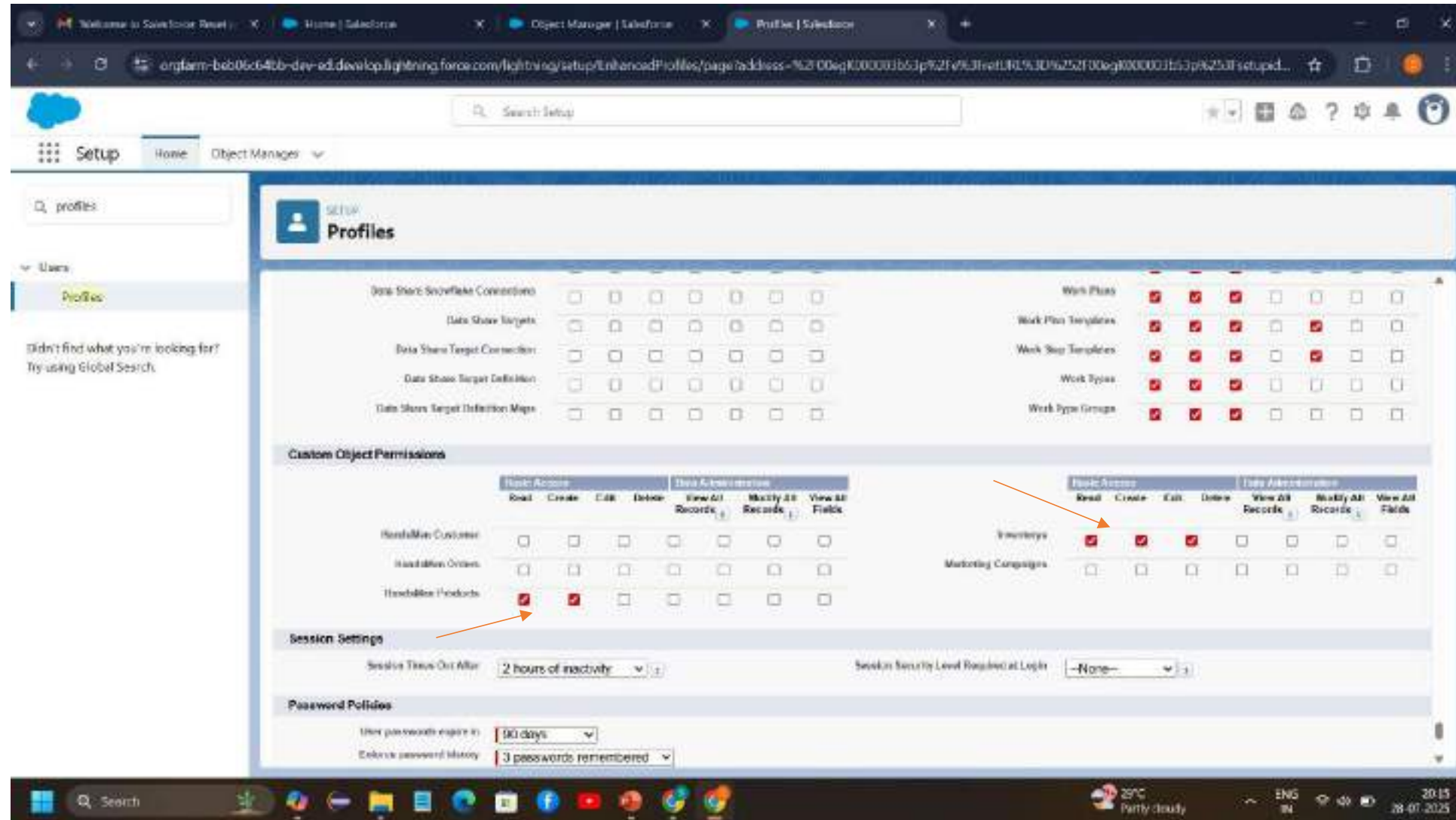
Creating Profile

Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard user) → enter profile name (Platform 1) → Save.



While still on the profile page, then click Edit.

Scroll down to Custom Object Permissions and Give access permissions for HandsMen products and Inventory objects.



Data Security - Roles

Role - Sales

Creating Sales Manager Role:

Go to quick find → Search for Roles → click on set up roles.

The screenshot shows the Salesforce Setup Roles page. The left sidebar contains a search bar with 'roles' entered and a list of categories: Users, Roles (selected), Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Understanding Roles' and includes a 'Sample Role Hierarchy' section. This section displays a hierarchical diagram of roles: Executive Staff (CEO, President, CFO, VP Sales) at the top, followed by Western Sales Director, Eastern Sales Director, and International Sales Director. Below these are various Sales Rep roles (e.g., Western Sales Rep, Eastern Sales Rep, International Sales Rep). To the right of the diagram are three text boxes explaining the permissions for each level. At the bottom right of the main content area, there is a 'Set Up Roles' button, which is highlighted by an orange arrow. Below this button is a checkbox labeled 'Don't show this page again'.

Welcome to Salesforce Setup | Roles | Salesforce | Object Manager | Salesforce | Roles | Salesforce

Search Setup

Setup Home Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

Executive Staff
CEO, President, CFO, VP Sales

* View & edit data, roll up forecasts, & generate reports for all users below.
* Can't access data of other Executive Staff

Western Sales Director
Director of W. Sales

* View & edit data, roll up forecasts, & generate reports for all users directly below.
* Can't access data of users above or at same level

Eastern Sales Director
Director of E. Sales

* View & edit data, roll up forecasts, & generate reports only for users under.
* Can't access data of users above or at same level

International Sales Director
Director of Int'l Sales

* View & edit data, roll up forecasts, & generate reports only for users under.
* Can't access data of users above or at same level

Western Sales Rep
QA Sales Rep
CRM Sales Rep

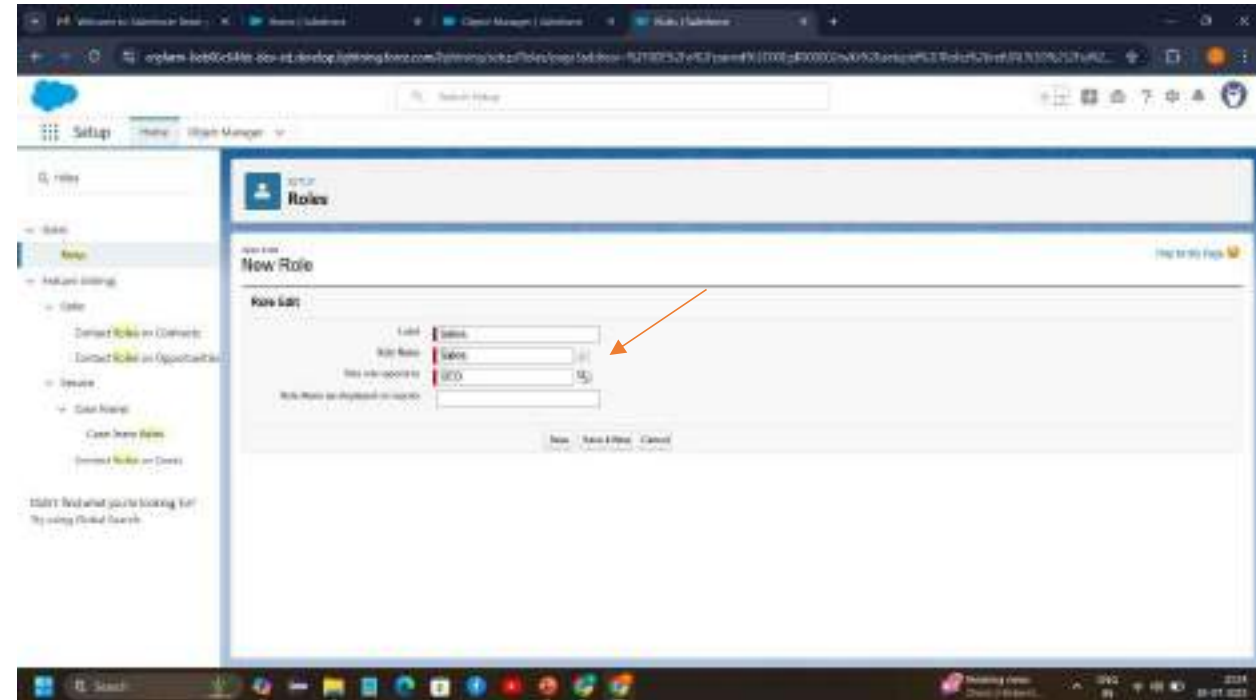
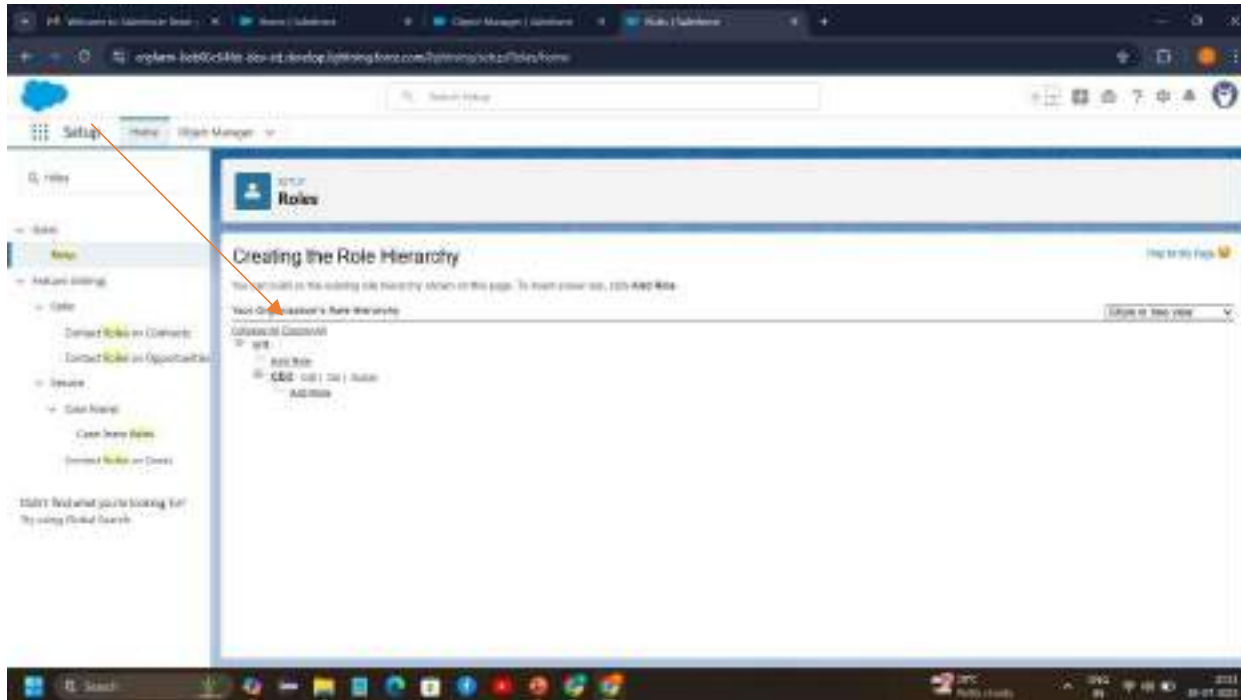
Eastern Sales Rep
NY Sales Rep
BA Sales Rep

International Sales Rep
Asian Sales Rep
European Sales Rep

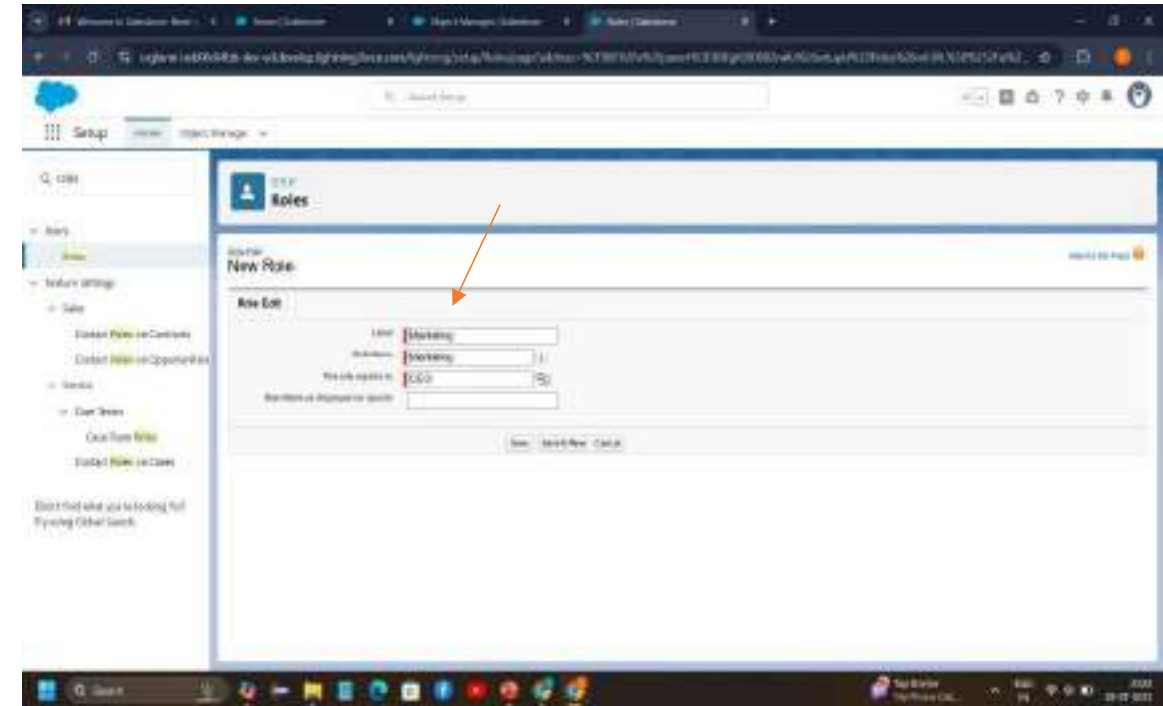
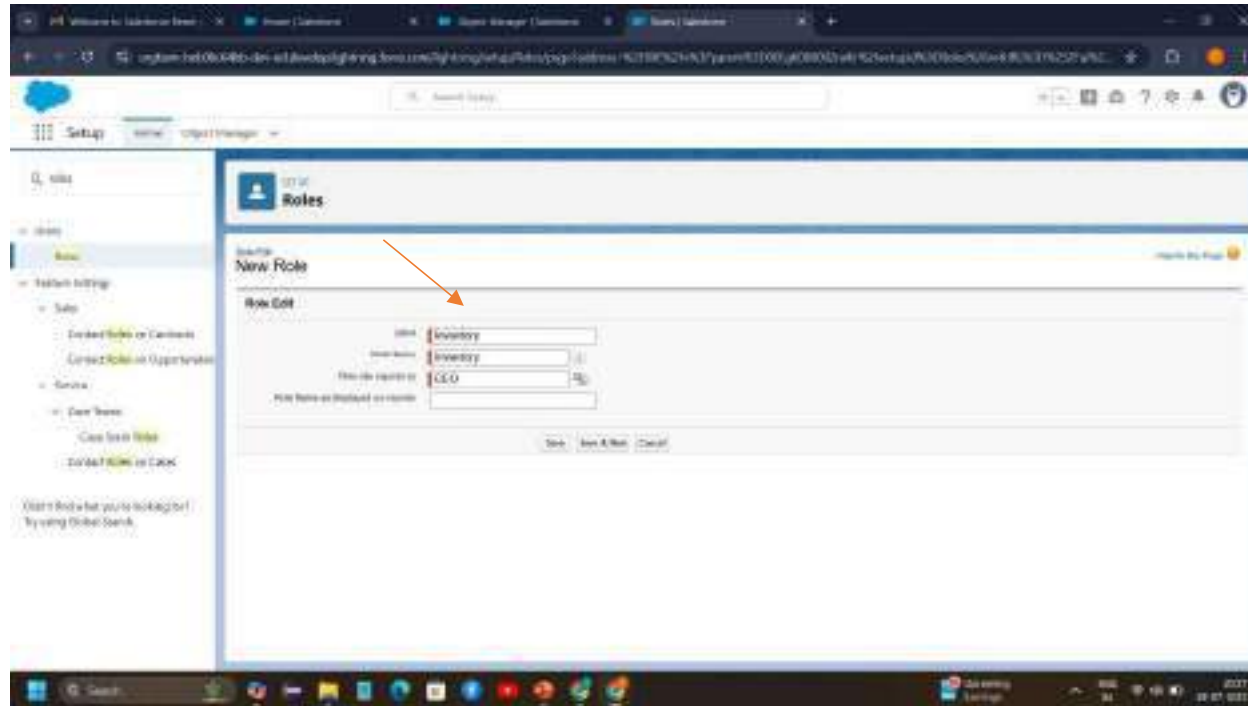
Set Up Roles

