

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.

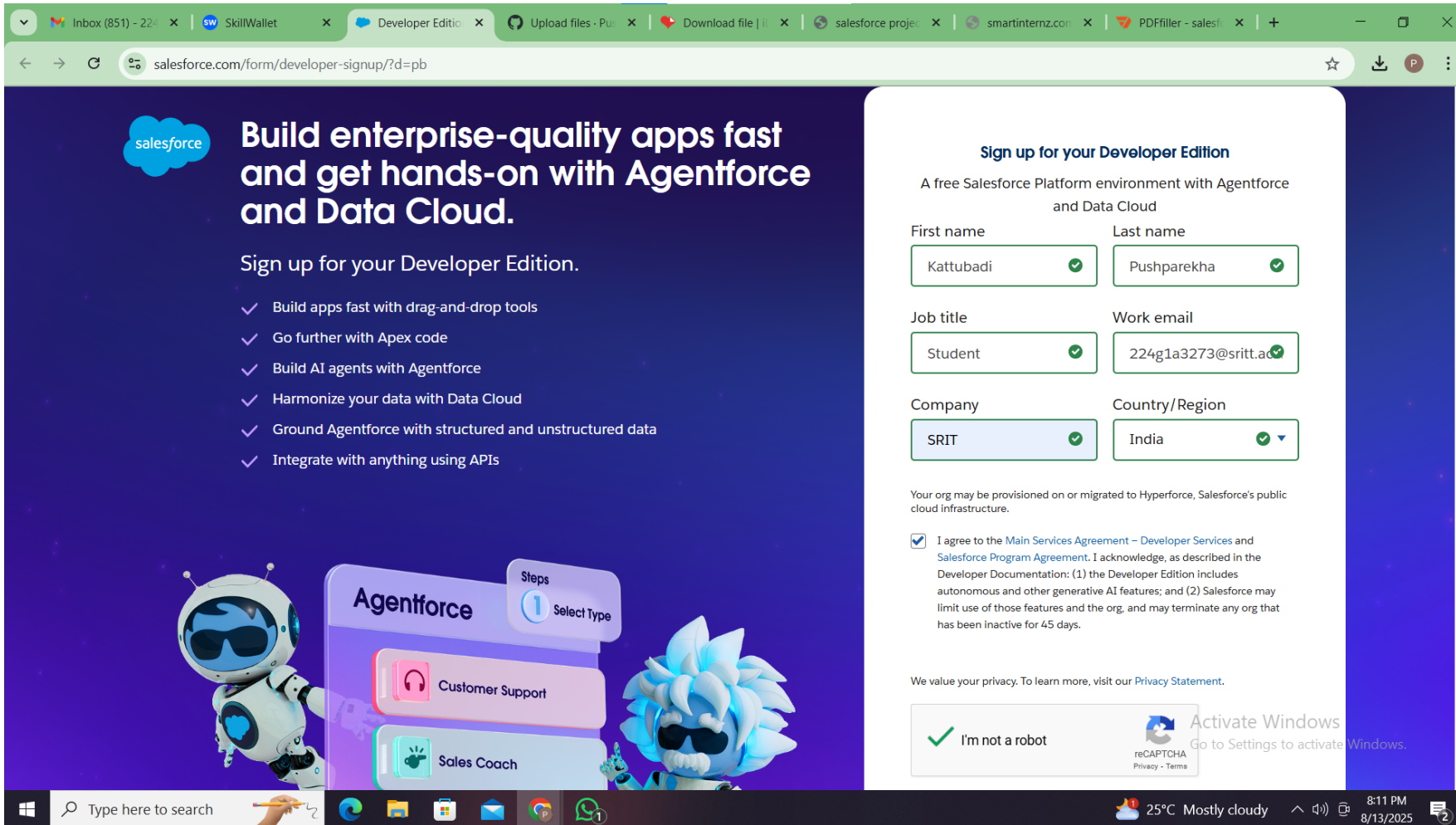
Post-go-live support and monitoring

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: Kattubadi ✓ Last name: Pushparekha ✓


Job title: Student ✓ Work email: 224g1a3273@sritt.ac ✓

Company: SRIT ✓ Country/Region: India ✓

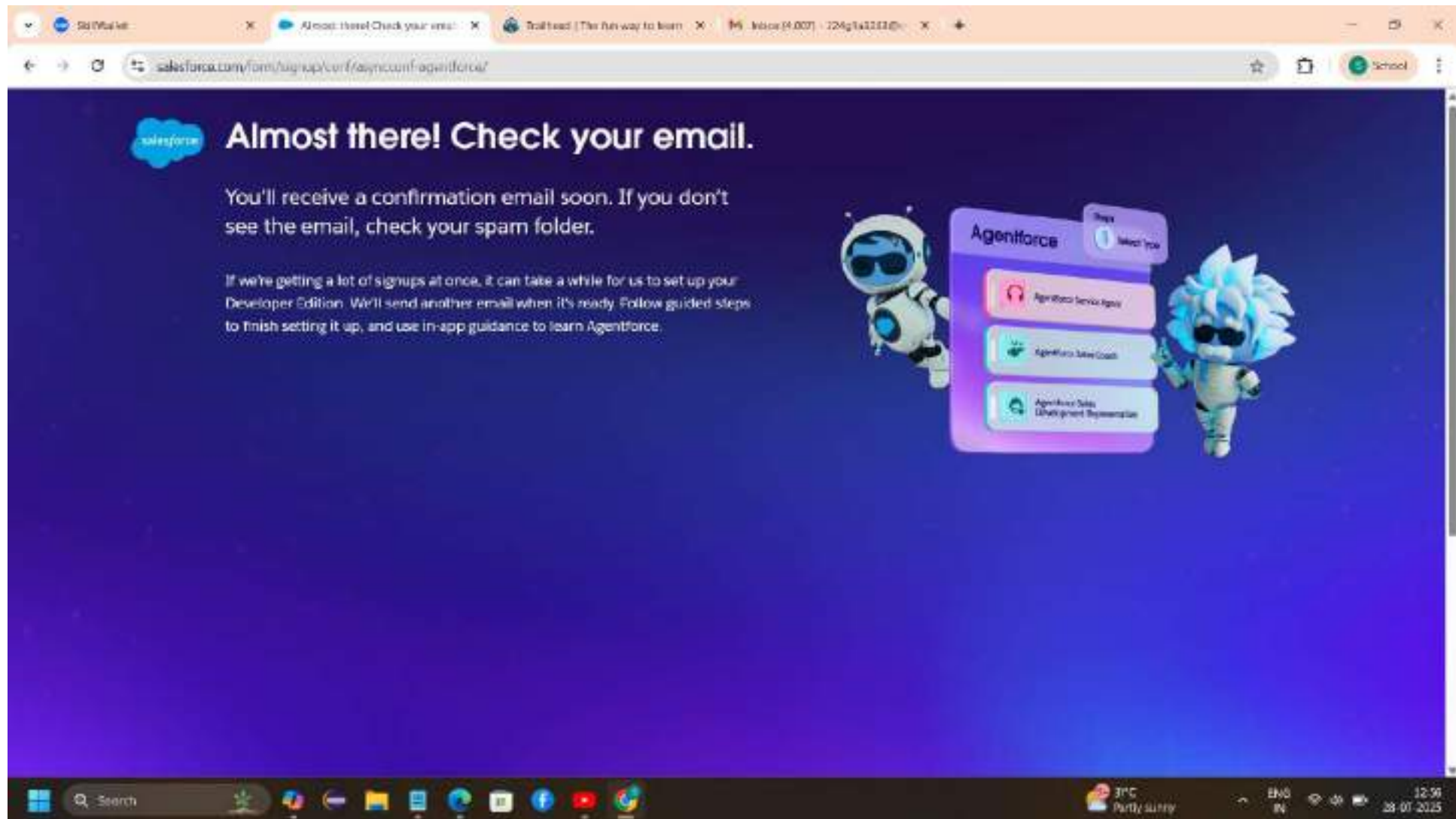
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#). I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our [Privacy Statement](#).

☒ I'm not a robot 

Activate Windows
Go to Settings to activate Windows.



Account Activation

The screenshot shows a Gmail interface with a search bar containing "salesforce". The email list on the left shows an email from Salesforce with the subject "Thanks for signing up with Salesforce!". The email content is displayed in the main pane, featuring a blue header with the text "Thanks for signing up with Salesforce!". Below this, there is a section titled "Click below to verify your account." with a blue button labeled "Verify Account". Underneath the button, it says "To easily log in later, save this URL:" followed by the URL <https://srit-6d-dev-ed.develop.my.salesforce.com>. It also provides the "Username: pushpa234@srit.in". The email concludes with "Again, welcome to Salesforce!". The footer of the email states "© Copyright 2025 Salesforce, Inc. All rights reserved. Various trademarks held by their respective owners.".

Thanks for signing up with Salesforce!

Click below to verify your account.

[Verify Account](#)

To easily log in later, save this URL:
<https://srit-6d-dev-ed.develop.my.salesforce.com>

Username:
pushpa234@srit.in

Again, welcome to Salesforce!

© Copyright 2025 Salesforce, Inc. All rights reserved. Various trademarks held by their respective owners.

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, Task View, File Explorer, Edge, Mail, Teams, Chrome, Outlook, OneDrive, Settings, Task Manager, System Tray (SNC, 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

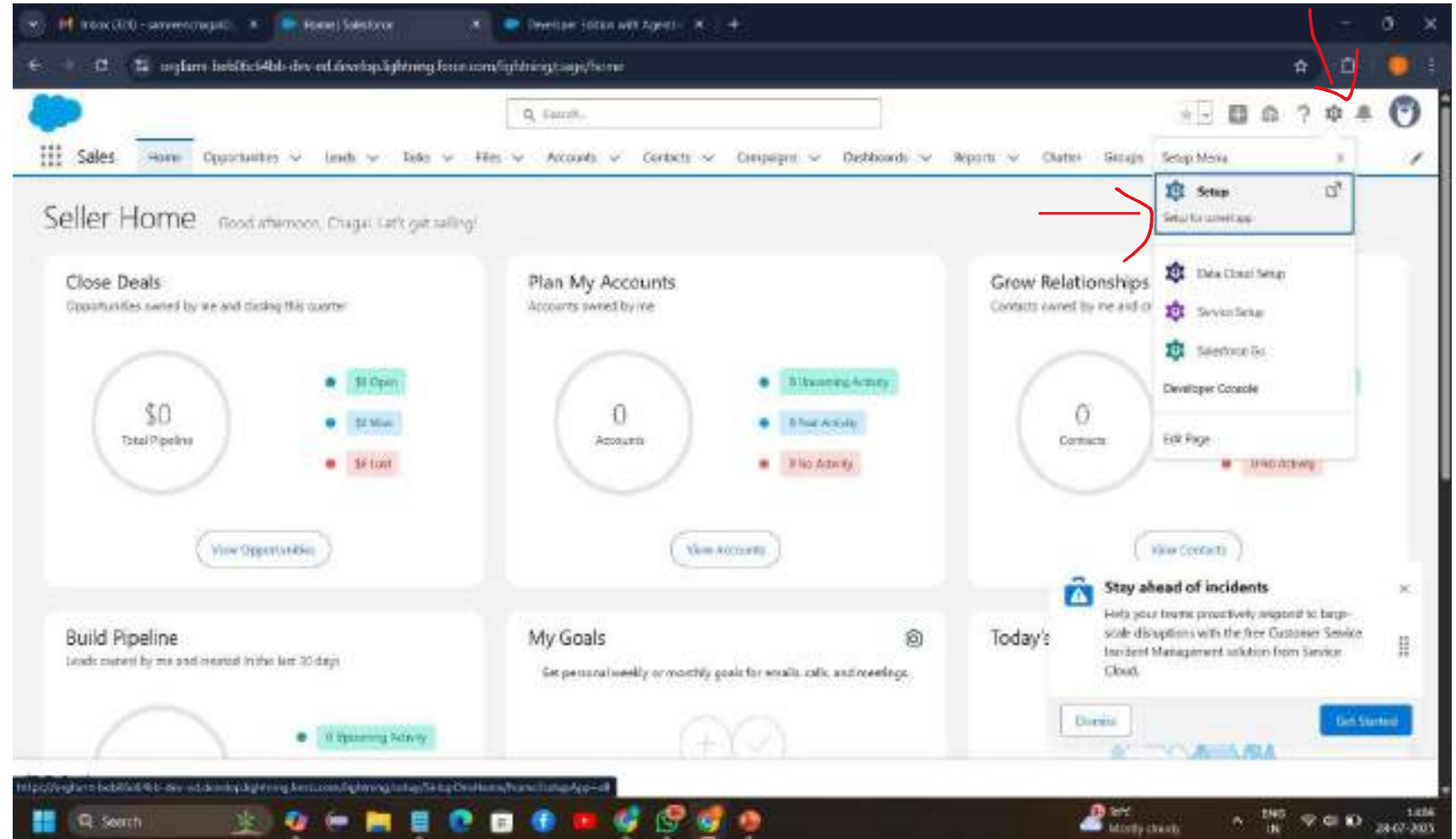
Inventory

Marketing Campaign

Object - HandsMen Customer

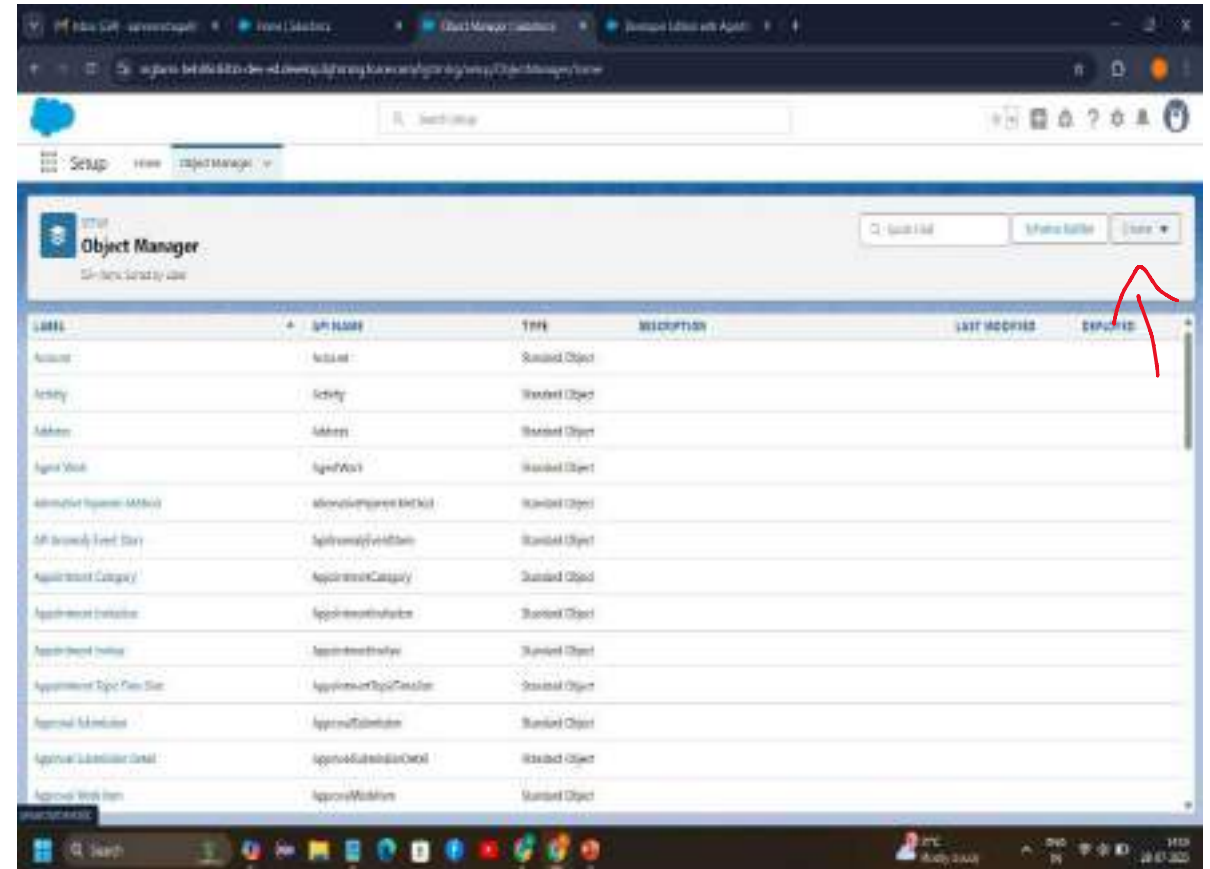
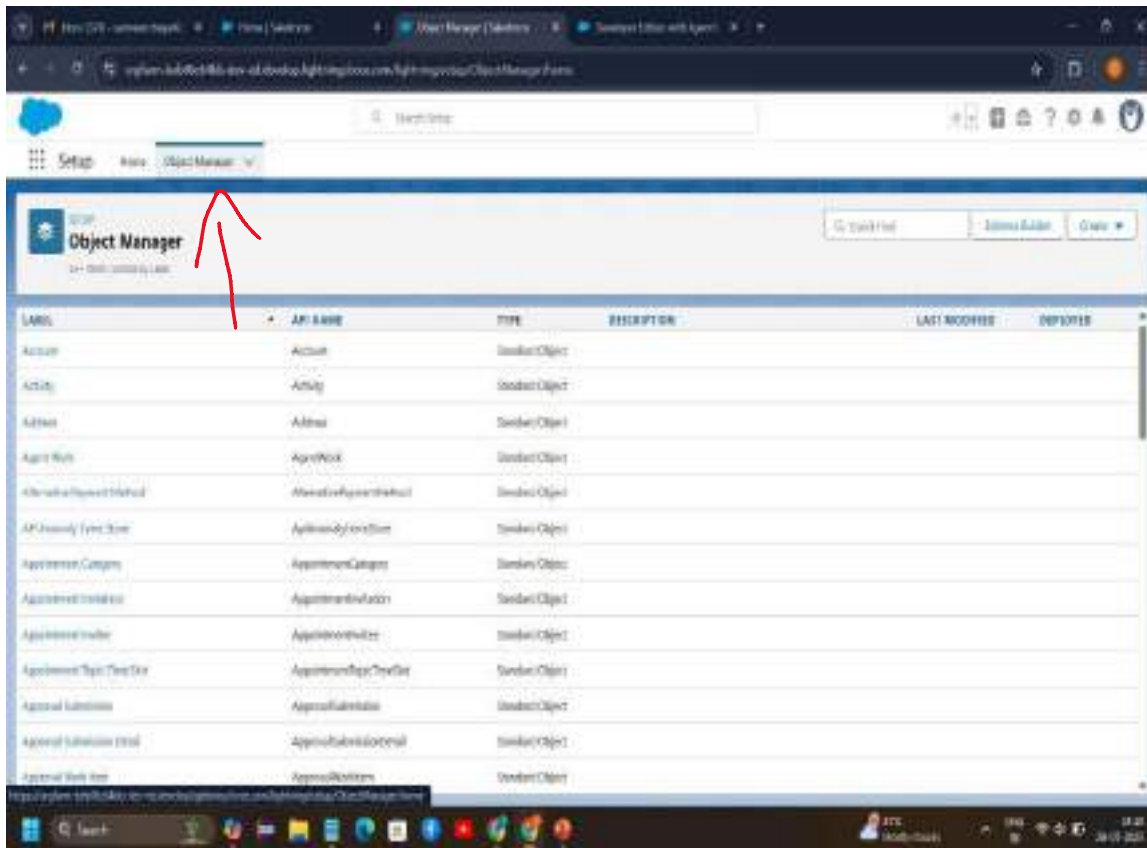
Description

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 shows 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'. 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 options for 'Custom, Selective Help Setting' and 'Custom Name'. 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 Windows taskbar at the bottom shows the date as 26-07-2015 and the time as 14:17.

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 includes a search bar at the top. The main content area is divided into several sections:

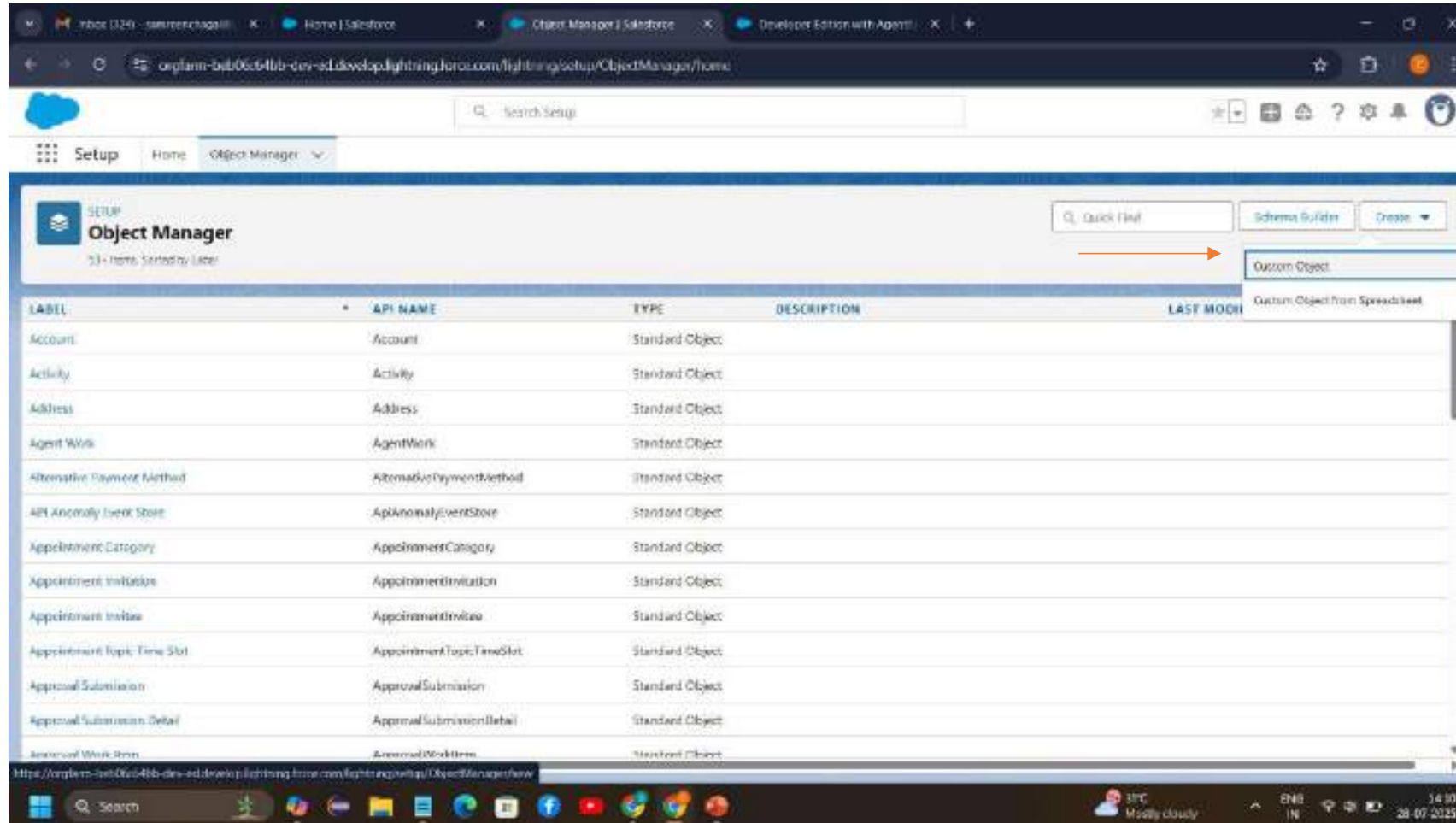
- Allow Reports:** This section contains several checkboxes. The 'Allow Reports' checkbox is checked and highlighted with an orange arrow.
- Object Classification:** This section explains that when these settings are enabled, the object is classified as an Enterprise Application object. It includes checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access', all of which are checked.
- Deployment Status:** This section includes checkboxes for 'In Development' and 'Deployed'. The 'Deployed' checkbox is checked.
- Search Status:** This section explains that when this setting is enabled, users can find records of this object type when they search. The 'Allow Search' checkbox is checked and highlighted with an orange arrow.
- Object Creation Options (Available only when custom object is first created):** This section includes checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object', both of which are unchecked.

At the bottom of the page, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The 'Save' button is highlighted with a red border and an orange arrow.

Create HandsMen Product 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 browser address bar displays the URL: <https://org1am-5ab06c64bb-dev-ed.developer.lightning.force.com/lightning/setup/ObjectManager/home>. The page title is "Object Manager". The navigation bar includes "Setup", "Home", and "Object Manager". The main content area shows a table of objects with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. The table lists various standard objects like Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invite, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, and Approval Work Item. On the right side, there is a "Create" dropdown menu with an orange arrow pointing to it. The dropdown menu is open, showing options: "Custom Object" and "Custom Object from Spreadsheet".

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 Invite	AppointmentInvite	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 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 displays the Salesforce 'New Custom Object' configuration page. The browser address bar shows the URL: `orgform-bet06c4bb-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`. The page header includes a 'Search Setup' bar and navigation tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'New Custom Object' and contains the 'Custom Object Information' section. This section includes fields for 'Label' (HandsMen Product), 'Plural Label' (HandsMen Products), 'Object Name' (HandsMen_Product), and a 'Description' text area. Below these fields are checkboxes for 'Show with visual force' and 'Customizable Help Settings'. The 'Enter Record Name Label and Format' section is also visible, showing 'Record Name' (HandsMen Product Name) and 'Data Type' (Text). Red arrows highlight the 'Label' and 'Record Name' fields. The bottom of the page shows a Windows taskbar with various application icons and a system tray displaying weather and time.

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

The screenshot shows the Salesforce 'New Custom Object' setup page. The browser tabs include 'Inbox (3/4) - janneedhagale', 'Home | Salesforce', 'New Custom Object | Setup', 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 has a 'Setup' tab selected in the navigation bar. The main content area is titled 'New Custom Object' and contains several sections:

- Allow Reports:** Includes checkboxes for 'Allow Reports' (checked), 'Allow Activities', 'Track Field History', 'Allow in Chatter Group', and 'Enable Upselling'.
- Object Classification:** Includes a note about object classification and checkboxes for 'Allow Sharing' (checked), 'Allow Bulk API Access' (checked), and 'Allow Streaming API Access' (checked).
- Deployment Status:** Includes checkboxes for 'In Development' and 'Deployed' (checked).
- Search Status:** Includes a note about search and a checkbox for 'Allow Search' (checked).
- Object Creation Options (Available only when custom object is first created):** Includes checkboxes 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 form are three buttons: 'Save', 'Save & New', and 'Cancel'. The Windows taskbar at the bottom shows the date as 28-07-2025 and the time as 14:30.

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

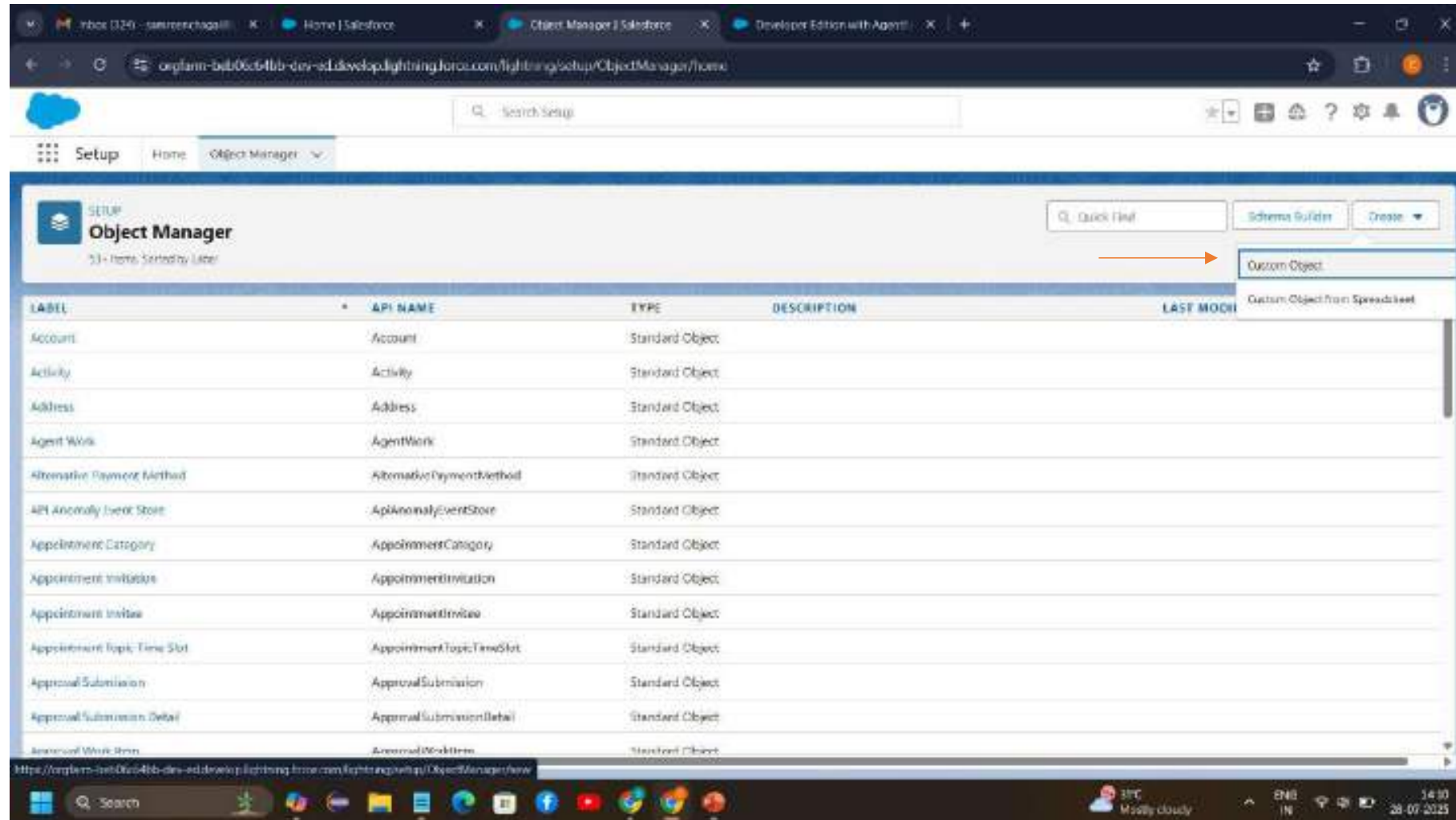
Display Format → O-{0000}

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

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 created as an enterprise application object. When these settings are disabled, the object is classified as a Light Application object. [Learn more](#)


☒ Allow Sharing
☒ Allow Bulk API Access
☒ Allow Streaming API Access

Deployment Status [What is this?](#)
☐ 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 

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

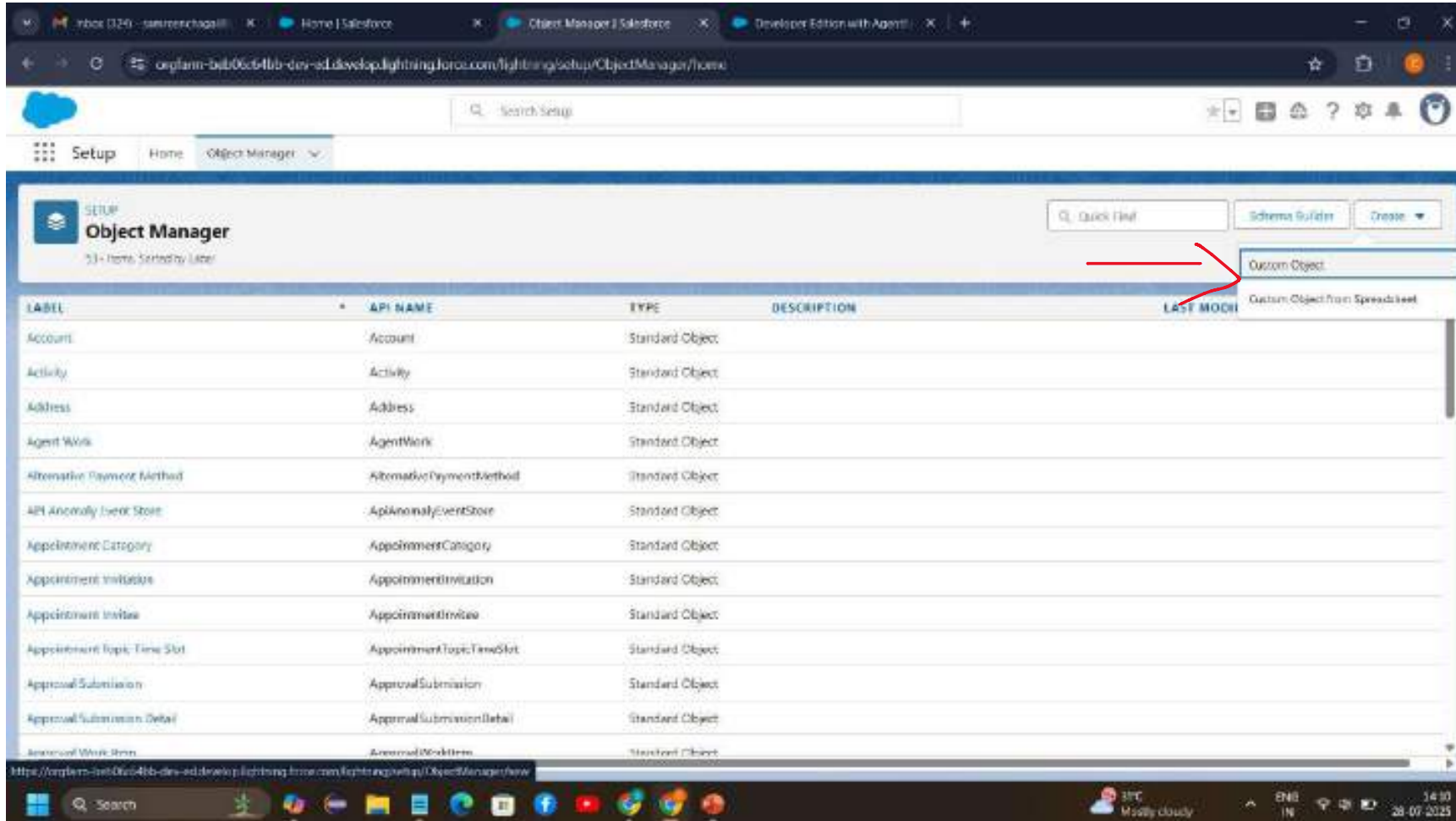


Windows taskbar: Search, File Explorer, Edge, Teams, Outlook, Chrome, Firefox, VLC, Spotify, OneDrive, Task View, Settings, Power, Network, Volume, 14:31, 28-07-2023, EPC Partly sunny

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. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Object Manager' header is visible. On the right side of the header, there's a 'Quick Find' search bar, a 'Schema Builder' button, and a 'Create' button. A red arrow points to the 'Create' button, which has a dropdown menu open showing 'Custom Object' and 'Custom Object from Spreadsheet'. Below the header, there's a table listing various standard objects. The table has 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 for the singular label and 'Inventories' for the plural label. The 'Object Name' is 'Inventory'. The 'Record Name' is 'Inventory Name'. The 'Data Type' is 'Auto Number', with a warning about high volume of records. The 'Display Format' is '1-{0000}' and the 'Starting Number' is '001'. Arrows point to the 'Label' and 'Data Type' fields.

Label

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel/record: ☐

Object Name

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

Object Name: 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.

