

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.

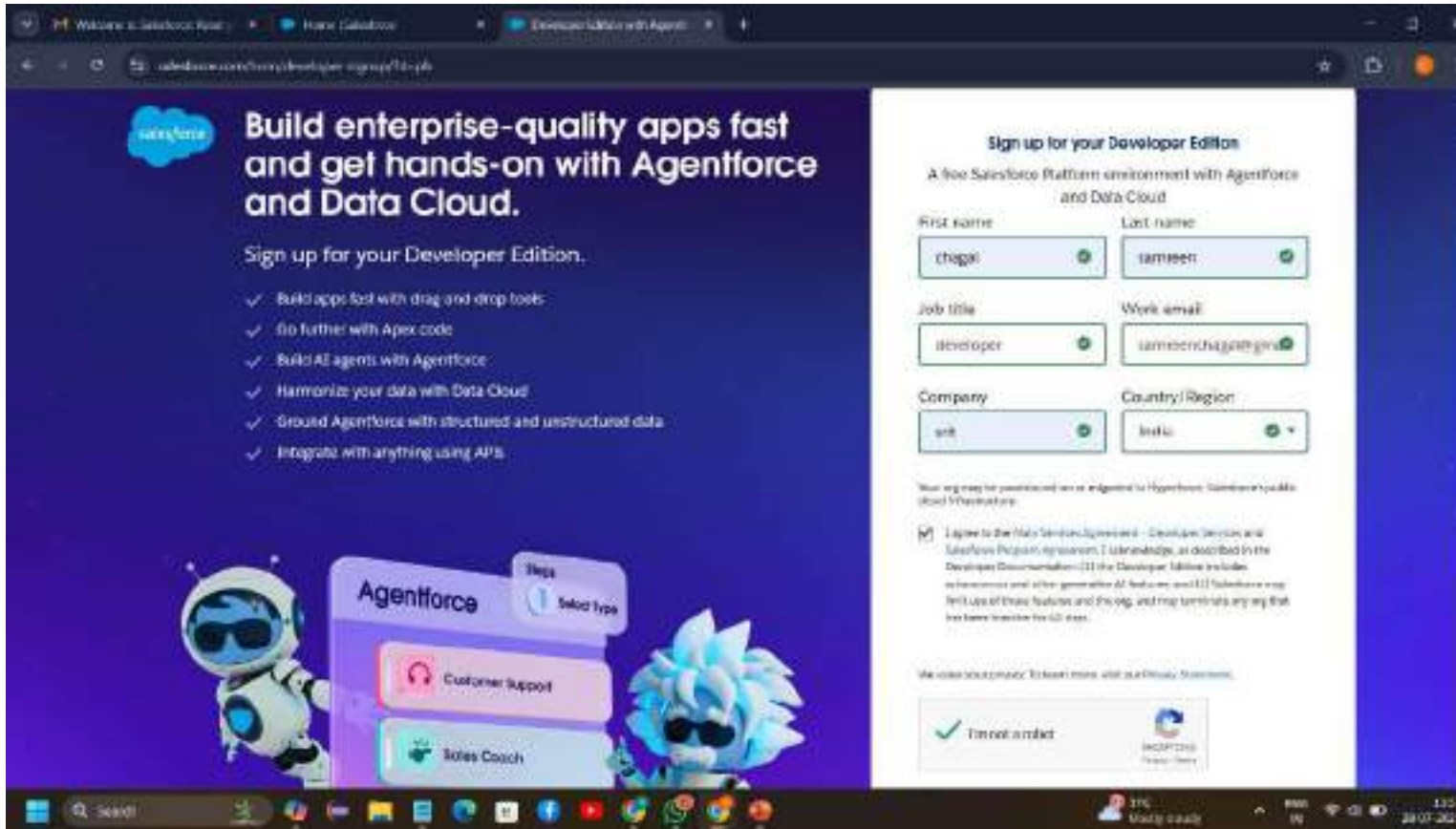
Post-go-live support and monitoring

Deliverable:

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

Salesforce Credentials Setup

Creating Developer Account



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A free Salesforce Platform environment with Agentforce and Data Cloud

First name: chopki

Last name: samreen

Job title: Developer

Work email: samreen@chopki.com

Company: chopki

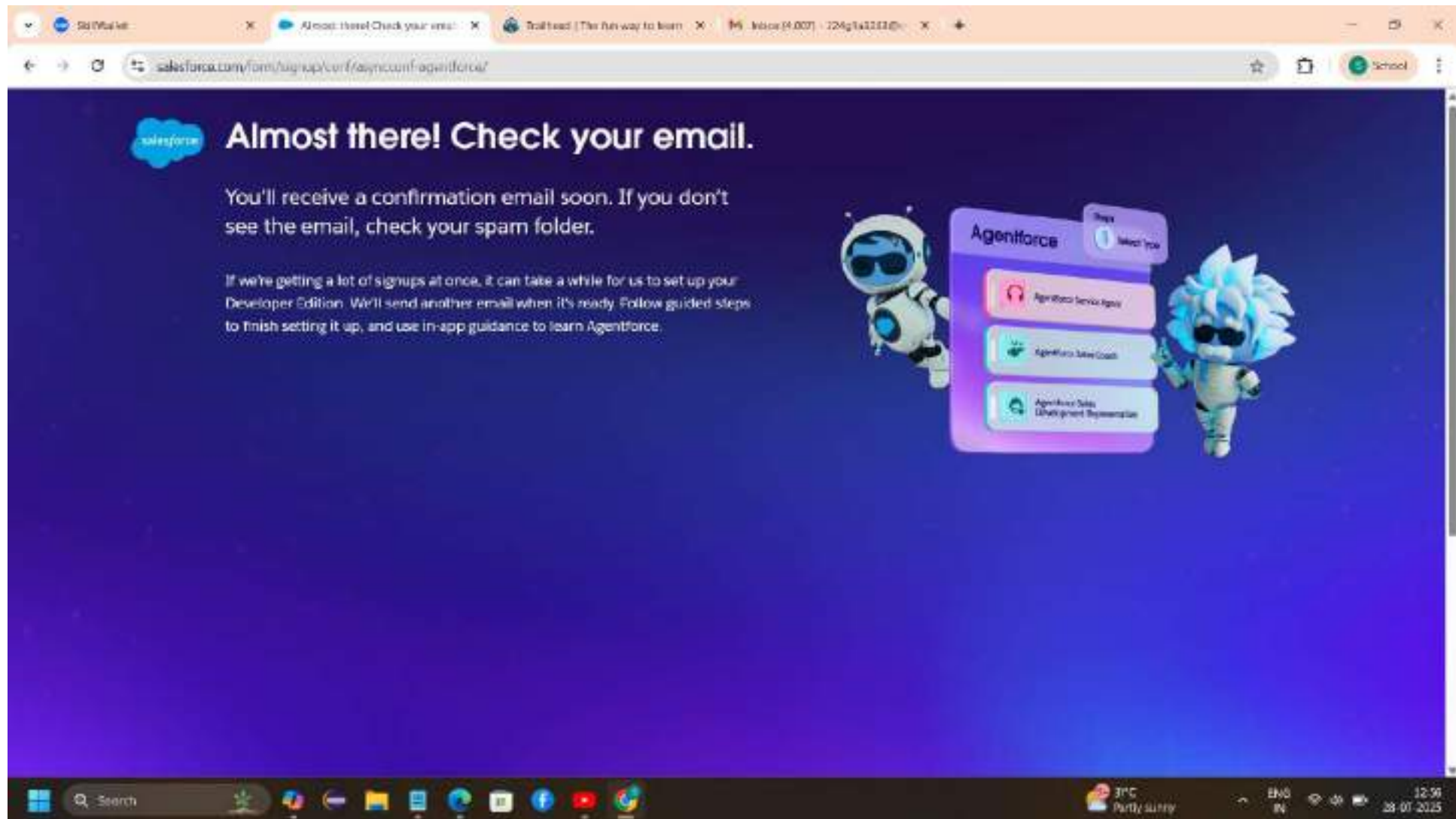
Country/Region: India

Your org may be provisioned as an Agentforce Hyperforce Sandbox's public cloud Sandbox org.

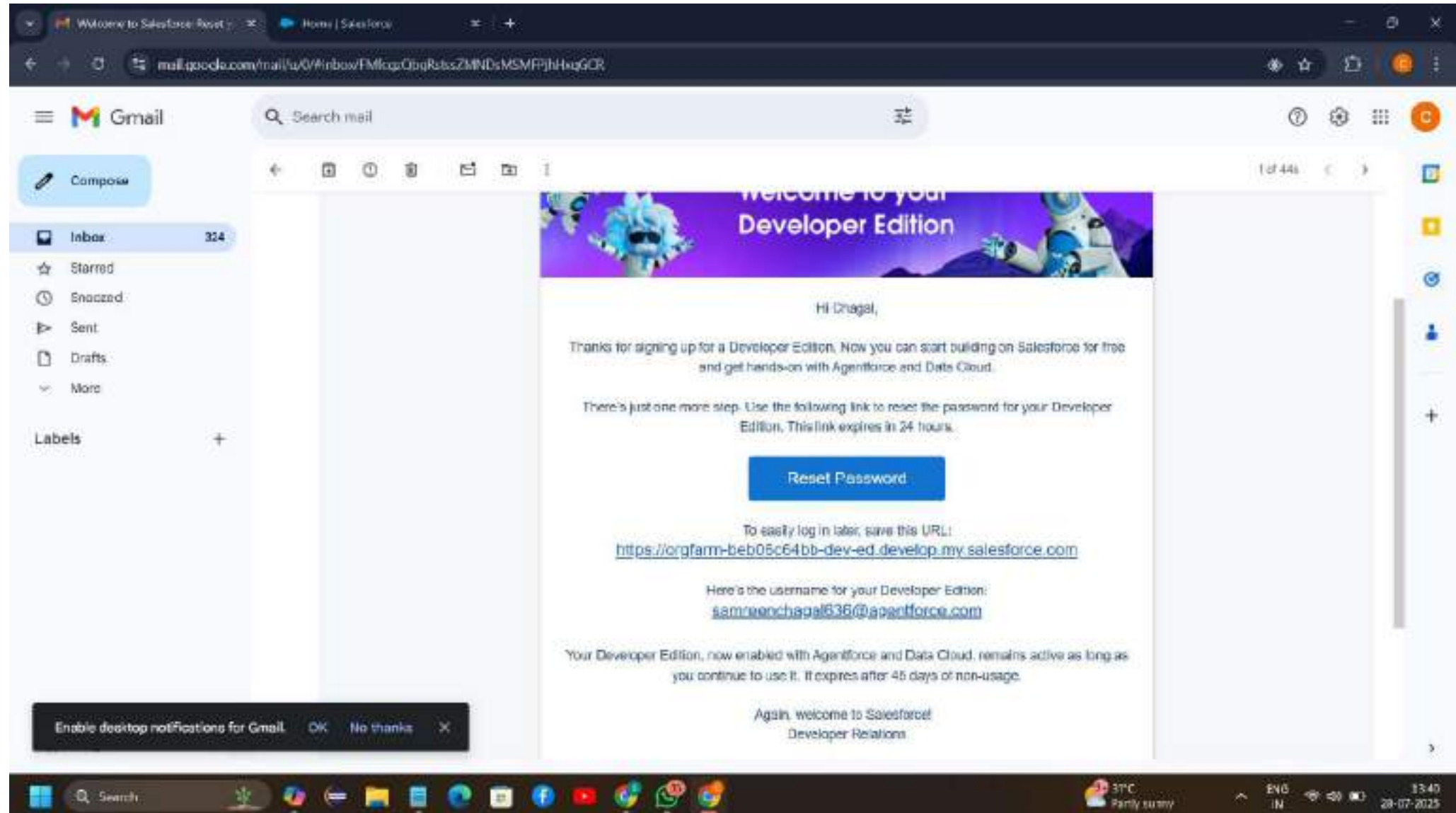
☒ I agree to the Salesforce Developer Edition - Developer Services and Salesforce Platform Agreement, I understand, as described in the Developer Documentation (I) the Developer Edition includes my Salesforce and other generative AI features and (II) Salesforce may limit use of these features and the org, and may terminate any org that has been inactive for 120 days.