☐ Don't show this page again

Click on Expand All and click on add role under whom this role works(Here Click Add Role Under CEO role)
Give Label as “Sales” and Role name gets auto populated. Check to whom this role (Sales) reports. Then click on Save..



Create Roles



roles

Users
Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

SETUP Roles

Your Organization's Role Hierarchy

Collapse All Expand All Show in tree view

- Admin
- CEO
- COO
- Inventory
- Marketing
- Sales
- SVP Customer Service & Support
- Customer Support International
- Customer Support North America
- Installation & Repair Services
- SVP Human Resources
- SVP Sales & Marketing

Data Security - Users

User - Niklaus

Create User

Go to setup → type users in quick find box → select users → click New user.

Fill in the fields

First Name : Niklaus

Last Name : Mikaelson

Alias : Give an Alias Name

Email id : Give your Personal Email id

Username : Username should be in this form: text@text.text

Nick Name : Give a Nickname

Role : Sales

User license : Salesforce Platform

Profiles : Platform 1

User - Kol

Go to setup → type users in quick find box → select users → click New user.

Fill in the fields

First Name : Kol

Last Name : Mikaelson

Alias : Give a Alias Name

Email id : Give your Personal Email id

Username : Username should be in this form: text@text.text

Nick Name : Give a Nickname

Role : Inventory

User license : Salesforce Platform

Profiles : Platform 1

Save.

The screenshot shows the Salesforce 'New User' setup page. The 'User Edit' form is displayed with the following fields and values:

- First Name: Kol
- Last Name: Mikaelson
- Email: yannick.mikaelson@gmail.com
- Username: yannick.mikaelson@gmail.com
- Nickname: Kol
- Role: Inventory
- User License: Salesforce Platform
- Profile: Standard Platform User w/...
- Alias: ☒
- Marketing User: ☐
- Offline User: ☐
- Knowledge User: ☐
- Flow User: ☐
- Service Cloud User: ☐
- Sales Cloud User: ☐
- Salesforce Platform User: ☐
- MVC User: ☐
- Education User Type: None
- Data.com Weekly Refresh Limit: Default (1000000)
- Accessibility Mode (Default: On): ☐
- High Contrast Profile on Click: ☐

An orange arrow points to the 'Email' field.

Permission set - Permission_Platform_1

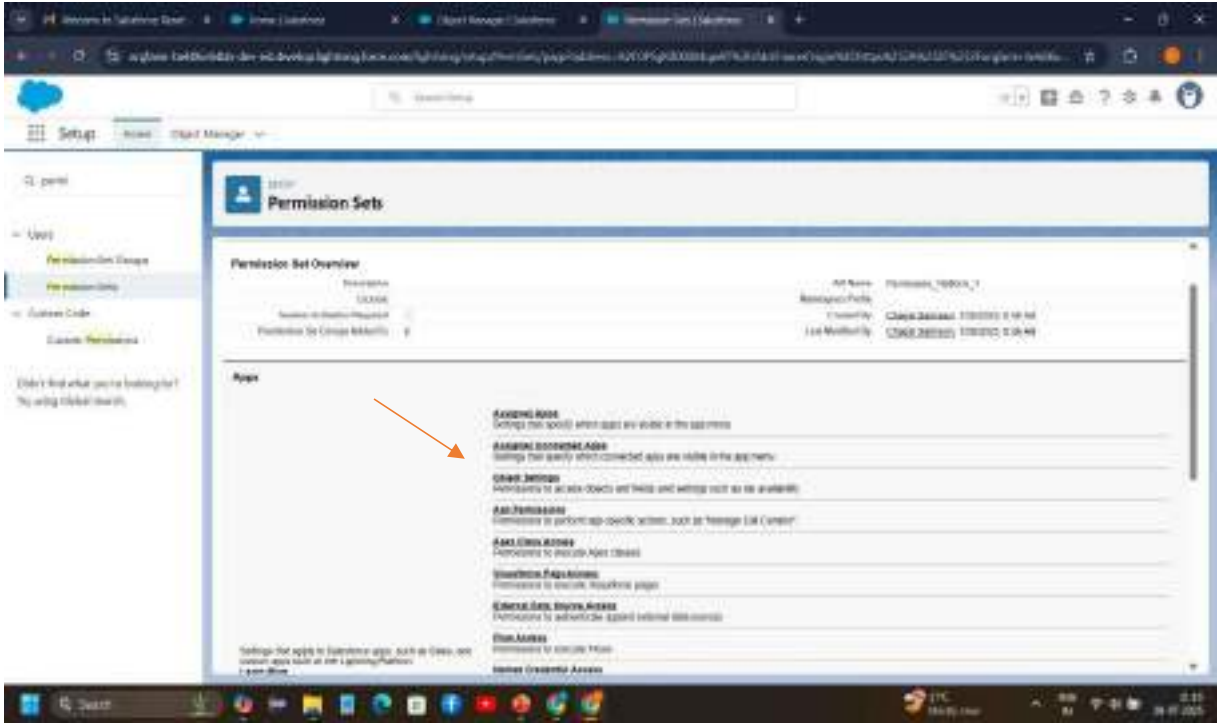
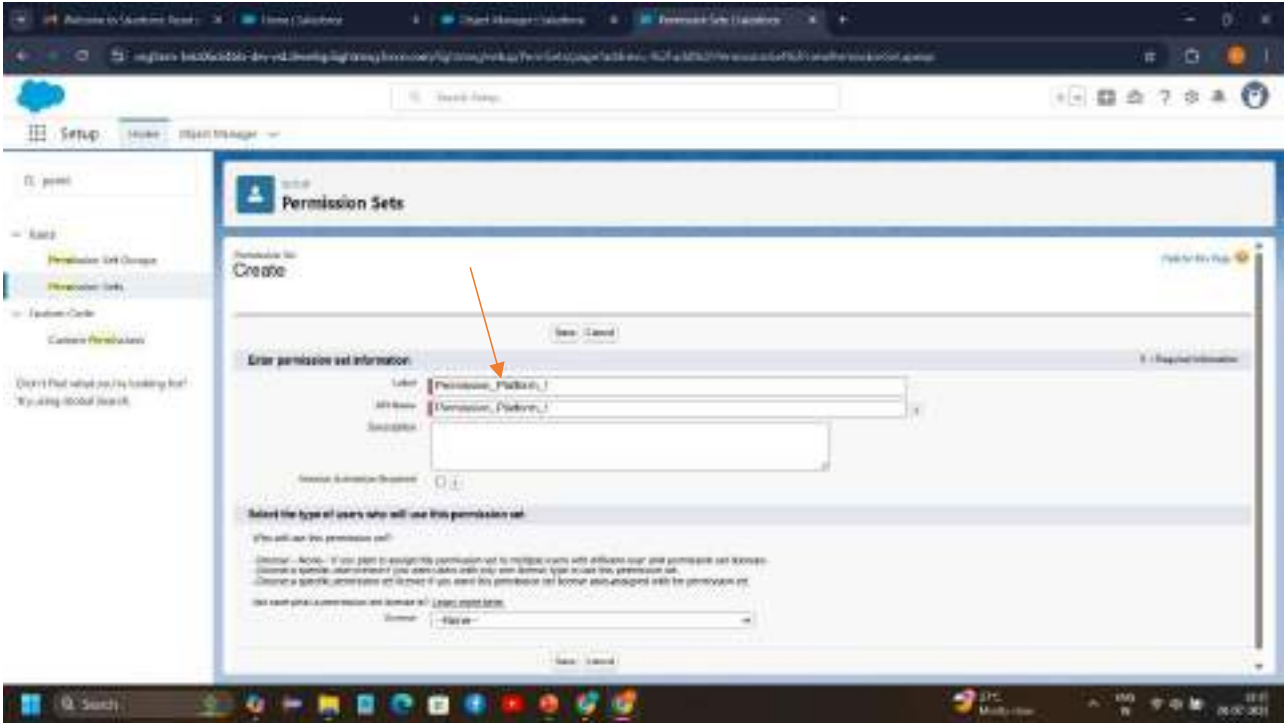
Go to setup → type “permission sets” in quick search → select permission sets → New

The screenshot shows the Salesforce Setup page for Permission Sets. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Permission Sets' and includes a sub-header 'On this page, you can create, view, and manage permission sets.' Below this is a dropdown menu for 'All Permission Sets' and a 'New' button. A table lists various permission sets, including 'Customer Data Platform', 'Data Cloud', and 'Agentforce'. The table has columns for Name, Description, and License. A red arrow points to the 'New' button.

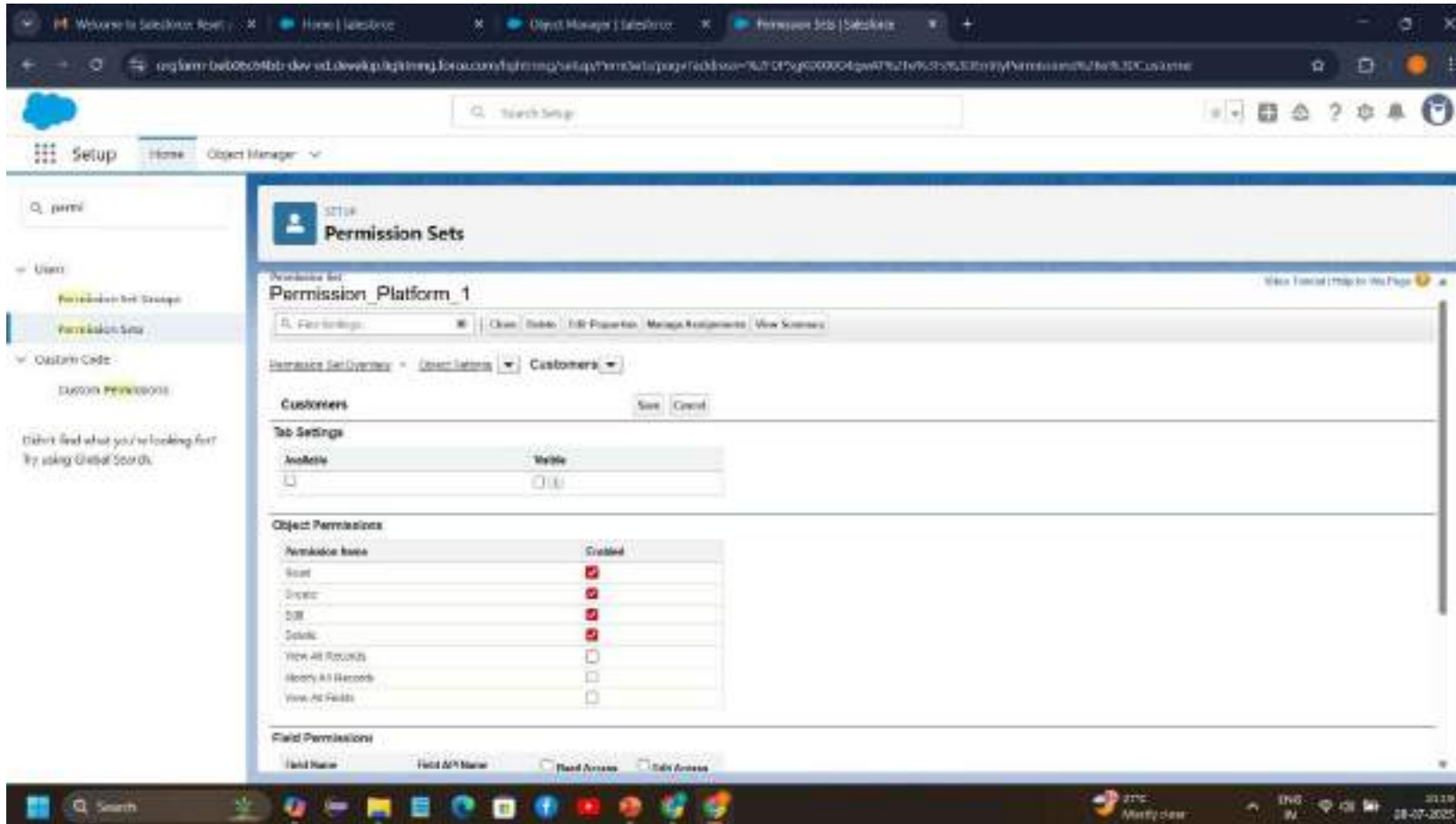
Name	Description	License
Customer Data Platform	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Customer Data Platform
Data Cloud	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Data Cloud
Agentforce	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Agentforce (Default)
Agentforce Service Agent	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Agentforce Service Agent
Agentforce Service Agent User	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Agentforce Service Agent User

Enter the label name as “Permission_Platform_1” → save.