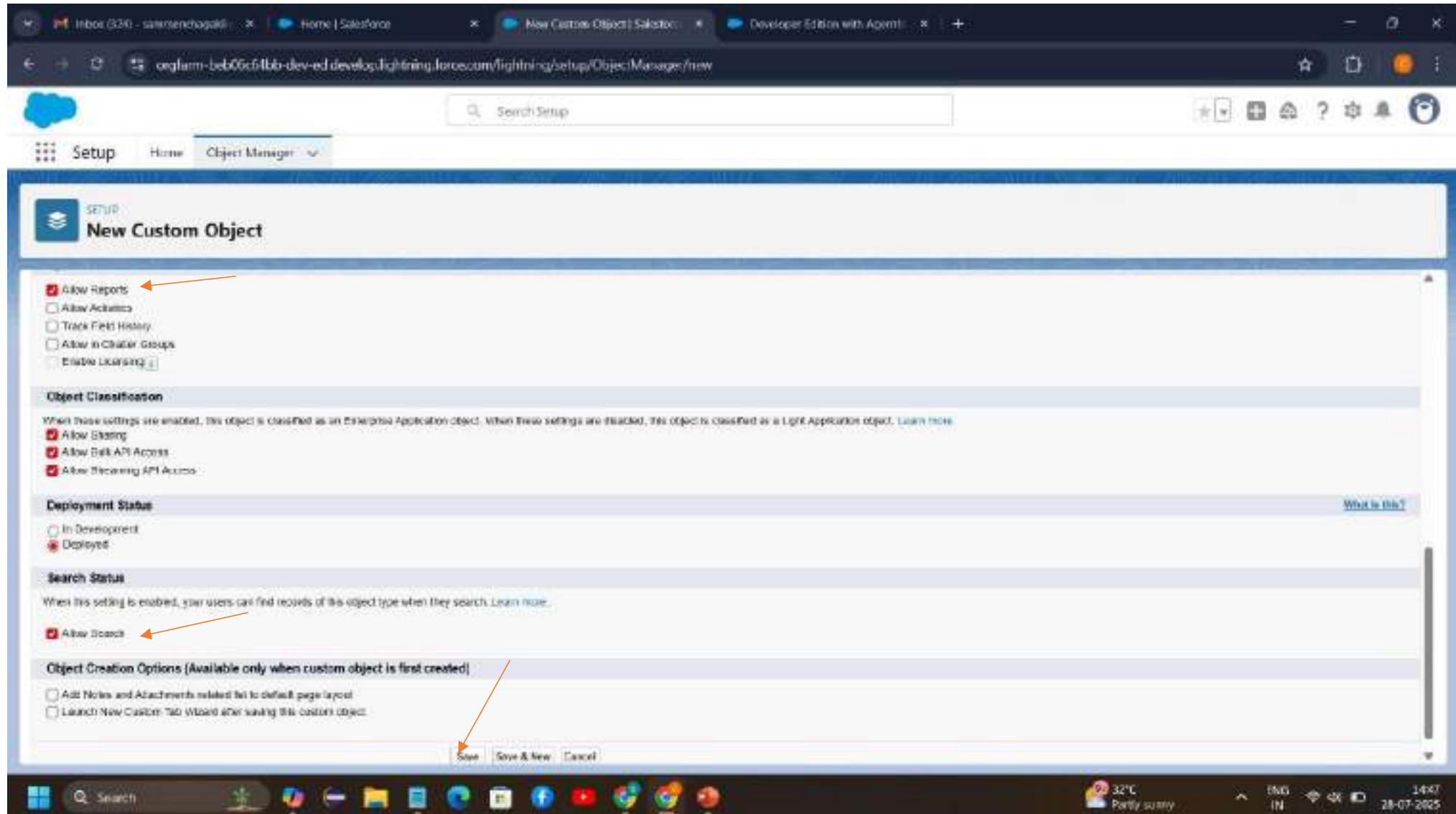
Record Name: Example: Account Name

Data Type: 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: Example: A-0000-000000000000

Starting Number:

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



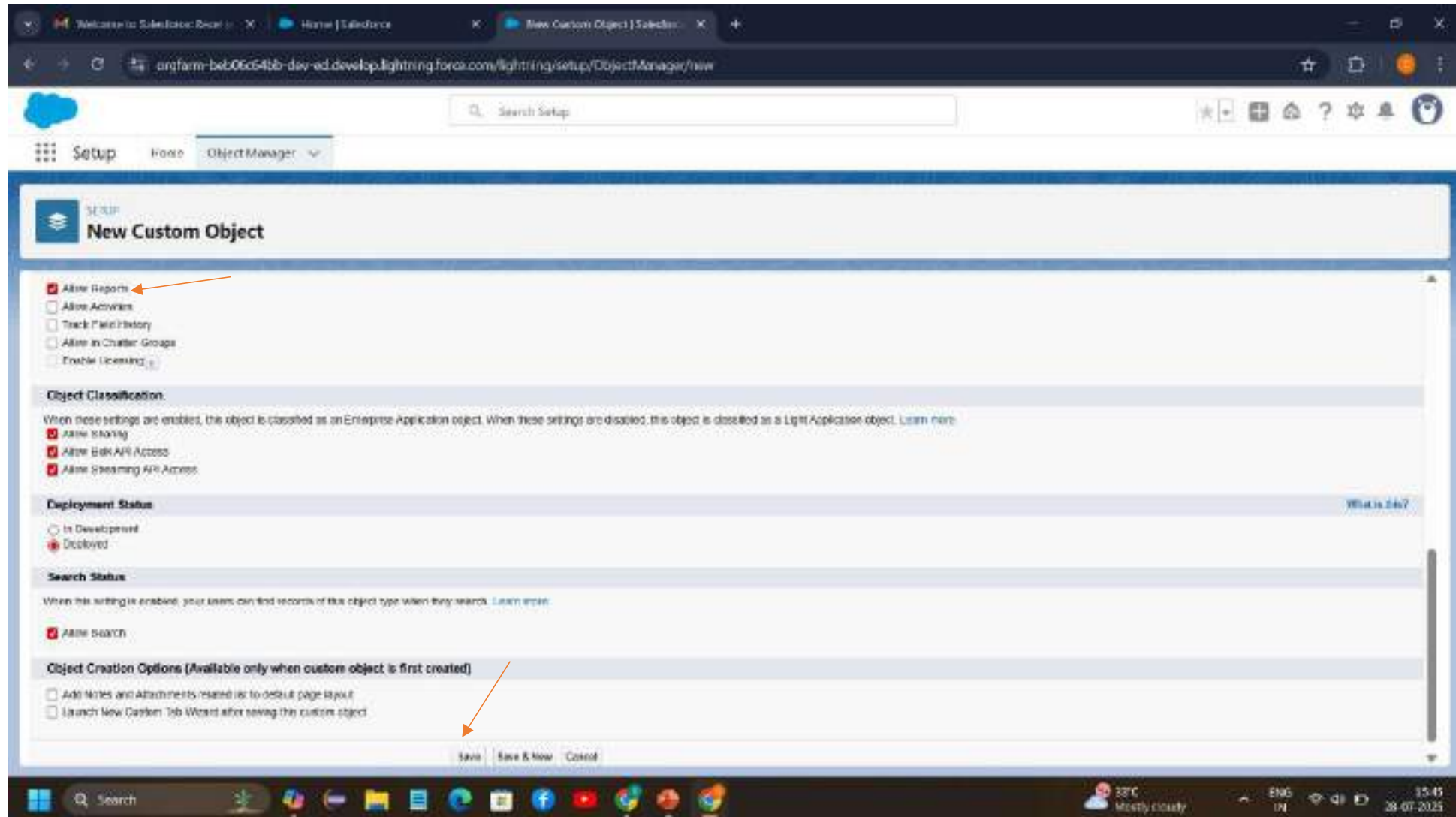
Object - Marketing Campaign

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 several sections. The first section is 'Standard Object Relationships', which includes fields for 'Label' (Marketing Campaign), 'Plural Label' (Marketing Campaigns), and 'Name with record' (checked). The second section is 'Object Name', which includes a field for 'Object Name' (Marketing Campaign) and a 'Description' field. The third section is 'Custom, Service, Help Setting', which includes a checkbox for 'Open for standard Salesforce.com Help & Training content' and a checkbox for 'Open a window using a third-party editor'. The fourth section is 'Enter Record Name Label and Format', which includes a 'Record Name' field (Marketing Campaign Number), a 'Data Type' dropdown (Auto Number), a 'Display Format' field (MC-{0000}), and a 'Starting Number' field (001). An orange arrow points to the 'Label' field, and another orange arrow points to the 'Display Format' field.

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

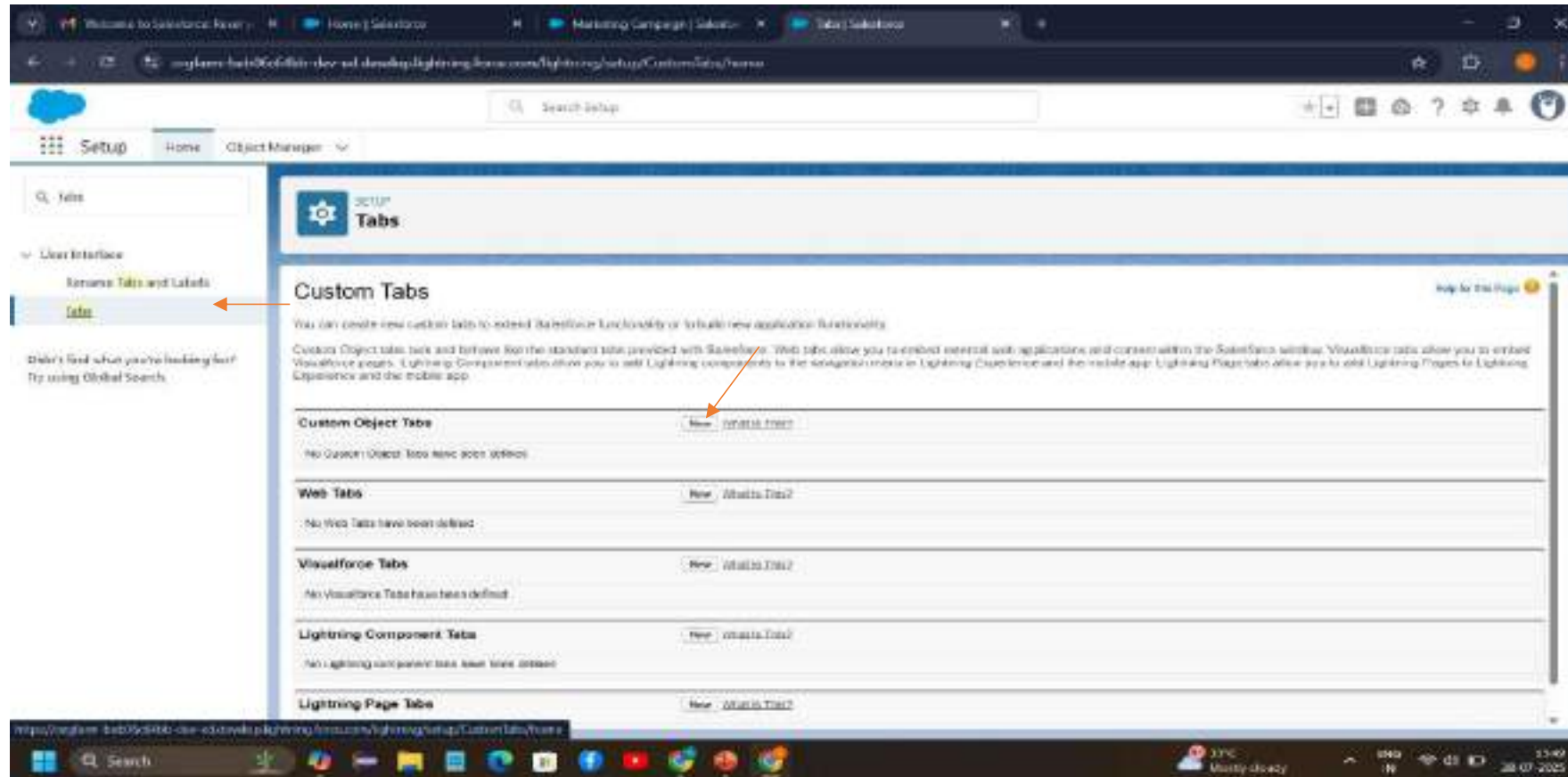


Data Management - Tabs

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 shows the Salesforce Setup interface for creating a new custom object tab. The browser address bar displays a URL for the Lightning Setup page. The left sidebar shows the 'Setup' menu with 'User Interface' expanded, and 'Tabs' selected. The main content area is titled 'New Custom Object Tab' and shows 'Step 1 of 3: Enter the Details'. The 'Object' dropdown is set to 'HandsMen Customer' and the 'Tab Style' is set to 'Classic'. An orange arrow points to the 'Object' dropdown. The 'Optional' section for 'Home Page Custom Link' is set to 'None'. The 'Description' field is empty. The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 15:32 on 28-07-2025.

Setup
Home
Object Manager

Search Setup

tabs

User Interface
Rename Tabs and Labels
Tabs

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

SETUP
Tabs

New Custom Object Tab

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 else.

Object HandsMen Customer

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

Next Cancel

Next (Add to profiles page) keep it as default

The screenshot shows the Salesforce Setup interface for a custom tab. The browser address bar indicates the URL: `orgfarm-b6b6c64bb-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FpreJHL%3D%252Fsetup%252Fui%252F...`. The left sidebar shows the 'Setup' menu with 'Home' and 'Object Manager' options. The main content area is titled 'Step 2. Add to Profiles' and includes a search bar for 'tabs'. Below the search bar, there are two radio buttons: 'Apply one tab visibility to all profiles' (selected) and 'Apply a different tab visibility for each profile'. A table lists various profiles and their corresponding tab visibility settings, all of which are set to 'Default On'.

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Analytics Cloud User	Default On
Authenticated Integration	Default On
Authenticated Website	Default On
Authenticated Website	Default On
EDI B2B Partner Portal User Profile	Default On
External Manager	Default On
Guest Org Data Proxy User	Default On
Guest: Marketing Profile	Default On
Guest: Sales Profile	Default On
Guest: Support Profile	Default On
Guest: Community Login User	Default On

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

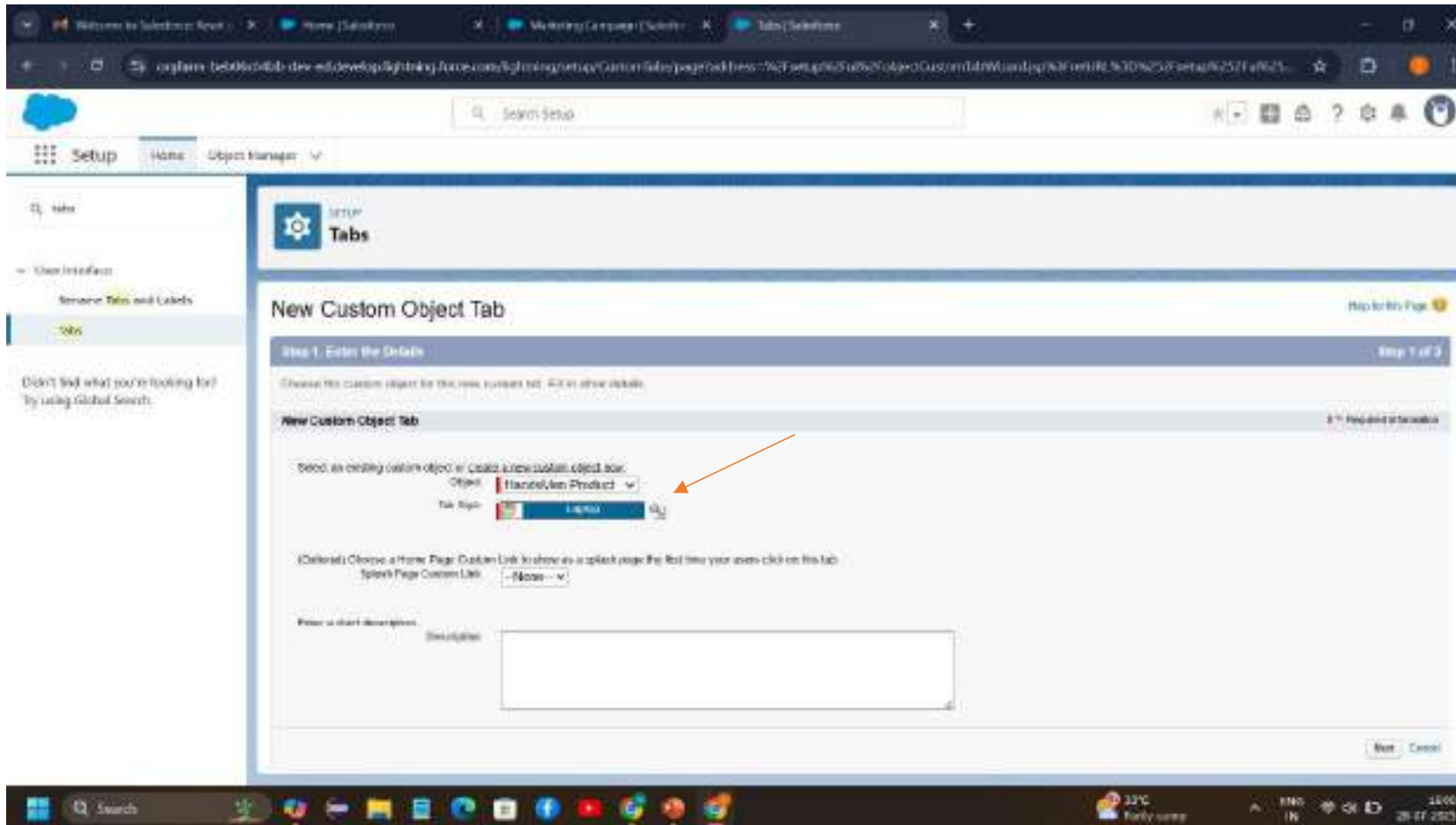
The screenshot shows the Salesforce Setup interface. The left sidebar contains the 'Setup' menu with 'User Interface' expanded, showing 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'Tabs' and displays a list of tabs with checkboxes for selection. The 'Sales Console' tab is highlighted. At the bottom right, there are 'Previous', 'Save', and 'Cancel' buttons. An orange arrow points to the 'Save' button.

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



The screenshot displays the Salesforce Setup interface. On the left, the navigation sidebar includes 'Setup' and 'Object Manager'. The main content area is titled 'Setup Tabs' and contains a list of Salesforce features with checkboxes for enabling tabs. The features listed are:

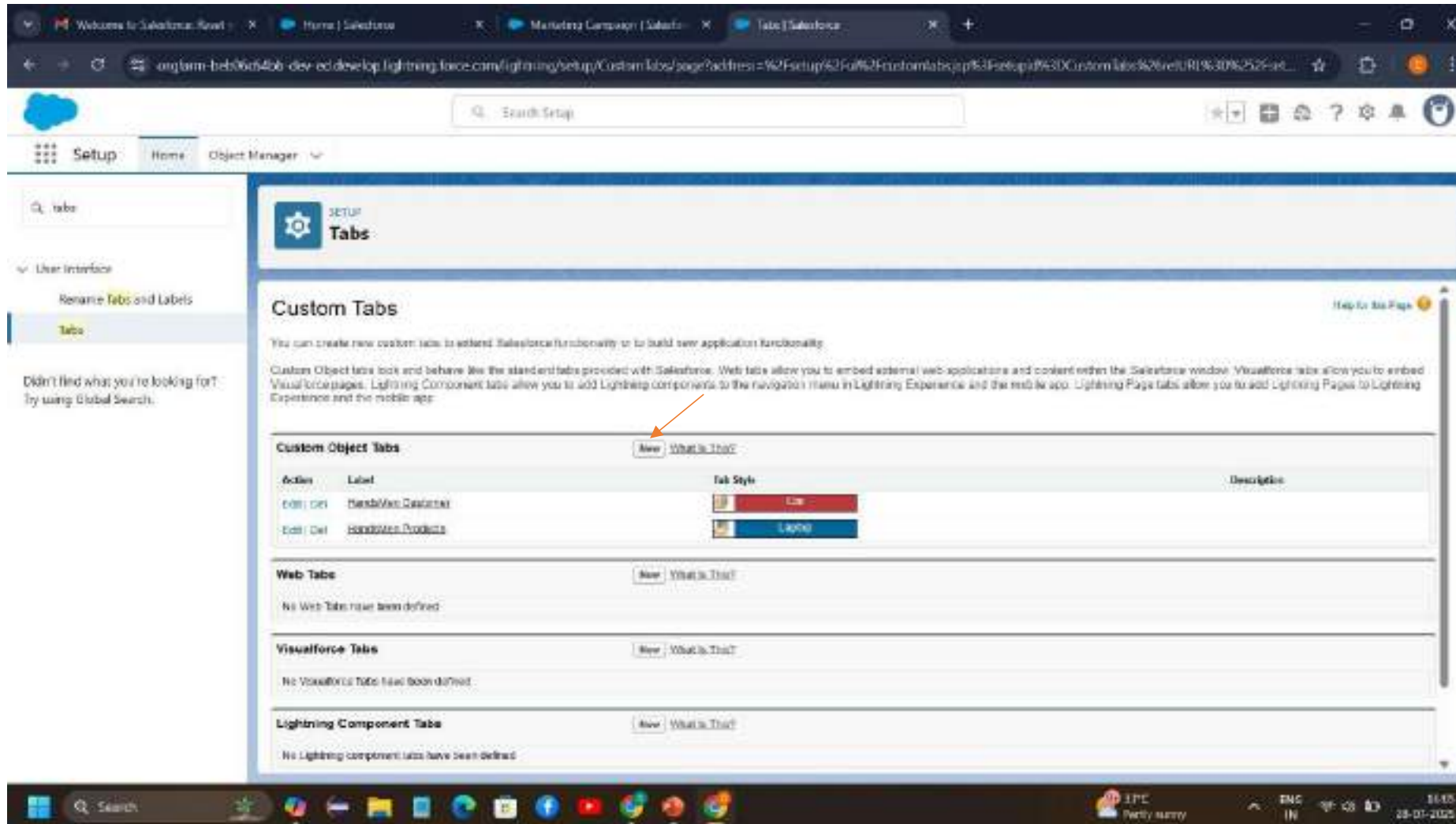
- Business Console (standard__LightningBusinessConsole)
- Service Console (standard__LightningService)
- Table (standard__LightningTable)
- Lightning Usage App (standard__LightningUsageApp)
- Digital Experiences (standard__ExperienceCloud)
- Queue Management (standard__QueueManagement)
- Event Manager (standard__EventManager)
- Subscription Management (standard__SubscriptionManagement)
- Sales Cloud Mobile (standard__SalesCloudMobile)
- IoT Solutions (standard__LightningIoT)
- Data Cloud (standard__Audience360)
- Approval (standard__Approval)
- My Service Journey (standard__MyJourney)
- Salesforce Scheduler Setup (standard__LightningScheduler)
- Automation (standard__FlowApp)

At the bottom of the list, there is a checkbox labeled 'Apply tab to user: existing personal customizations'. The bottom of the screen shows the Windows taskbar with various application icons and the system clock.

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 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.

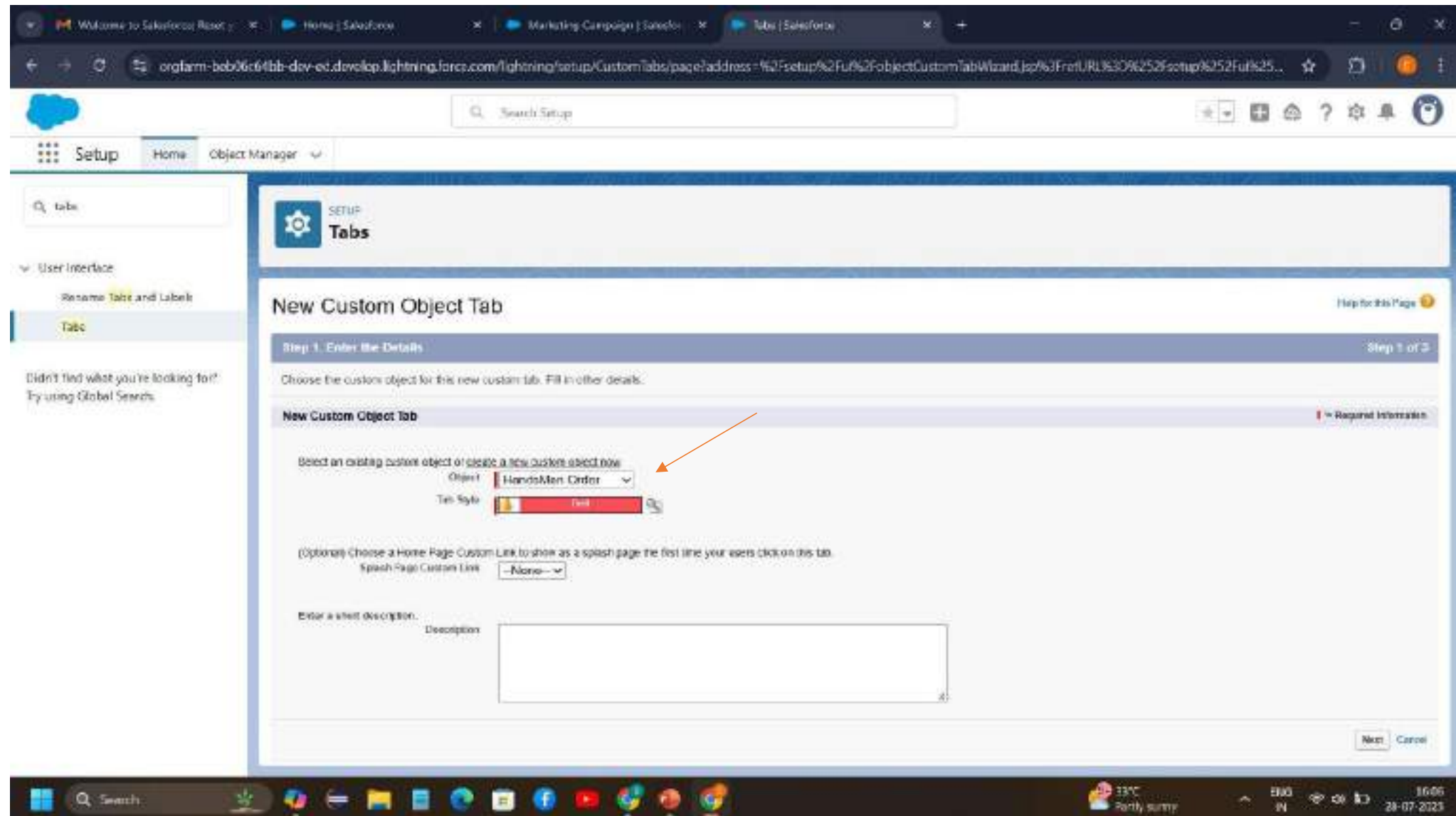
Visualforce Tabs

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	

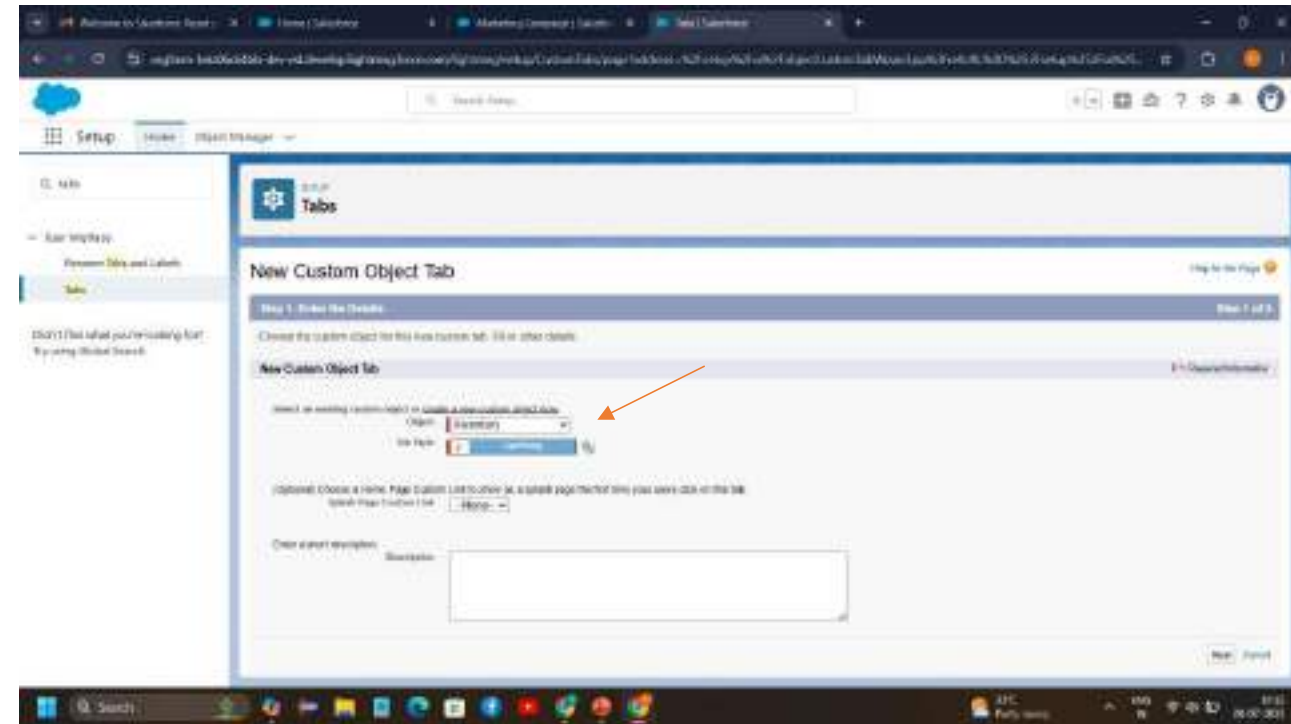
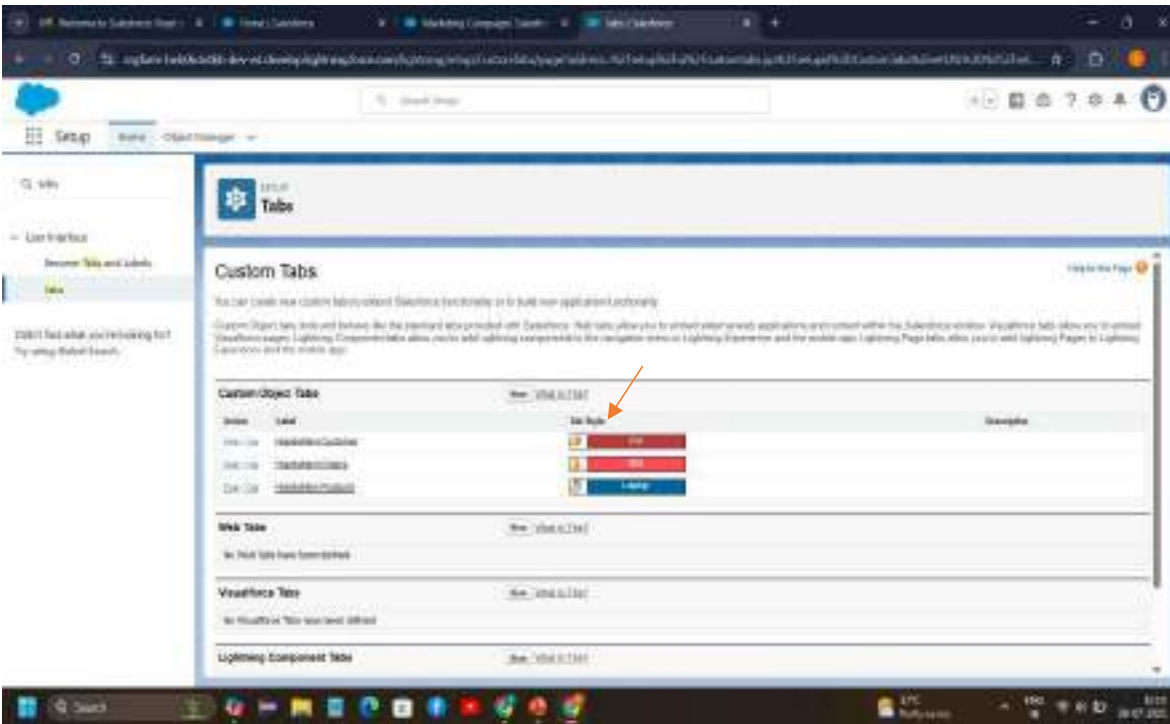
Previous Save Cancel

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.

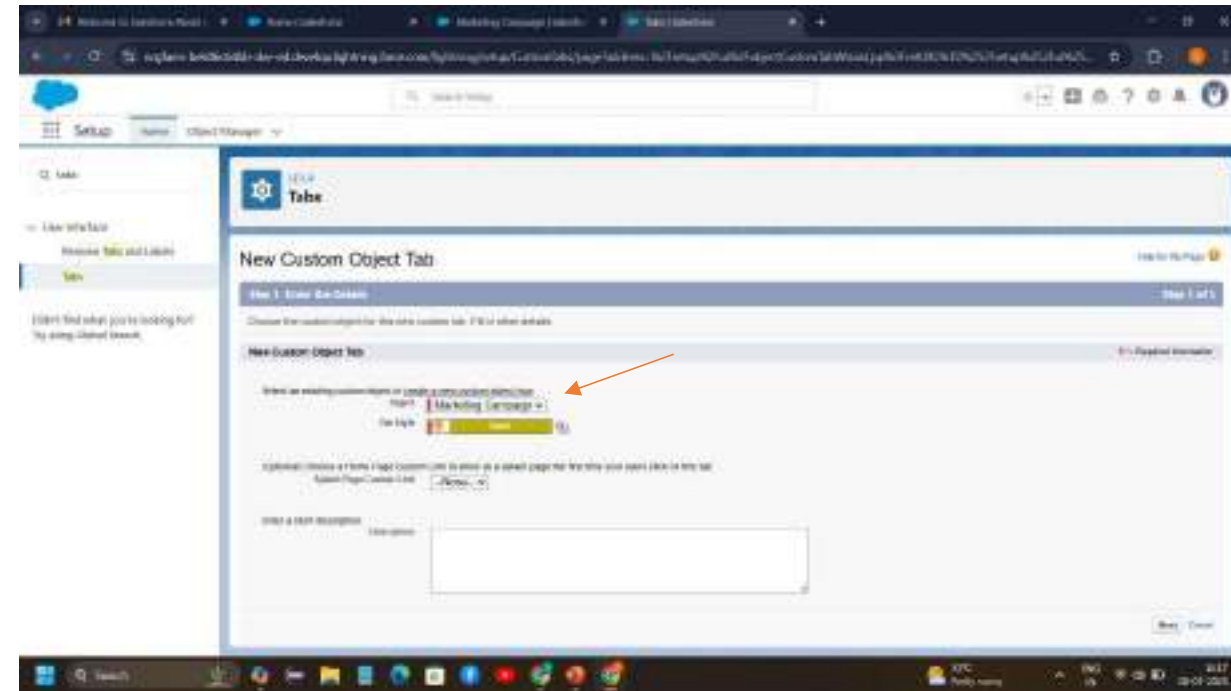
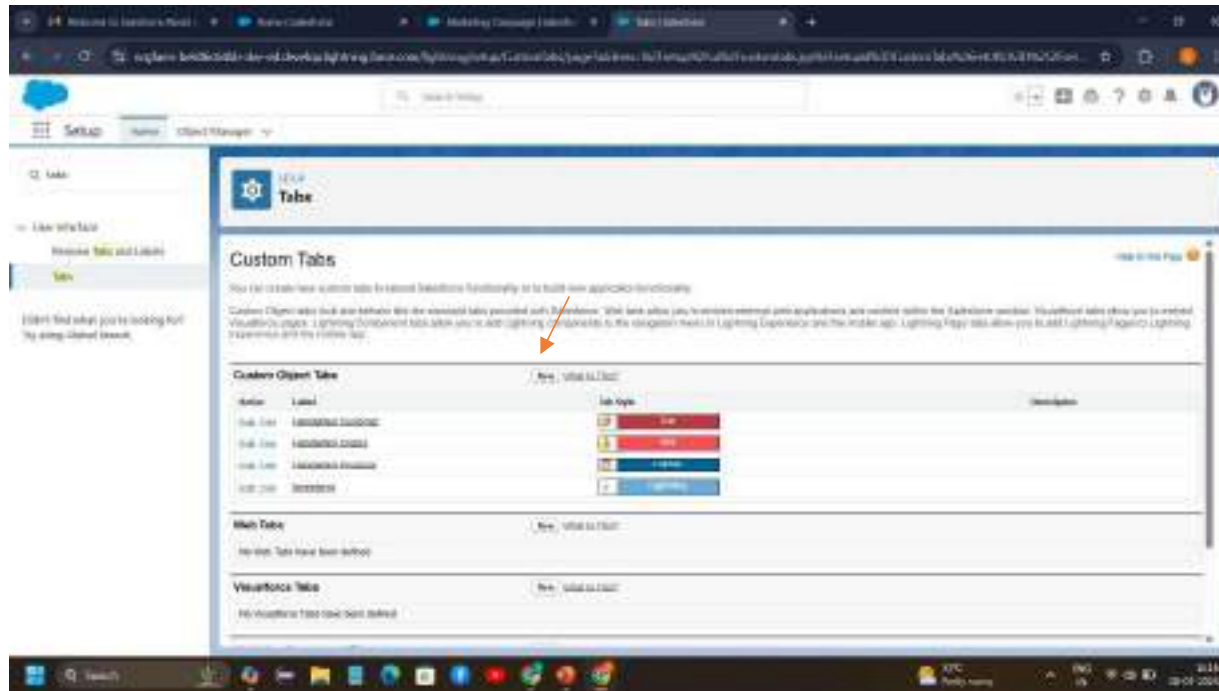


Creating a Custom Tab(Marketing Campaign)

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 13 apps. A red arrow points to the 'New Lightning App' button in the top right corner of the app list.