☒ I am not a robot

13:53 28/07/2025



Account Activation



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

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

Search bar: Search...

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

Seller Home

Good afternoon, Chagal. Let's get selling!

Close Deals

Opportunities owned by me and closing this quarter

Total Pipeline: \$0

- 0 Open
- 0 Won
- 0 Lost

[View Opportunities](#)

Plan My Accounts

Accounts owned by me

Accounts: 0

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

[View Accounts](#)

Grow Relationships

Contacts owned by me and created in the last 90 days

Contacts: 0

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

[View Contacts](#)

Build Pipeline

Leads owned by me and created in the last 30 days

0 Upcoming Activity

My Goals

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

Today's

Stay ahead of incidents

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

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

To Do List

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

Data Management - Objects

The following are the Custom objects which we need to create

HandsMen Customer

HandsMen Order

HandsMen Product

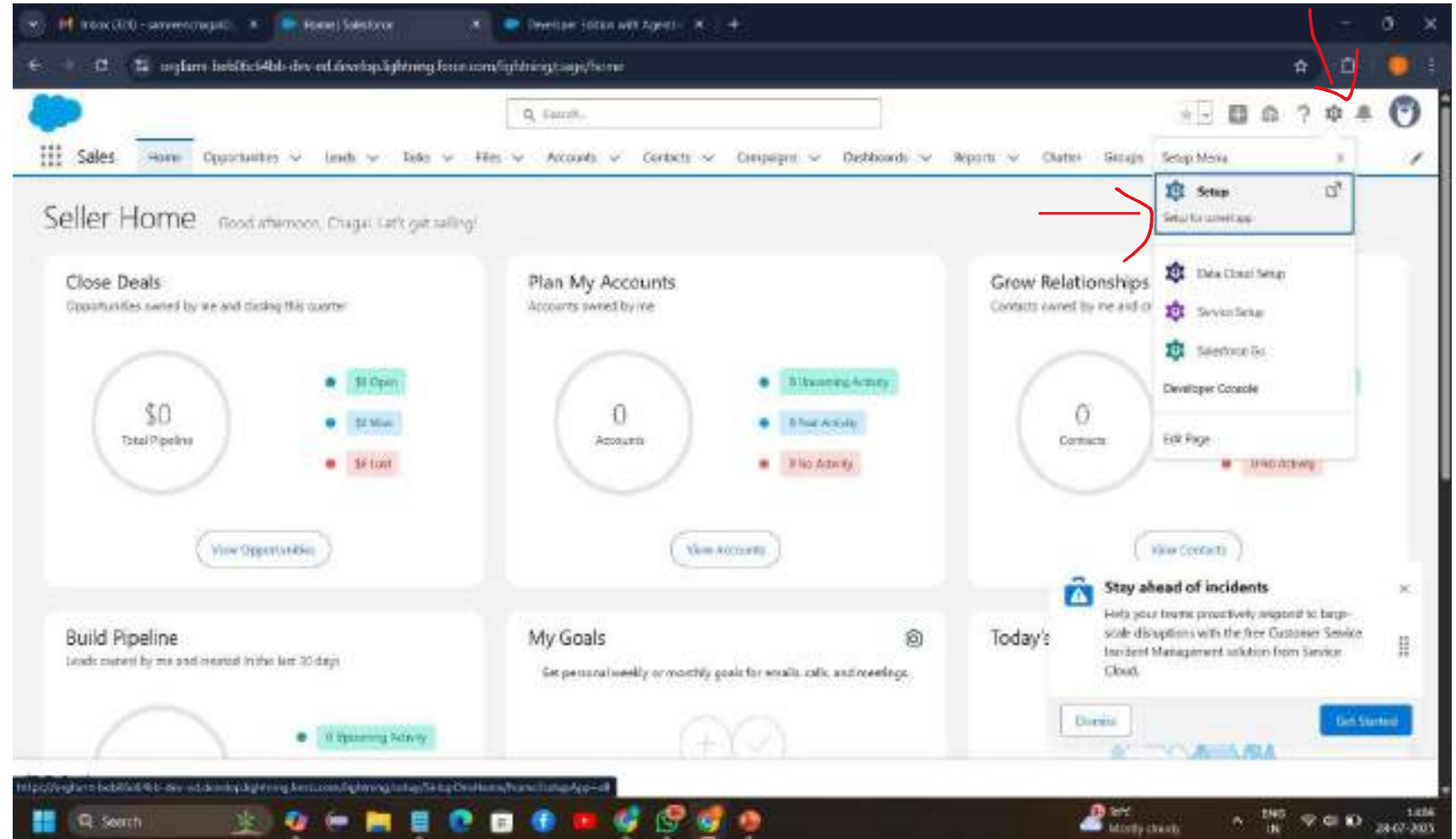
Inventory

Marketing Campaign

Object - HandsMen Customer

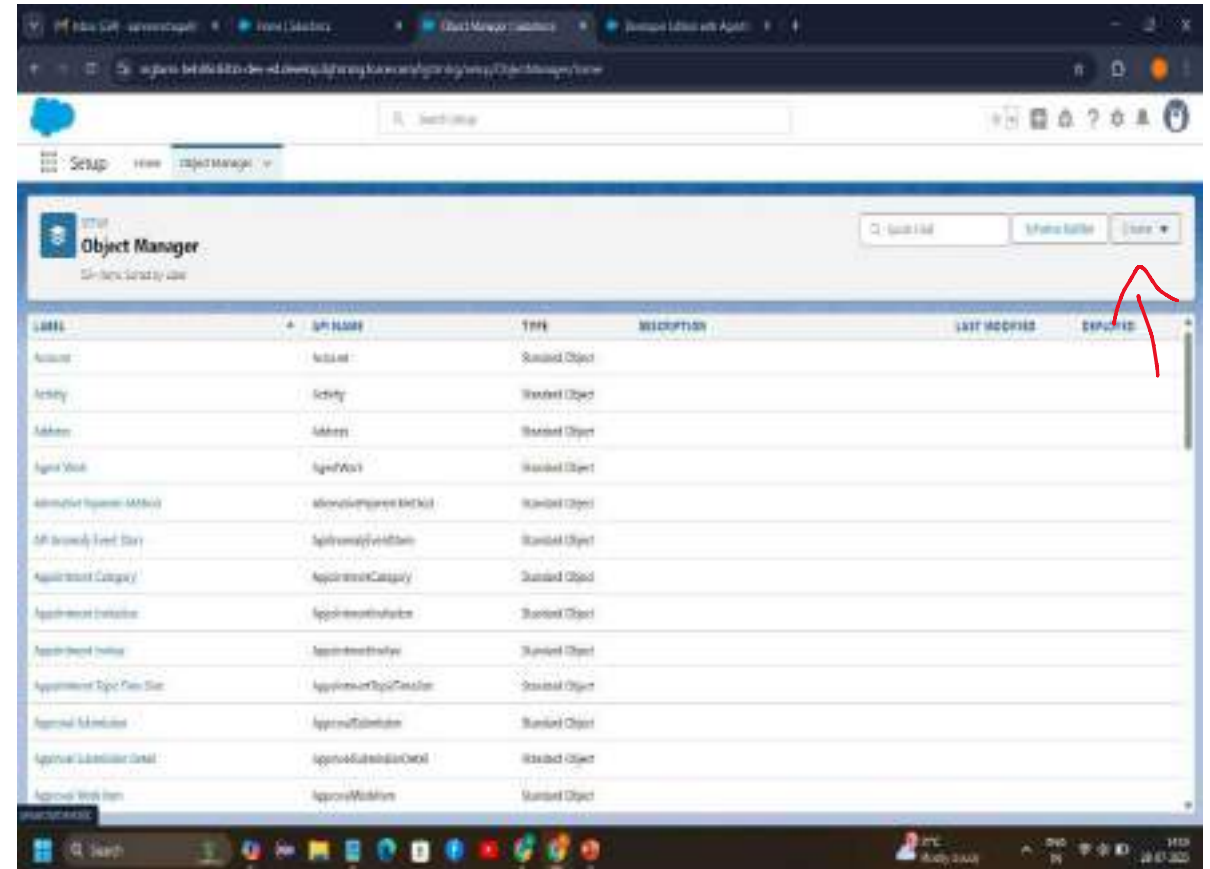
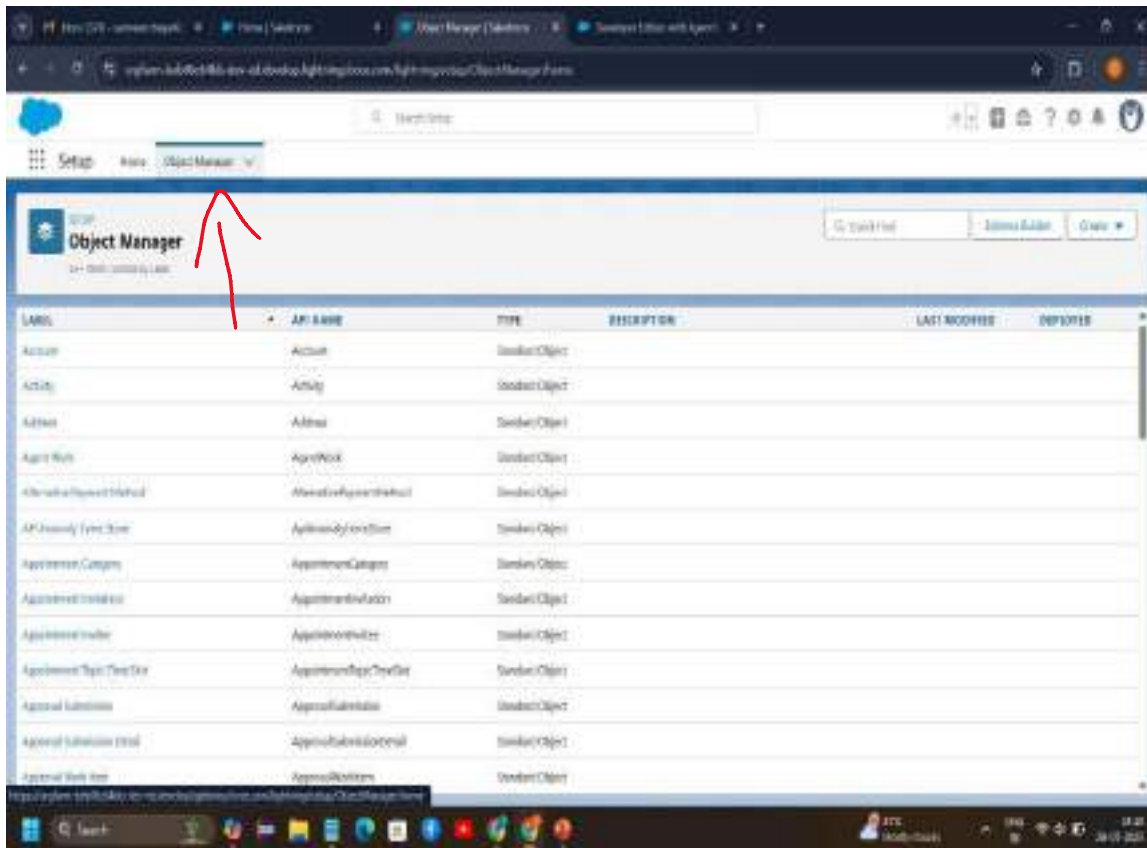
Description

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



To create an object:

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



Click on Custom Object

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

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

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

The screenshot shows the Salesforce 'New Custom Object' setup page. The browser address bar shows the URL: `orgform-bbb0f6d4bb-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), 'API 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:

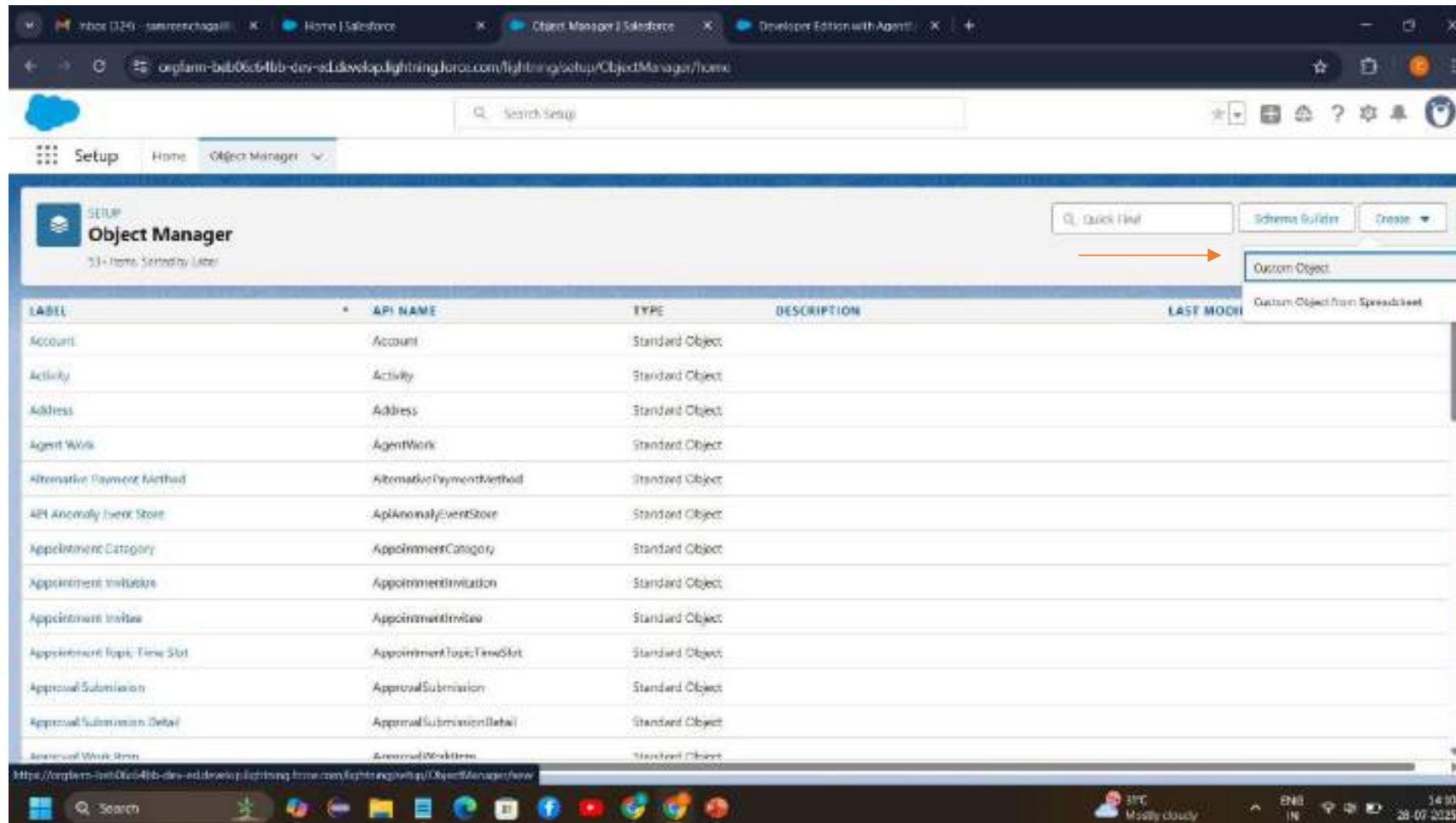
- Allow Reports:** This section contains several checkboxes. The 'Allow Reports' checkbox is checked and highlighted with an orange arrow.
- Object Classification:** This section explains that when these settings are enabled, the object is classified as an Enterprise Application object. It includes checkboxes 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 'Create' button in the top right corner is highlighted with an orange arrow pointing to the 'Custom Object' option in the dropdown menu. The main table lists various standard objects, including 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.

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 shows the Salesforce 'New Custom Object' setup page. The page is titled 'New Custom Object' and shows the 'Custom Object Information' section. In this section, the 'Label' is 'HandsMen Product' and the 'Plural Label' is 'HandsMen Products'. The 'Object Name' is 'HandsMen_Product'. Below this, the 'Enter Record Name Label and Format' section shows the 'Record Name' as 'HandsMen Product Name' and the 'Data Type' as 'Text'. A warning message is visible: 'Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.' The page also includes a 'Setup' navigation bar, a search bar, and a footer with system information.

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

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

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

At the bottom of the page, there are three buttons: 'Save', 'Save & New', and 'Cancel'. An orange arrow points to the 'Save' button. The Windows taskbar at the bottom shows the search bar, several application icons, and the system tray with the date '28-07-2025' and time '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 shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Object Manager' header includes a search bar and a 'Create' dropdown menu. An orange arrow points from the 'Create' dropdown to the 'Custom Object' option. The main area displays a table of standard objects.

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

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

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

The screenshot shows the 'New Custom Object' setup page in Salesforce. The page is titled 'New Custom Object' and contains several sections for configuring the object. The 'Label' field is set to 'HandsMen Order' and the 'Plural Label' is 'HandsMen Orders'. The 'Object Name' is 'HandsMen_Order'. The 'Record Name' is 'HandsMen Order Name'. The 'Data Type' is 'Auto Number', the 'Display Format' is 'O-{0000}', and the 'Starting Number' is '001'. There are orange arrows pointing to the 'Label' and 'Record Name' fields.

Label and Plural Label:

- Label: HandsMen Order (Example: Account)
- Plural Label: HandsMen Orders (Example: Accounts)

Object Name: HandsMen_Order (Example: Account)

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 IT IS TRUE

Starting Number: 001

Info (124) - comminchagall - X

Home | Salesforce - X

New Custom Object | Salesforce - X

Developer Edition with Agents - X

org/ami-bes06b46b-dev-ed/develop/lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

Setup Home Object Manager

SETUP

New Custom Object

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Learning

Object Classification

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

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

☐ In Development

☒ Deployed

[What is this?](#)

Search Status

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

☒ Allow Search

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

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & Close Cancel

Search

SPC
Partly sunny

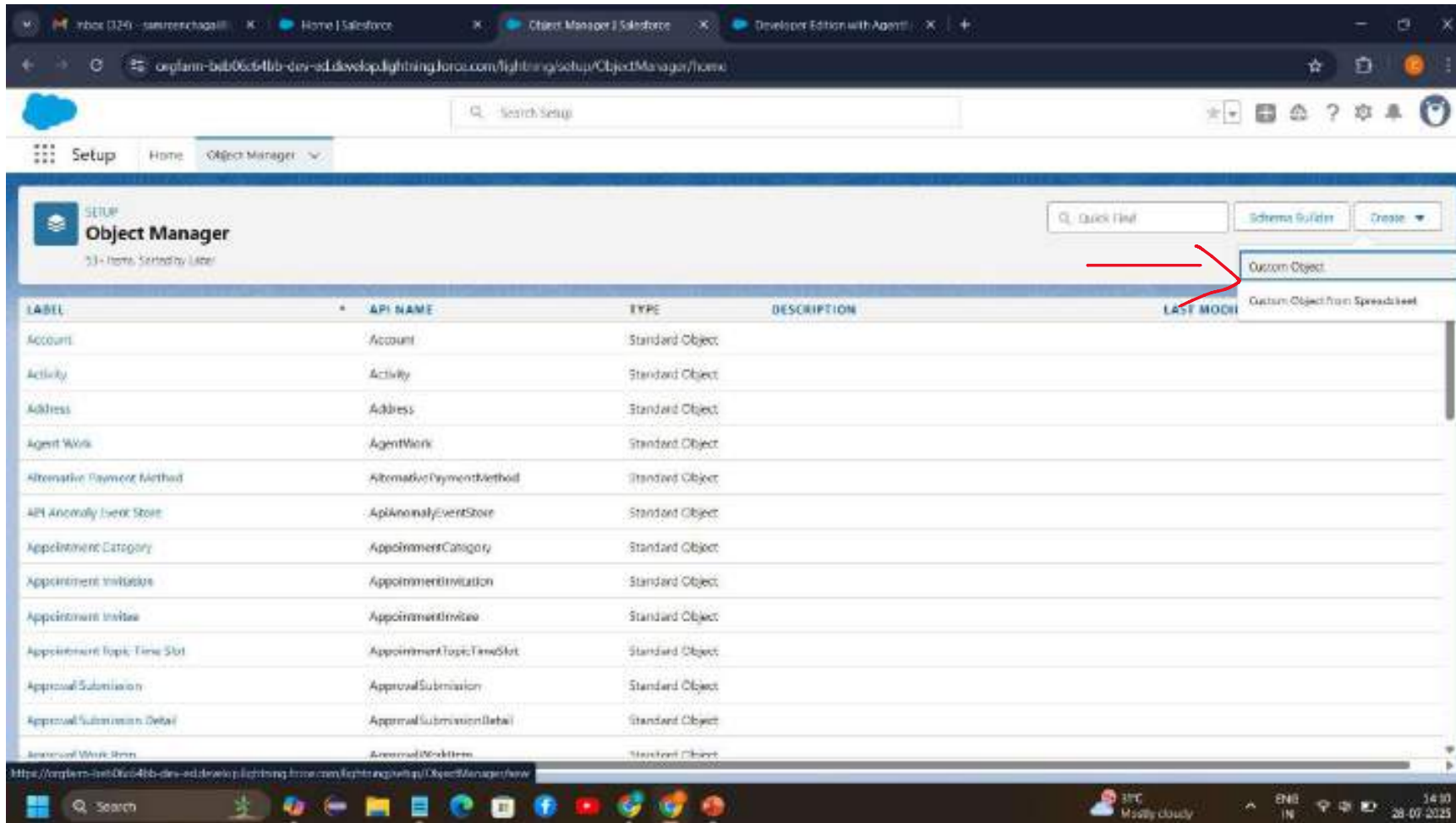
END
IN

14:31
28-07-2025

Create Inventory Object

To create an object:

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



The screenshot shows the Salesforce Object Manager interface. 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'. The page also includes a search bar, navigation tabs (Setup, Home, Object Manager), and a footer with system information.