Under Apps Select object settings.



Click on Customer object → click on Edit → under object permission check for read, create, edit, delete for HandsMen Customer object.



Repeat from step 3 and give permission for read, create, edit and delete on order object

The screenshot shows the Salesforce Setup interface for configuring a Permission Set. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and shows the configuration for 'Permission_Platform_1'. The 'Object Permissions' section is expanded, showing a table of permissions for the 'Orders' object. The permissions are: Read (checked), Create (checked), Edit (checked), Delete (checked), View All Records (unchecked), Modify All Records (unchecked), and View All Fields (unchecked). The 'Field Permissions' section is also visible but empty.

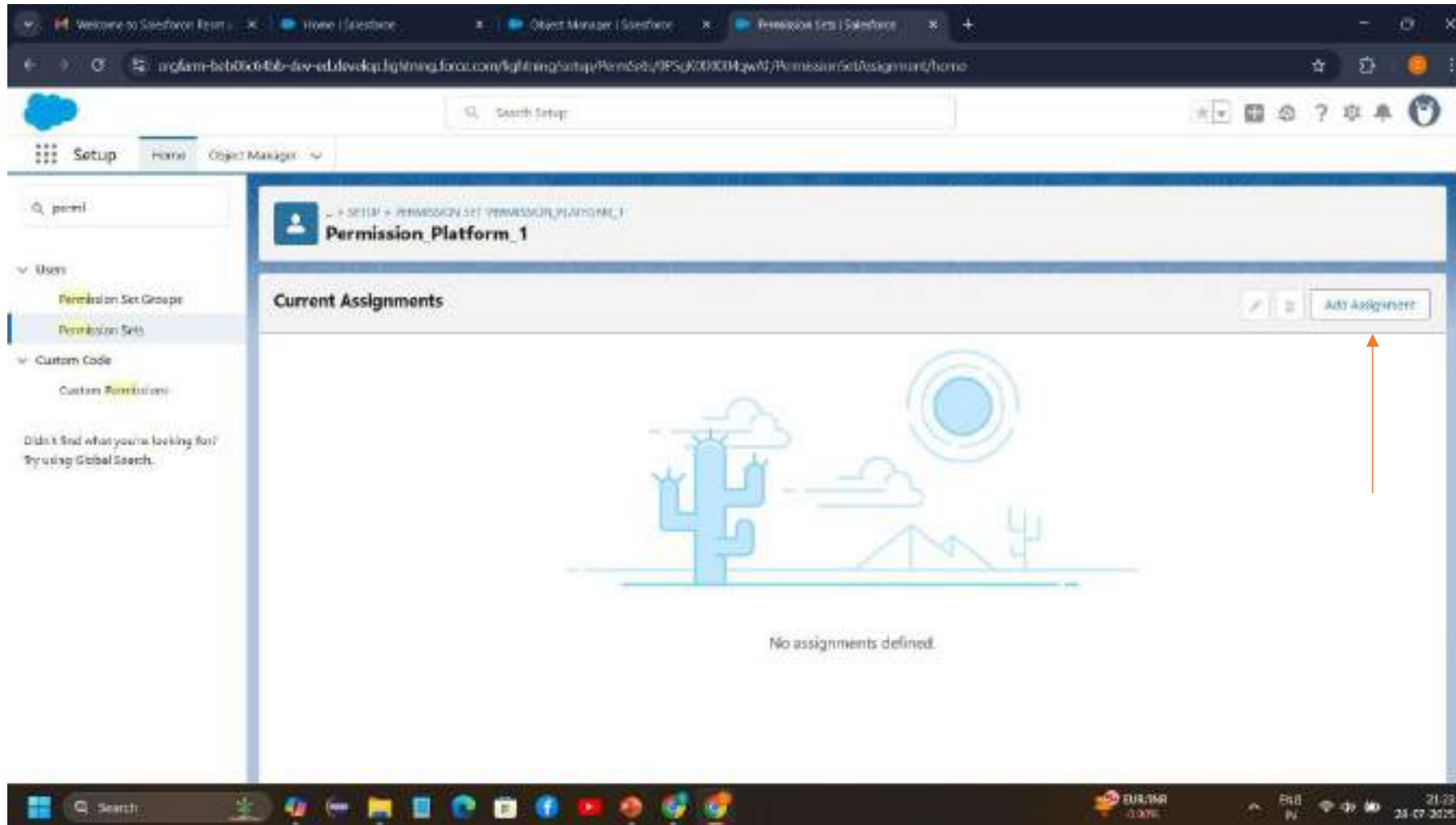
Permission Set: **Permission_Platform_1**

Object: **Orders**

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"/>

After saving the permission click on the Manage assignment
Now click on the Manage Assignment.



Now select the users(any one user with the profile “Platform 2”) and click on Next.
Click on Assign
Click on Done.

The screenshot shows the Salesforce 'Permission Set Assignment' page. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar. The main content area is titled 'All Users' and shows a list of users. The 'User Users' user is selected, and an arrow points to the 'Platform 2' profile.

	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chagal Samson	sam	samsonchagal000@orgentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatter.000000711@salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	Integ	integration@000000711@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Kal Mikaelson	kalika	samsonchagal@gmail.com	Inventory	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Niklaus Mikaelson	nmika	samsonchagal@gmail.com	Sales	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Digitalm EPIC	DERIC	epic49cc070d593@orgentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Security User	sec	insightsecurity@000000711@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input checked="" type="checkbox"/>	User Users	users	users0@gmail.com		<input checked="" type="checkbox"/>	Platform 2

Buttons: Cancel, Next

Email Template

Create an Order Confirmation Email Template

Steps to Create a Classic Email Template

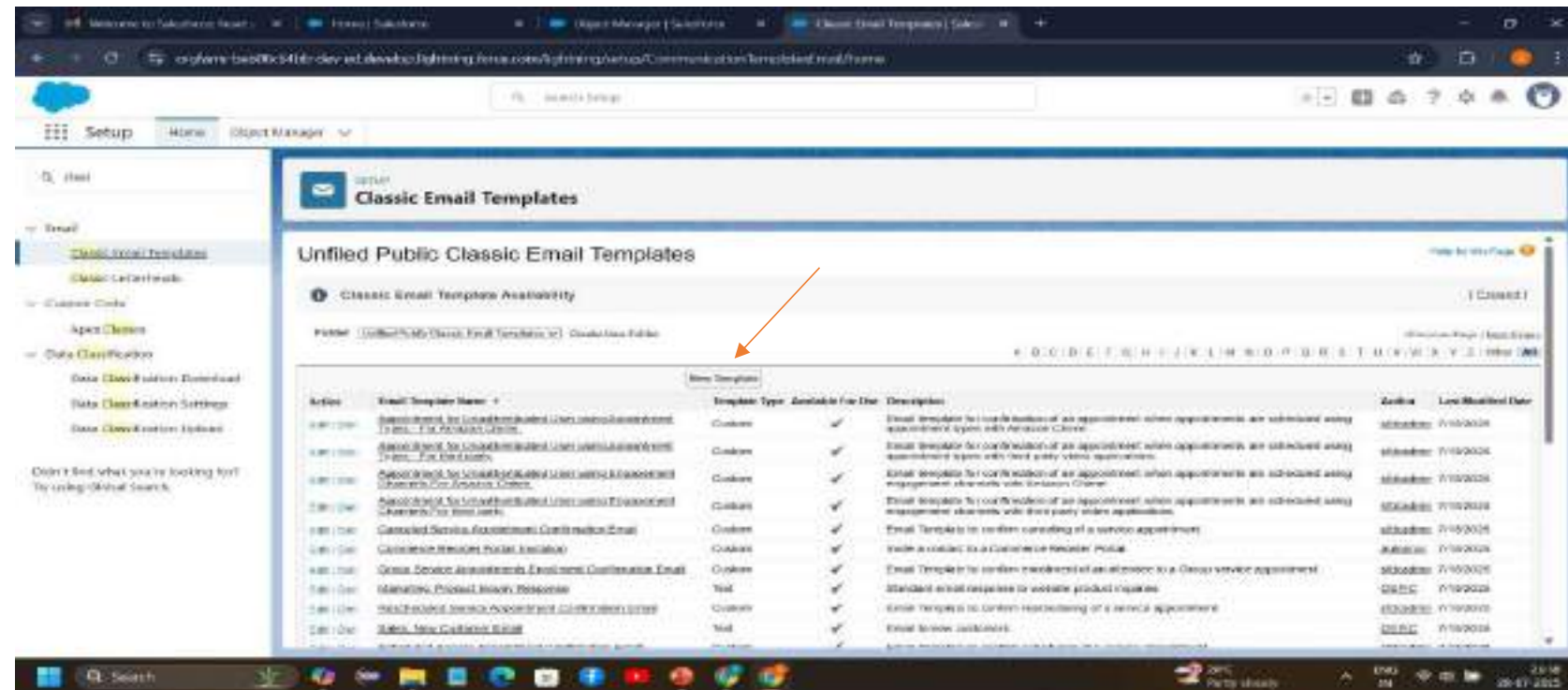
Go to Salesforce Setup

Click on the Gear Icon (⚙) in the top-right corner and select Setup.

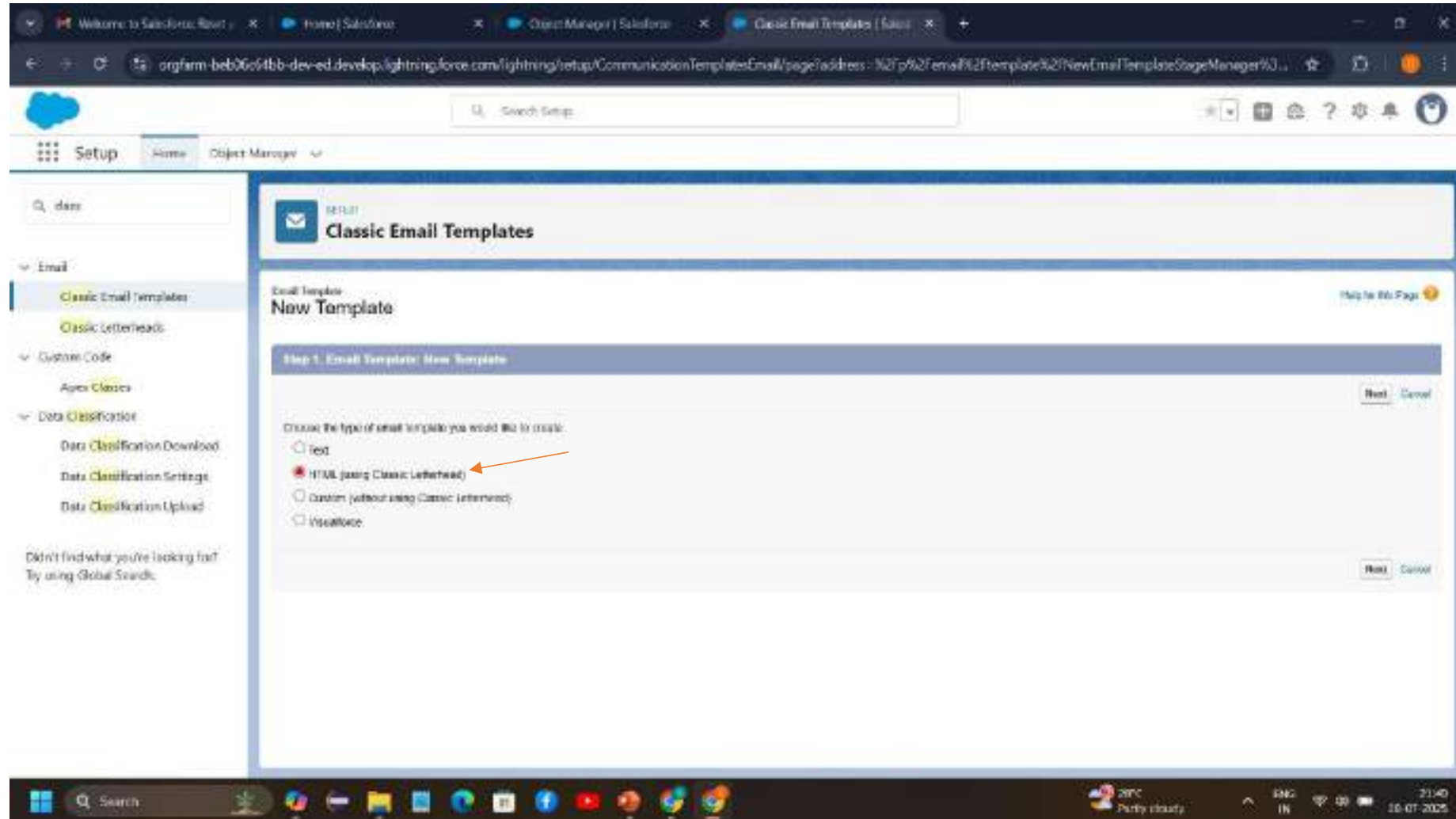
Navigate to Classic Email Templates

In Quick Find, search for Classic Email Templates and click on it.

Click "New Template"



Choose Text, HTML (with Classic Letterhead), Custom (without Classic Letterhead), or Visualforce. Select HTML (with Classic Letterhead) for a formatted email.