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	✓

- 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

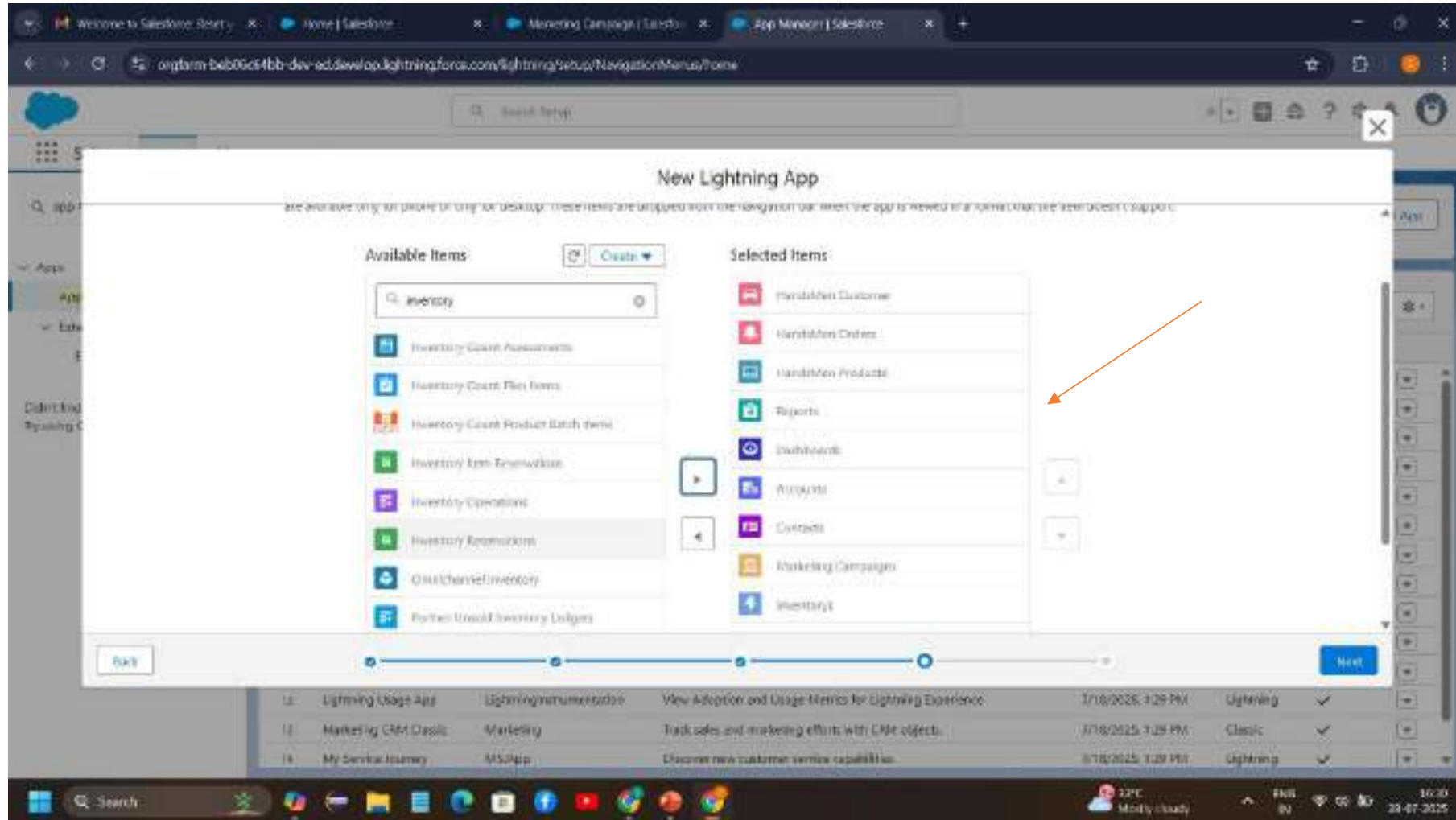
Image : optional (if you want to give any image you can otherwise not mandatory)

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' configuration window in Salesforce. The 'App Details & Branding' section is active. The 'App Name' field is highlighted with an orange arrow and contains the text 'HandsMen Threads'. The 'Developer Name' field also contains 'HandsMen Threads'. The 'Description' field contains 'HandsMen Threads'. The 'App Branding' section shows an 'Image' upload button and a 'Primary Color Hex Value' dropdown set to '#0070C2'. A 'Next' button is at the bottom right.

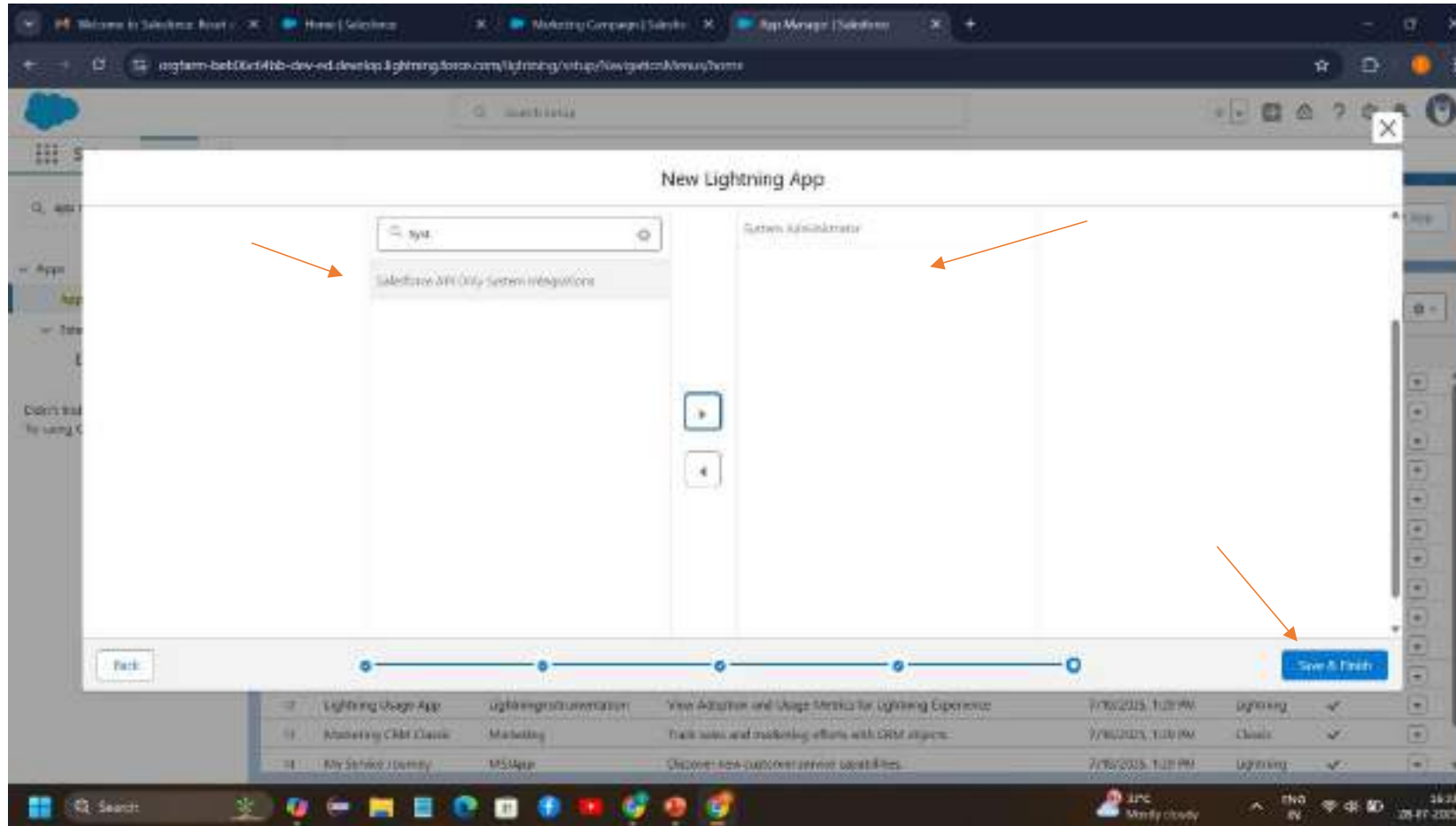
Item	Type	Description	Created By	Status
Lightning (Super App)	Aggregating Information	View Adoption and Usage Metrics for Lightning Experience	7/18/2025, 1:28 PM	Lightning
Marketing CRM Data	Marketing	Track sales and marketing efforts with CRM objects	7/18/2025, 1:28 PM	Classic
My Service Journey	NSIAps	Discover 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

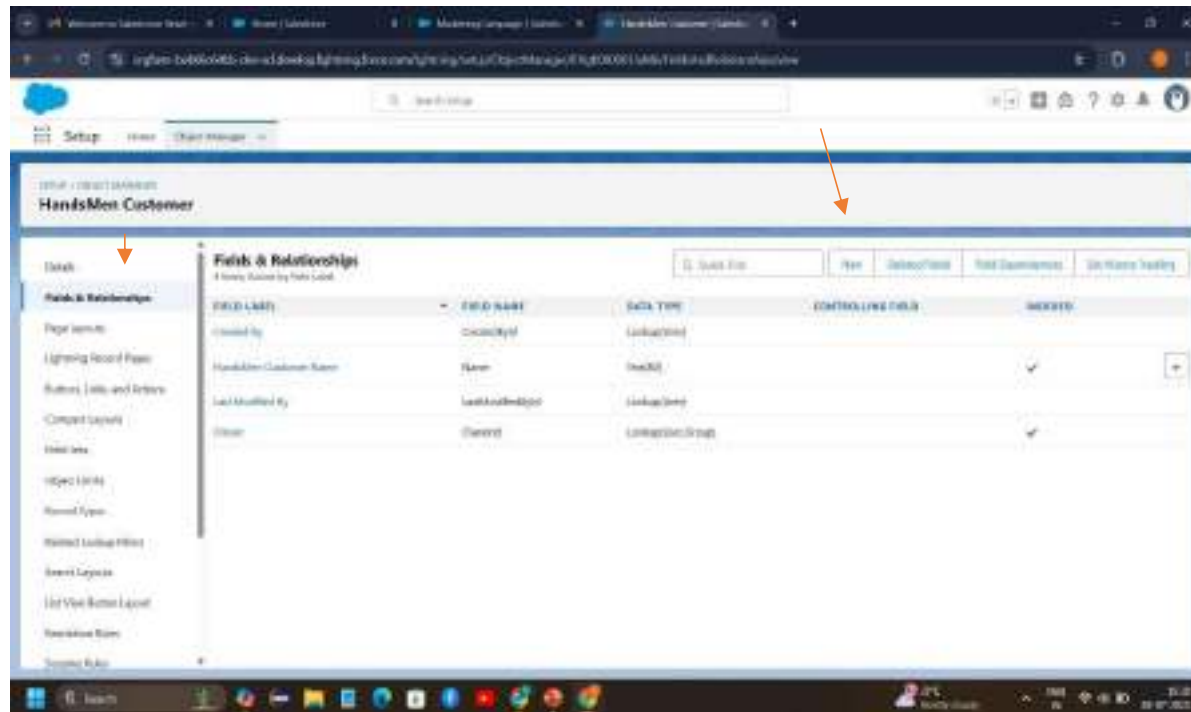
To create fields in an object:

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

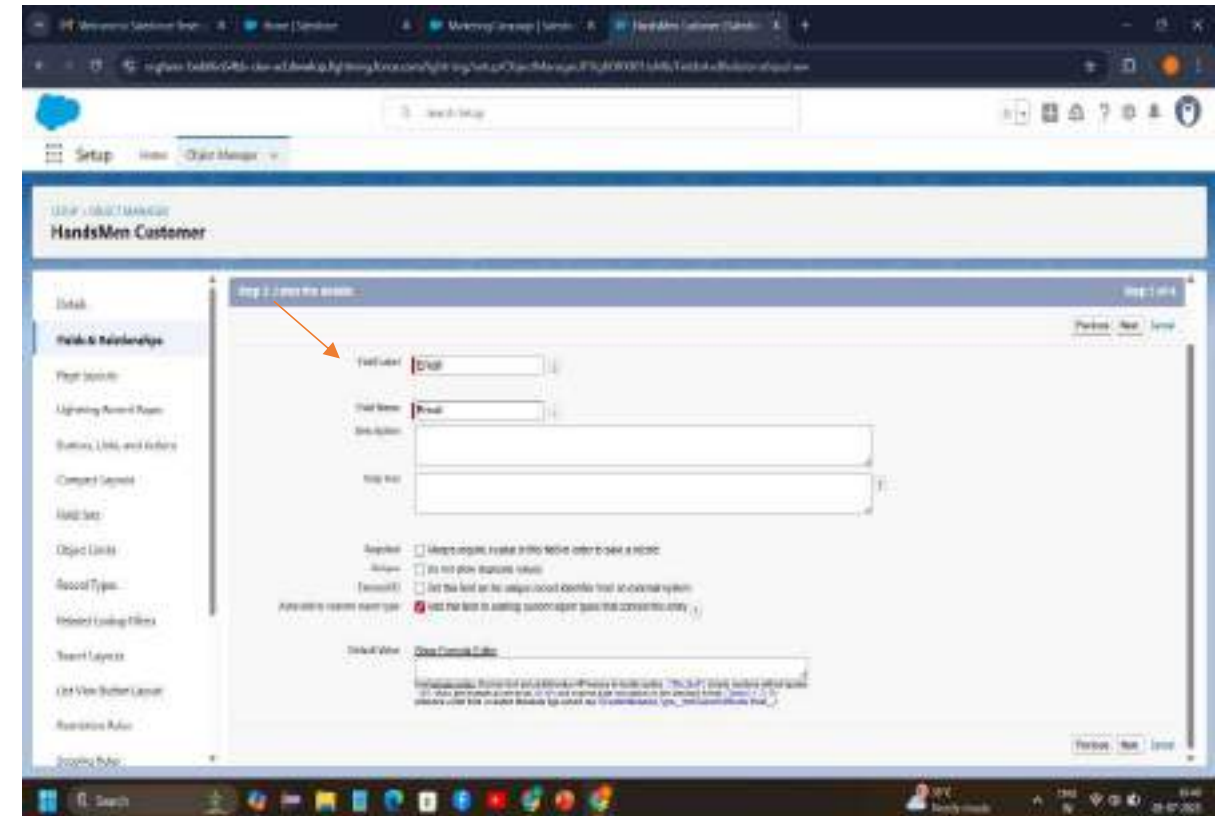
The screenshot displays the Salesforce Object Manager interface. At the top, there's a search bar with the text "Hands" entered. Below this, a table lists three custom objects: "HandsMen Customer", "HandsMen Order", and "HandsMen Product". The "HandsMen Customer" object is highlighted with an orange arrow pointing to its label in the table. Another orange arrow points from the search bar to the "Hands" text. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The "HandsMen Customer" object is a Custom Object, last modified on 7/28/2025, and is deployed.

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	✓

Now click on “Fields & Relationships” → New



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

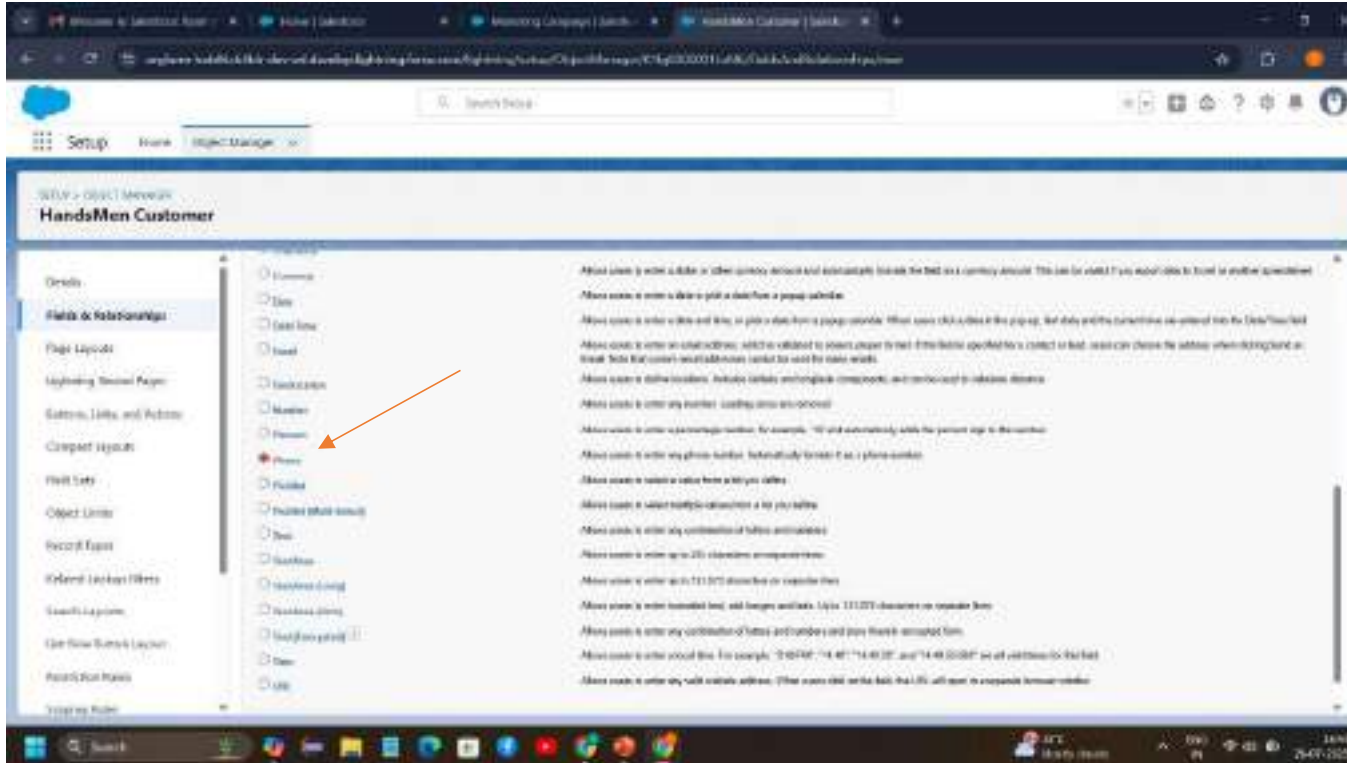


Creating Phone on HandsMen Customer Object

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.

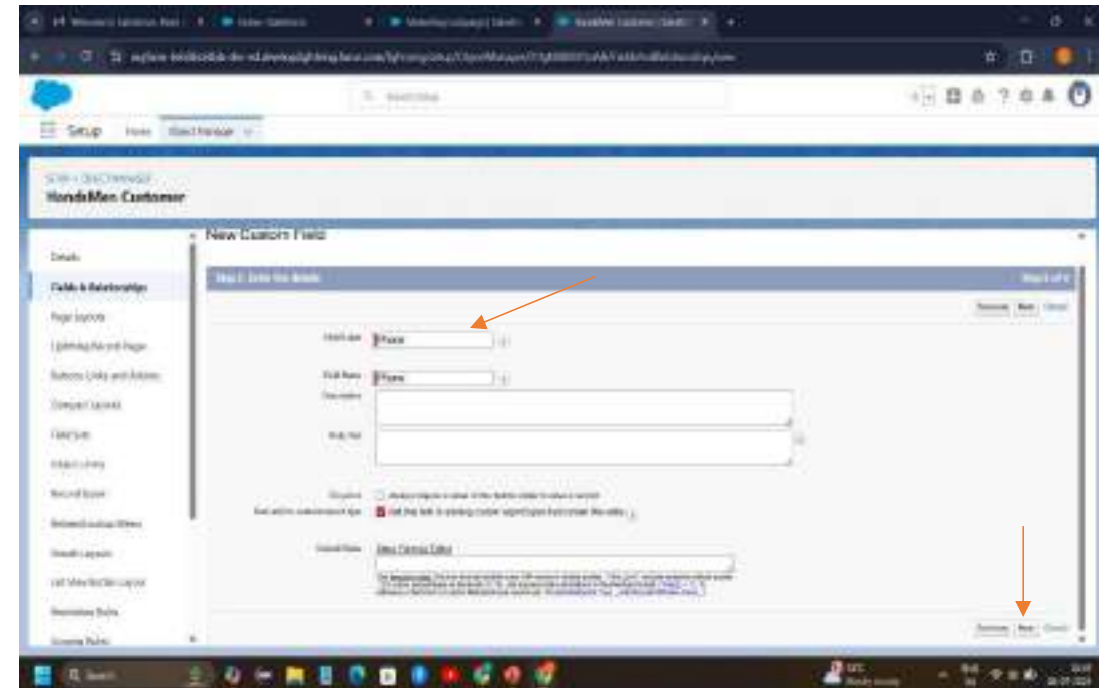


Fill the above as following:

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

The screenshot shows the Salesforce Object Manager interface for creating a new field on the 'HandsMen Customer' object. The 'Fields & Relationships' tab is selected, and the 'New' button has been clicked. The 'Field Label' is set to 'Loyalty Status'. The 'Values' section is configured to 'Enter values, with each value separated by a new line'. The values entered are 'Gold', 'Silver', and 'Bronze'. The 'Field Name' is 'Loyalty_Status'. The 'Required' checkbox is checked, and the 'Add this field to existing custom report types that contain this entity' checkbox is also checked. The 'Display values alphabetically, not in the order entered' and 'Use first value as default value' checkboxes are unchecked.

Field Label: Loyalty Status

Values: ☐ Use global picklist value set
☒ Enter values, with each value separated by a new line

Gold
Silver
Bronze

☐ Display values alphabetically, not in the order entered
☐ Use first value as default value
☒ Remove pointer to the values defined in the value set

Field Name: Loyalty_Status

Description:

Help Text:

Required: ☒ Add this field to existing custom report types that contain this entity

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.

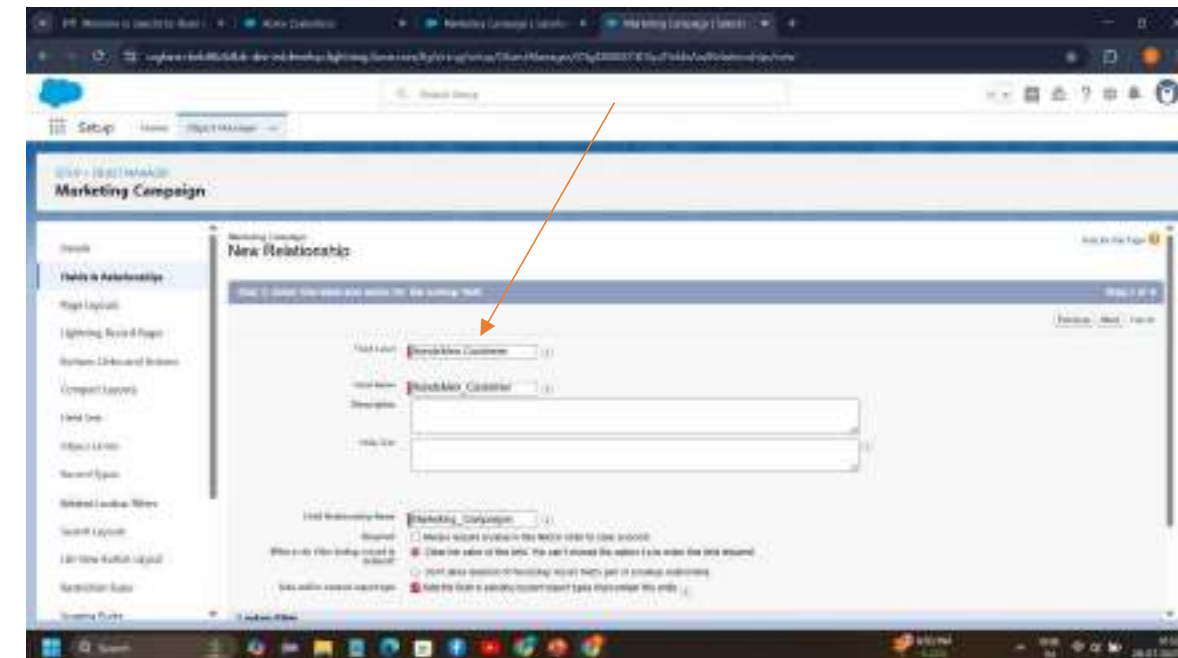
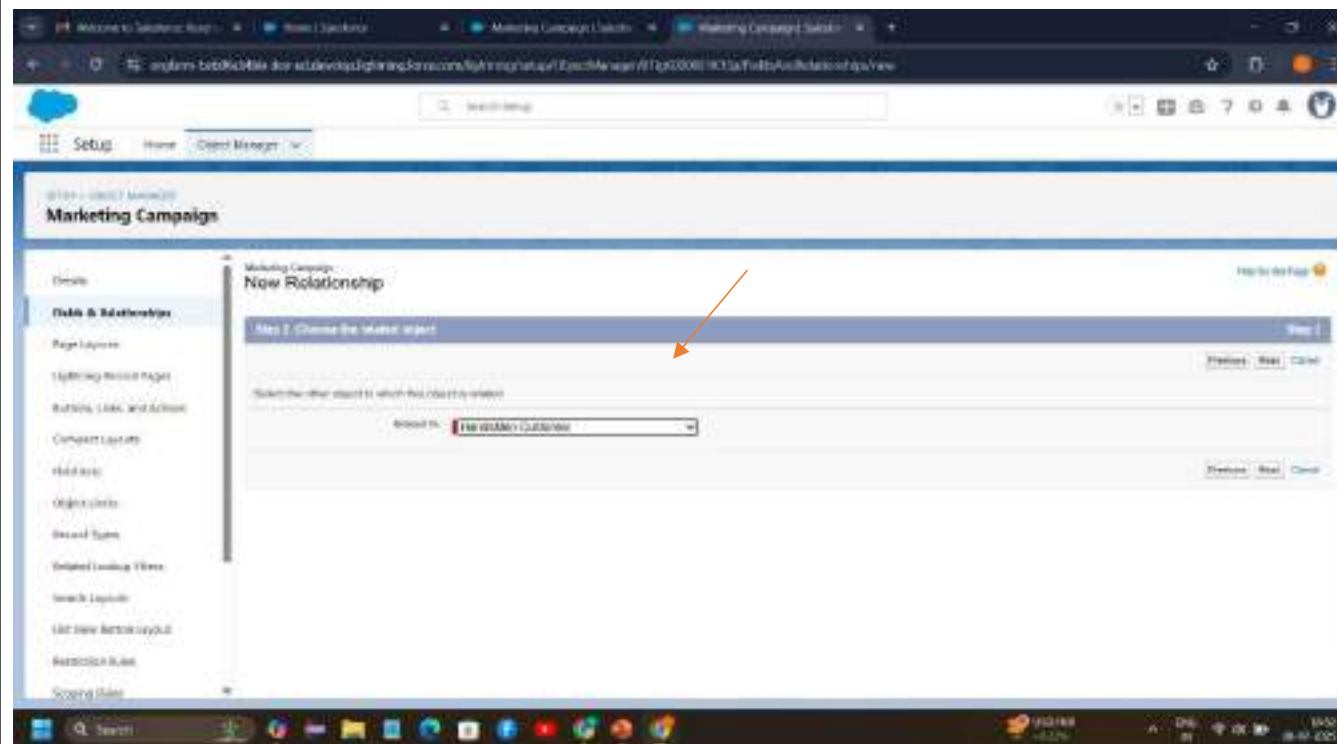
Click on fields & relationship → click on New.

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.

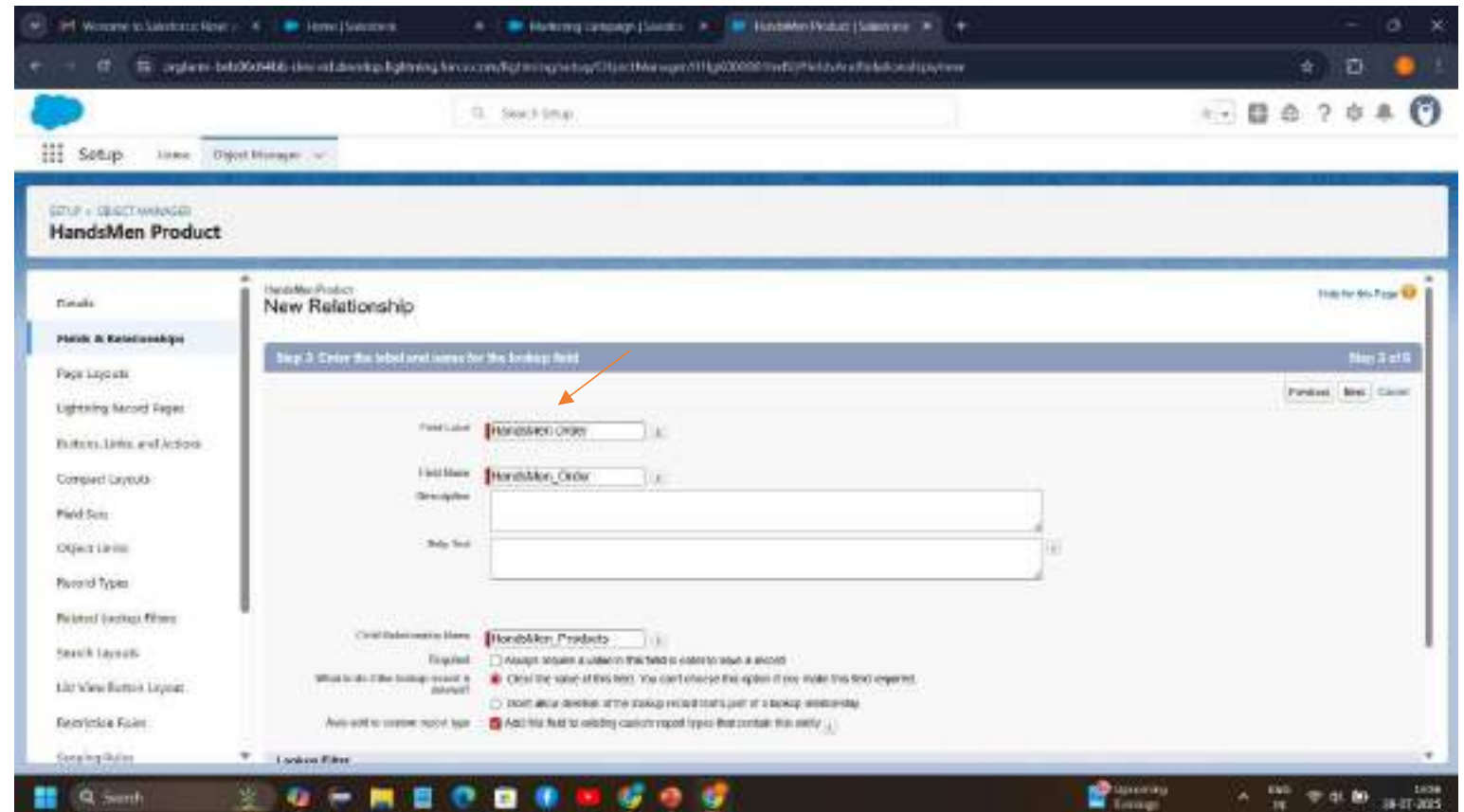
Click on fields & relationship → click on New.

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.

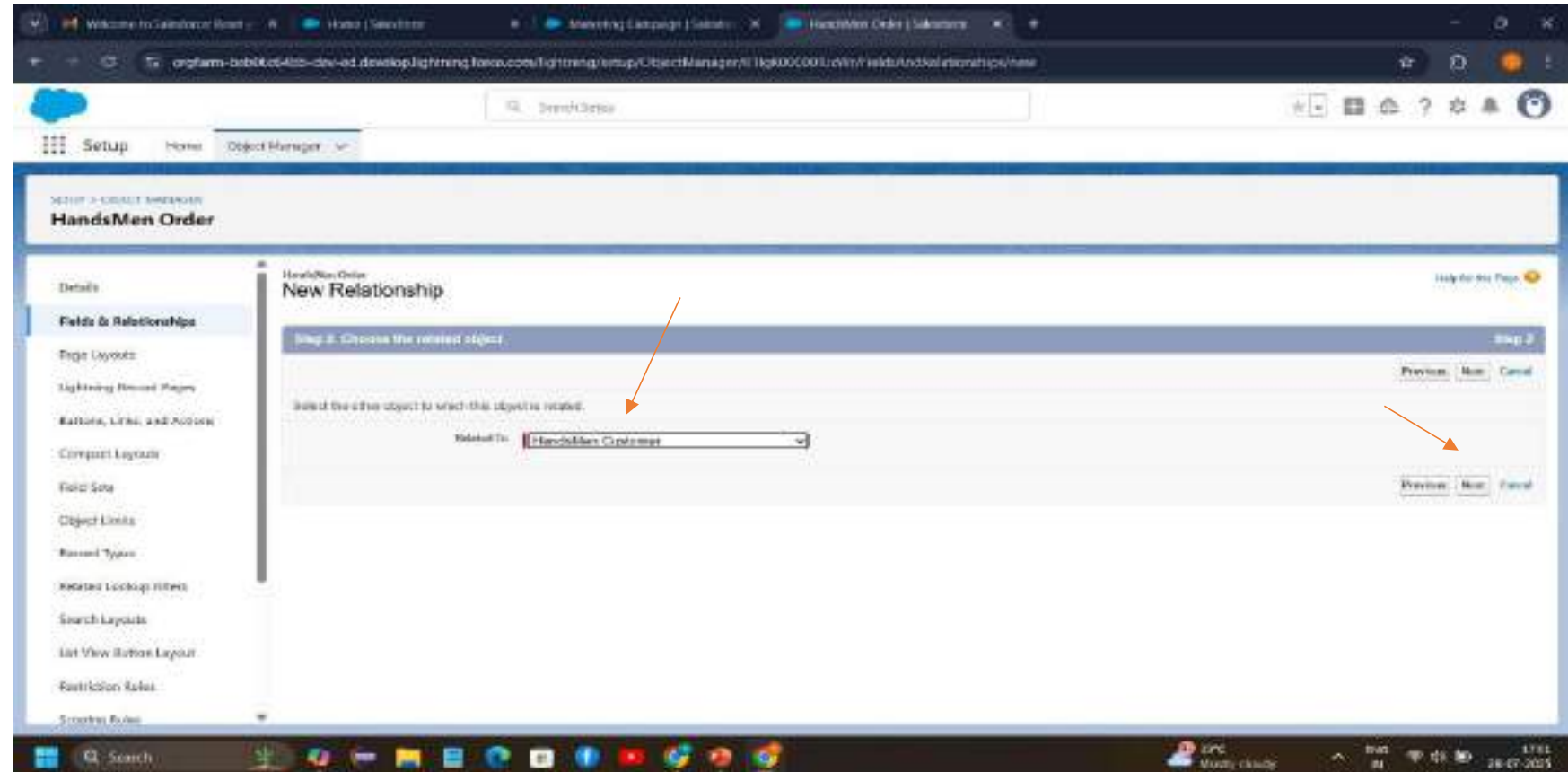
Click on fields & relationship → click on New.

