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.

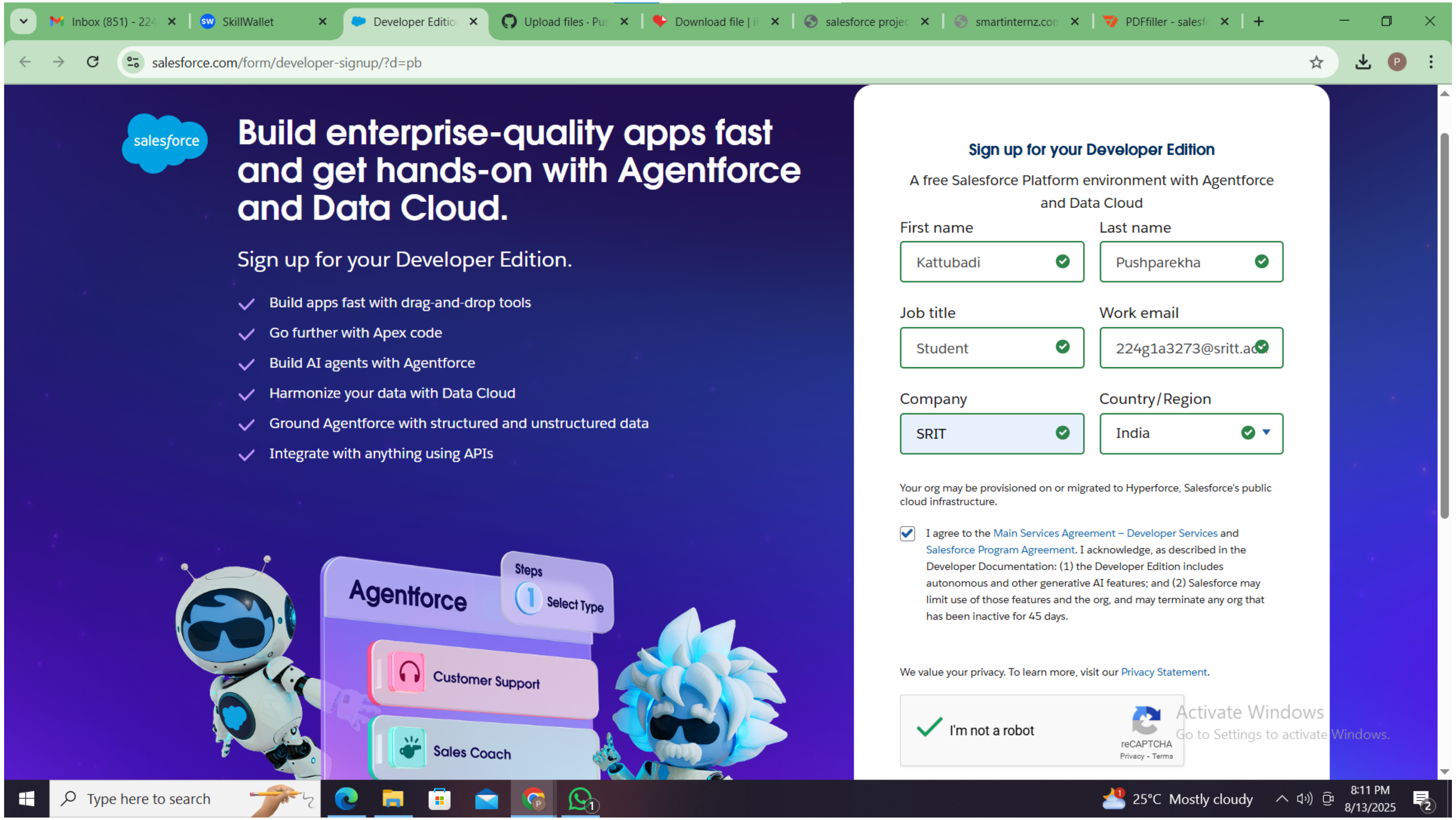
Train users on new functionality.

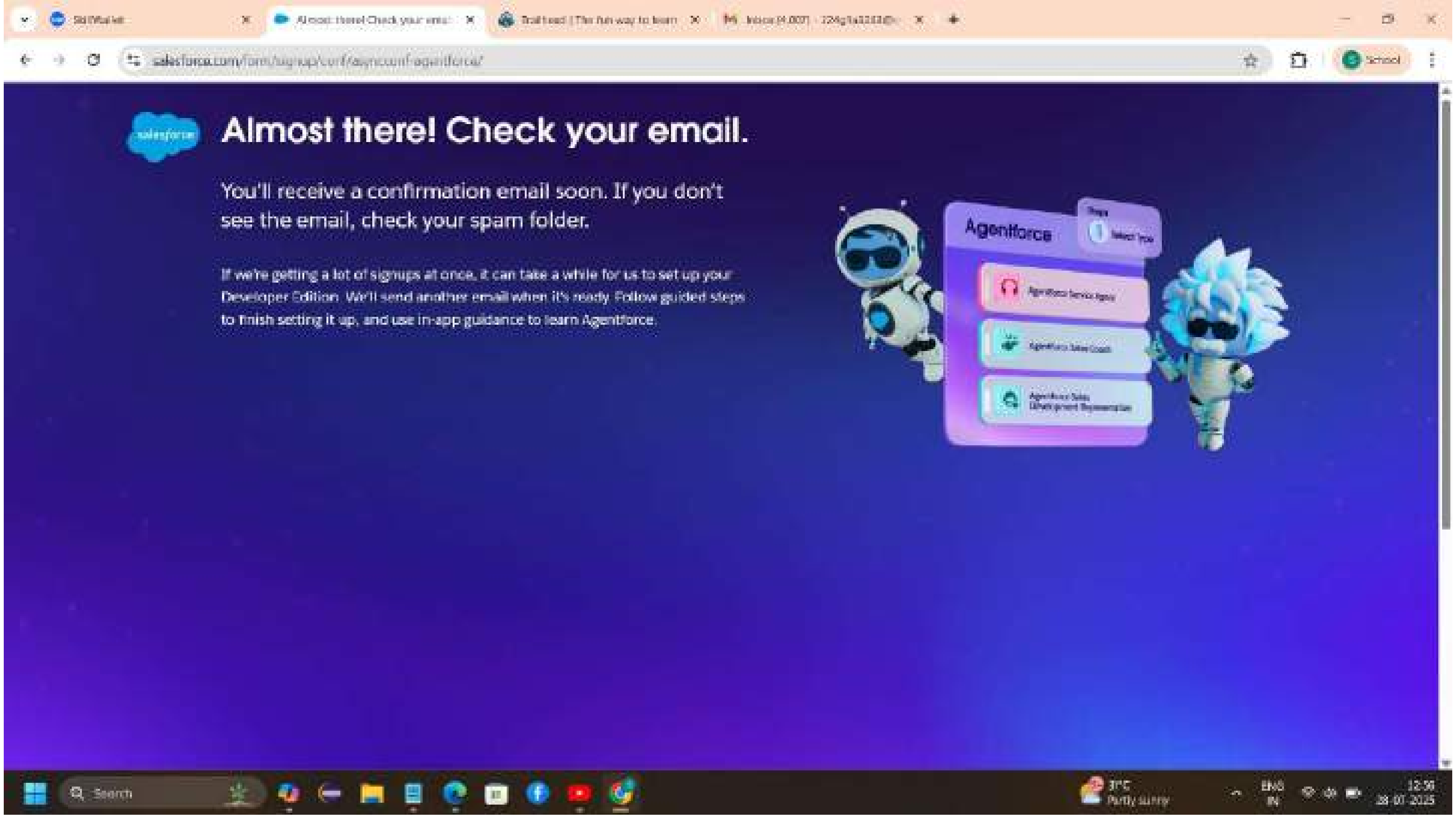
Post-go-live support and monitoring

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

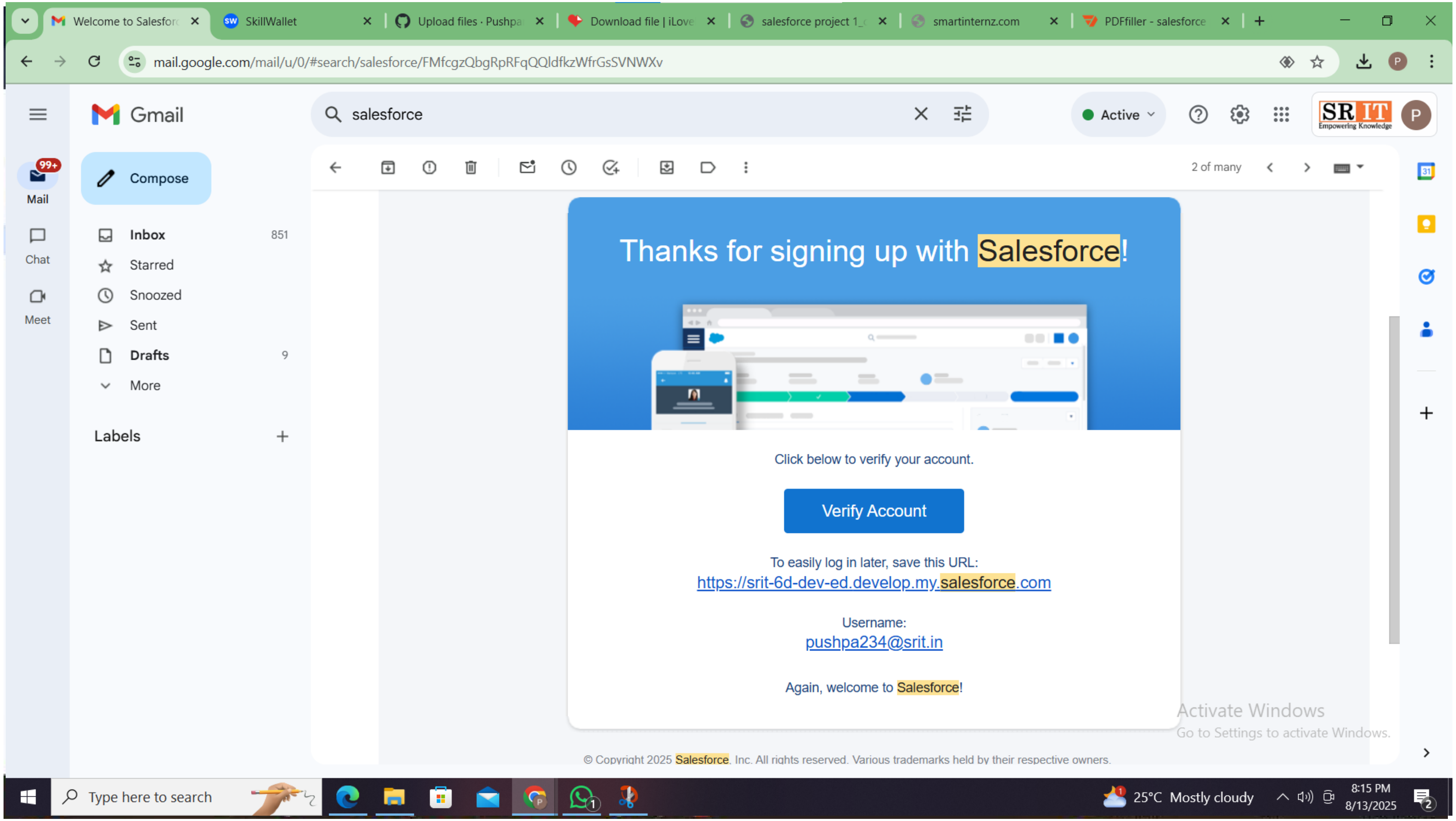
Salesforce Credentials Setup

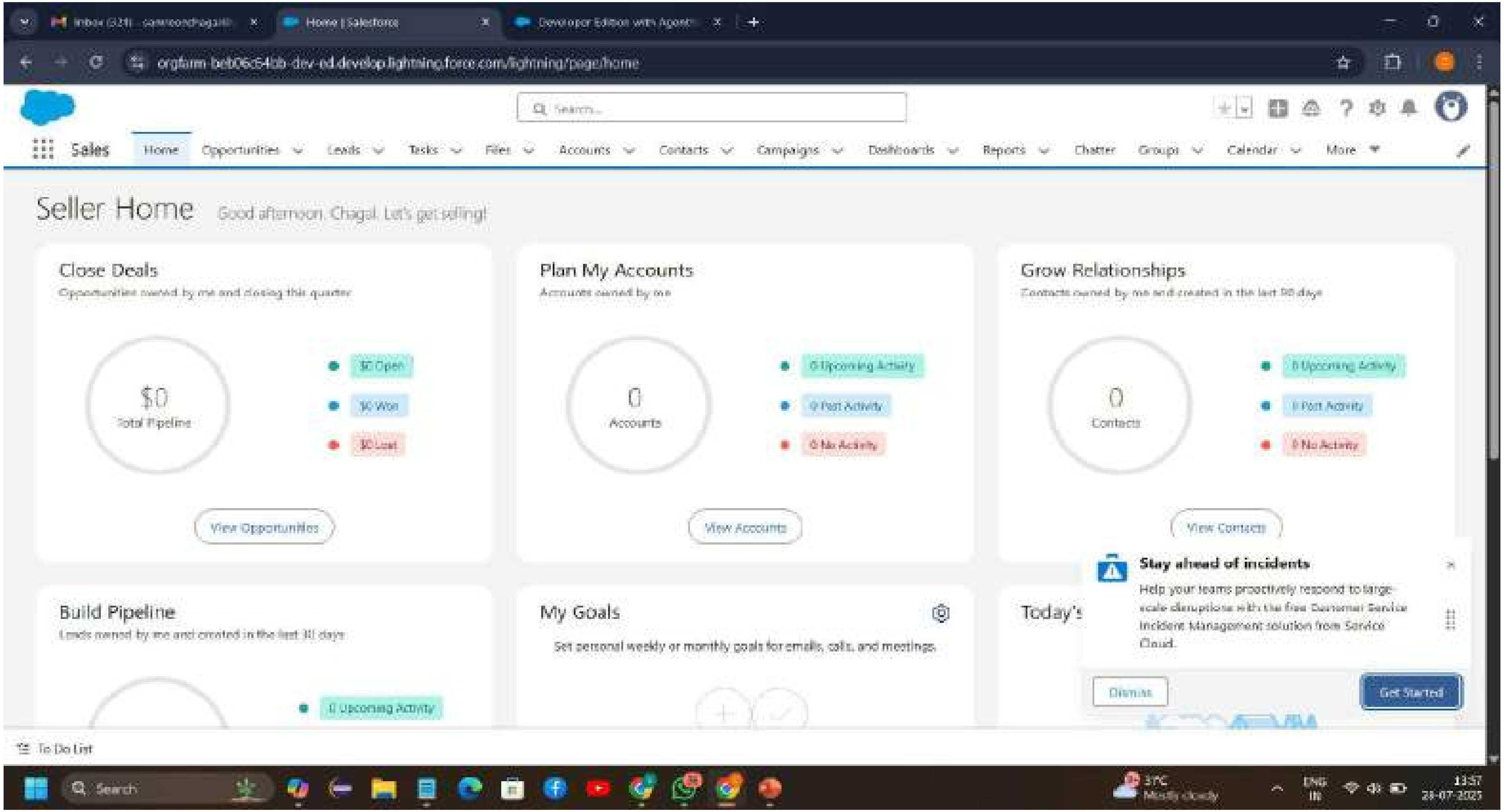
Creating Developer Account




salesforce.com/form/signup/conf/asyncconf-agentforce/
salesforce
Almost there! Check your email.
You'll receive a confirmation email soon. If you don't see the email, check your spam folder.
If we're getting a lot of signups at once, it can take a while for us to set up your Developer Edition. We'll send another email when it's ready. Follow guided steps to finish setting it up, and use in-app guidance to learn Agentforce.
Agentforce
Search
School

Account Activation




Home | Salesforce
orgfarm-beb06c54bb-dev-ed.develop.lightning.force.com/lightning/page/home
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
$0
Total Pipeline
View Opportunities
Plan My Accounts
Accounts owned by me
0
Accounts
View Accounts
Grow Relationships
Contacts owned by me and created in the last 90 days
0
Contacts
View Contacts
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
Build Pipeline
Leads owned by me and created in the last 30 days
My Goals
Set personal weekly or monthly goals for emails, calls, and meetings.
To Do List

Data Management - Objects

The following are the Custom objects which we need to create

HandsMen Customer

HandsMen Order

HandsMen Product

Inventory

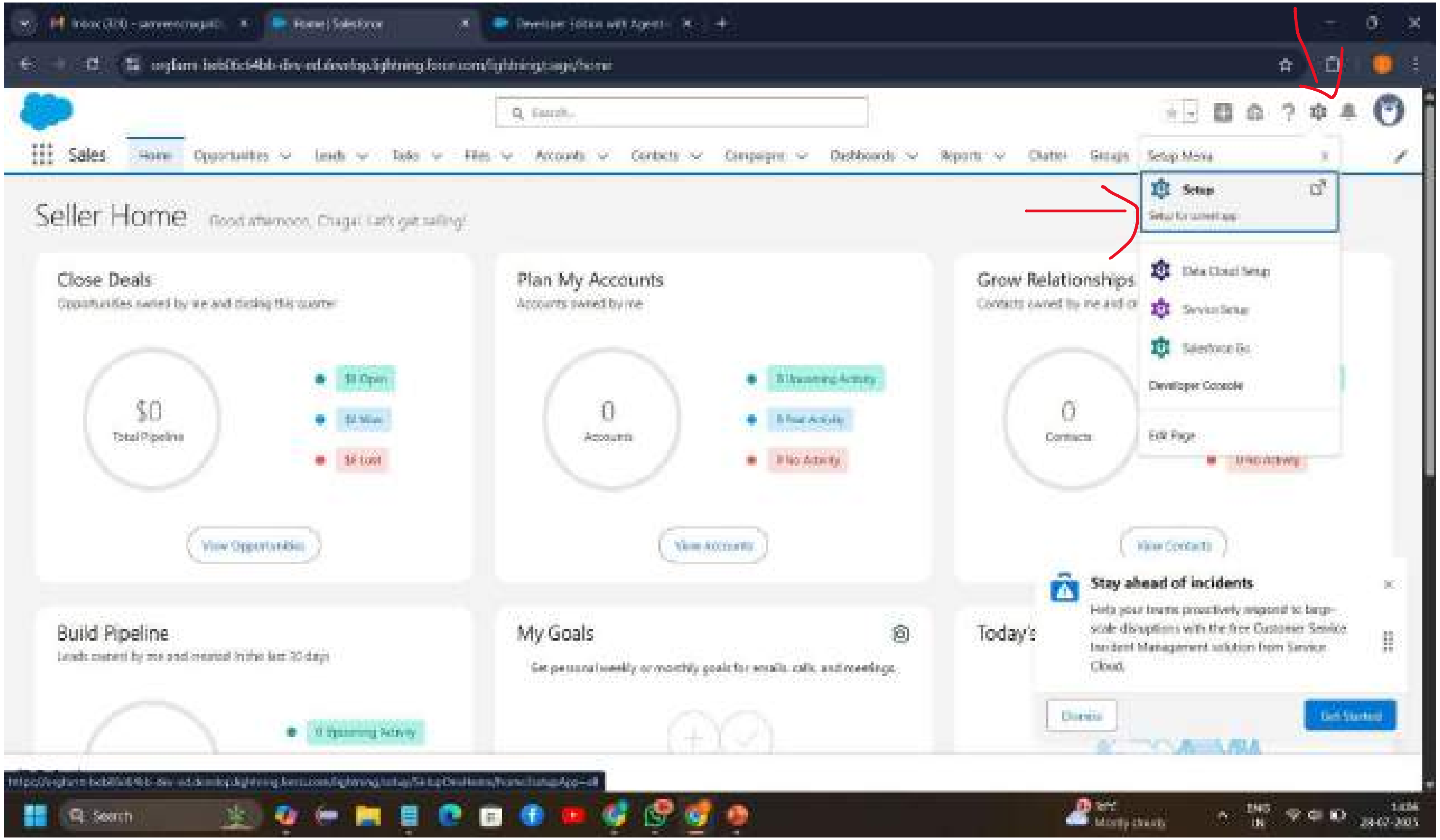
Marketing Campaign

Object - HandsMen Customer

Description

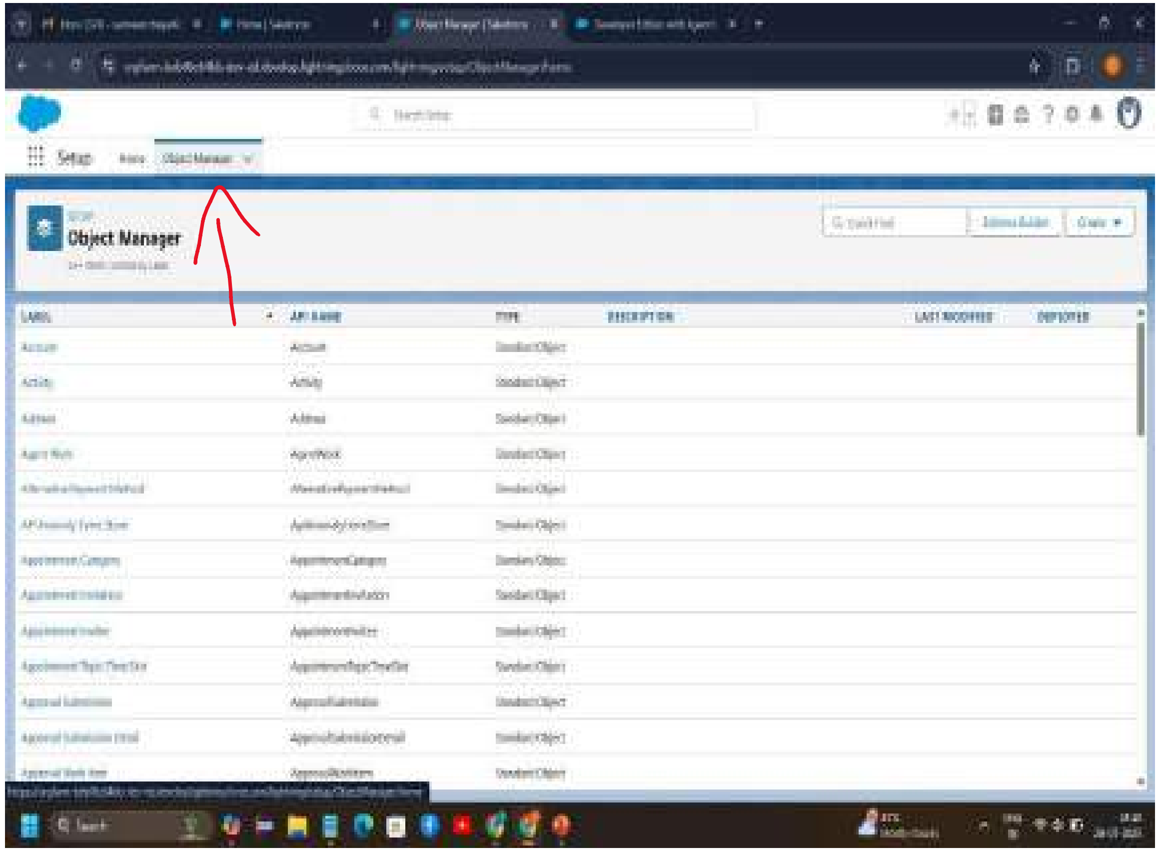
To Navigate to Setup page:

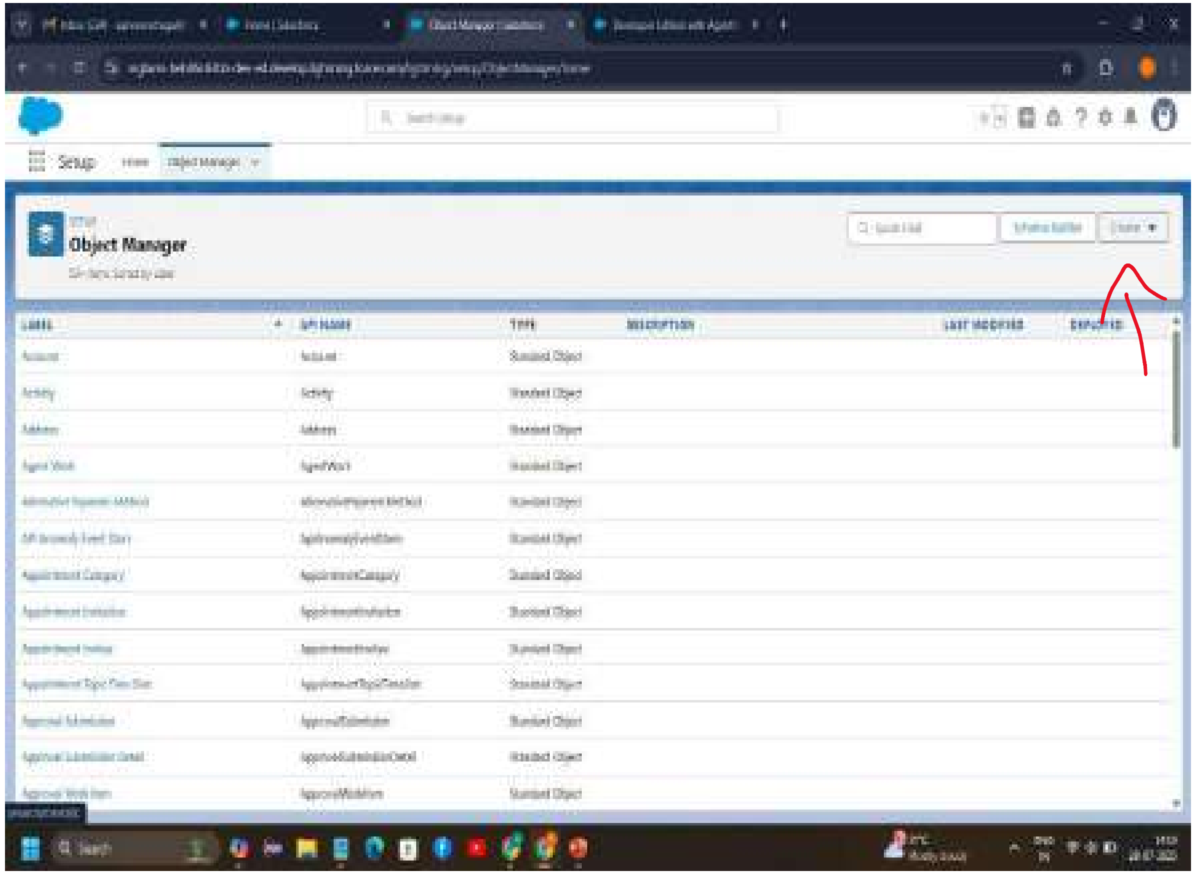
Click on gear icon → click setup.



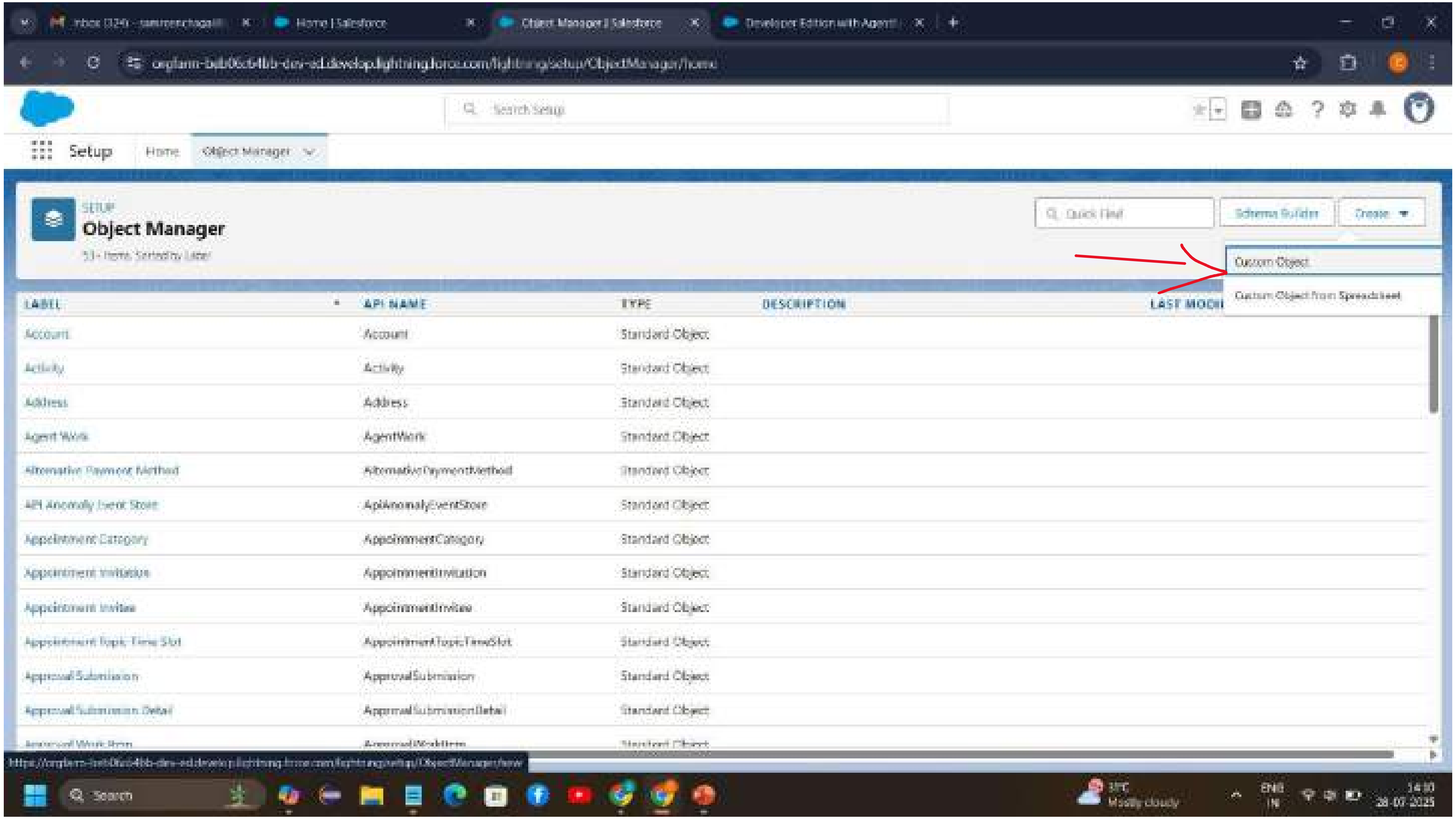
To create an object:

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

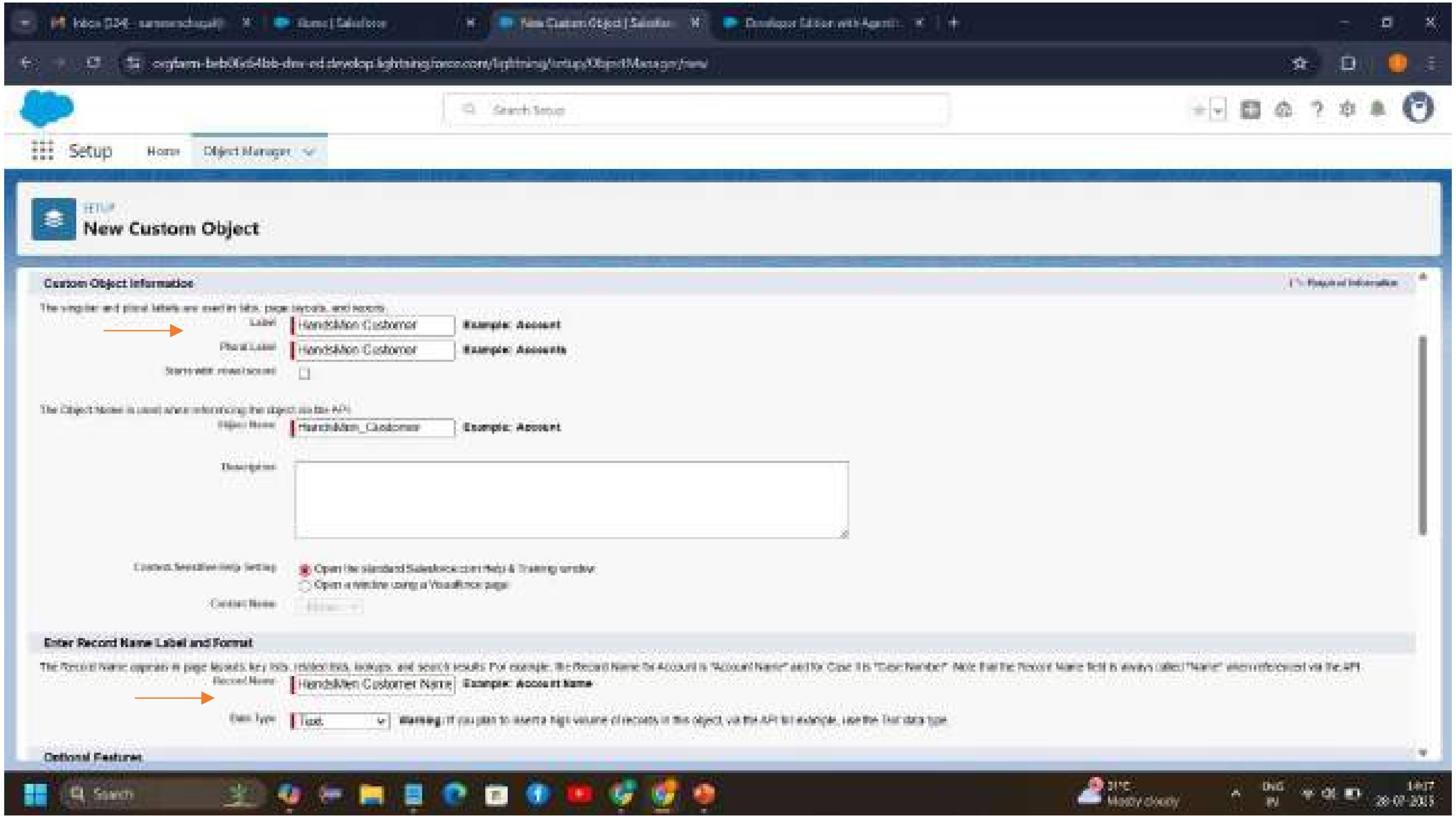




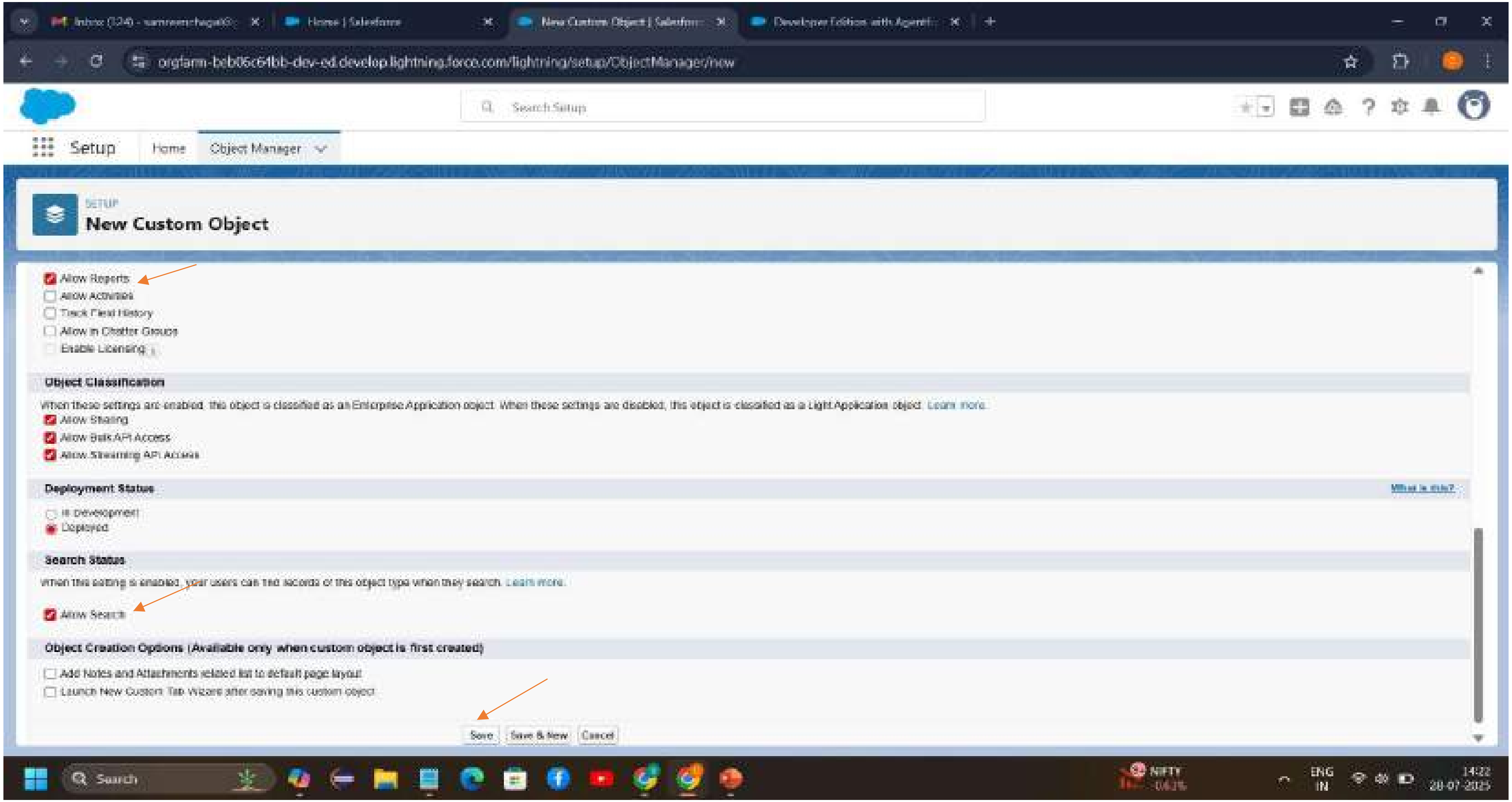
Click on Custom Object



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

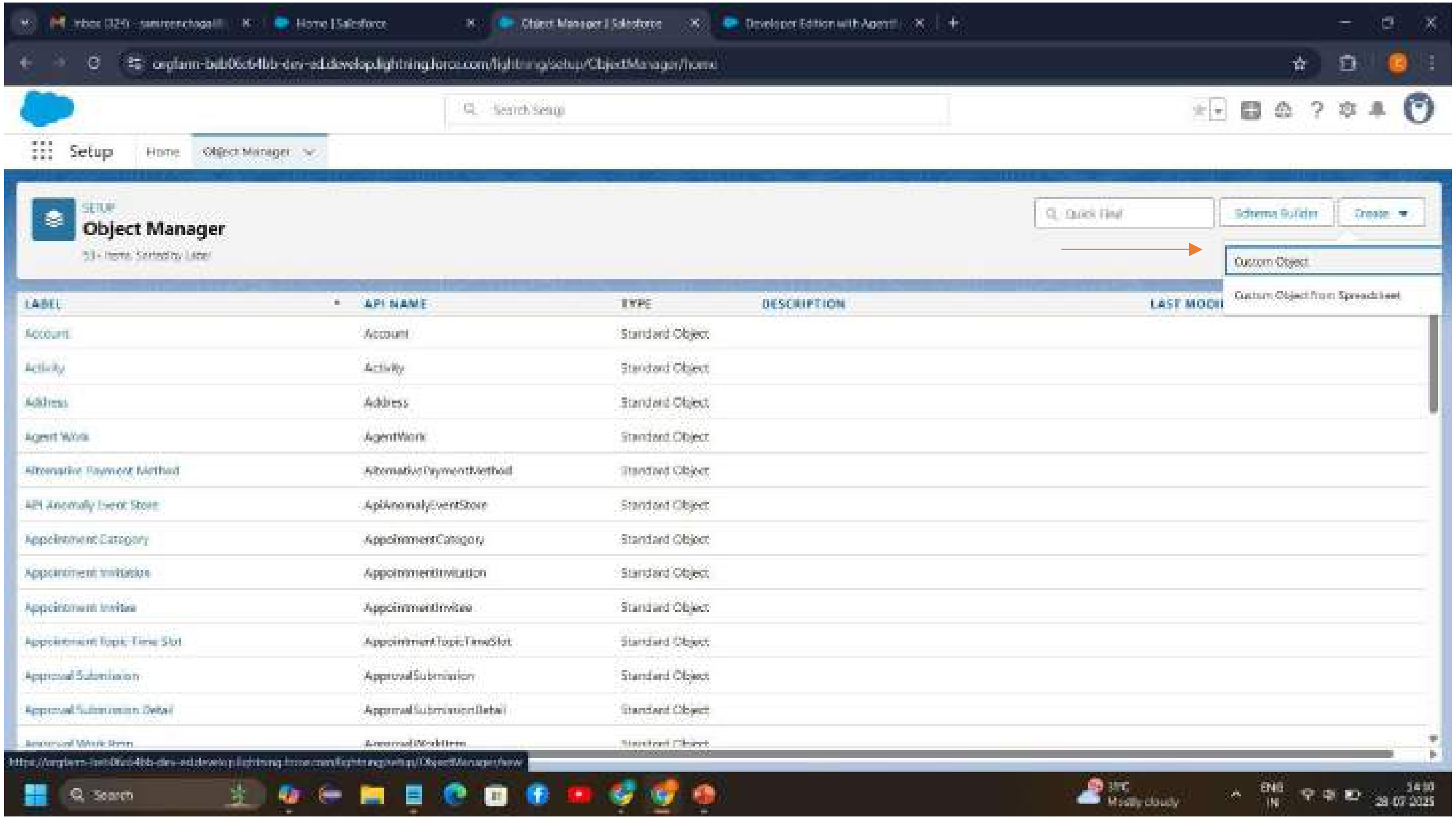


Click on Allow reports,
Allow search → **Save.**



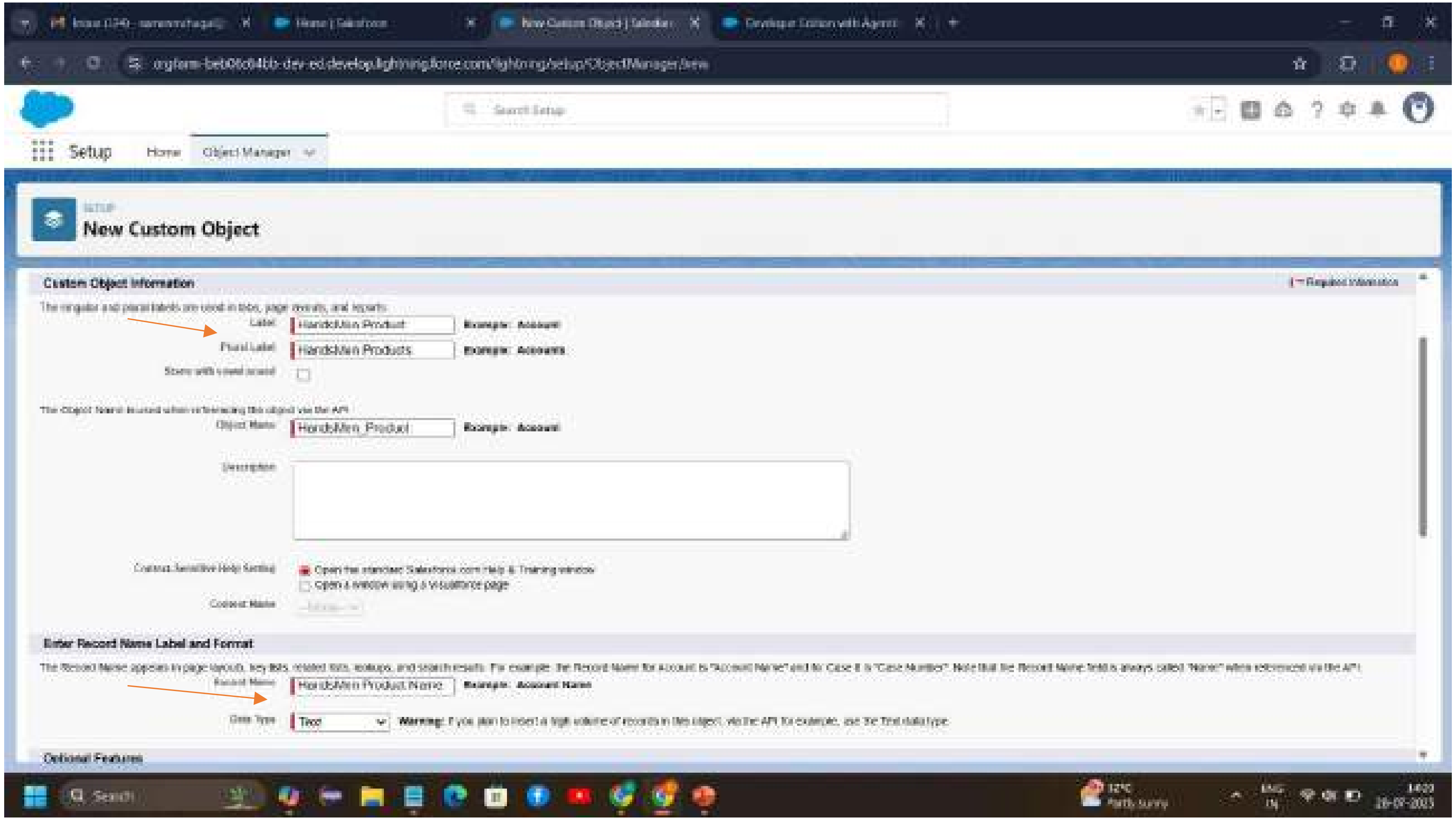
Create HandsMen Product Object

To create an object:
From the setup page → Click on Object Manager → Click on Create → Click on Custom Object

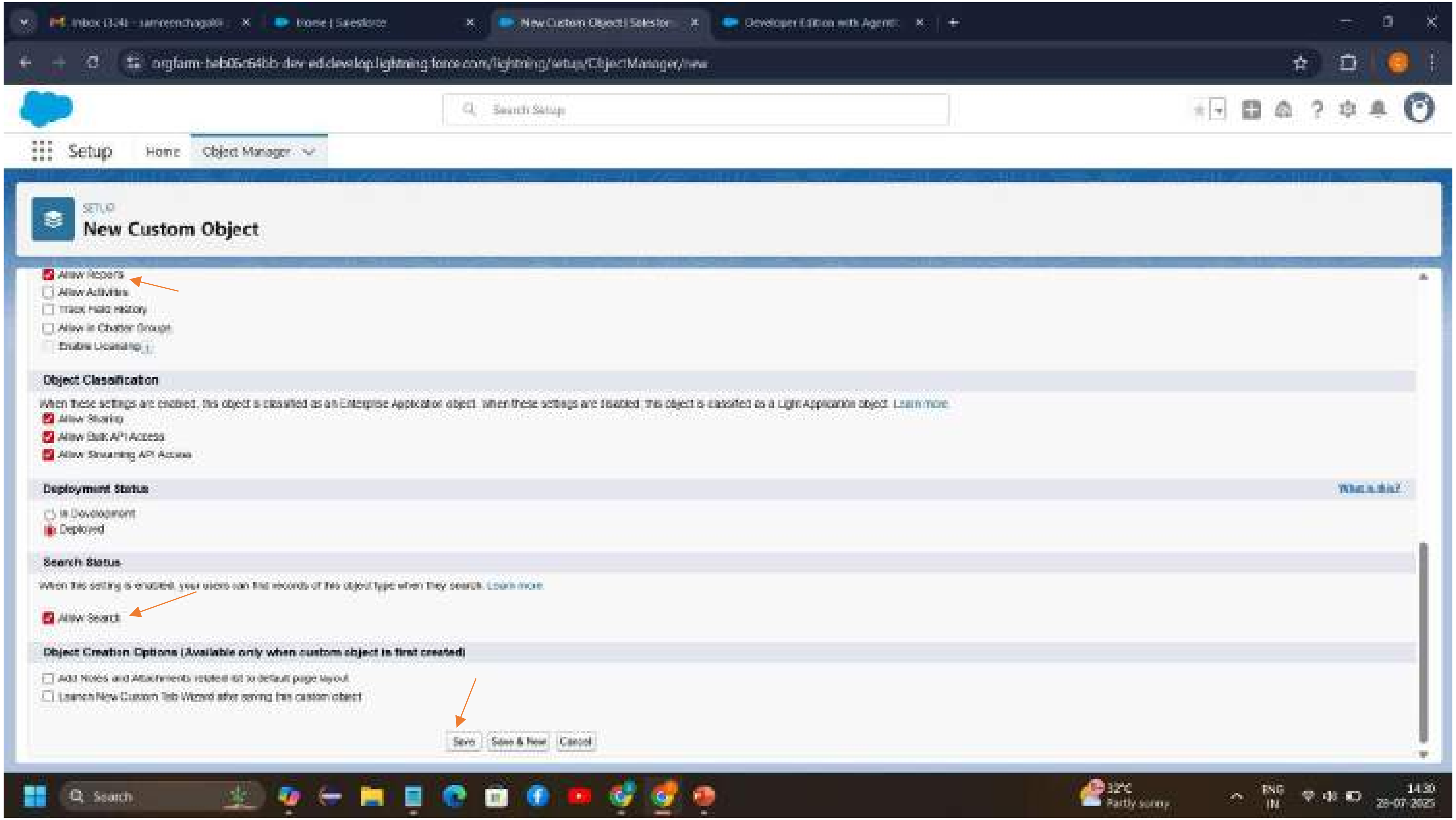


1.Enter the label name→ HandsMen Product
2.Plural label name→ HandsMen Products
3.Enter Record Name Label and Format
4.Record Name → HandsMen Product Name