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

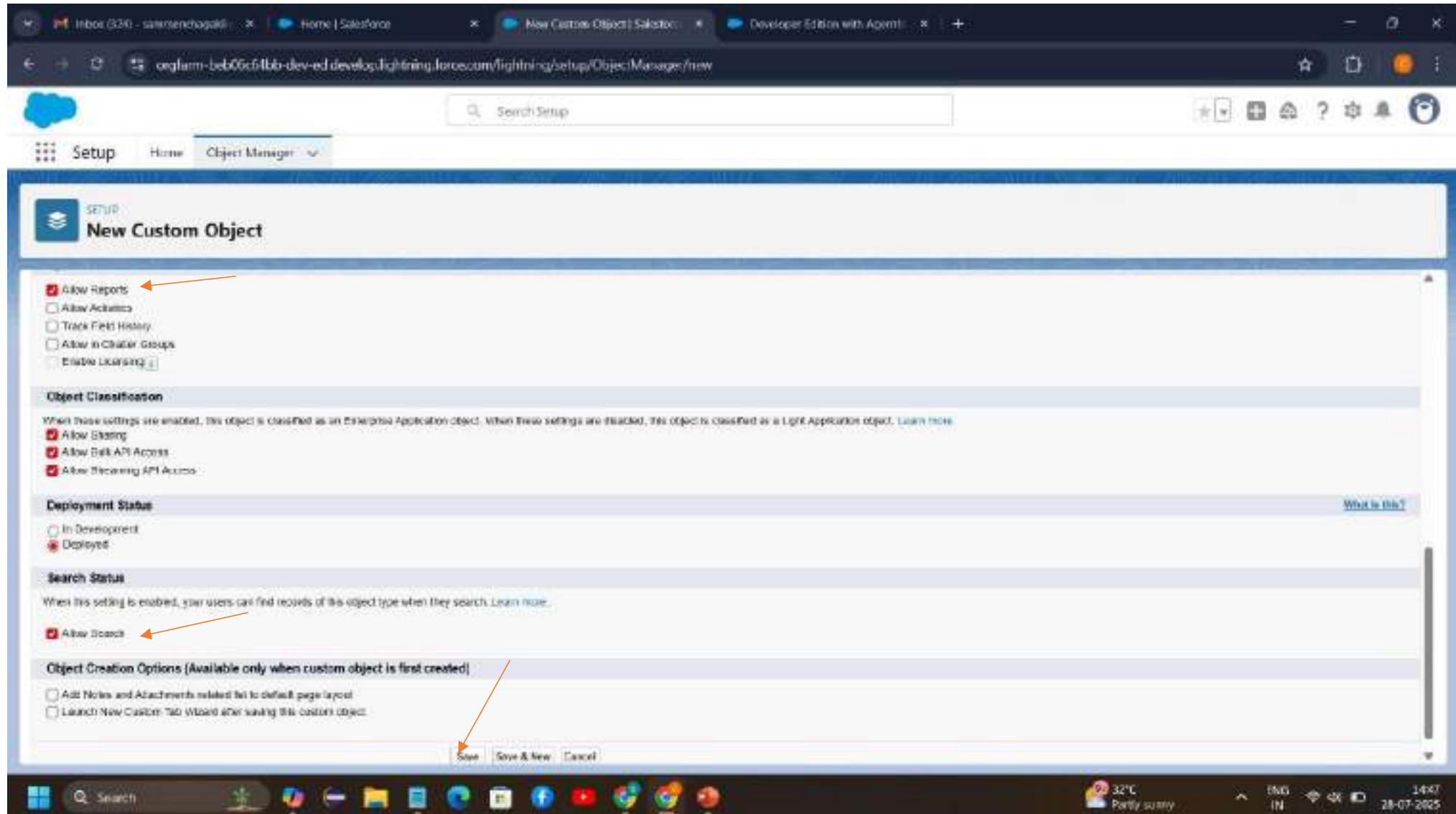
Object Name
Object Name: Inventory
Description:

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

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

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

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



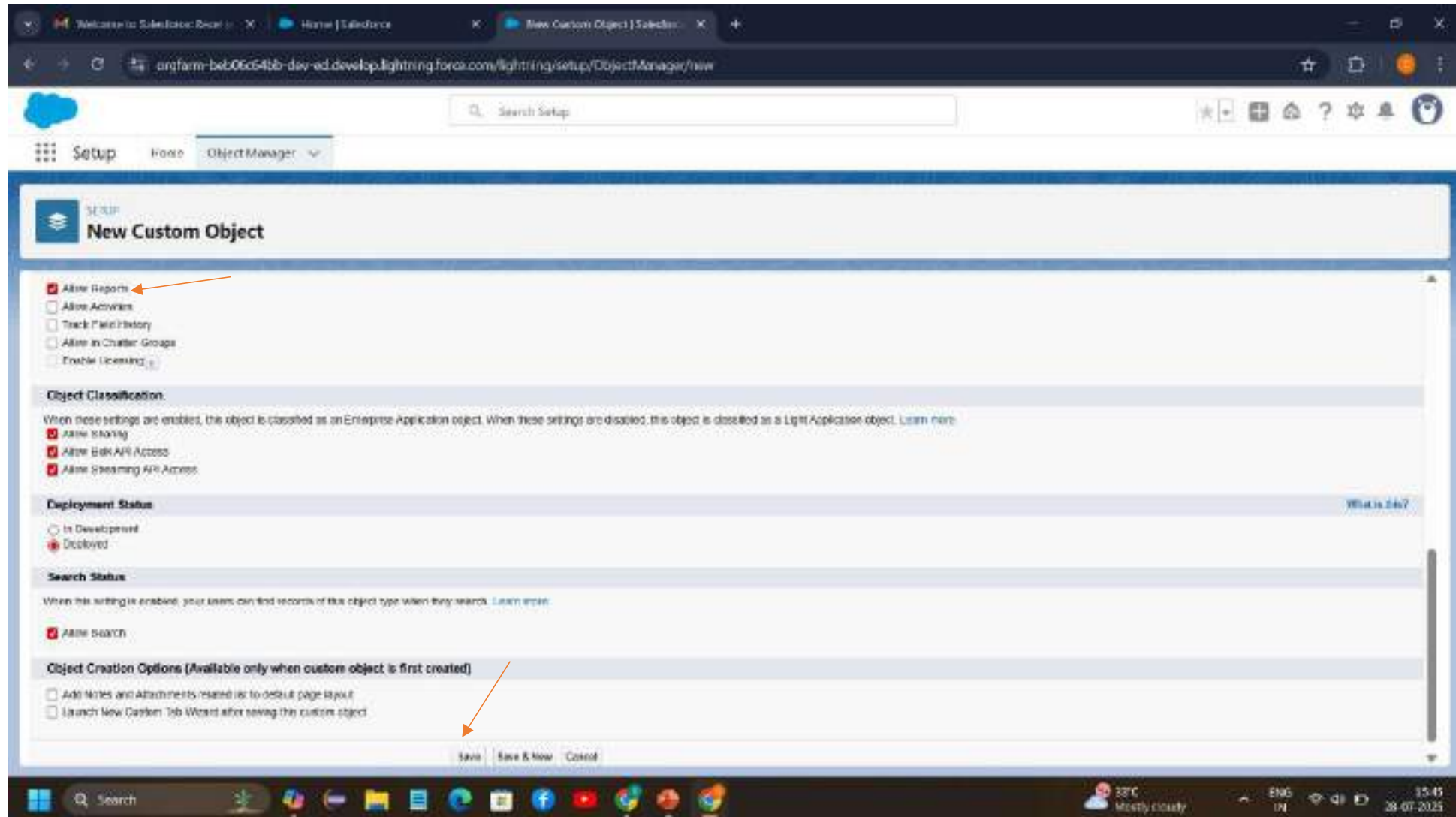
Object - Marketing Campaign

To create an object:

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

The screenshot shows the 'New Custom Object' setup page in Salesforce. The page is titled 'New Custom Object' and has a search bar at the top. The main content area is divided into sections for configuring the object. The 'Label' field is set to 'Marketing Campaign' and the 'Plural Label' is 'Marketing Campaigns'. The 'Record Name' is 'Marketing Campaign Number' and the 'Display Format' is 'MC-{0000}'. The 'Starting Number' is '001'. The 'Data Type' is 'Auto Number'. The 'Object Name' is 'Marketing_Campaign'. The 'Description' field is empty. The 'Customizable Page Layout' section has a warning icon and text. The 'Customizable Page Layout' section has a warning icon and text. The 'Customizable Page Layout' section has a warning icon and text.

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

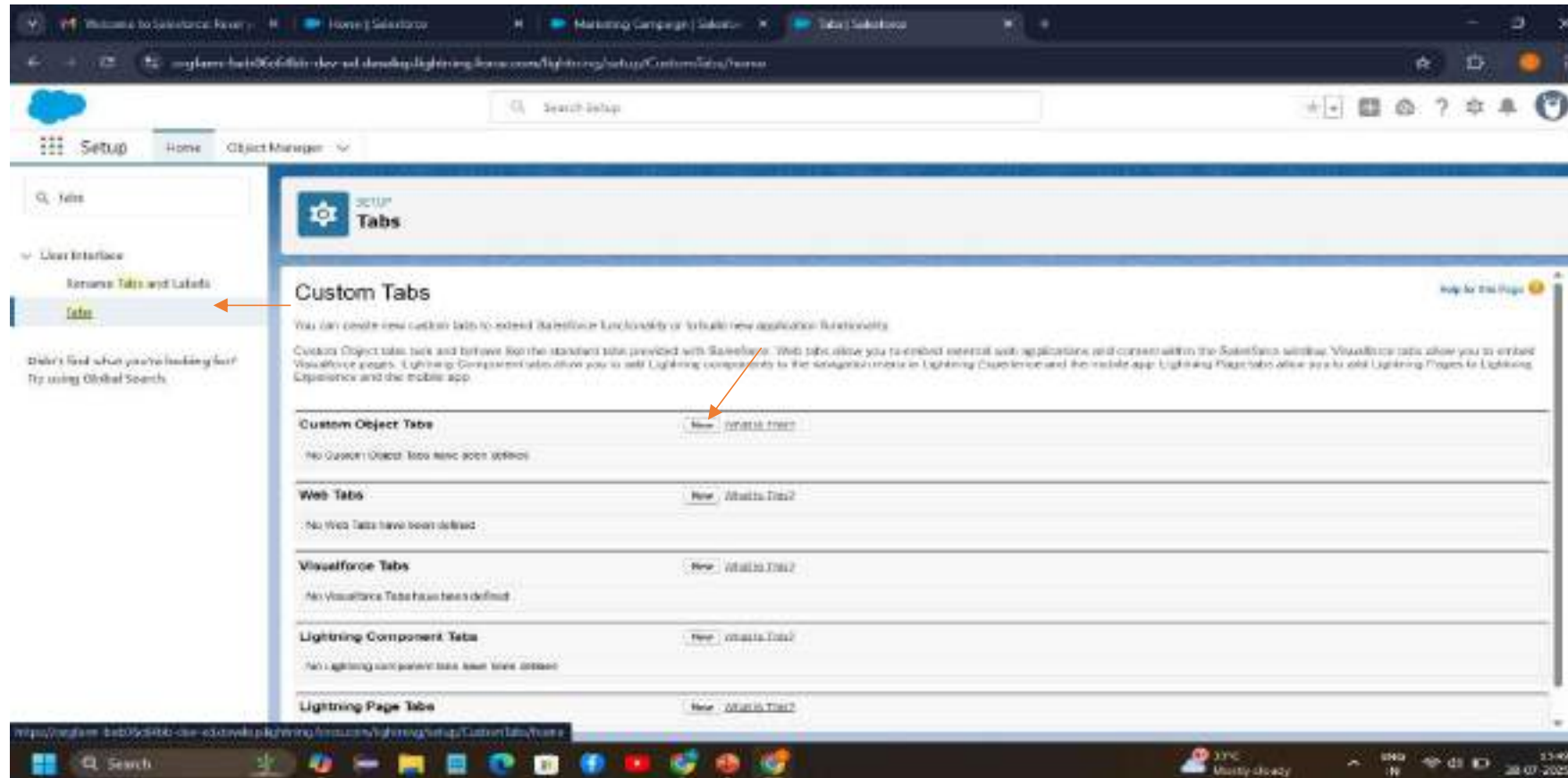


Data Management - Tabs

Creating a Custom Tab(HandsMen Customer)

To create a Tab(HandsMen Customer)