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.

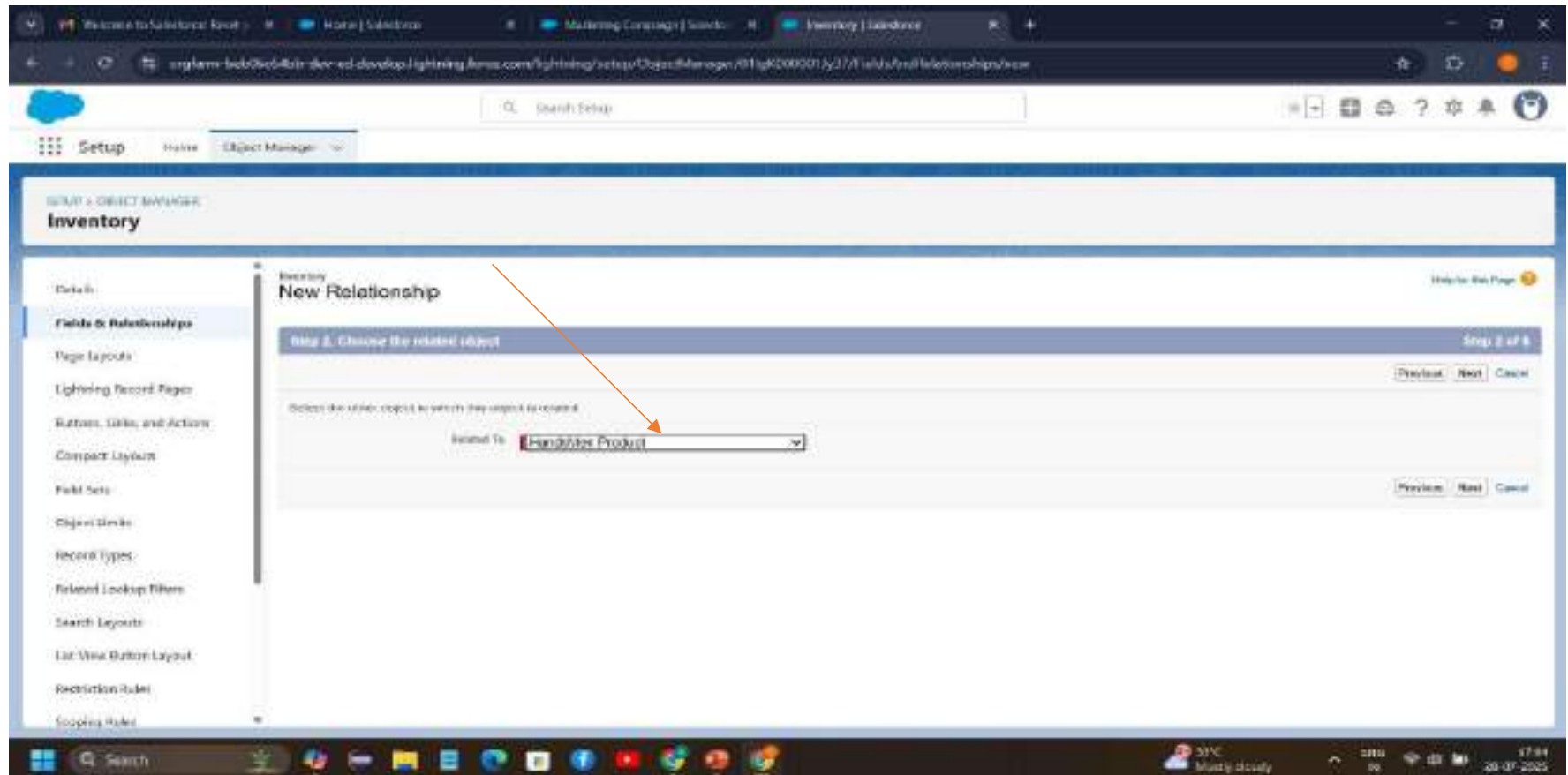
Click on fields & relationship → click on New.

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.



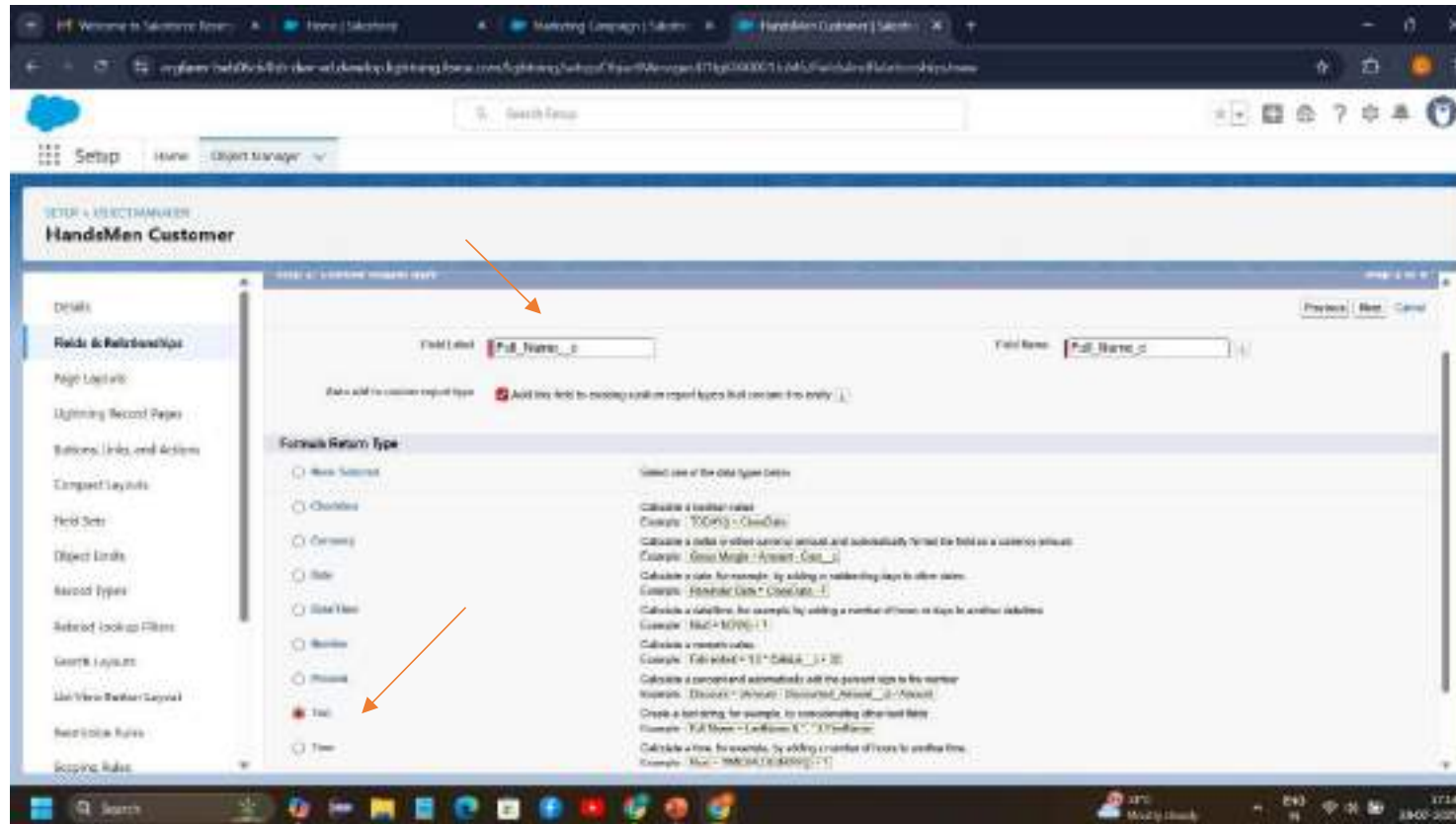
Formula Fields

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

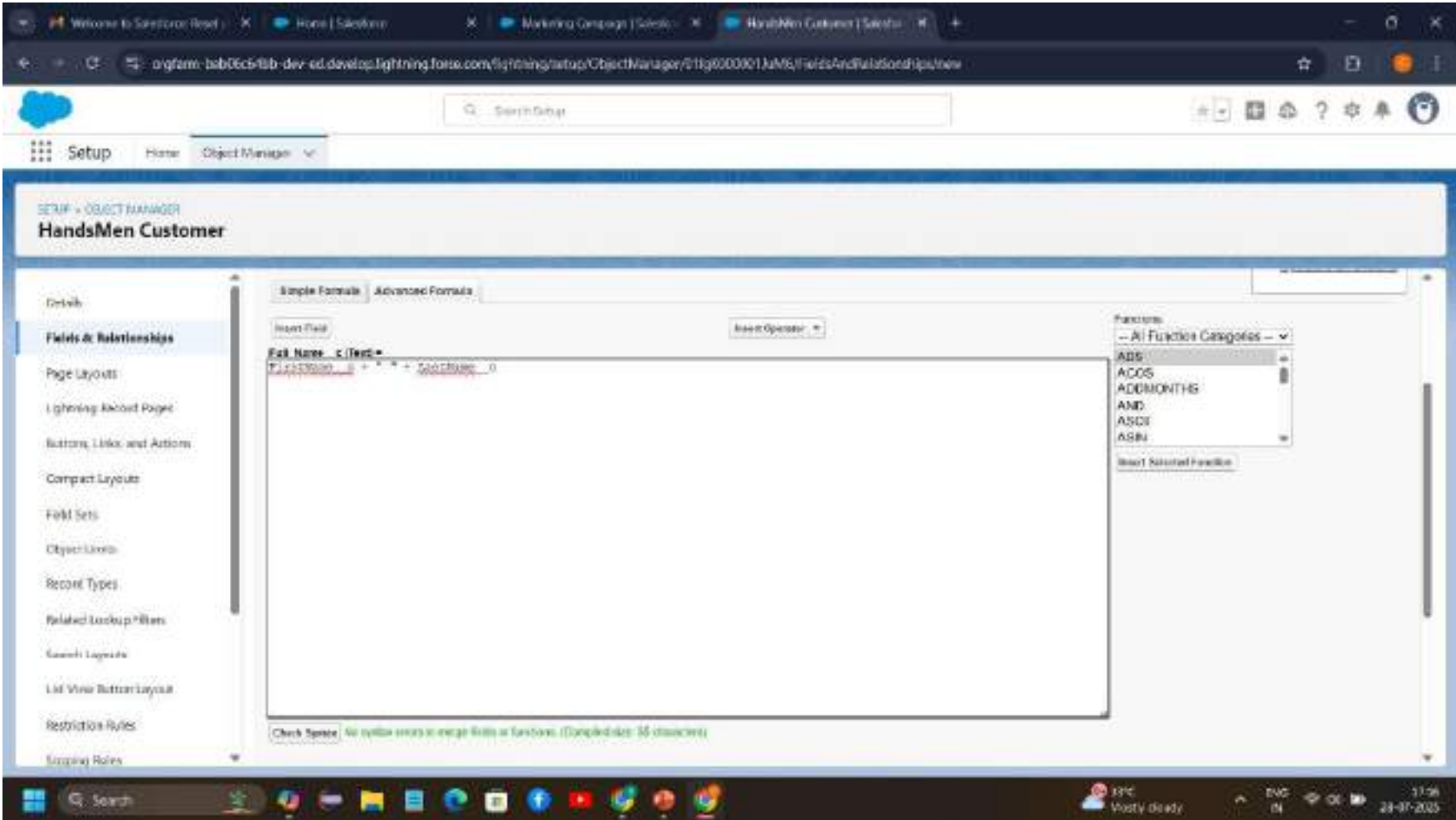
Click on fields & relationship → click on New.

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:

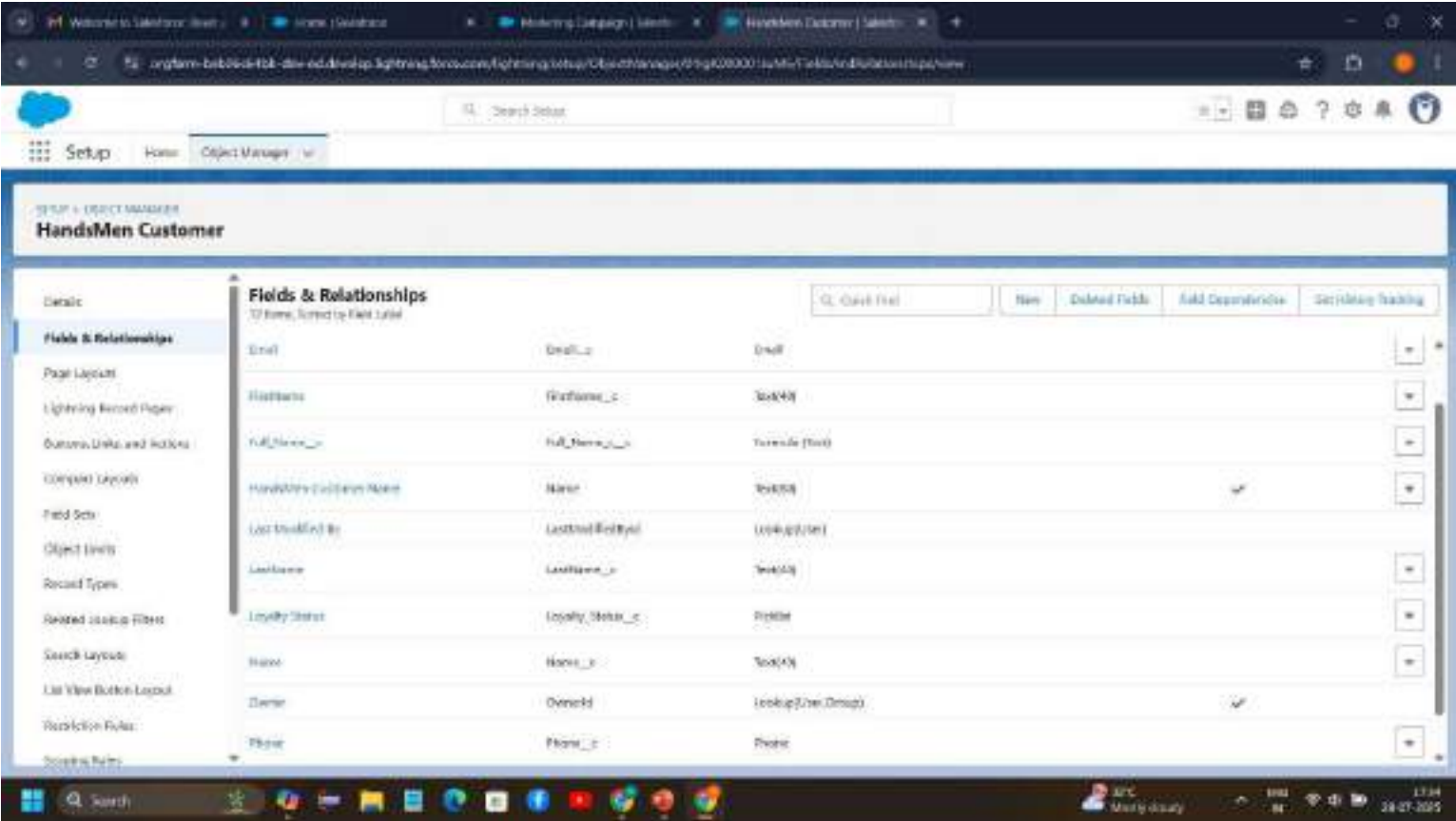
Name (Record Name),

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

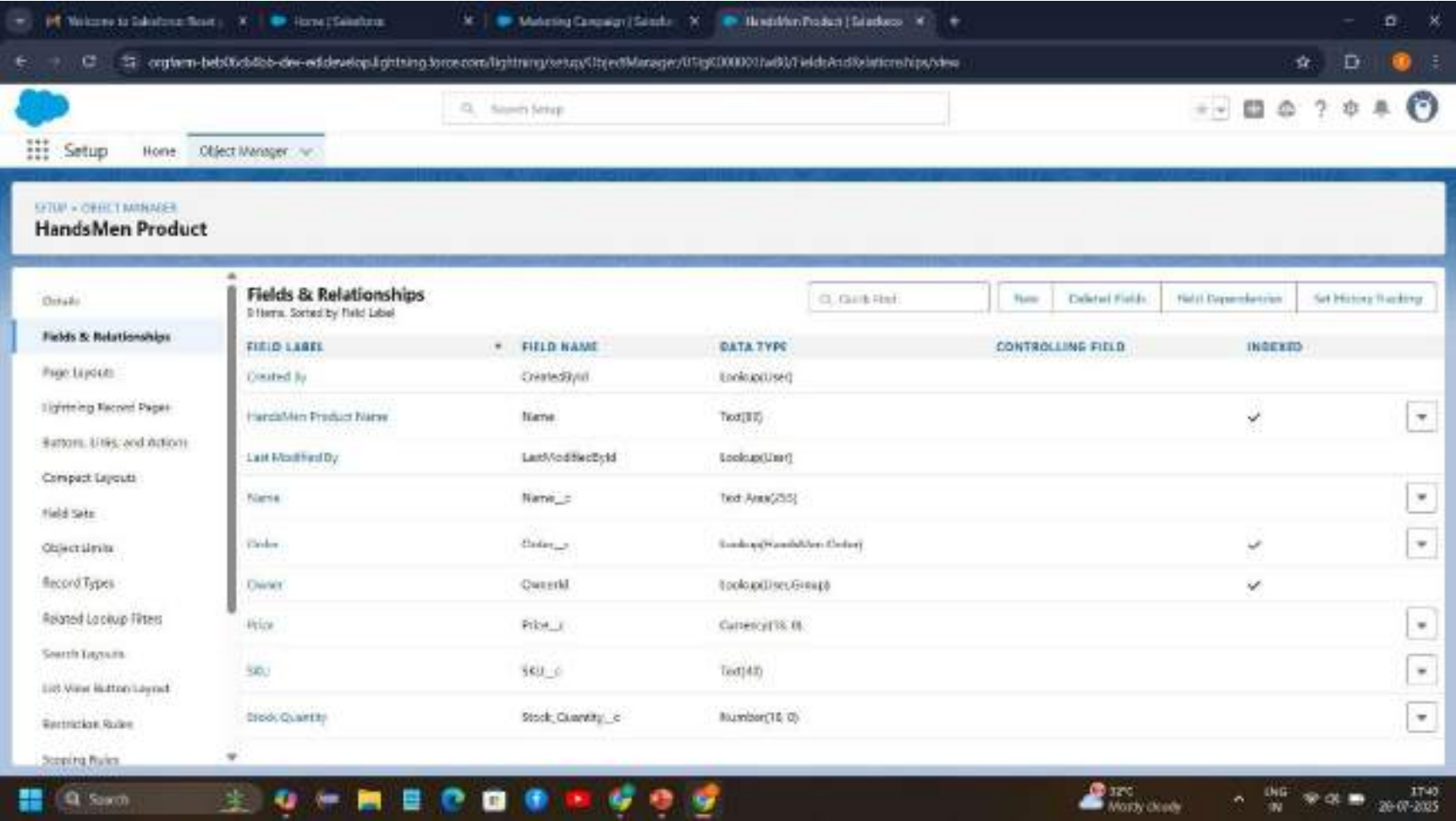
Description: Stores product catalog

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(255)		✓
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 navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Links, Record Types, Related Lookup Fields, Search Layouts, List View Button Layout, Validation Rules, and Sharing Rules. The main area is titled 'HandsMen Order' and shows a table of fields and relationships. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By (Lookup[User]), Customer (Lookup[HandsMen Customer]), HandsMen Order Name (Auto Number), Last Modified By (Lookup[User]), Owner (Lookup[User/Group]), Quantity (Number(18,0)), Status (Picklist), and Total Amount (Currency(18,0)). The 'HandsMen Order Name' field is highlighted in blue. At the top of the main area, there are buttons for 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

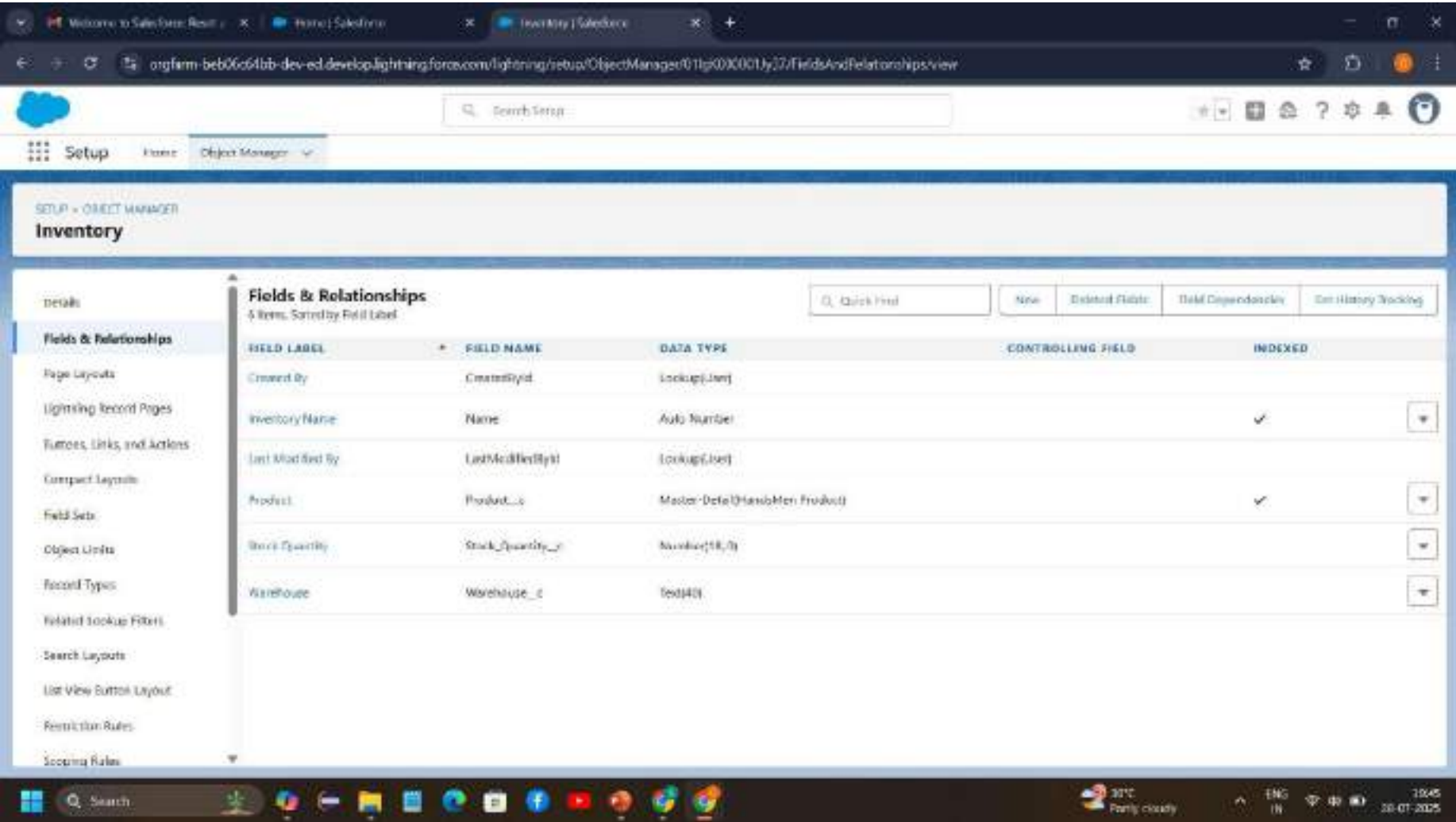
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup[User]		
Customer	CustomerId	Lookup[HandsMen Customer]		✓
HandsMen Order Name	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup[User]		
Owner	OwnerId	Lookup[User/Group]		✓
Quantity	Quantity__c	Number(18,0)		
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

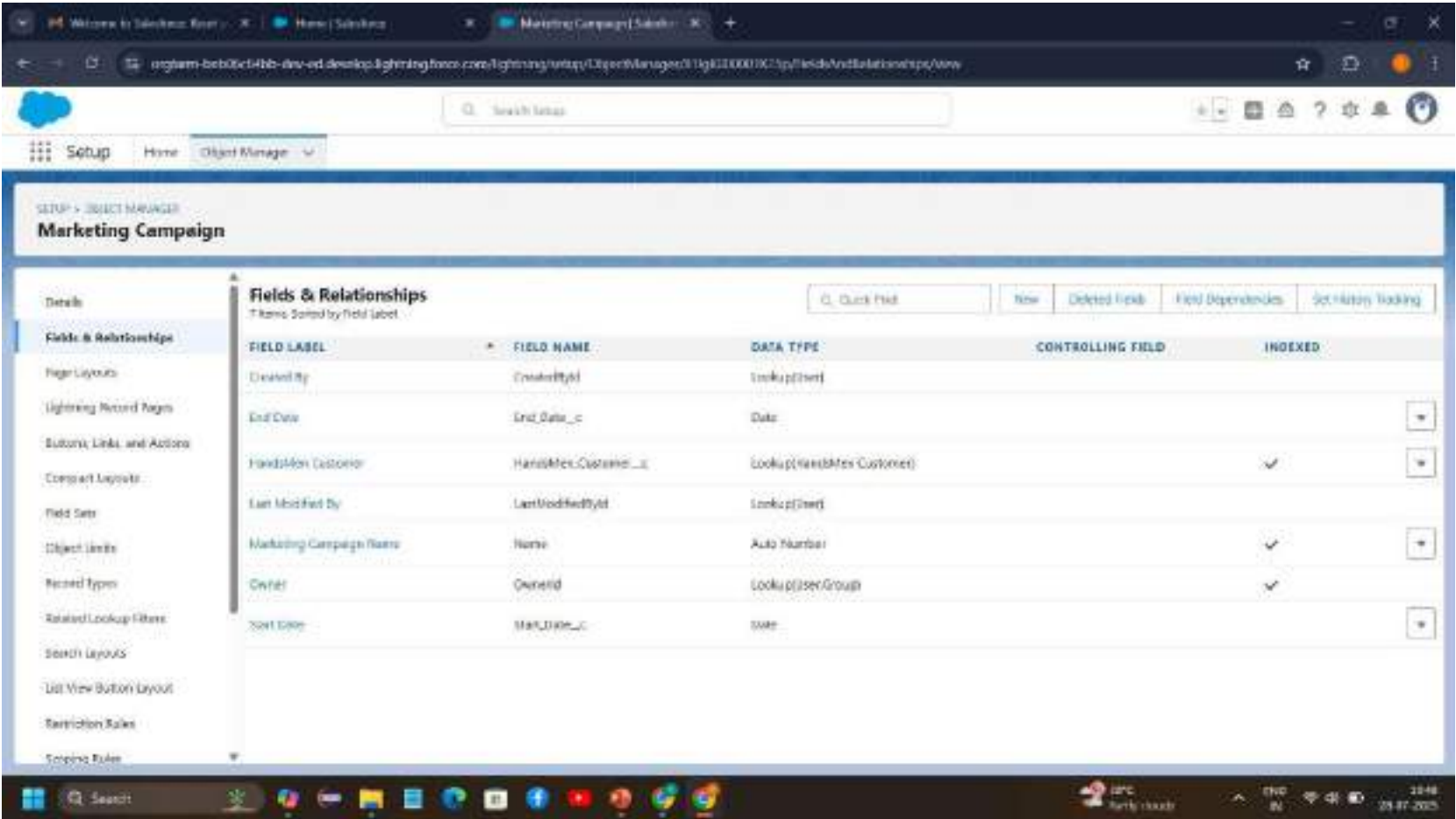
Type: Custom Object

Description: Manages promotions & campaigns

Key Fields:Campaign_Name (Record Name),

Start_Date (Date),

End_Date (Date)



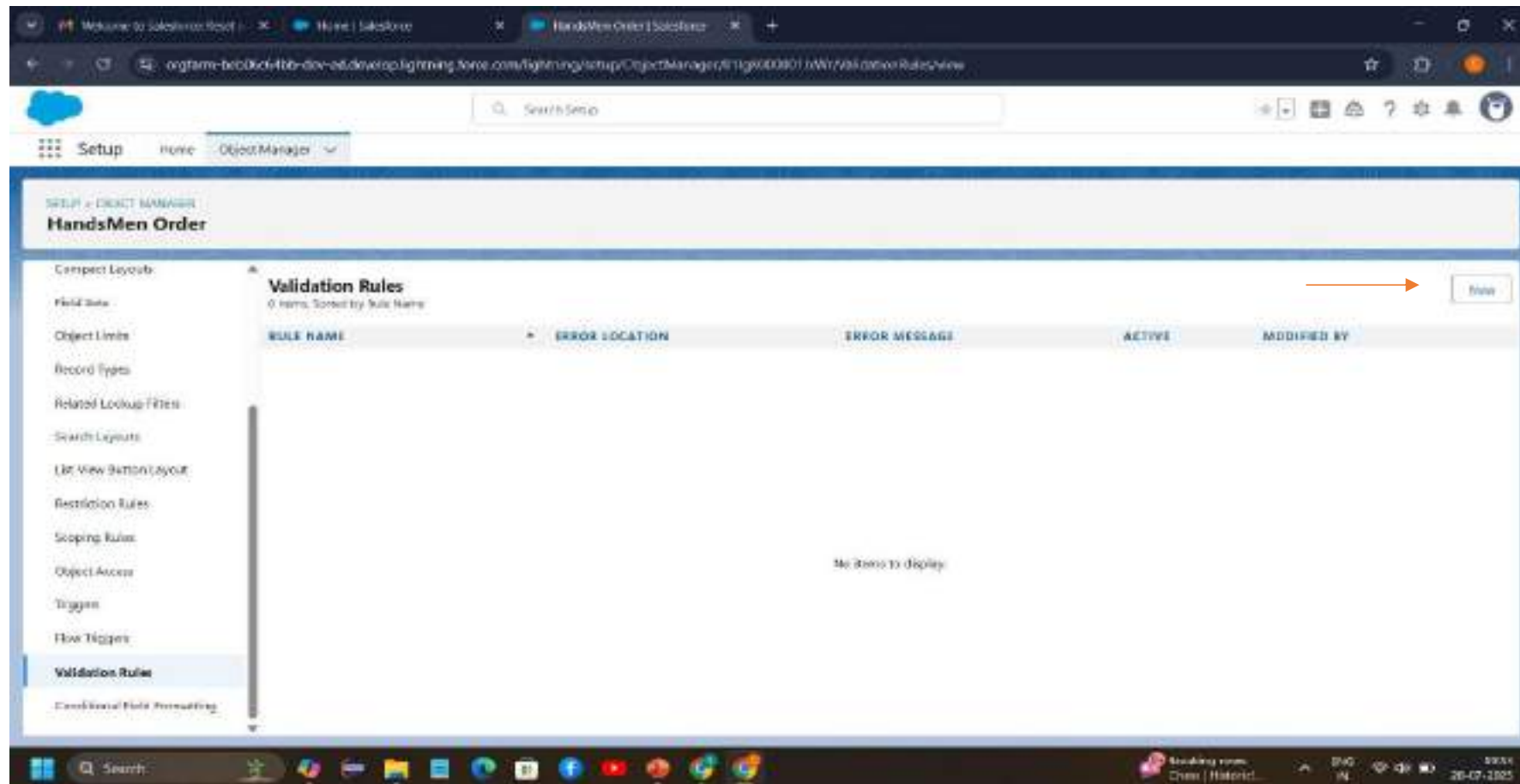
The screenshot shows the Salesforce Lightning Setup interface for the 'Marketing Campaign' custom object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Sharing Rules. The main content area is titled 'Marketing Campaign' and features a 'Fields & Relationships' section. This section includes a table with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The table lists several fields: Created By, End Date, Handshakes Customer, Last Modified By, Marketing Campaign Name, Owner, and Sort Date. Each row provides details about the field's name, data type, and whether it is indexed or a controlling field. At the top of the Fields & Relationships section, there are tabs for 'Quick Pick', 'New', 'Deleted Fields', 'Field Dependencies', and 'Get History Tracking'.

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

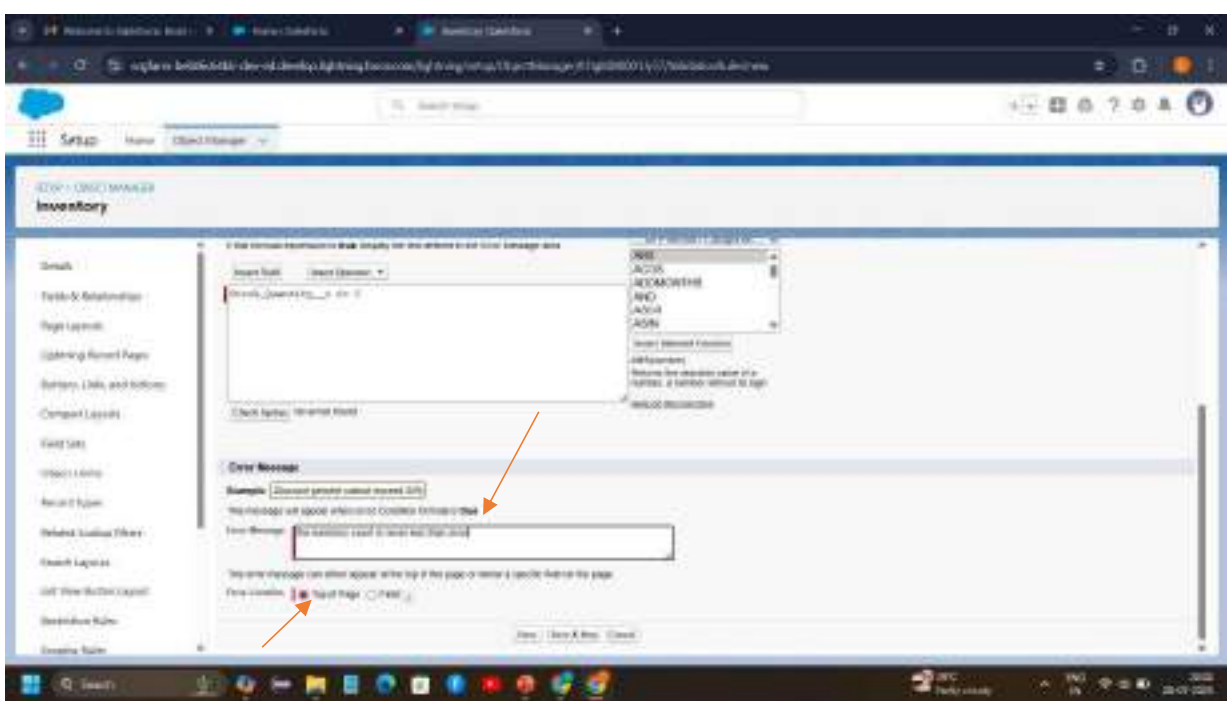
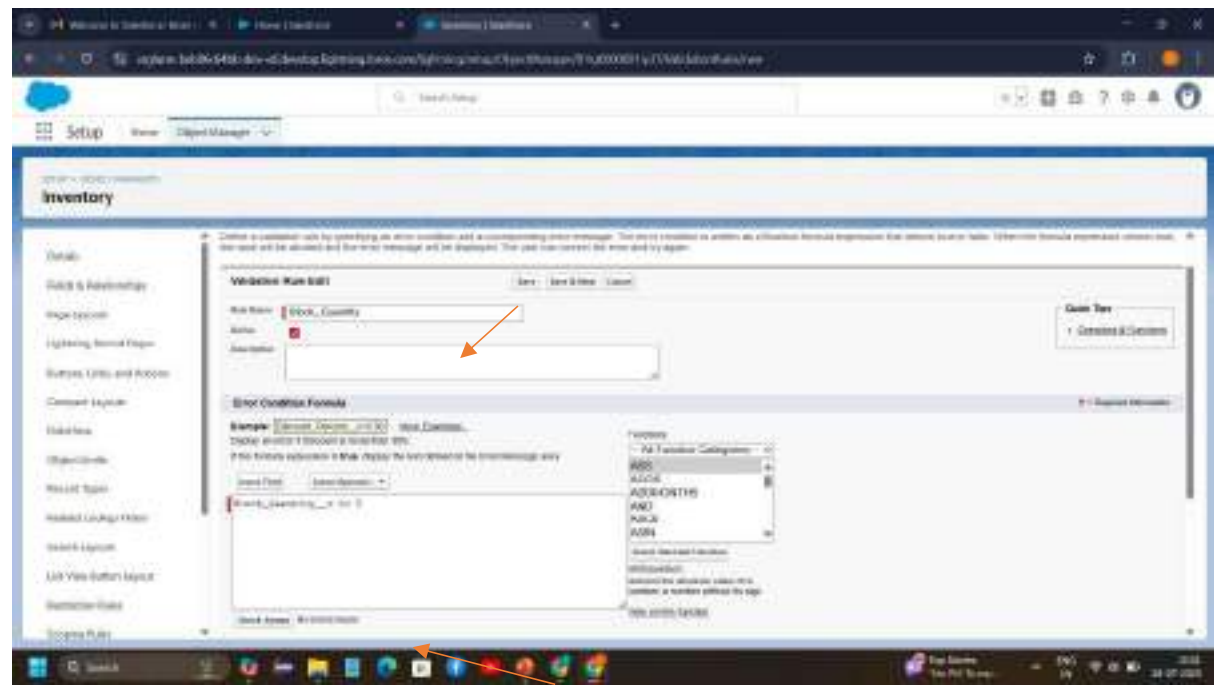
Data Configuration

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.