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



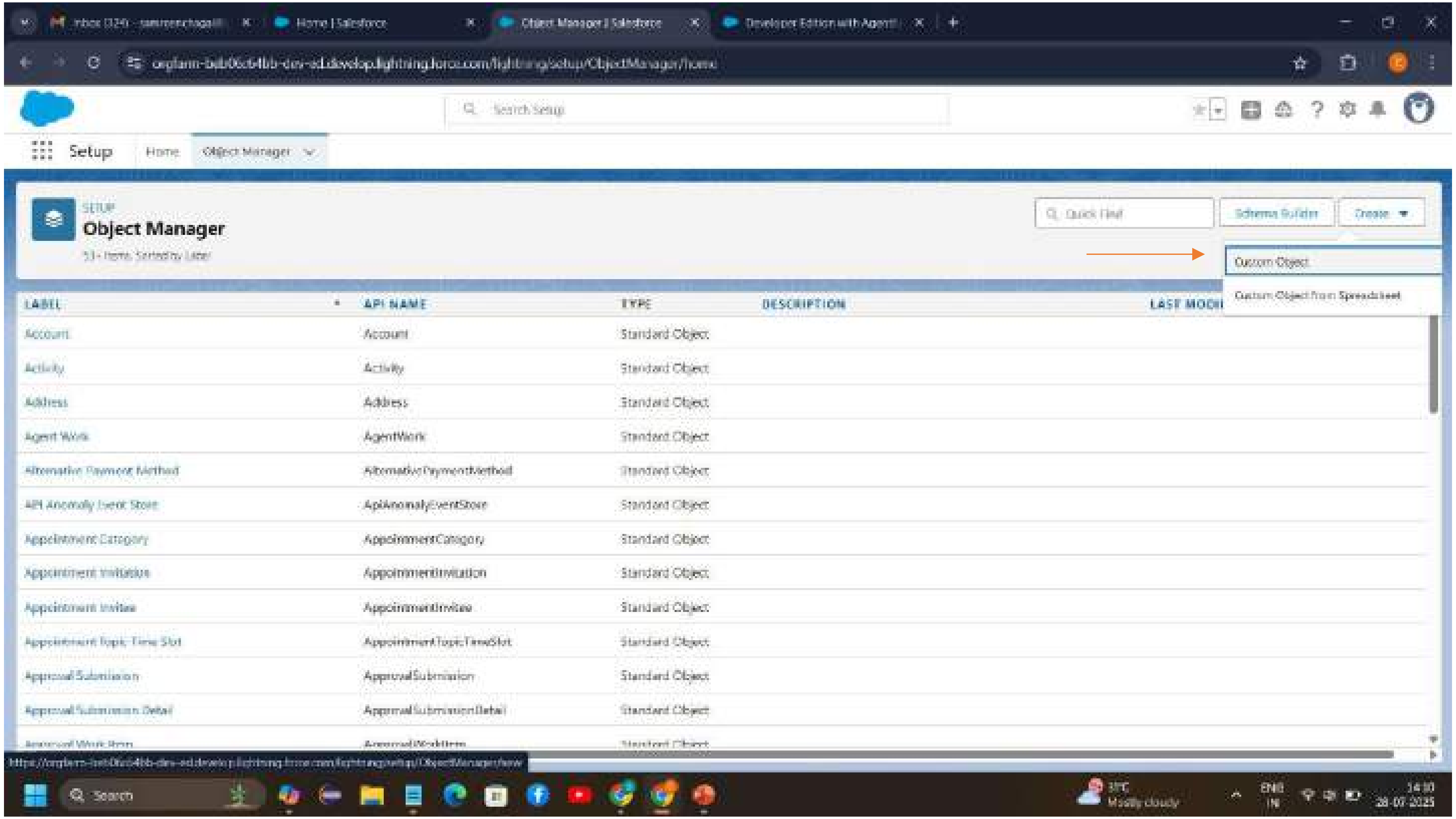
Click on Allow reports,
Allow search → **Save**



Create HandsMen Order Object

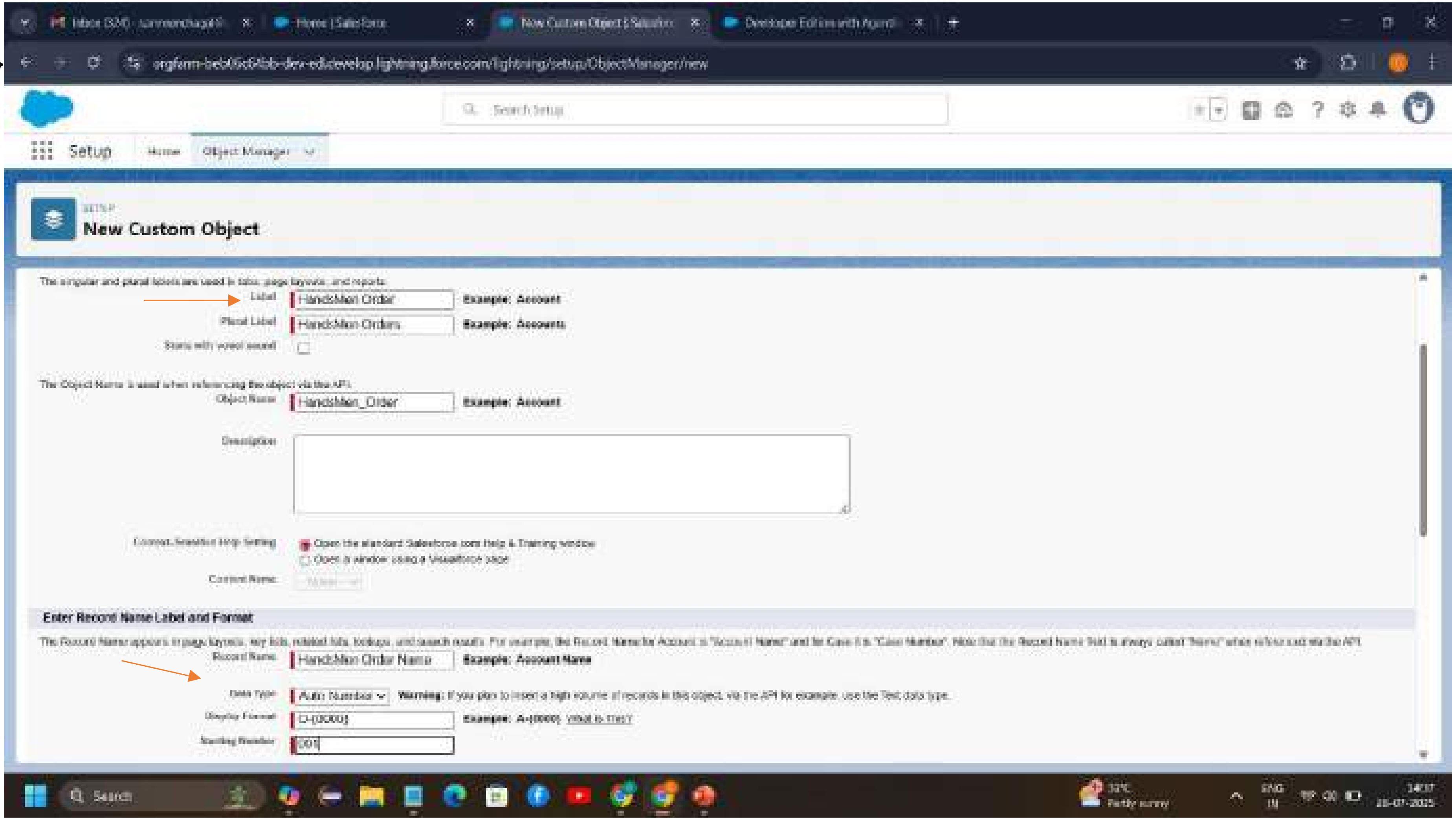
To create an object:
From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
Enter the label name→ HandsMen Order
Plural label name→ HandsMen Orders
Enter Record Name Label and Format
Record Name → HandsMen OrderNumber
Data Type → Auto Number
Display Format → O-{0000}
Starting Number → 001
Click on Allow reports,
Allow search → **Save**

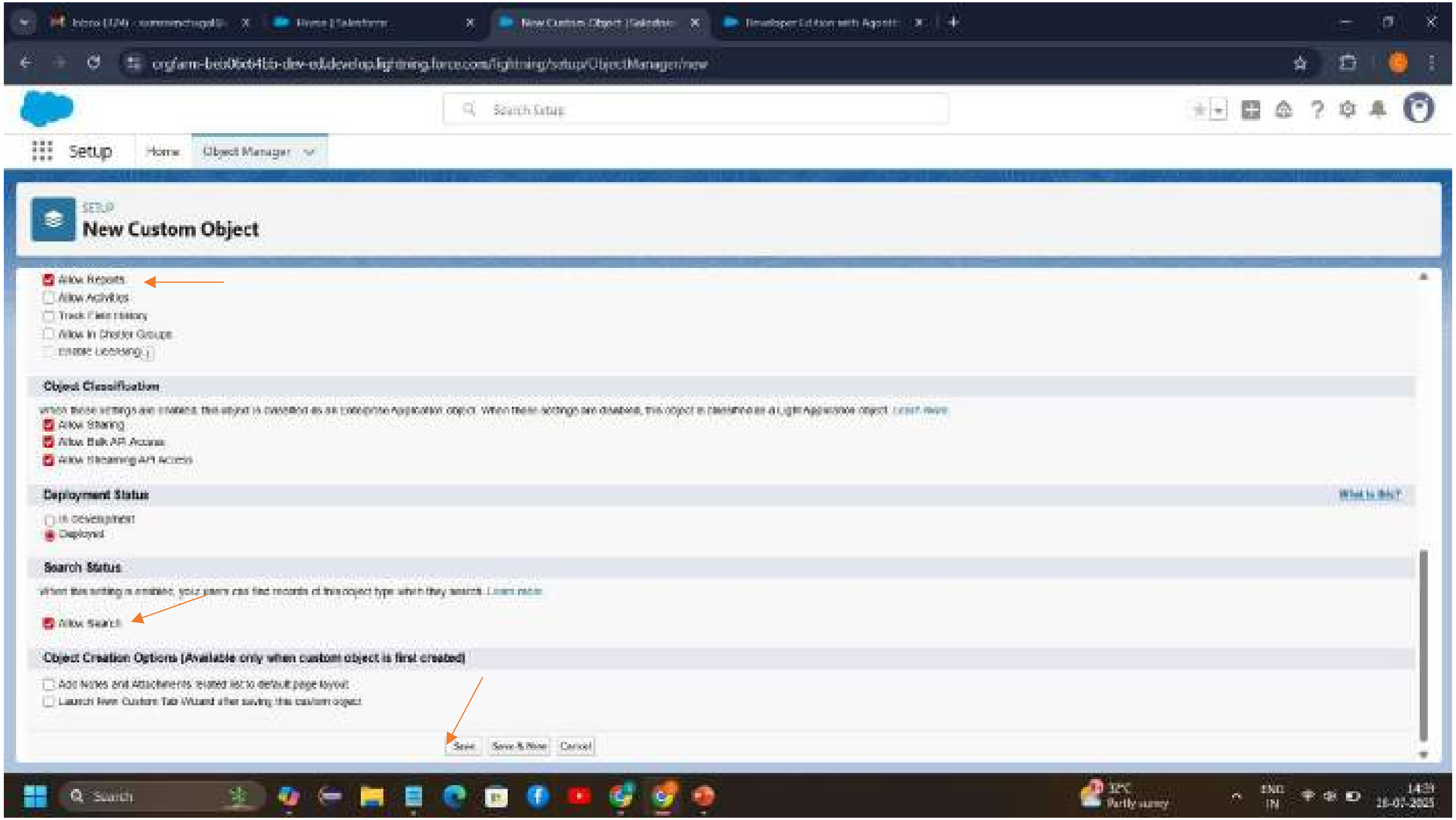
From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



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

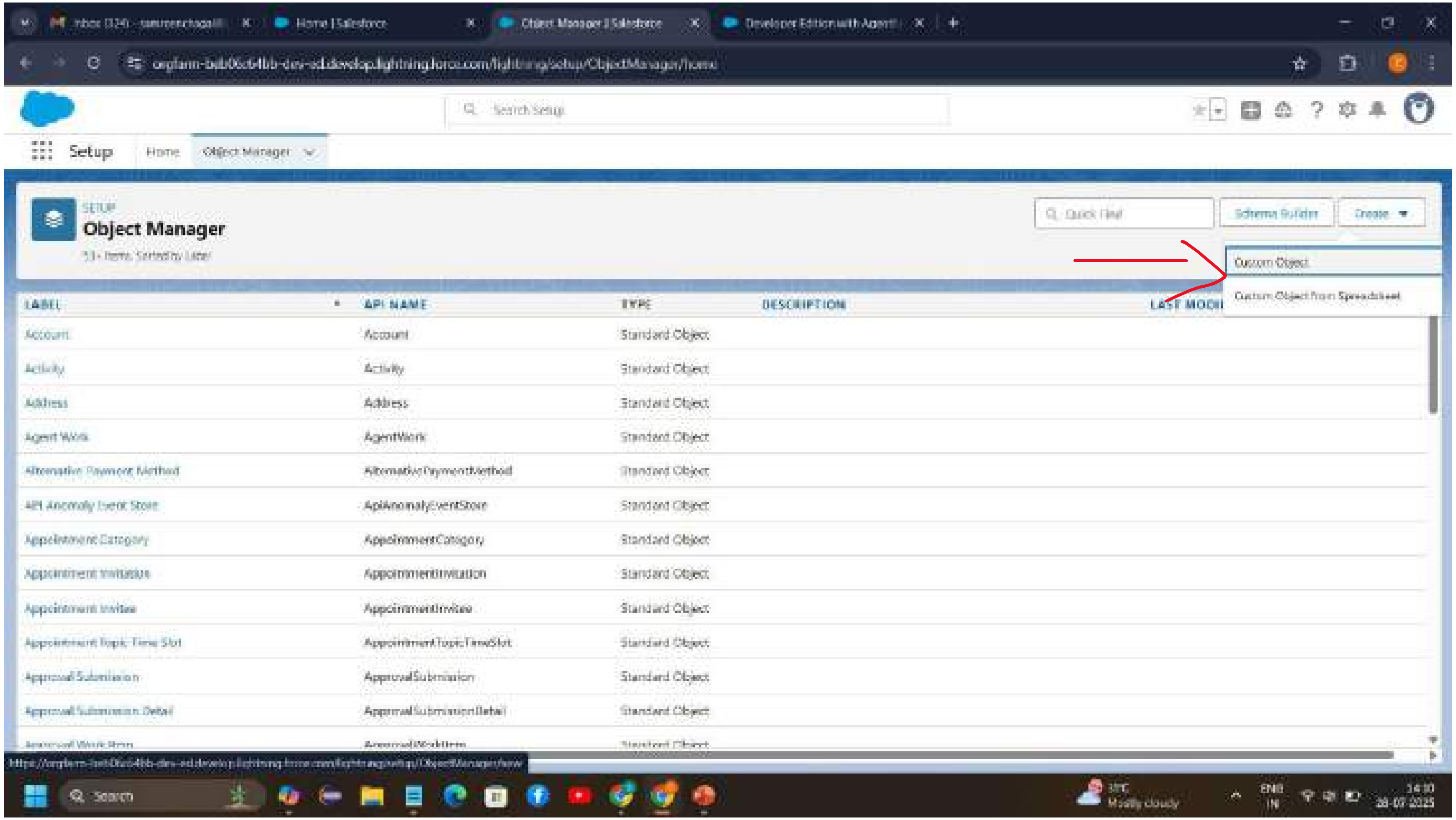
- Data Type → Auto Number
- Display Format → O-{0000}
- Starting Number → 001



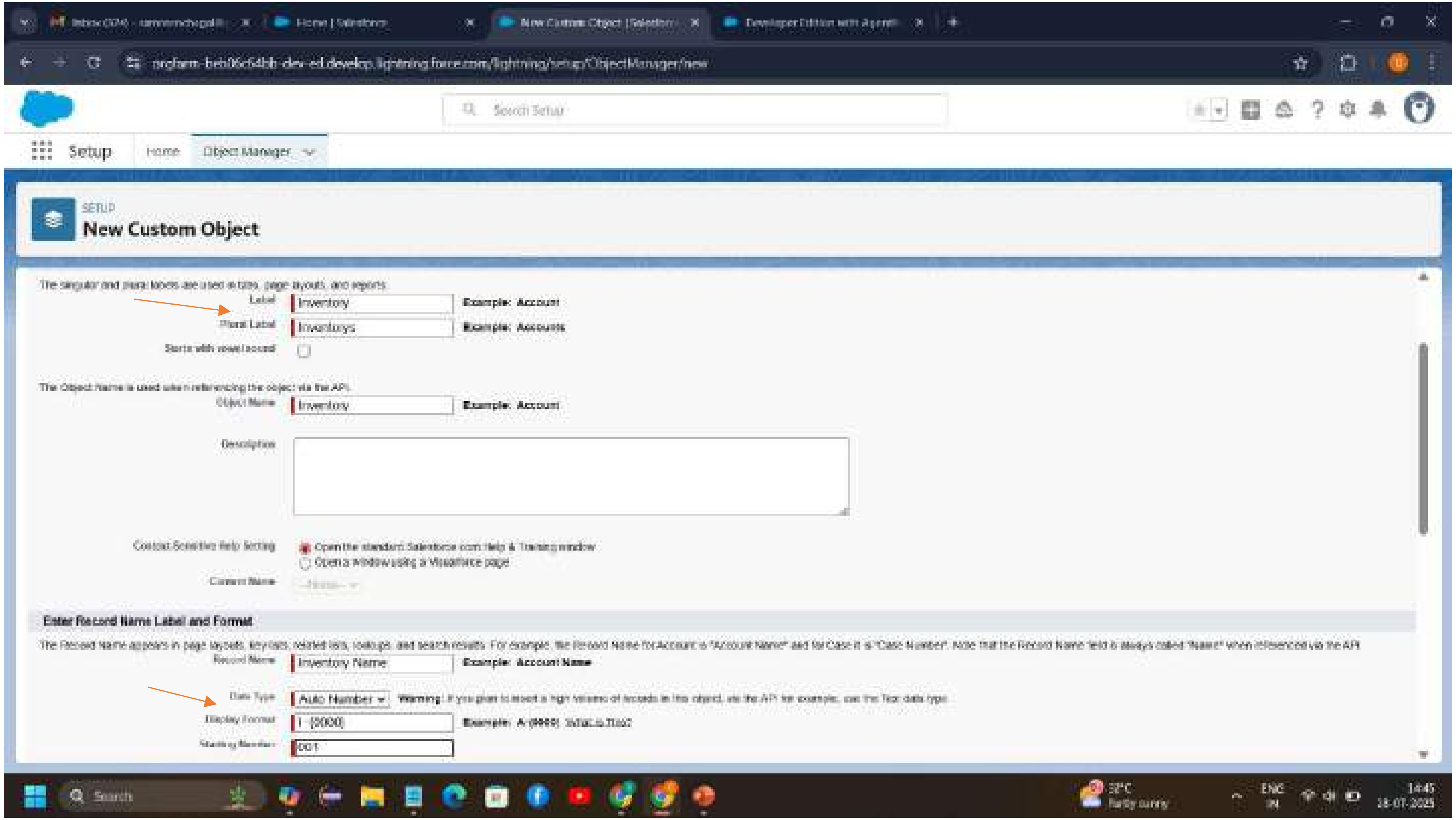

New Custom Object | Salesforce
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
Allow Reports
Allow Activities
Track Field History
Allow in Chatter Groups
Enable Licensing
Object Classification
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
What is this?
In Development
Deployed
Search Status
Allow Search
Object Creation Options (Available only when custom object is first created)
Add Notes and Attachments related list to default page layout
Launch New Custom Tab Wizard after saving this custom object
Save
Save & New
Cancel

Create Inventory Object

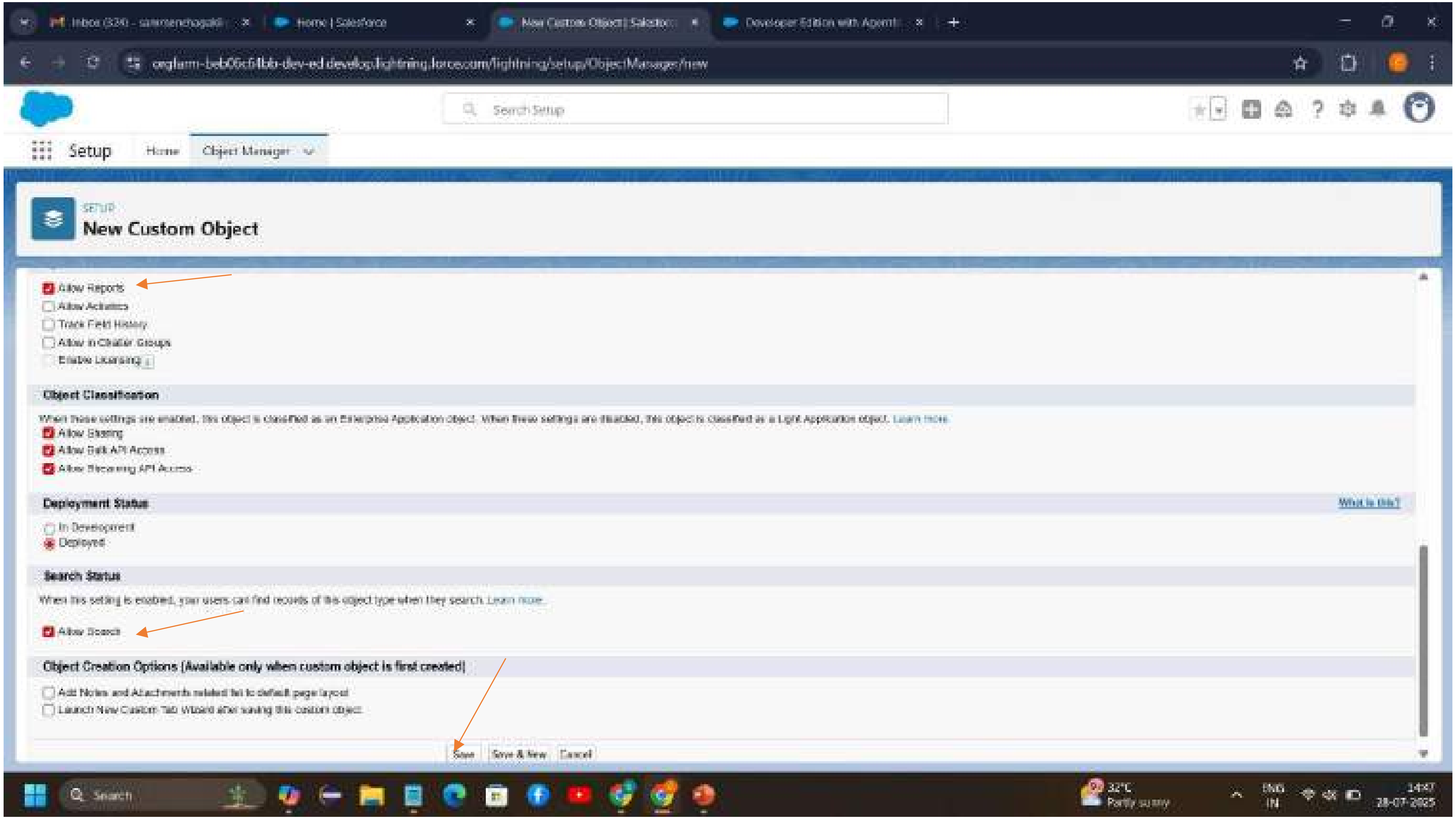
To create an object:
From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



Enter the label name→ Inventory
Plural label name→ Inventorys
Enter Record Name Label and Format
Record Name → Inventory Number
Data Type → Auto Number
Display Format → I -{0000}
Starting Number → 001



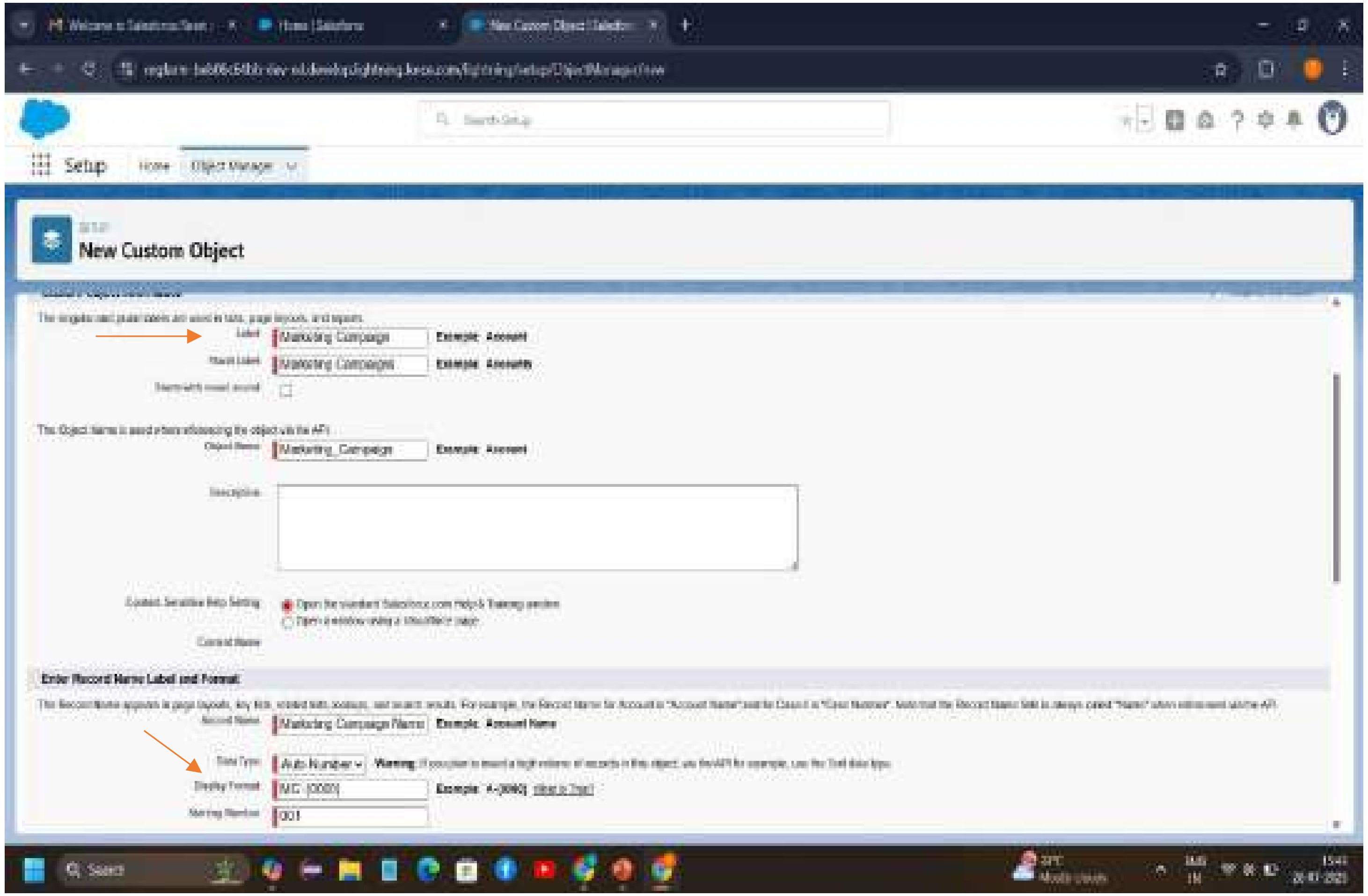
Click on Allow reports,
Allow search → **Save**



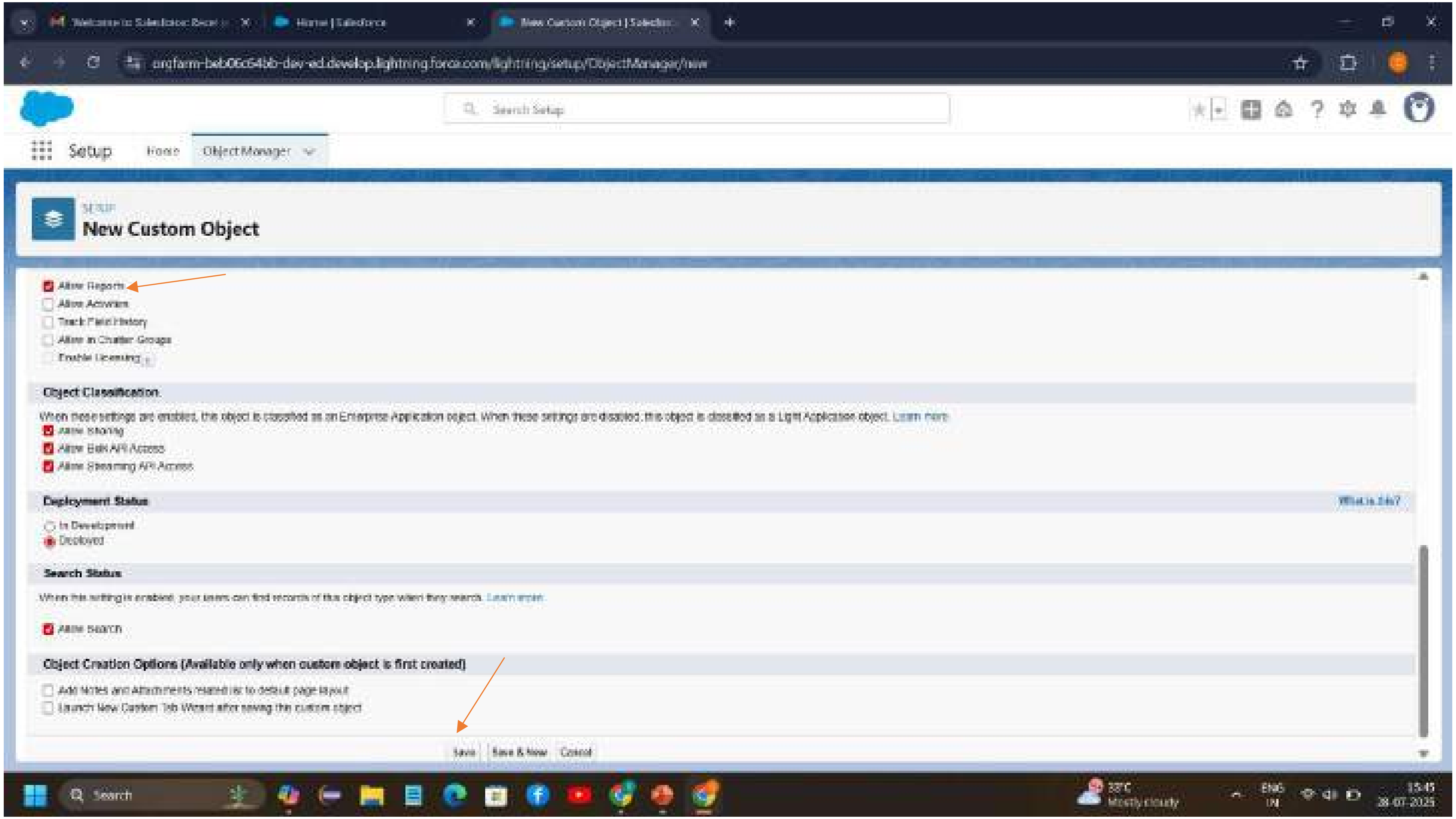
Object - Marketing Campaign

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



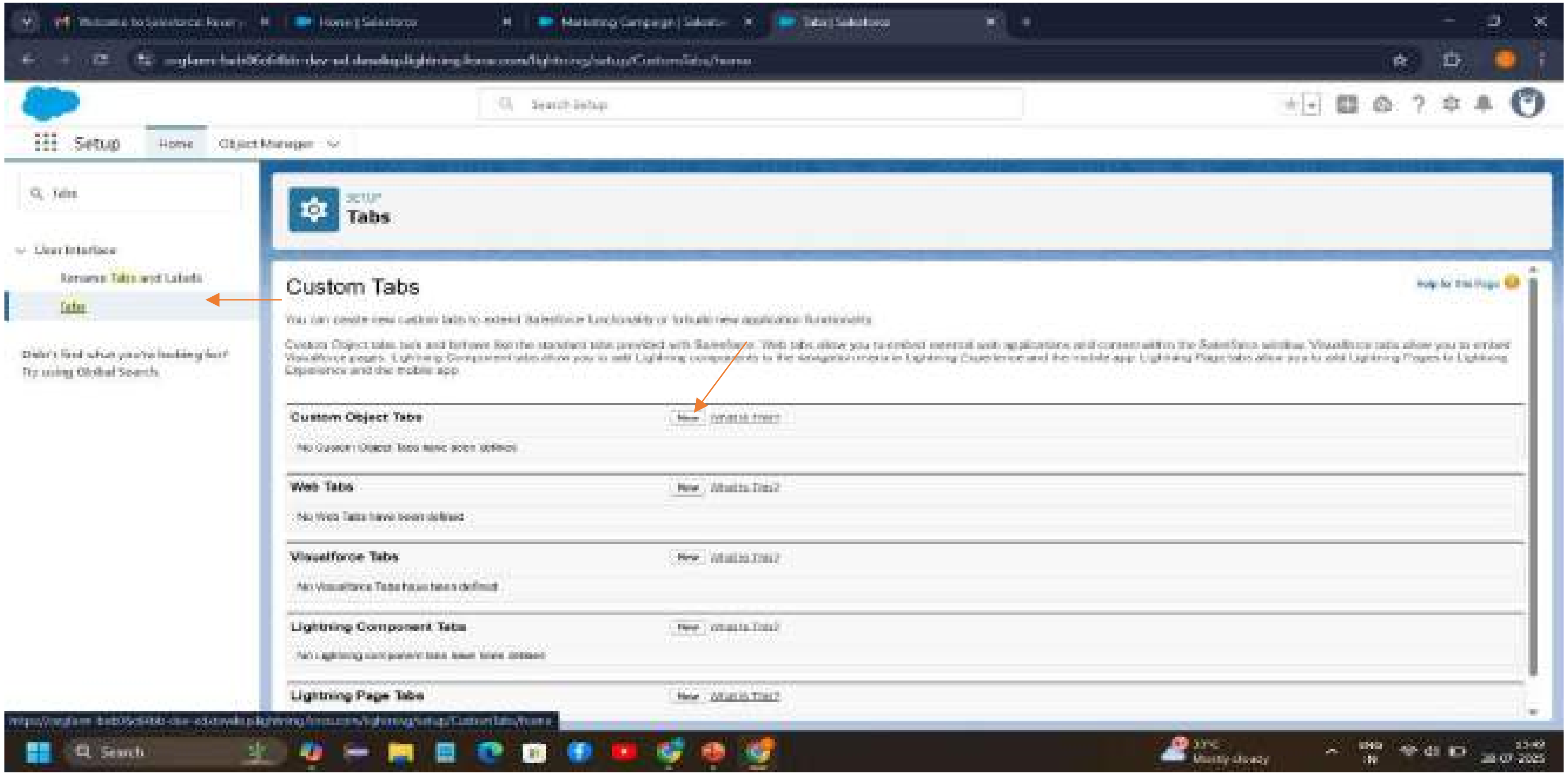
Click on Allow reports,
Allow search → **Save**



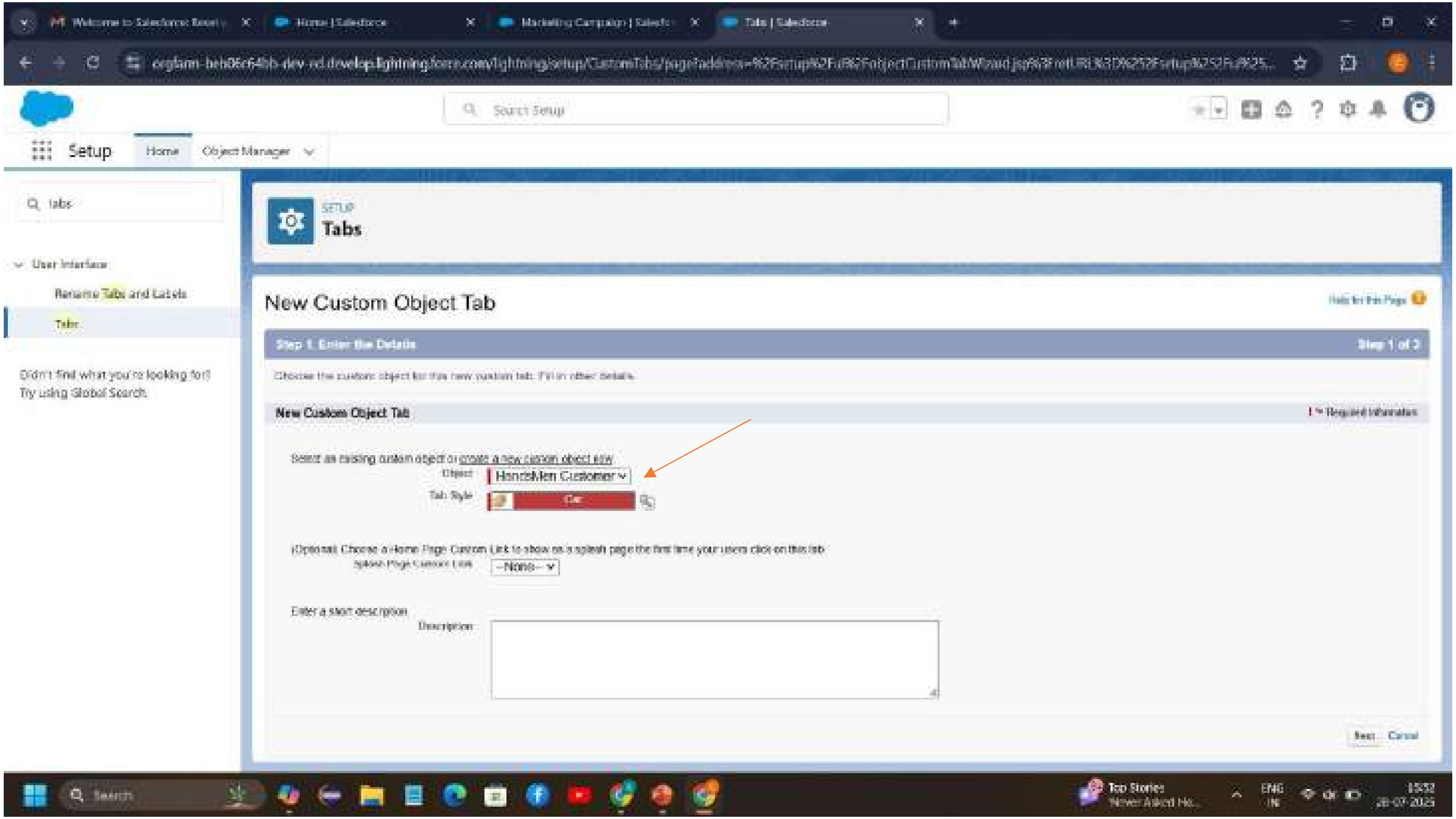
Data Management - Tabs

Creating a Custom Tab(HandsMen Customer)

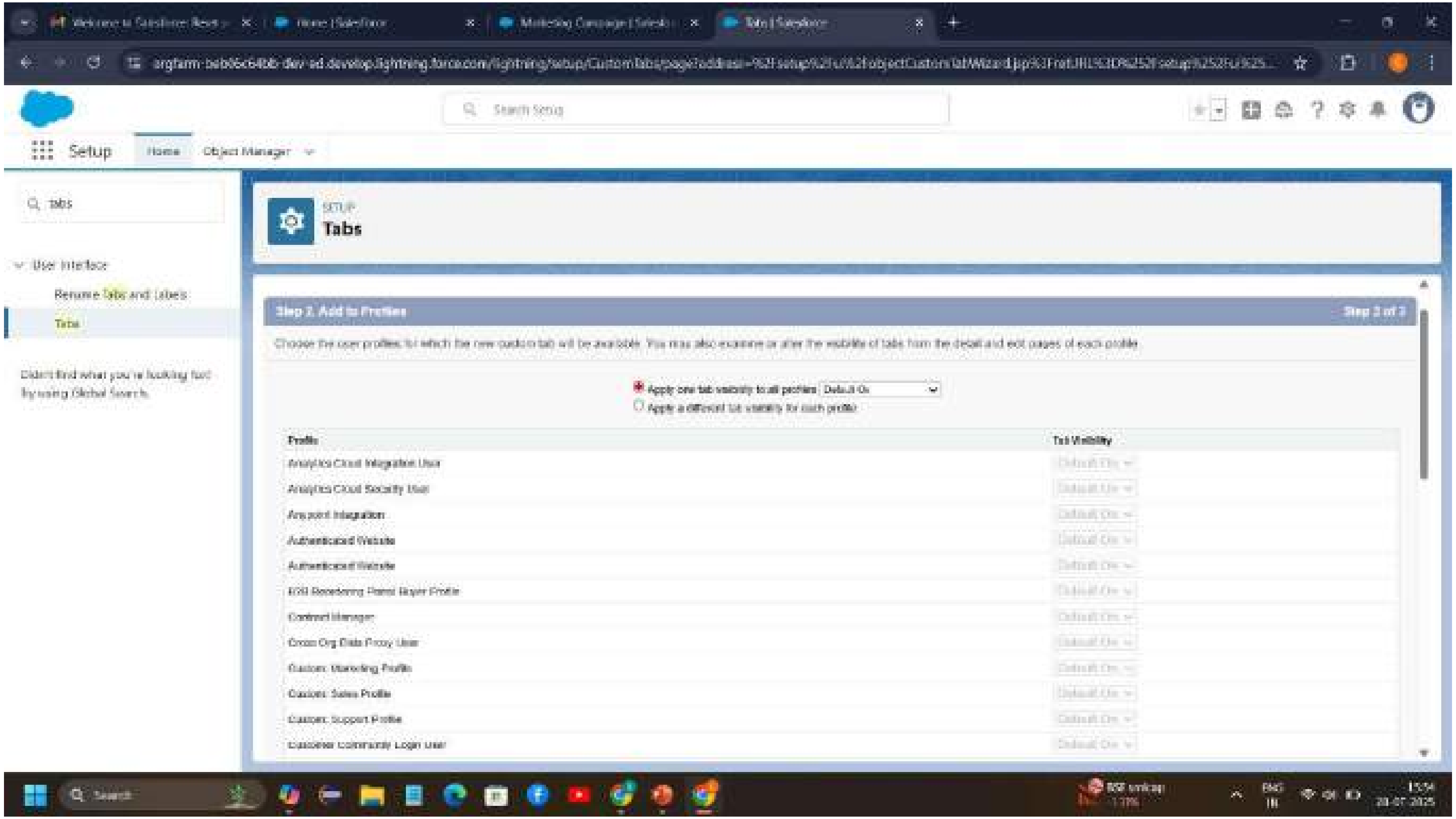
To create a Tab(HandsMen Customer)
Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)



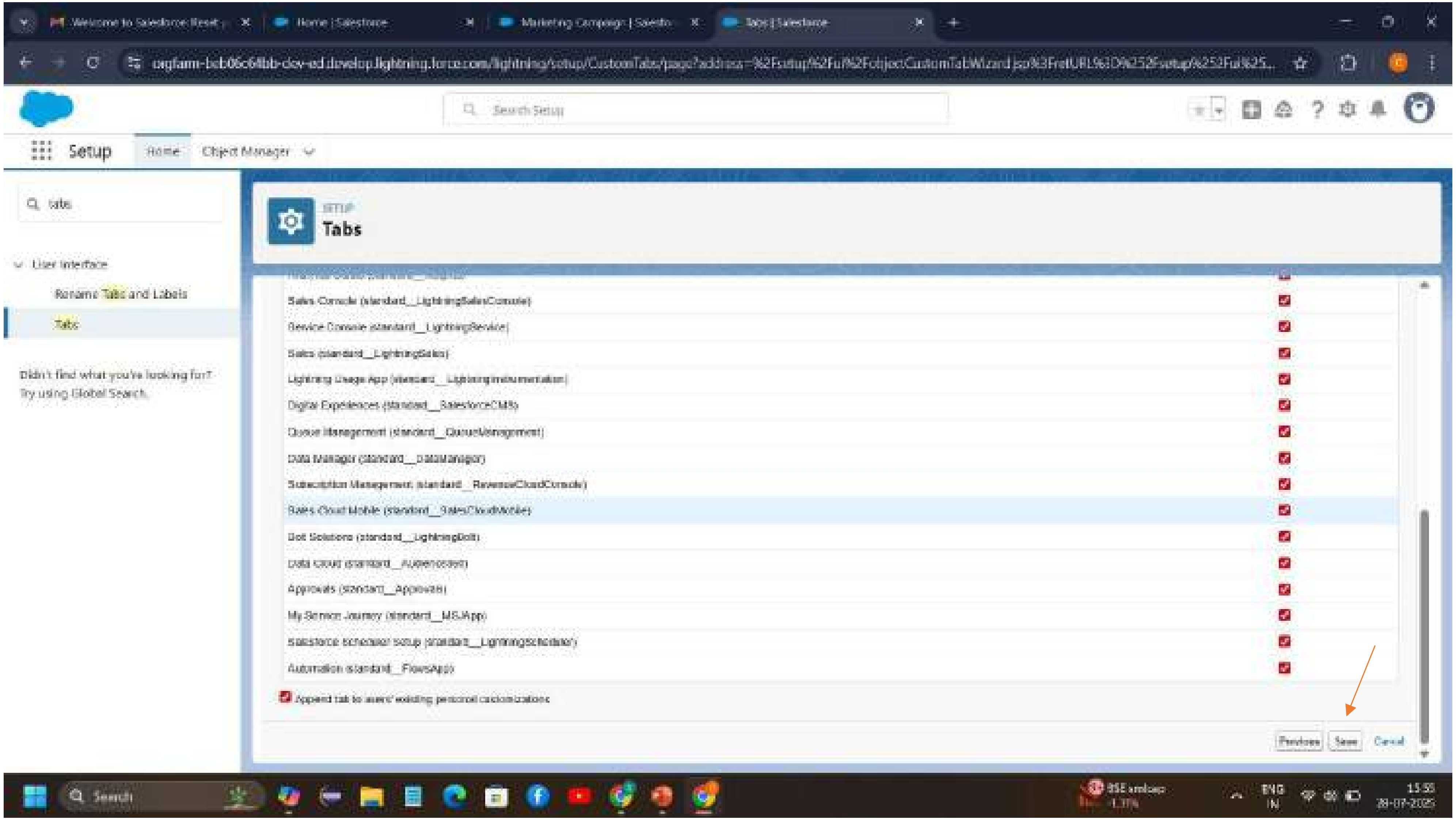
Select Object(HandsMen Customer) → Select any tab style



Next (Add to profiles page) keep it as default



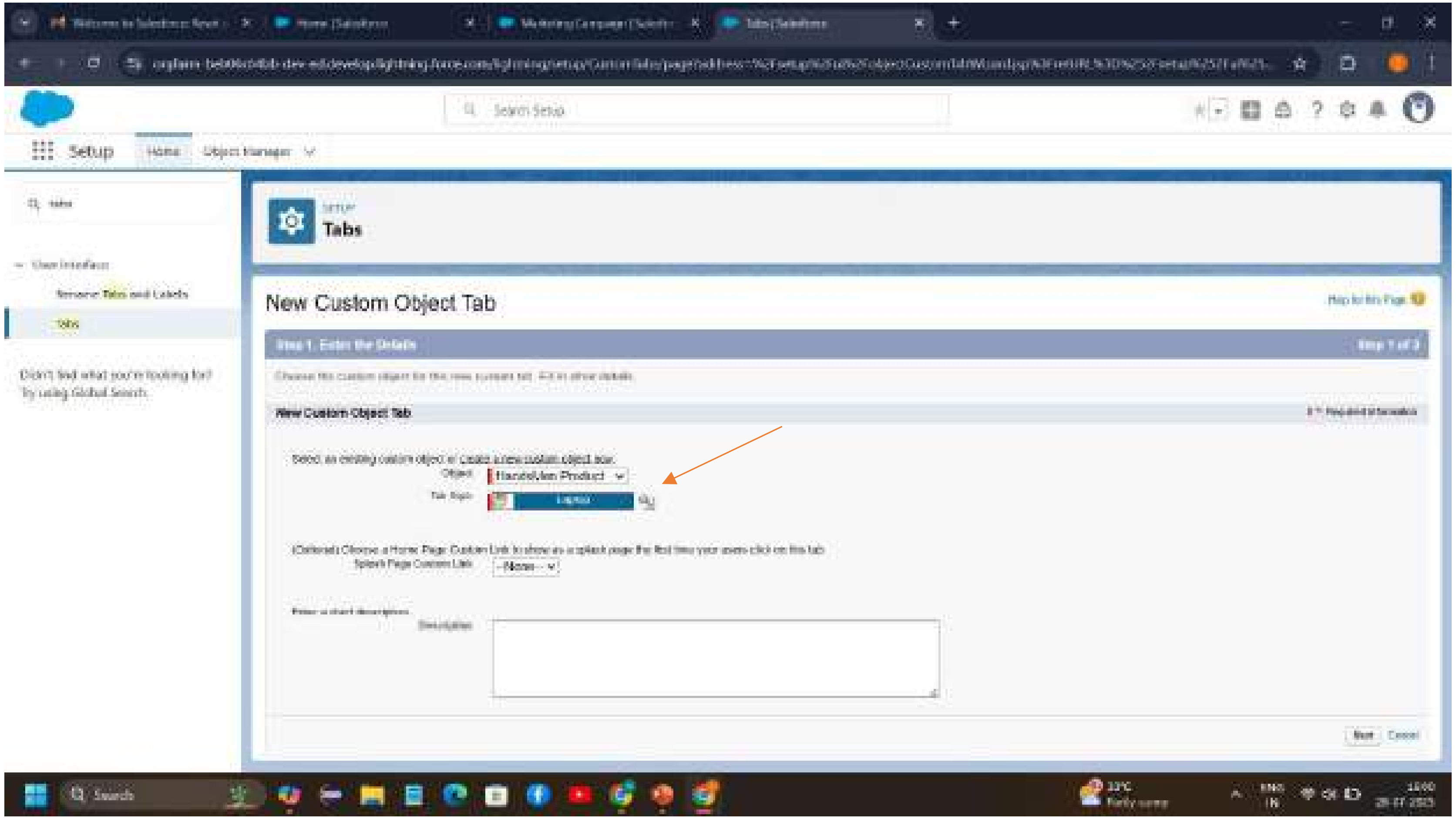
Next (Add to Custom App) keep it as default → Save.