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



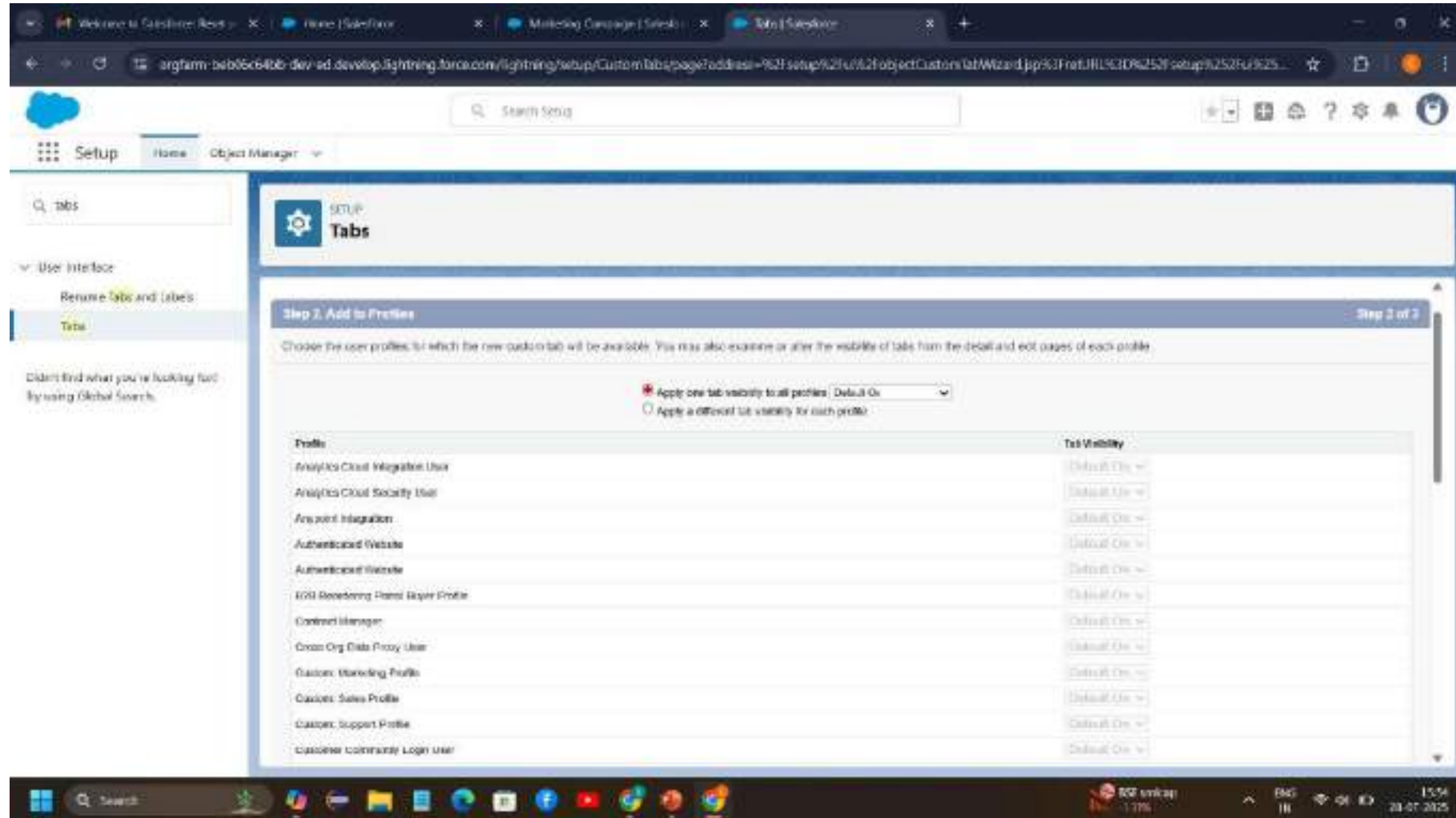
Select Object(HandsMen Customer) → Select any tab style

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

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

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

Next (Add to profiles page) keep it as default



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

The screenshot shows the Salesforce Setup interface. The left sidebar contains the 'Setup' menu and a search bar. The main content area is titled 'Tabs' and displays a list of tabs with checkboxes indicating their status. The 'Sales Console' tab is highlighted. An orange arrow points to the 'Save' button at the bottom right of the page.

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

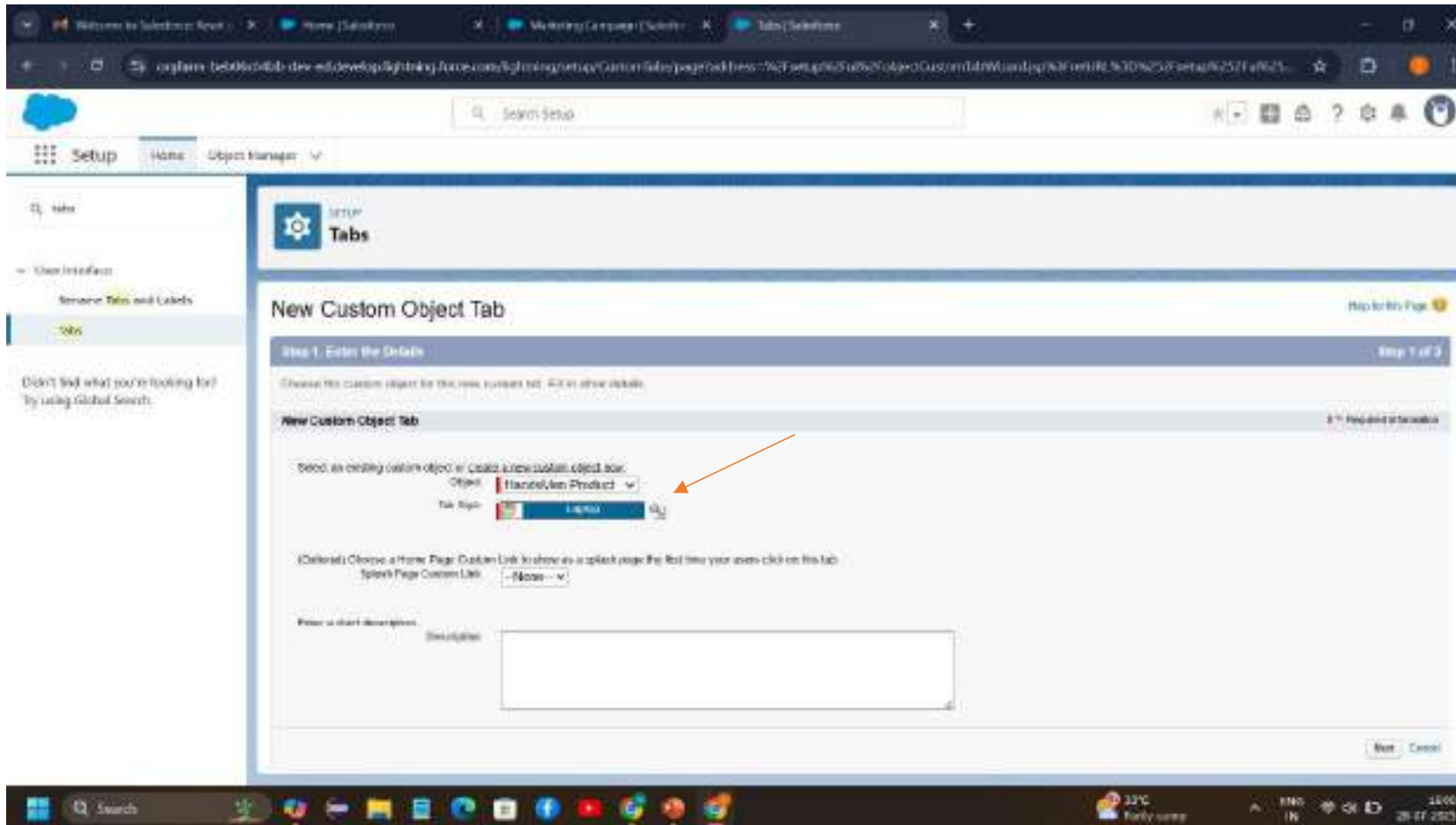
Append tab to user's existing personal customizations

Previous Save Cancel

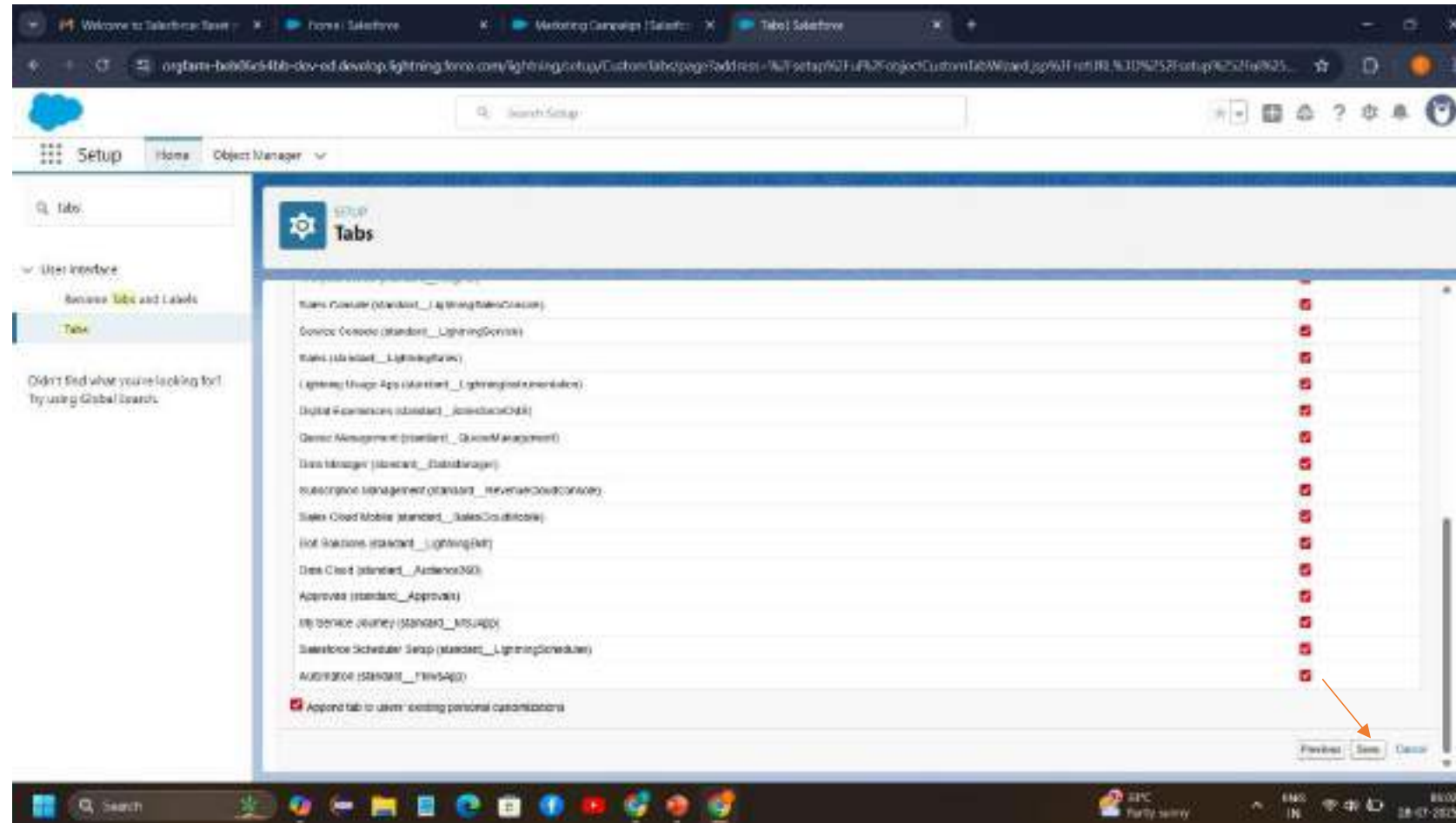
Create Tabs

Create Tab for Object - HandsMen Product

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



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



Creating a Custom Tab(HandsMen Order)

To create a Tab(HandsMen Order)