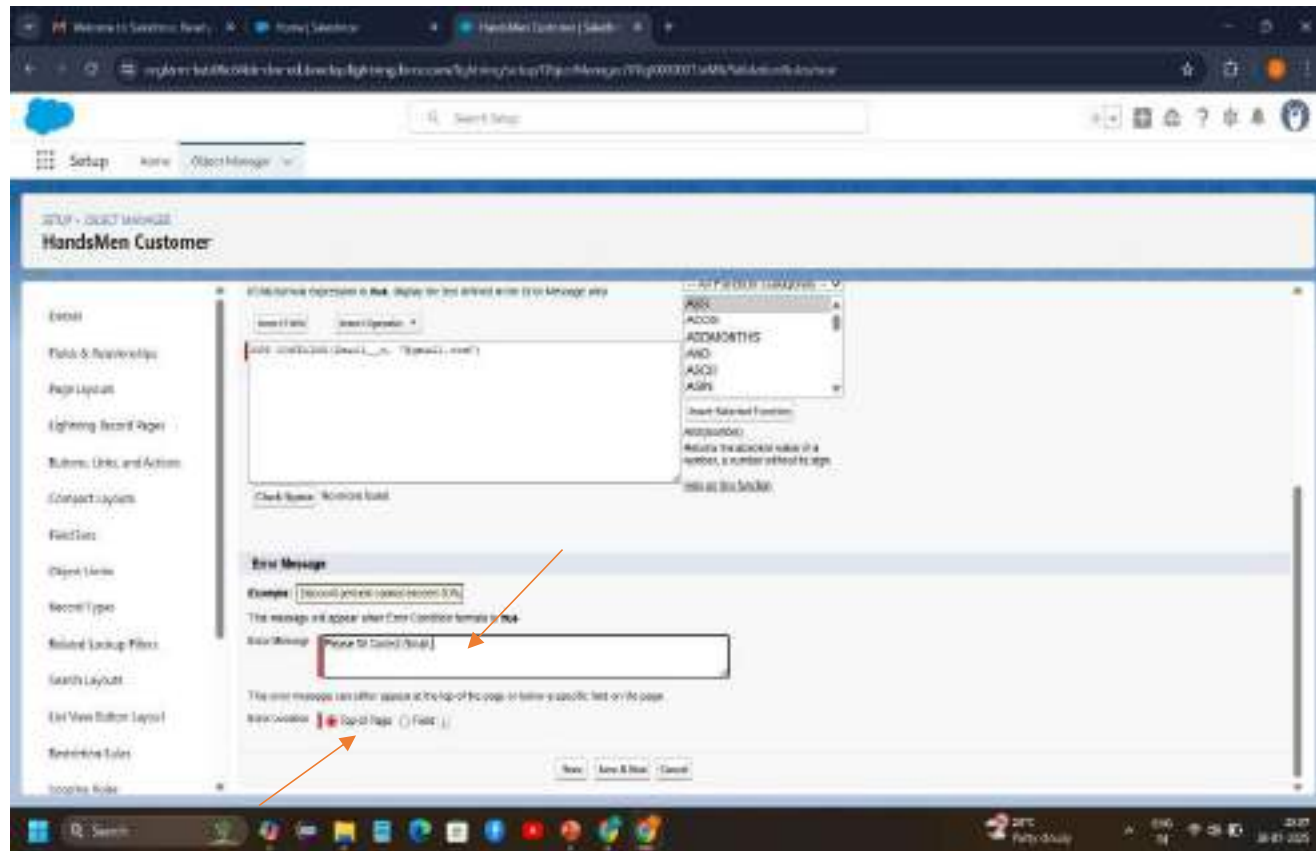
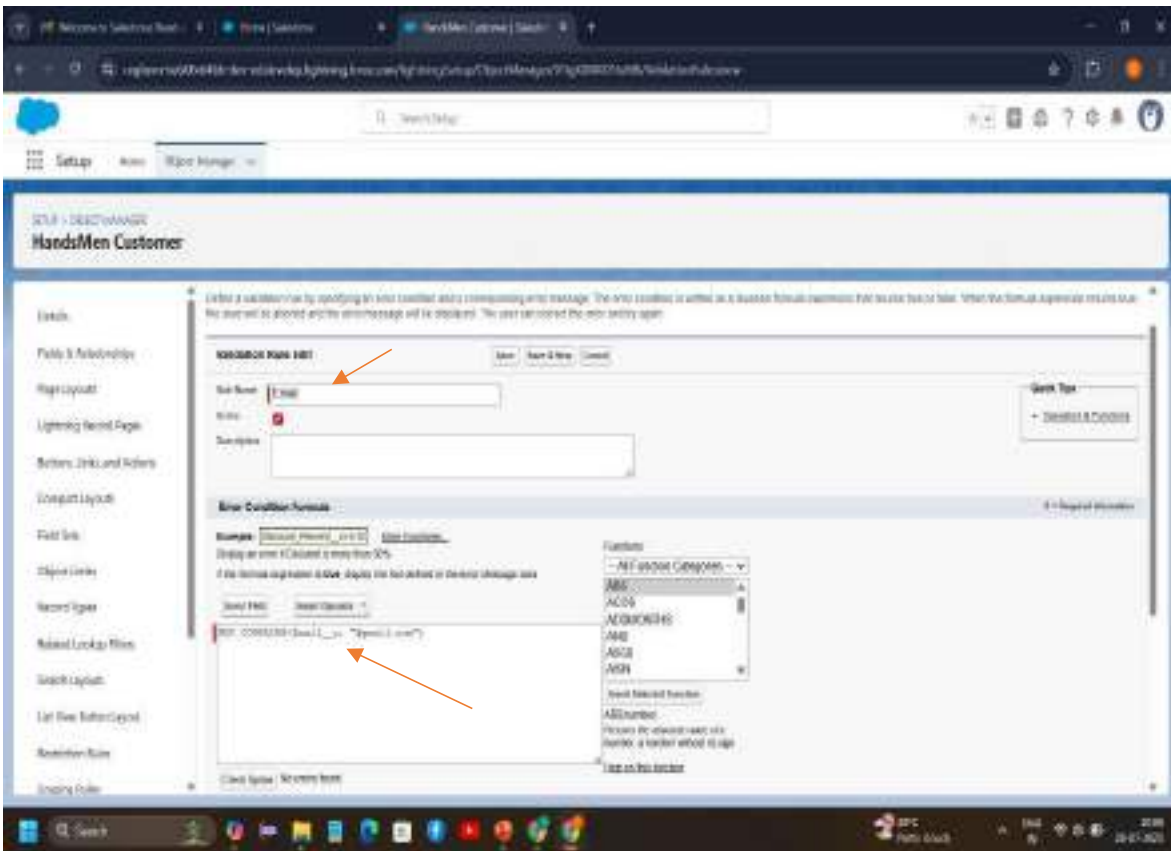
Create Validation rule for HandsMen Customer object.

Enter Rule name as "Email".

Insert the Error Condition Formula as :-

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

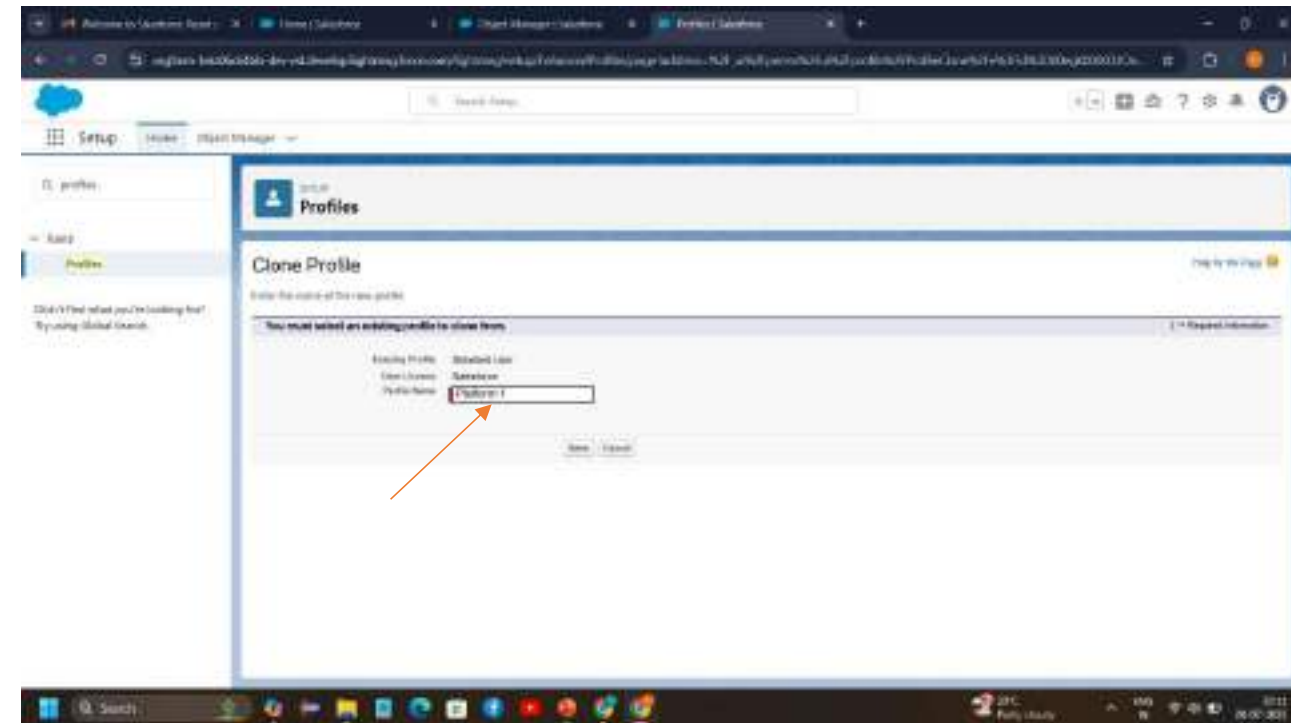
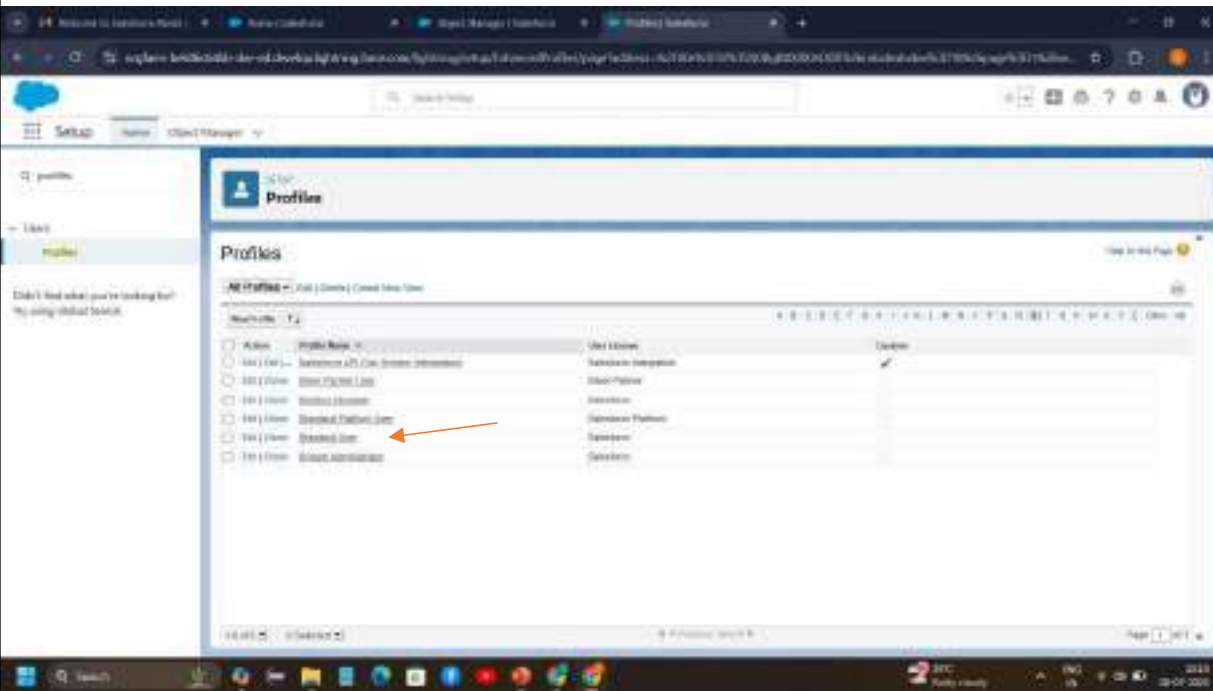
Enter the Error Message as "Please fill Correct Gmail", select the Error location as Top of Page and click Save.



Profile - Sales

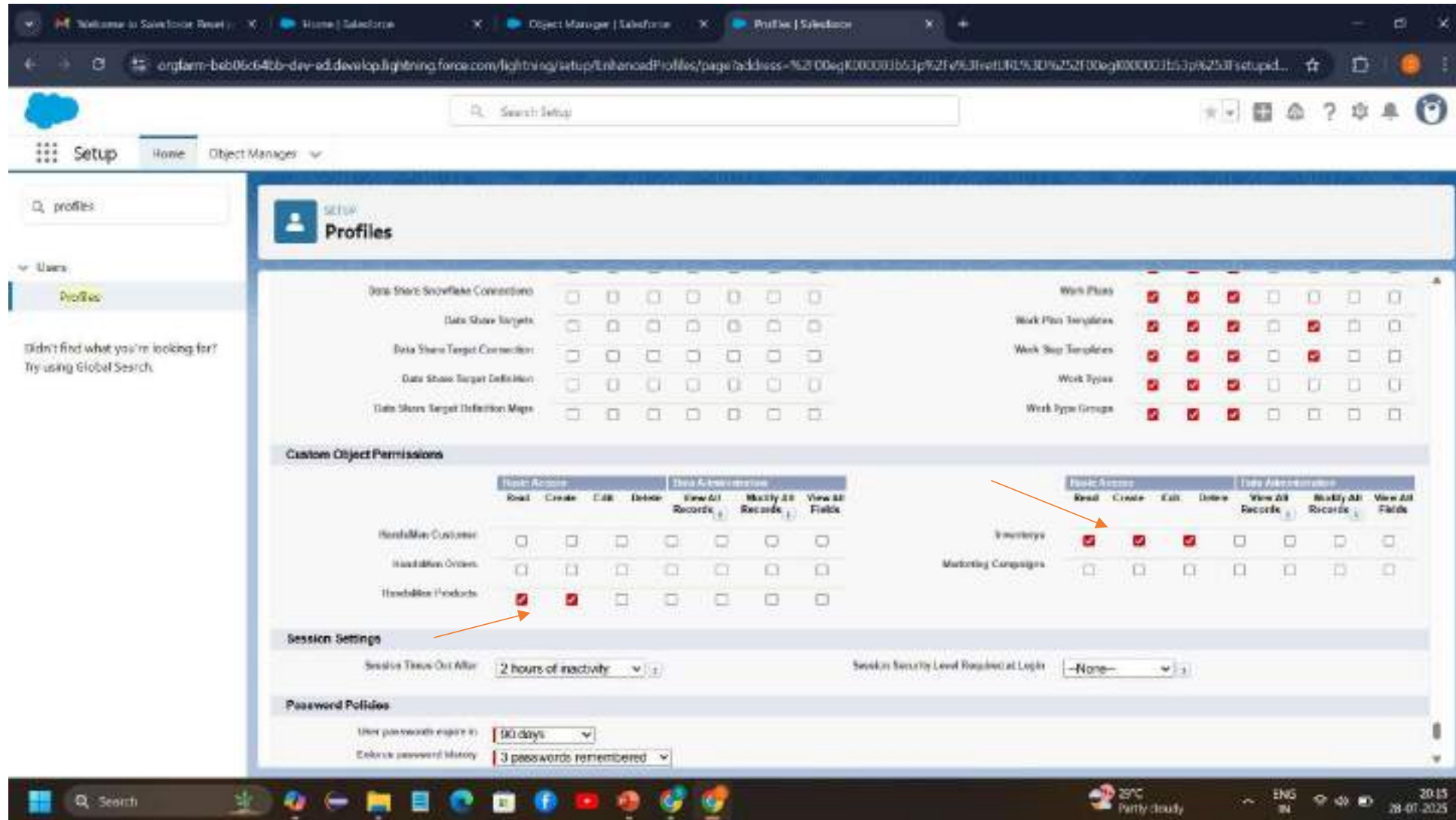
Creating Profile

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 'Simple Role Hierarchy' section with a dropdown menu set to 'Territory-based Sample'. Below this is a hierarchical diagram showing roles from 'Executive Staff' down to various Sales Reps. An orange arrow points to the 'Set Up Roles' button at the bottom right of the diagram. The button is labeled 'Set Up Roles' and has a checkbox below it that says '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.

Simple 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 all sales

Eastern Sales Director

Director of all sales

International Sales Director

Director of all 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.

Western Sales Rep

QA Sales Rep
US Sales Rep

Eastern Sales Rep

NY Sales Rep
WA Sales Rep

International Sales Rep

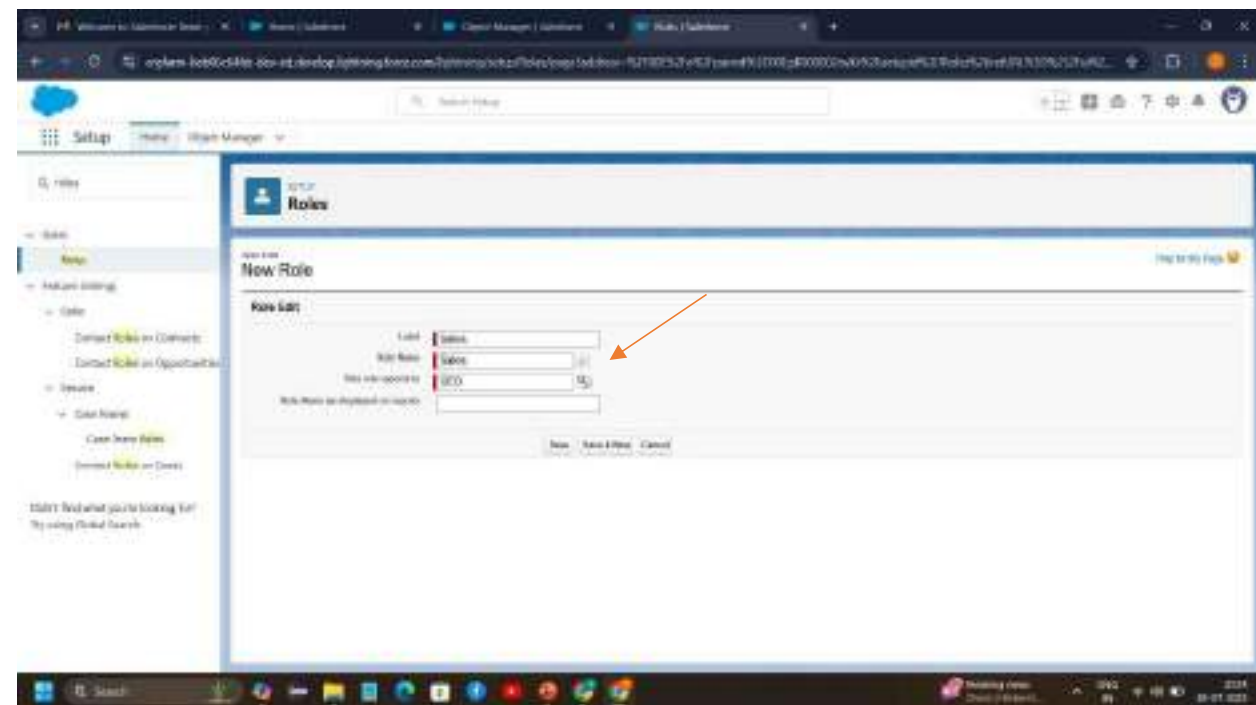
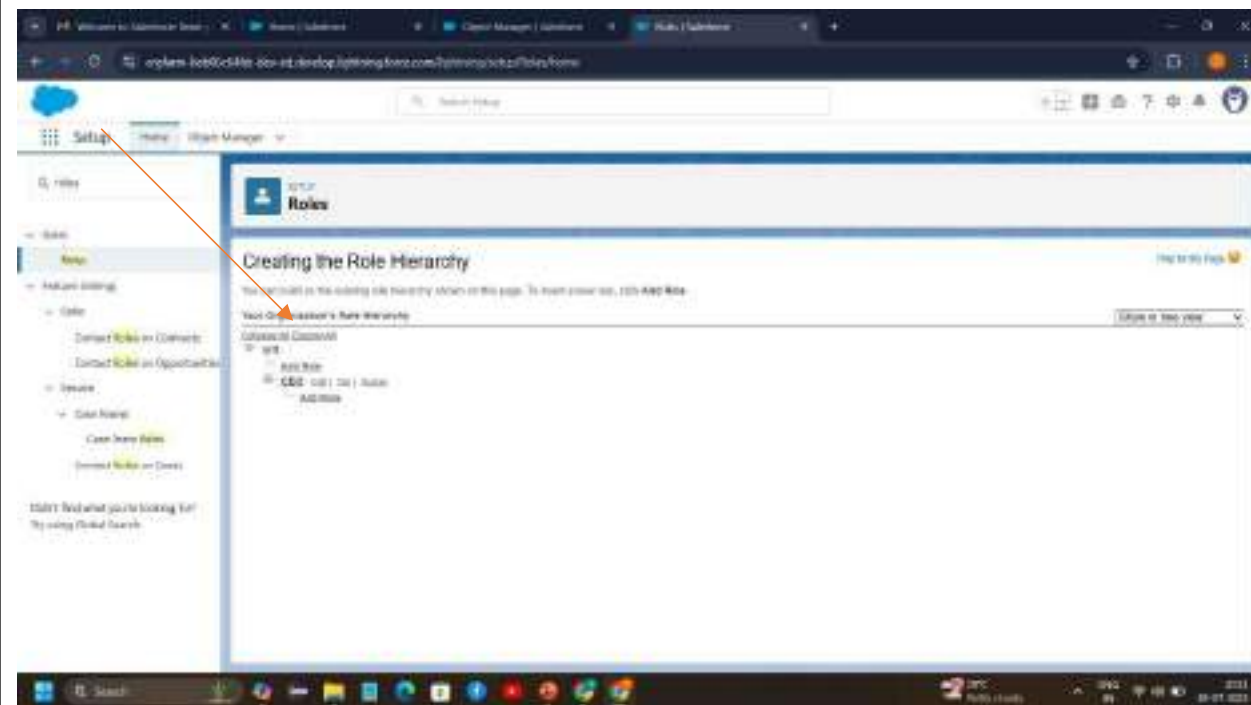
India Sales Rep
Europe Sales Rep

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

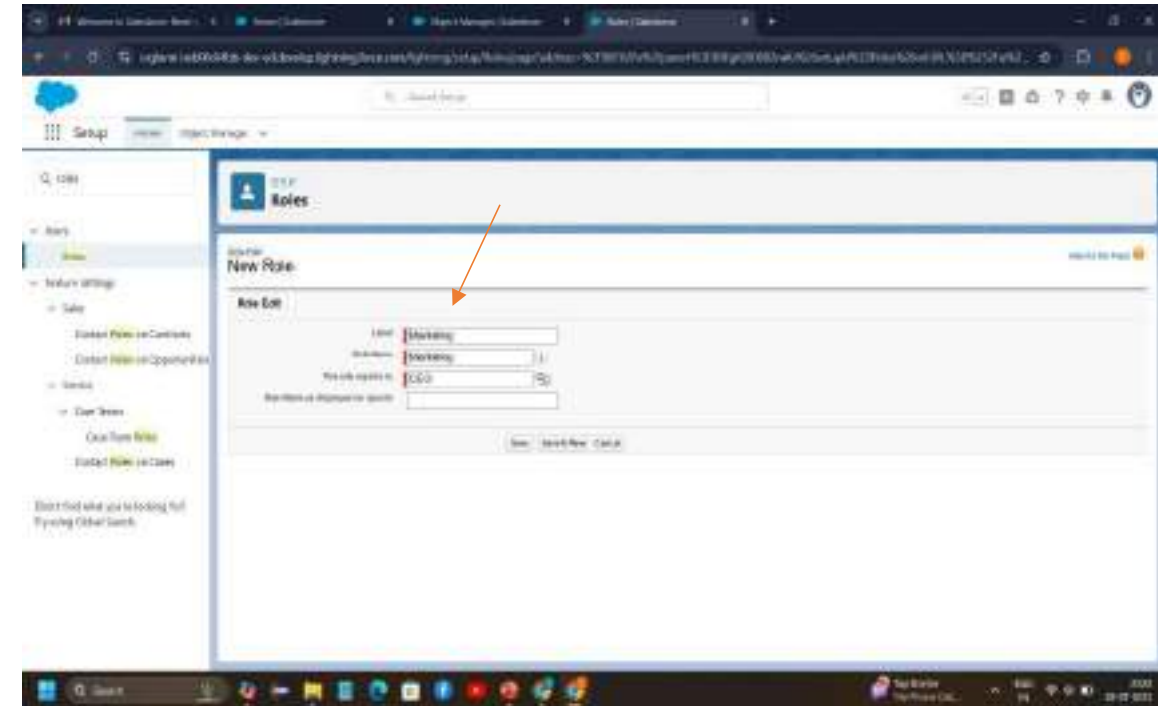
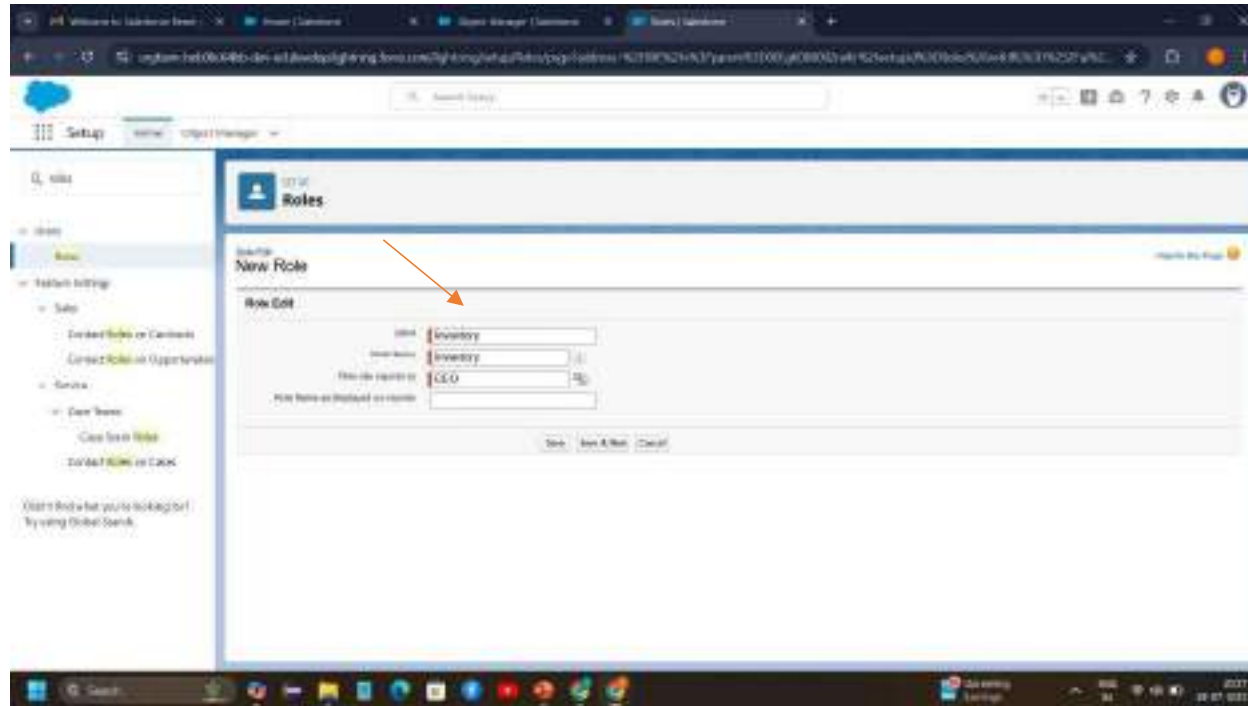
Set Up Roles

☐ 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

- Root
 - Add Role
 - CEO Edit | Del | Assign
 - Add Role
 - CEO Edit | Del | Assign
 - Add Role
 - COO Edit | Del | Assign
 - Add Role
 - Inventory Edit | Del | Assign
 - Add Role
 - Marketing Edit | Del | Assign
 - Add Role
 - Sales Edit | Del | Assign
 - Add Role
 - SVP, Customer Service & Support Edit | Del | Assign
 - Add Role
 - Customer Support, International Edit | Del | Assign
 - Add Role
 - Customer Support, North America Edit | Del | Assign
 - Add Role
 - Installation & Repair Services Edit | Del | Assign
 - Add Role
 - SVP, Human Resources Edit | Del | Assign
 - Add Role
 - SVP, Sales & Marketing Edit | Del | Assign

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

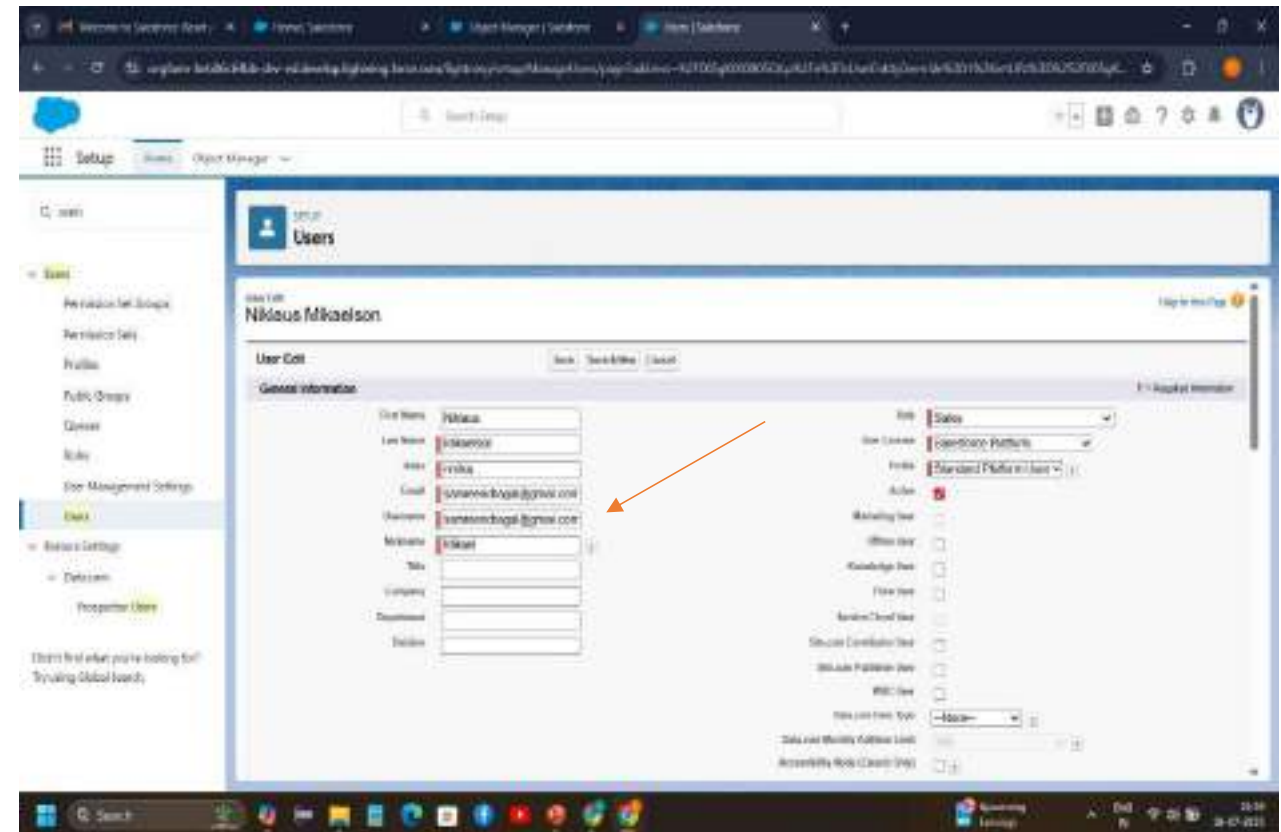
Username : Username should be in this form: text@text.text

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 displays the 'New User' setup page in Salesforce. The 'General Information' section contains the following fields:

- First Name: Kol
- Last Name: Mikaelson
- Email: kolmikaelson@gmail.com
- Username: kolmikaelson@gmail.com
- Role: Inventory

A red arrow points to the Username field. The right side of the page shows a list of roles, including Inventory, Salesforce Platform, and Standard Platform User.