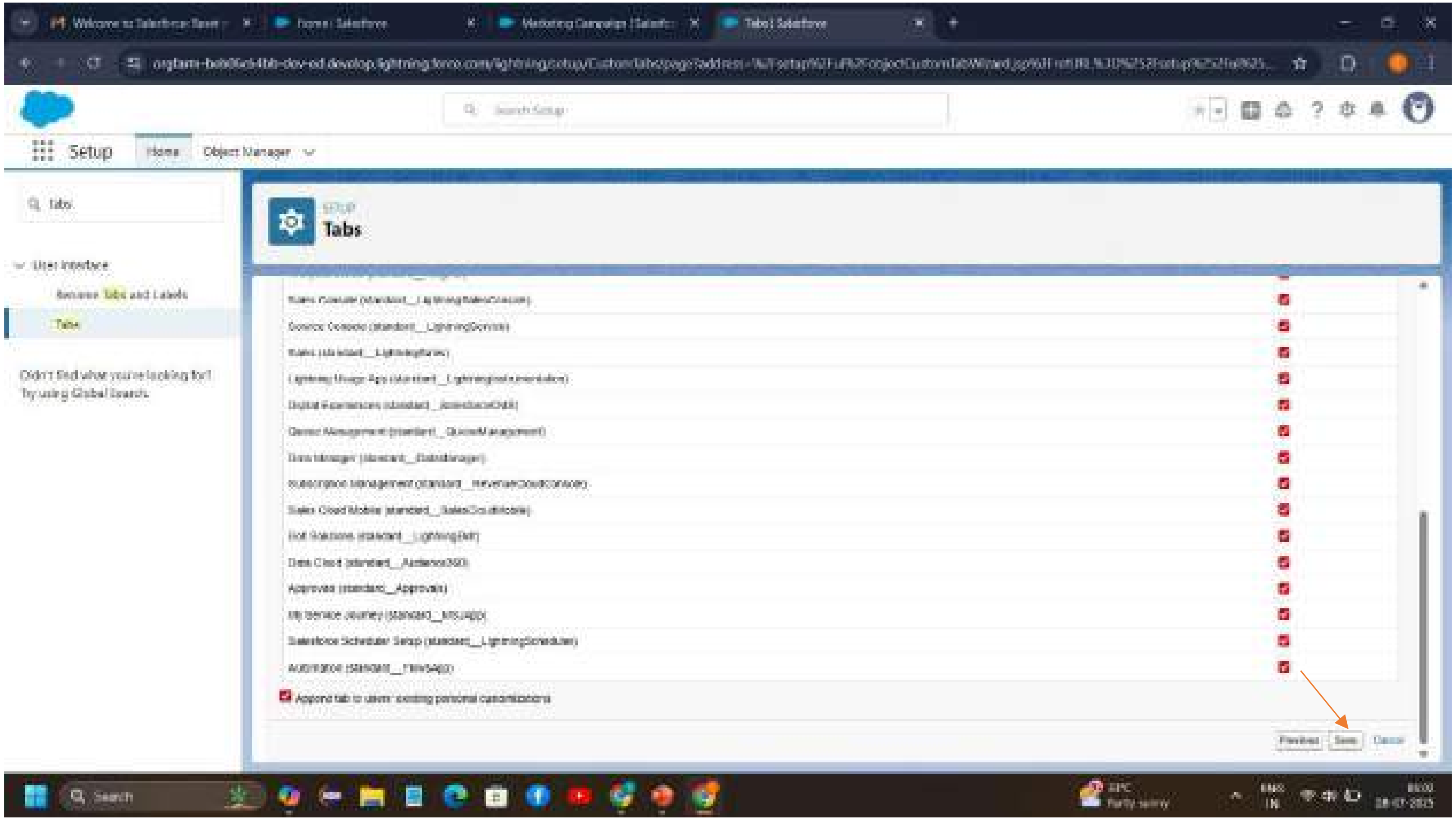
Create Tabs

Create Tab for Object - HandsMen Product

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



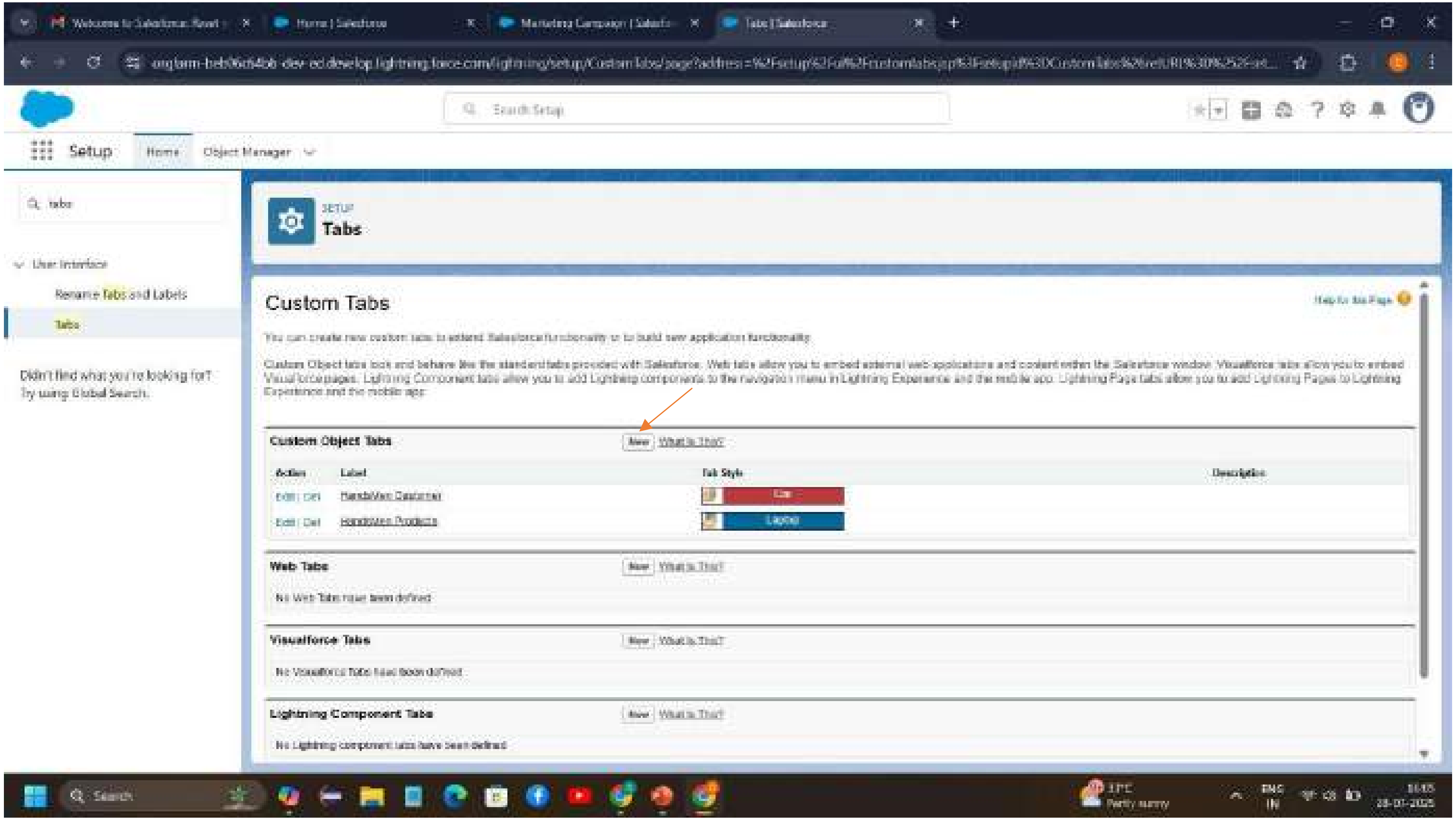
Select Object(HandsMen Product) → Select any tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) keep it as default → Save.



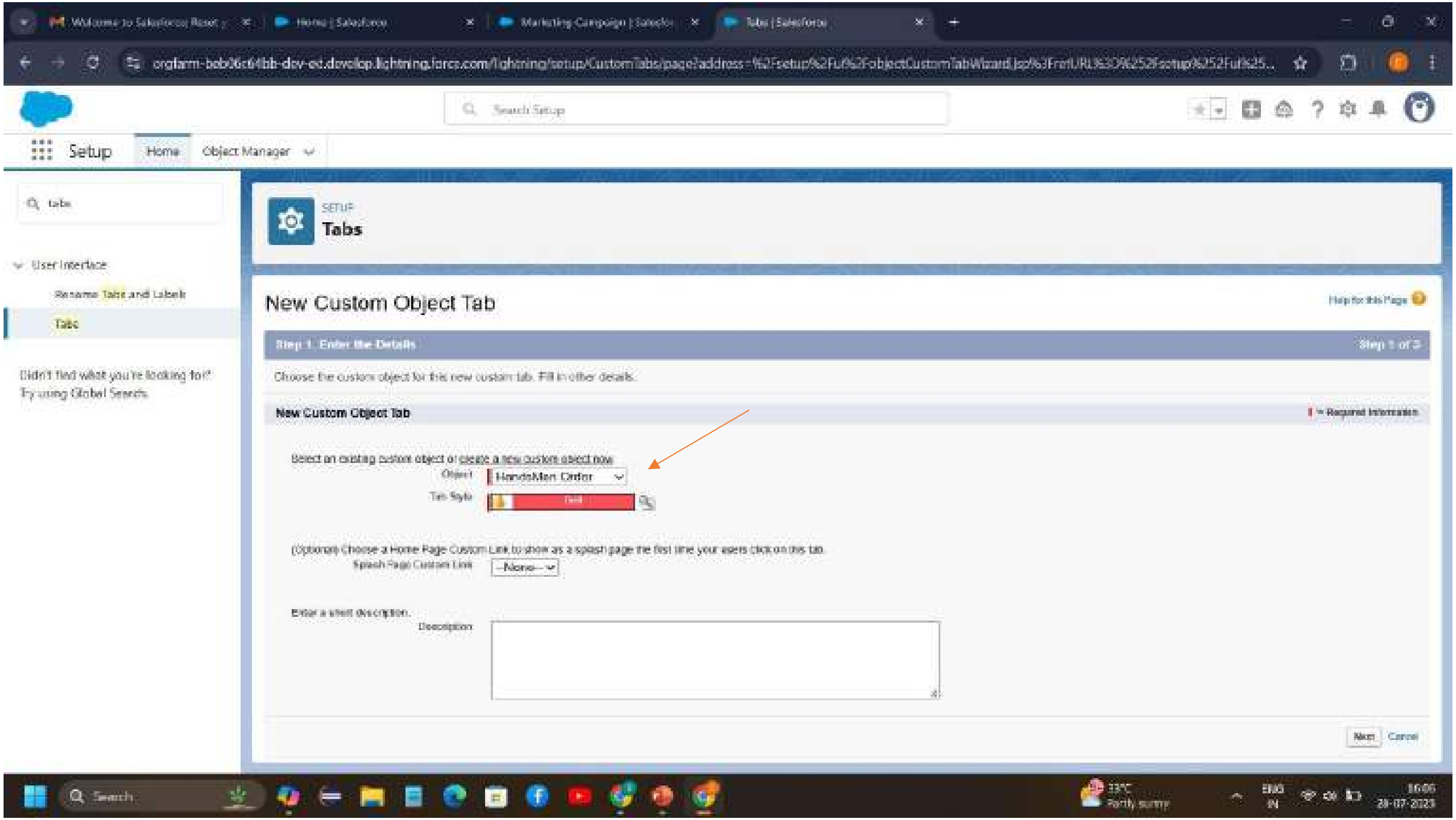
Creating a Custom Tab(HandsMen Order)

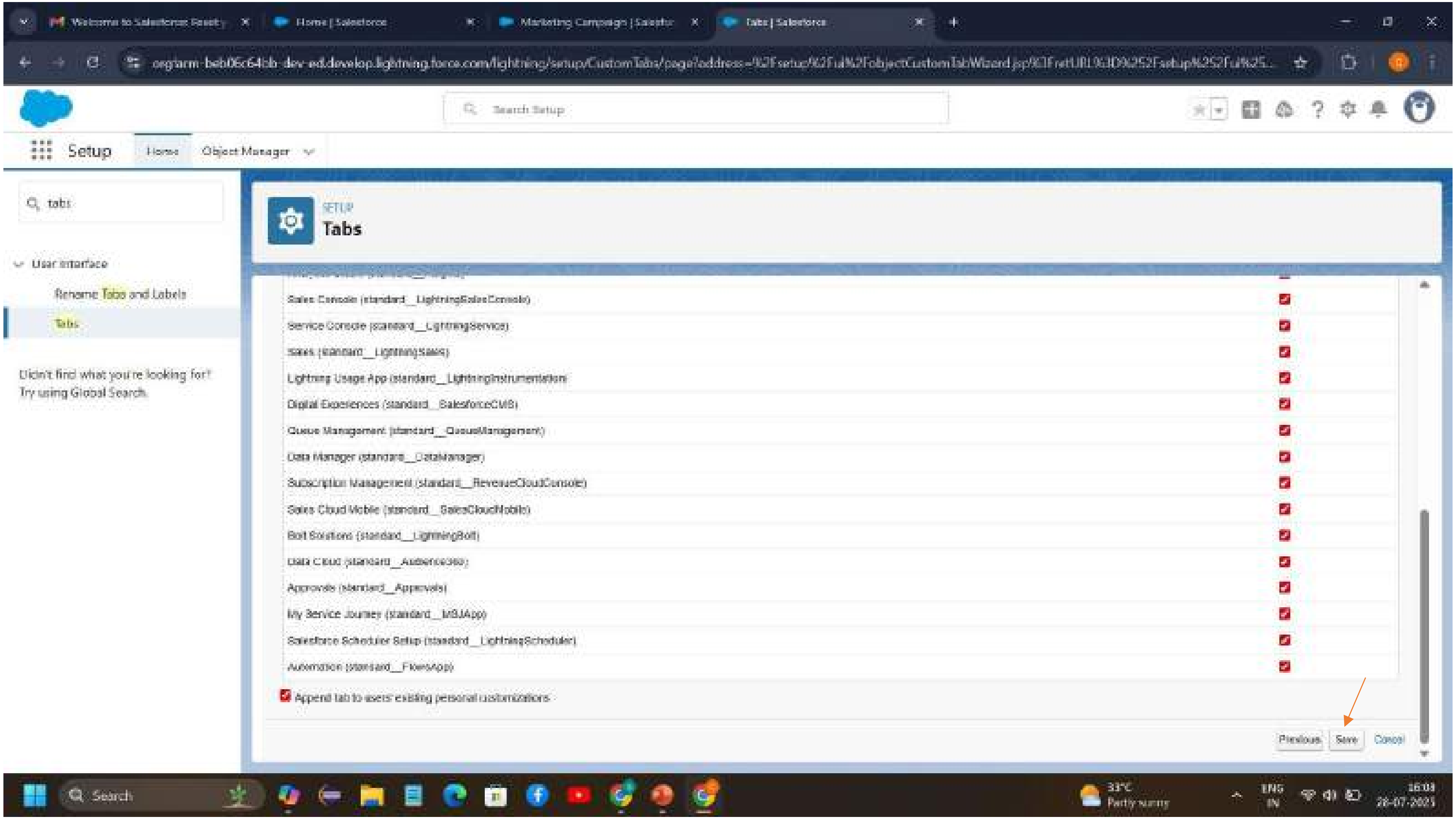
To create a Tab(HandsMen Order)

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



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.

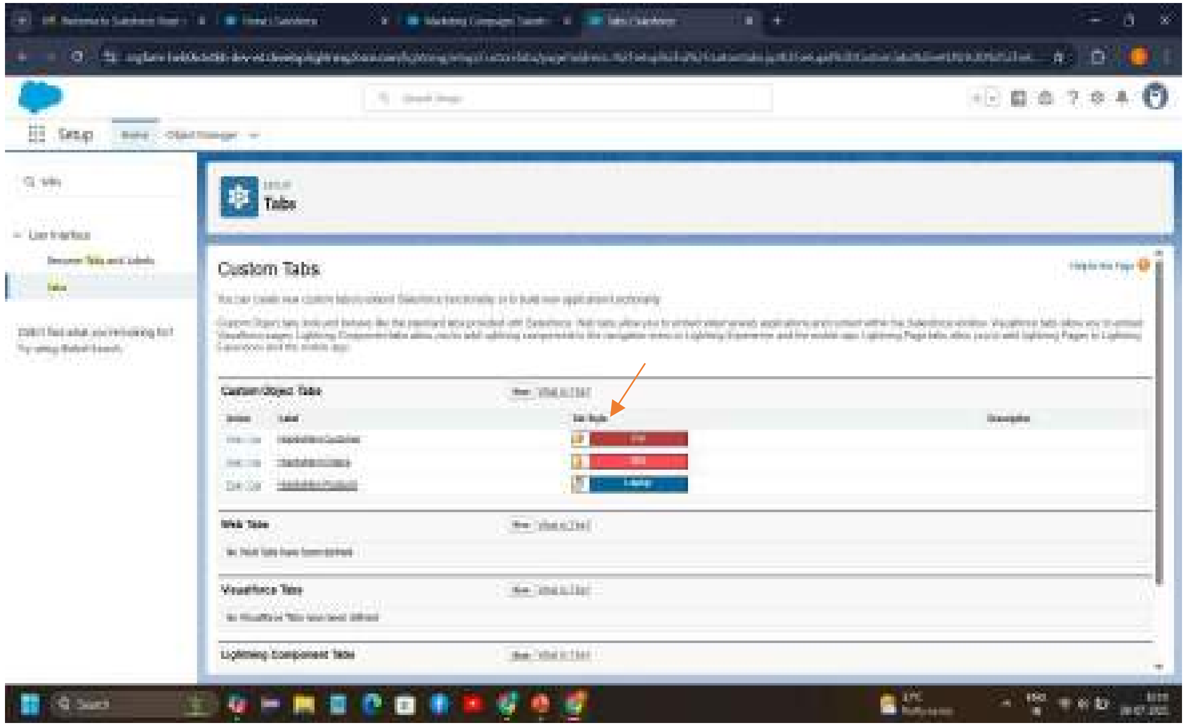


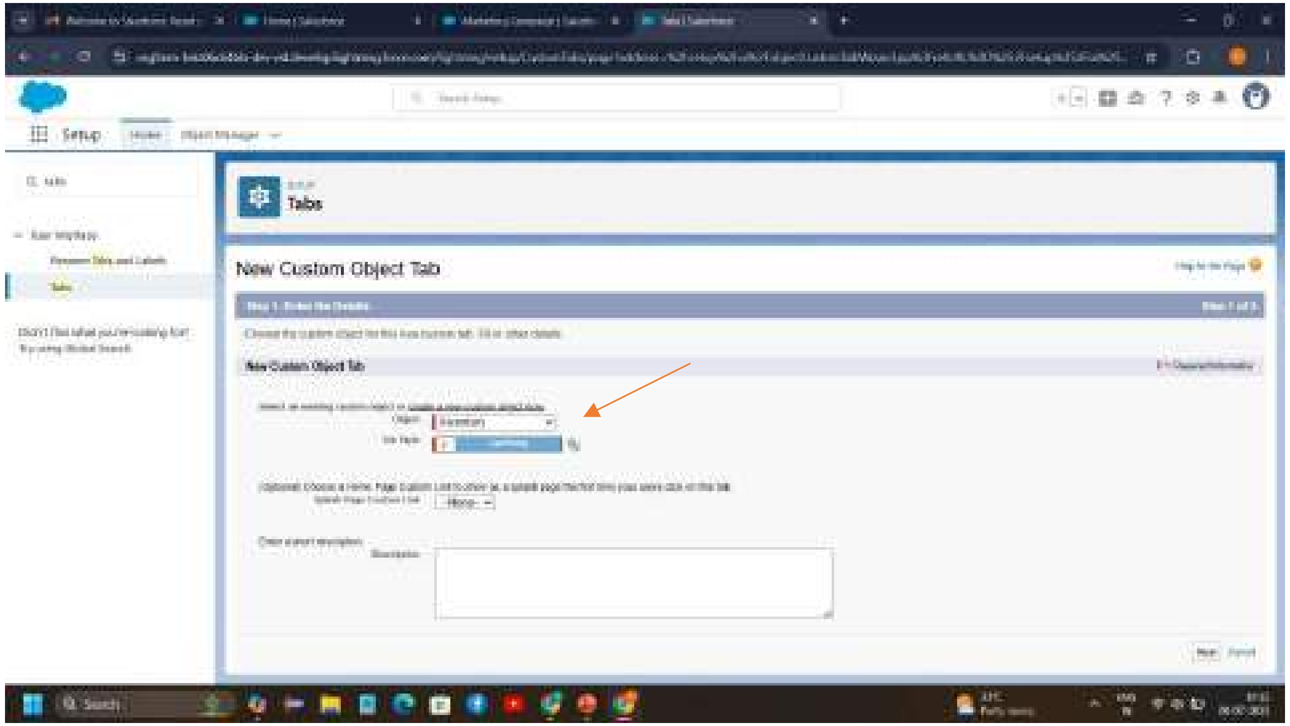

Search Setup
Setup
Home
Object Manager
tabs
SETUP
Tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
Sales Console (standard__LightningSalesConsole)
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Lightning Usage App (standard__LightningInstrumentation)
Digital Experiences (standard__SalesforceCMS)
Queue Management (standard__QueueManagement)
Data Manager (standard__DataManager)
Subscription Management (standard__RevenueCloudConsole)
Sales Cloud Mobile (standard__SalesCloudMobile)
Bolt Solutions (standard__LightningBolt)
Data Cloud (standard__Audience360)
Approvals (standard__Approvals)
My Service Journey (standard__MSJApp)
Salesforce Scheduler Setup (standard__LightningScheduler)
Automation (standard__FlowsApp)
Append tab to users' existing personal customizations
Previous
Save
Cancel

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.



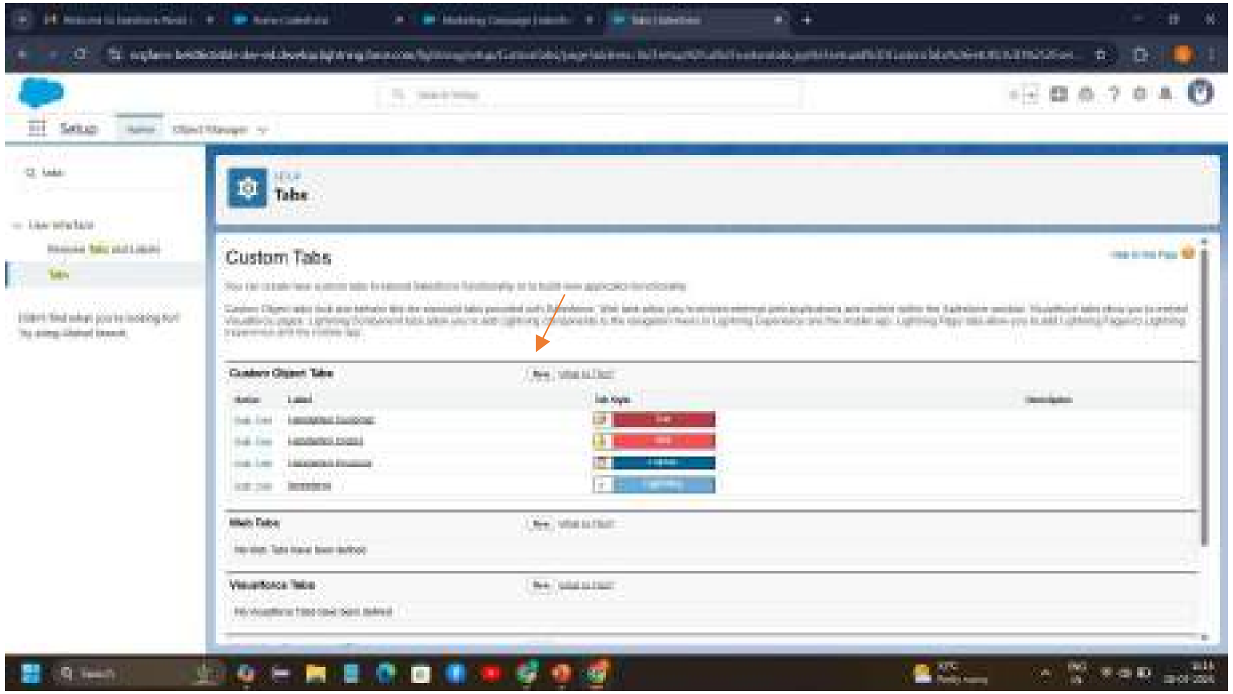


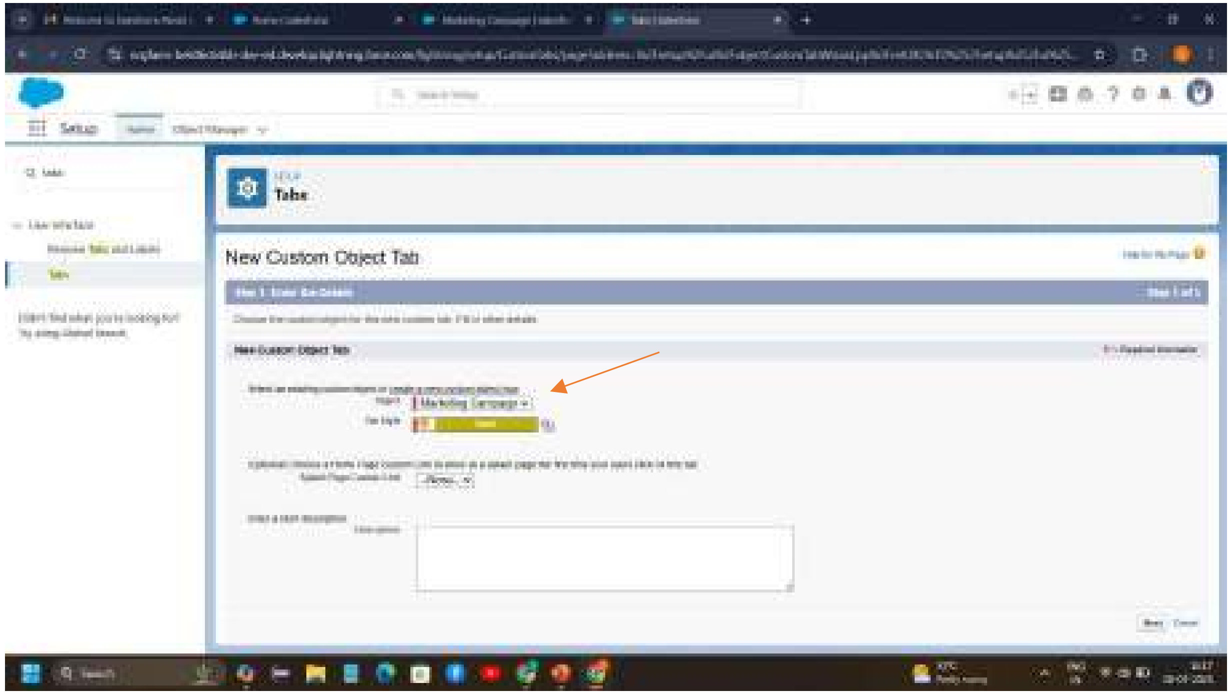
Creating a Custom Tab(Marketing Campaign)

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.



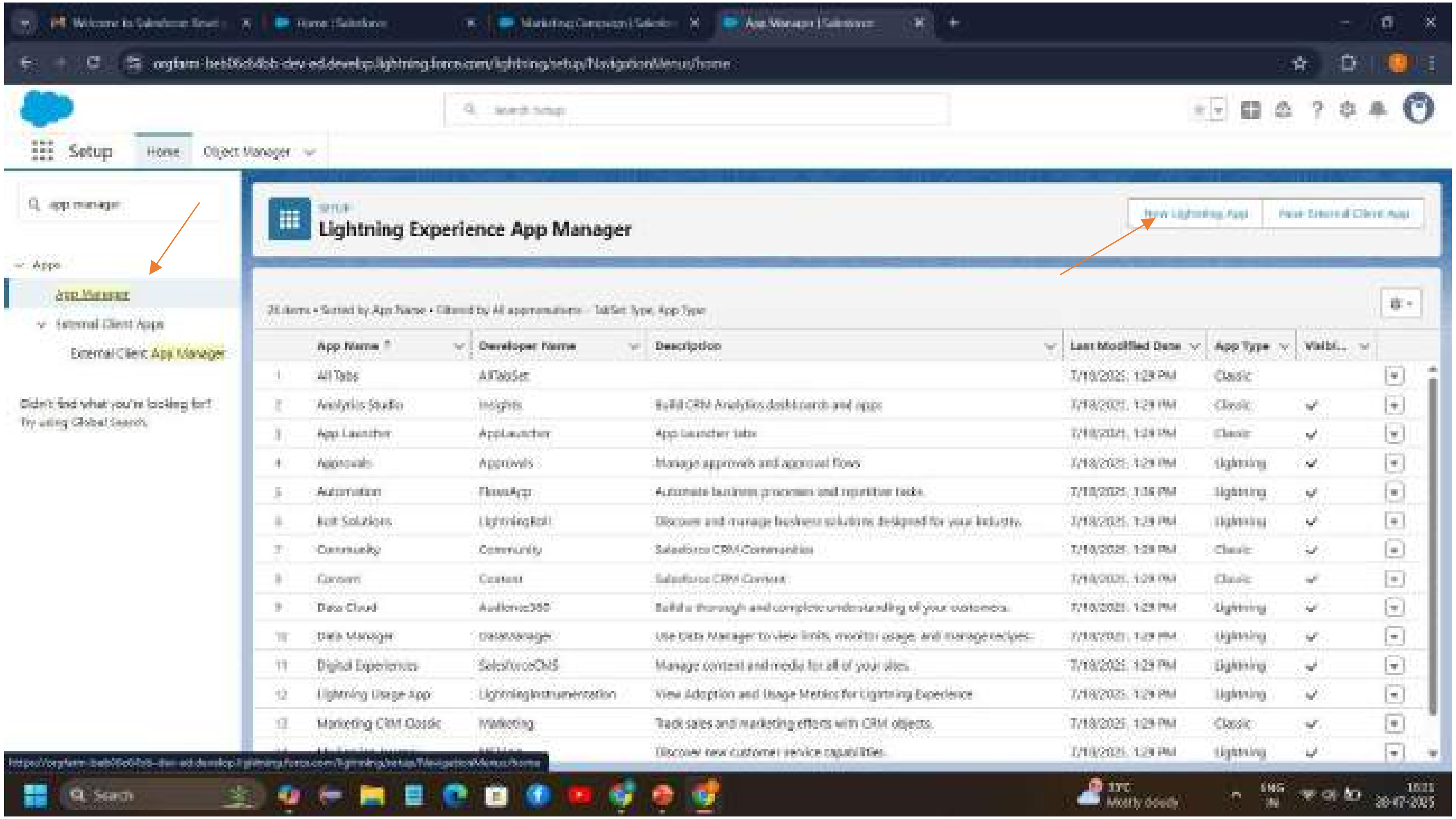


Data Management - App Manager

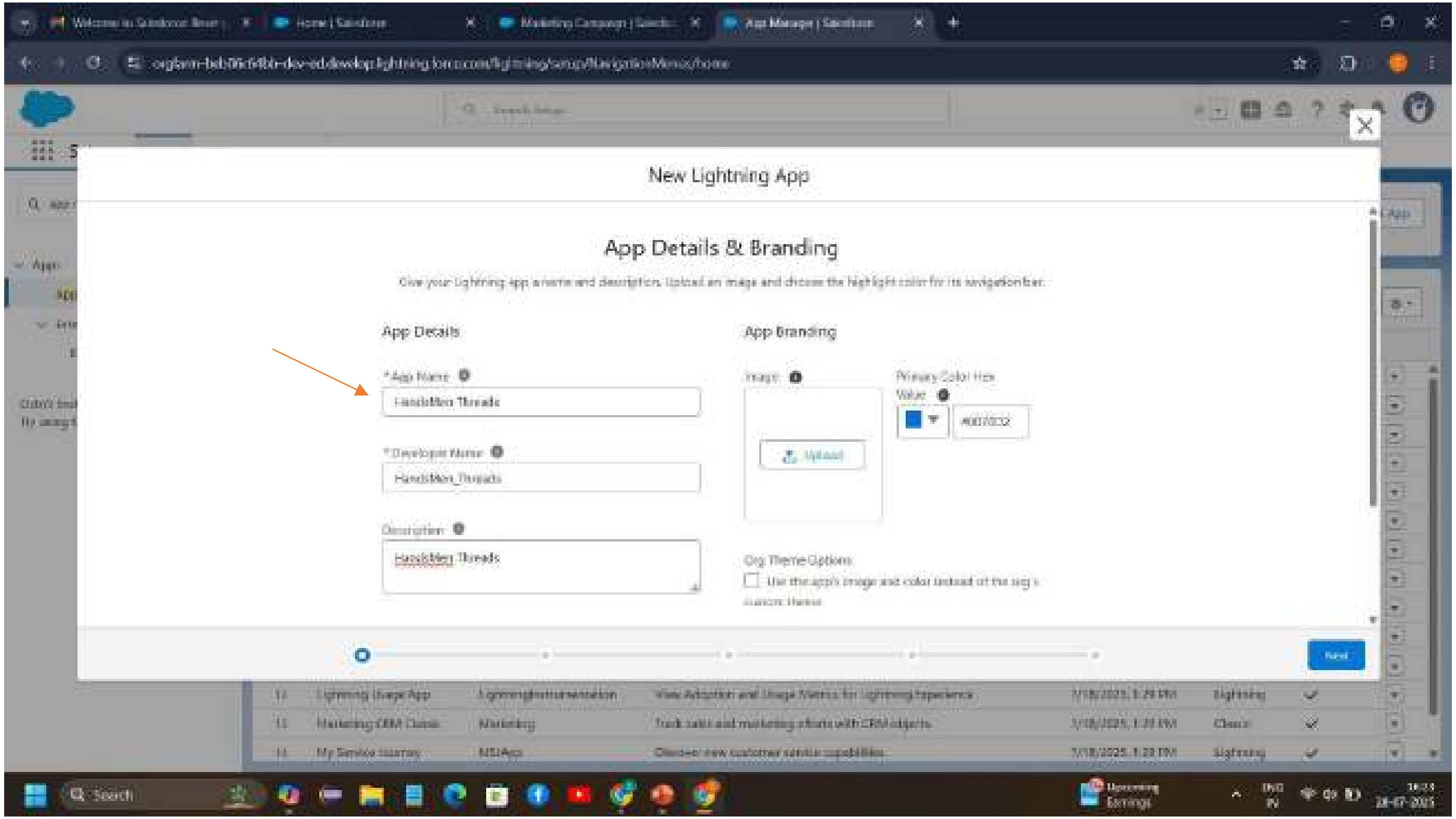
Create a Lightning App

To create a lightning app page:

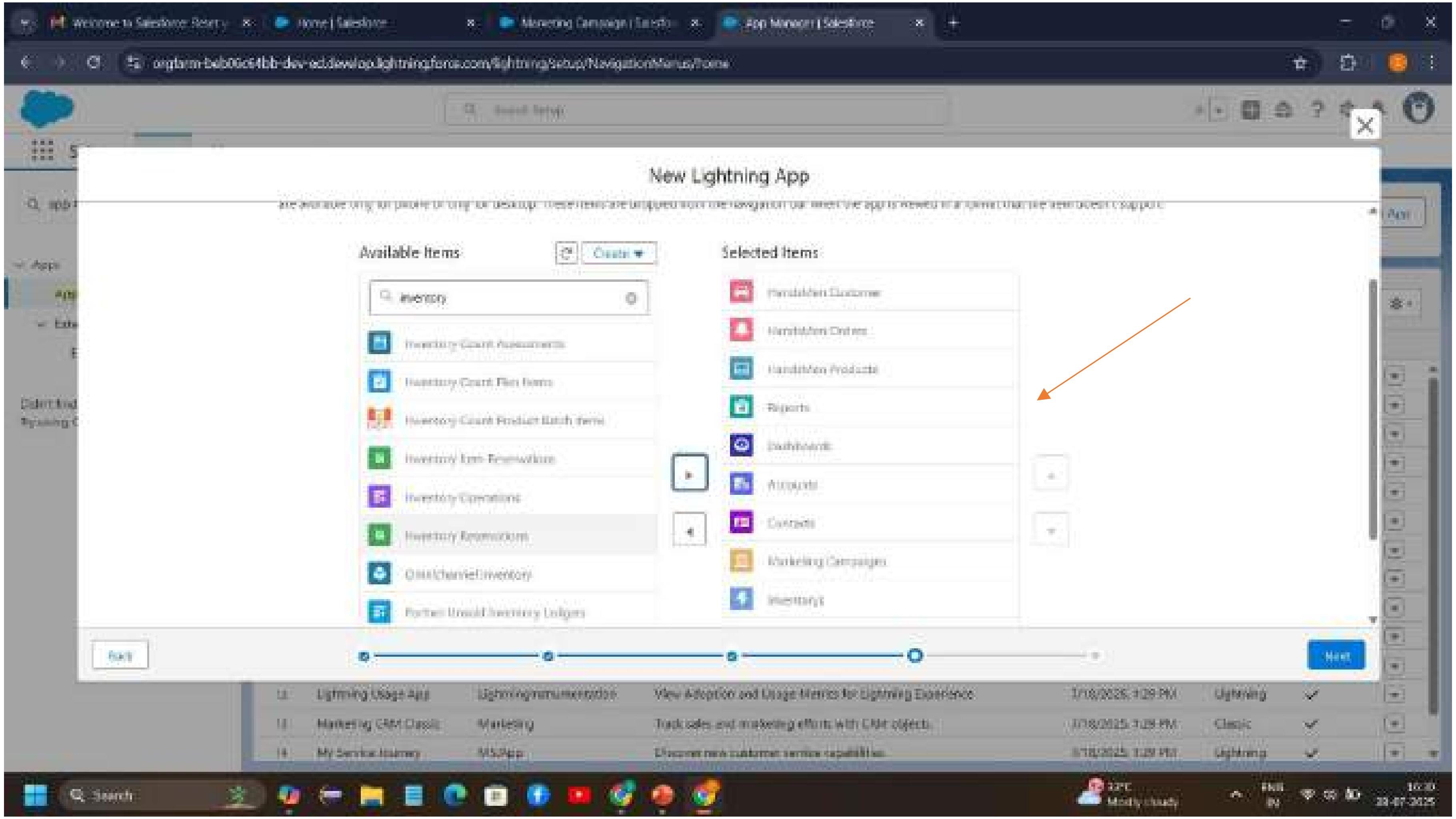
Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.



- 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 defaultThen click Next → (App option page) keep it as default → Next → (Utility Items) keep it as default → Next.

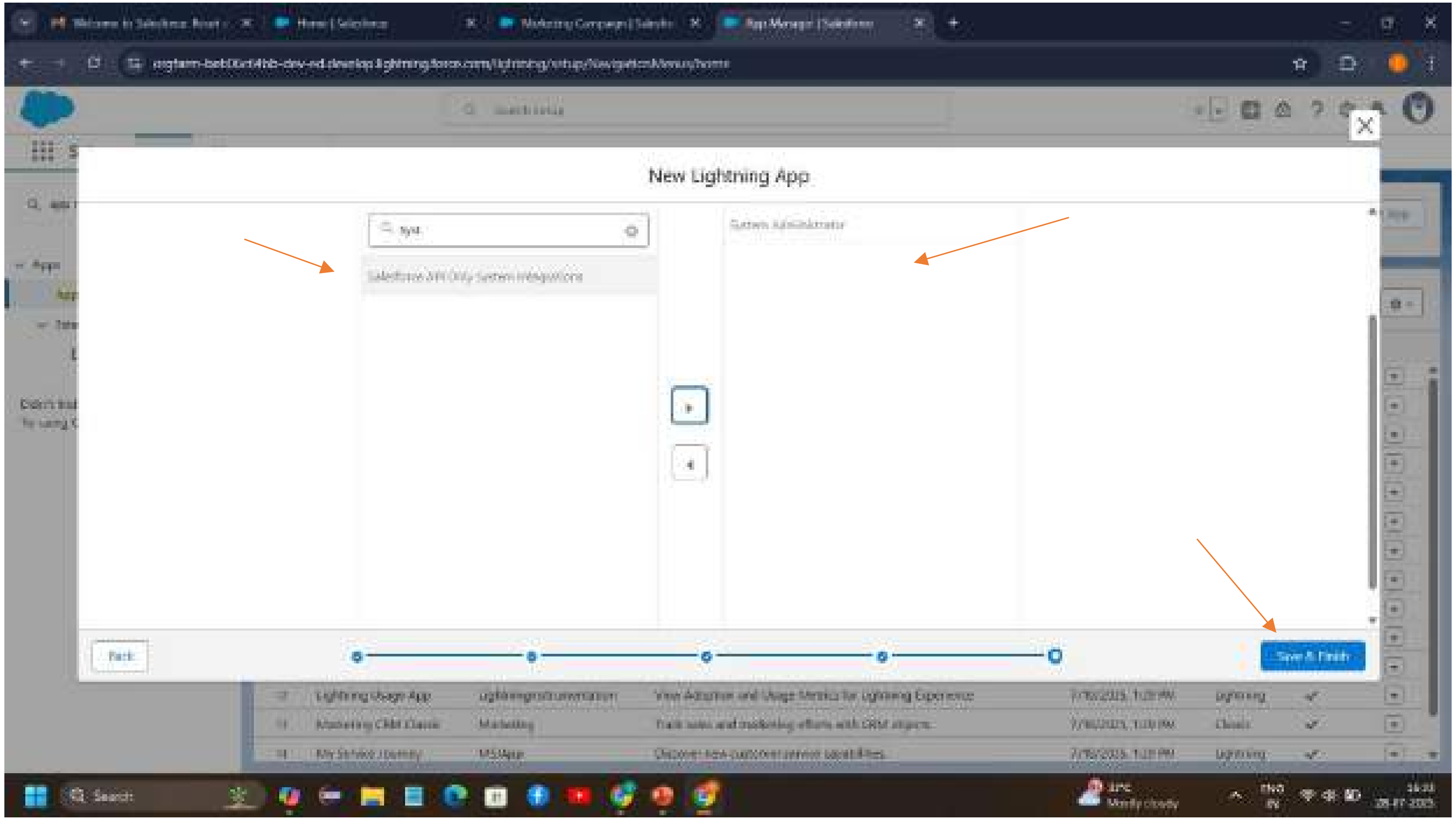


To Add Navigation Items Search the items in the search bar(HandsMen Customer, HandsMen Order, Inventory, HandsMen Product, Reports, Dashboard, Account, Contact , Marketing Campaign) from the search bar and move it using the arrow button → Next.