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

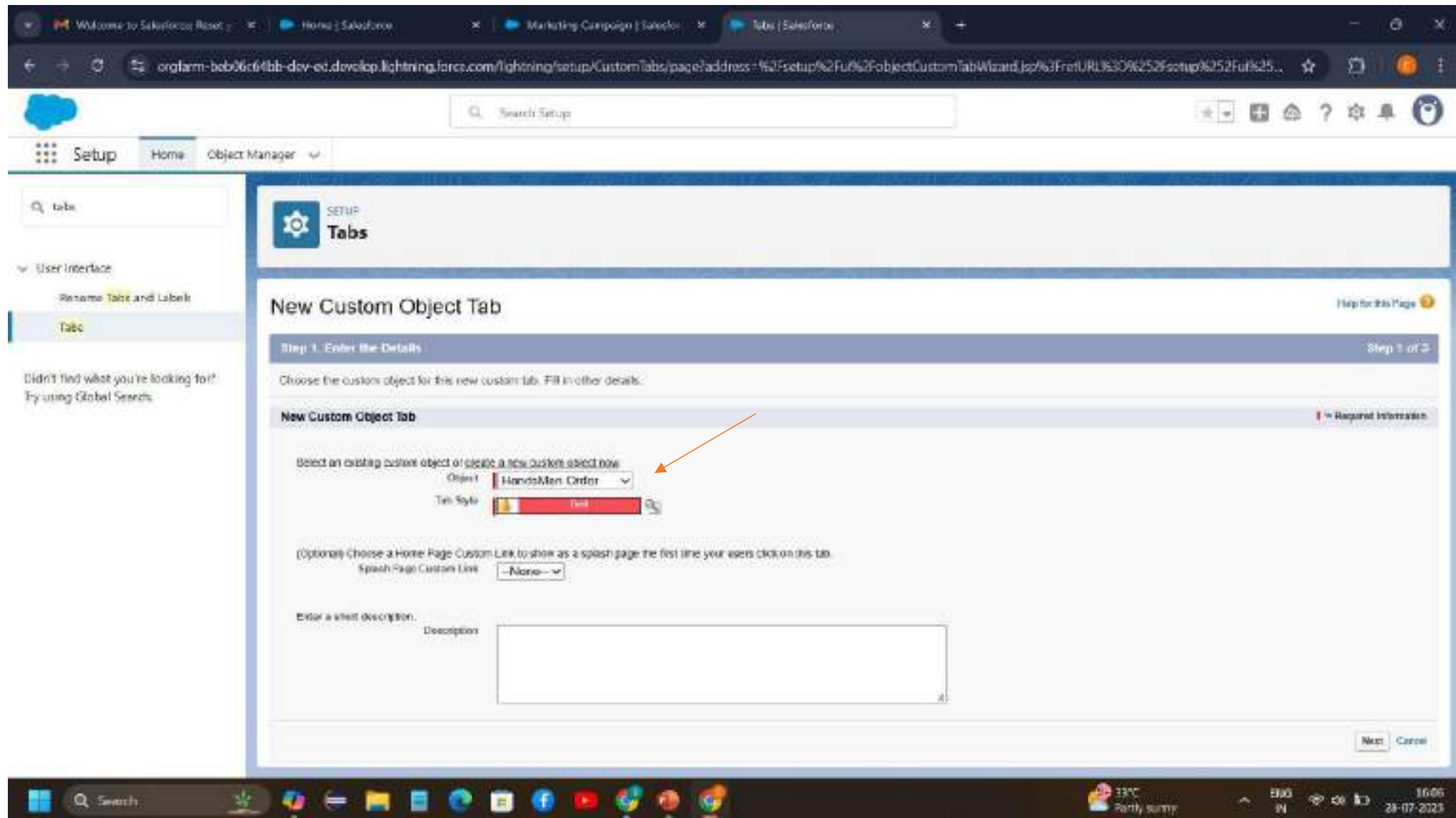
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' entered. The main content area is titled 'Custom Tabs' and includes a description: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.'

There are four sections for creating tabs, each with a 'New' button and a 'What's This?' link:

- Custom Object Tabs:** This section contains a table with two existing tabs: 'HandsMen Customer' and 'HandsMen Products'. The 'New' button is highlighted with a red arrow.
- 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.

Action	Label	Tab Style	Description
edit del	HandsMen Customer	Customer	
edit del	HandsMen Products	Products	

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	

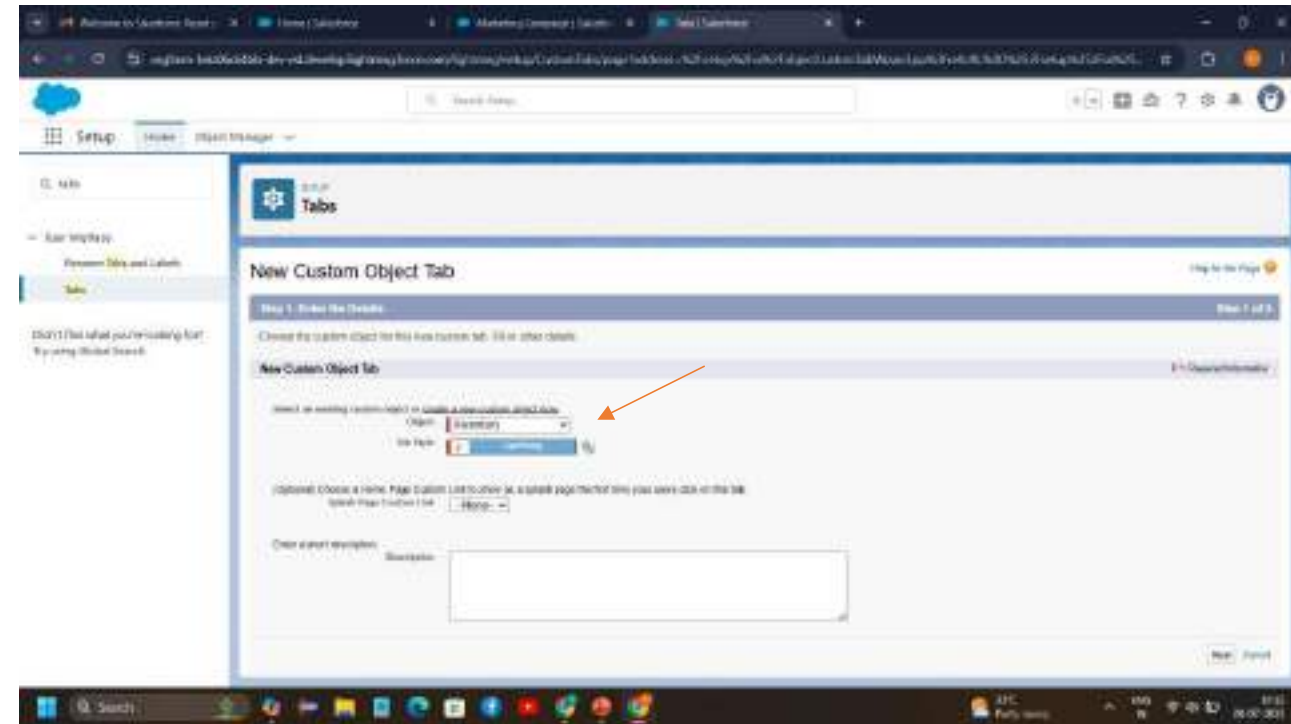
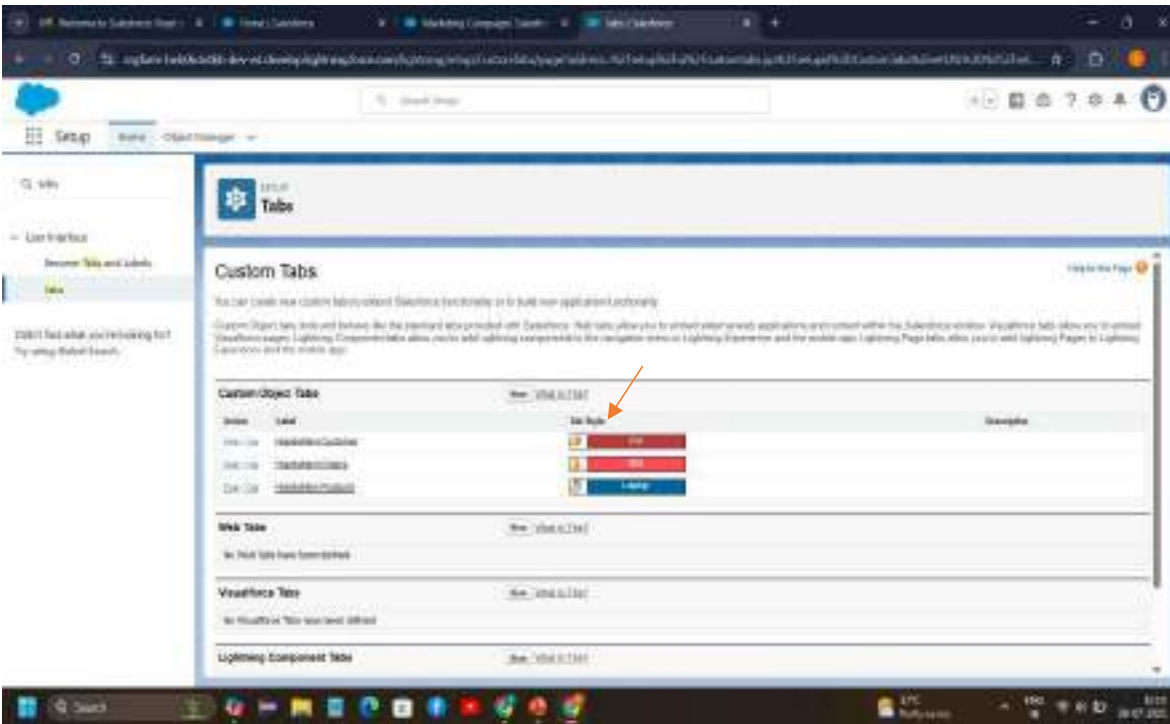
Previous Save Cancel

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.