Fill in Template Details

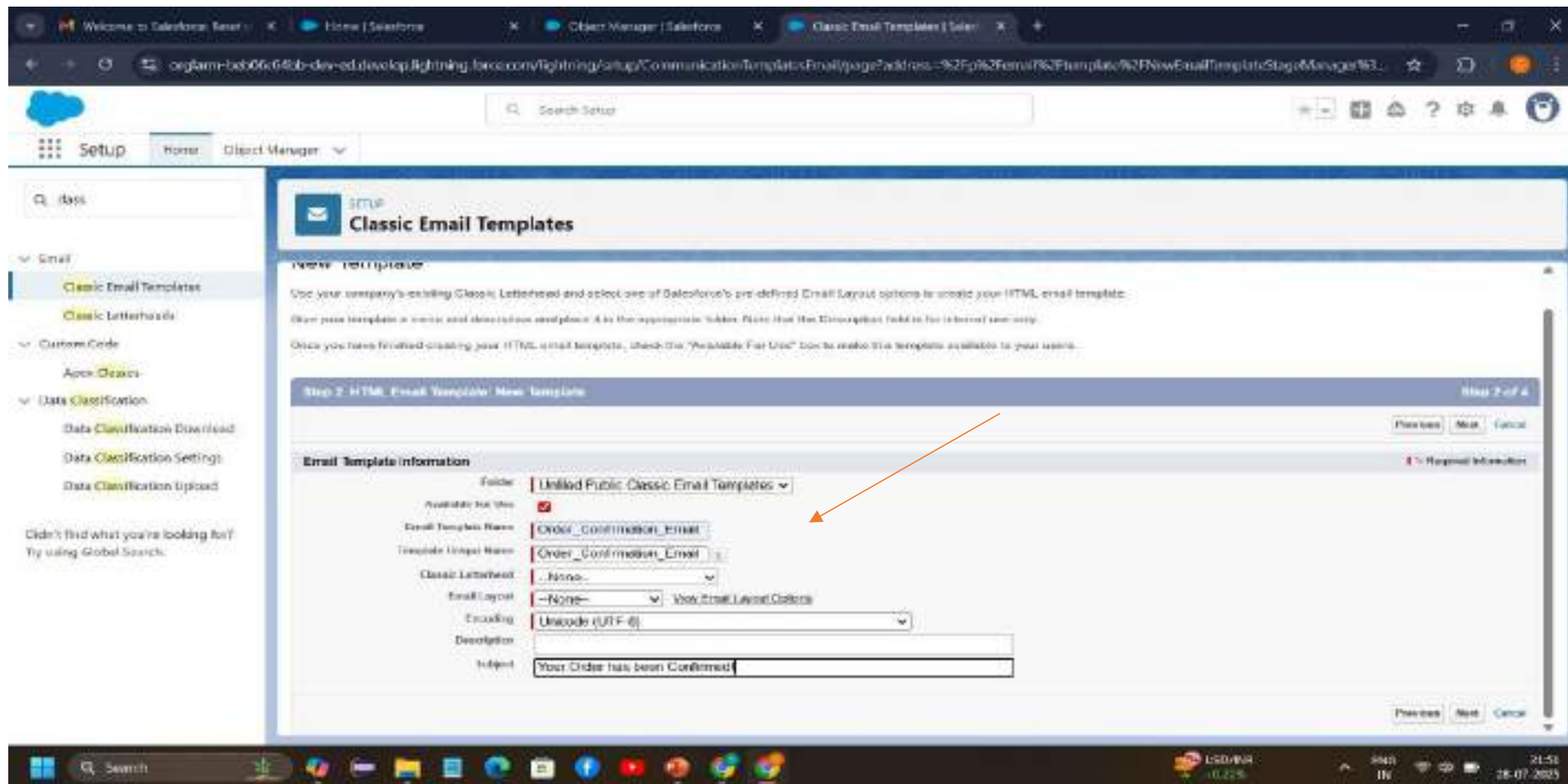
Folder: Select "Unfiled Public Email Templates" (or create a new folder).

Available for Use: ☒ (Check this box)

Email Template Name: Order_Confirmation_Email (or appropriate name).

Encoding: UTF-8 (default).

Subject: Your Order has been Confirmed!!



HTML Body:

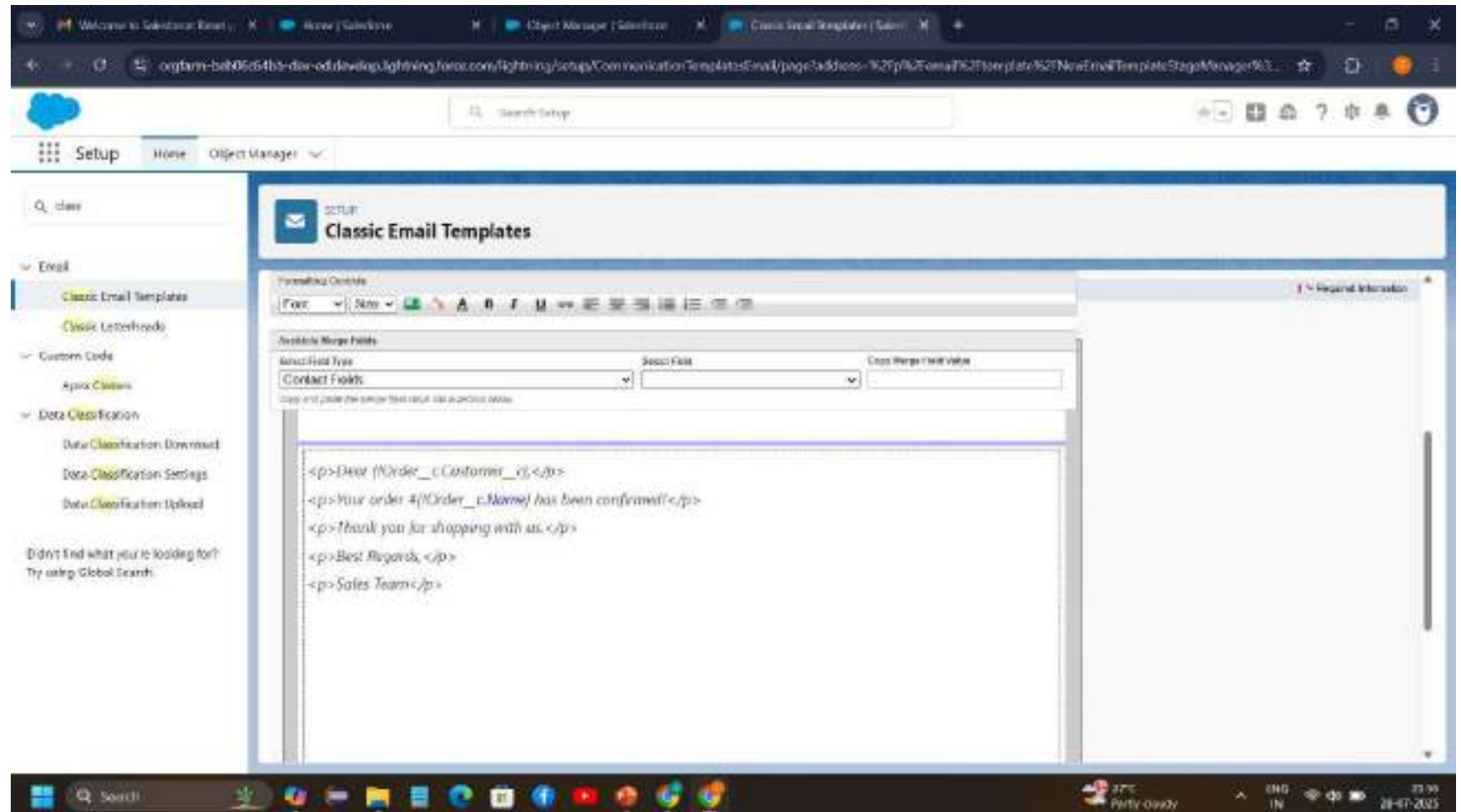
<p>Dear {!Order__c.Customer__c},</p>

<p>Your order #{!Order__c.Name} has been confirmed!</p>

<p>Thank you for shopping with us.</p>

<p>Best Regards,</p>

<p>Sales Team</p>



Save the Template.

The screenshot shows the Salesforce Classic Email Template editor. The browser address bar indicates the URL: `orgname-bob06c4bb-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address={%2Fplus2femail%2Ftemplate%2FNewEmailTemplateStageManager%2F...}`. The Salesforce Setup navigation bar is visible at the top, with tabs for Setup, Home, and Object Manager. The left sidebar shows the navigation menu with 'Email' expanded, highlighting 'Classic Email Templates'. The main content area is titled 'Classic Email Templates' and contains a 'Text-Only Email Content' editor. The editor has a 'Subject' field with the text 'Your Order has been Confirmed!' and a 'Text Body' field containing the following HTML content:

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

Buttons for 'Previous', 'Save', and 'Cancel' are located at the top right and bottom right of the editor. The Windows taskbar at the bottom shows the system clock as 21:57 on 28.07.2025.

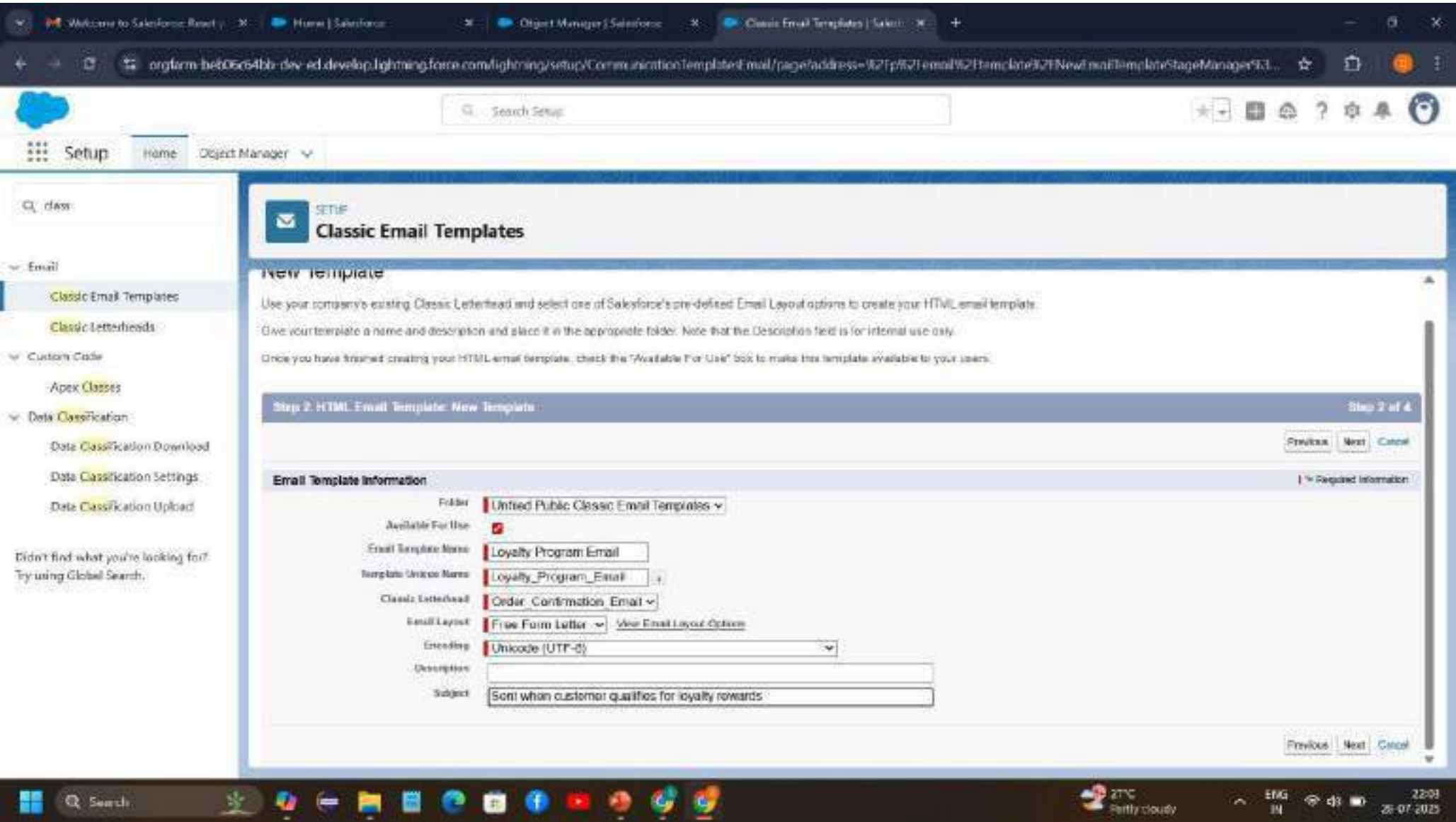
Create Remaining Email Template with the name "Low Stock Alert"

The screenshot shows the Salesforce Classic Email Templates setup page. The browser address bar indicates the URL: `orgname-bet0604bb-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2Fp%2Femail%2Ftemplate%2FNewEmailTemplateStageManager%2F...`. The page title is "Classic Email Templates". The left sidebar shows the navigation menu with "Email" expanded and "Classic Email Templates" selected. The main content area is titled "Classic Email Templates" and shows "Step 2 of 2: Test Email Template: New Template". The "Email Template Information" section contains the following fields:

- Folder: Untitled Public Classic Email Templates
- Available For Use: ☒
- Email Template Name: Low Stock Alert
- Template Unique Name: Low_Stock_Alert
- Encoding: Unicode (UTF-8)
- Description:
- Subject:
- Email Body: Sent when `(Inventory - Stock_Quantity) < 5`

Buttons for "Previous", "Save", and "Cancel" are visible at the bottom right of the form.

Create Remaining Email Template with the name **Loyalty Program Email"** as mentioned in the Email Template description.



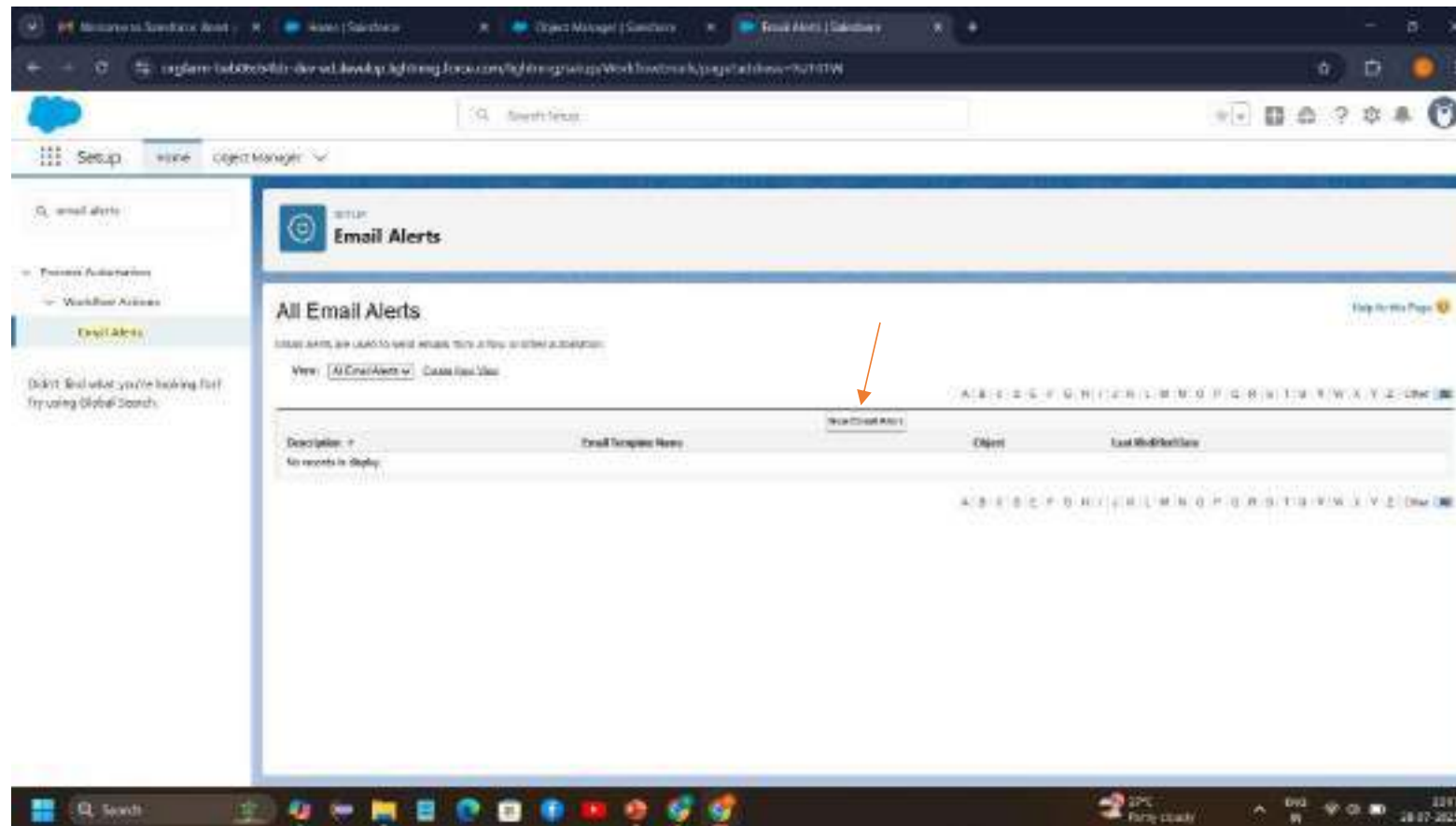
Create an Email Alert

Create an email alert to send an email when an order is confirmed.