To Add User Profiles:

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

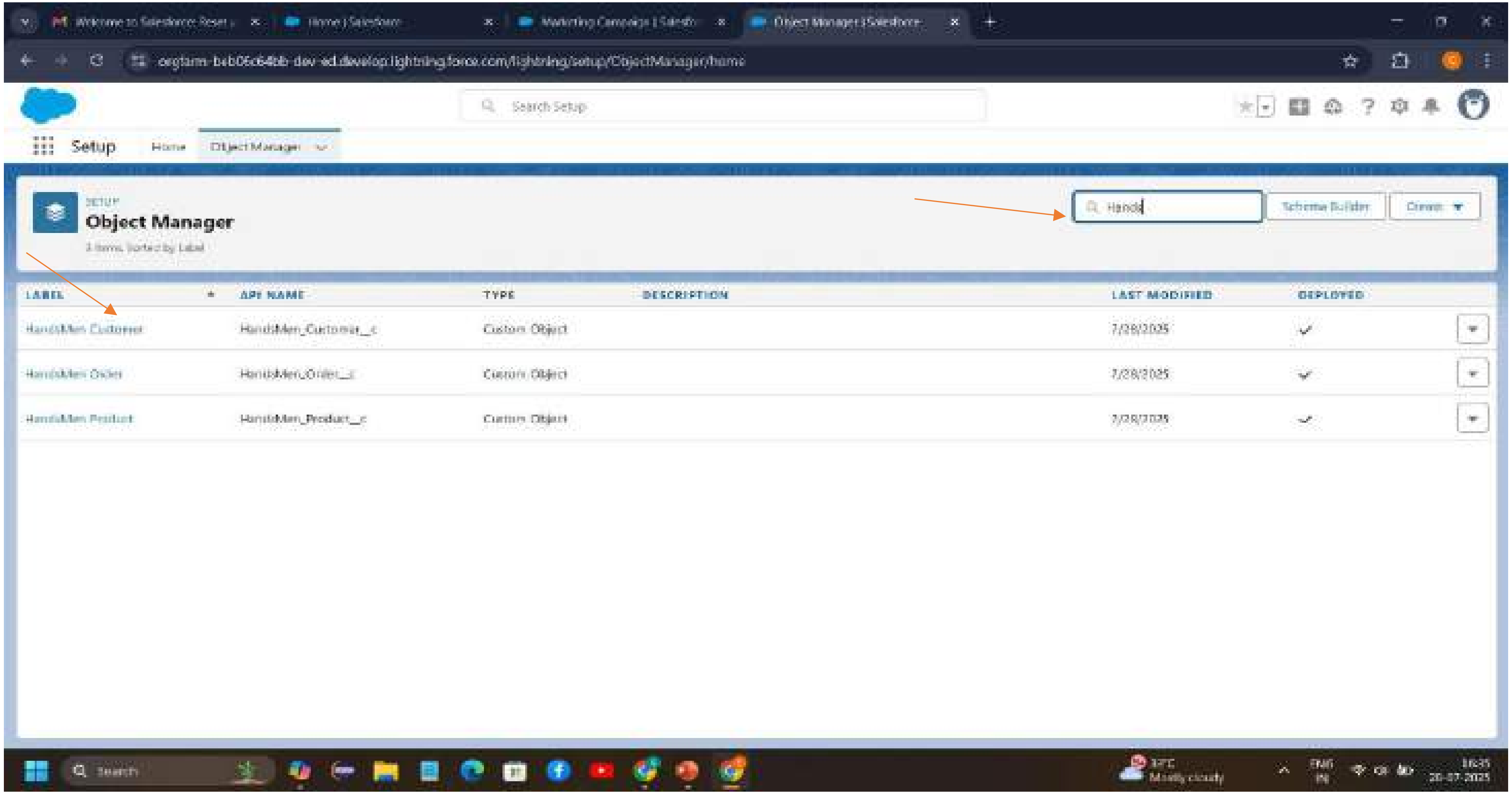


Data Management - Fields

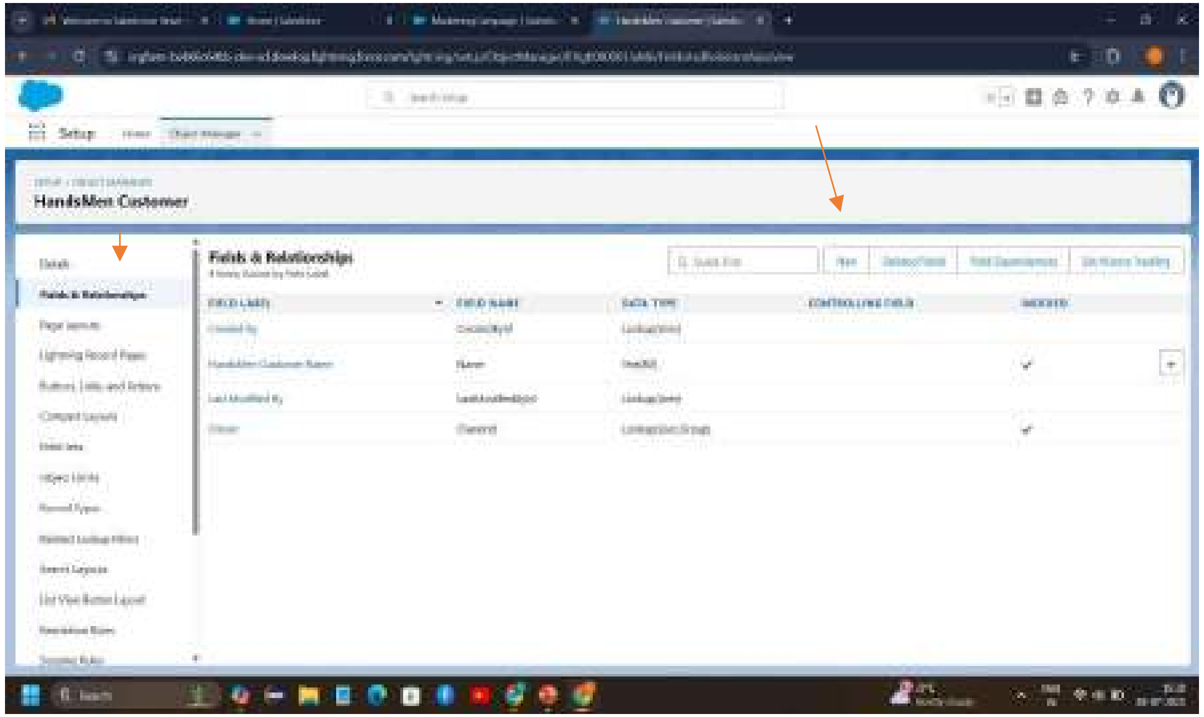
Creating Field in HandsMen Customer Object

To create fields in an object:

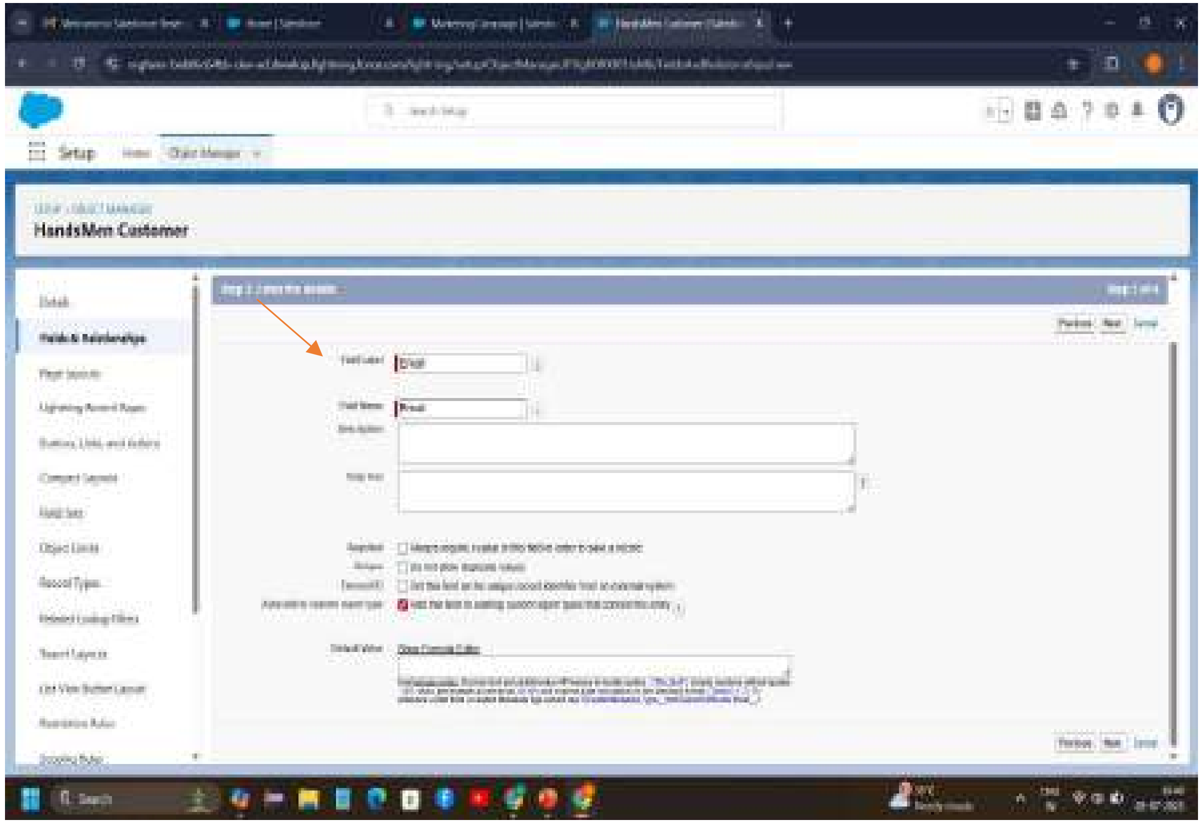
Go to setup → click on Object Manager → type object name(HandsMen Customer) in quick find bar→ click on the object.



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.

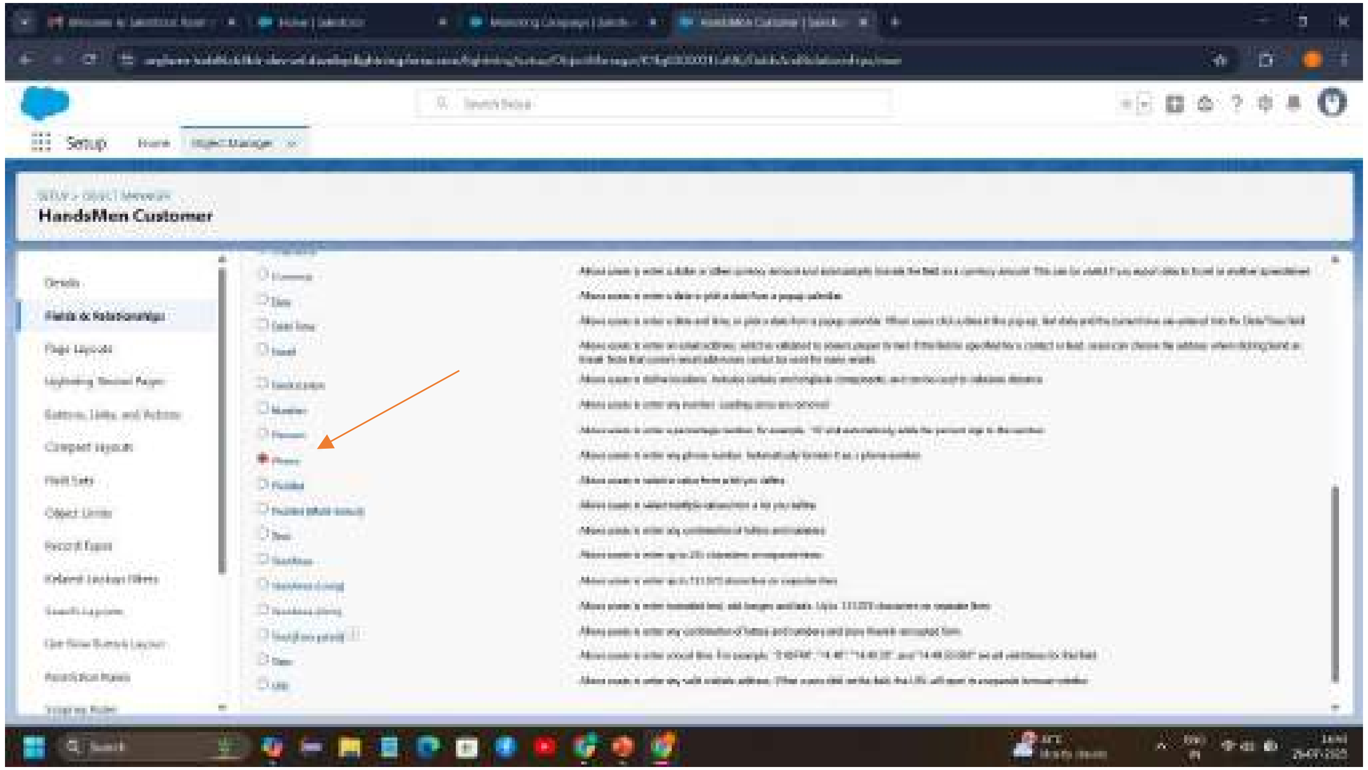


Creating Phone on HandsMen Customer Object

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.

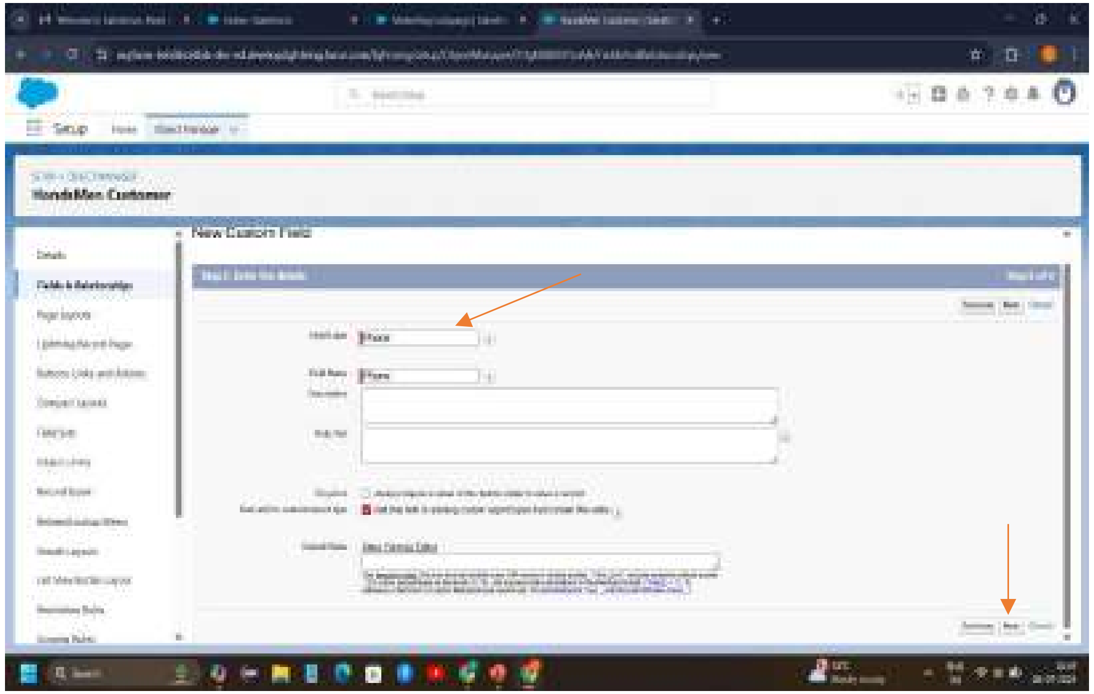


Fill the above as following:

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.

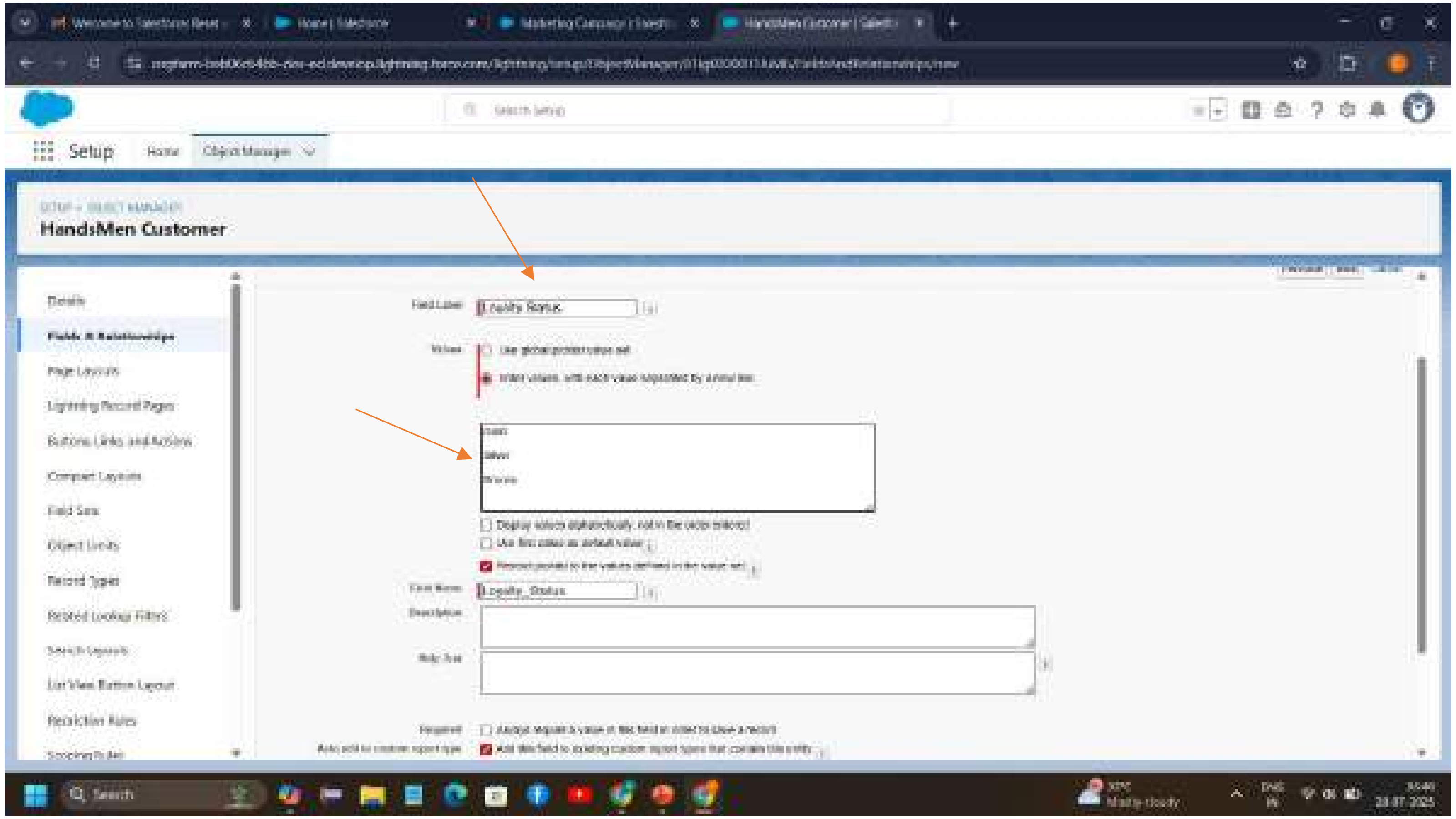
Select Data type as “Picklist” and click Next.

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



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.

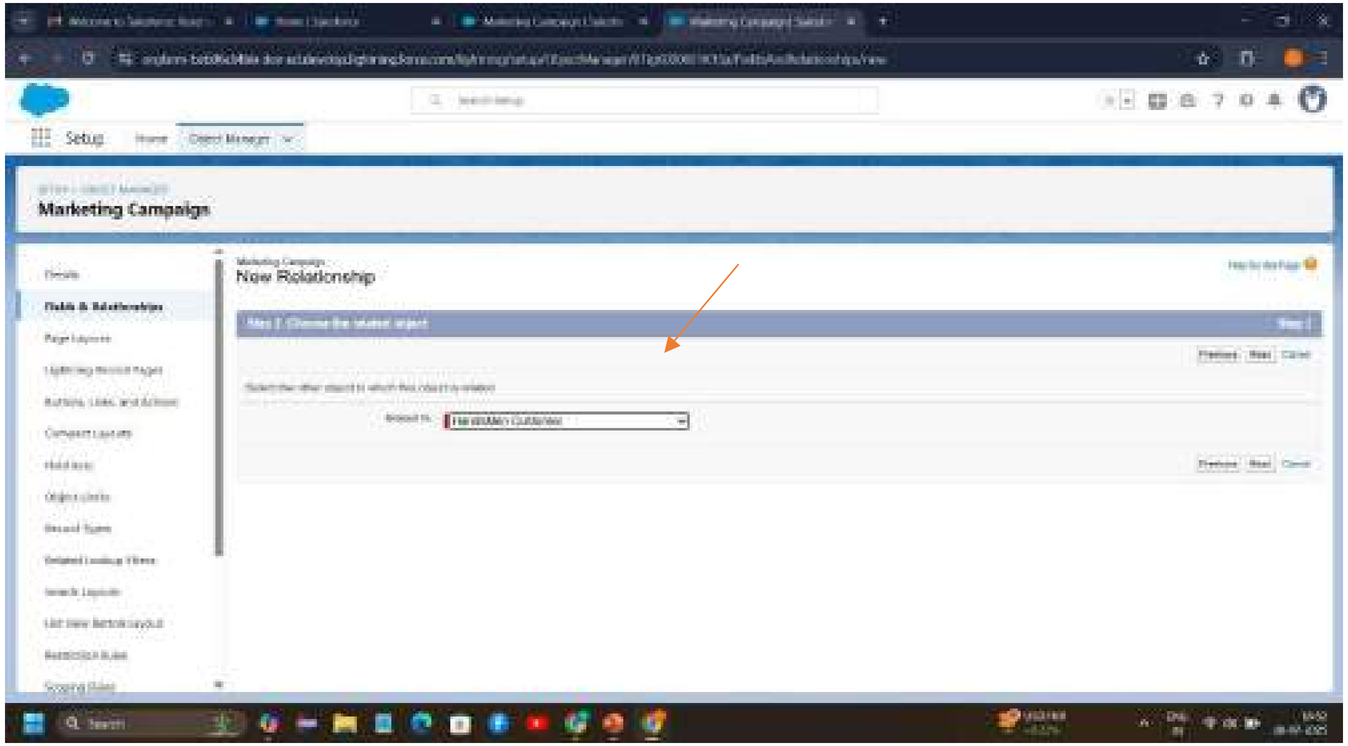
Click on fields & relationship → click on New.

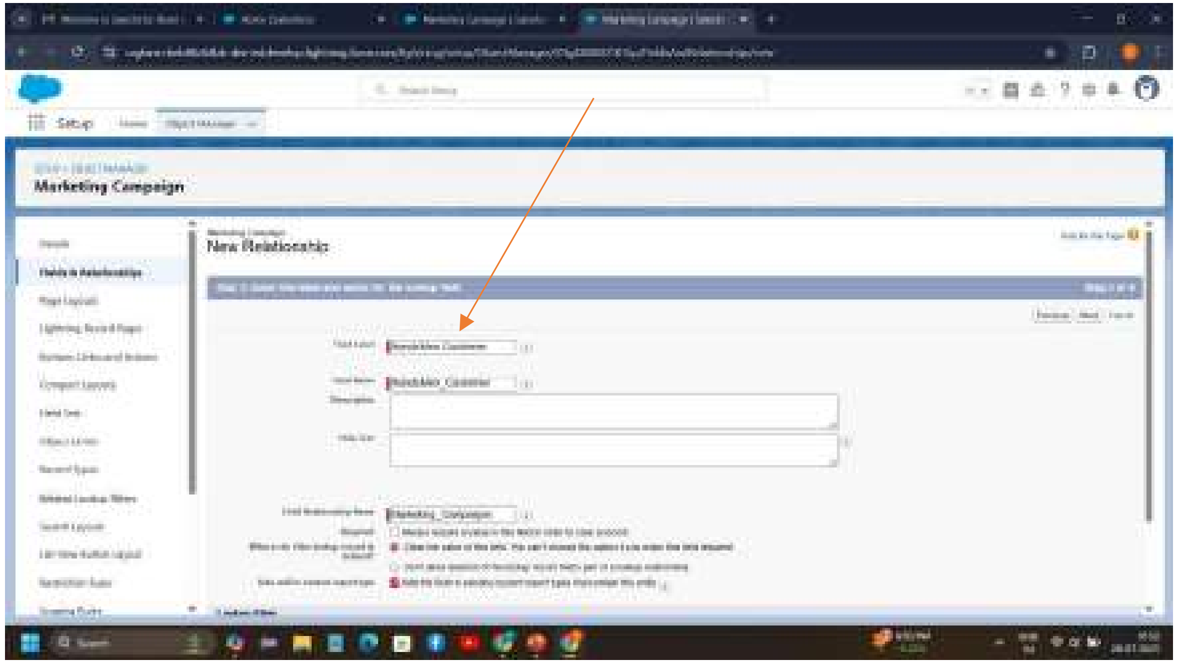
Select “lookup relationship” as data type and click Next.

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.

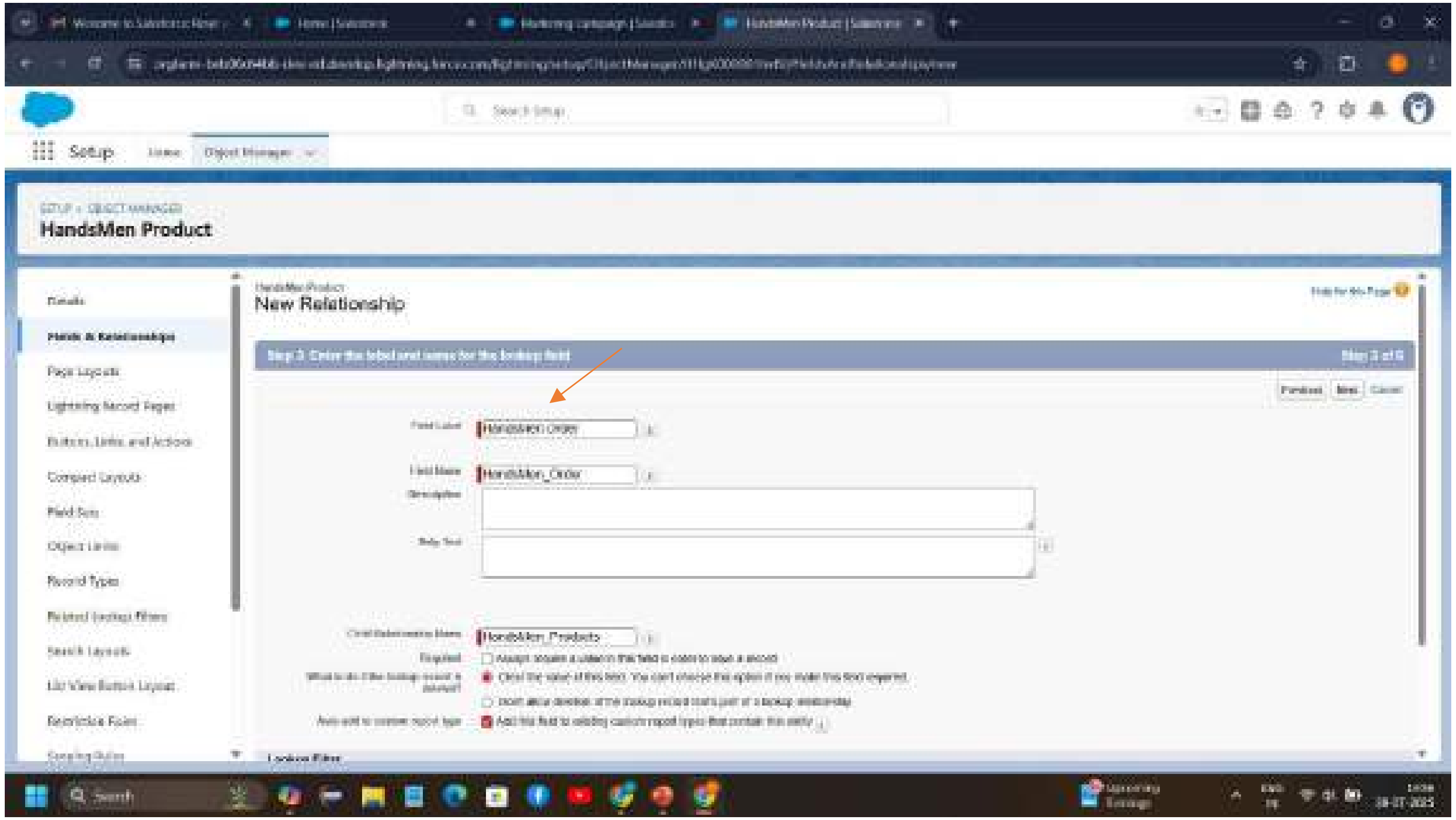
Click on fields & relationship → click on New.

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.

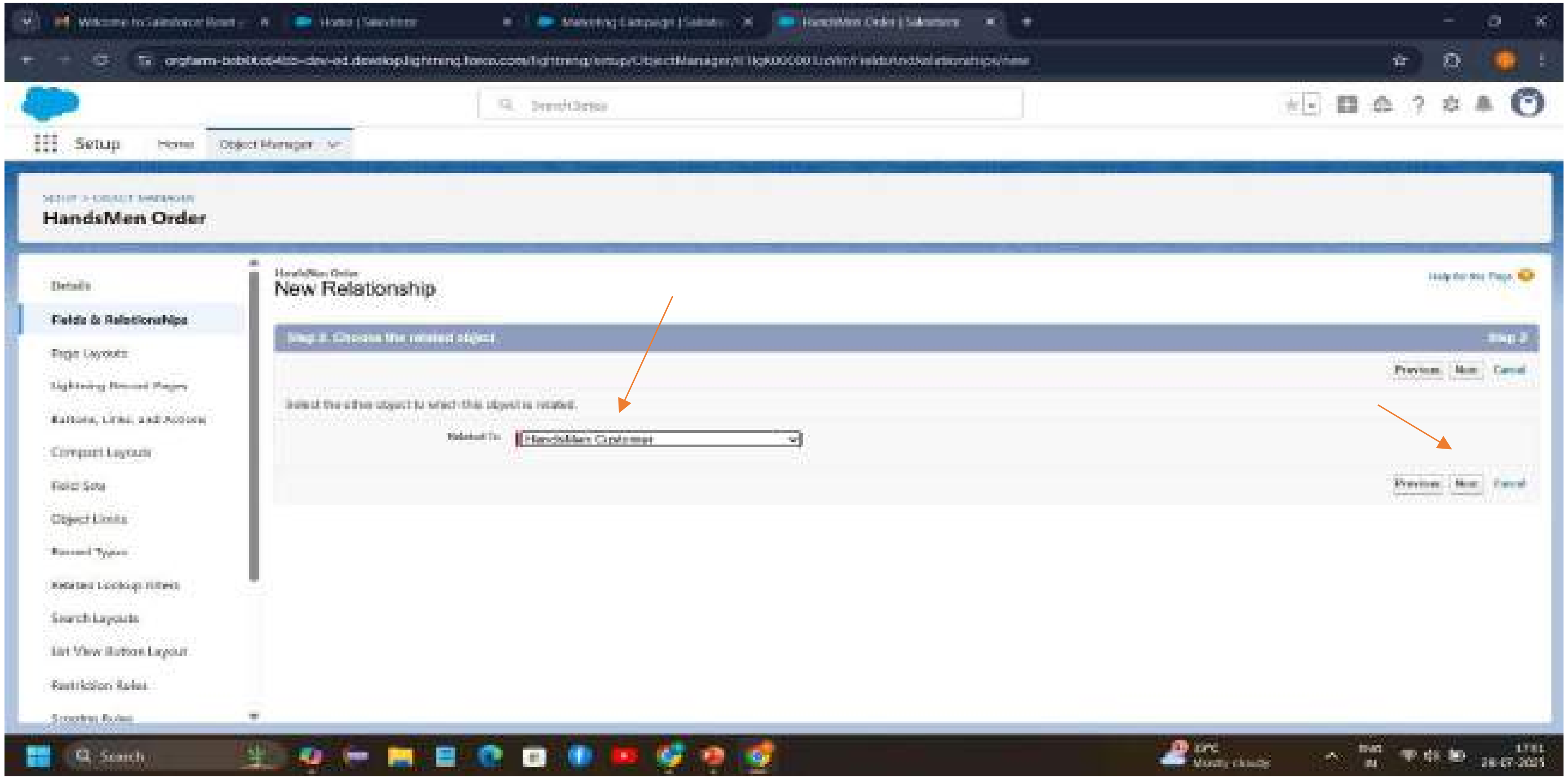
Click on fields & relationship → click on New.

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.

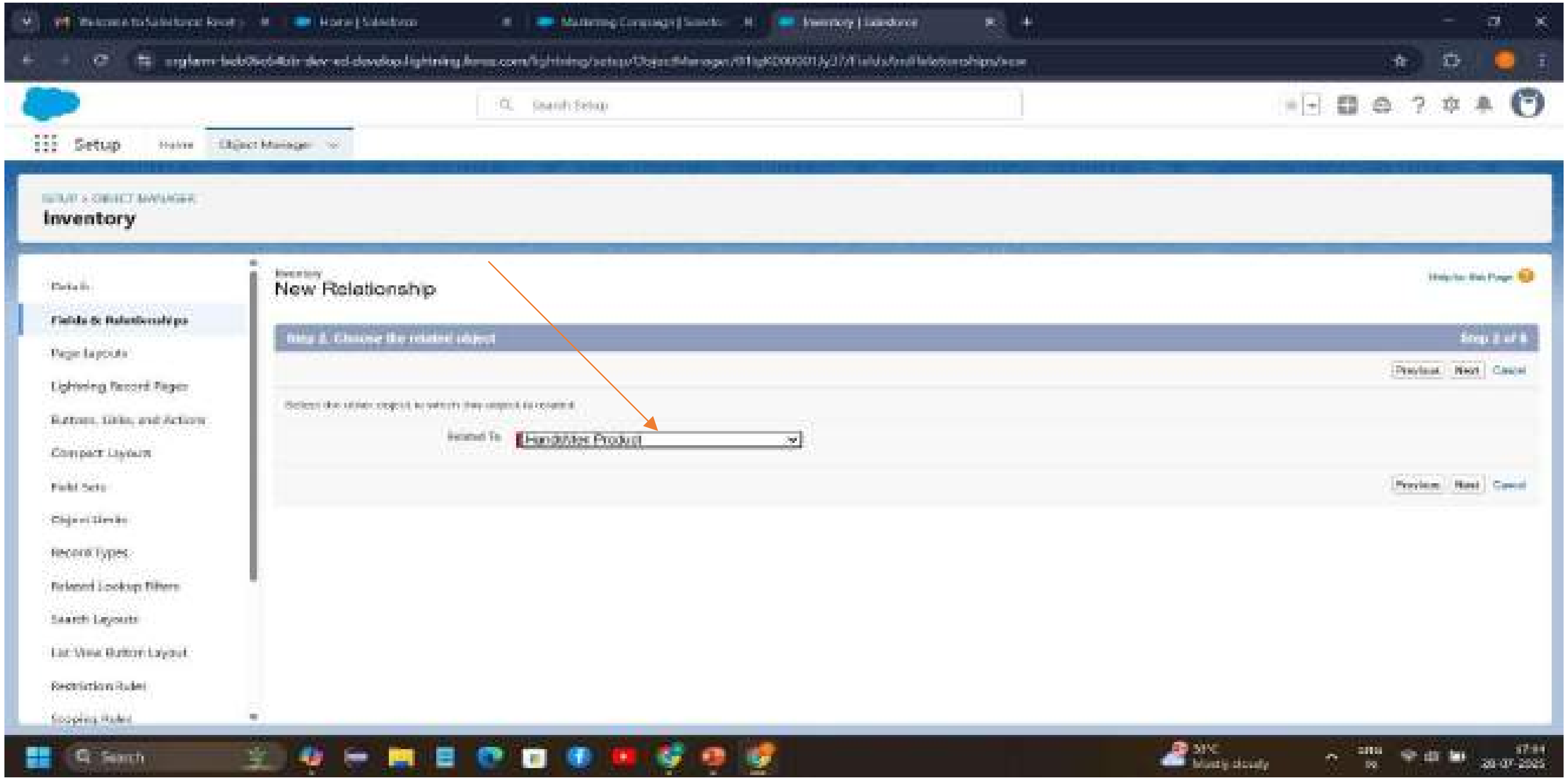
Click on fields & relationship → click on New.

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

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

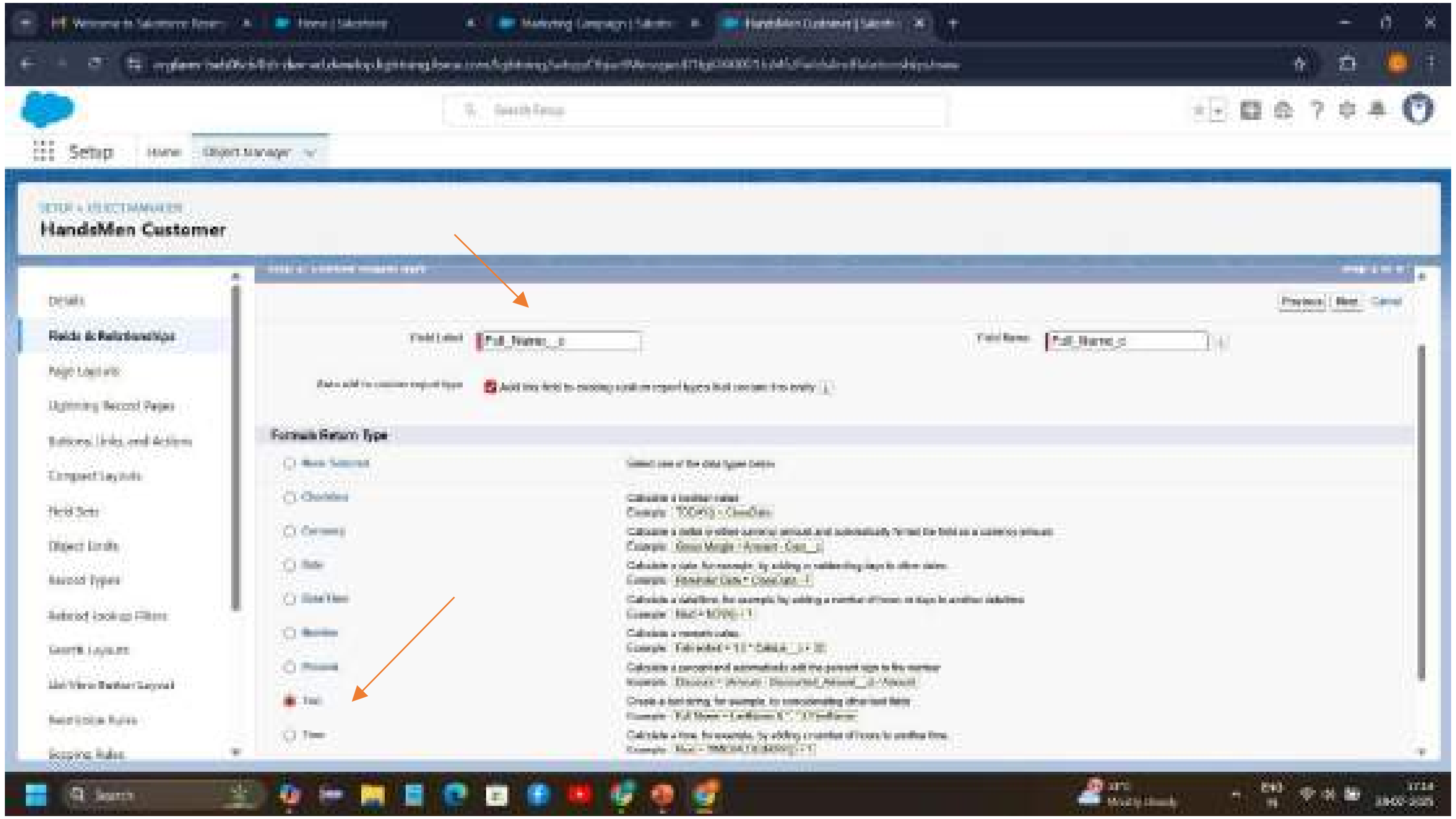
Give Field Label as “Product” and click Next.

Next → Next → Save.

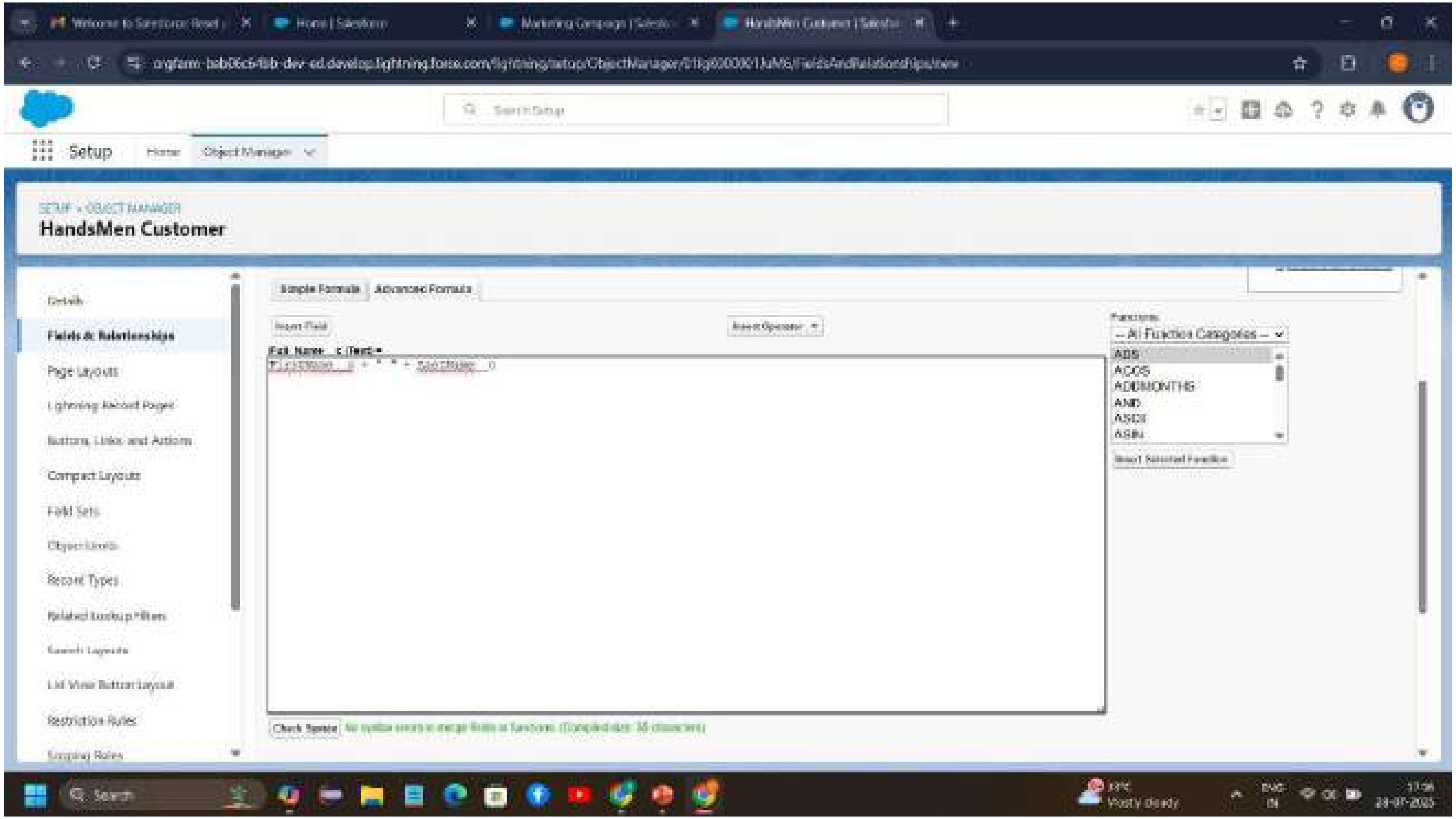


Formula Fields

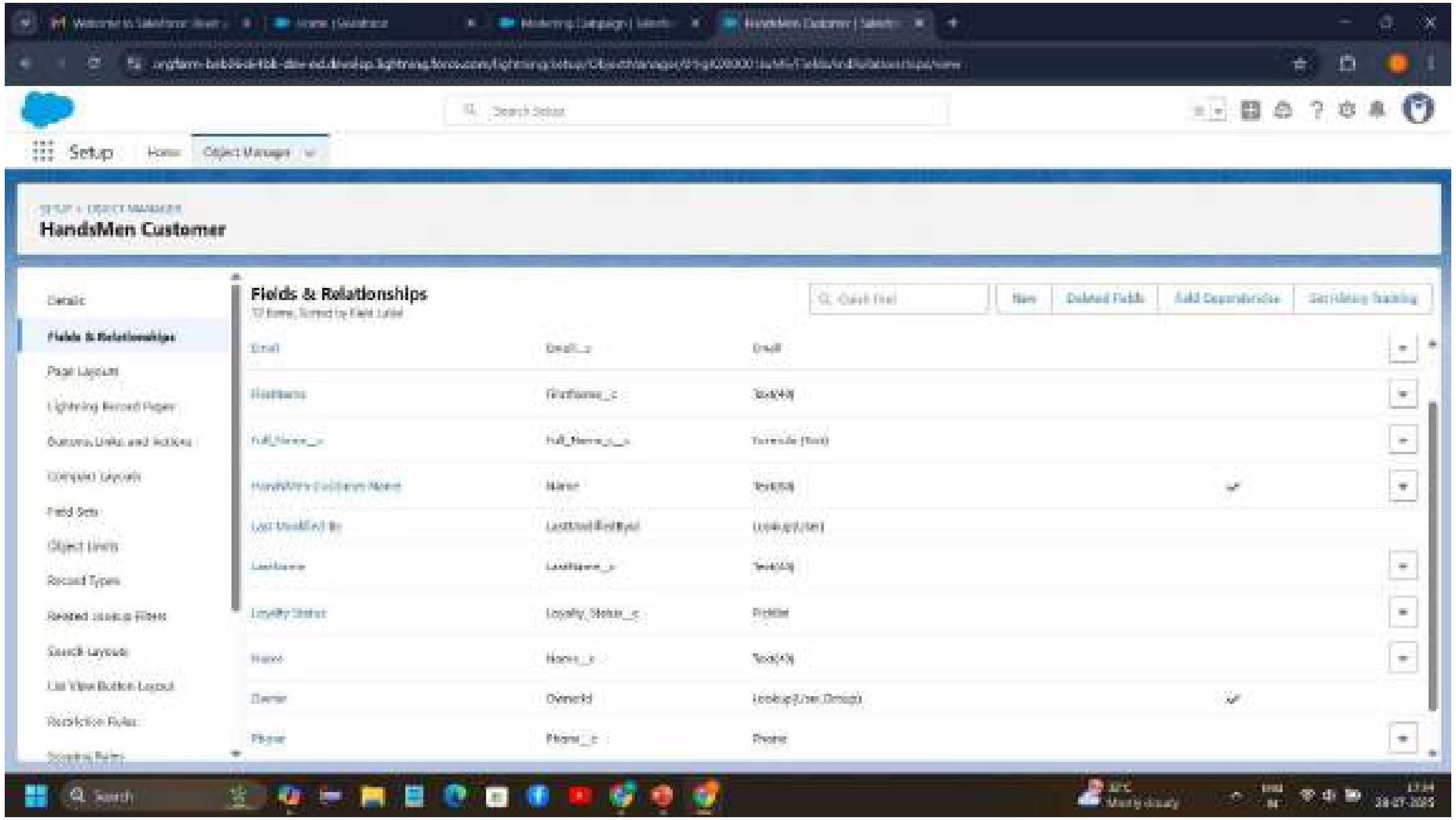
Go to the setup page → click on object manager → type object name(HandsMen_Customer__c) in the quick find bar→ click on the object.
Click on fields & relationship → click on New.
Select Data type as “Formula” and click Next.
Give Field Label and Field Name as “Full_Name__c” and select formula return type as “Text” and click next.



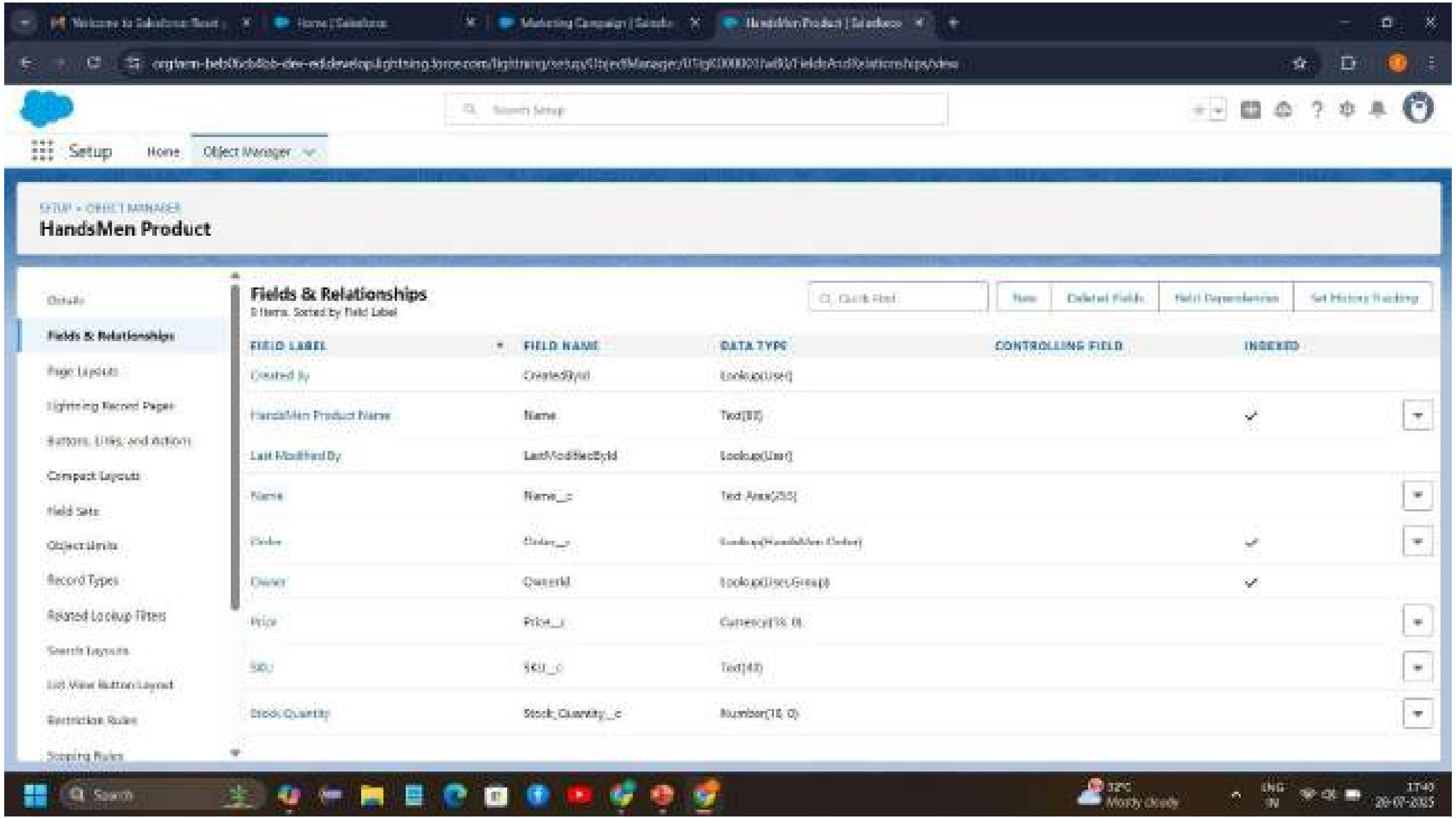
Under Advanced Formula write down the formula and click “Check Syntax” and Next→ Next→ Save & New.