Permission set - Permission_Platform_1

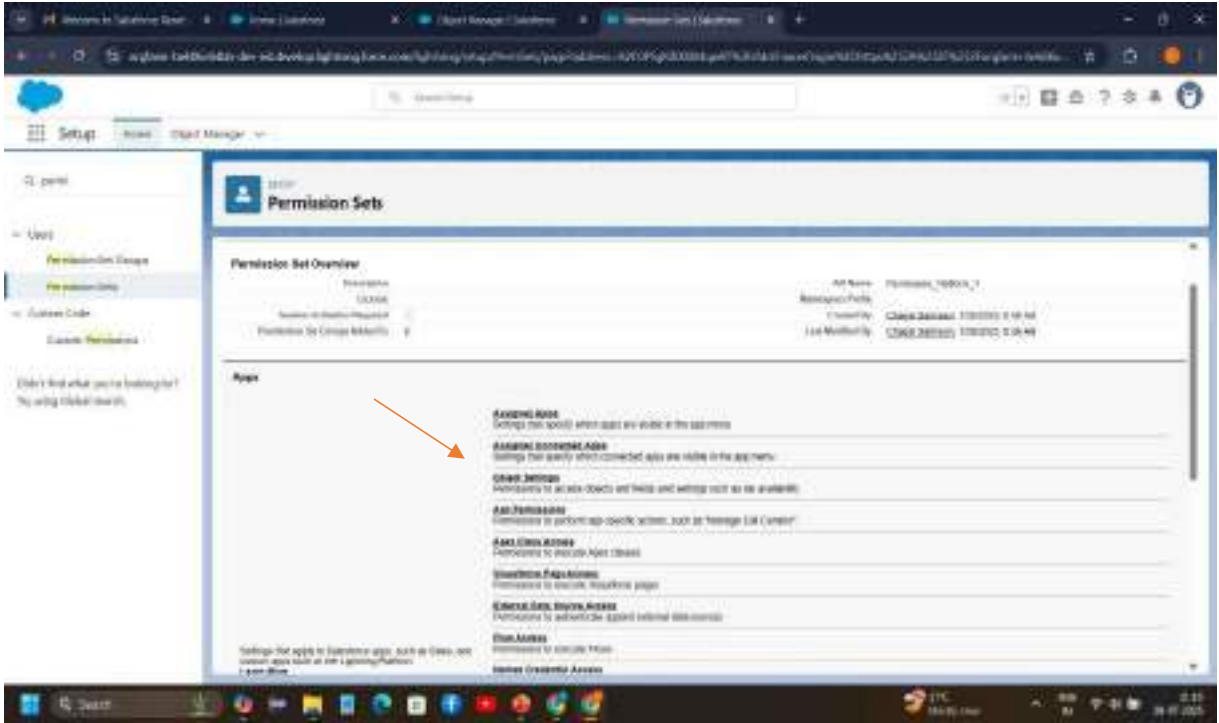
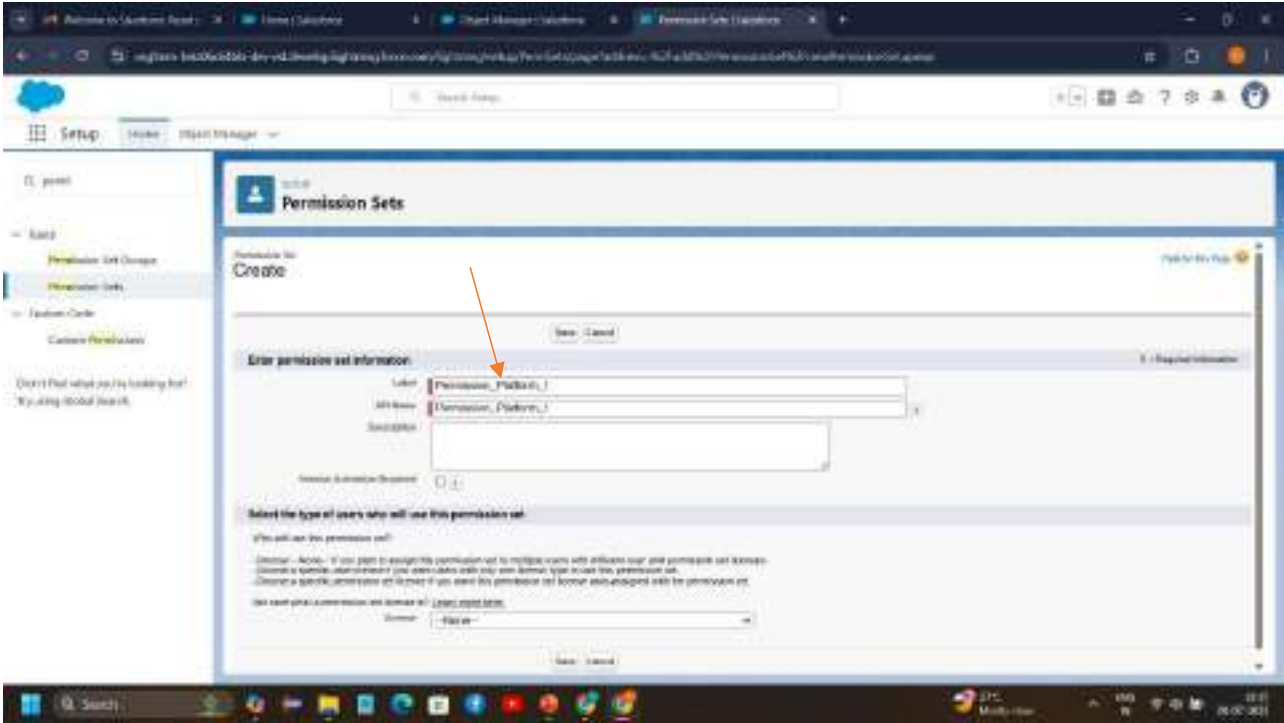
Go to setup → type “permission sets” in quick search → select permission sets → New

The screenshot shows the Salesforce Setup interface 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.

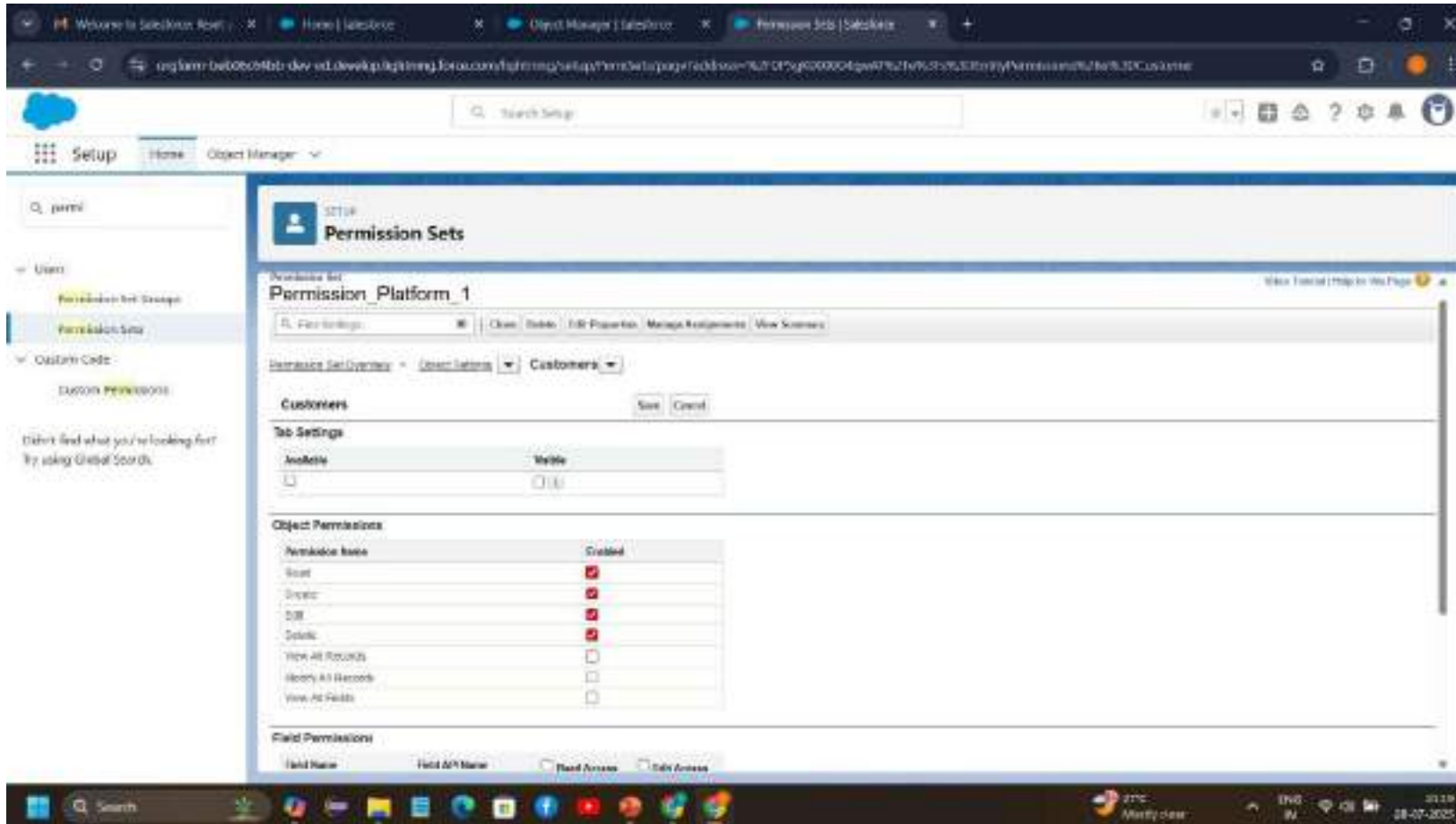
| Name | Description | License |
|-------------------------------|---|-------------------------------|
| Customer Data Platform | This Data Cloud permission set will be deprecated in Spring '24. Learn... | Customer Data Platform |
| Data Cloud | This Data Cloud permission set will be deprecated in Spring '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 for 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 listed are Read, Create, Edit, Delete, View All Records, Modify All Records, and View All Fields. The 'Read', 'Create', 'Edit', and 'Delete' permissions are checked, while 'View All Records', 'Modify All Records', and 'View All Fields' are unchecked. The 'Field Permissions' section is also visible but empty.

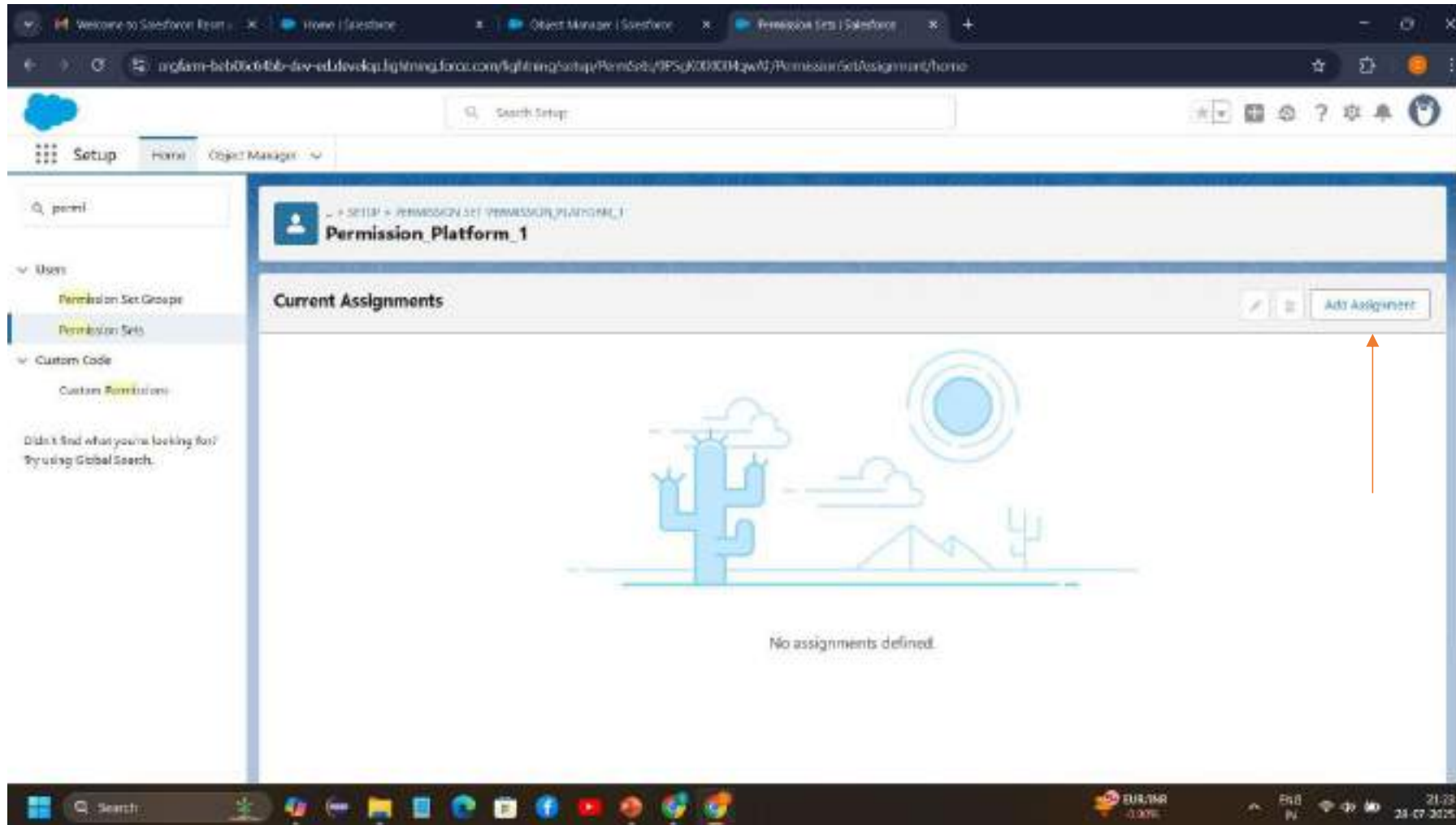
Permission Set: **Permission_Platform_1**

Permission Set Overview | Object Settings | 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 like 'Setup', 'Home', and 'Object Manager'. The main content area displays a table of users with columns for 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. 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.00djk000007f1fua1u1w2fwt7y@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> | Integration User | Integ | integration@00djk000007f1fua1u1w2fwt7y@chatter.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 | epic49cc070d59d3@orgentforce.com | | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | Security User | sec | insightsecurity@00djk000007f1fua1u1w2fwt7y@chatter.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 |

Email Template

Create an Order Confirmation Email Template

Steps to Create a Classic Email Template

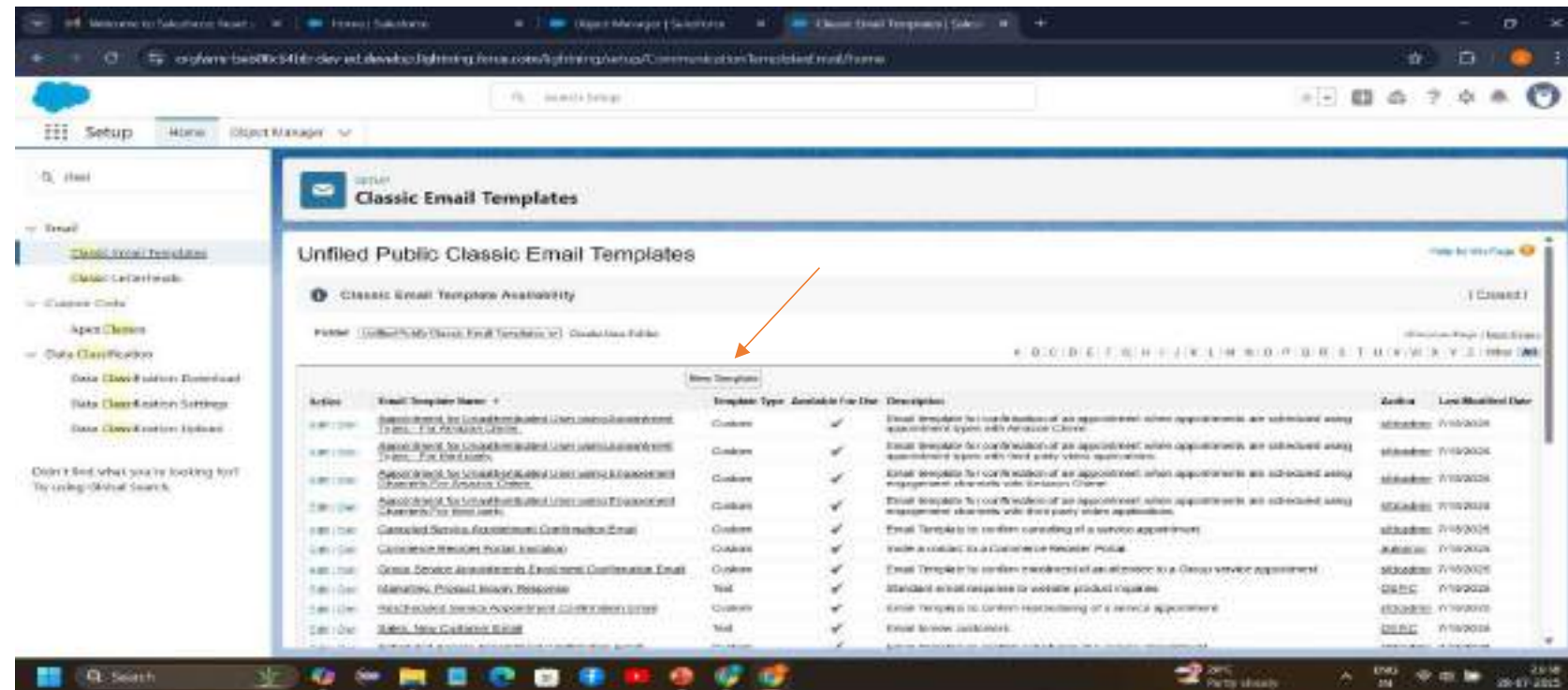
Go to Salesforce Setup

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

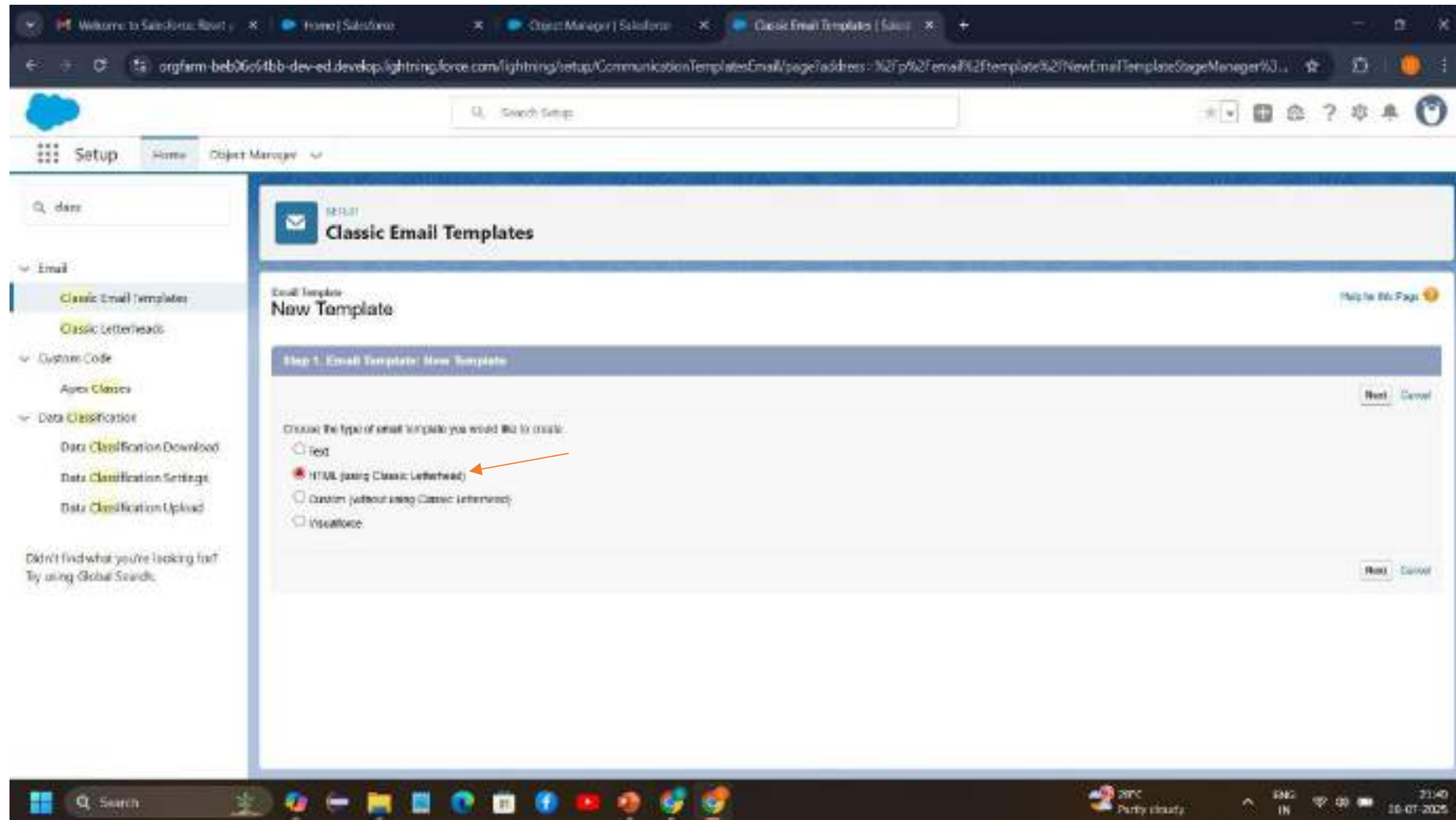
Navigate to Classic Email Templates

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

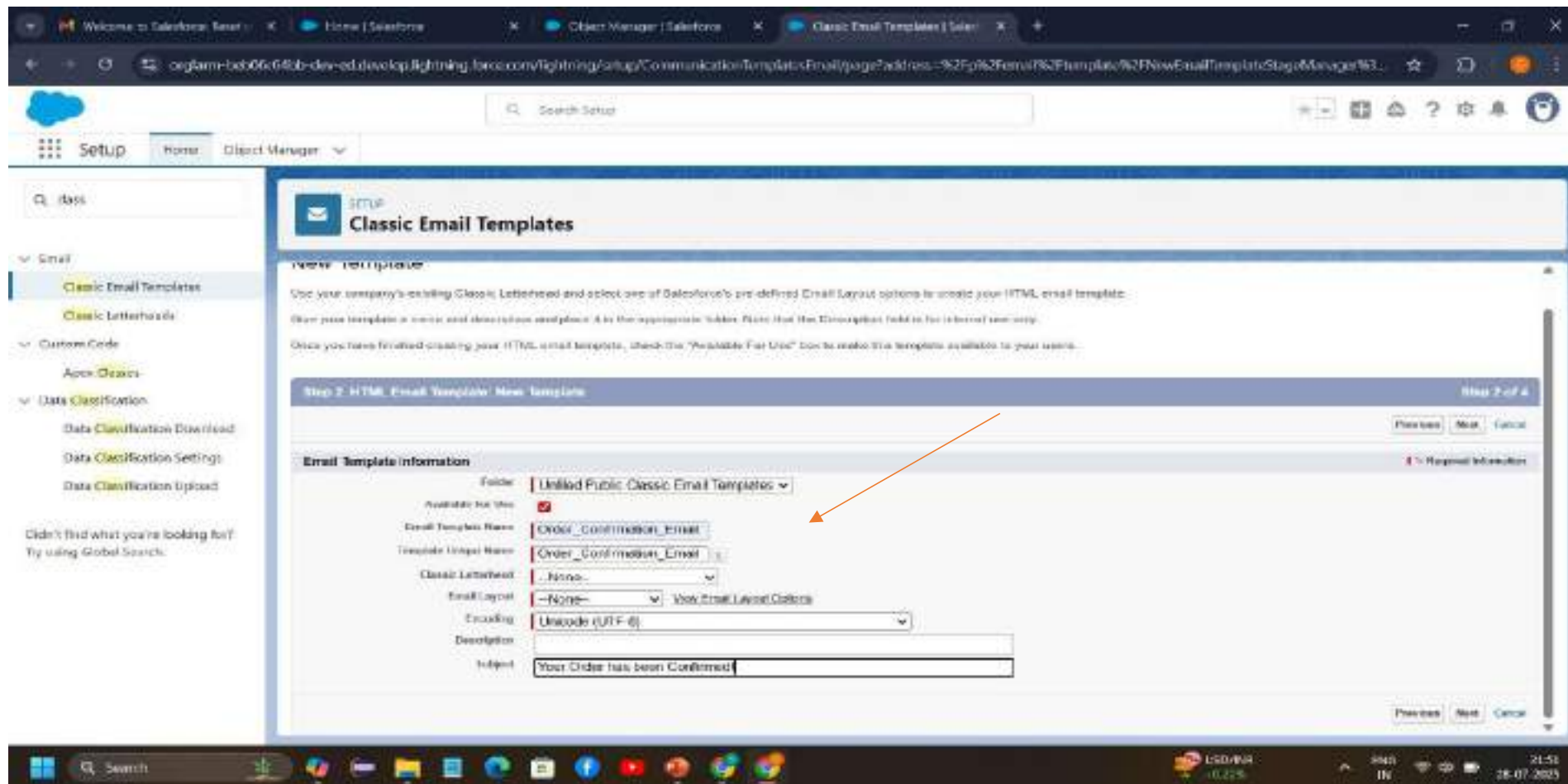
Folder: Select "Unfiled Public Email Templates" (or create a new folder).

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:

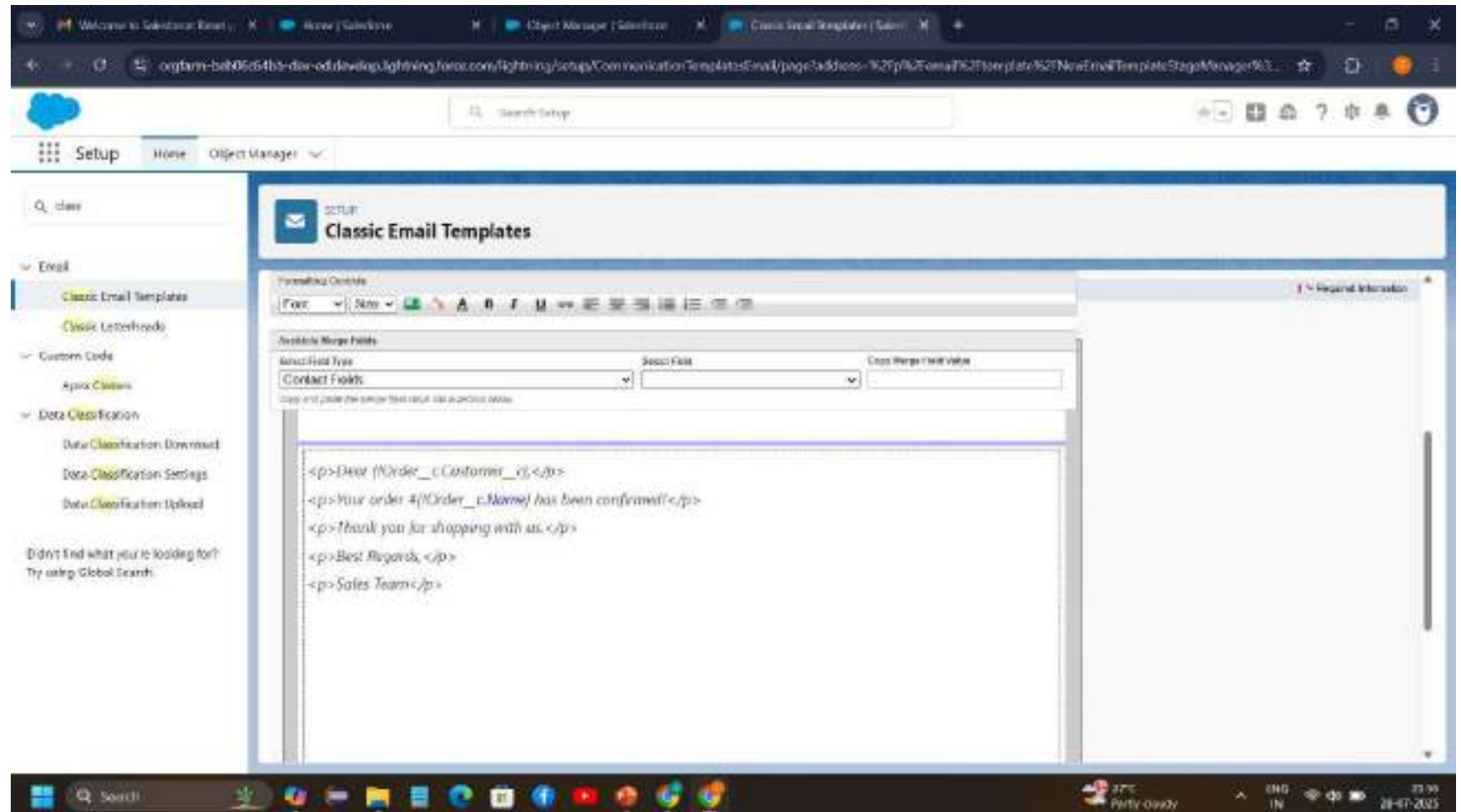
<p>Dear {!Order__c.Customer__c},</p>

<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={%2F%2Femail%2Ftemplate%2FNewEmailTemplateStageManager%2F...}`. The Salesforce Setup navigation bar is visible, with the left sidebar showing the 'Email' section 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 code:

```
<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.

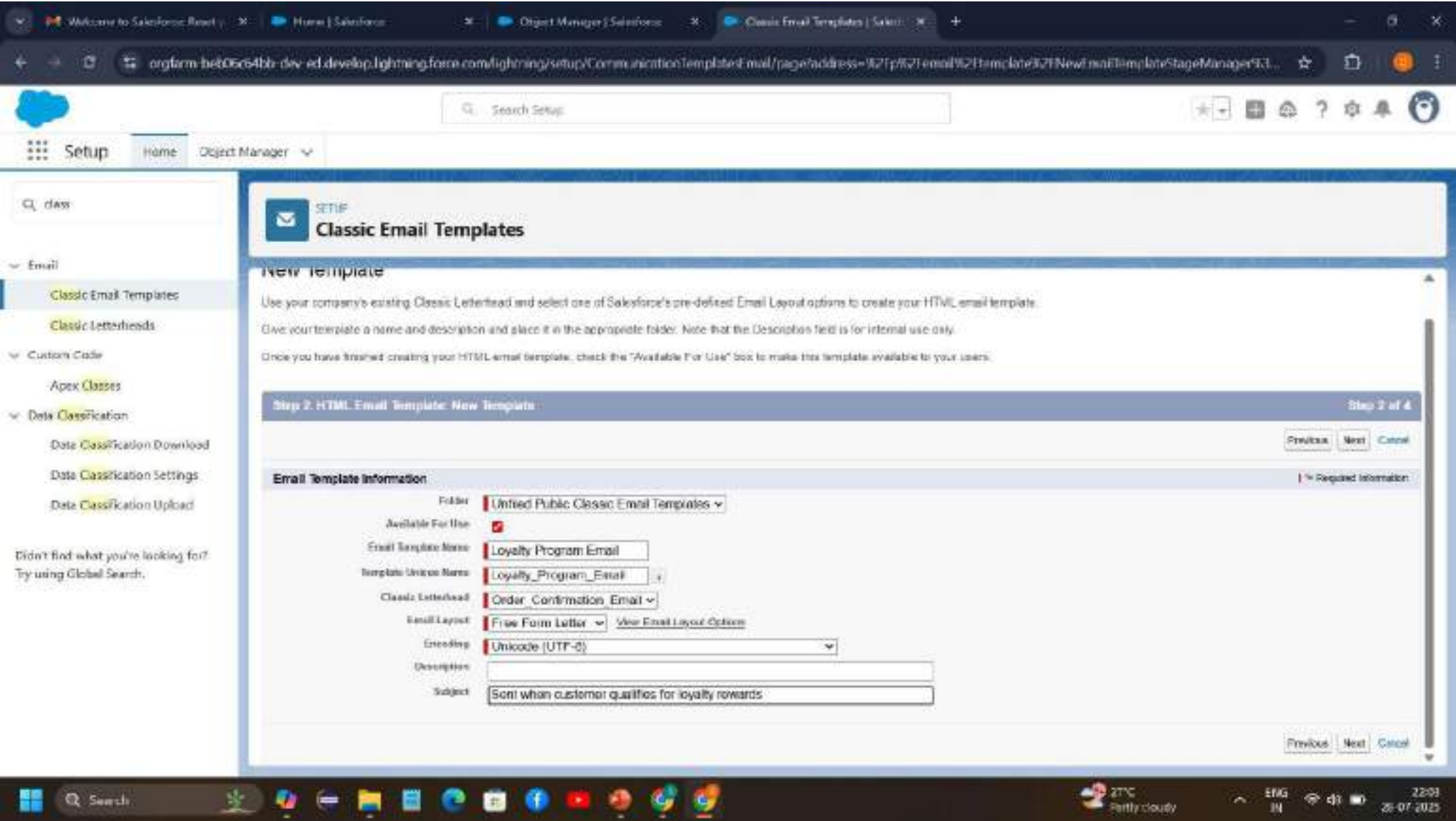
Create Remaining Email Template with the name "Low Stock Alert"

The screenshot shows the Salesforce Classic Email Templates setup page. The browser address bar displays the URL: `orgname-bet0604bb-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=__%2Fpr%2Femail%2Ftemplate%2FNewEmailTemplateStageManager%3...`. 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 includes a sub-header "Step 2. Test Email Template: New Template" (Step 2 of 2). Below this, 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: (empty field)
- Subject: (empty field)
- Email Body: **Sent when `Inventory < Stock_Quantity` < 5**

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

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



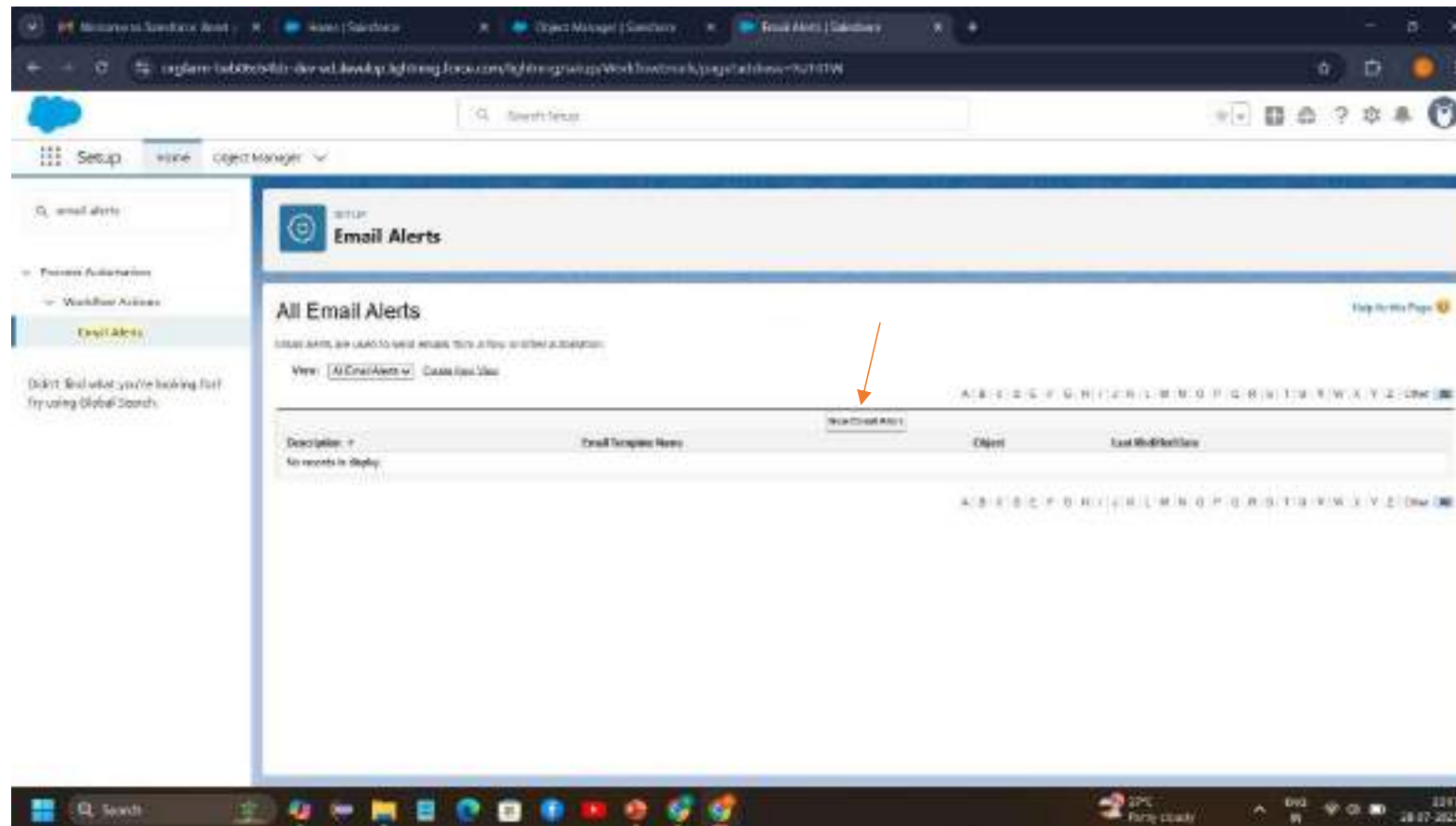
Create an Email Alert

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.

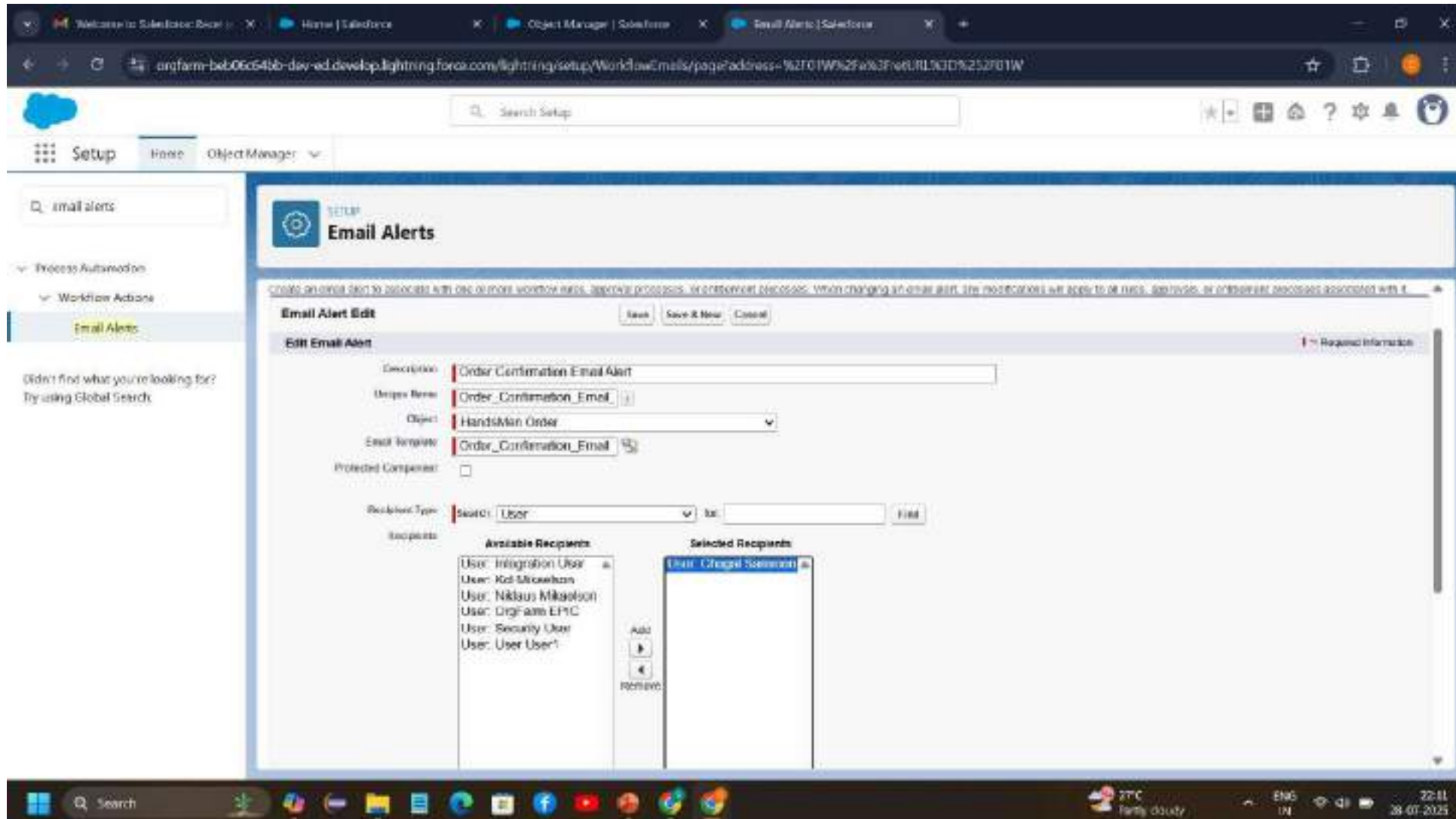


Description: Order Confirmation Email Alert

Object: Order__c

Email Template: Select the one created earlier.

Save the email alert.



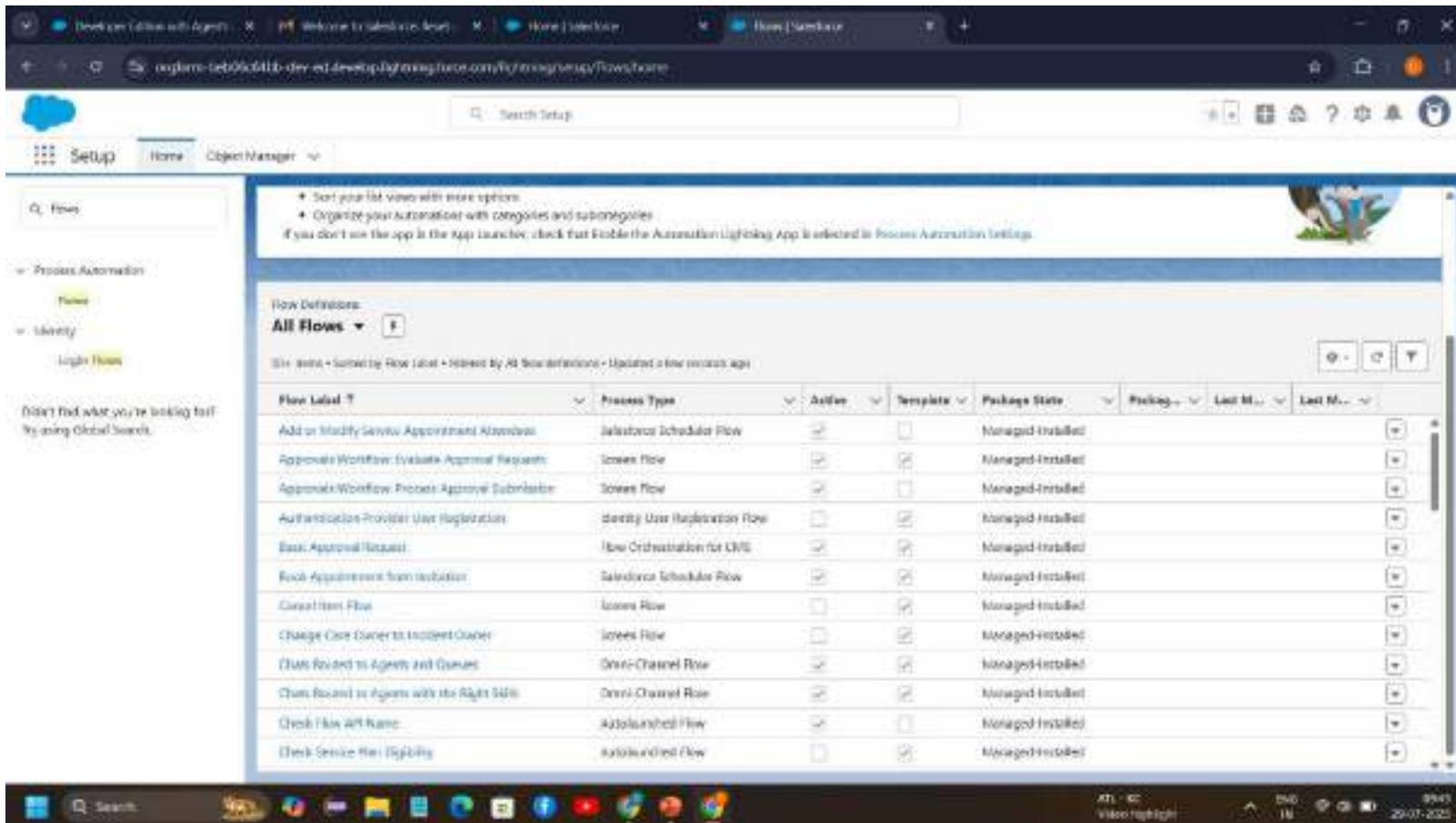
Flows

Create Order Confirmation Email

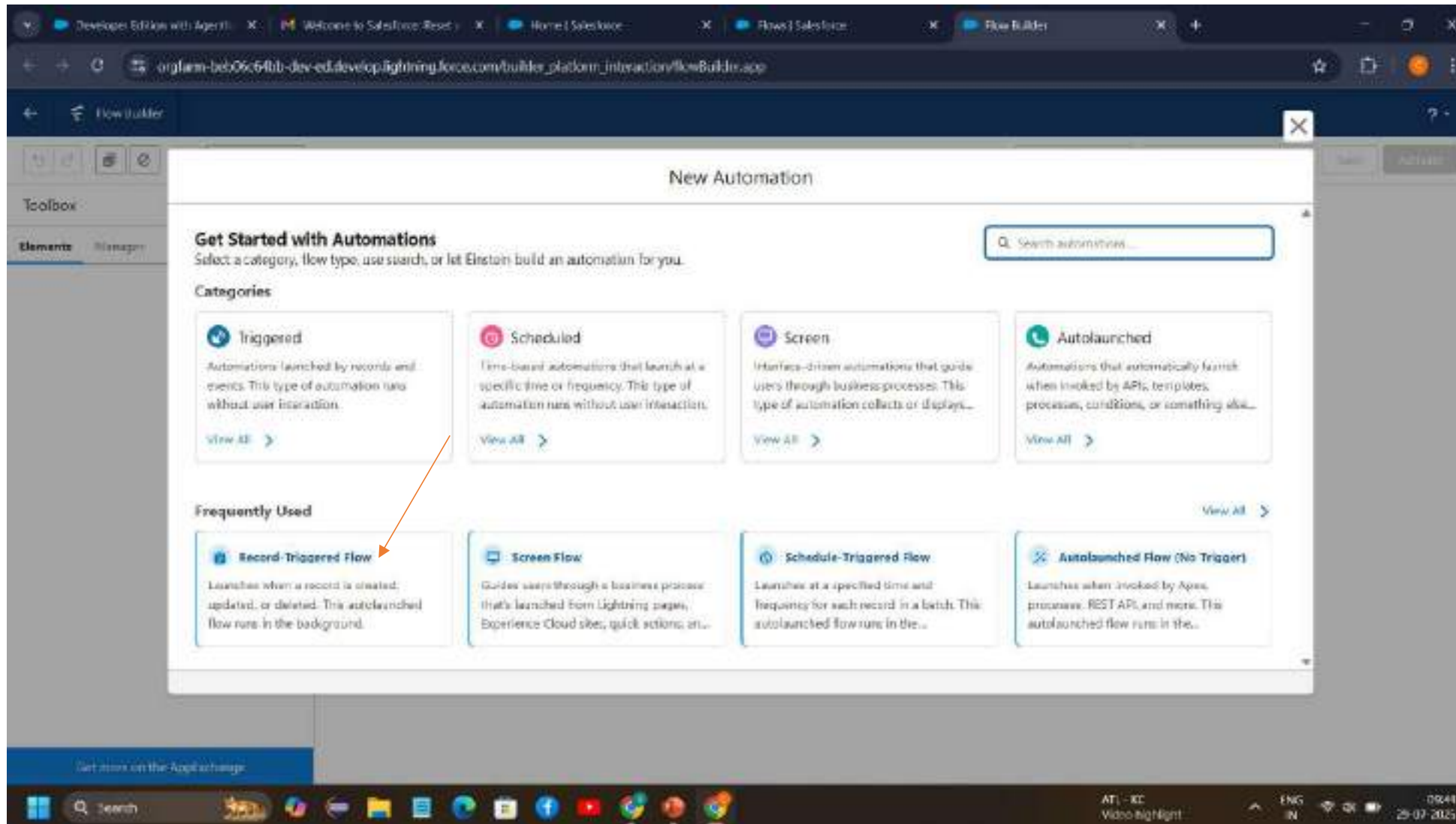
Order Confirmation Email (Record-Triggered)

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 flow diagram starting with a 'Record-Triggered Flow' event, followed by a 'Run Immediately' step, and ending with an 'End' step. On the right, the 'Configure Start' panel is open. It shows the 'Object' as 'HandMtn Order' and the 'Trigger the Flow When' section with 'A record is updated' selected. The 'Set Entry Conditions' section is also visible, showing a condition where 'Status__c' is 'Equal' to 'Confirmed'. Two orange arrows point to the 'HandMtn Order' field and the 'Status__c' field in the condition.

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

url: b1b9654b-dev-ed.develop.lightning.force.com/builder_platform/innovation/flowBuilder.app

Flow Builder

Run | Editing | Flow Tools | Save | Publish

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. Minimizing unnecessary flow executions 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: Equal Value: Confirmed

+ Add Condition

Add an "Action" Element

Click the "+" icon → Select Action.

Action Type: Send Email Alert

Email Alert: Select Order Confirmation Email Alert

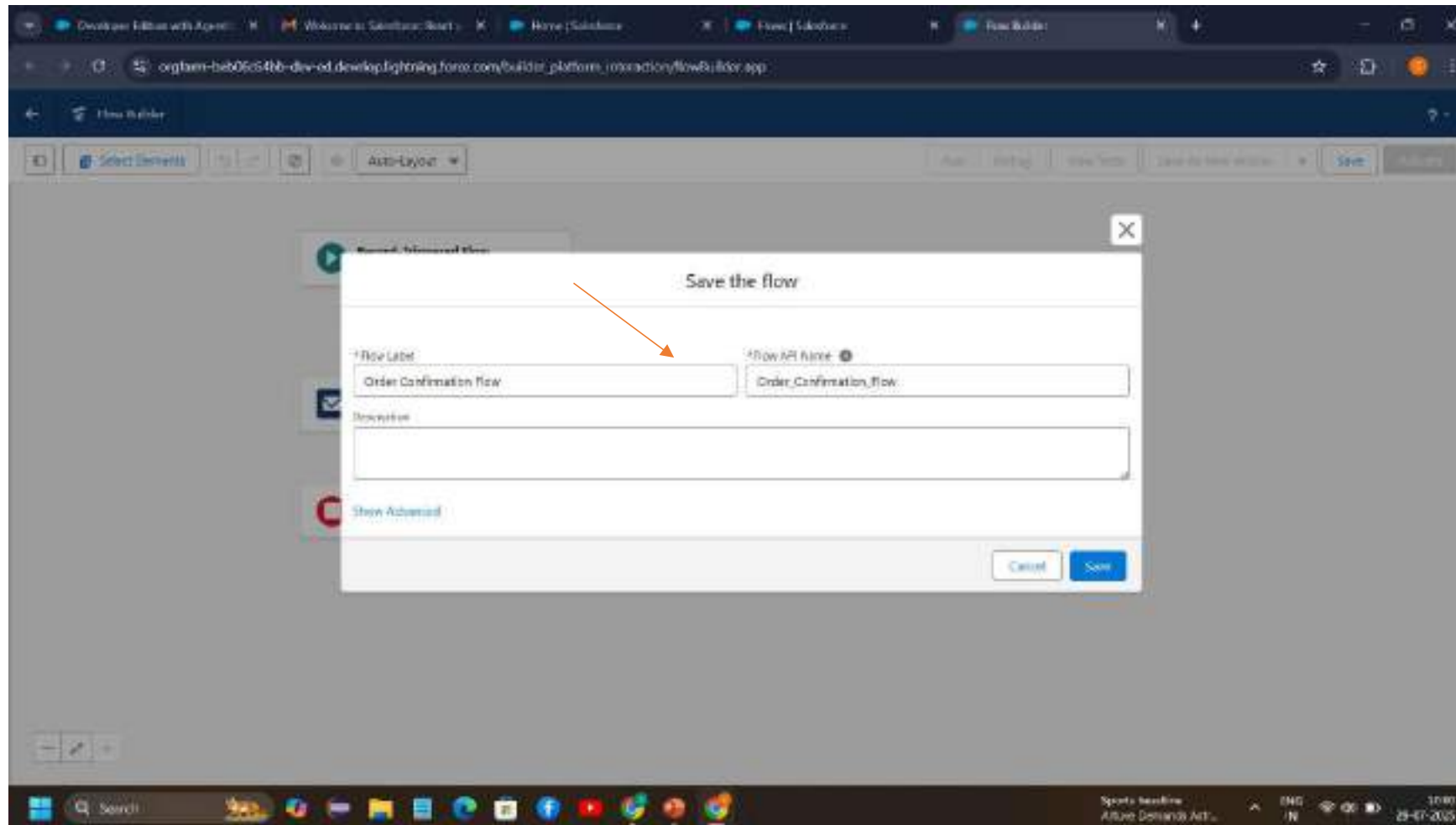
Label : Send Order Confirmation Email

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' trigger, 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 open. It shows the 'Label' as 'Send Order Confirmation Email', the 'Path Name' as 'Send Order Confirmation Email', and a 'Description' field. Below these fields, there is a section for 'Set Input Values' where a formula is entered: 'A_1: Triggering Event (Order__c) < Record ID: 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

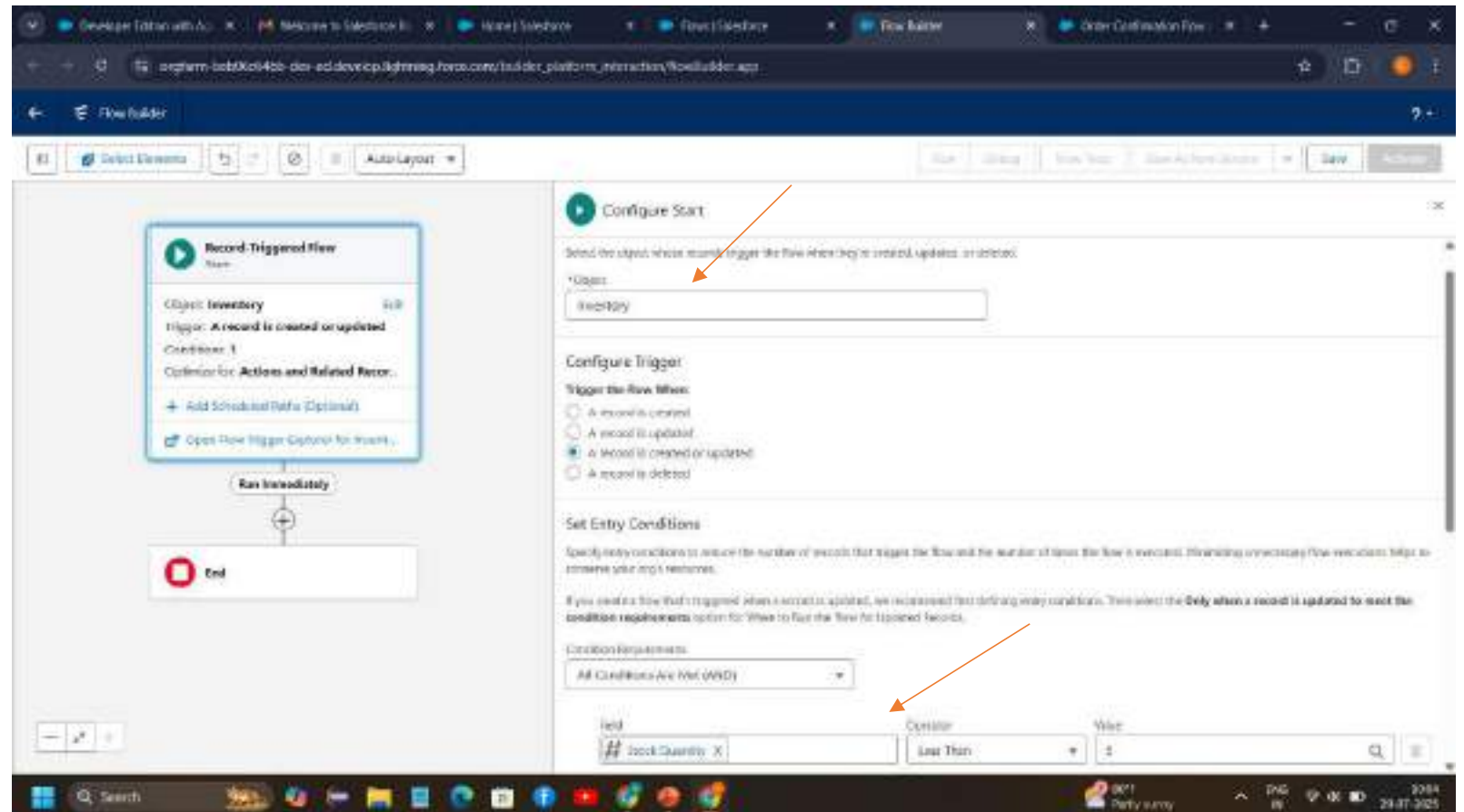
Trigger: When a record is created or updated

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

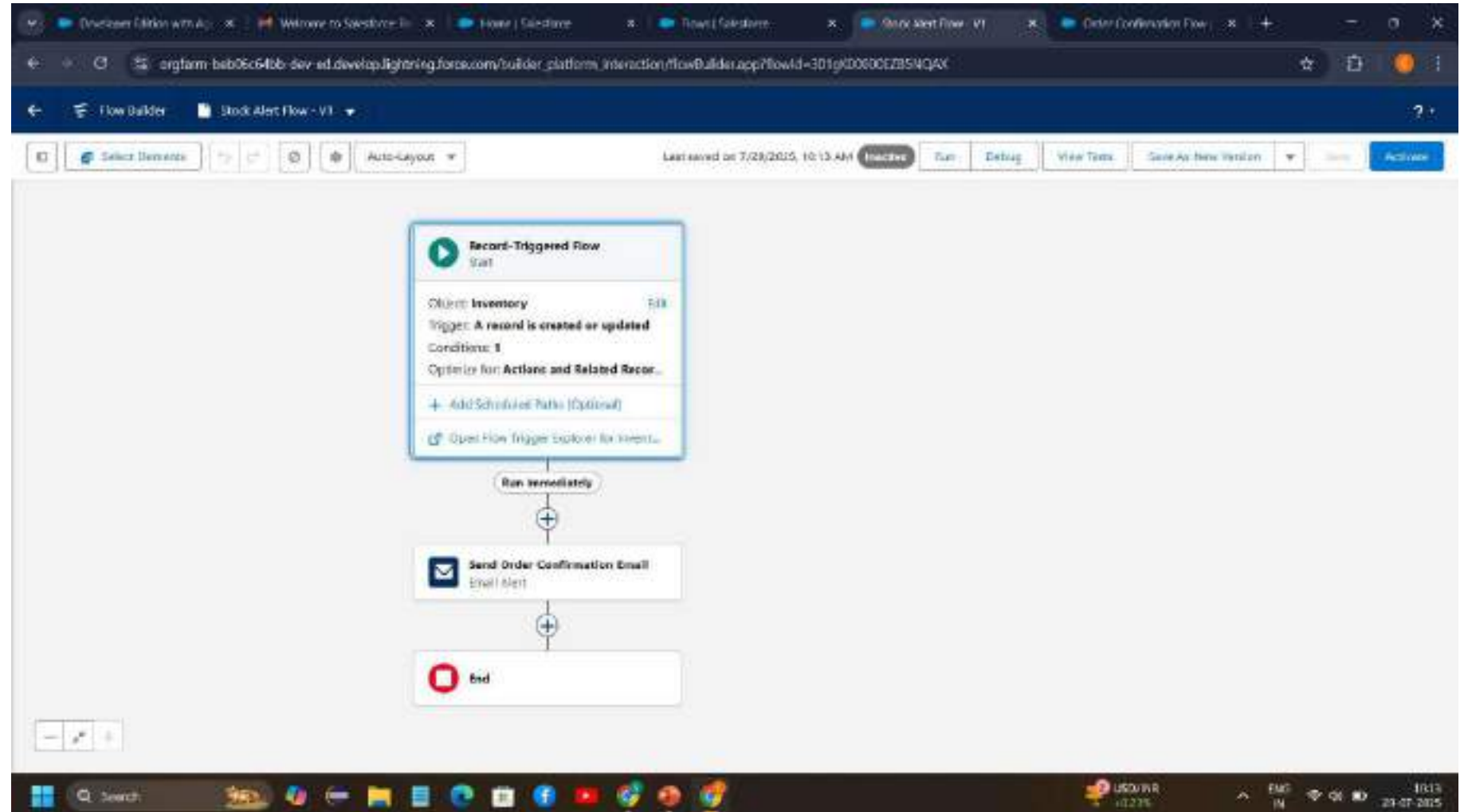
Create a new Email Alert (Similar to the Order Confirmation setup).

Recipient: Inventory Manager.

Save & Activate the Flow

Name: Stock Alert Flow

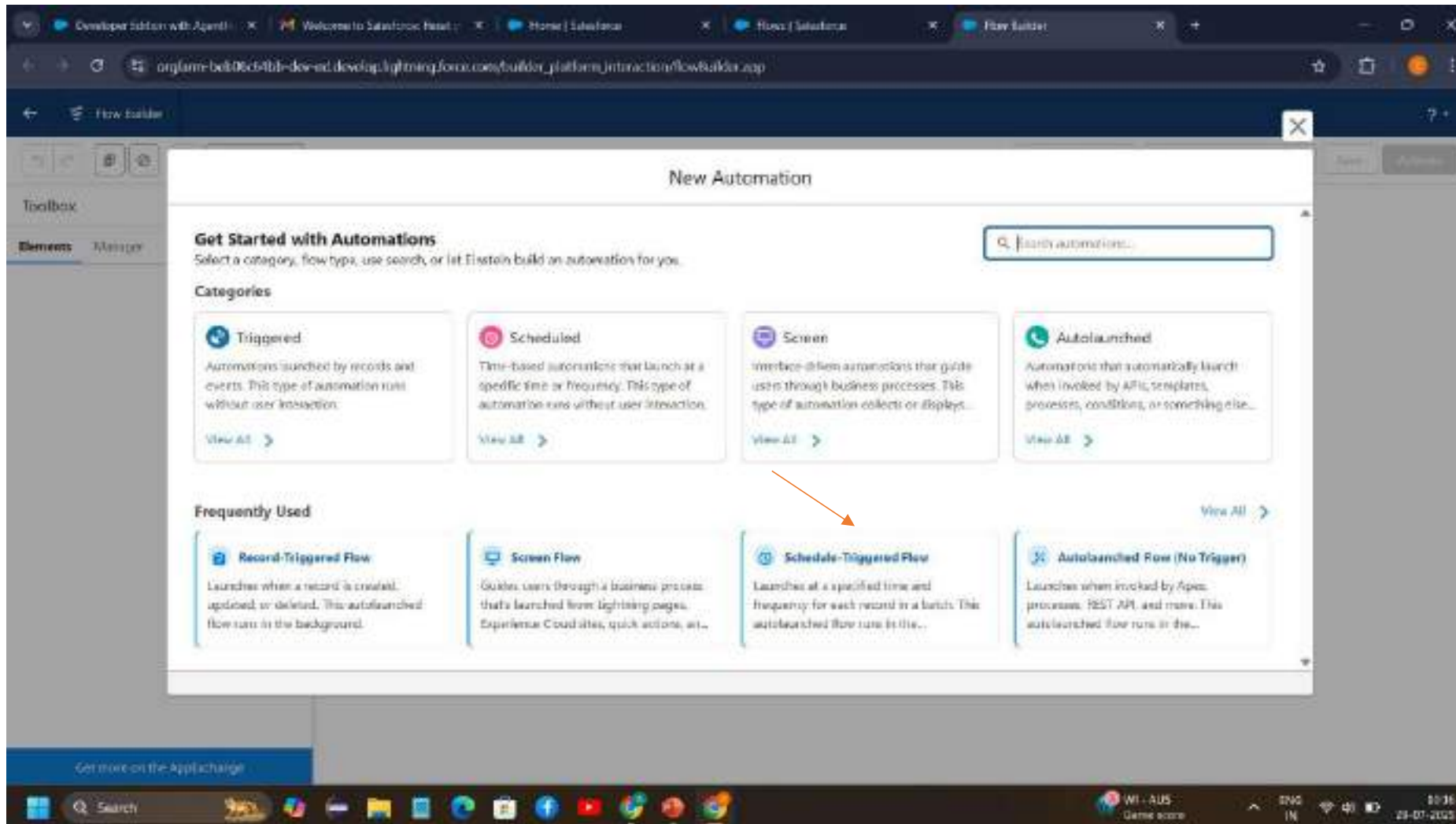
Click Save → Activate.



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 '5:30 AM'.
- Frequency:** A dropdown menu with 'Daily' selected.

An orange arrow points from the 'Frequency' dropdown menu 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-b6b06c54bb-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 '10:18' on '21-07-2025'.

Add "Get Records" Element

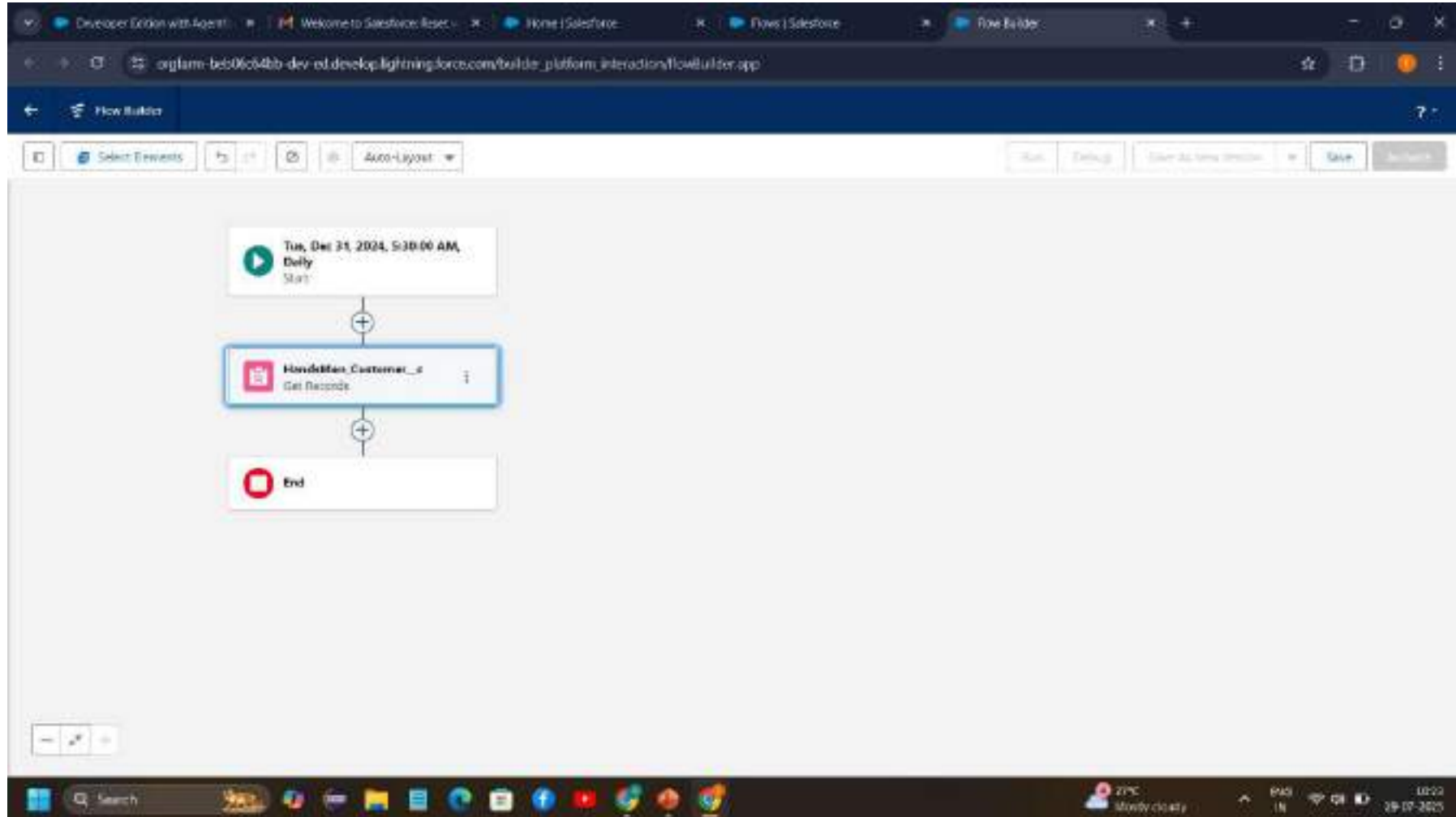
Click the "+" icon → Select Get Records.

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

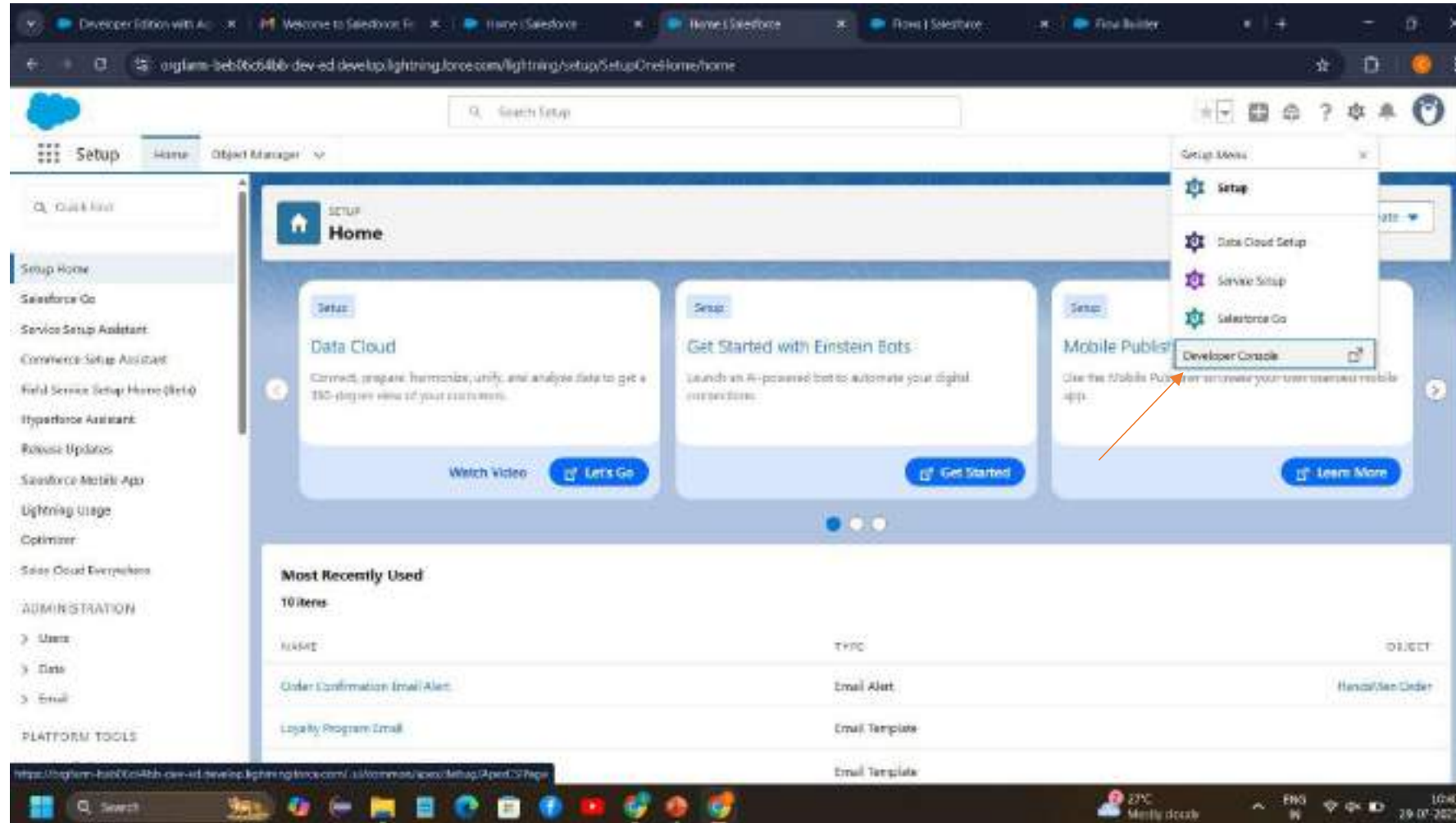
Click Save → Activate.



Automation using Apex

Create Apex Class

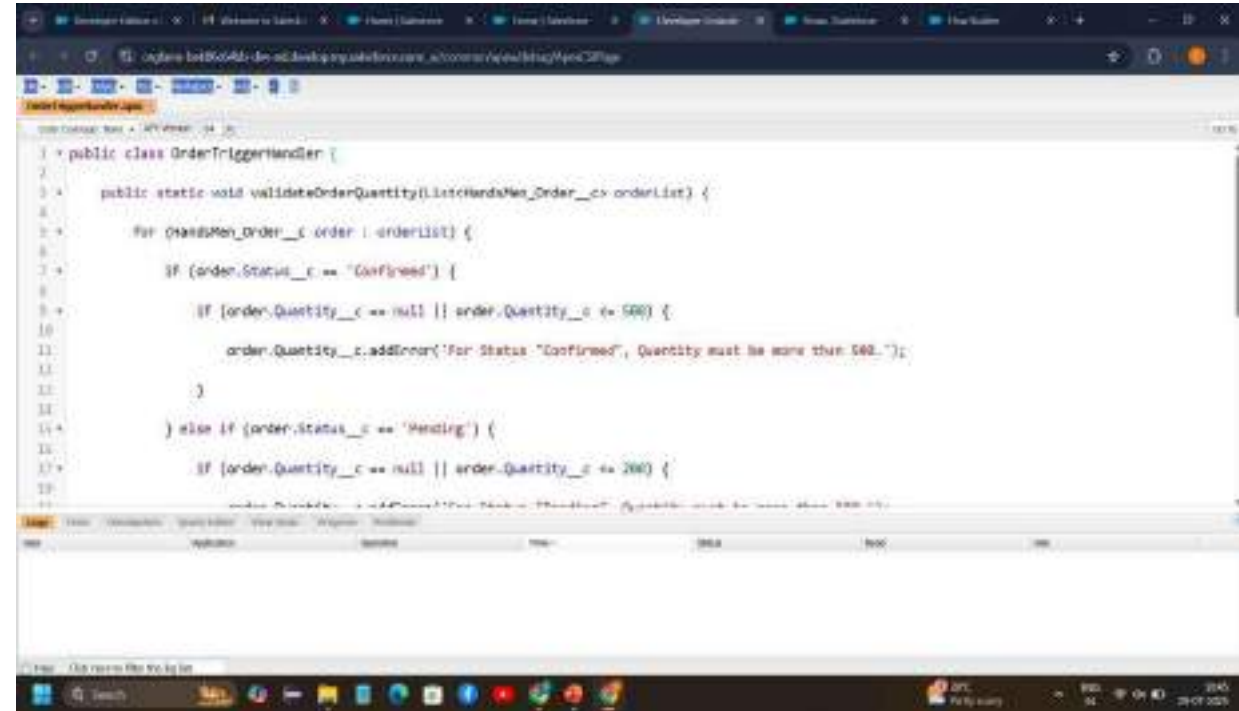
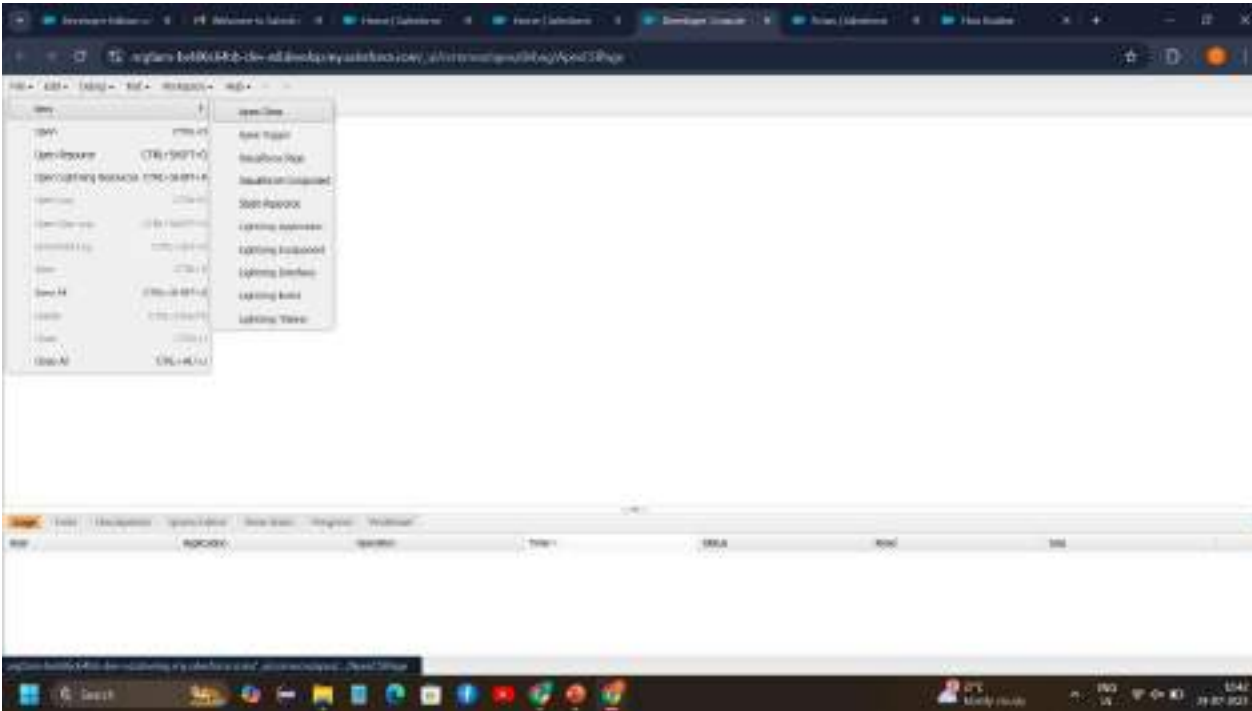
Go to Setup → Click on the gear icon → Select Developer Console.



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.



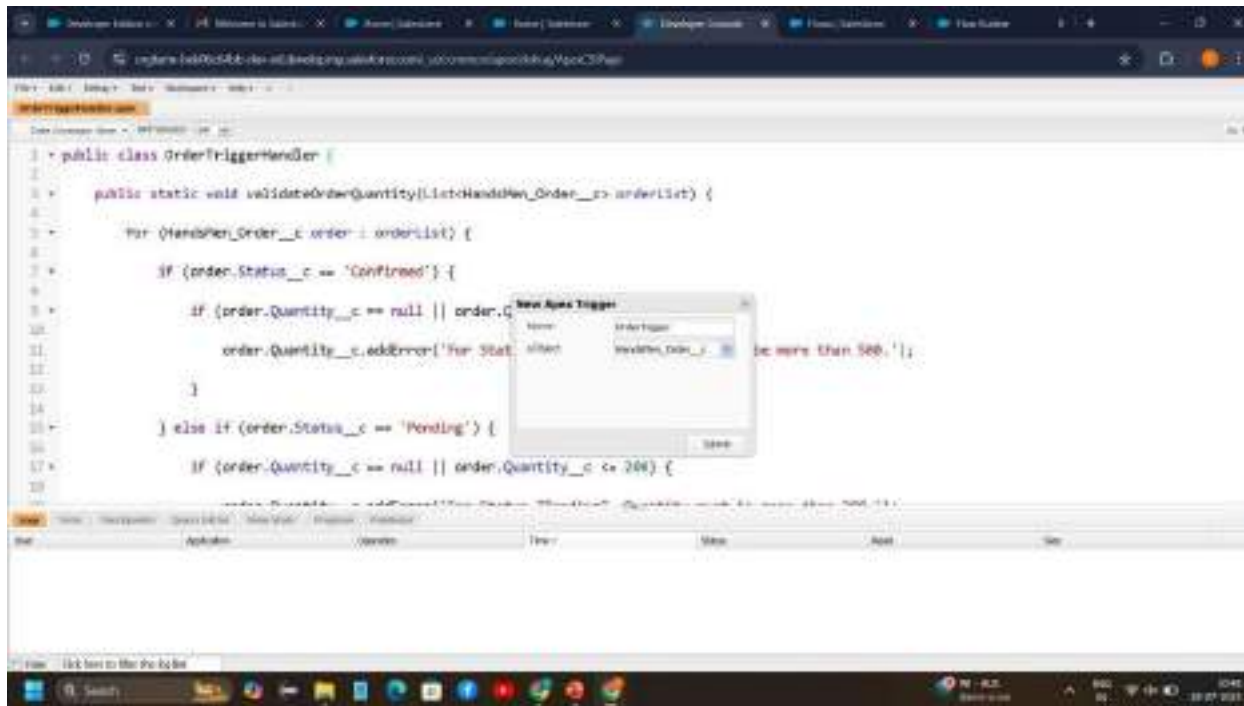
To create a new Apex Trigger follow the below steps:

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 Trigger Handler code for OrderTrigger. The code 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 status, order quantity 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) {  
18  
19  
20  
21  
22  
23  
24  
25  
26  
27  
28  
29  
30  
31  
32  
33  
34  
35  
36  
37  
38  
39  
40  
41  
42  
43  
44  
45  
46  
47  
48  
49  
50  
51  
52  
53  
54  
55  
56  
57  
58  
59  
60  
61  
62  
63  
64  
65  
66  
67  
68  
69  
70  
71  
72  
73  
74  
75  
76  
77  
78  
79  
80  
81  
82  
83  
84  
85  
86  
87  
88  
89  
90  
91  
92  
93  
94  
95  
96  
97  
98  
99  
100  
101  
102  
103  
104  
105  
106  
107  
108  
109  
110  
111  
112  
113  
114  
115  
116  
117  
118  
119  
120  
121  
122  
123  
124  
125  
126  
127  
128  
129  
130  
131  
132  
133  
134  
135  
136  
137  
138  
139  
140  
141  
142  
143  
144  
145  
146  
147  
148  
149  
150  
151  
152  
153  
154  
155  
156  
157  
158  
159  
160  
161  
162  
163  
164  
165  
166  
167  
168  
169  
170  
171  
172  
173  
174  
175  
176  
177  
178  
179  
180  
181  
182  
183  
184  
185  
186  
187  
188  
189  
190  
191  
192  
193  
194  
195  
196  
197  
198  
199  
200  
201  
202  
203  
204  
205  
206  
207  
208  
209  
210  
211  
212  
213  
214  
215  
216  
217  
218  
219  
220  
221  
222  
223  
224  
225  
226  
227  
228  
229  
230  
231  
232  
233  
234  
235  
236  
237  
238  
239  
240  
241  
242  
243  
244  
245  
246  
247  
248  
249  
250  
251  
252  
253  
254  
255  
256  
257  
258  
259  
260  
261  
262  
263  
264  
265  
266  
267  
268  
269  
270  
271  
272  
273  
274  
275  
276  
277  
278  
279  
280  
281  
282  
283  
284  
285  
286  
287  
288  
289  
290  
291  
292  
293  
294  
295  
296  
297  
298  
299  
300  
301  
302  
303  
304  
305  
306  
307  
308  
309  
310  
311  
312  
313  
314  
315  
316  
317  
318  
319  
320  
321  
322  
323  
324  
325  
326  
327  
328  
329  
330  
331  
332  
333  
334  
335  
336  
337  
338  
339  
340  
341  
342  
343  
344  
345  
346  
347  
348  
349  
350  
351  
352  
353  
354  
355  
356  
357  
358  
359  
360  
361  
362  
363  
364  
365  
366  
367  
368  
369  
370  
371  
372  
373  
374  
375  
376  
377  
378  
379  
380  
381  
382  
383  
384  
385  
386  
387  
388  
389  
390  
391  
392  
393  
394  
395  
396  
397  
398  
399  
400  
401  
402  
403  
404  
405  
406  
407  
408  
409  
410  
411  
412  
413  
414  
415  
416  
417  
418  
419  
420  
421  
422  
423  
424  
425  
426  
427  
428  
429  
430  
431  
432  
433  
434  
435  
436  
437  
438  
439  
440  
441  
442  
443  
444  
445  
446  
447  
448  
449  
450  
451  
452  
453  
454  
455  
456  
457  
458  
459  
460  
461  
462  
463  
464  
465  
466  
467  
468  
469  
470  
471  
472  
473  
474  
475  
476  
477  
478  
479  
480  
481  
482  
483  
484  
485  
486  
487  
488  
489  
490  
491  
492  
493  
494  
495  
496  
497  
498  
499  
500  
501  
502  
503  
504  
505  
506  
507  
508  
509  
510  
511  
512  
513  
514  
515  
516  
517  
518  
519  
520  
521  
522  
523  
524  
525  
526  
527  
528  
529  
530  
531  
532  
533  
534  
535  
536  
537  
538  
539  
540  
541  
542  
543  
544  
545  
546  
547  
548  
549  
550  
551  
552  
553  
554  
555  
556  
557  
558  
559  
560  
561  
562  
563  
564  
565  
566  
567  
568  
569  
570  
571  
572  
573  
574  
575  
576  
577  
578  
579  
580  
581  
582  
583  
584  
585  
586  
587  
588  
589  
590  
591  
592  
593  
594  
595  
596  
597  
598  
599  
600  
601  
602  
603  
604  
605  
606  
607  
608  
609  
610  
611  
612  
613  
614  
615  
616  
617  
618  
619  
620  
621  
622  
623  
624  
625  
626  
627  
628  
629  
630  
631  
632  
633  
634  
635  
636  
637  
638  
639  
640  
641  
642  
643  
644  
645  
646  
647  
648  
649  
650  
651  
652  
653  
654  
655  
656  
657  
658  
659  
660  
661  
662  
663  
664  
665  
666  
667  
668  
669  
670  
671  
672  
673  
674  
675  
676  
677  
678  
679  
680  
681  
682  
683  
684  
685  
686  
687  
688  
689  
690  
691  
692  
693  
694  
695  
696  
697  
698  
699  
700  
701  
702  
703  
704  
705  
706  
707  
708  
709  
710  
711  
712  
713  
714  
715  
716  
717  
718  
719  
720  
721  
722  
723  
724  
725  
726  
727  
728  
729  
730  
731  
732  
733  
734  
735  
736  
737  
738  
739  
740  
741  
742  
743  
744  
745  
746  
747  
748  
749  
750  
751  
752  
753  
754  
755  
756  
757  
758  
759  
760  
761  
762  
763  
764  
765  
766  
767  
768  
769  
770  
771  
772  
773  
774  
775  
776  
777  
778  
779  
780  
781  
782  
783  
784  
785  
786  
787  
788  
789  
790  
791  
792  
793  
794  
795  
796  
797  
798  
799  
800  
801  
802  
803  
804  
805  
806  
807  
808  
809  
810  
811  
812  
813  
814  
815  
816  
817  
818  
819  
820  
821  
822  
823  
824  
825  
826  
827  
828  
829  
830  
831  
832  
833  
834  
835  
836  
837  
838  
839  
840  
841  
842  
843  
844  
845  
846  
847  
848  
849  
850  
851  
852  
853  
854  
855  
856  
857  
858  
859  
860  
861  
862  
863  
864  
865  
866  
867  
868  
869  
870  
871  
872  
873  
874  
875  
876  
877  
878  
879  
880  
881  
882  
883  
884  
885  
886  
887  
888  
889  
890  
891  
892  
893  
894  
895  
896  
897  
898  
899  
900  
901  
902  
903  
904  
905  
906  
907  
908  
909  
910  
911  
912  
913  
914  
915  
916  
917  
918  
919  
920  
921  
922  
923  
924  
925  
926  
927  
928  
929  
930  
931  
932  
933  
934  
935  
936  
937  
938  
939  
940  
941  
942  
943  
944  
945  
946  
947  
948  
949  
950  
951  
952  
953  
954  
955  
956  
957  
958  
959  
960  
961  
962  
963  
964  
965  
966  
967  
968  
969  
970  
971  
972  
973  
974  
975  
976  
977  
978  
979  
980  
981  
982  
983  
984  
985  
986  
987  
988  
989  
990  
991  
992  
993  
994  
995  
996  
997  
998  
999  
1000  
1001  
1002  
1003  
1004  
1005  
1006  
1007  
1008  
1009  
1010  
1011  
1012  
1013  
1014  
1015  
1016  
1017  
1018  
1019  
1020  
1021  
1022  
1023  
1024  
1025  
1026  
1027  
1028  
1029  
1030  
1031  
1032  
1033  
1034  
1035  
1036  
1037  
1038  
1039  
1040  
1041  
1042  
1043  
1044  
1045  
1046  
1047  
1048  
1049  
1050  
1051  
1052  
1053  
1054  
1055  
1056  
1057  
1058  
1059  
1060  
1061  
1062  
1063  
1064  
1065  
1066  
1067  
1068  
1069  
1070  
1071  
1072  
1073  
1074  
1075  
1076  
1077  
1078  
1079  
1080  
1081  
1082  
1083  
1084  
1085  
1086  
1087  
1088  
1089  
1090  
1091  
1092  
1093  
1094  
1095  
1096  
1097  
1098  
1099  
1100  
1101  
1102  
1103  
1104  
1105  
1106  
1107  
1108  
1109  
1110  
1111  
1112  
1113  
1114  
1115  
1116  
1117  
1118  
1119  
1120  
1121  
1122  
1123  
1124  
1125  
1126  
1127  
1128  
1129  
1130  
1131  
1132  
1133  
1134  
1135  
1136  
1137  
1138  
1139  
1140  
1141  
1142  
1143  
1144  
1145  
1146  
1147  
1148  
1149  
1150  
1151  
1152  
1153  
1154  
1155  
1156  
1157  
1158  
1159  
1160  
1161  
1162  
1163  
1164  
1165  
1166  
1167  
1168  
1169  
1170  
1171  
1172  
1173  
1174  
1175  
1176  
1177  
1178  
1179  
1180  
1181  
1182  
1183  
1184  
1185  
1186  
1187  
1188  
1189  
1190  
1191  
1192  
1193  
1194  
1195  
1196  
1197  
1198  
1199  
1200  
1201  
1202  
1203  
1204  
1205  
1206  
1207  
1208  
1209  
1210  
1211  
1212  
1213  
1214  
1215  
1216  
1217  
1218  
1219  
1220  
1221  
1222  
1223  
1224  
1225  
1226  
1227  
1228  
1229  
1230  
1231  
1232  
1233  
1234  
1235  
1236  
1237  
1238  
1239  
1240  
1241  
1242  
1243  
1244  
1245  
1246  
1247  
1248  
1249  
1250  
1251  
1252  
1253  
1254  
1255  
1256  
1257  
1258  
1259  
1260  
1261  
1262  
1263  
1264  
1265  
1266  
1267  
1268  
1269  
1270  
1271  
1272  
1273  
1274  
1275  
1276  
1277  
1278  
1279  
1280  
1281  
1282  
1283  
1284  
1285  
1286  
1287  
1288  
1289  
1290  
1291  
1292  
1293  
1294  
1295  
1296  
1297  
1298  
1299  
1300  
1301  
1302  
1303  
1304  
1305  
1306  
1307  
1308  
1309  
1310  
1311  
1312  
1313  
1314  
1315  
1316  
1317  
1318  
1319  
1320  
1321  
1322  
1323  
1324  
1325  
1326  
1327  
1328  
1329  
1330  
1331  
1332  
1333  
1334  
1335  
1336  
1337  
1338  
1339  
1340  
1341  
1342  
1343  
1344  
1345  
1346  
1347  
1348  
1349  
1350  
1351  
1352  
1353  
1354  
1355  
1356  
1357  
1358  
1359  
1360  
1361  
1362  
1363  
1364  
1365  
1366  
1367  
1368  
1369  
1370  
1371  
1372  
1373  
1374  
1375  
1376  
1377  
1378  
1379  
1380  
1381  
1382  
1383  
1384  
1385  
1386  
1387  
1388  
1389  
1390  
1391  
1392  
1393  
1394  
1395  
1396  
1397  
1398  
1399  
1400  
1401  
1402  
1403  
1404  
1405  
1406  
1407  
1408  
1409  
1410  
1411  
1412  
1413  
1414  
1415  
1416  
1417  
1418  
1419  
1420  
1421  
1422  
1423  
1424  
1425  
1426  
1427  
1428  
1429  
1430  
1431  
1432  
1433  
1434  
1435  
1436  
1437  
1438  
1439  
1440  
1441  
1442  
1443  
1444  
1445  
1446  
1447  
1448  
1449  
1450  
1451  
1452  
1453  
1454  
1455  
1456  
1457  
1458  
1459  
1460  
1461  
1462  
1463  
1464  
1465  
1466  
1467  
1468  
1469  
1470  
1471  
1472  
1473  
1474  
1475  
1476  
1477  
1478  
1479  
1480  
1481  
1482  
1483  
1484  
1485  
1486  
1487  
1488  
1489  
1490  
1491  
1492  
1493  
1494  
1495  
1496  
1497  
1498  
1499  
1500  
1501  
1502  
1503  
1504  
1505  
1506  
1507  
1508  
1509  
1510  
1511  
1512  
1513  
1514  
1515  
1516  
1517  
1518  
1519  
1520  
1521  
1522  
1523  
1524  
1525  
1526  
1527  
1528  
1529  
1530  
1531  
1532  
1533  
1534  
1535  
1536  
1537  
1538  
1539  
1540  
1541  
1542  
1543  
1544  
1545  
1546  
1547  
1548  
1549  
1550  
1551  
1552  
1553  
1554  
1555  
1556  
1557  
1558  
1559  
1560  
1561  
1562  
1563  
1564  
1565  
1566  
1567  
1568  
1569  
1570  
1571  
1572  
1573  
1574  
1575  
1576  
1577  
1578  
1579  
1580  
1581  
1582  
1583  
1584  
1585  
1586  
1587  
1588  
1589  
1590  
1591  
1592  
1593  
1594  
1595  
1596  
1597  
1598  
1599  
1600  
1601  
1602  
1603  
1604  
1605  
1606  
1607  
1608  
1609  
1610  
1611  
1612  
1613  
1614  
1615  
1616  
1617  
1618  
1619  
1620  
1621  
1622  
1623  
1624  
1625  
1626  
1627  
1628  
1629  
1630  
1631  
1632  
1633  
1634  
1635  
1636  
1637  
1638  
1639  
1640  
1641  
1642  
1643  
1644  
1645  
1646  
1647  
1648  
1649  
1650  
1651  
1652  
1653  
1654  
1655  
1656  
1657  
1658  
1659  
1660  
1661  
1662  
1663  
1664  
1665  
1666  
1667  
1668  
1669  
1670  
1671  
1672  
1673  
1674  
1675  
1676  
1677  
1678  
1679  
1680  
1681  
1682  
1683  
1684  
1685  
1686  
1687  
1688  
1689  
1690  
1691  
1692  
1693  
1694  
1695  
1696  
1697  
1698  
1699  
1700  
1701  
1702  
1703  
1704  
1705  
1706  
1707  
1708  
1709  
1710  
1711  
1712  
1713  
1714  
1715  
1716  
1717  
1718  
1719  
1720  
1721  
1722  
1723  
1724  
1725  
1726  
1727  
1728  
1729  
1730  
1731  
1732  
1733  
1734  
1735  
1736  
1737  
1738  
1739  
1740  
1741  
1742  
1743  
1744  
1745  
1746  
1747  
1748  
1749  
1750  
1751  
1752  
1753  
1754  
1755  
1756  
1757  
1758  
1759  
1760  
1761  
1762  
1763  
1764  
1765  
1766  
1767  
1768  
1769  
1770  
1771  
1772  
1773  
1774  
1775  
1776  
1777  
1778  
1779  
1780  
1781  
1782  
1783  
1784  
1785  
1786  
1787  
1788  
1789  
1790  
1791  
1792  
1793  
1794  
1795  
1796  
1797  
1798  
1799  
1800  
1801  
1802  
1803  
1804  
1805  
1806  
1807  
1808  
1809  
1810  
1811  
1812  
1813  
1814  
1815  
1816  
1817  
1818  
1819  
1820  
1821  
1822  
1823  
1824  
1825  
1826  
1827  
1828  
1829  
1830  
1831  
1832  
1833  
1834  
1835  
1836  
1837  
1838  
1839  
1840  
1841  
1842  
1843  
1844  
1845  
1846  
1847  
1848  
1849  
1850  
1851  
1852  
1853  
1854  
1855  
1856  
1857  
1858  
1859  
1860  
1861  
1862  
1863  
1864  
1865  
1866  
1867  
1868  
1869  
1870  
1871  
1872  
1873  
1874  
1875  
1876  
1877  
1878  
1879  
1880  
1881  
1882  
1883  
1884  
1885  
1886  
1887  
1888  
1889  
1890  
1891  
1892  
1893  
1894  
1895  
1896  
1897  
1898  
1899  
1900  
1901  
1902  
1903  
1904  
1905  
1906  
1907  
1908  
1909  
1910  
1911  
1912  
1913  
1914  
1915  
1916  
1917  
1918  
1919  
1920  
1921  
1922  
1923  
1924  
1925  
1926  
1927  
1928  
1929  
1930  
1931  
1932  
1933  
1934  
1935  
1936  
1937  
1938  
1939  
1940  
1941  
1942  
1943  
1944  
1945  
1946  
1947  
1948  
1949  
1950  
1951  
1952  
1953  
1954  
1955  
1956  
1957  
1958  
1959  
1960  
1961  
1962  
1963  
1964  
1965  
1966  
1967  
1968  
1969  
1970  
1971  
1972  
1973  
1974  
1975  
1976  
1977  
1978  
1979  
1980  
1981  
1982  
1983  
1984  
1985  
1986  
1987  
1988  
1989  
1990  
1991  
1992  
1993  
1994  
1995  
1996  
1997  
1998  
1999  
2000  
2001  
2002  
2003  
2004  
2005  
2006  
2007  
2008  
2009  
2010  
2011  
2012  
2013  
2014  
2015  
2016  
2017  
2018  
2019  
2020  
2021  
2022  
2023  
2024  
2025  
2026  
2027  
2028  
2029  
2030  
2031  
2032  
2033  
2034  
2035  
2036  
2037  
2038  
2039  
2040  
2041  
2042  
2043  
2044  
2045  
2046  
2047  
2048  
2049  
2050  
2051  
2052  
2053  
2054  
2055  
2056  
2057  
2058  
2059  
2060  
2061  
2062  
2063  
2064  
2065  
2066  
2067  
2068  
2069  
2070  
2071  
2072  
2073  
2074  
2075  
2076  
2077  
2078  
2079  
2080  
2081  
2082  
2083  
2084  
2085  
2086  
2087  
2088  
2089  
2090  
2091  
2092  
2093  
2094  
2095  
2096  
2097  
2098  
2099  
2100  
2101  
2102  
2103  
2104  
2105  
2106  
2107  
2108  
2109  
2110  
2111  
2112  
2113  
2114  
2115  
2116  
2117  
2118  
2119  
2120  
2121  
2122  
2123  
2124  
2125  
2126  
2127  
2128  
2129  
2130  
2131  
2132  
2133  
2134  
2135  
2136  
2137  
2138  
2139  
2140  
2141  
2142  
2143  
2144  
2145  
2146  
2147  
2148  
2149  
2150  
2151  
2152  
2153  
2154  
2155  
2156  
2157  
2158  
2159  
2160  
2161  
2162  
2163  
2164  
2165  
2166  
2167  
2168  
2169  
2170  
2171  
2172  
2173  
2174  
2
```