Steps to Create an Email Alert

Go to Setup

In Quick Find, search for Email Alerts and click on it.



Description: Order Confirmation Email Alert

Object: Order__c

Email Template: Select the one created earlier.

Save the email alert.

The screenshot shows the Salesforce 'Email Alerts' configuration page. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Email Alerts' and includes a search bar. Below the search bar, there are tabs for 'Process Automation' and 'Workflow Actions'. The 'Email Alerts' tab is selected, showing the 'Email Alert Edit' form. The form includes fields for 'Description' (Order Confirmation Email Alert), 'Unique Name' (Order_Confirmation_Email), 'Object' (Handwritten Order), 'Email Template' (Order_Confirmation_Email), and 'Protected Component' (unchecked). There is also a 'Recipients' section with a search bar and a list of available recipients. The 'Available Recipients' list includes: User: Integration User, User: Kari Mikkelsen, User: Niklas Mikkelsen, User: OrgFam EPMC, User: Security User, and User: User User1. The 'Selected Recipients' list is empty. The bottom of the screen shows the Windows taskbar with various application icons and the system clock.

Setup
Email Alerts

Search Setup

Process Automation
Workflow Actions
Email Alerts

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

CREATE AN EMAIL ALERT TO ASSOCIATE WITH ONE OR MORE WORKFLOW RULES, APPROVAL PROCESSES, OR AUTOMATED PROCESSES. WHEN CHANGING AN EMAIL ALERT, THE MODIFICATIONS WILL APPLY TO ALL RULES, APPROVALS, OR AUTOMATED PROCESSES ASSOCIATED WITH IT.

Email Alert Edit
Back Save & New Cancel

Edit Email Alert

Description: Order Confirmation Email Alert

Unique Name: Order_Confirmation_Email

Object: Handwritten Order

Email Template: Order_Confirmation_Email

Protected Component: ☐

Recipients Type: Search: User to: Find

Recipients

Available Recipients

- User: Integration User
- User: Kari Mikkelsen
- User: Niklas Mikkelsen
- User: OrgFam EPMC
- User: Security User
- User: User User1

Add
Remove

Selected Recipients

- User: Chagel Samson

27°C
Partly cloudy

22:11
28.07.2025

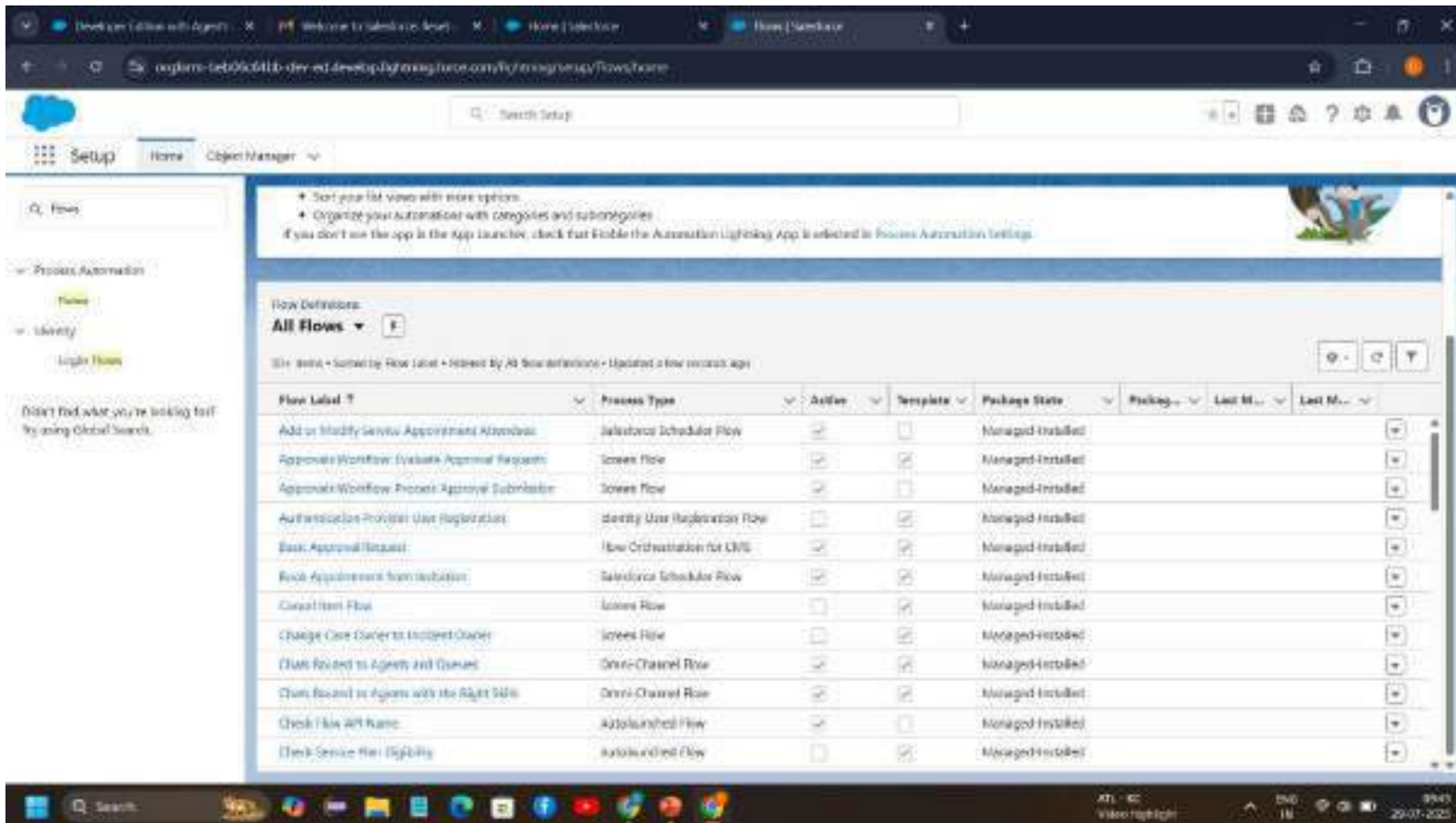
Flows

Create Order Confirmation Email

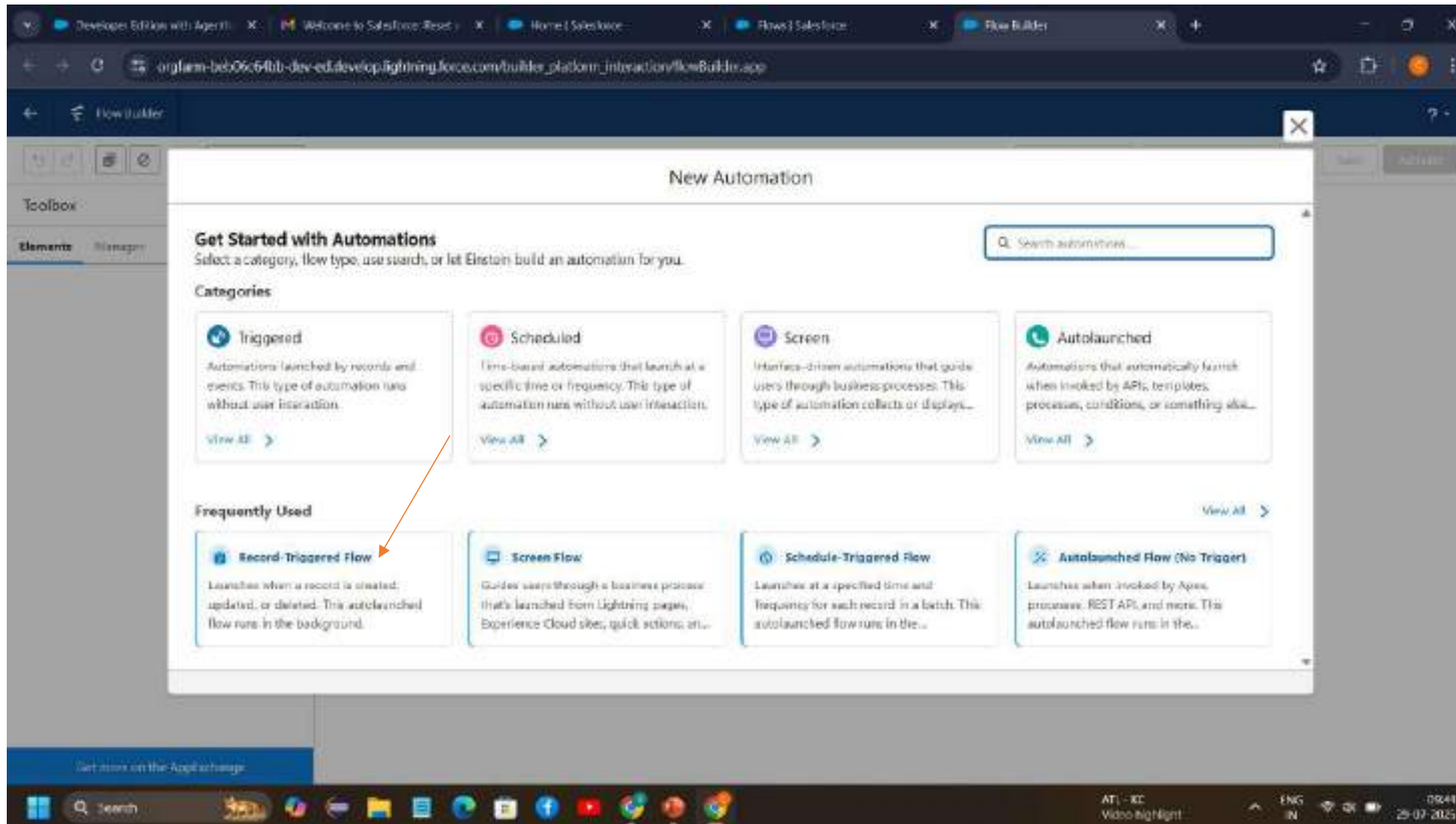
Order Confirmation Email (Record-Triggered)

Go to Setup → Flow

In Quick Find, search for Flows and click on it



Click New Flow → Select Record-Triggered Flow → Click Create.



Set Flow Trigger Details

Object: Order__c

Trigger: When a record is updated

Condition:

Field: Order__c.Status__c = "Confirmed"

Select Only when a record is updated to meet the condition

The screenshot displays the Salesforce Flow Builder interface. On the left, a canvas shows a 'Record-Triggered Flow' starting with 'Run Immediately' and ending with 'End'. On the right, the 'Configure Start' panel is open. The 'Object' is set to 'HandMtn Order'. Under 'Configure Trigger', 'A record is updated' is selected. In the 'Set Entry Conditions' section, the condition is configured as 'Status__c' equals 'Confirmed'. Two orange arrows point to the 'HandMtn Order' field and the 'Equals' operator.

Developer Edition with Agents | Welcome to Salesforce Flow | Home | Salesforce | Flow Builder

url: b05654b-dev-ed.develop.lightning.force.com/builder_platform/innovation/flowBuilder.app

Flow Builder

Run | Editing | Flow Tools | Save As New Version | Save | Cancel

Alert Settings | Auto Layout

Record-Triggered Flow
Start
Object: HandMtn Order
Trigger: A record is updated
Condition: +
Optimize for: Actions and Related Records
+ Add Scheduled Info (Optional)
Open Flow Trigger Assistant for HandMtn Order

Run Immediately

End

Configure Start

Object: HandMtn Order

Configure Trigger
Trigger the Flow When:
☐ A record is created
☒ A record is updated
☐ A record is created or updated
☐ A record is deleted

Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Missing unnecessary flow execution helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. They select the **Only when a record is updated to meet the condition requirements** option for **When to Run the Flow for Updated Records**.

Condition Requirements:
All Conditions Are Met (AND)

Field: Status__c Operator: Equals Value: Confirmed

+ Add Condition

Windows Taskbar: Search, 09:10, 29-07-2023

Add an "Action" Element

Click the "+" icon → Select Action.