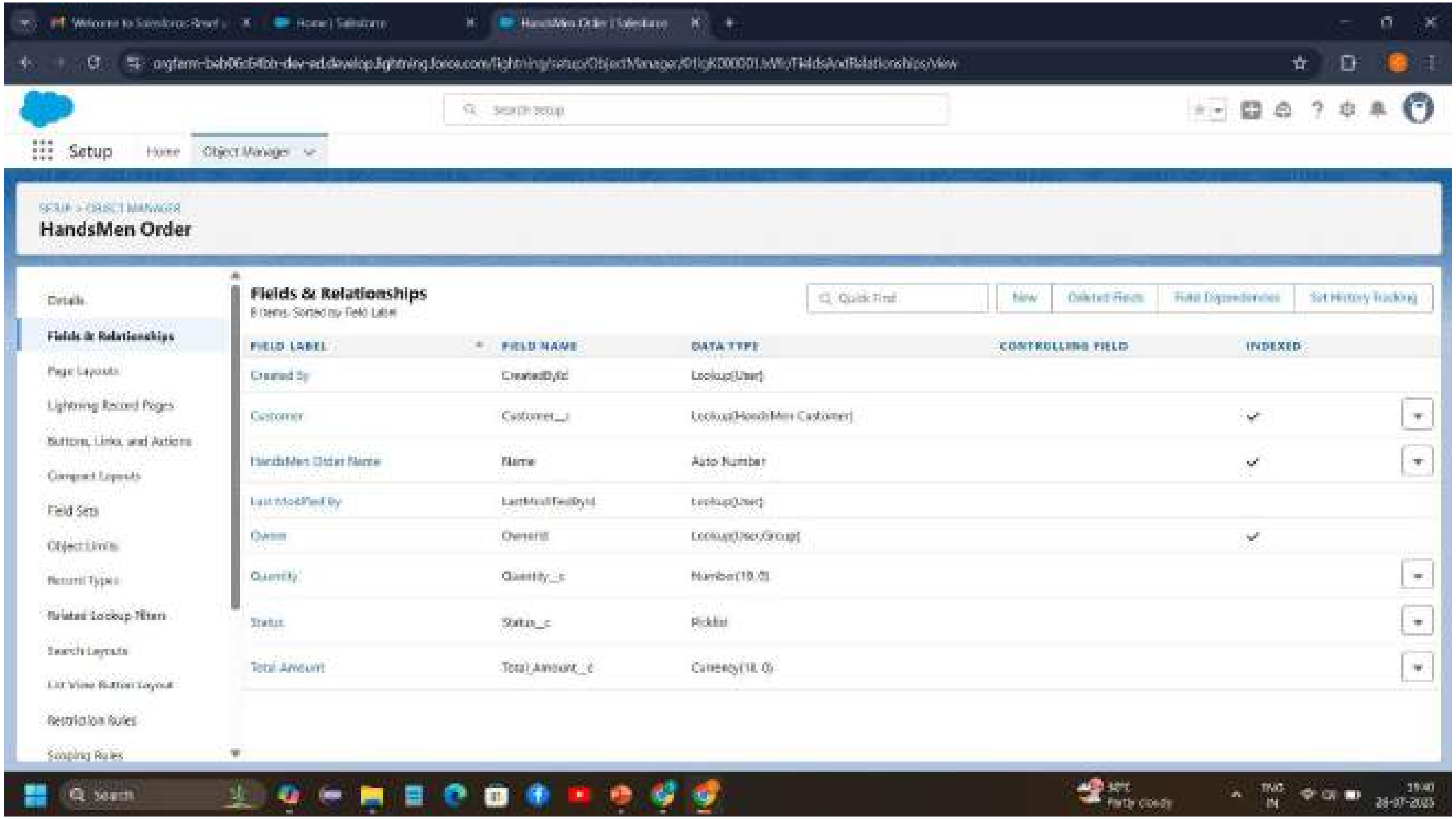
Object Name: HandsMen Customer__c
Type: Custom object
Description: Stores customer details
Key fields:
Name (Record Name),
Email (Email),
Phone (Phone),
Loyalty_Status__c (Picklist: Bronze, Gold, Silver) [Loyalty status field is already created in previous activity do not create it again,
Total_Purchases__c (Number)



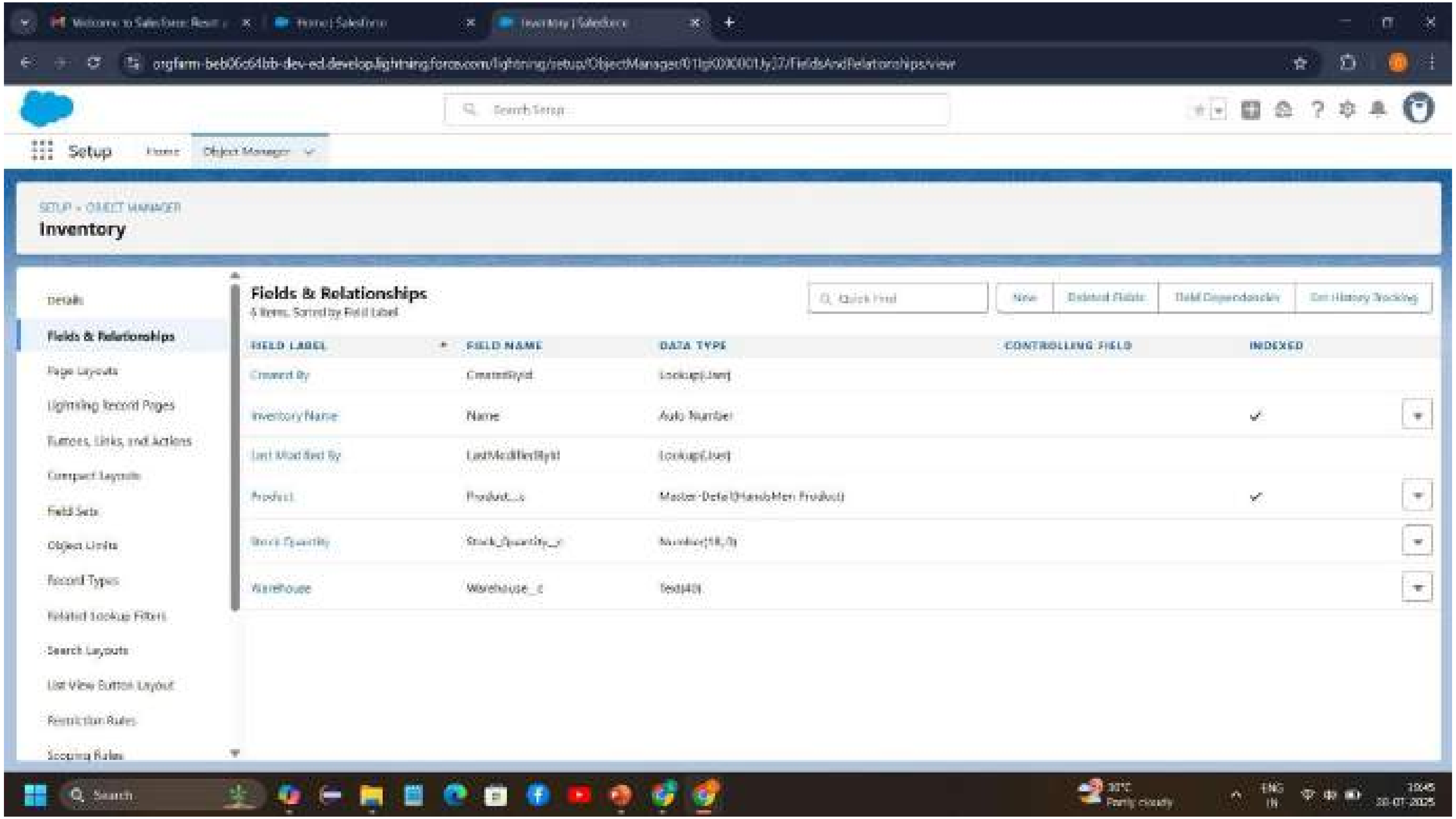
Object Name: HandsMen Product__c
Type: Custom Object
Description: Stores product catalog
Key Fields: Name (Record Name),
SKU (Text),
Price (Currency),
Stock_Quantity__c (Number)



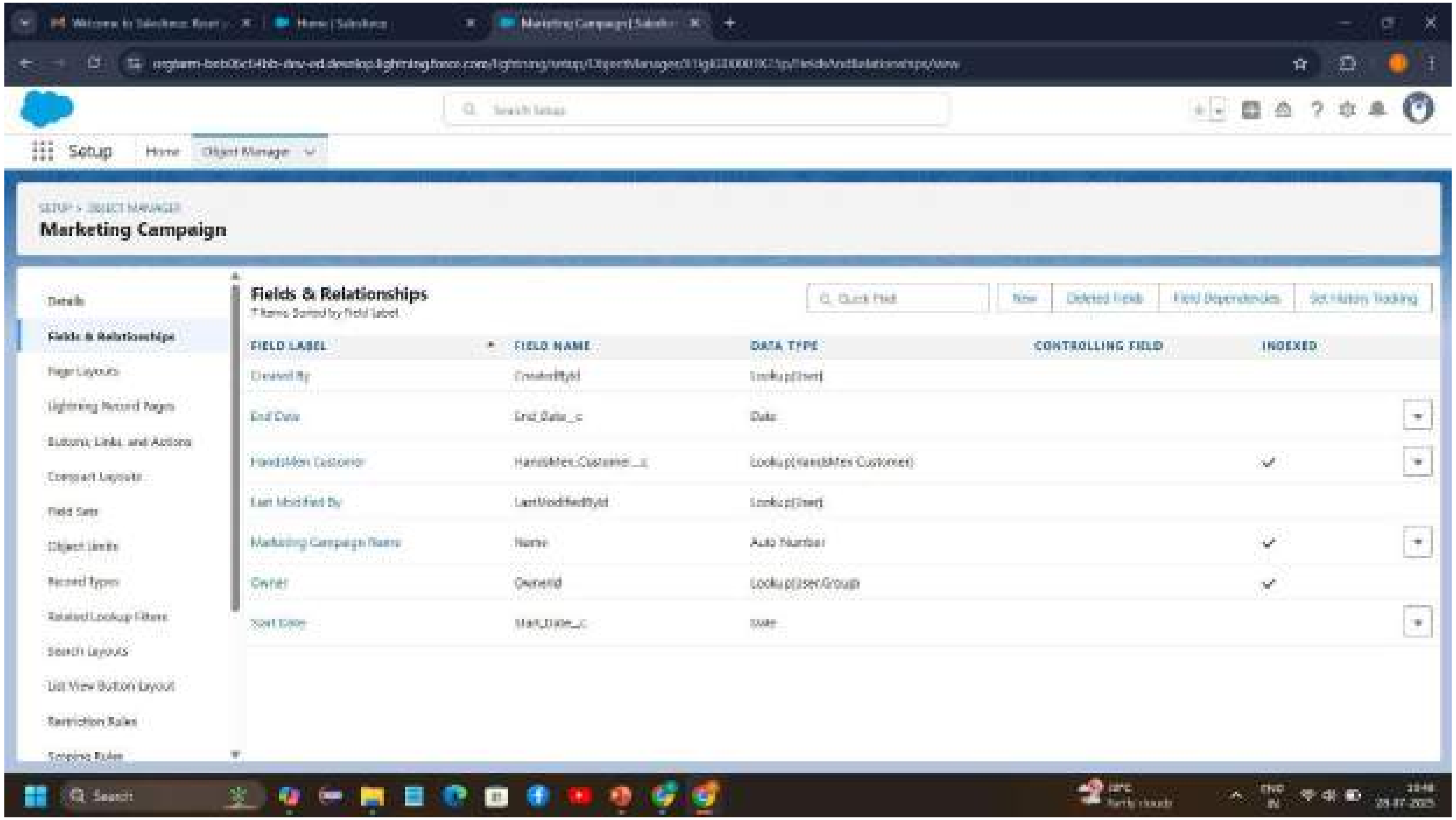
Object Name: HandsMen Order__c
Type: Custom Object
Description: Stores customer orders
Key Fields: Order_Number (Record Name),
Status (Picklist: Pending, Confirmed, Rejection),
Quantity__c (Number),
Total_Amount__c(Number)



Object Name: Inventory__c
Type: Custom Object
Description: Tracks inventory levels
Key Fields: Auto Number (Record Name),
Warehouse (Text),
Stock_Quantity__c (Number)



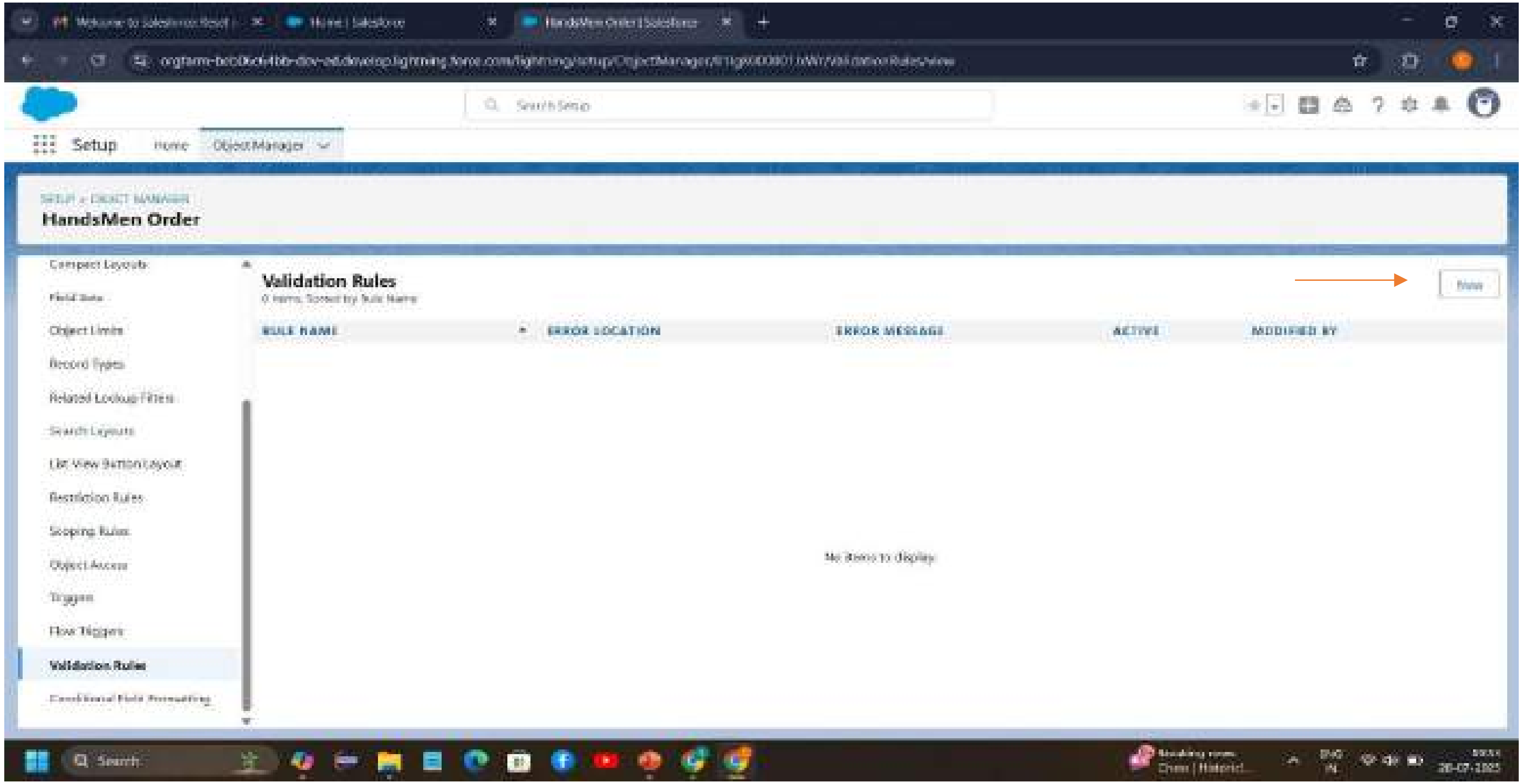
Object Name: Marketing_Campaign__c
Type: Custom Object
Description: Manages promotions & campaigns
Key Fields:Campaign_Name (Record Name),
Start_Date (Date),
End_Date (Date)

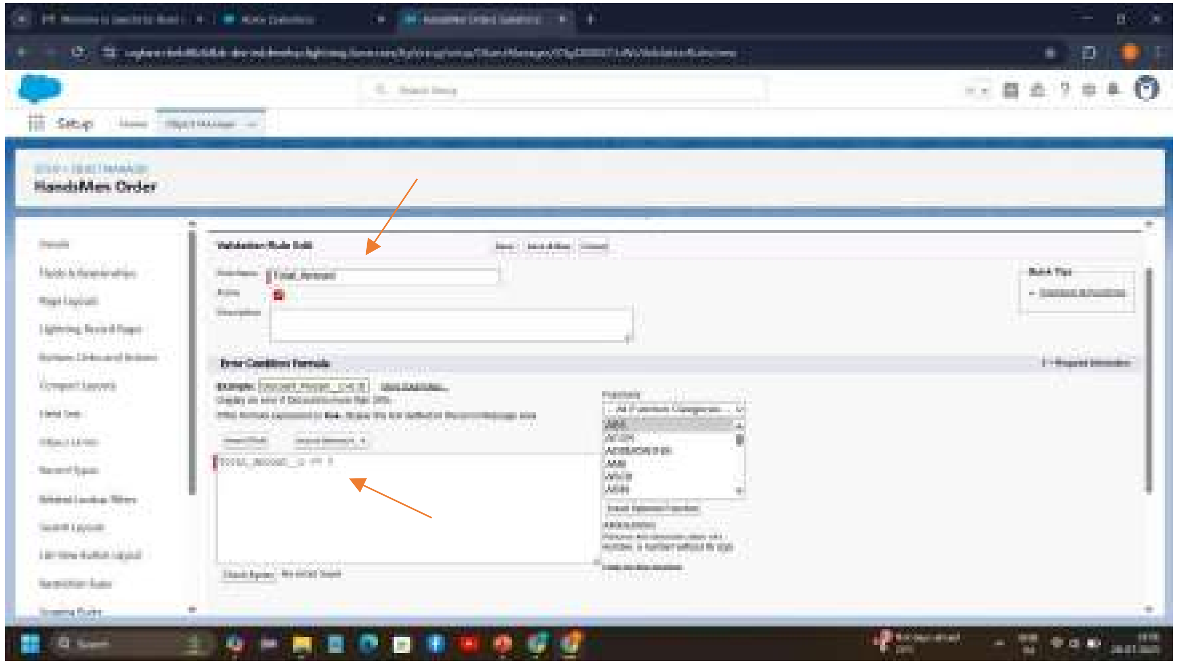


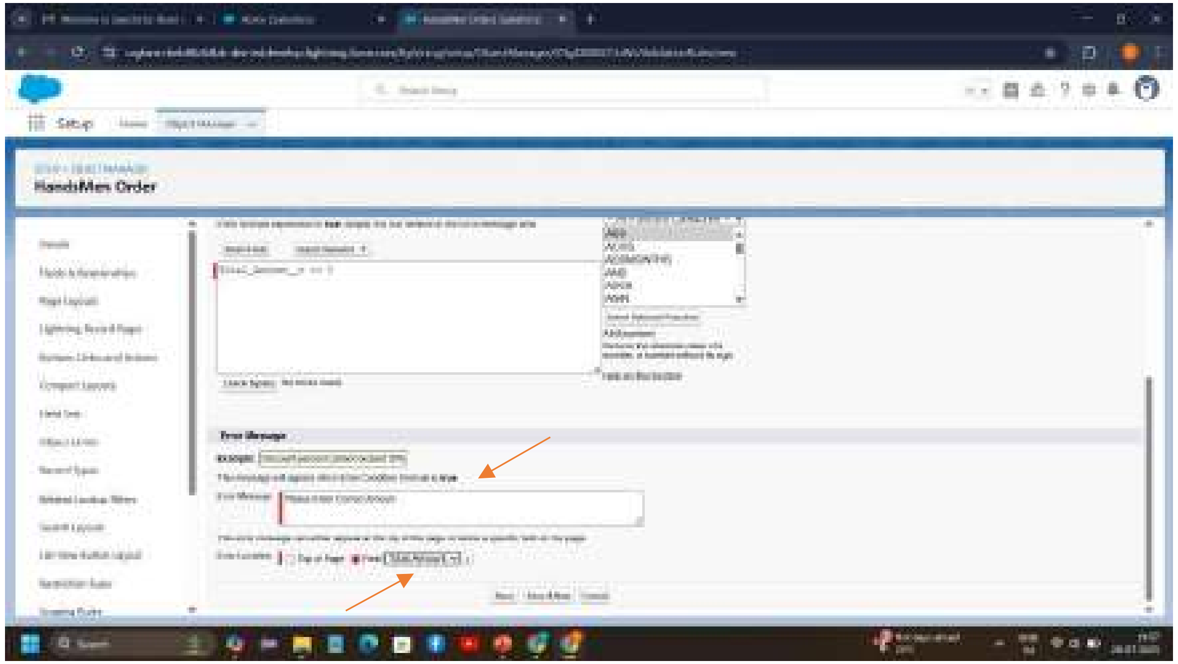
Data Configuration

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.




Setup
HandsMen Order
Validation Rule Edit
Error Condition Formula


Setup
HandsMen Order
Error Message

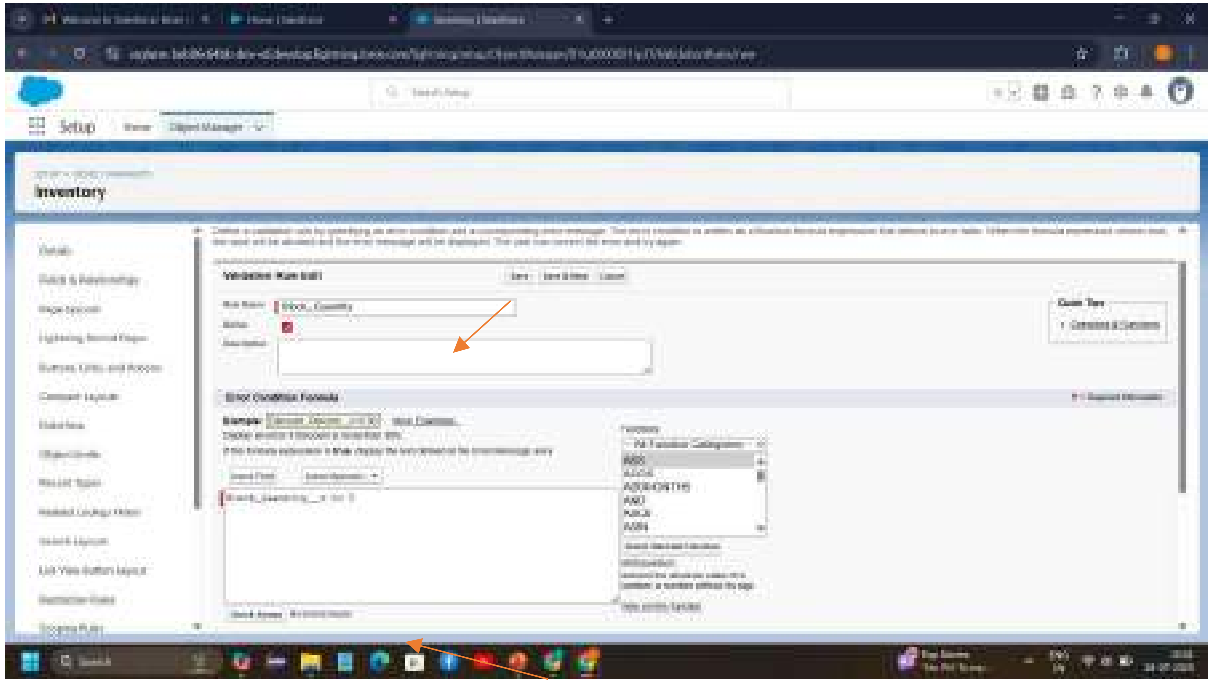
Create One more Validation rule for Inventory object.

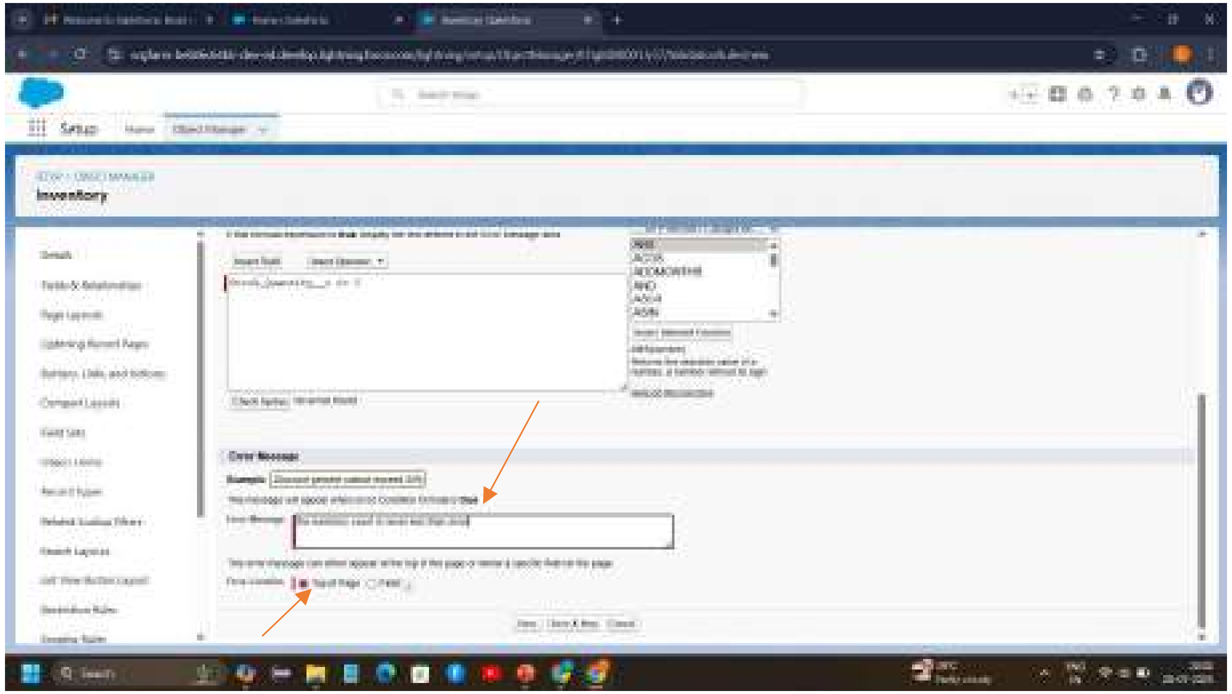
Enter Rule name as “Stock Quantity “.

Insert the Error Condition Formula as : -

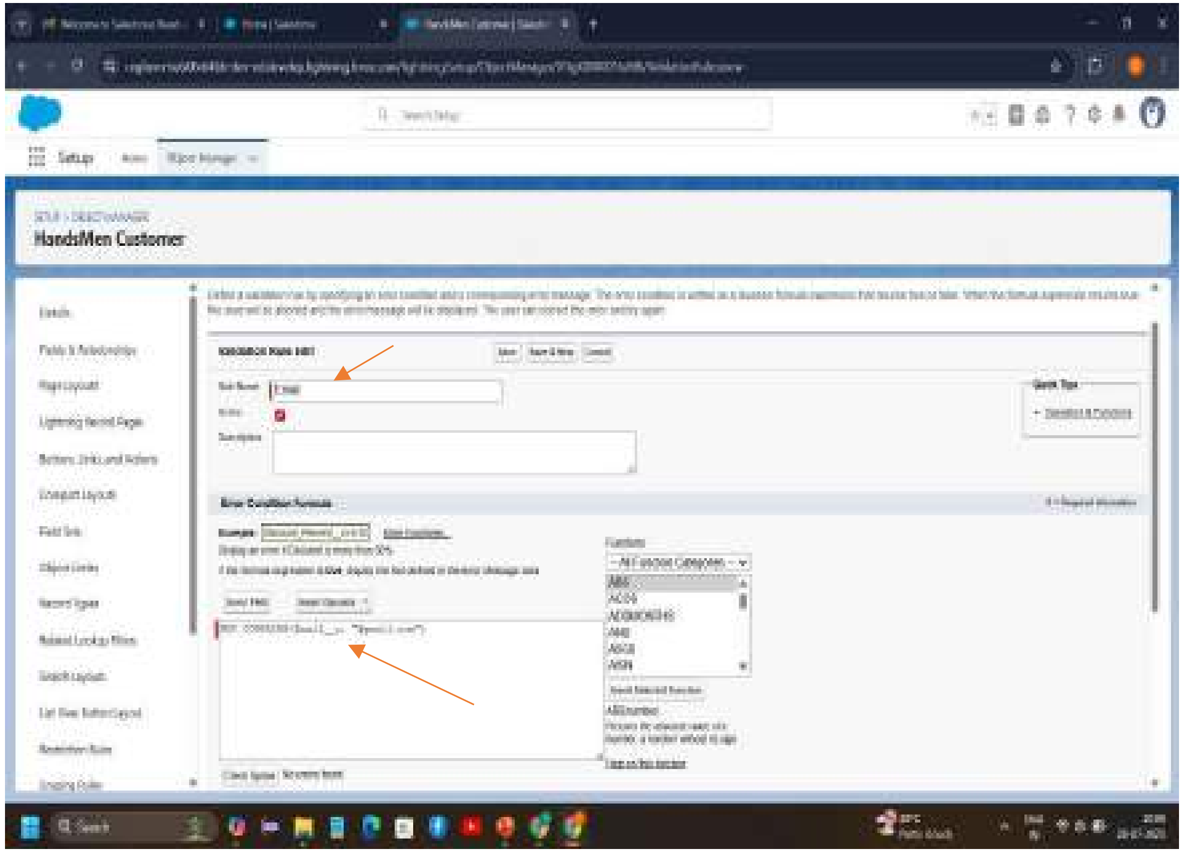
Stock_Quantity__c < = 0

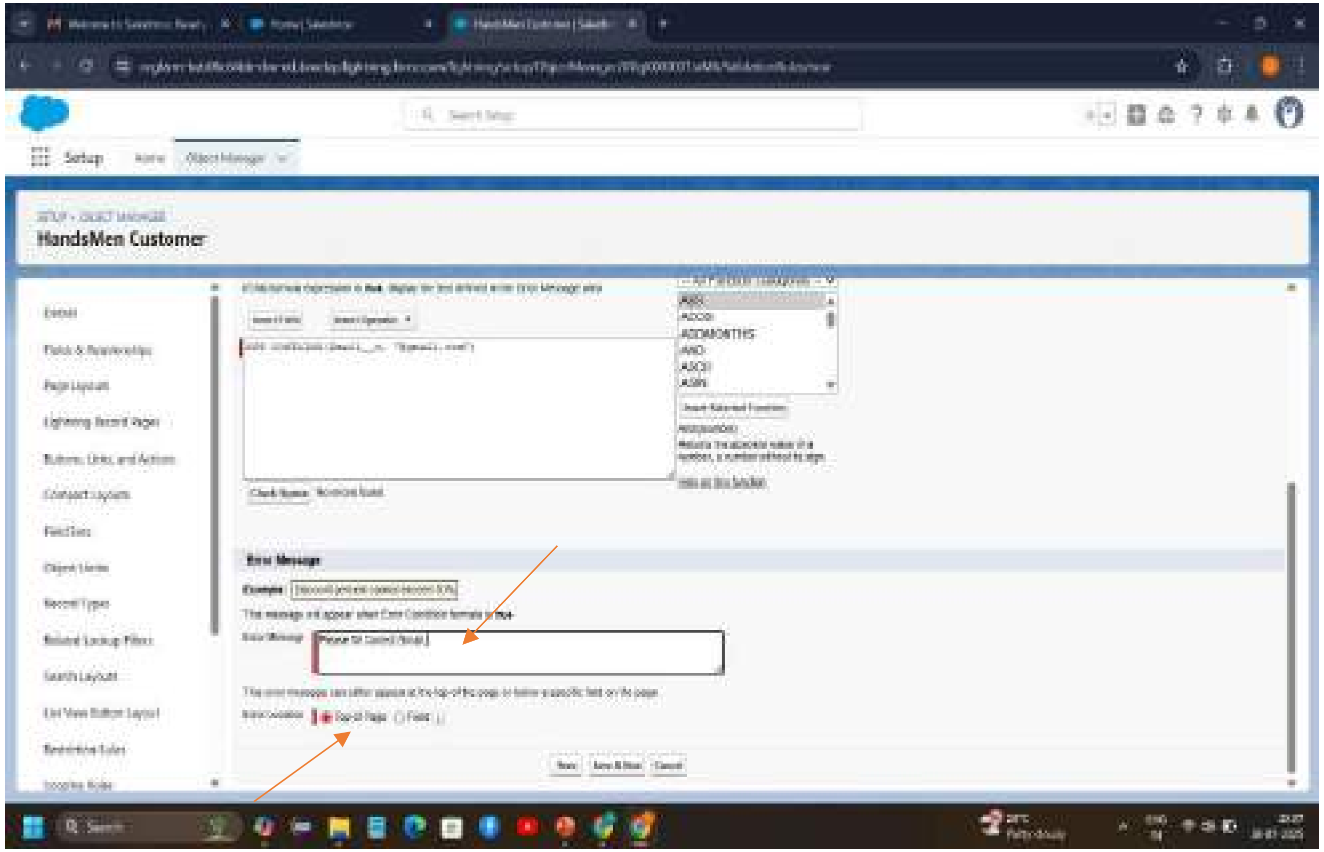
Enter the Error Message as “ the inventory count is never less than zero.”, select the Error location as Top of Page and click Save.





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.

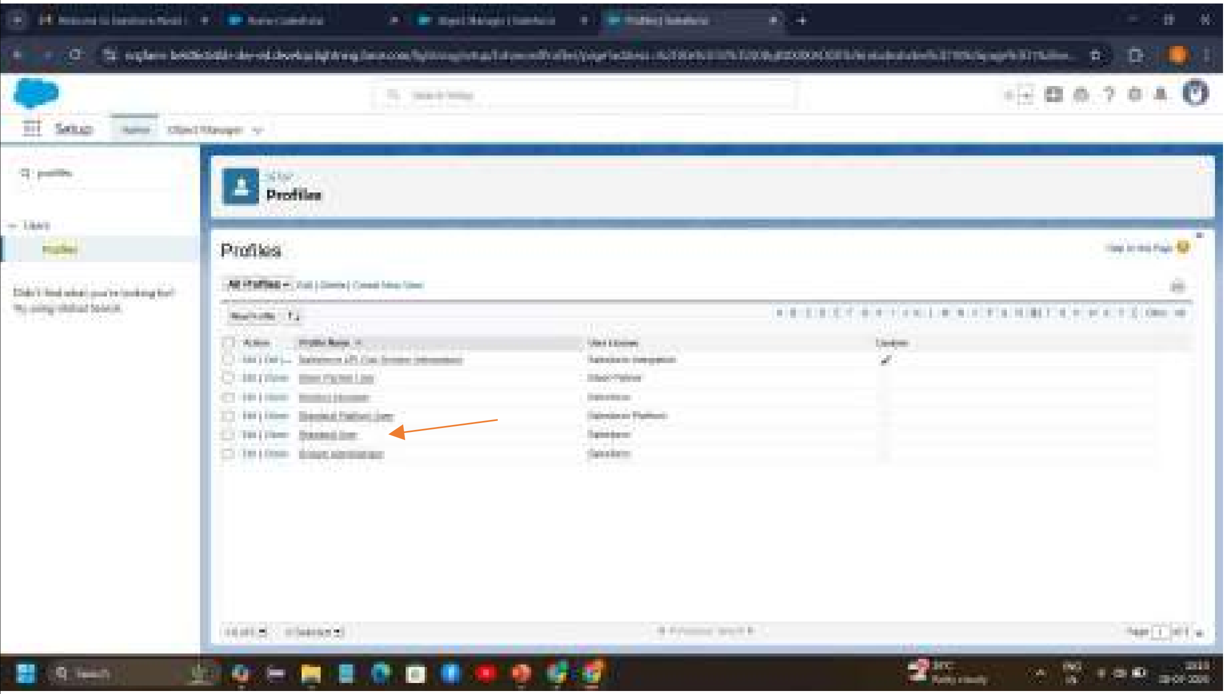


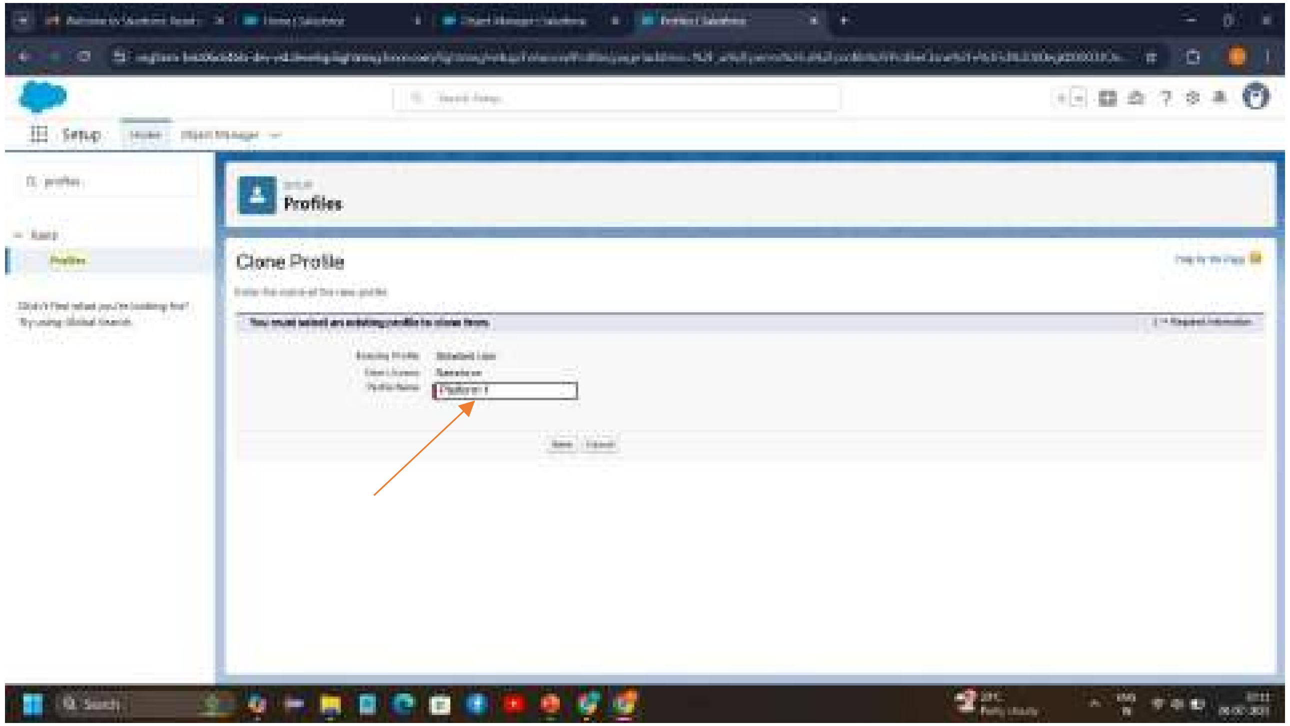


Profile - Sales

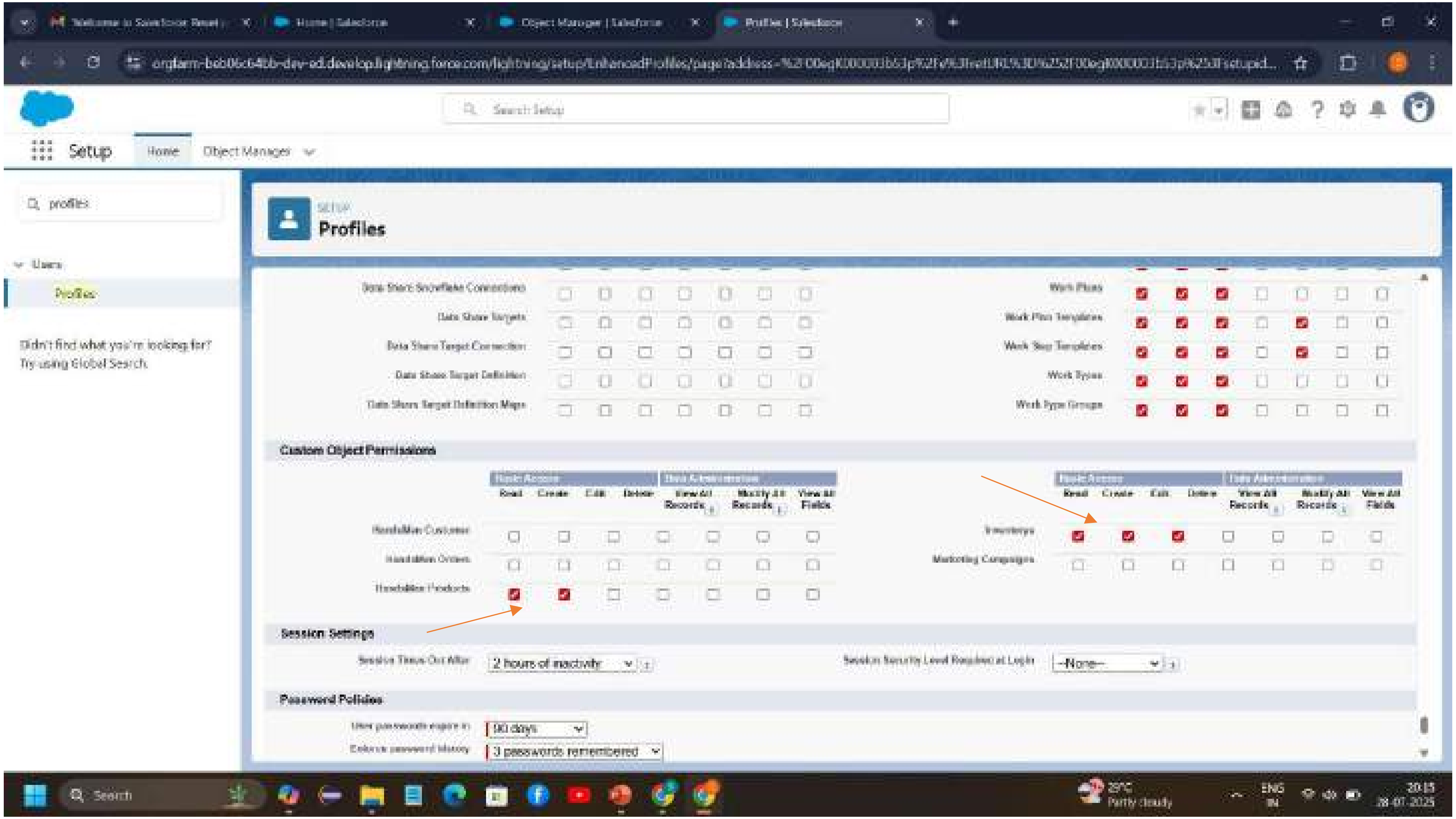
Creating Profile

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.