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.

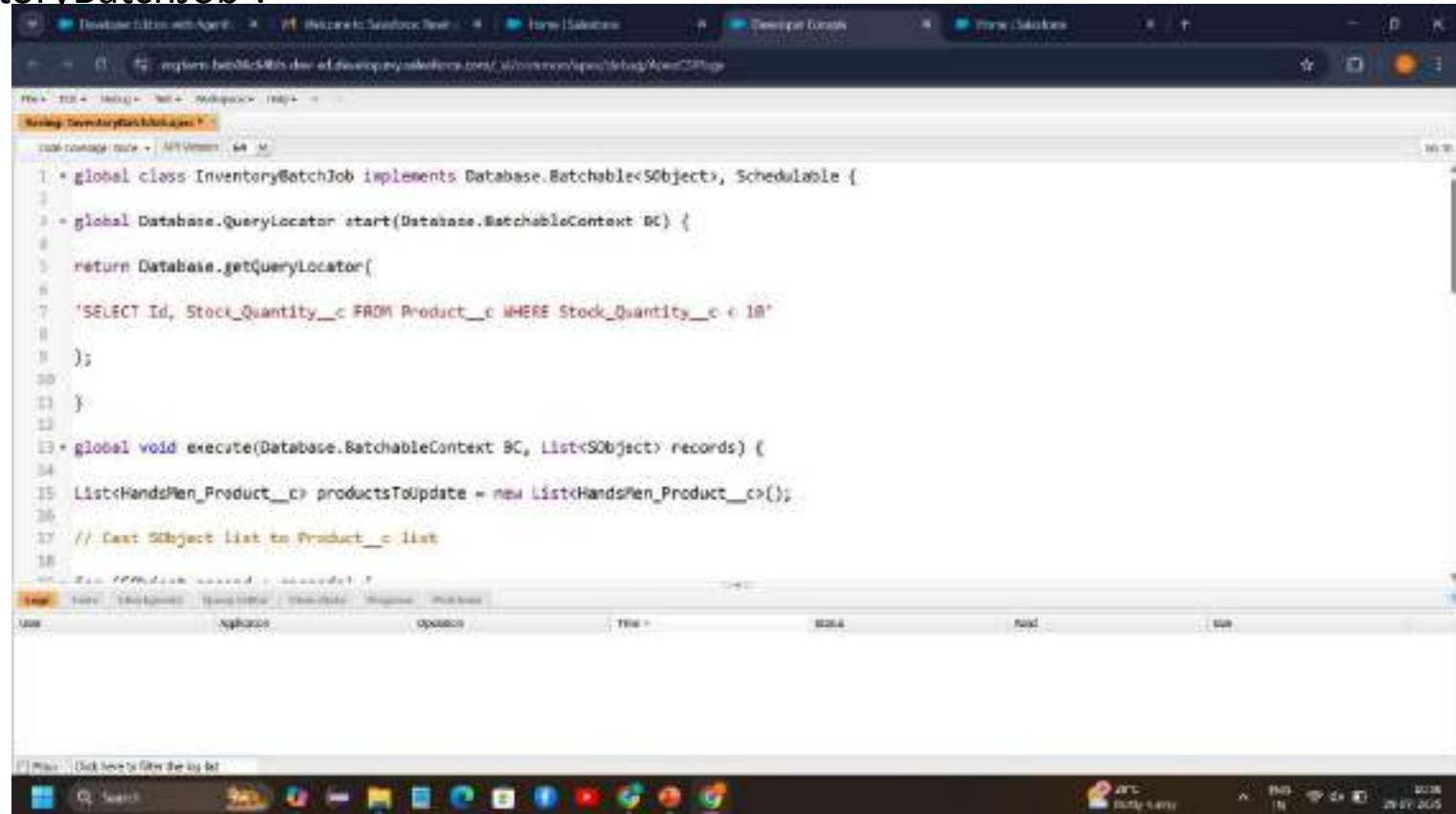
To create a new Apex Class follow the below steps:

Click on the file → New → Apex Class.

Give the Apex Class name as “InventoryBatchJob”.

Click ok.

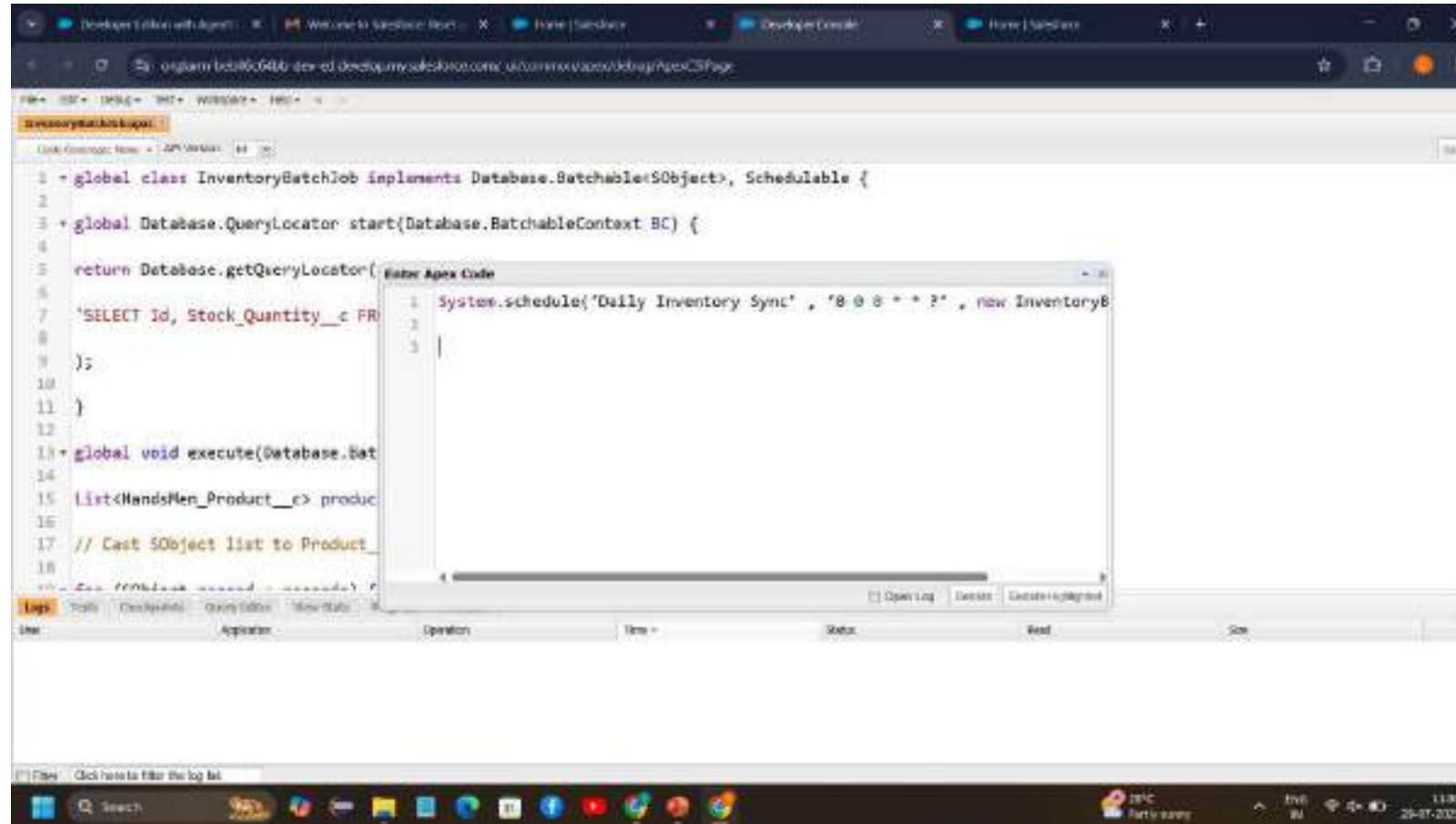
Now write the code logic here



```
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 }  
24 }  
25 }  
26 }  
27 }  
28 }  
29 }  
30 }  
31 }  
32 }  
33 }  
34 }  
35 }  
36 }  
37 }  
38 }  
39 }  
40 }  
41 }  
42 }  
43 }  
44 }  
45 }  
46 }  
47 }  
48 }  
49 }  
50 }  
51 }  
52 }  
53 }  
54 }  
55 }  
56 }  
57 }  
58 }  
59 }  
60 }  
61 }  
62 }  
63 }  
64 }  
65 }  
66 }  
67 }  
68 }  
69 }  
70 }  
71 }  
72 }  
73 }  
74 }  
75 }  
76 }  
77 }  
78 }  
79 }  
80 }  
81 }  
82 }  
83 }  
84 }  
85 }  
86 }  
87 }  
88 }  
89 }  
90 }  
91 }  
92 }  
93 }  
94 }  
95 }  
96 }  
97 }  
98 }  
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