Action Type: Send Email Alert

Email Alert: Select Order Confirmation Email Alert

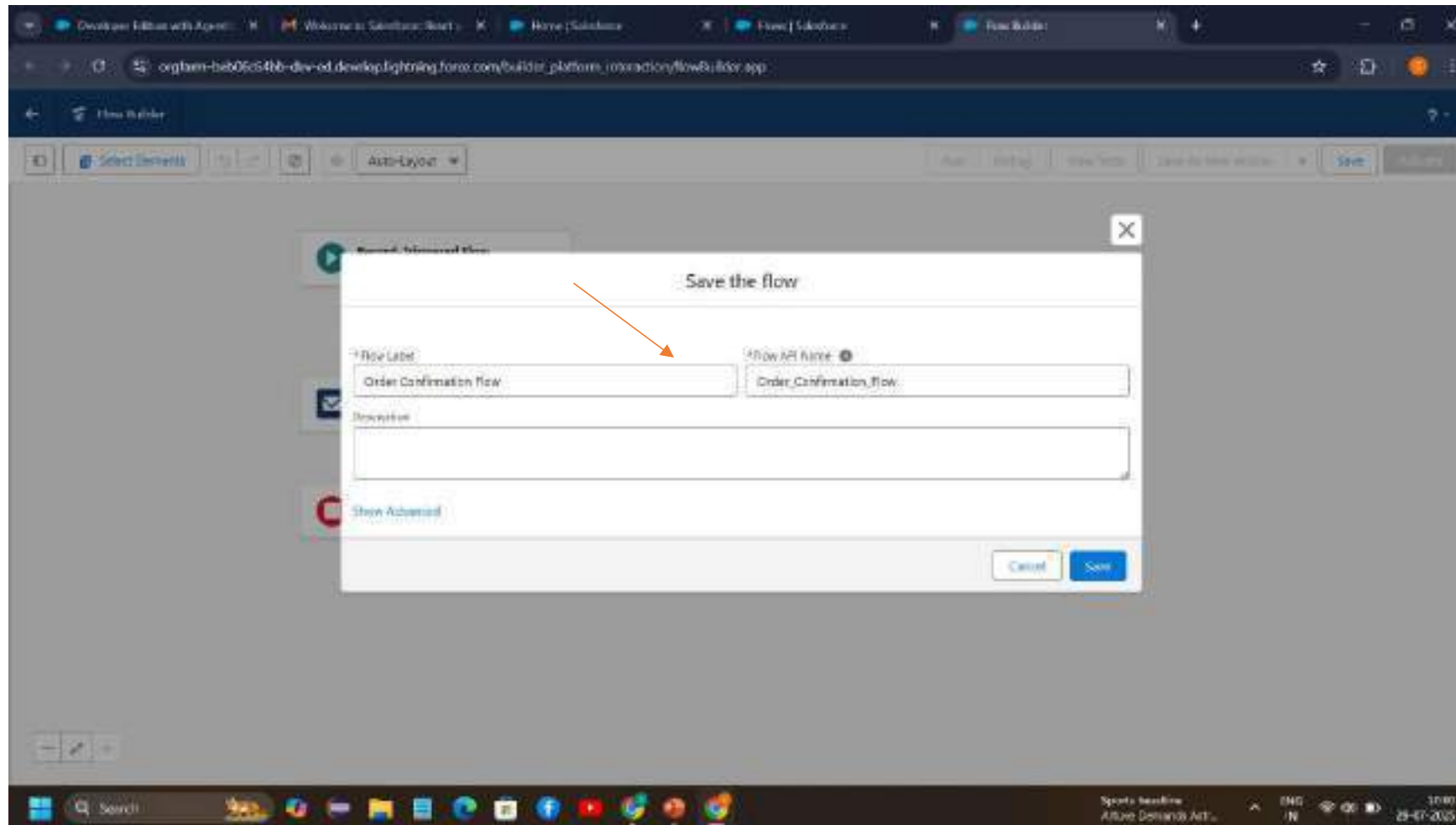
Label : Send Order Confirmation Email

Record ID : {!\$Record.Id}

Click Save.

The screenshot displays the Salesforce Flow Builder interface. The main canvas shows a flow diagram starting with a 'Record-Triggered Flow' event, followed by a 'Run Immediately' connector, then a 'Send Order Confirmation Email Alert' action, and finally an 'End' node. The 'Send Order Confirmation Email Alert' action is highlighted with a blue border. On the right side, the configuration panel for this action is visible. It includes a 'Label' field with the text 'Send Order Confirmation Email', a 'Path Name' field with the text 'Send Order Confirmation Email', and a 'Description' field. Below these fields, there is a section for 'Set Input Values' with a dropdown menu showing 'Record ID' and a text box containing the formula 'Triggering Record Id (Order__c) = Record Id'. An orange arrow points to the 'Label' field. The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 29-07-2025.

Save & Activate the Flow
Name: Order Confirmation Flow
Click Save → Activate.



Create Stock Alert Email (Record-Triggered)

Go to Setup → Flows → New Flow

Select Record-Triggered Flow → Click Create.

Set Flow Trigger Details

Object: Inventory__c

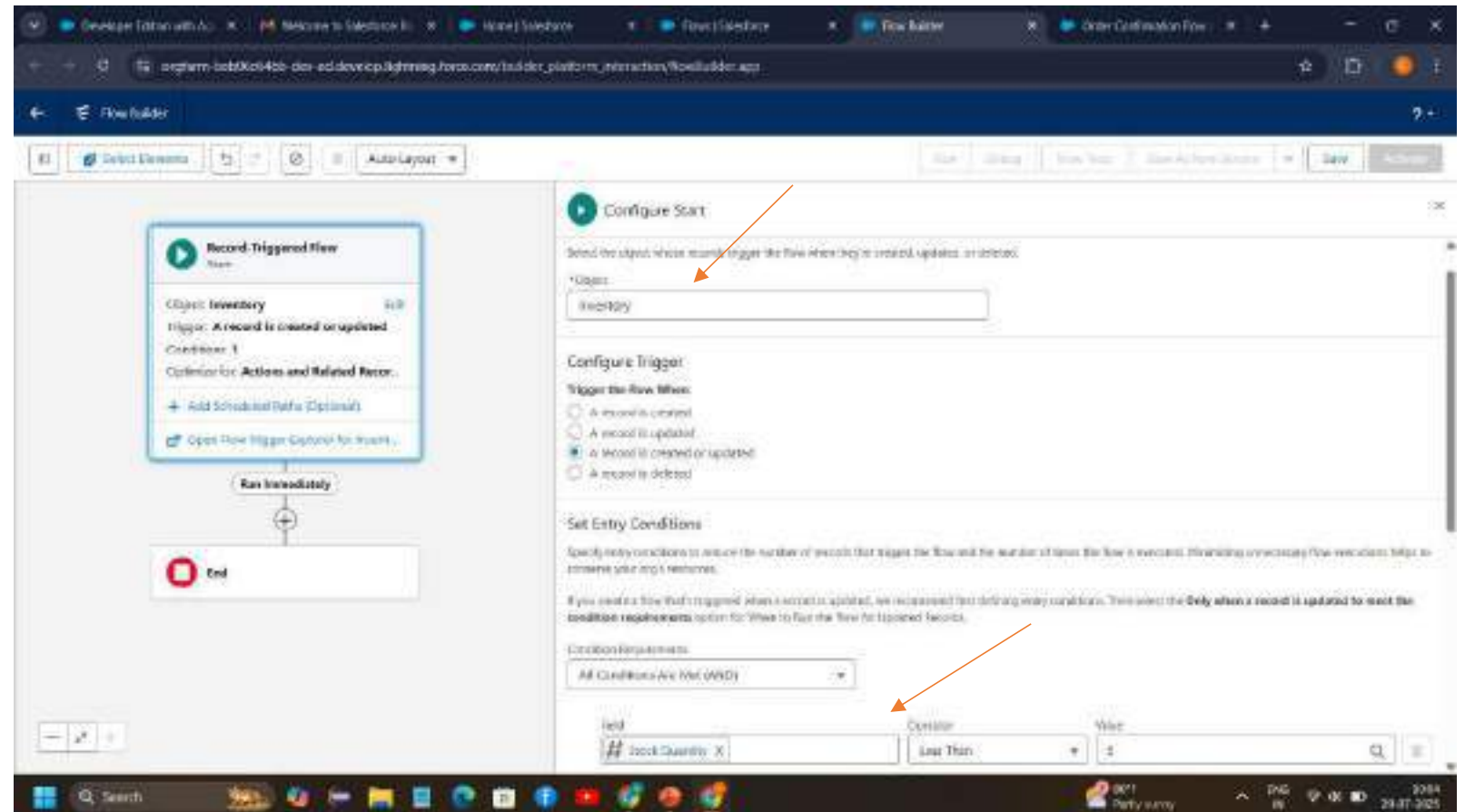
Trigger: When a record is created or updated

Condition:

Field: Stock_Quantity__c < 5

Select: Every time a record is updated
and meets the condition requirements

Click Done.



Add an "Action" Element

Click the "+" icon → Select Action.

Action Type: Send Email Alert

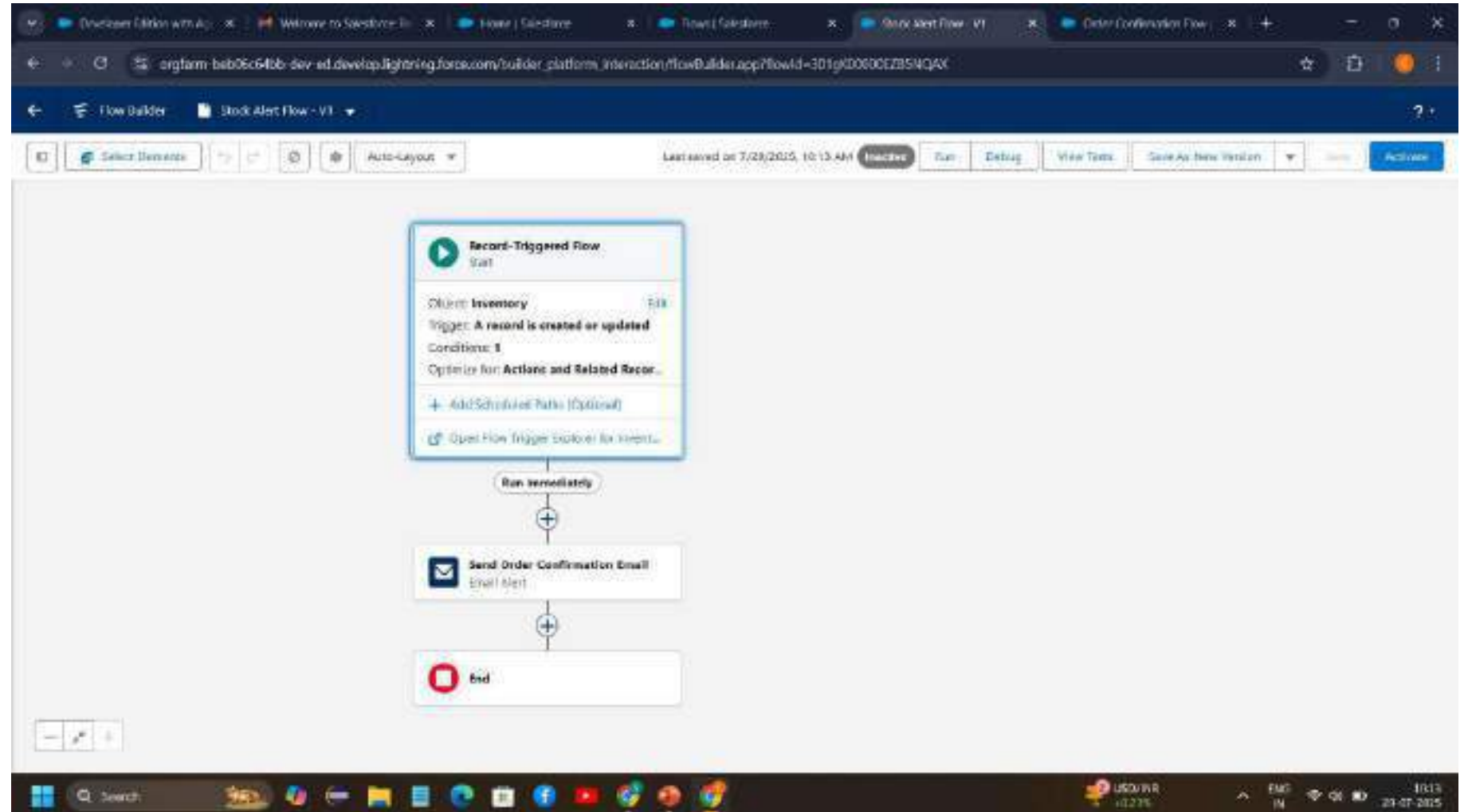
Create a new Email Alert (Similar to the Order Confirmation setup).

Recipient: Inventory Manager.

Save & Activate the Flow

Name: Stock Alert Flow

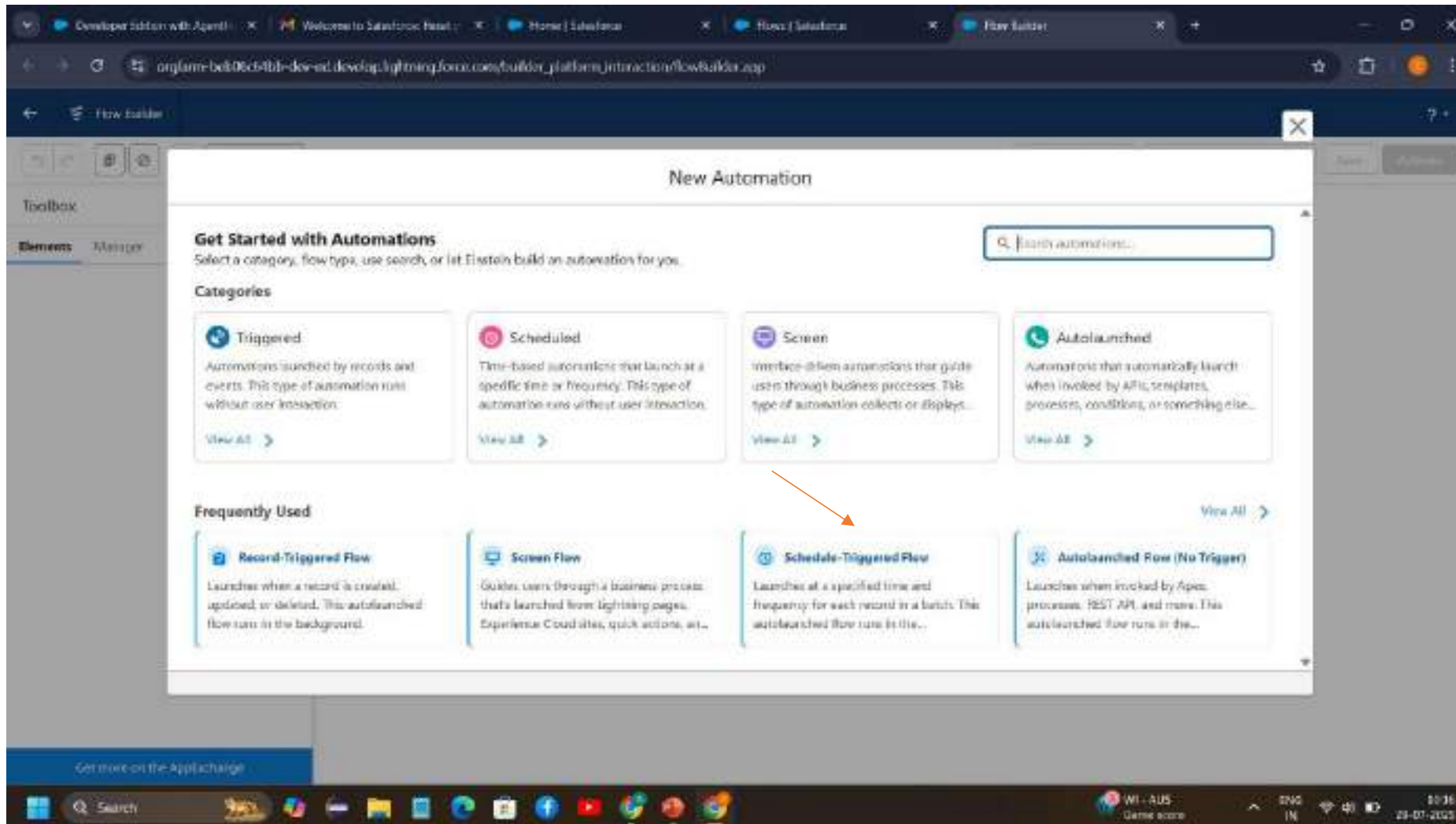
Click Save → Activate.