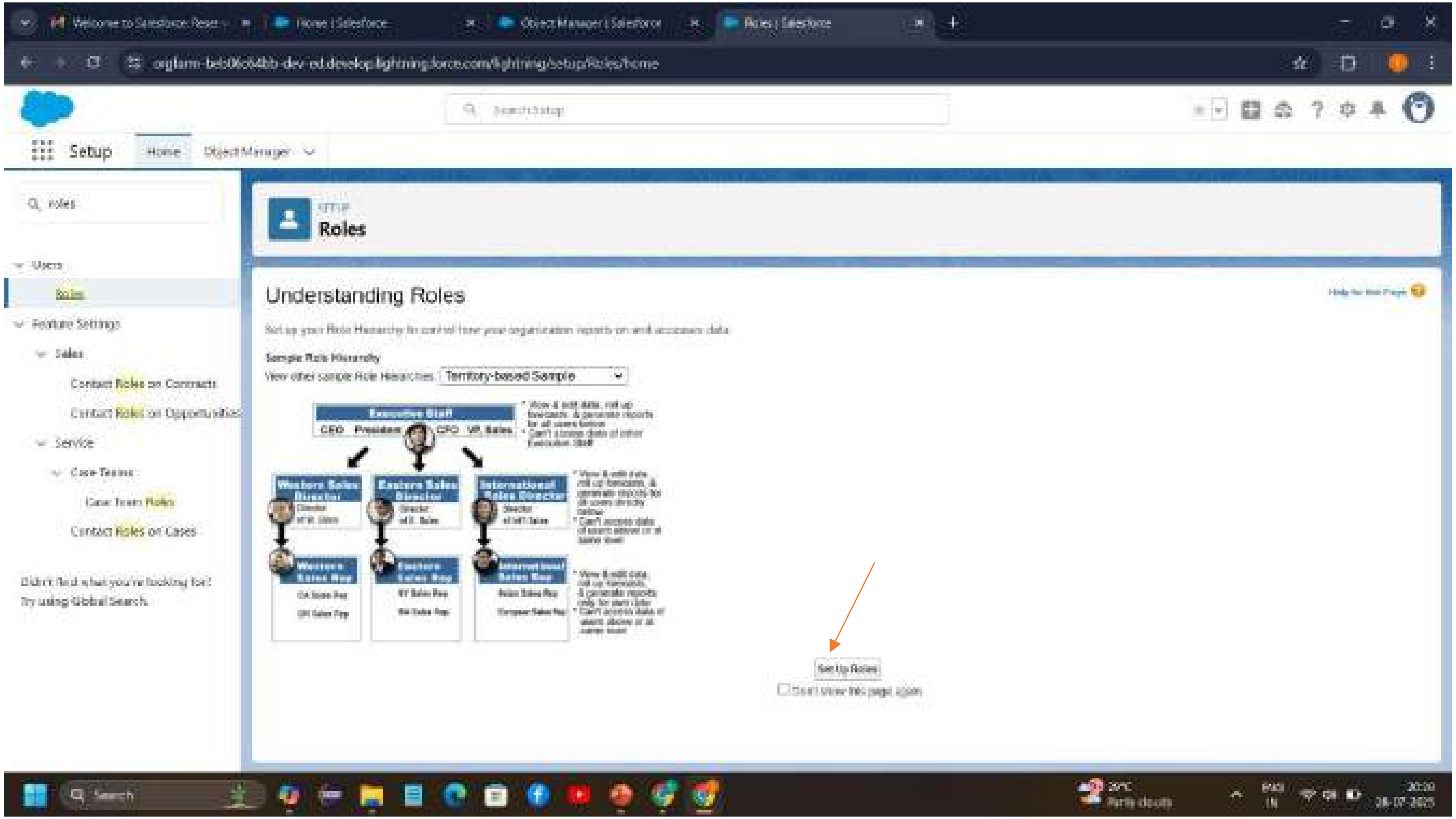


Data Security - Roles

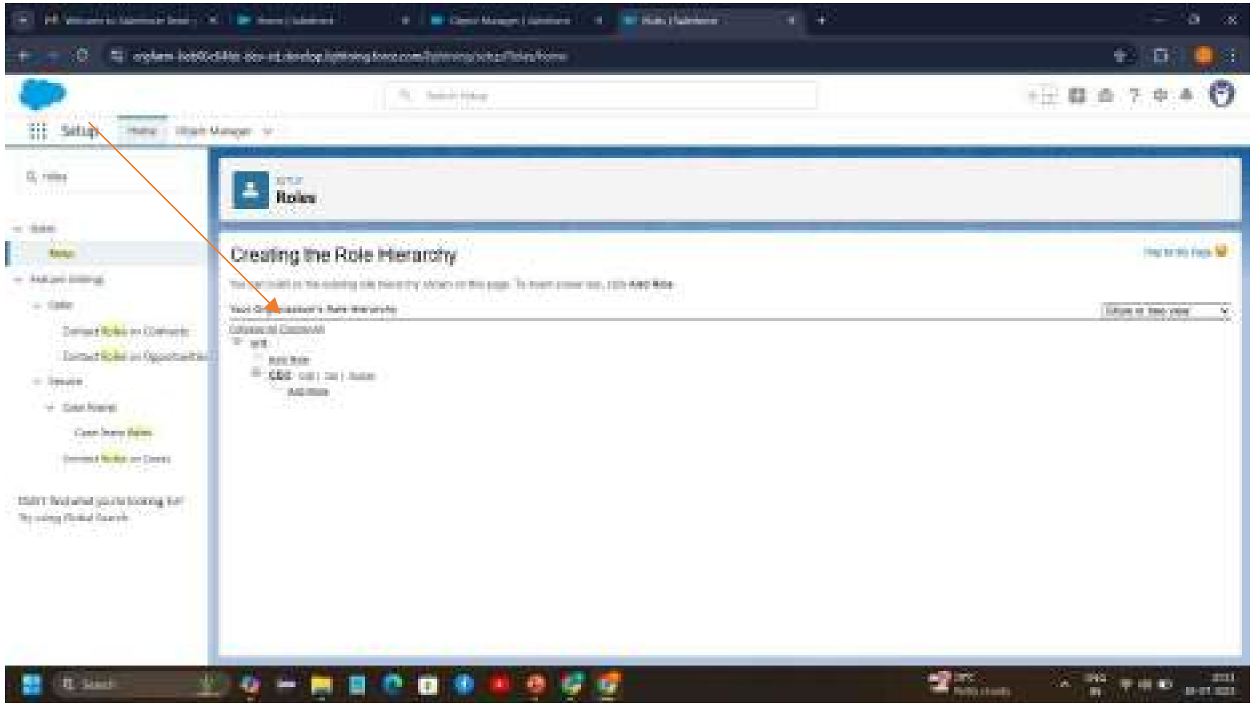
Role - Sales

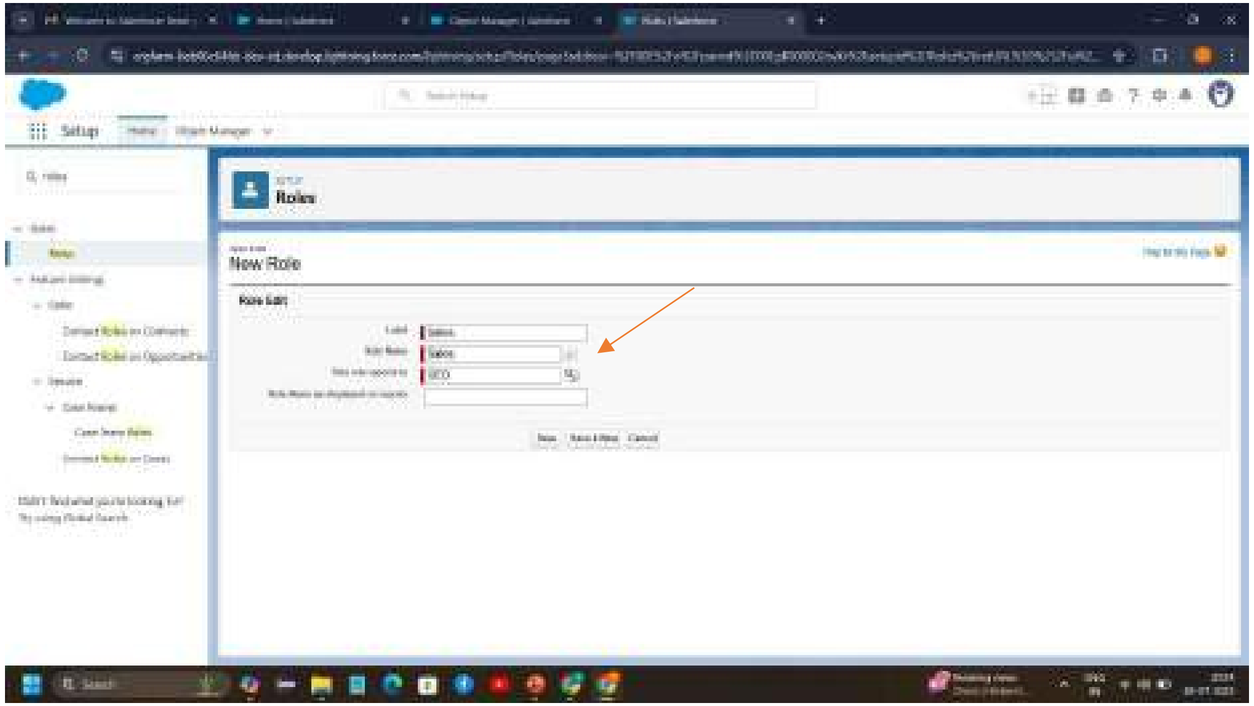
Creating Sales Manager Role:

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

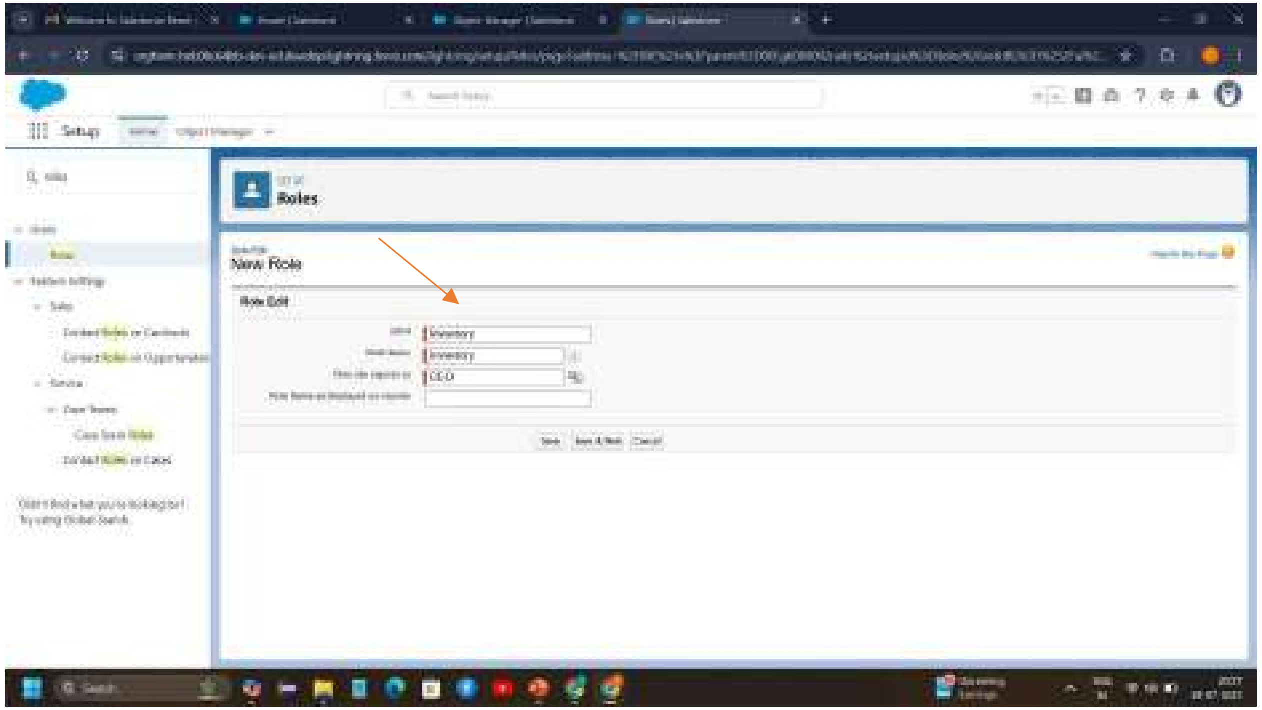


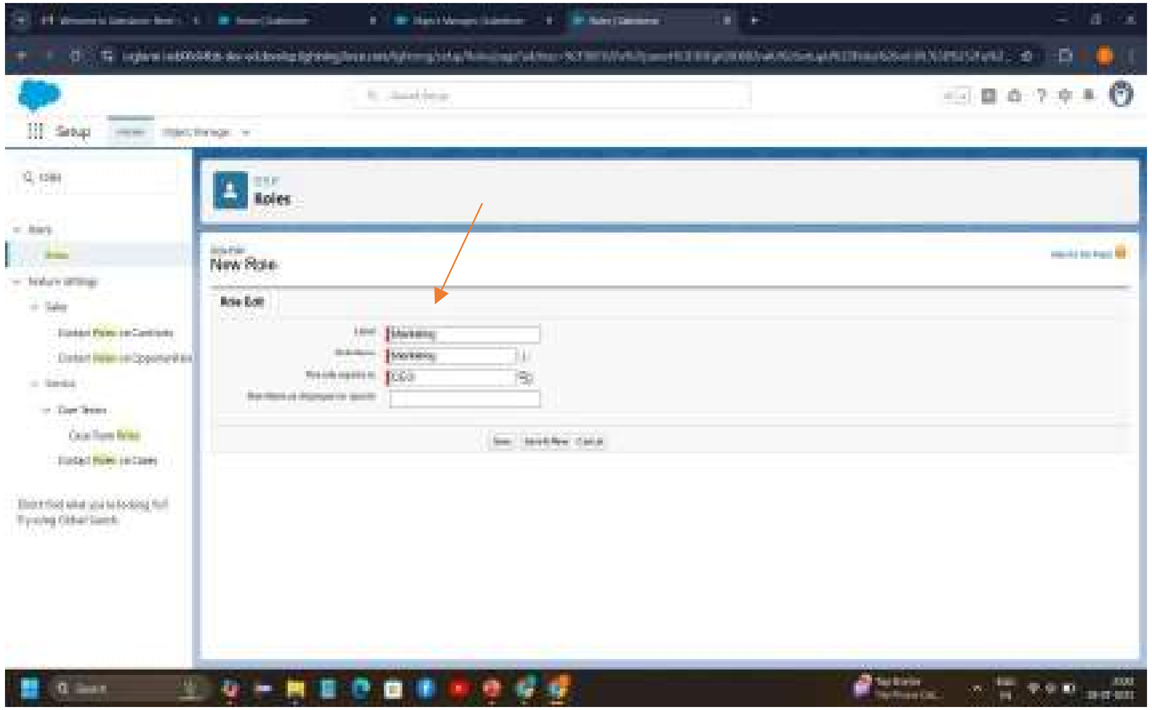
Click on Expand All and click on add role under whom this role works(Here Click Add Role Under CEO role)
Give Label as “Sales” and Role name gets auto populated. Check to whom this role (Sales) reports. Then click on Save..

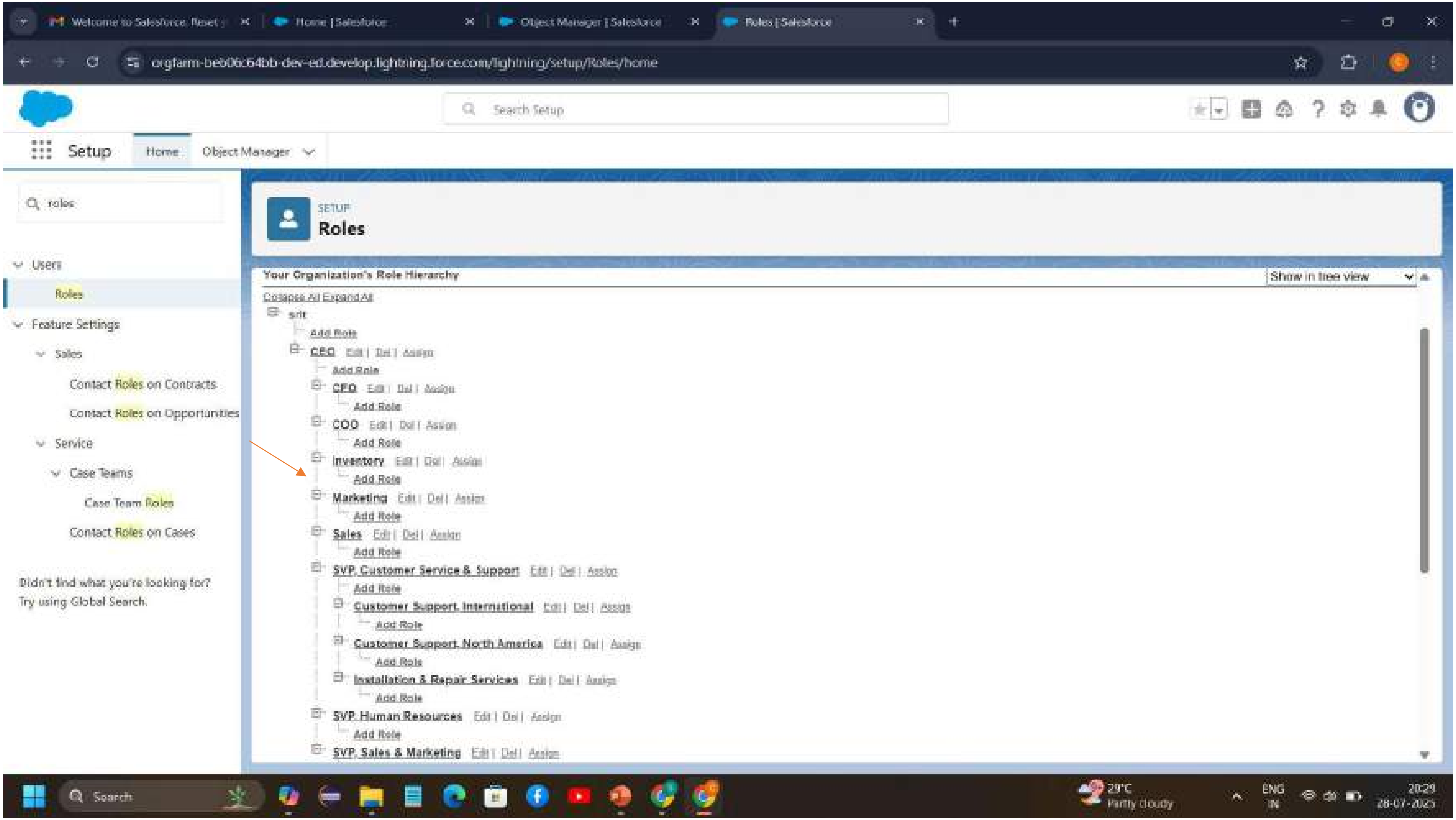




Create Roles






Welcome to Salesforce: Reset
Home | Salesforce
Object Manager | Salesforce
Roles | Salesforce
orgfarm-beb06c64bb-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home
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.
SETUP
Roles
Your Organization's Role Hierarchy
Show in tree view
Collapse All Expand All
srit
Add Role
CEO Edit | Del | Assign
Add Role
CFO 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
Search
29°C
Partly cloudy
ENG
IN
20:29
28-07-2025

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

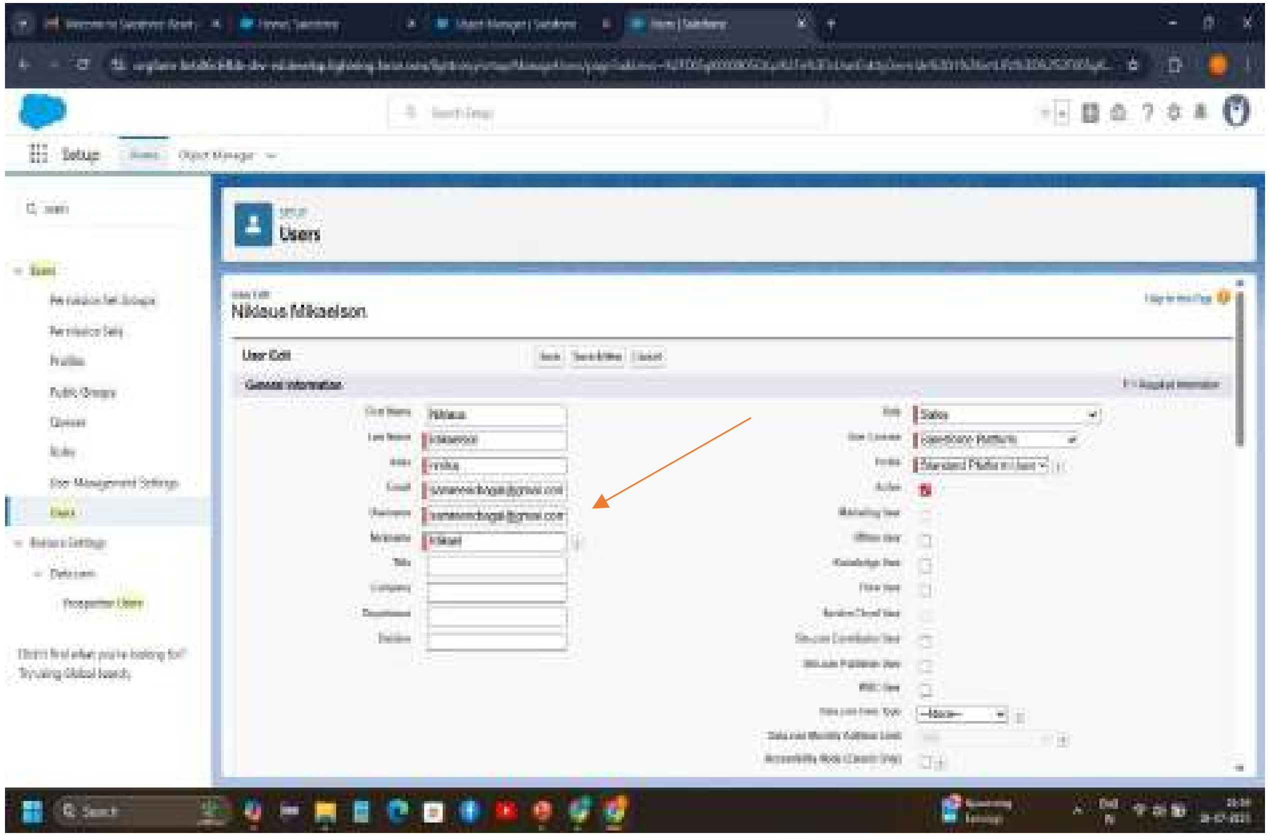
Username : Username should be in this form: text@text.text

Nick Name : Give a Nickname

Role : Sales

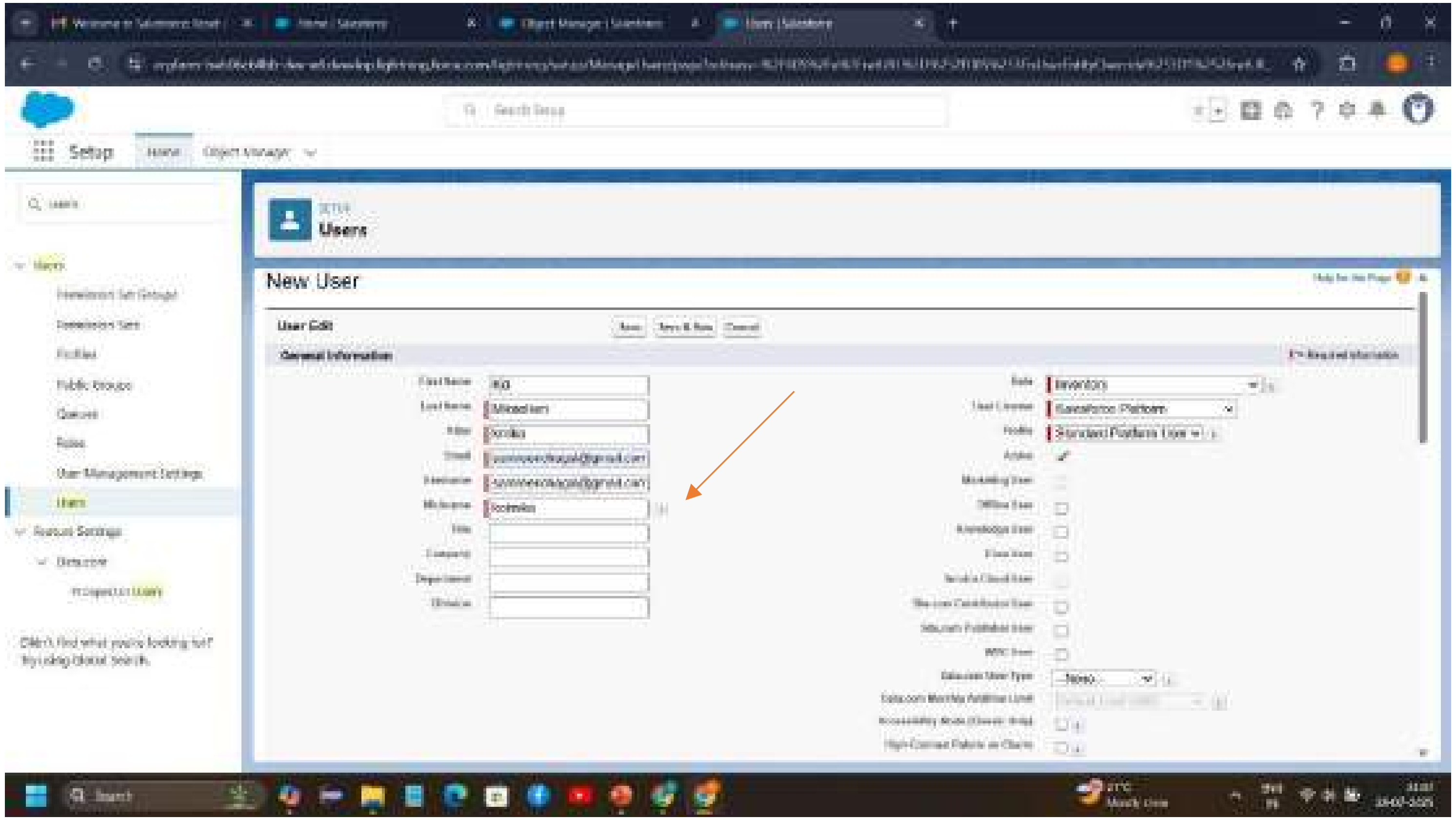
User license : Salesforce Platform

Profiles : Platform 1



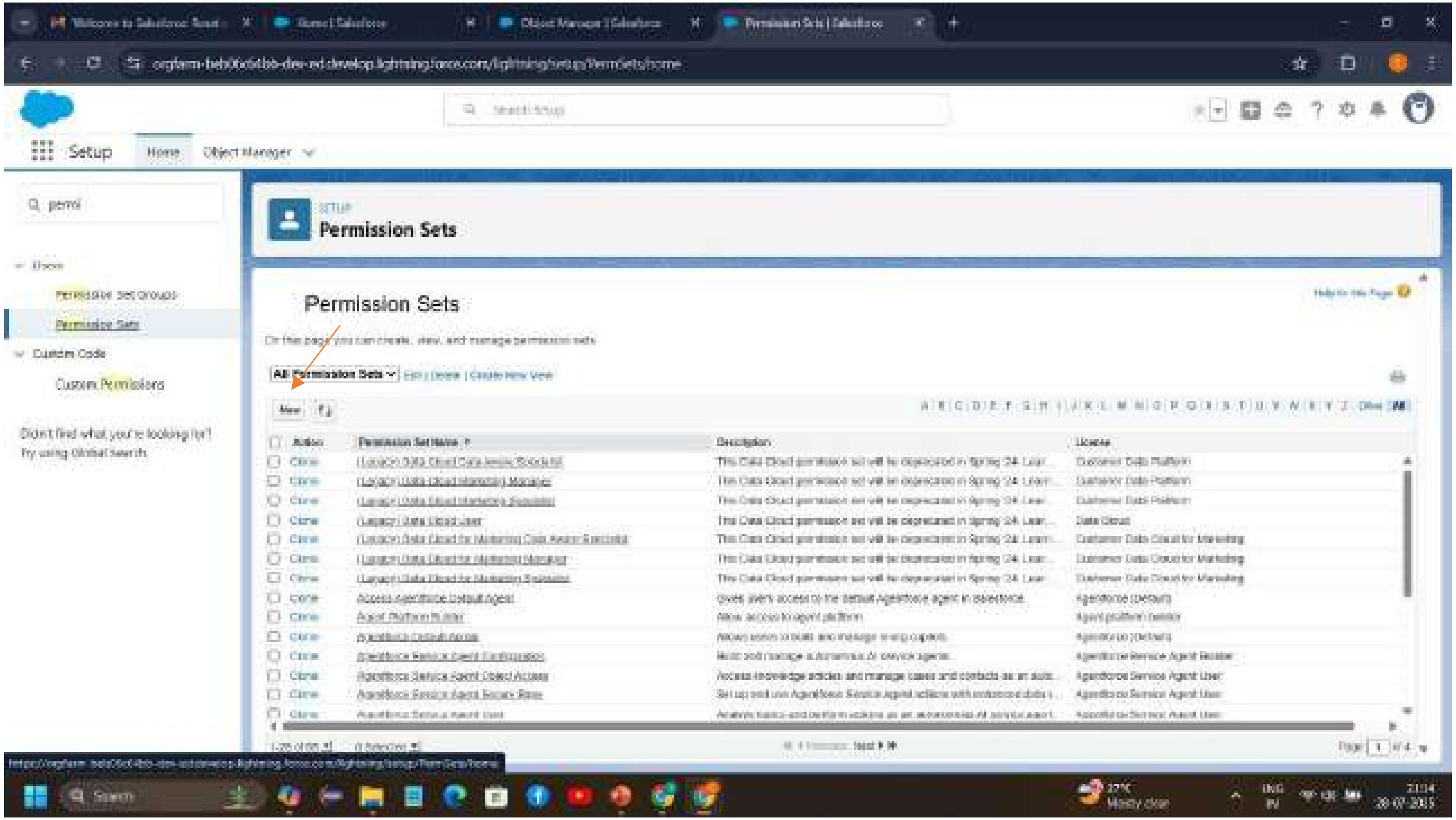
User - Kol

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.

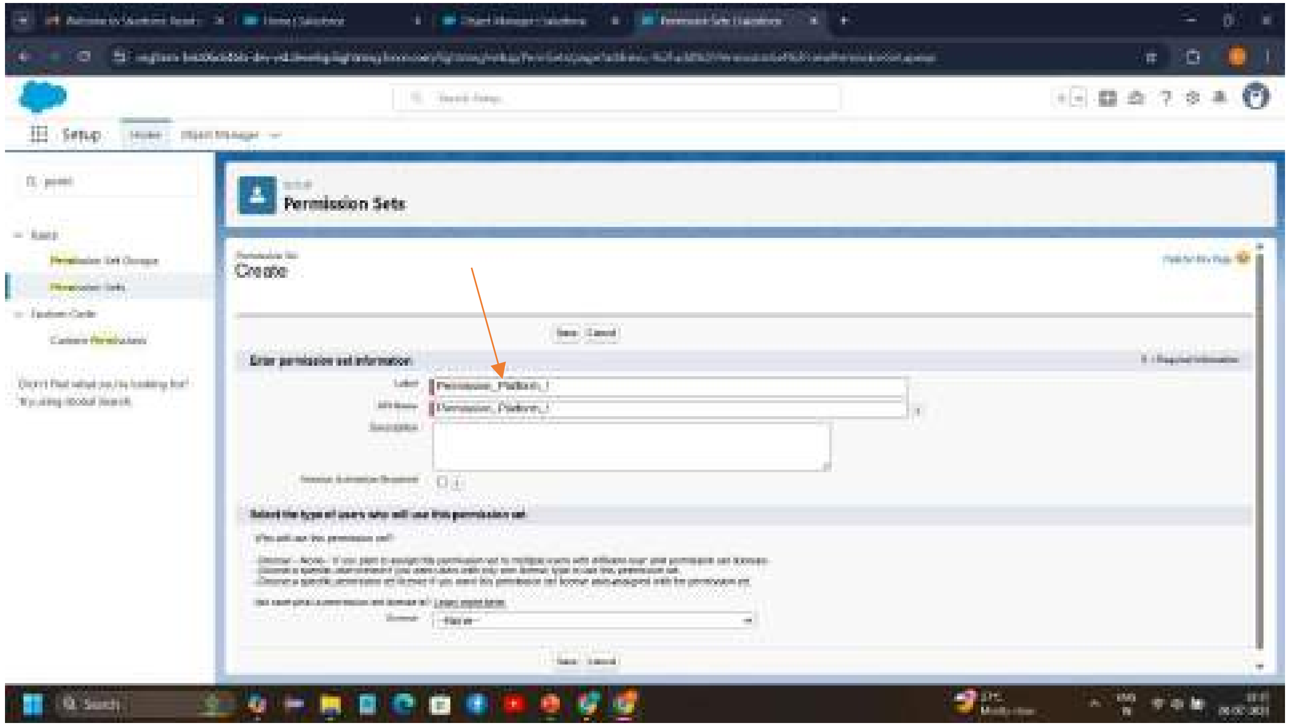


Permission set - Permission_Platform_1

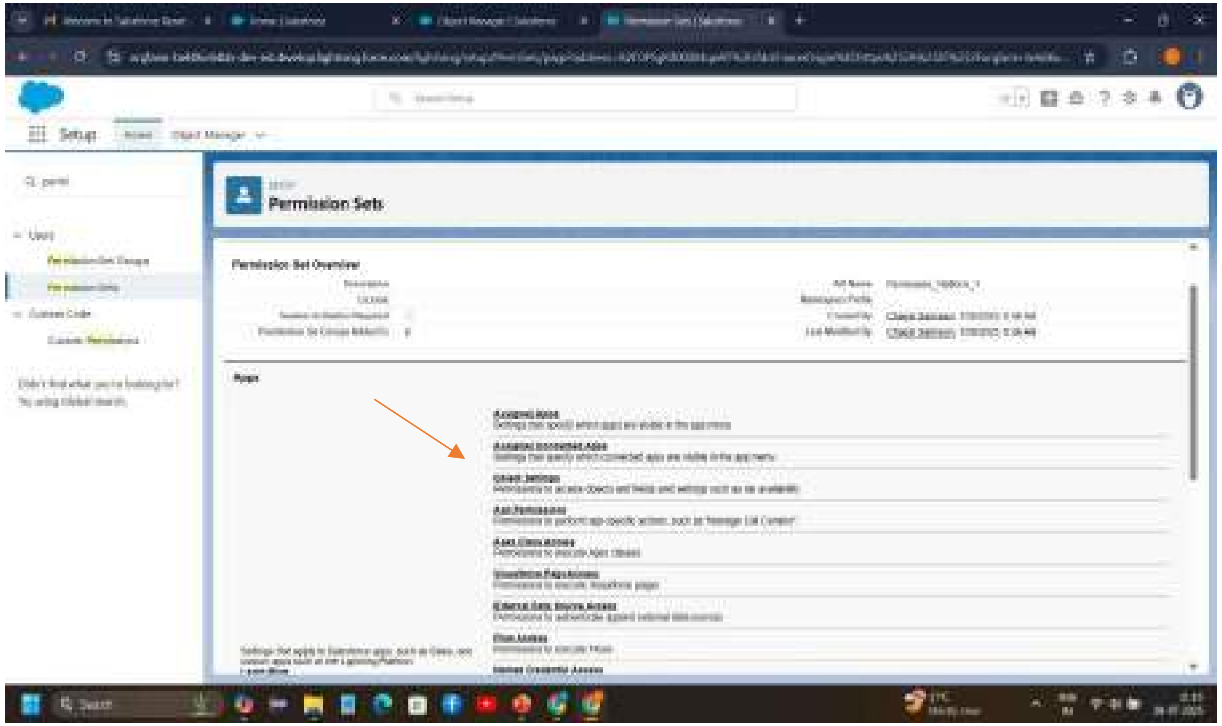
Go to setup → type “permission sets” in quick search → select permission sets → New



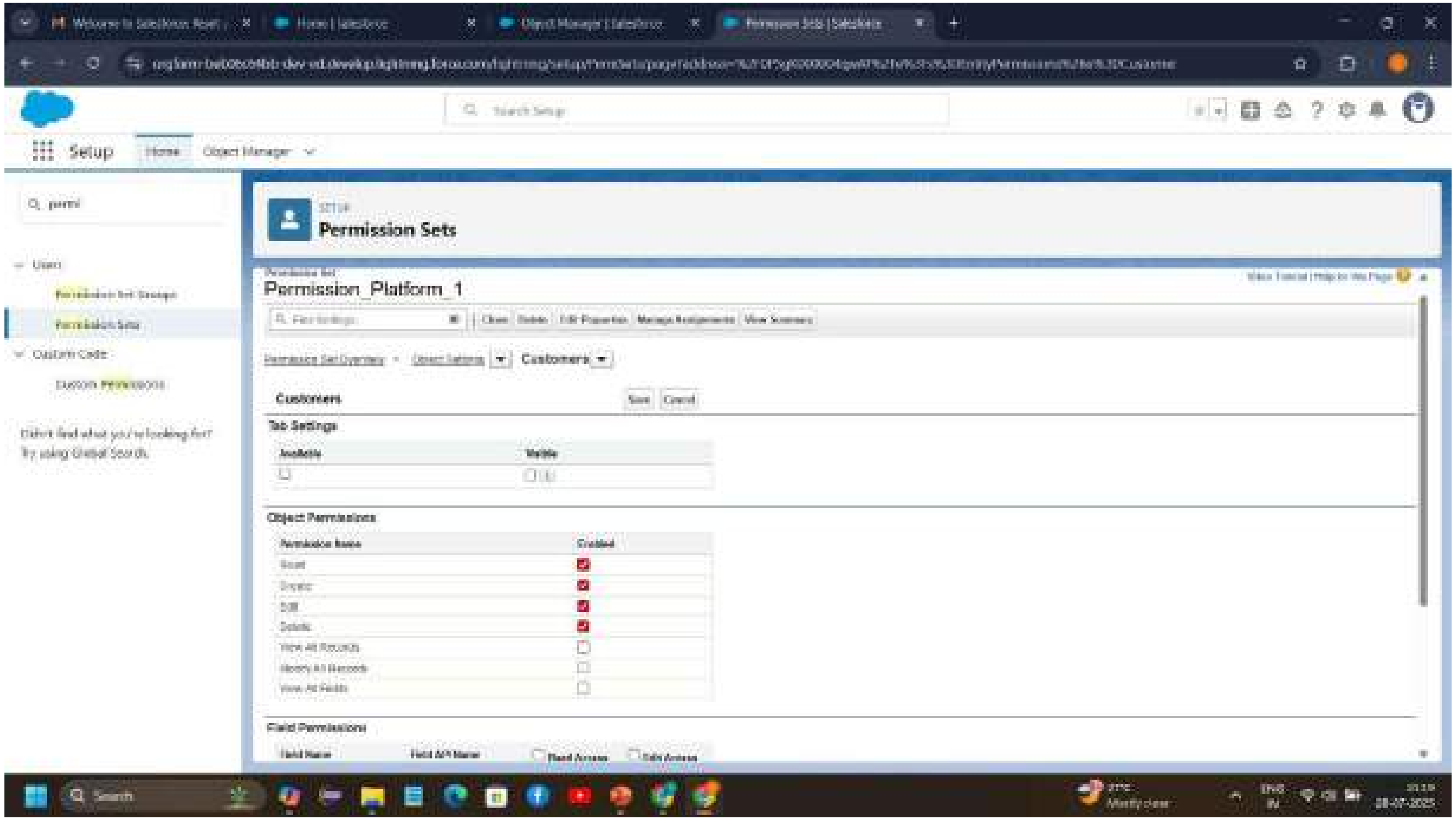
Enter the label name as “Permission_Platform_1” → save.



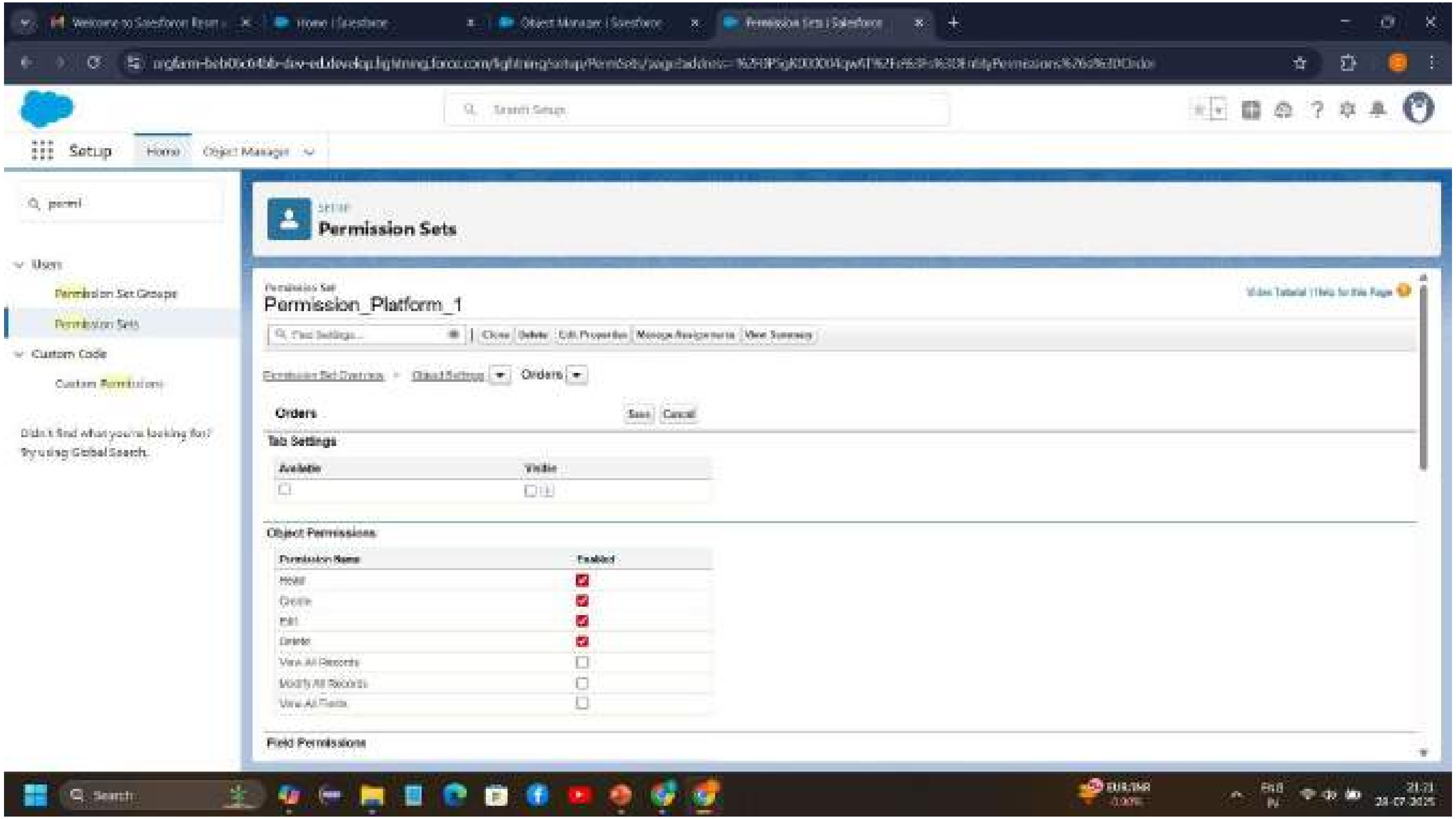
Under Apps Select object settings.



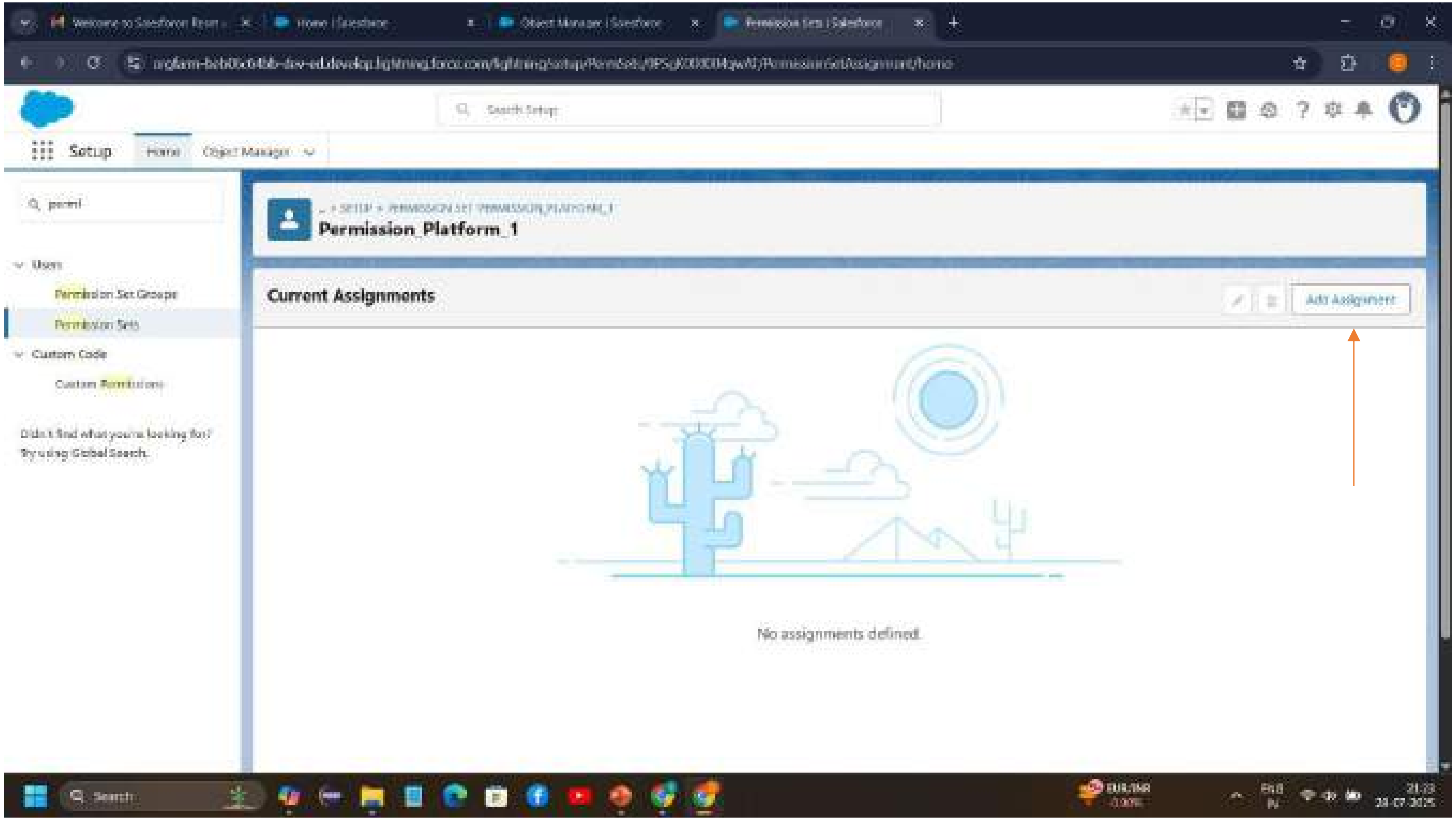
Click on Customer object → click on Edit → under object permission check for read, create, edit, delete for HandsMen Customer object.



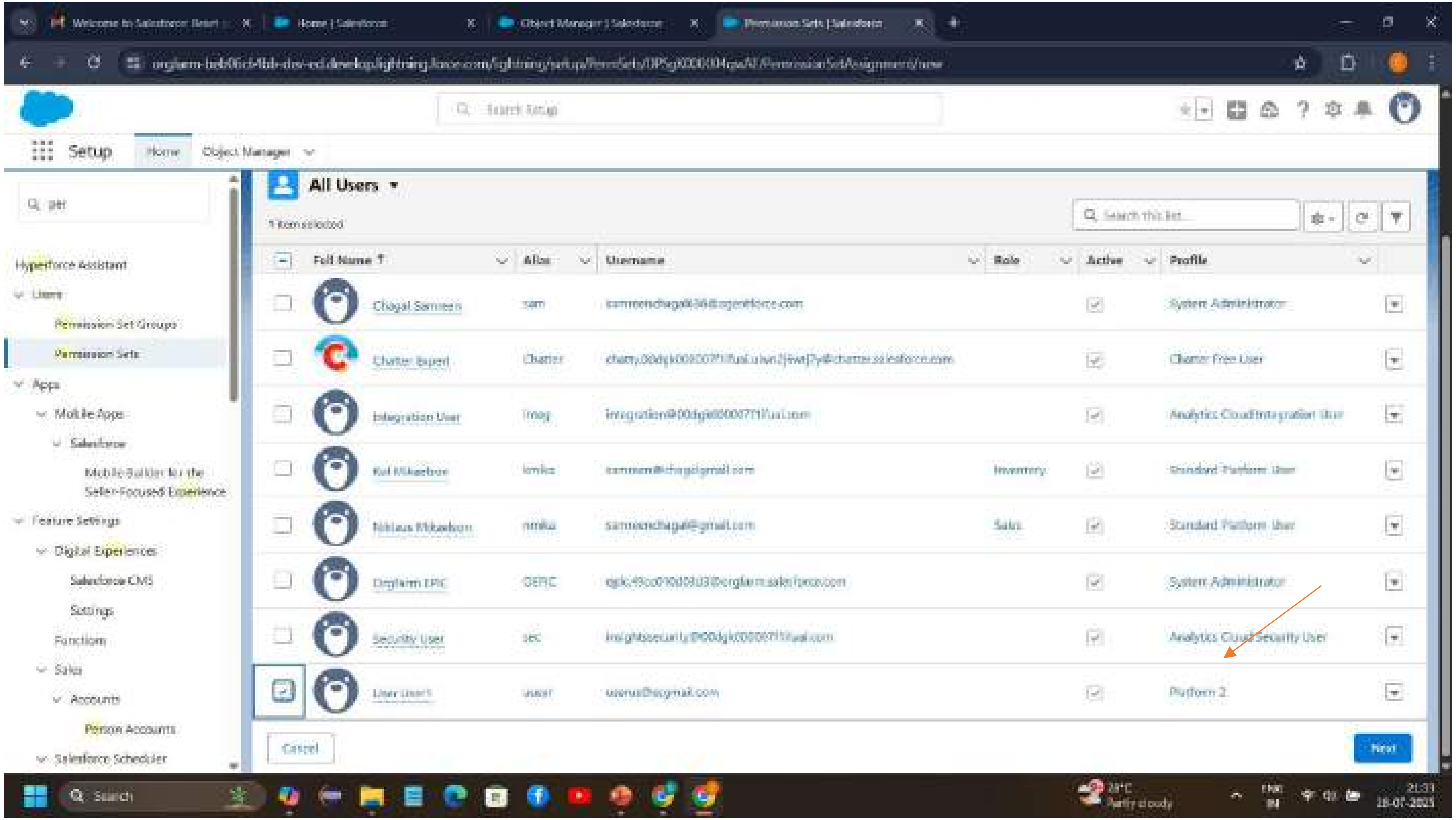
Repeat from step 3 and give permission for read, create, edit and delete on order object



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



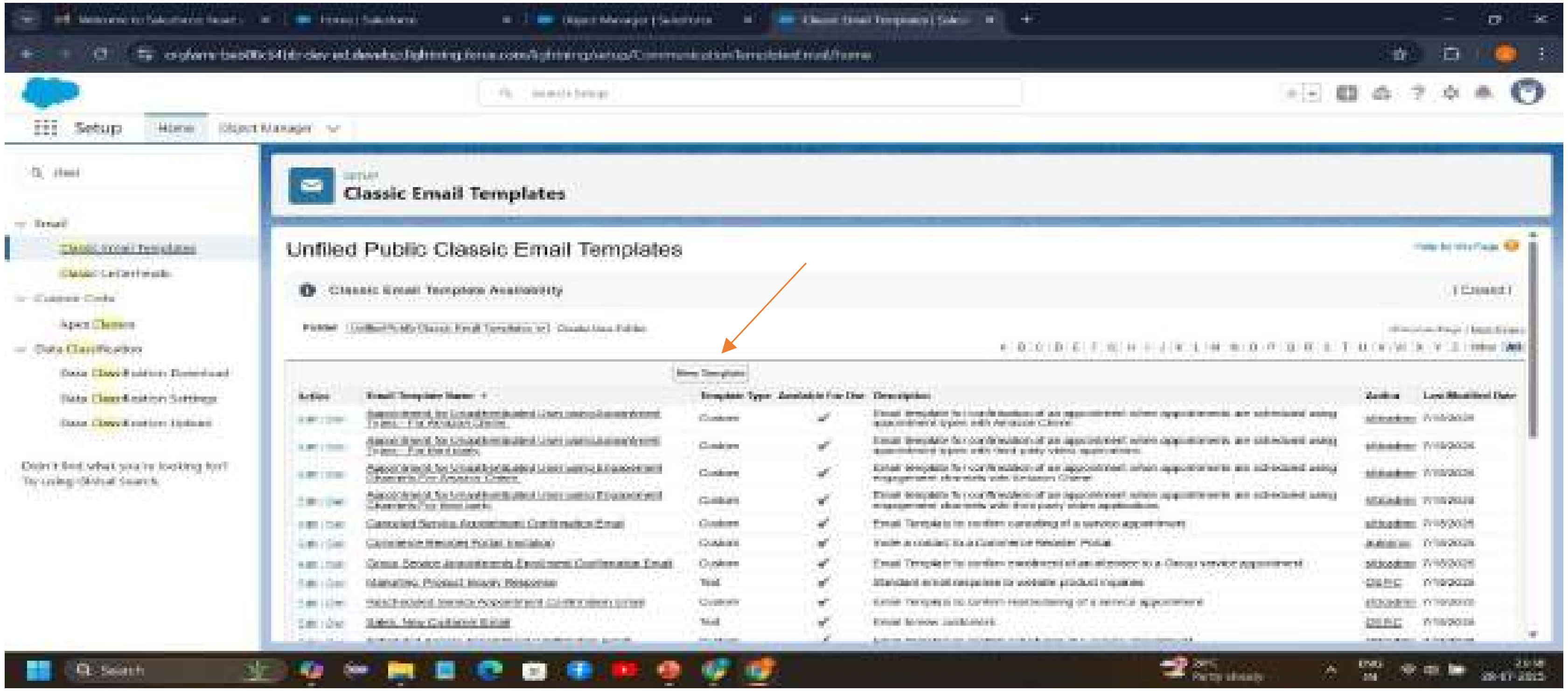
Now select the users(any one user with the profile “Platform 2”) and click on Next.
Click on Assign
Click on Done.



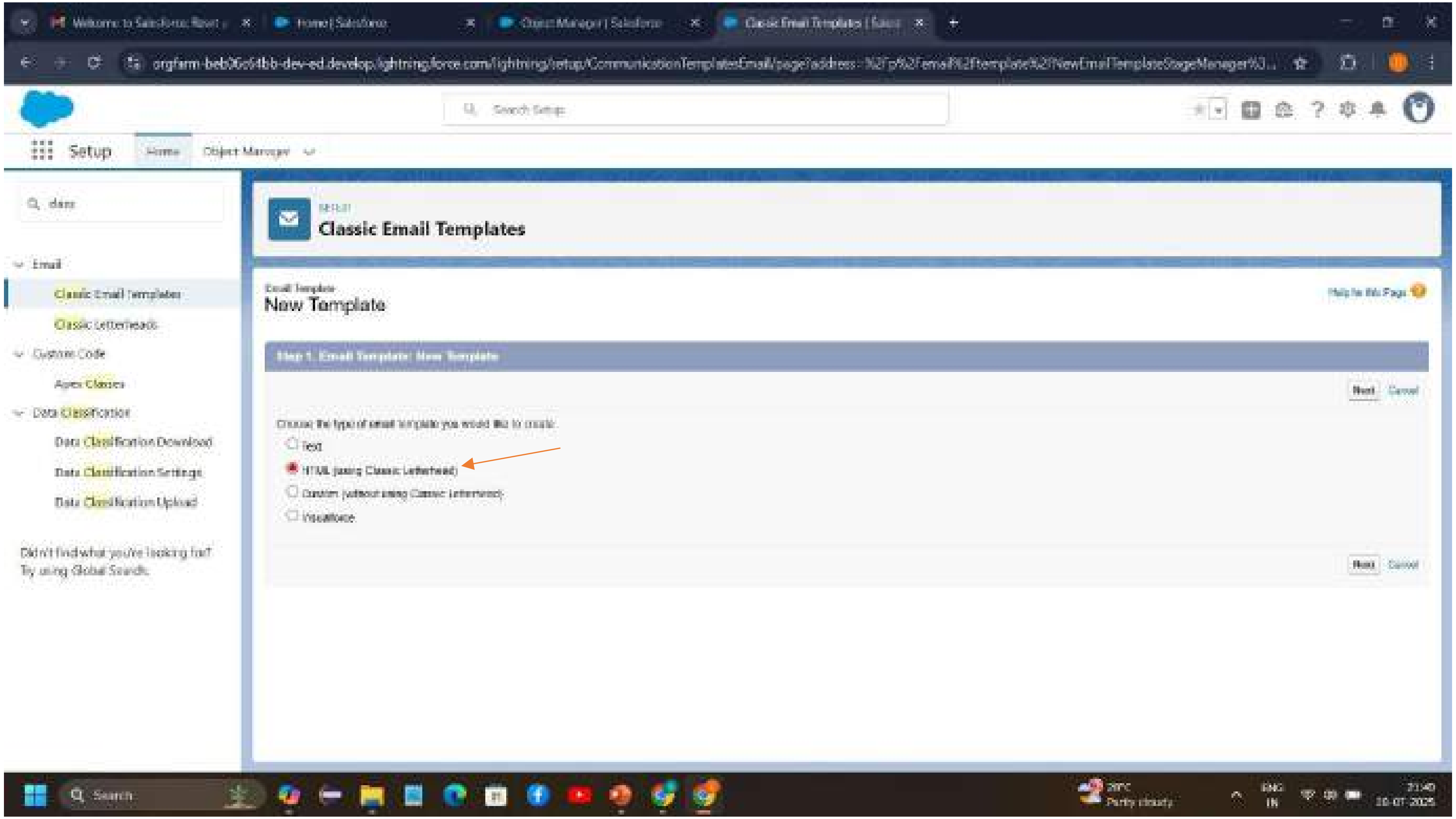
Email Template

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

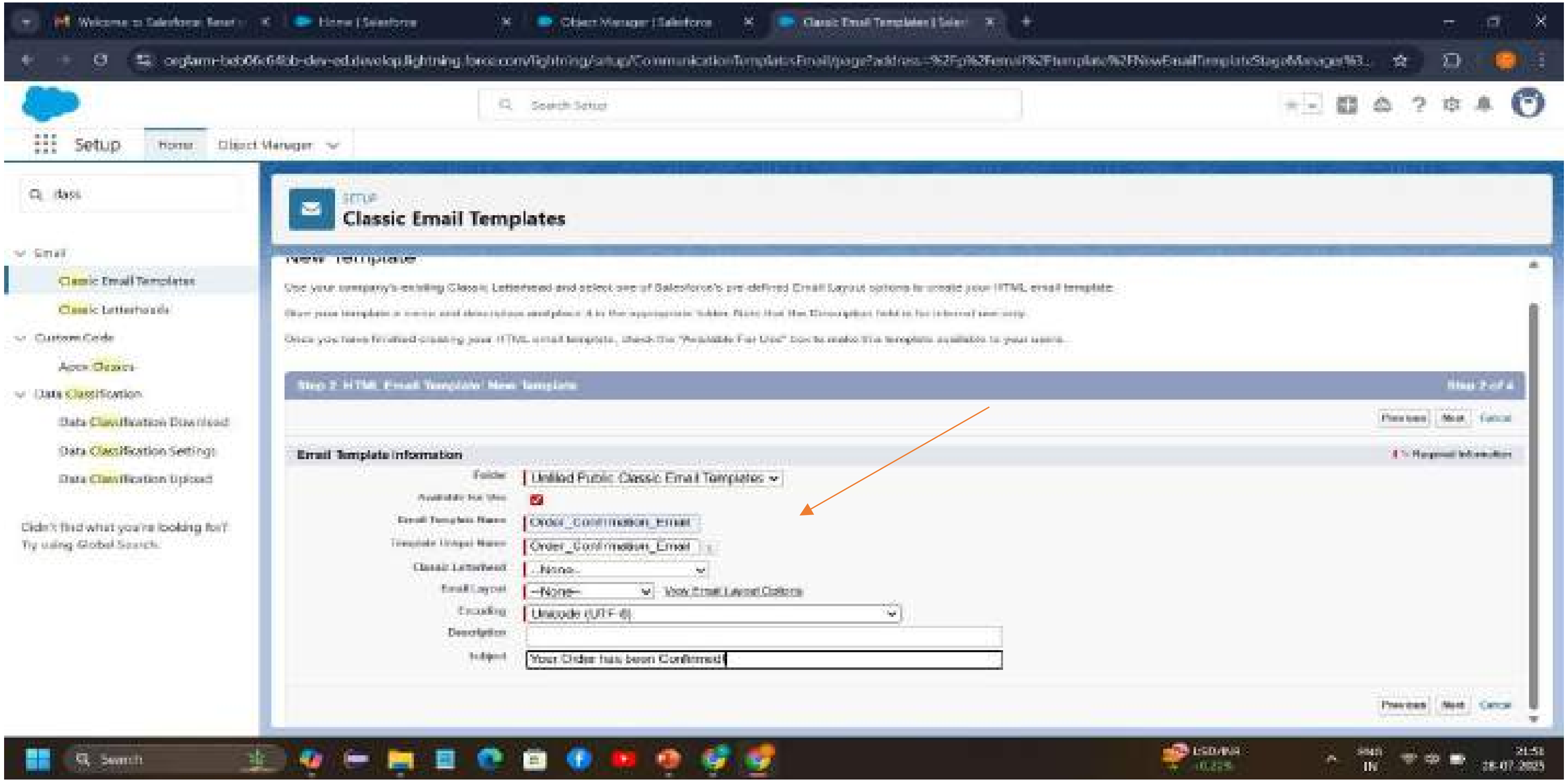
Folder: Select "Unfiled Public Email Templates" (or create a new folder).

Available for Use: ✅ (Check this box)

Email Template Name: Order_Confirmation_Email (or appropriate name).

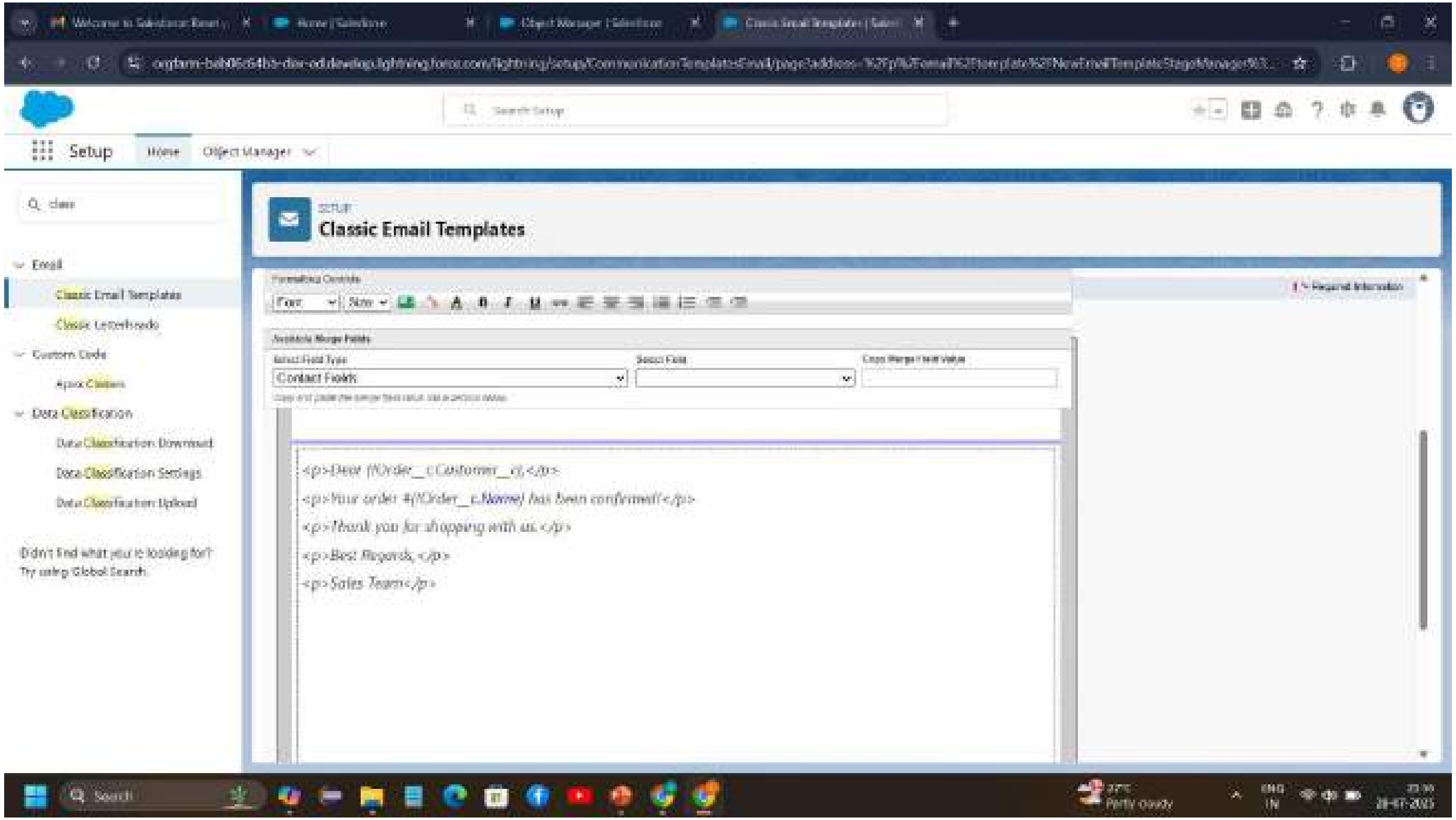
Encoding: UTF-8 (default).

Subject: Your Order has been Confirmed!!

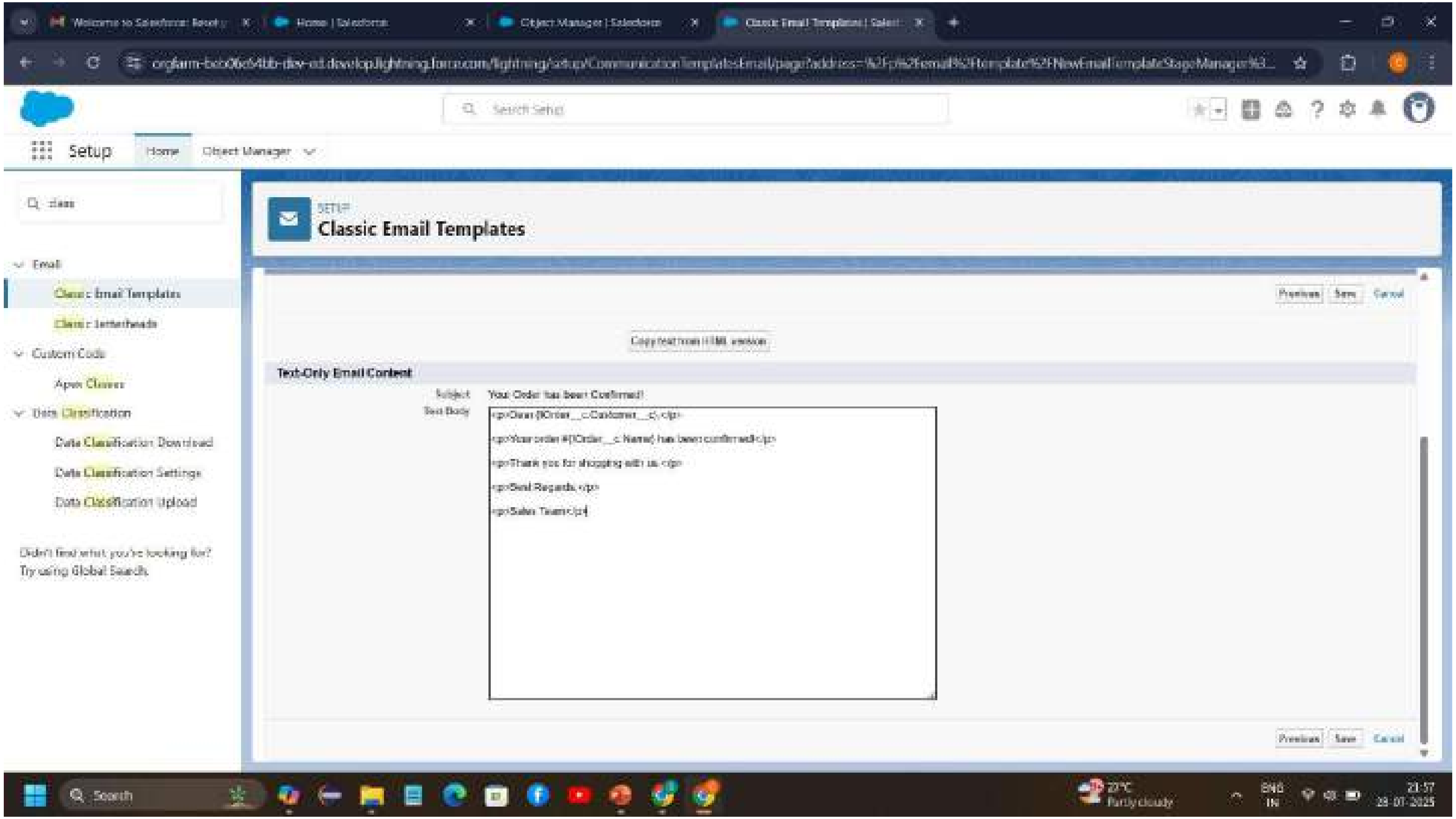


HTML Body:

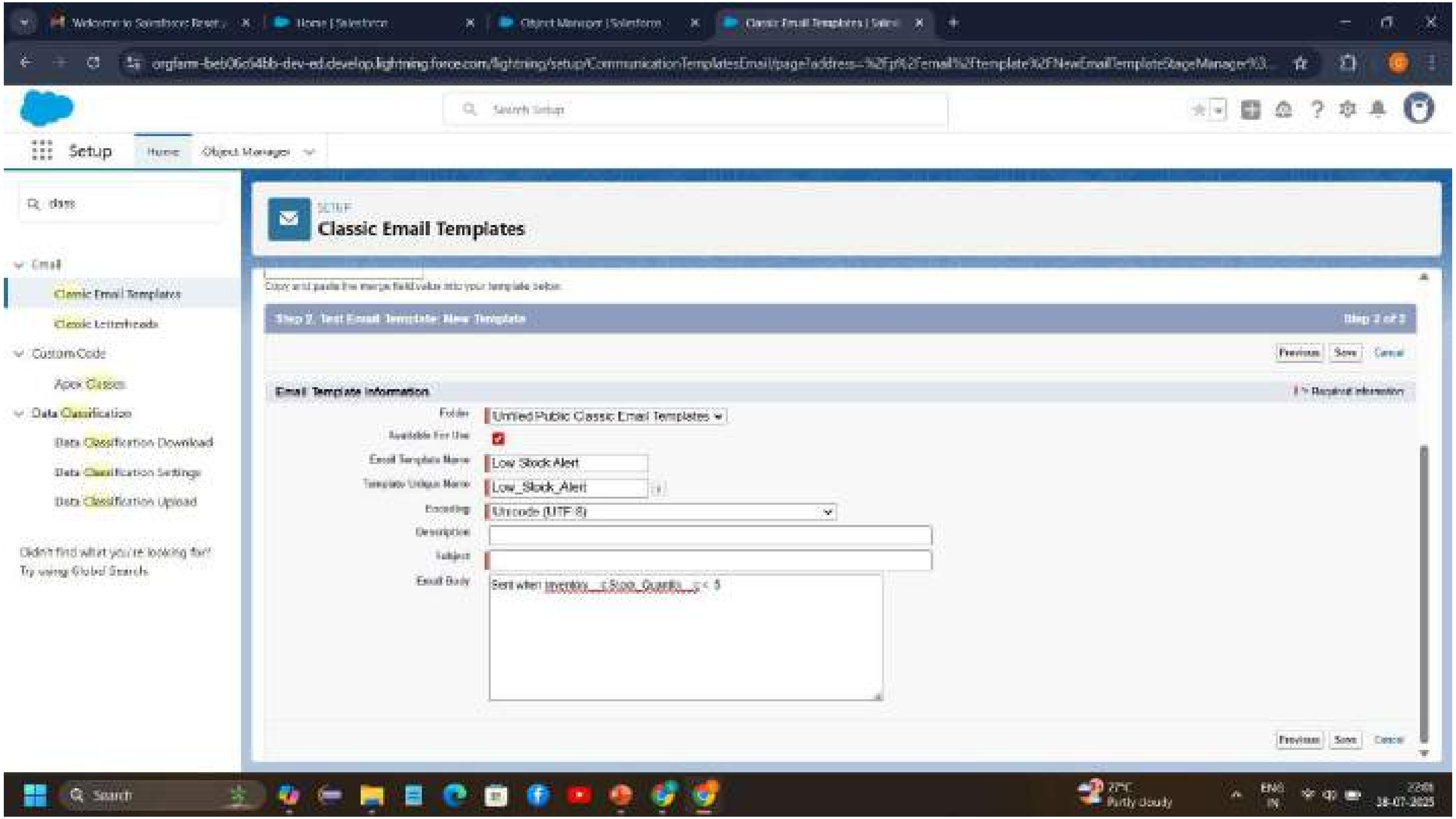
<p>Dear {!Order__c.Customer__c},</p>
<p>Your order #{!Order__c.Name} has been confirmed!</p>
<p>Thank you for shopping with us.</p>
<p>Best Regards,</p>
<p>Sales Team</p>



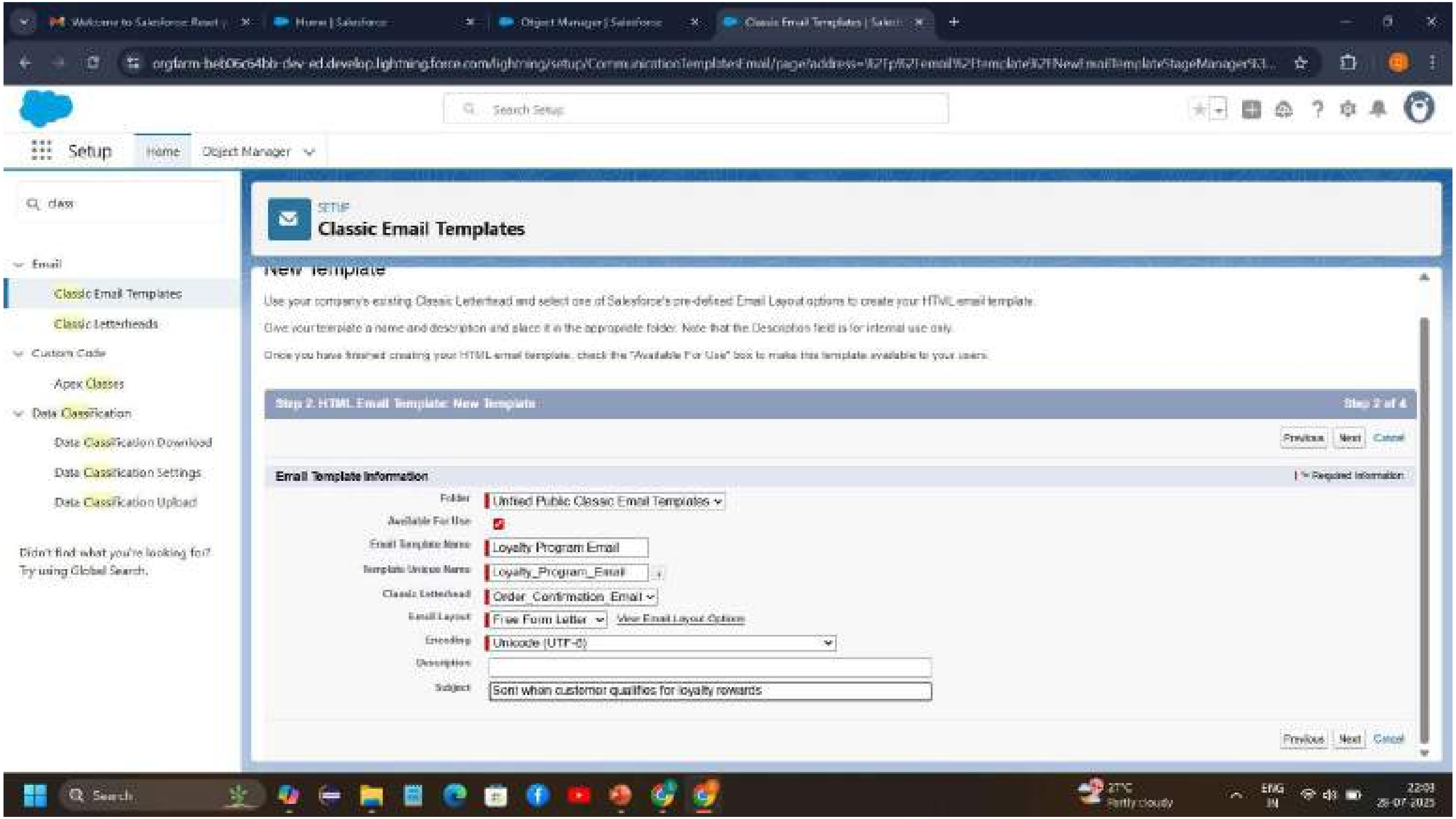
Save the Template.



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



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



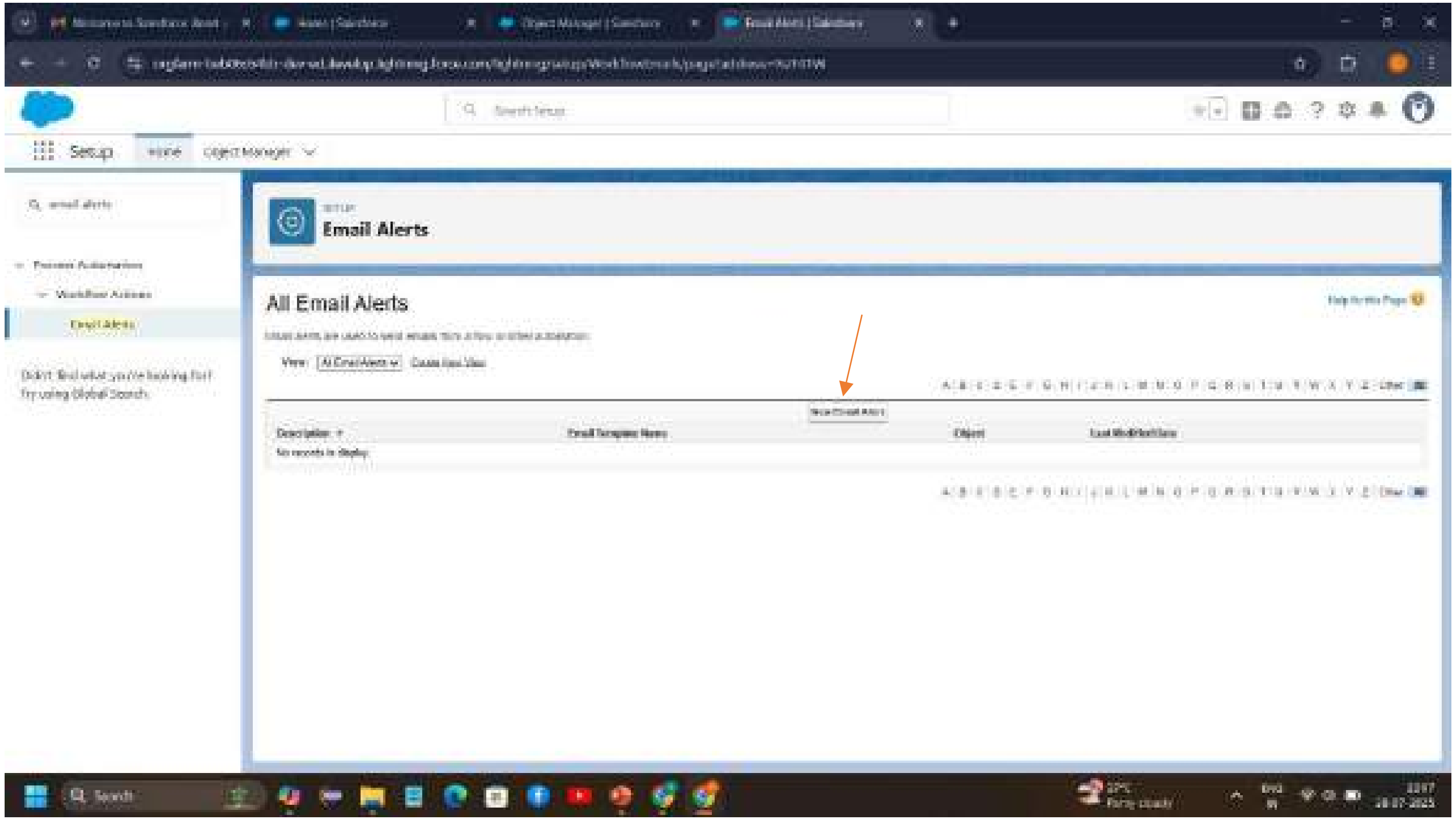
Create an Email Alert

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

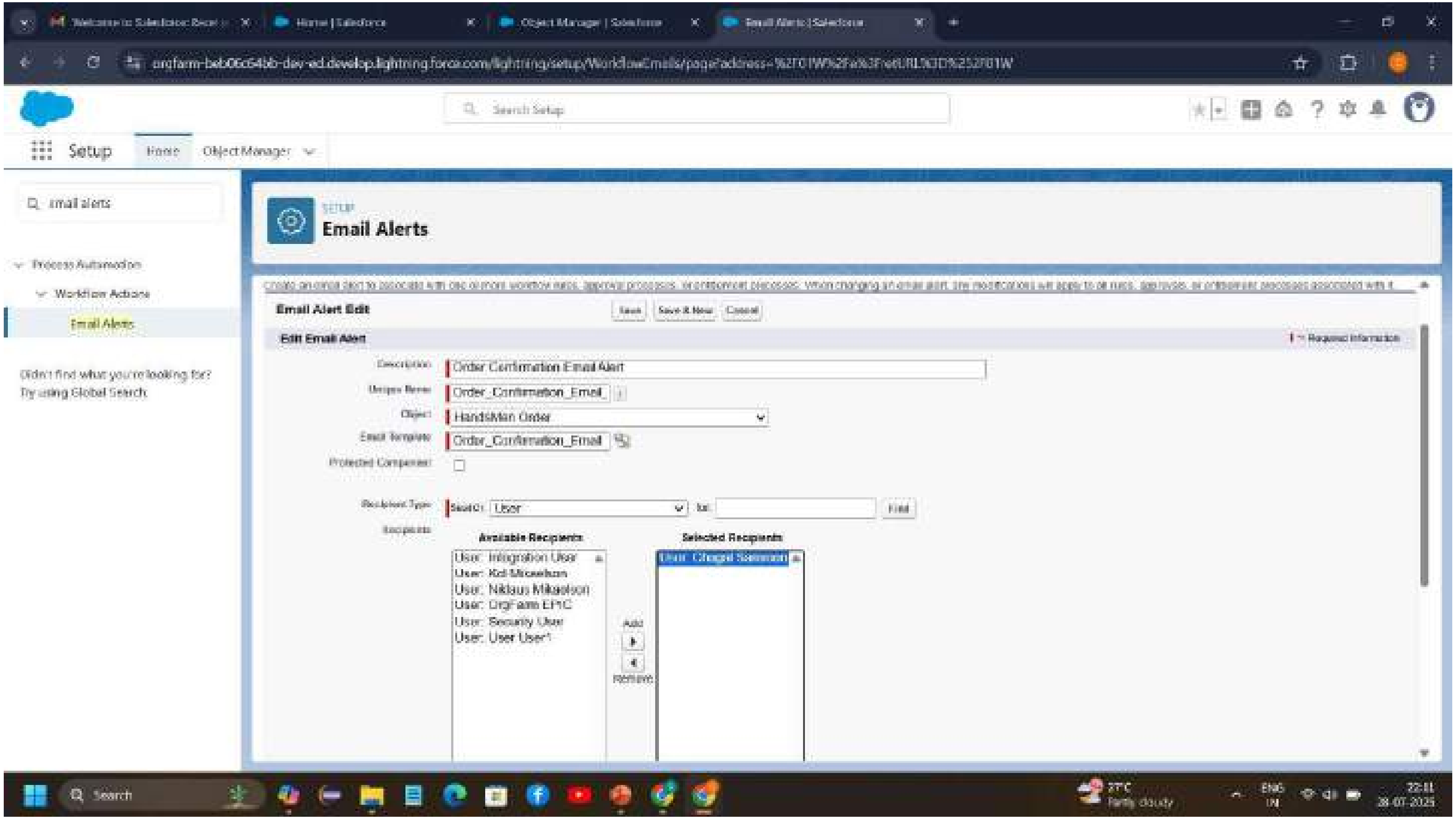
Steps to Create an Email Alert

Go to Setup

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



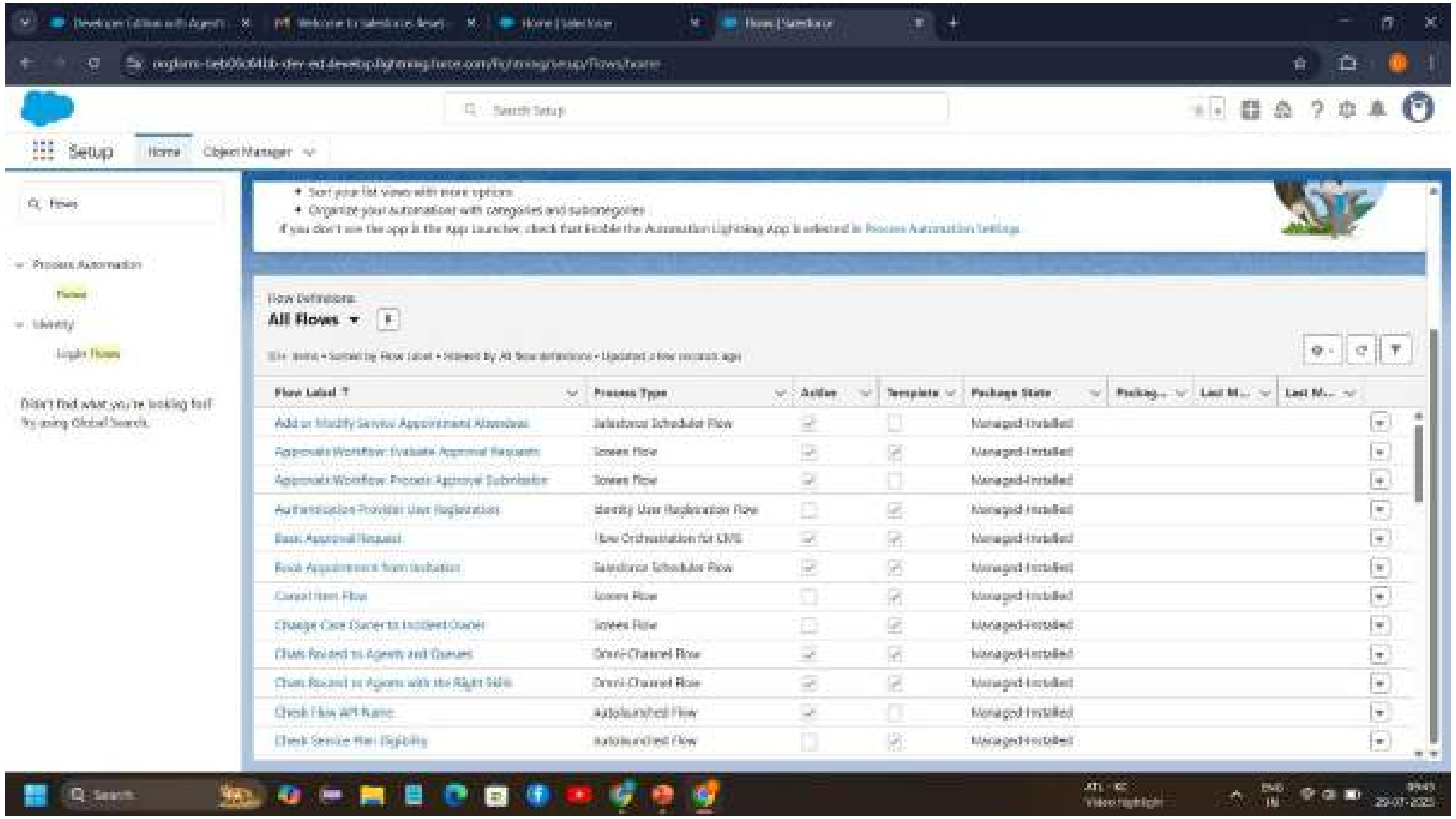
Description: Order Confirmation Email Alert
Object: Order__c
Email Template: Select the one created earlier.
Save the email alert.



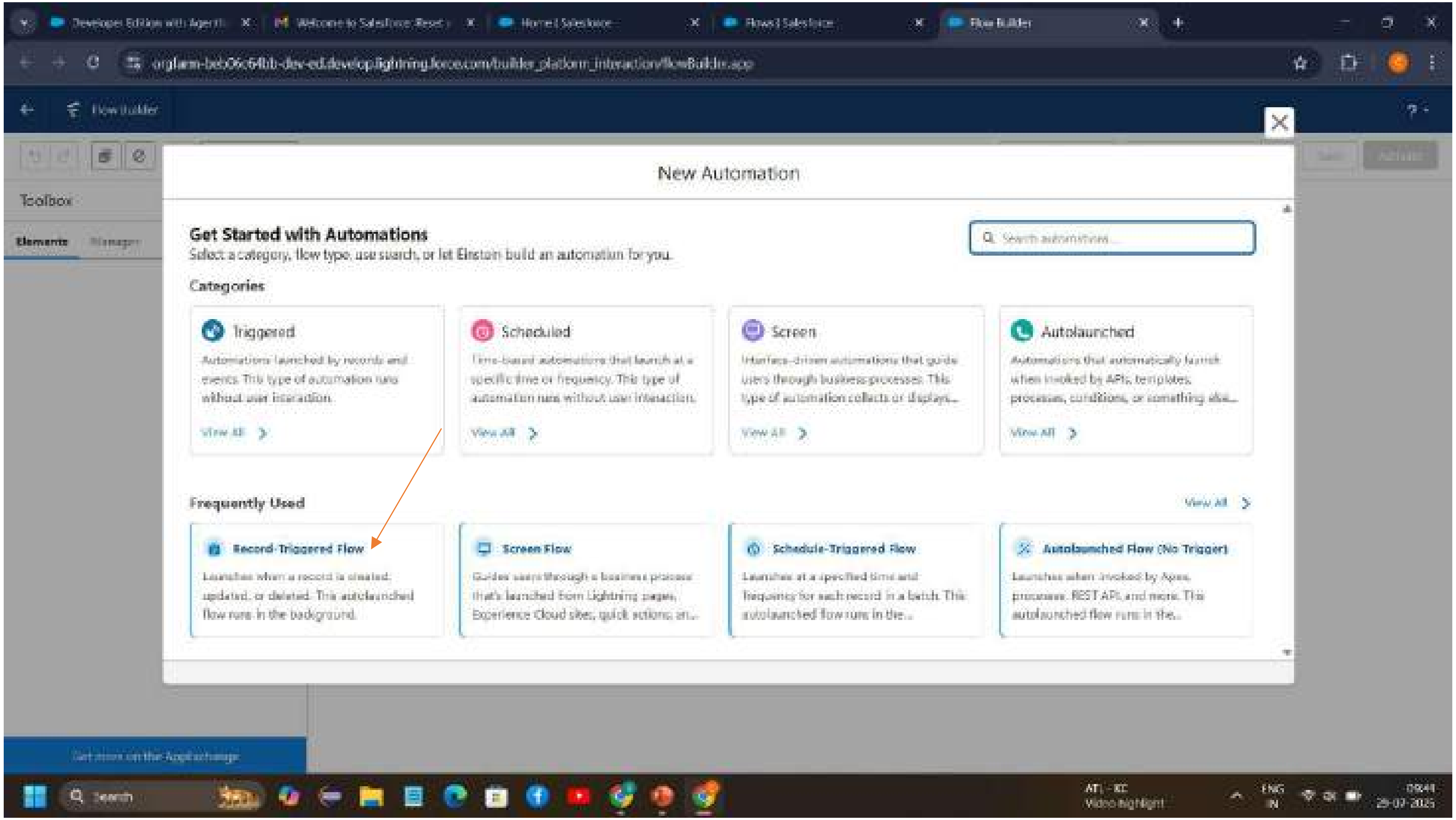
Flows

Create Order Confirmation Email

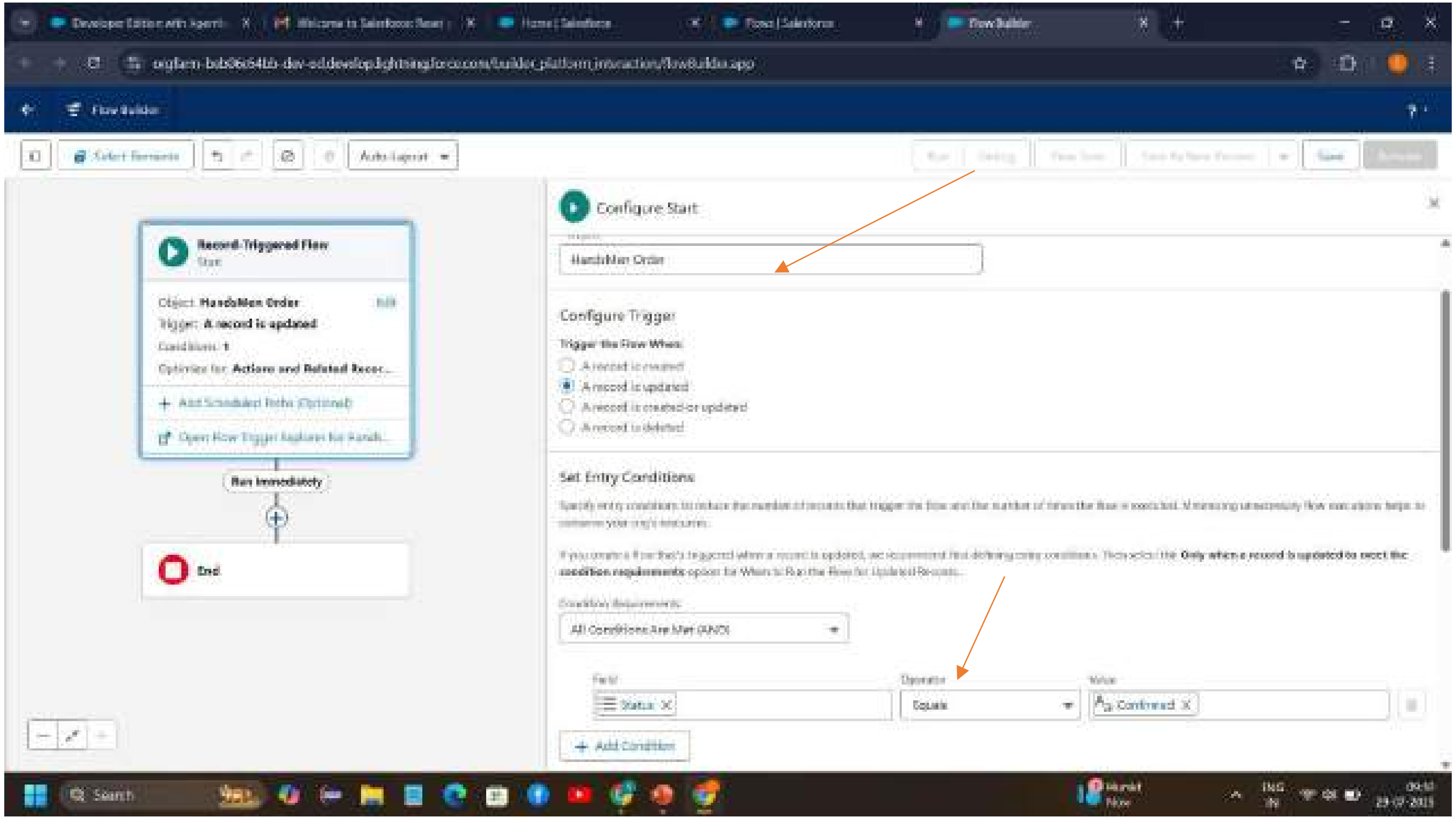
Order Confirmation Email (Record-Triggered)
Go to Setup → Flow
In Quick Find, search for Flows and click on it



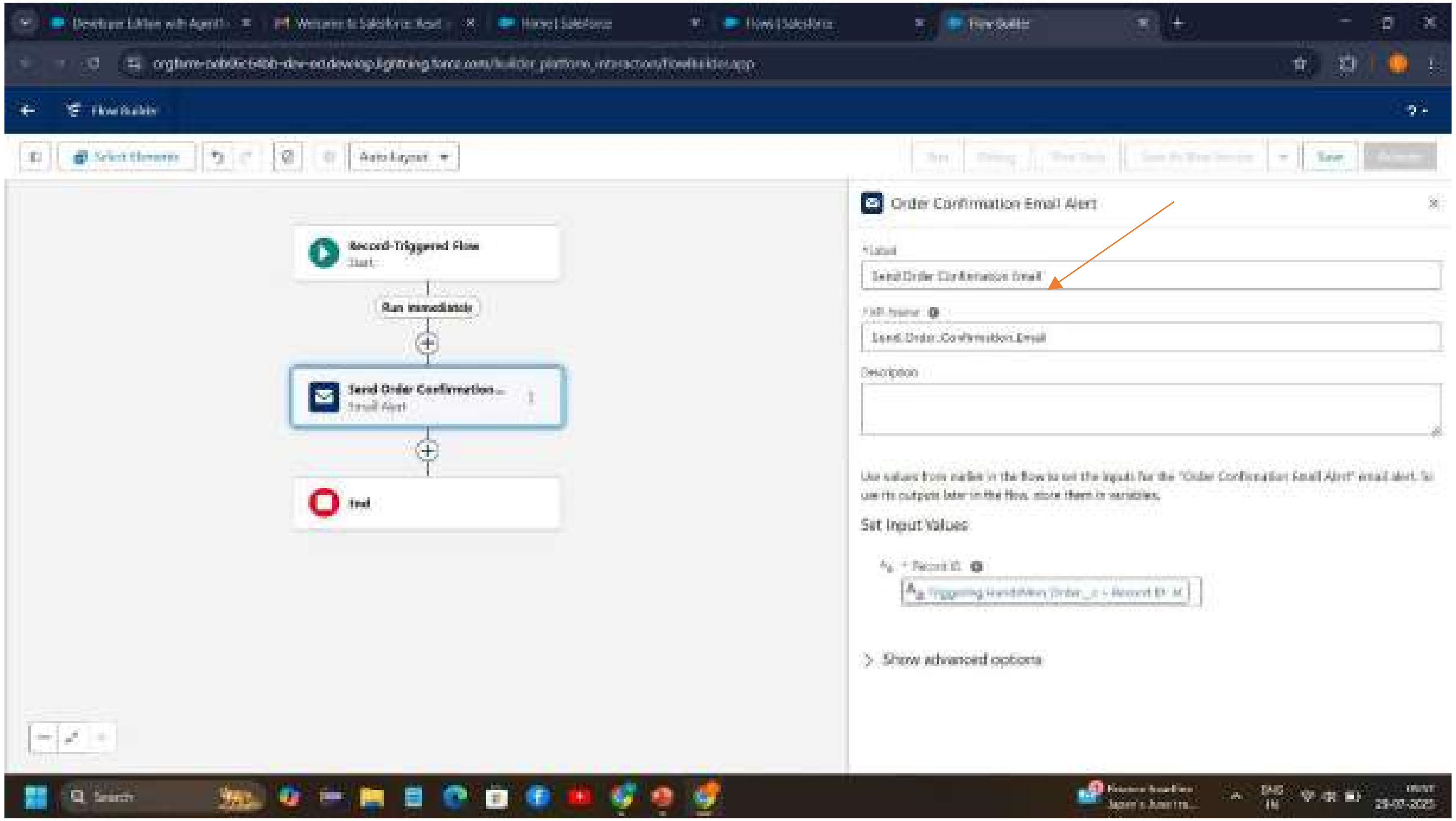
Click New Flow → Select Record-Triggered Flow → Click Create.