Create a Scheduled Flow

Go to Setup → Flows → New Flow

Select Schedule-Triggered Flow → Click Create.



Set Schedule Frequency

Set Start Date & Time: Choose Time to run daily.

Frequency: Select Daily.

Click Done.

The screenshot displays the Salesforce Flow Builder interface. The main workspace shows a flow diagram with a 'Start' node (a green play button) and an 'End' node (a red stop button). The 'Start' node is highlighted with a blue border. The 'Set a Schedule' configuration panel is open on the right side of the screen. It contains the following fields:

- Start Date:** A date picker showing 'Dec 31, 2024'.
- Start Time:** A time picker showing '5:50 AM'.
- Frequency:** A dropdown menu with 'Daily' selected.

An orange arrow points from the 'Frequency' dropdown to the 'Daily' option. The top of the browser window shows several tabs, including 'Developer Edition with Agentforce', 'Welcome to Salesforce Flow', 'Home | Salesforce', 'Flows | Salesforce', and 'Flow Builder'. The address bar shows the URL: 'orgname-b6b06c64bb-dev-ed.develop.lightning.force.com/builder_platform/interaction/flowBuilder.app'. The bottom of the screen shows the Windows taskbar with various application icons and the system clock displaying '10:58' on '21-07-2025'.

Add "Get Records" Element

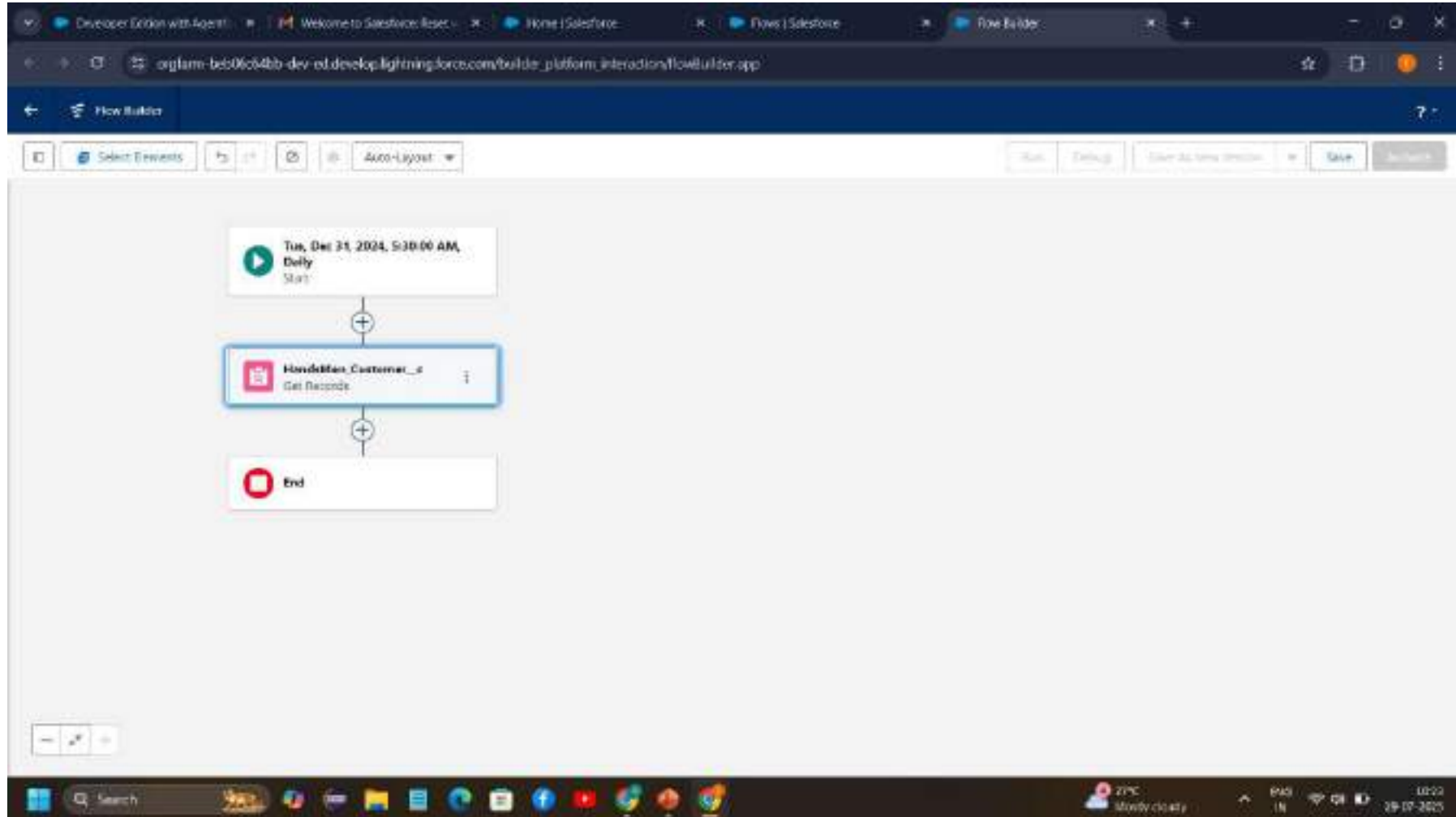
Click the "+" icon → Select Get Records.

Object: HandsMen_Customer__c

Filter: Retrieve all records.

Sort Order: None.

Click Done.



Add "Loop" Element

Click the "+" icon → Select Loop.

Collection: {!Get_Records}

Direction: First to Last.

Click Done.

Inside Loop -

Click the "+" inside the loop → Select Decision.

Set Conditions:

If Total_Purchases__c > 1000, Set Loyalty_Status__c = Gold.

Click the "+" Add Update Records

Records to Update: Select Specify Condition

Object: HandsMen Customer

Set Field Values: Loyalty_Status__c = Gold

Else if Total_Purchases__c < 500,

Set Loyalty_Status__c = Bronze.

Else, (Default Outcome) Set Loyalty_Status__c = Silver.

Click Done.

Save & Activate the Flow

Name: Loyalty Status Update Flow

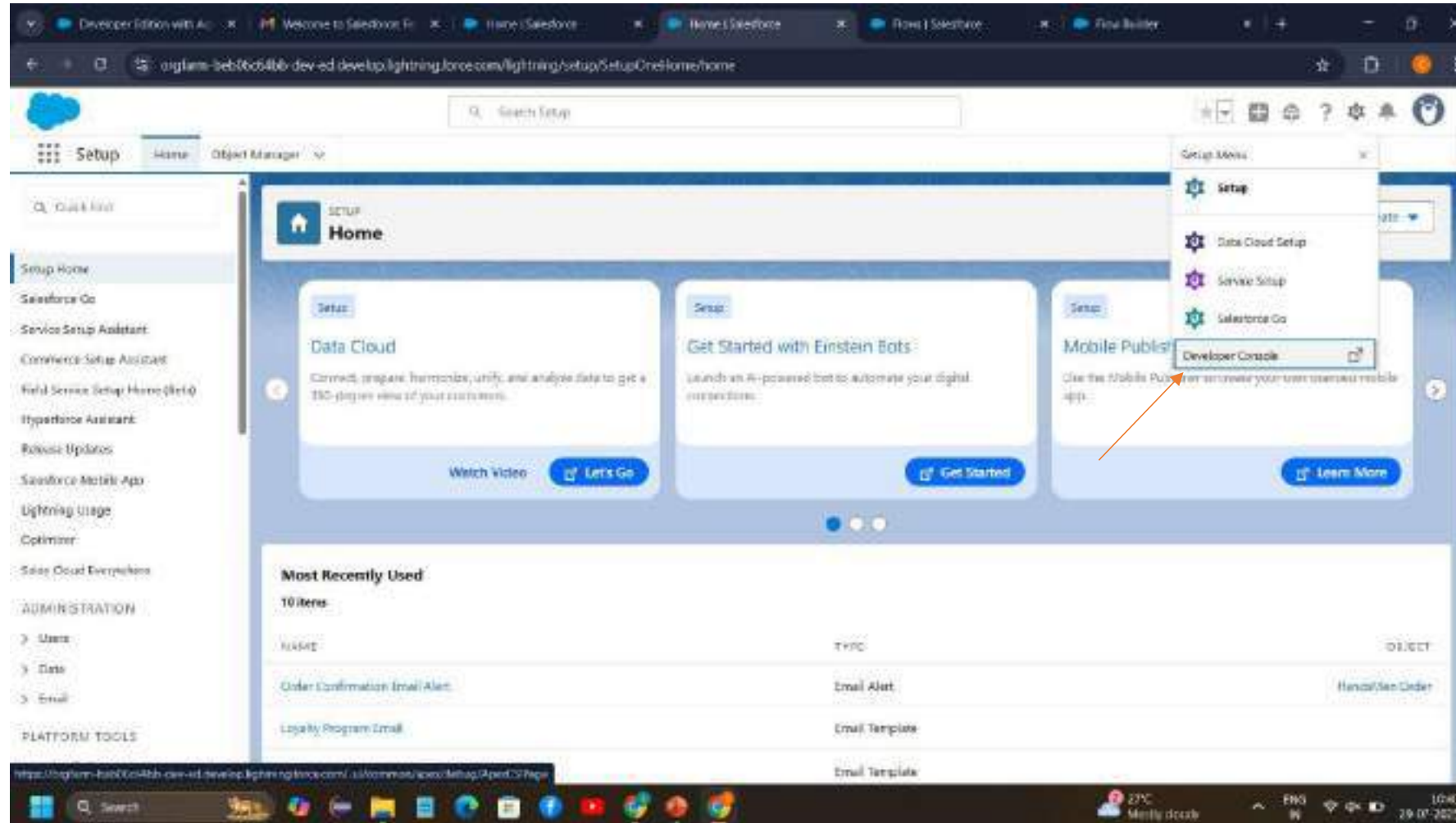
Click Save → Activate.



Automation using Apex

Create Apex Class

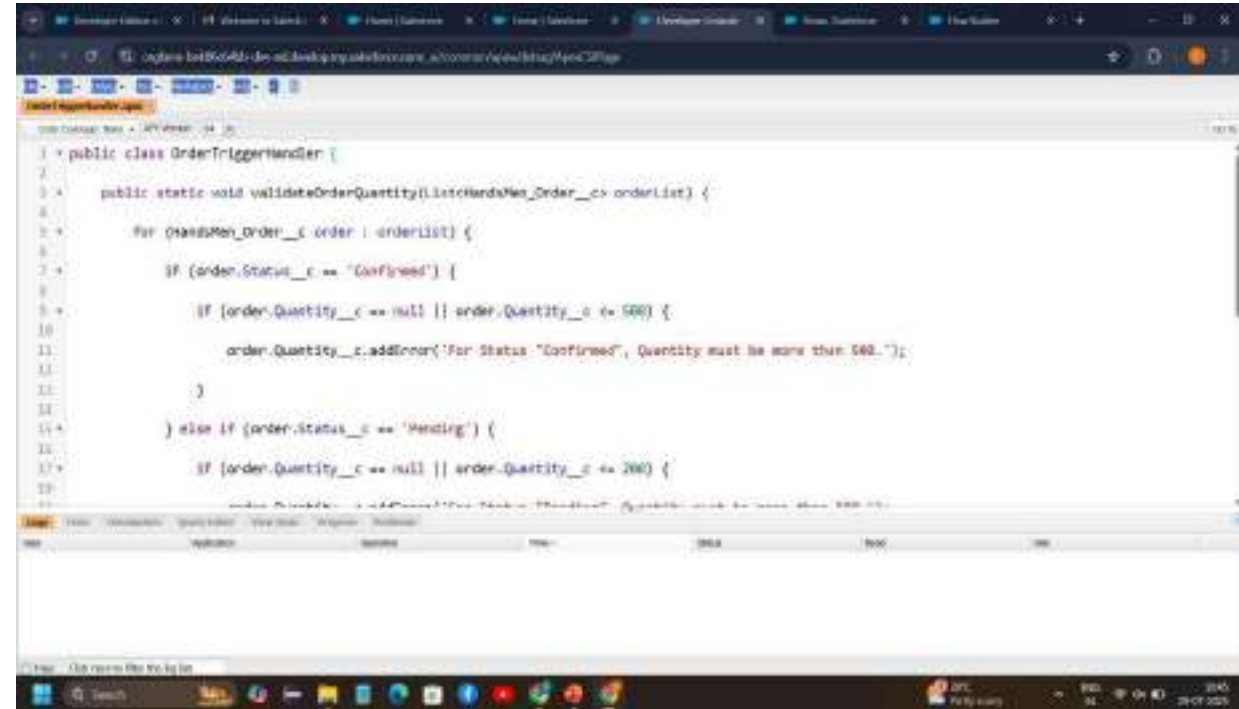
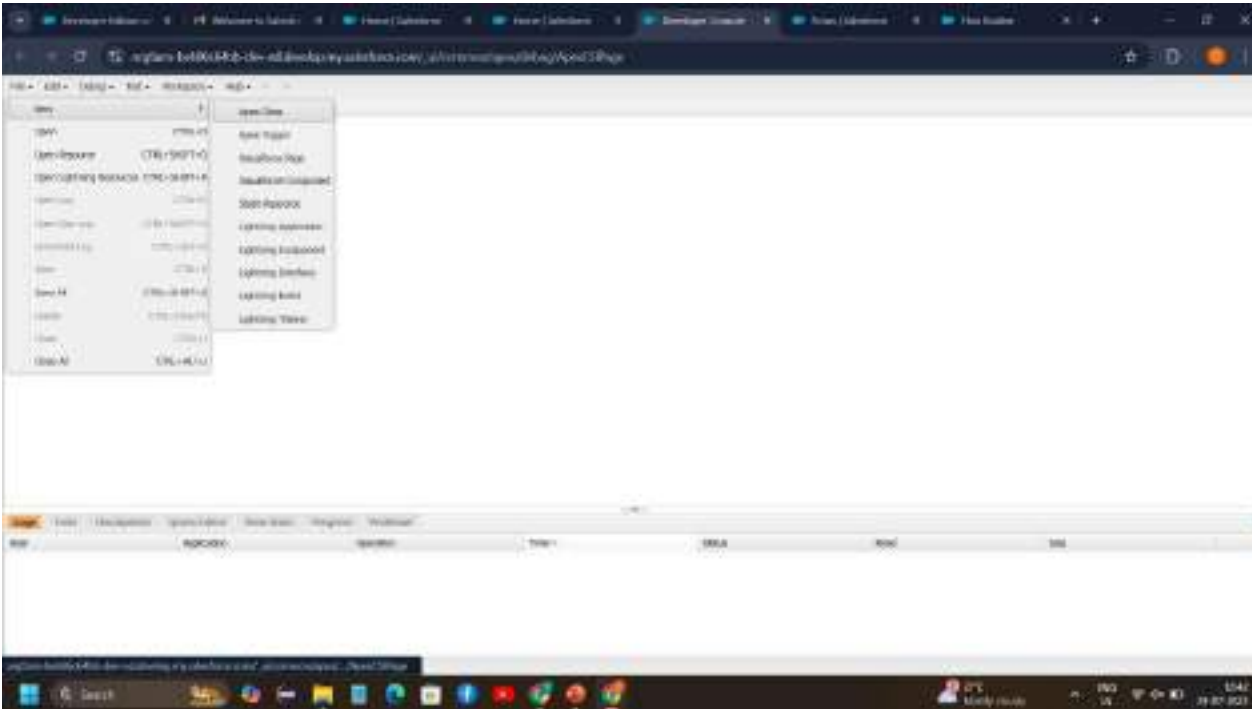
Go to Setup → Click on the gear icon → Select Developer Console.



Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.

To create a new Apex Class follow the below steps:

Click on the file → New → Apex Class.



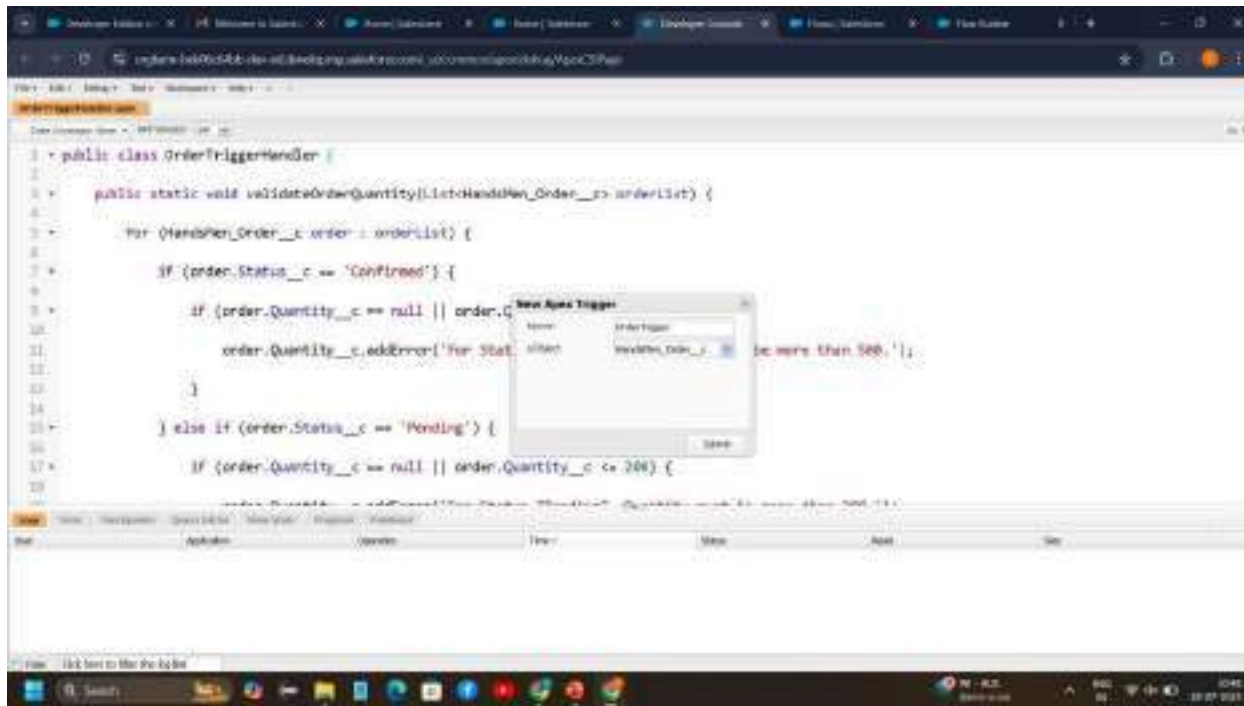
To create a new Apex Trigger follow the below steps:

Click on the file → New → Apex Class.

Give the Apex Trigger name as “OrderTrigger”, and select “HandsMen_Order__c” from the dropdown for sObject.

Click Submit.

Now write the code logic here



The screenshot shows the Salesforce IDE with the Apex TriggerHandler class code. A dialog box titled "New Apex Trigger" is open, showing the trigger name "OrderTrigger" and the sObject "HandsMen_Order__c". The code in the background is as follows:

```
1 public class OrderTriggerHandler {  
2  
3     public static void validateOrderQuantity(List<HandsMen_Order__c> orderList) {  
4  
5         for (HandsMen_Order__c order : orderList) {  
6  
7             if (order.Status__c == 'Confirmed') {  
8  
9                 if (order.Quantity__c == null || order.Quantity__c > 300) {  
10  
11                     order.Quantity__c.addError('For Stat. order be more than 300.');12  
13                 }  
14  
15             } else if (order.Status__c == 'Pending') {  
16  
17                 if (order.Quantity__c == null || order.Quantity__c <= 300) {  
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```

Batch Jobs

Create Batch Apex

Create an Apex Class

Go to Setup → Click on the gear icon → Select Developer Console.

Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.

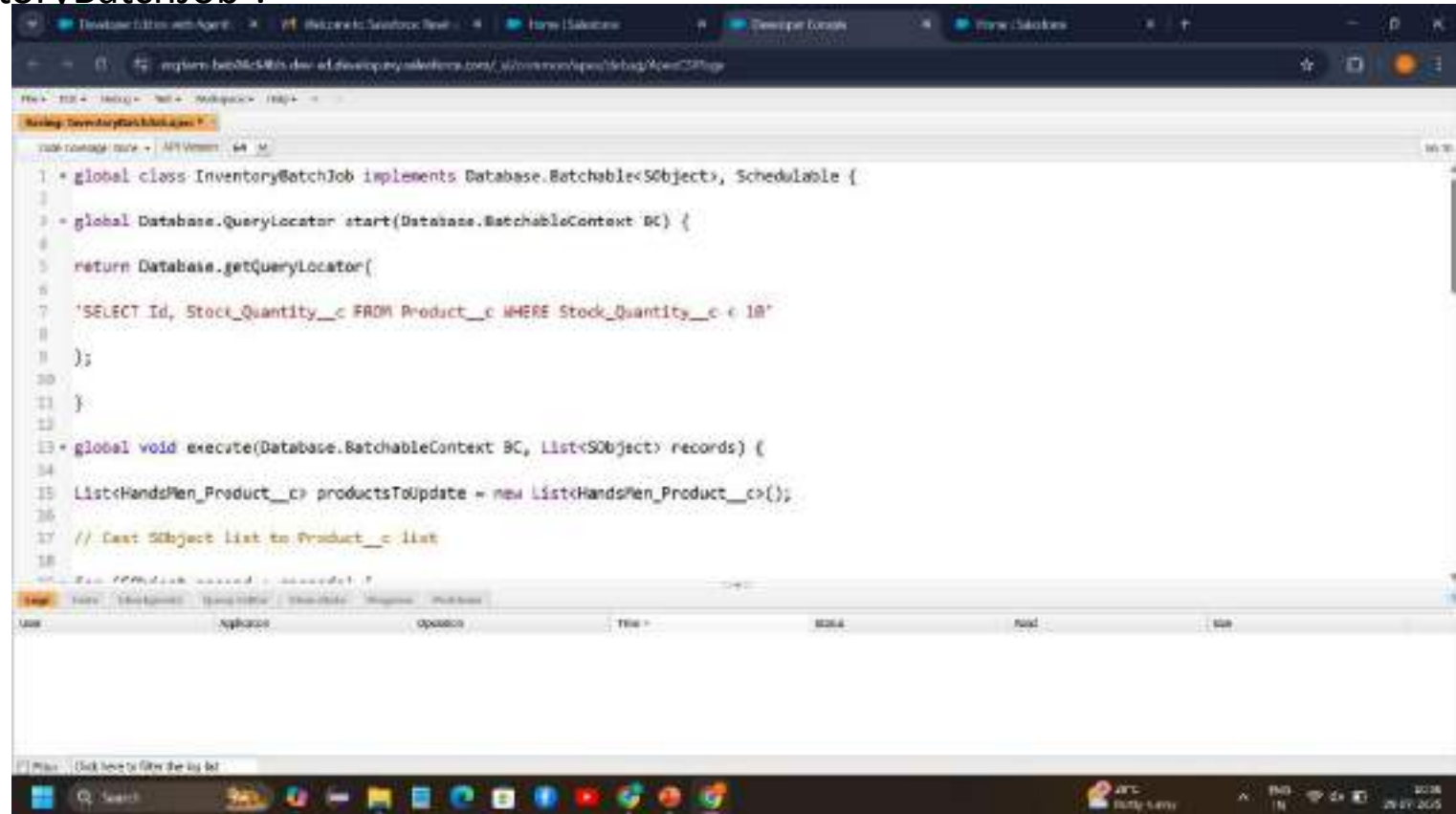
To create a new Apex Class follow the below steps:

Click on the file → New → Apex Class.

Give the Apex Class name as “InventoryBatchJob”.

Click ok.

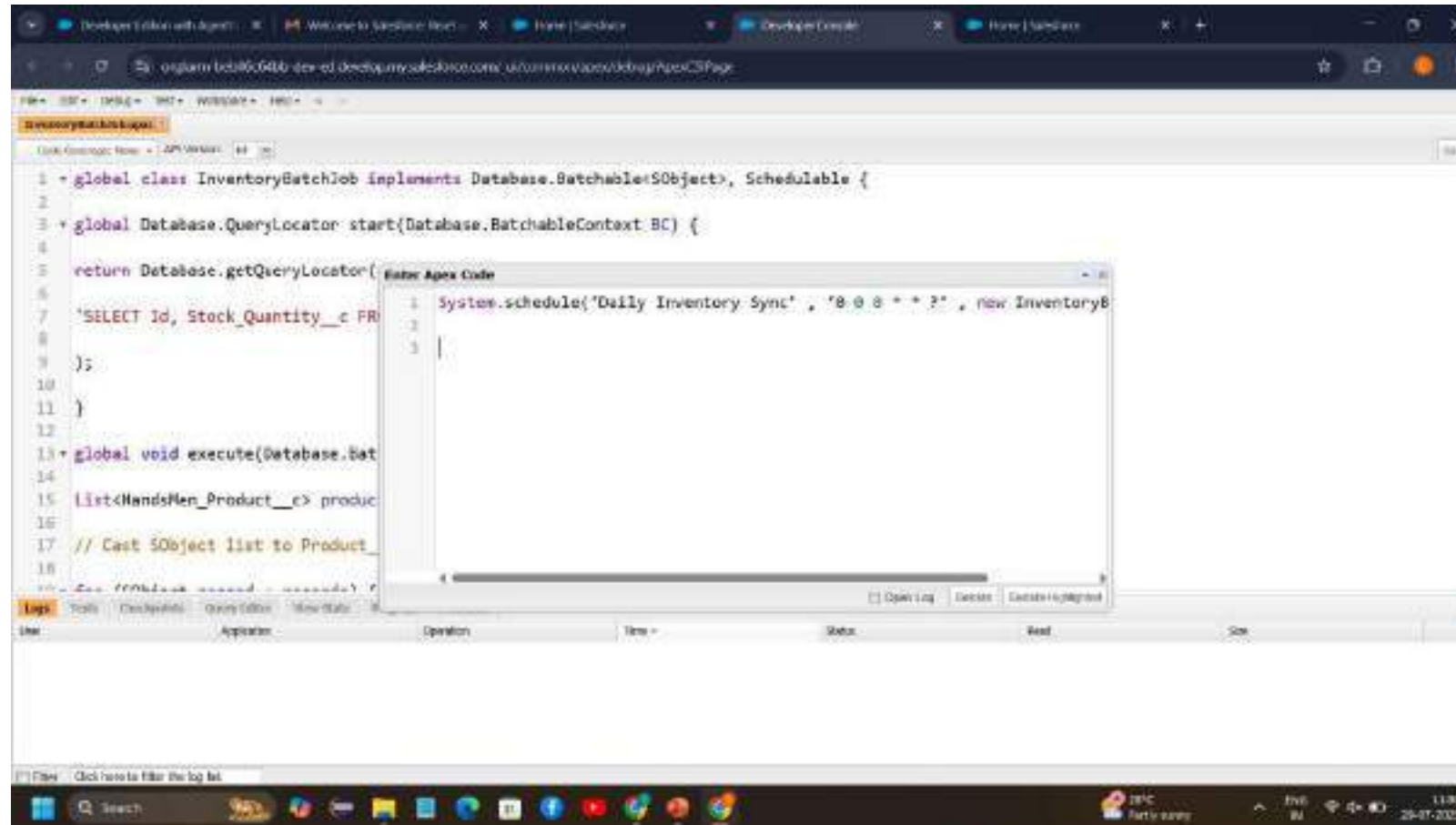
Now write the code logic here



```
1 * global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {  
2  
3     * global Database.QueryLocator start(Database.BatchableContext BC) {  
4  
5         return Database.getQueryLocator(  
6  
7             'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'  
8  
9         );  
10    }  
11 }  
12  
13 * global void execute(Database.BatchableContext BC, List<SObject> records) {  
14  
15     List<HandsPen_Product__c> productsToUpdate = new List<HandsPen_Product__c>({});  
16  
17     // Cast SObject list to Product__c list  
18  
19 }  
20 }  
21 }  
22 }  
23 }  
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99 }  
100 }
```


Activity 2

Go to Setup → Click on the gear icon → Select Developer Console.
To create a new Apex Class follow the below steps:
Click on the file → Debug → Open Execute Anonymous Window



Thank You