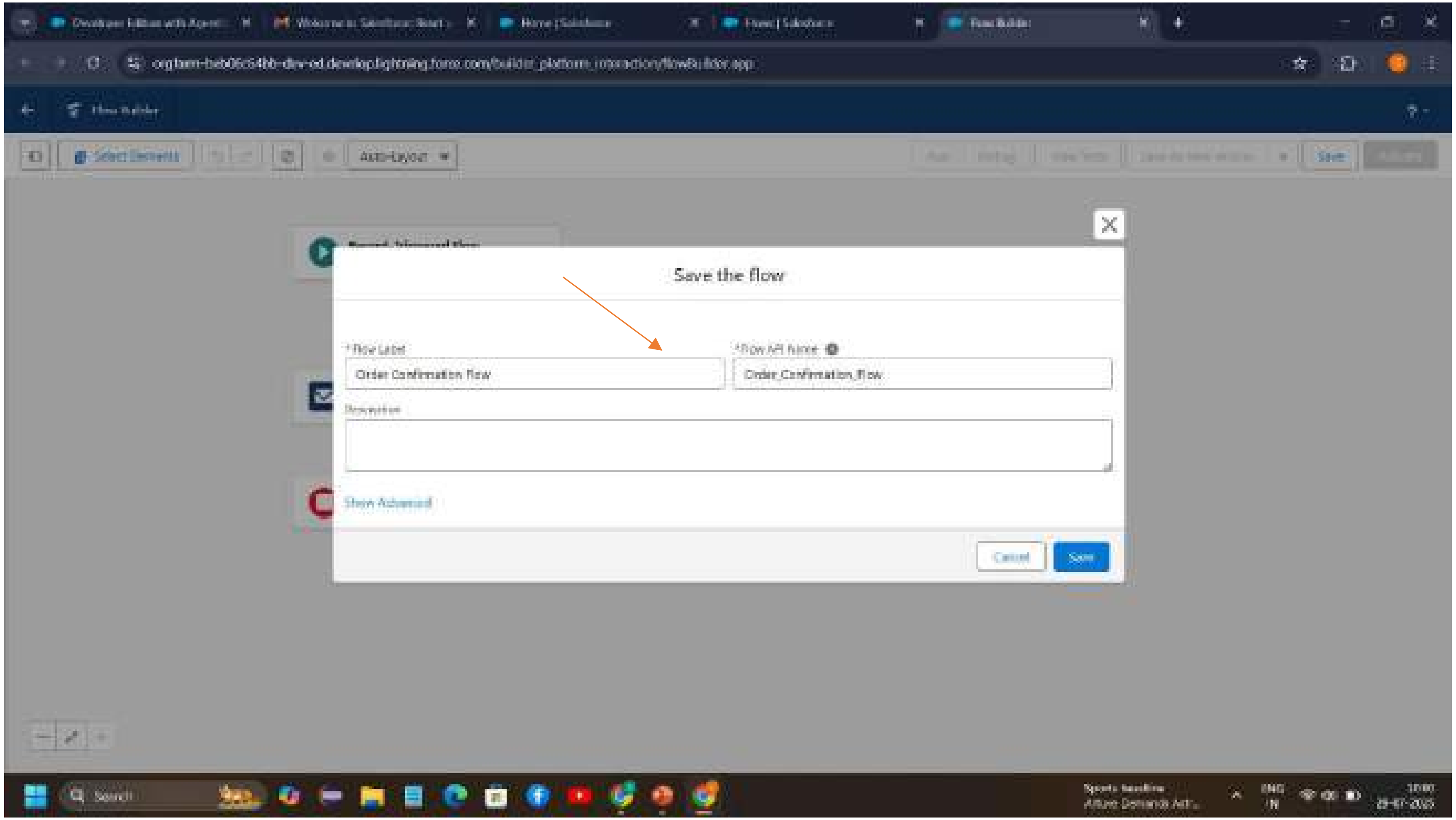
Set Flow Trigger Details
Object: Order__c
Trigger: When a record is updated
Condition:
Field: Order__c.Status__c = "Confirmed"
Select Only when a record is updated to meet the condition



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.

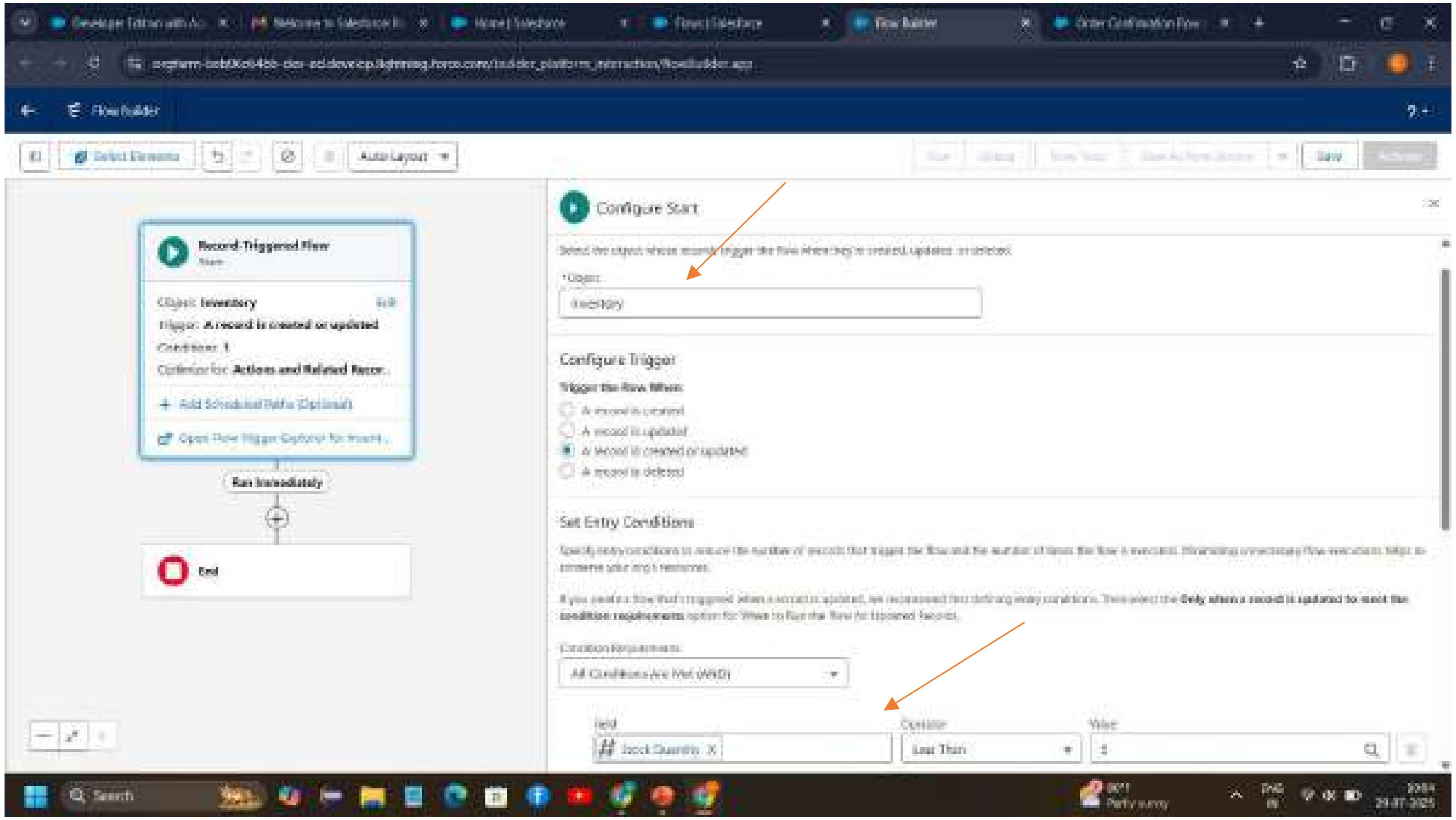


Save & Activate the Flow
Name: Order Confirmation Flow
Click Save → Activate.

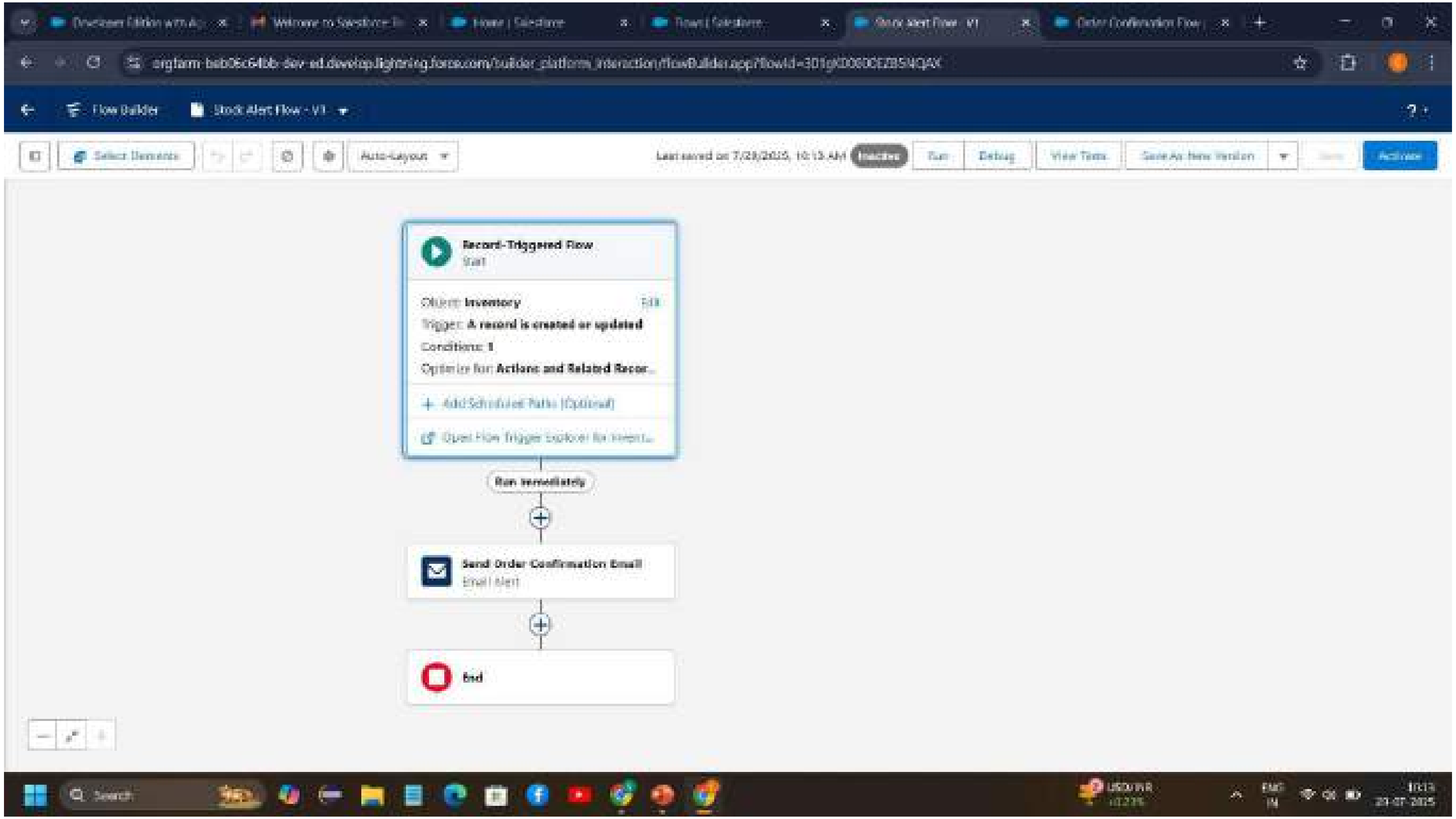


Create Stock Alert Email (Record-Triggered)

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.

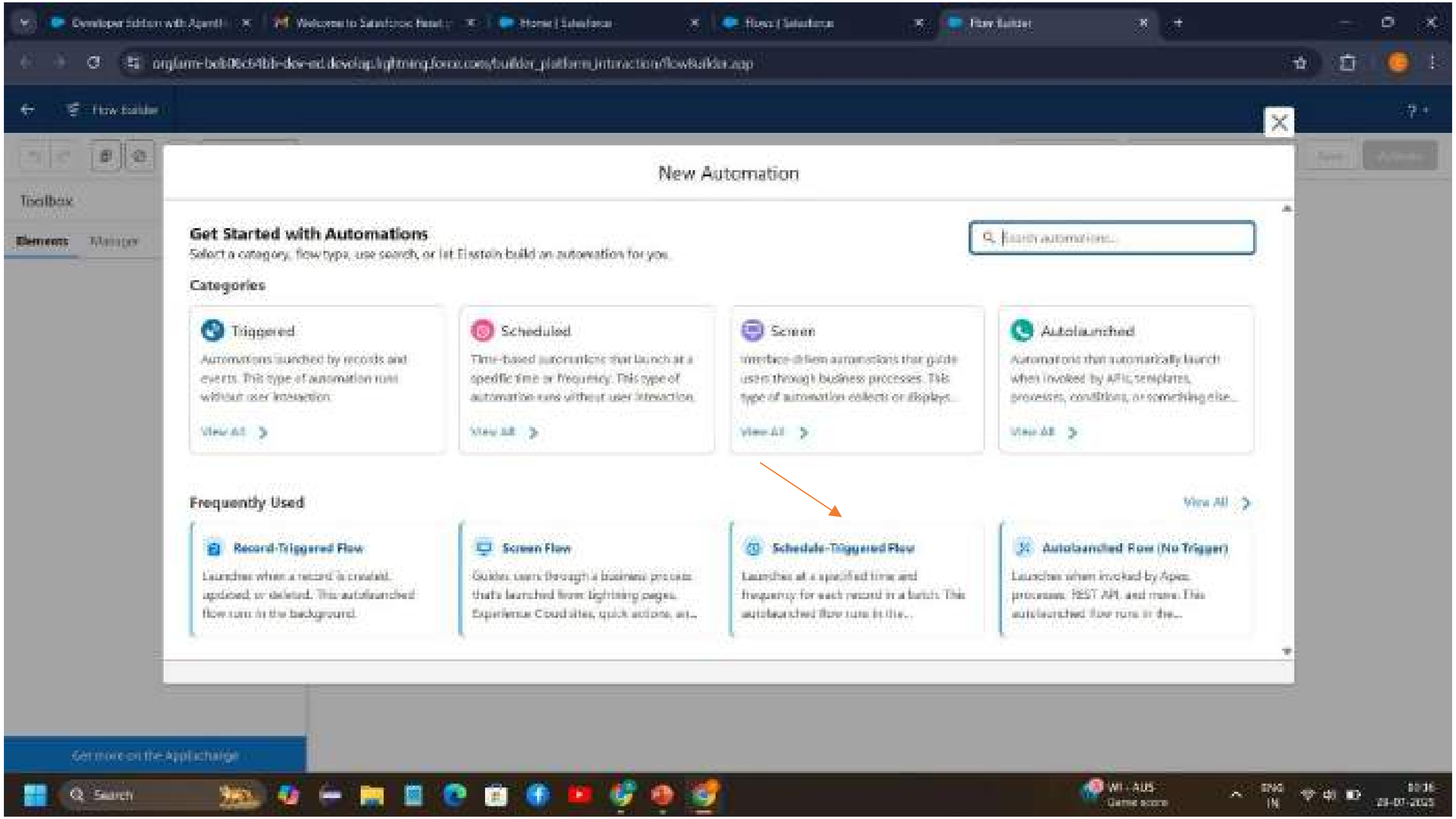


Add an "Action" Element
Click the "+" icon → Select Action.
Action Type: Send Email Alert
Create a new Email Alert (Similar to the Order Confirmation setup).
Recipient: Inventory Manager.
Save & Activate the Flow
Name: Stock Alert Flow
Click Save → Activate.

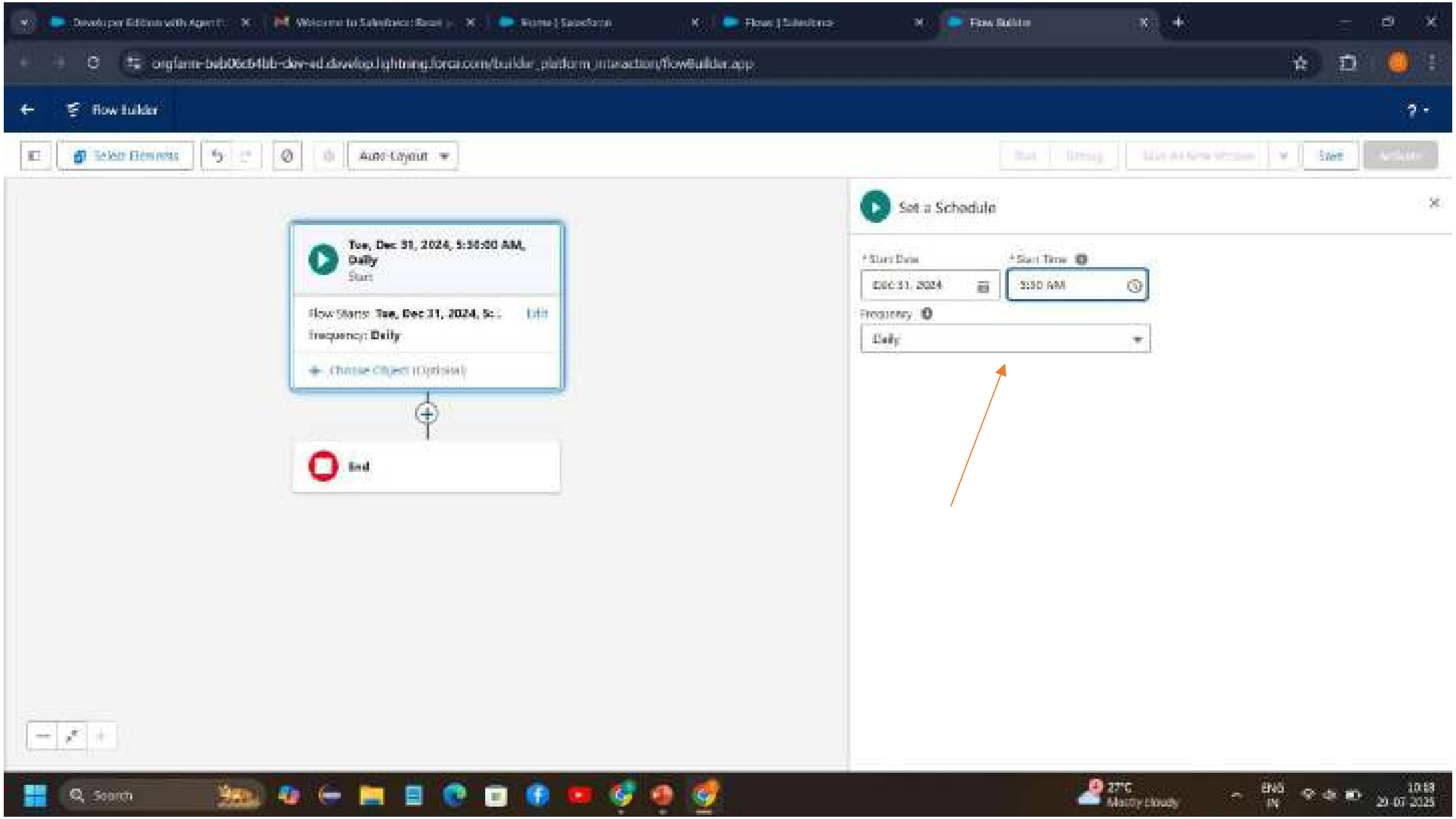


Create a Scheduled Flow

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.



Add "Get Records" Element

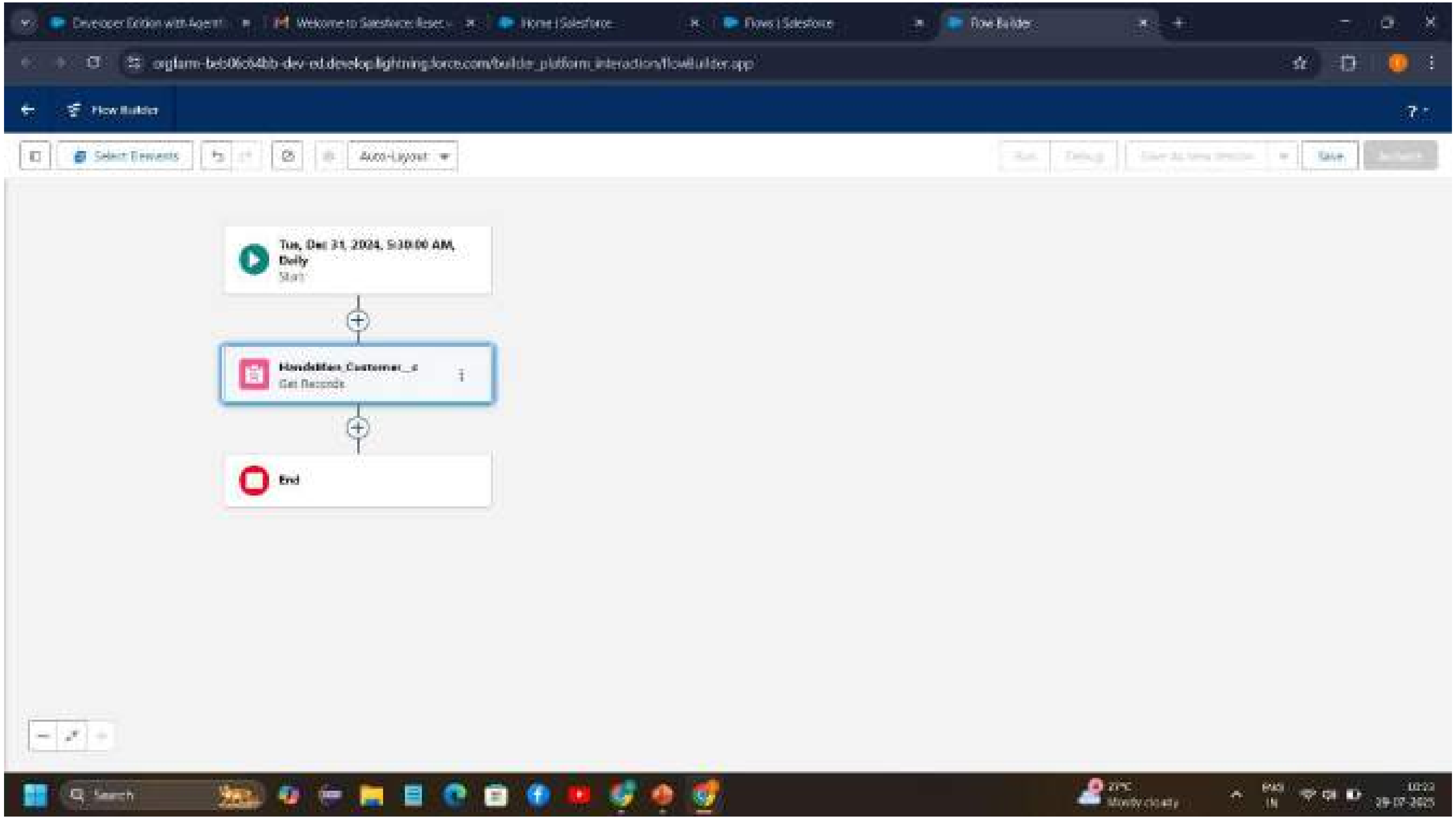
Click the "+" icon → Select Get Records.

Object: HandsMen_Customer__c

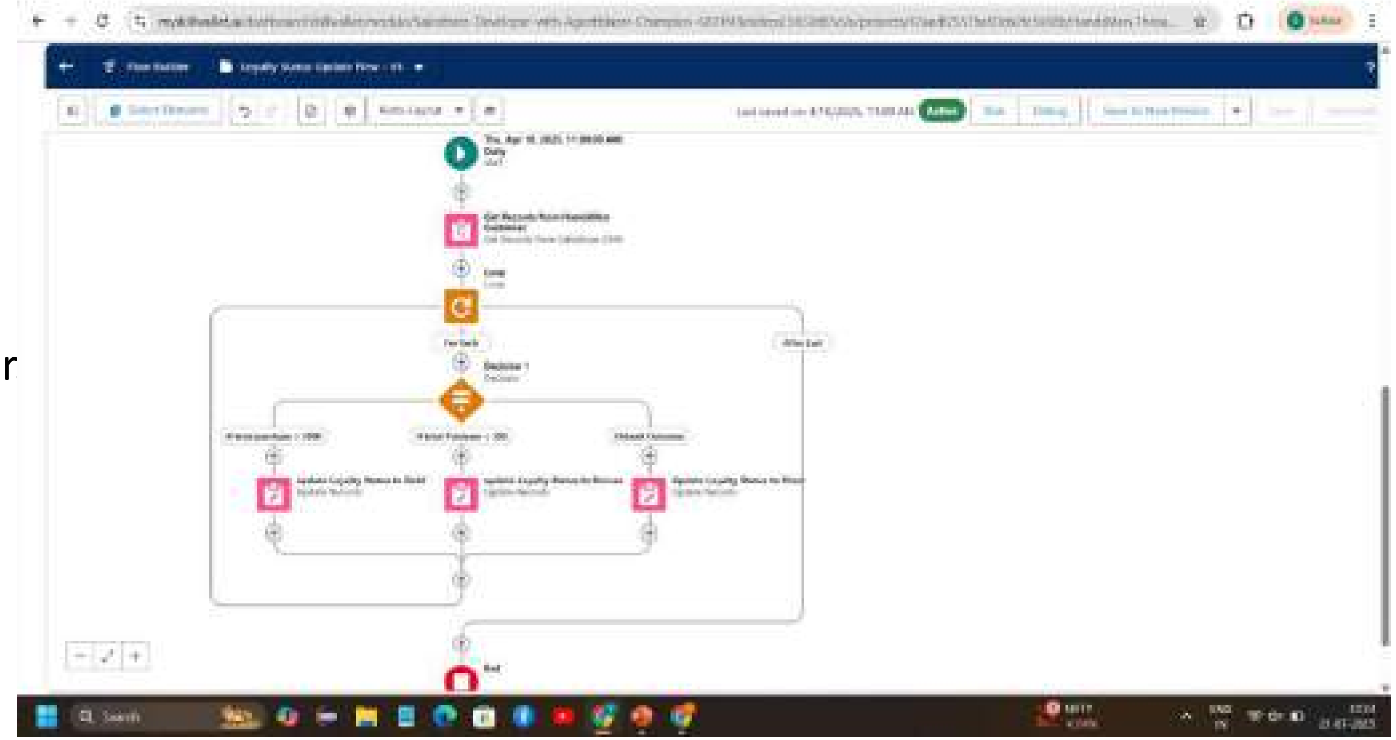
Filter: Retrieve all records.

Sort Order: None.

Click Done.



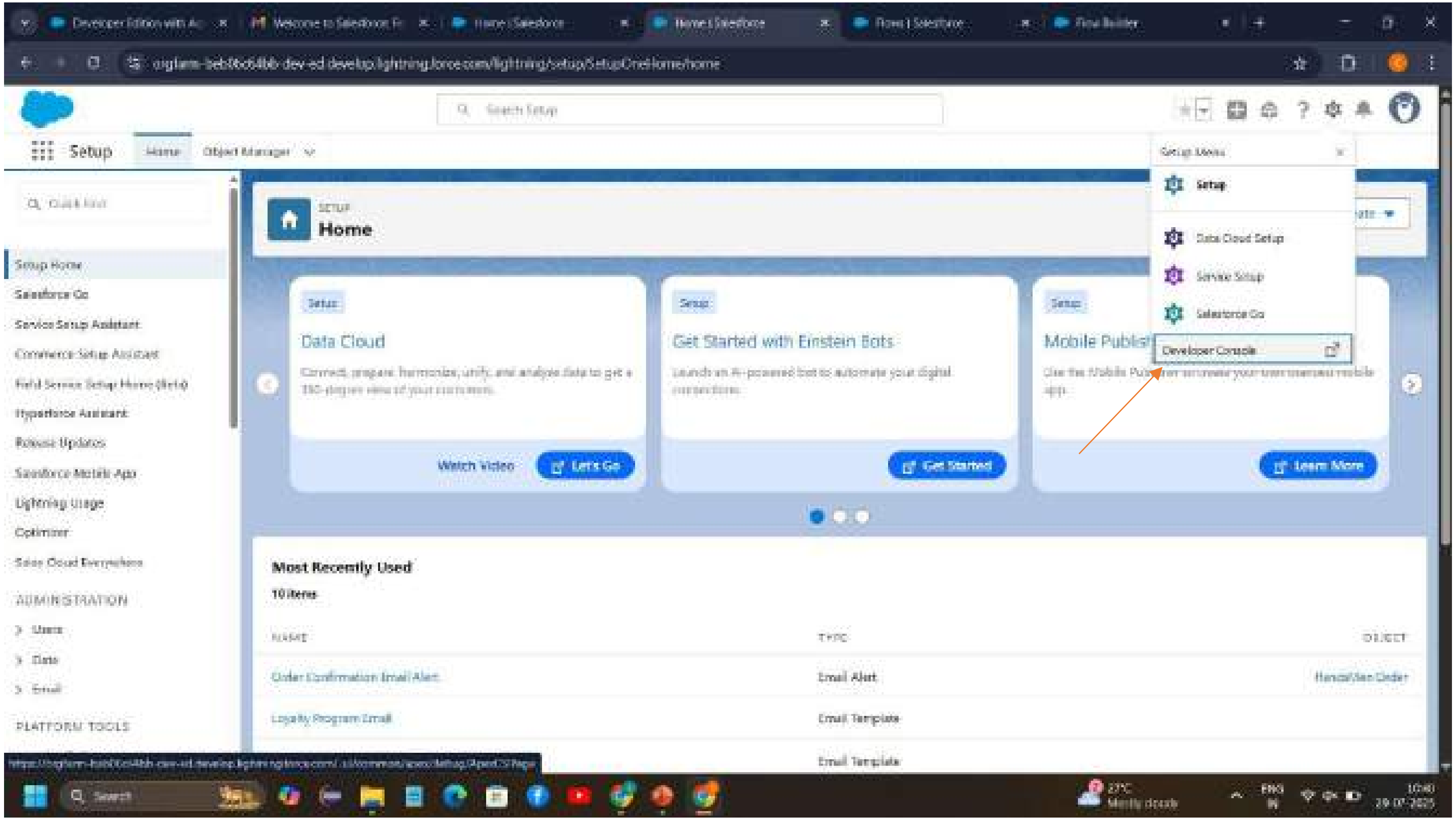
Add "Loop" Element
Click the "+" icon → Select Loop.
Collection: {!Get_Records}
Direction: First to Last.
Click Done.
Inside Loop -
Click the "+" inside the loop → Select Decision.
Set Conditions:
If Total_Purchases__c > 1000, Set Loyalty_Status__c = Gold.
Click the "+" Add Update Records
Records to 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.



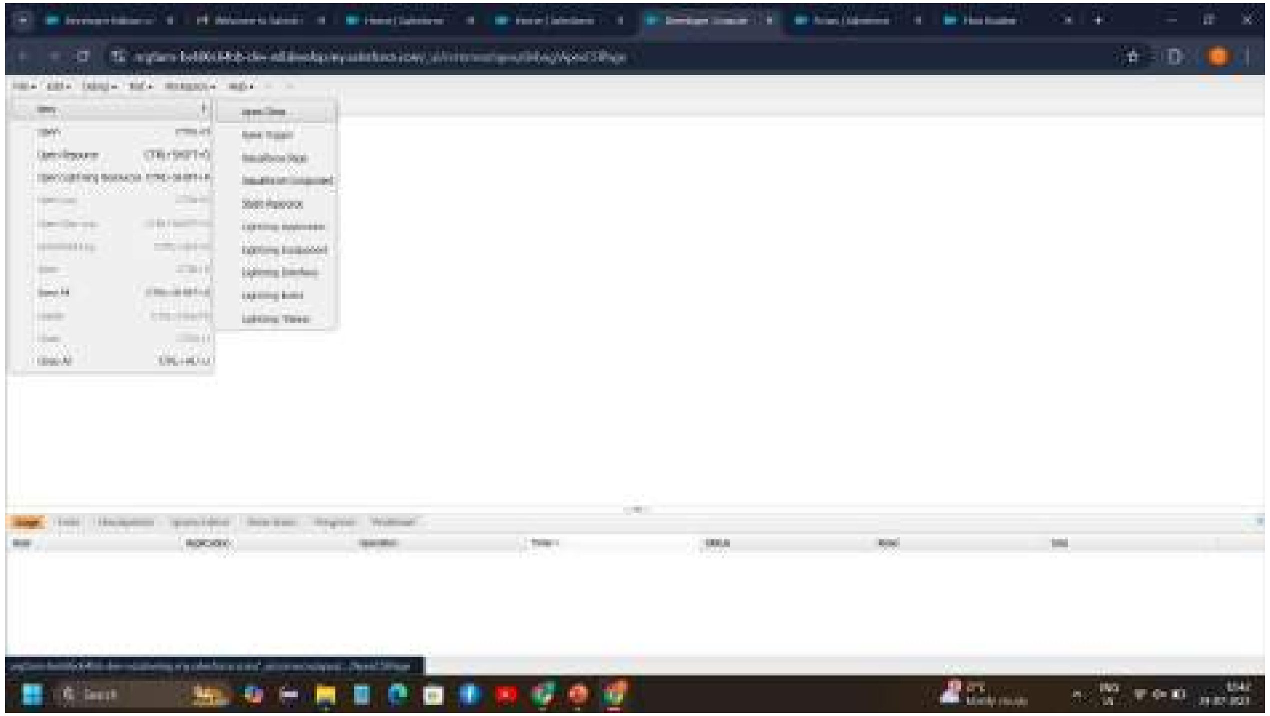
Automation using Apex

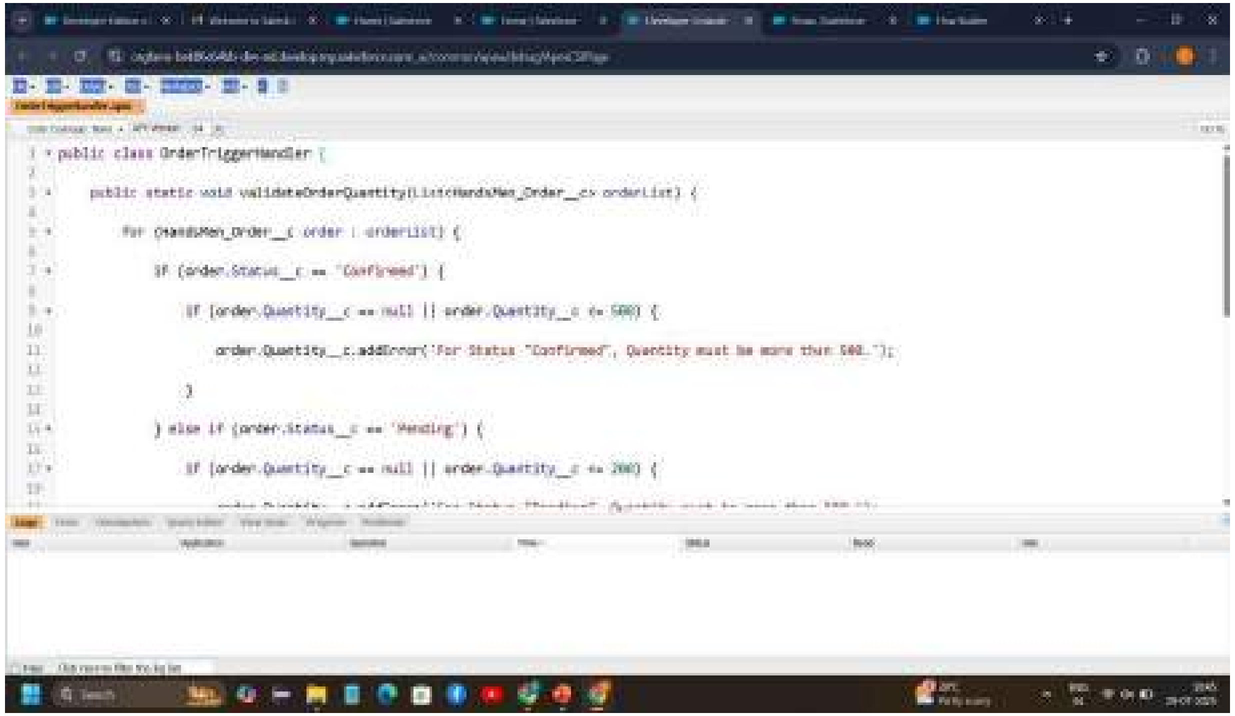
Create Apex Class

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

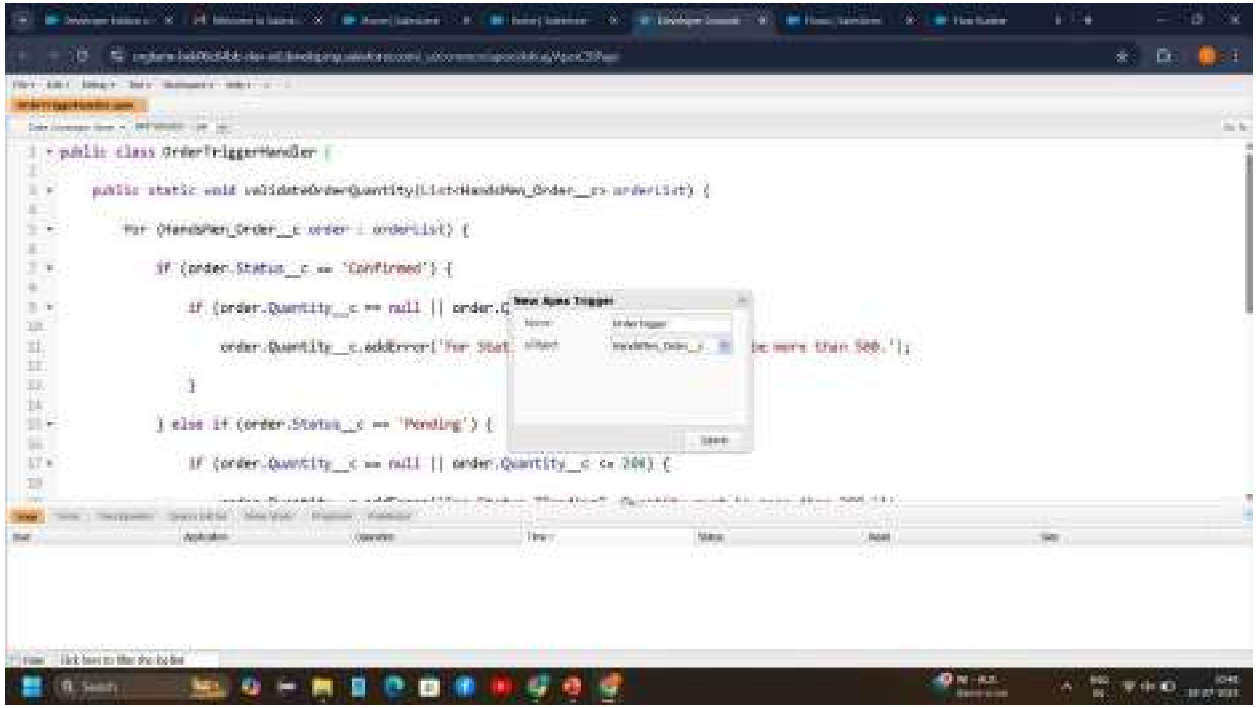


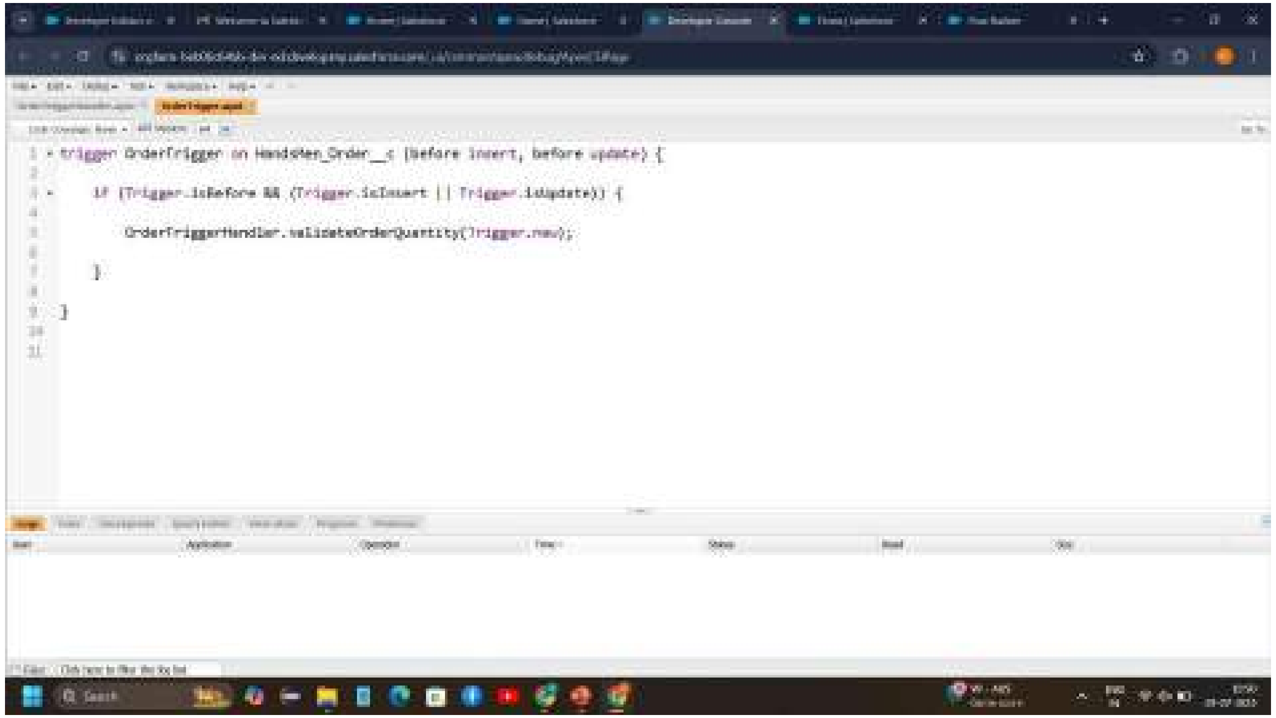
Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
To create a new Apex Class follow the below steps:
Click on the file → New → Apex Class.





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





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.

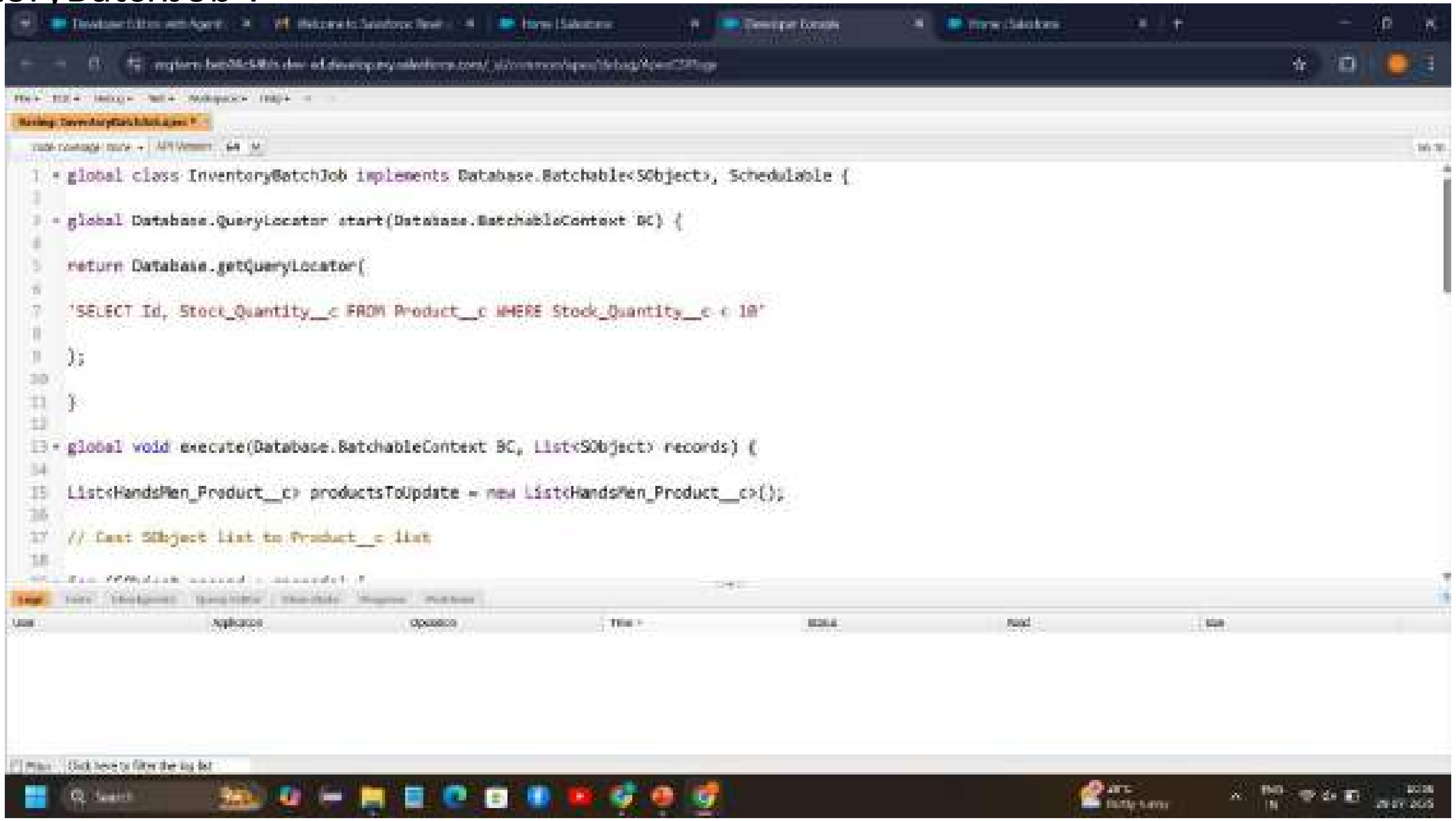
To create a new Apex Class follow the below steps:

Click on the file → New → Apex Class.

Give the Apex Class name as “InventoryBatchJob”.

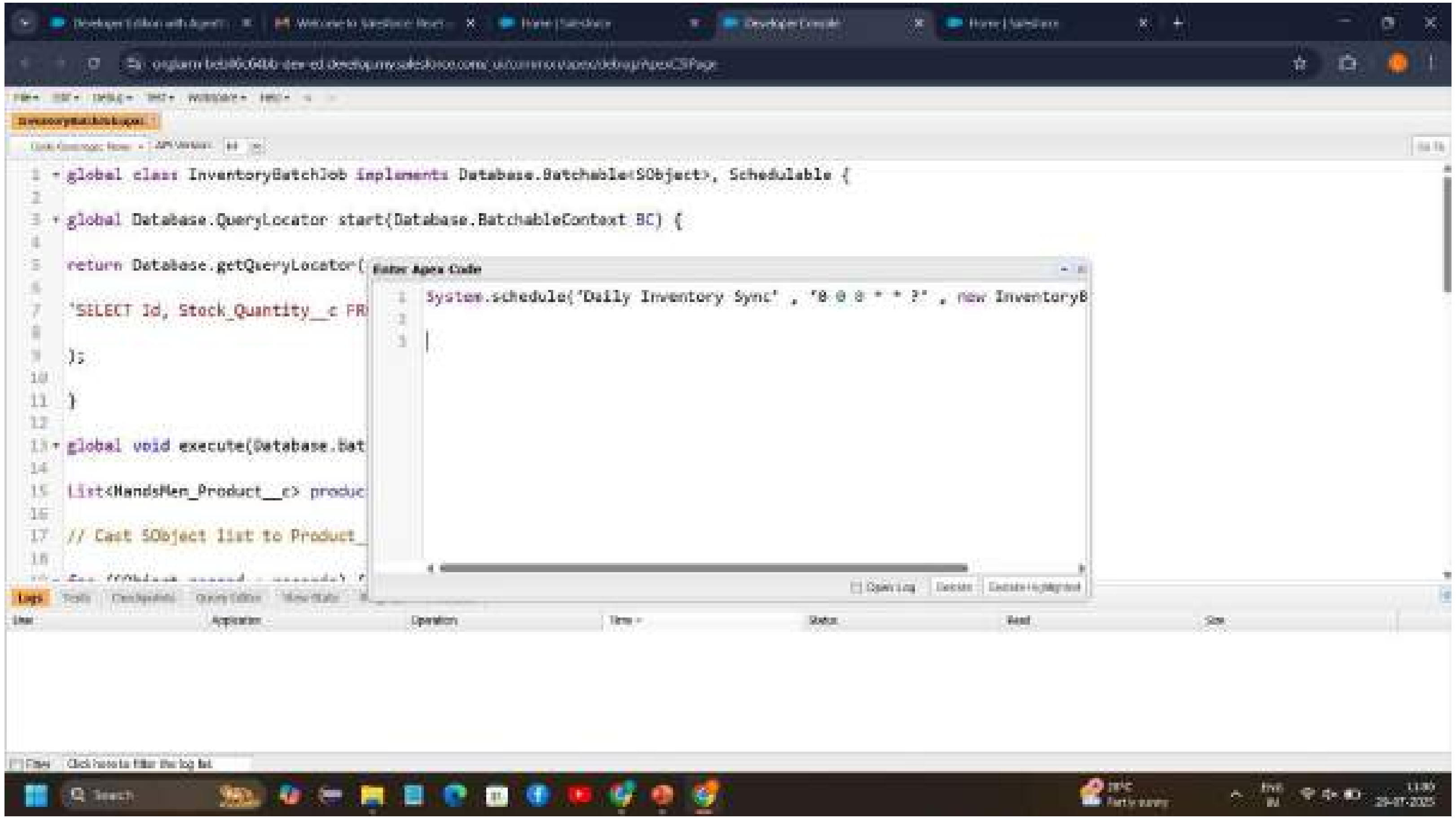
Click ok.

Now write the code logic here



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