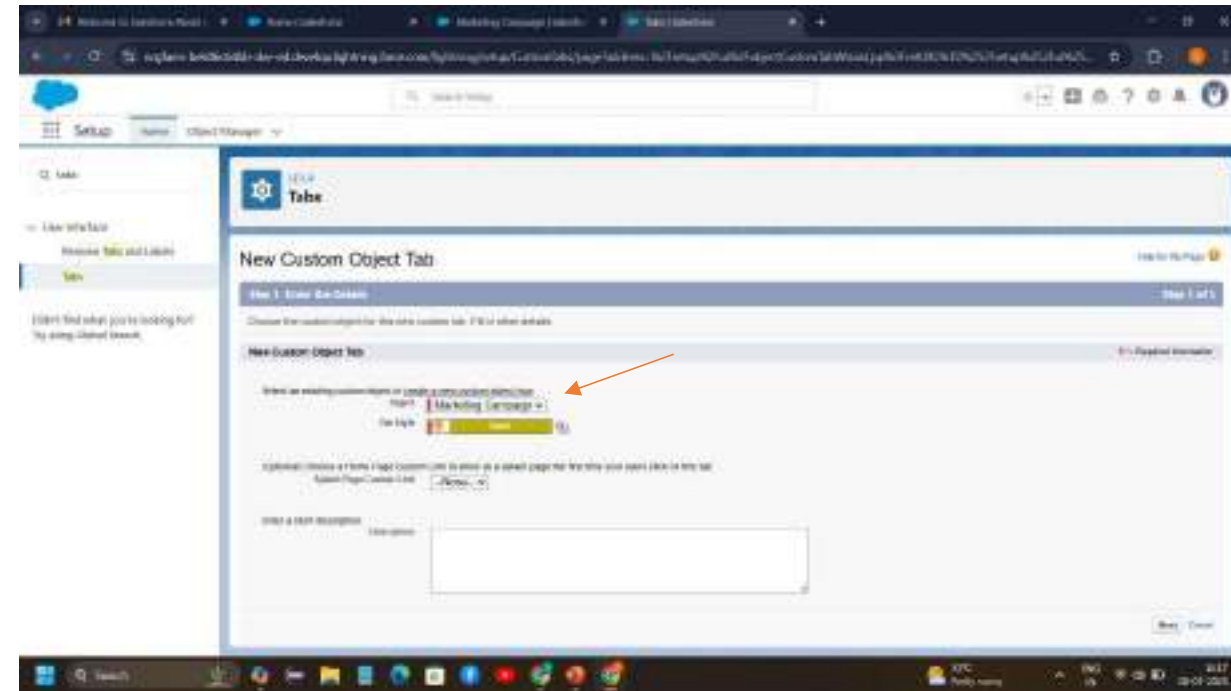
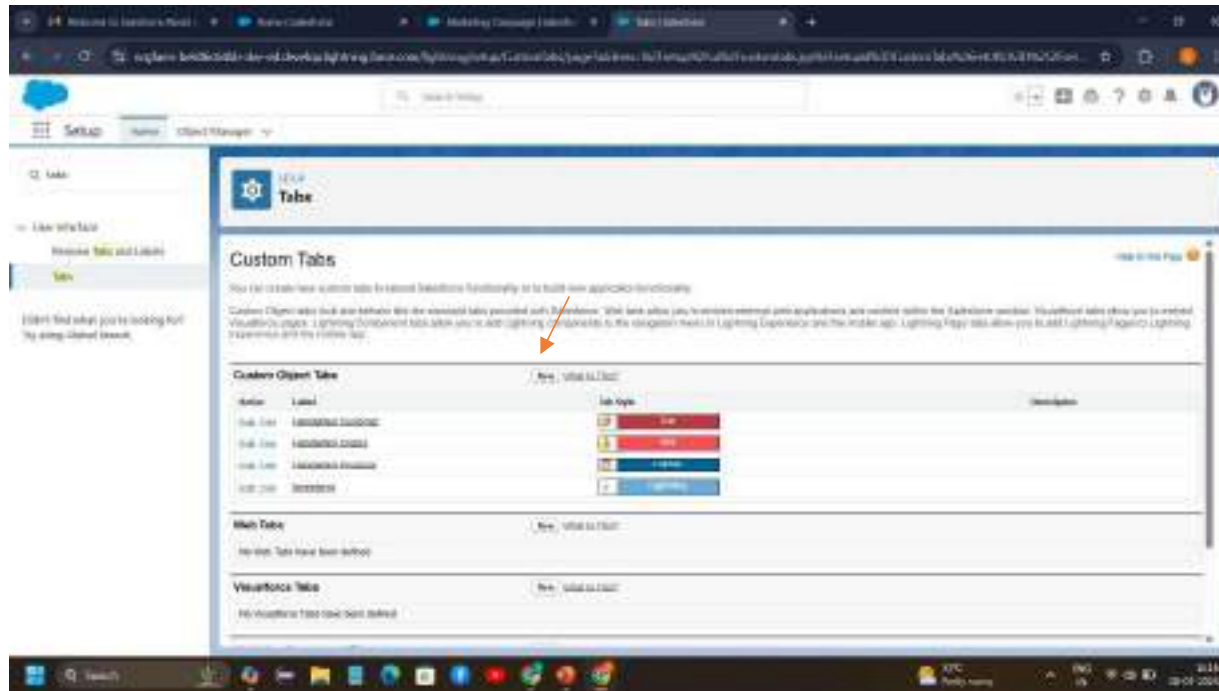


Creating a Custom Tab(Marketing Campaign)

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 Classic	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

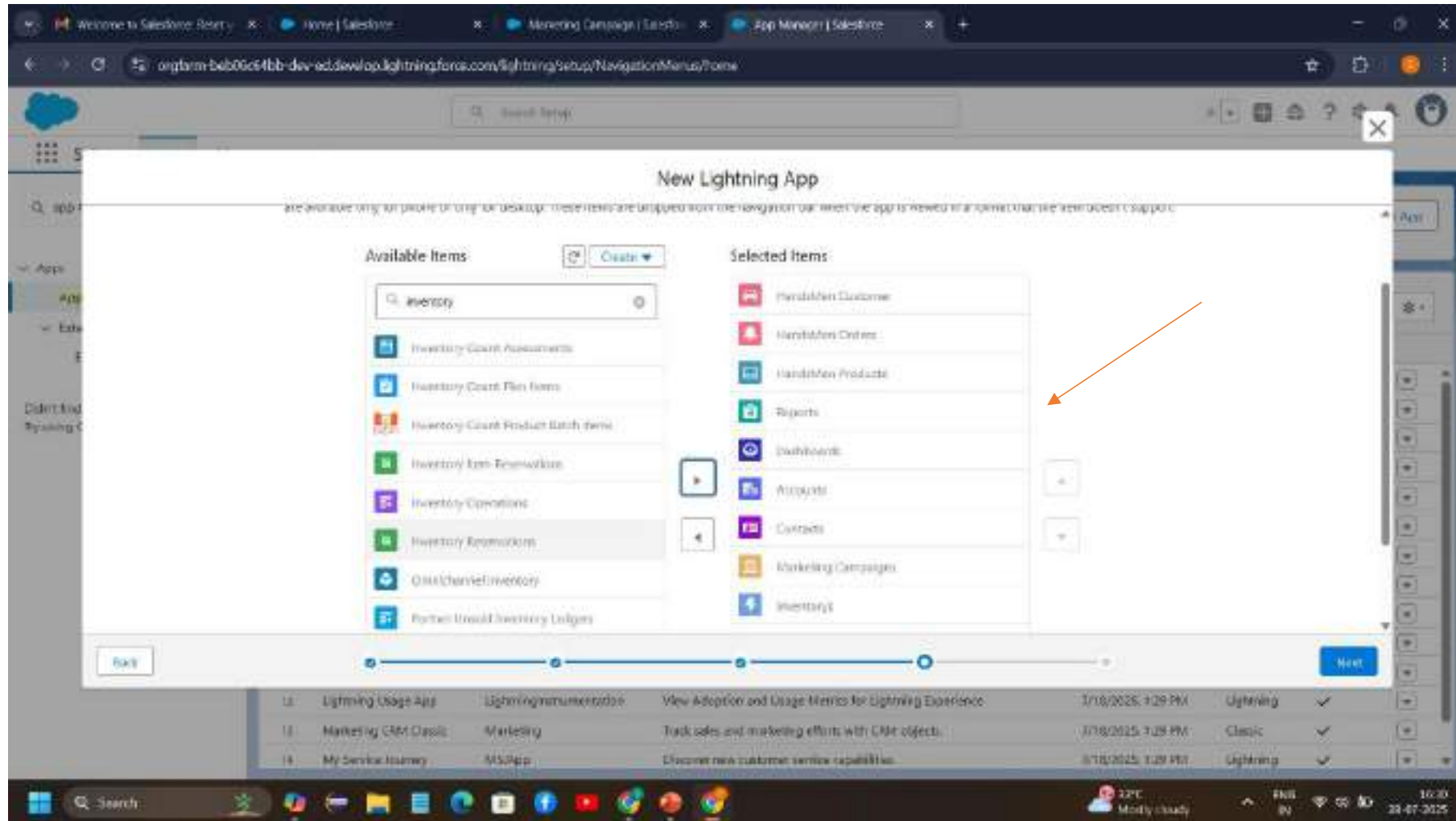
Image : optional (if you want to give any image you can otherwise not mandatory)

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 page. 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 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.

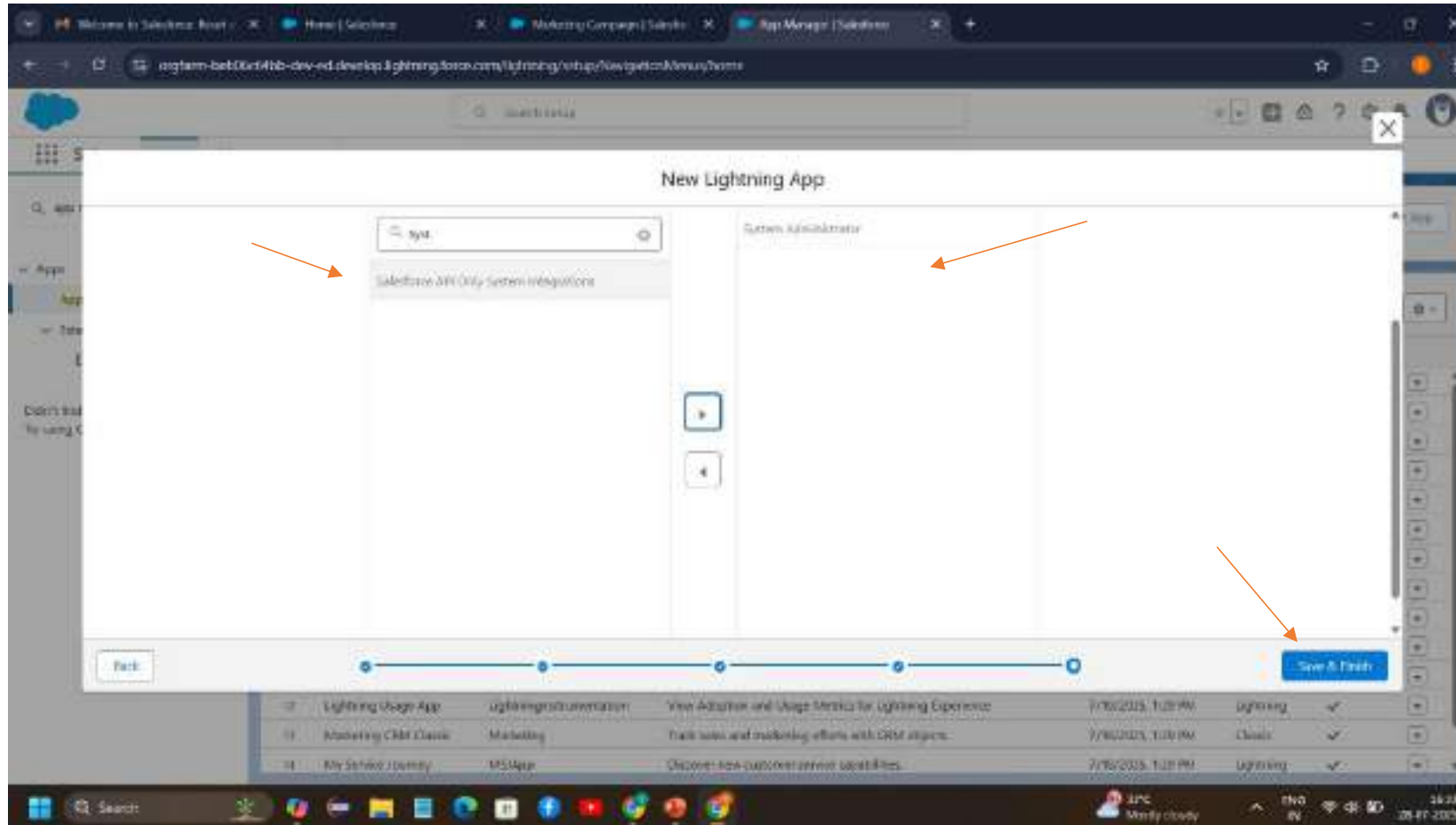
App Name	Developer Name	Description	Image	Primary Color Hex Value
HandsMen Threads	HandsMen_Threads	HandsMen Threads	[Upload]	#0070C2

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



To Add User Profiles:

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



Data Management - Fields

Creating Field in HandsMen Customer Object

To create fields in an object:

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

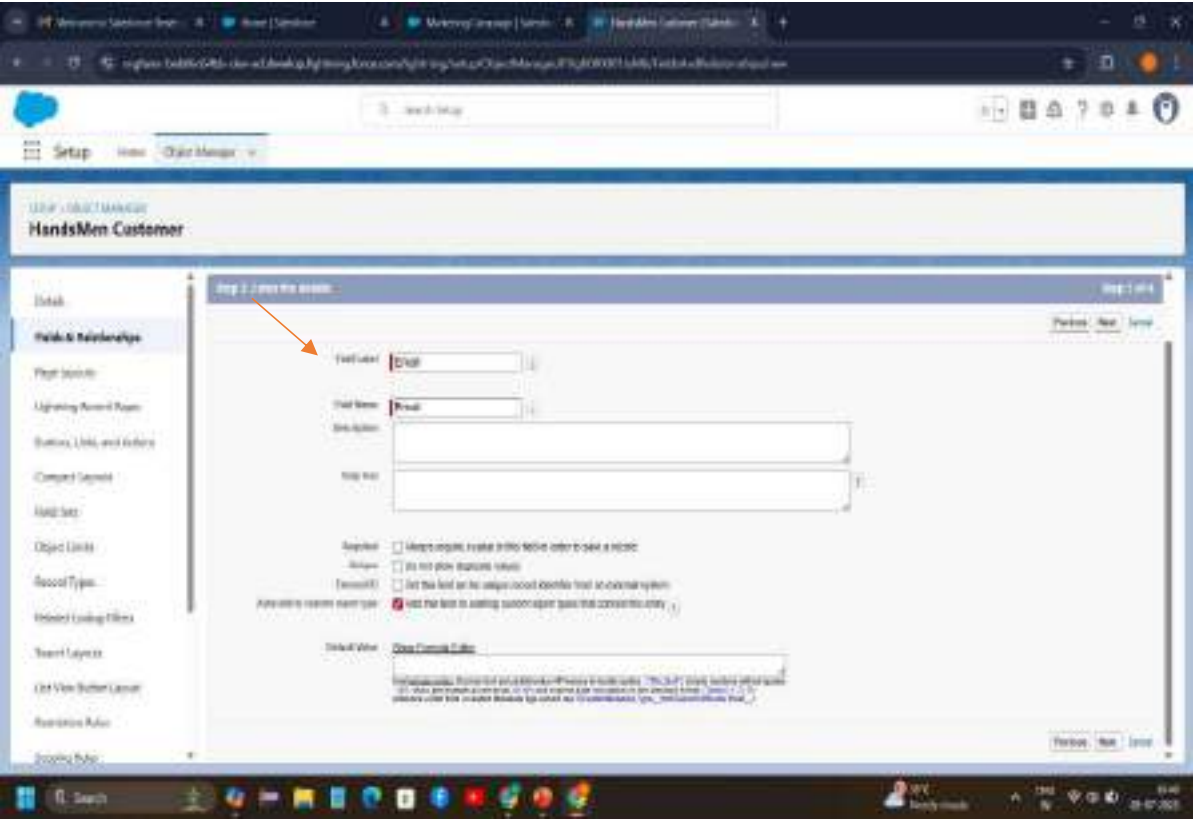
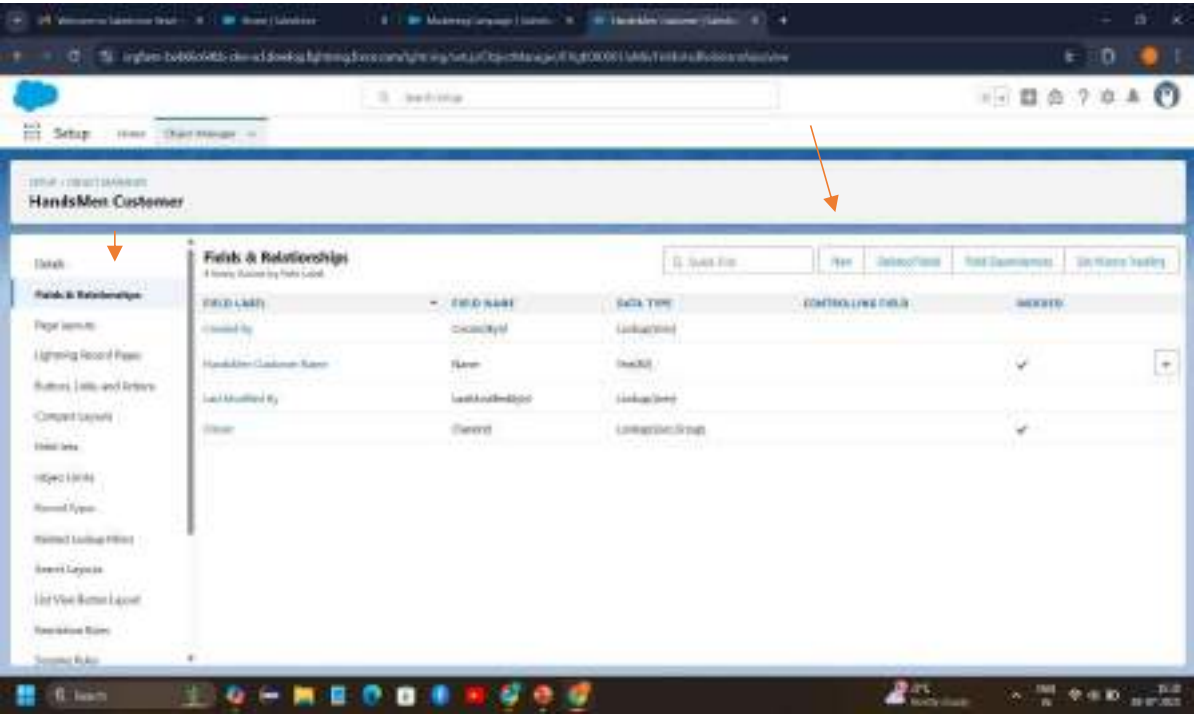
The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the text "Hands" entered. Below the search bar, there is a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains three rows of data:

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

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

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

Now click on “Fields & Relationships” → New

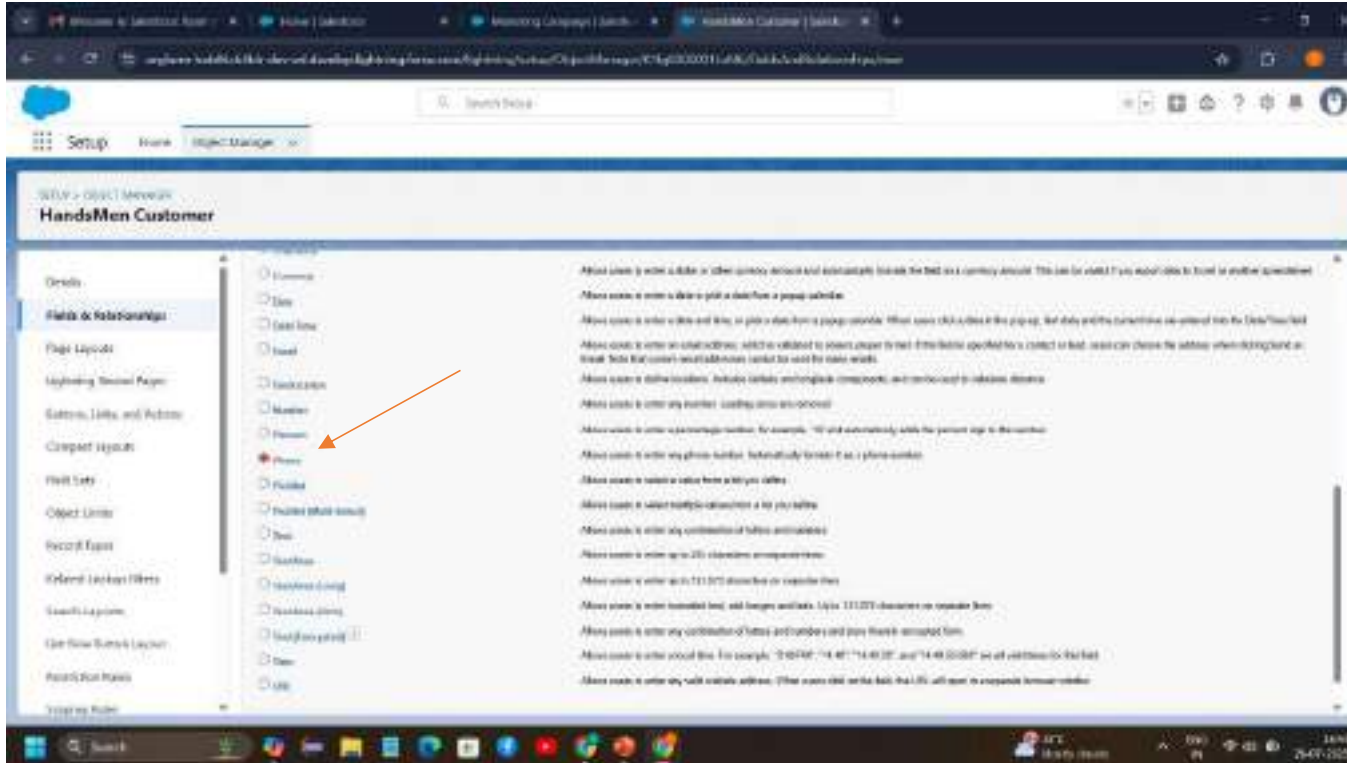


Creating Phone on HandsMen Customer Object

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

Now click on “Fields & Relationships” → New.

Select Data type as “Phone” and click Next.

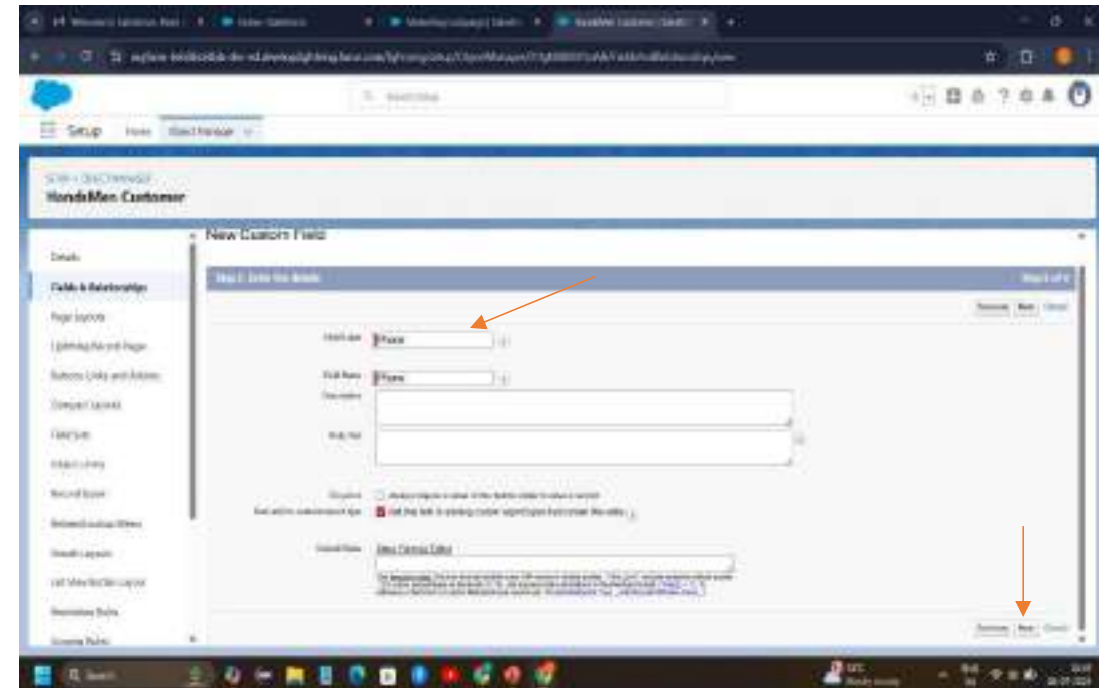


Fill the above as following:

Field Label: Phone.

Field Name : gets auto generated.

Click on Next → Next → Save and new.



Creating Picklist field on HandsMen Customer object.

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

Now click on “Fields & Relationships” → New.

Select Data type as “Picklist” and click Next.

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

Gold
Silver
Bronze

The screenshot shows the Salesforce Object Manager interface for the 'HandsMen Customer' object. The 'Fields & Relationships' section is active, and a new field is being created. The 'Field Label' is 'Loyalty Status'. The 'Values' section is set 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.

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.

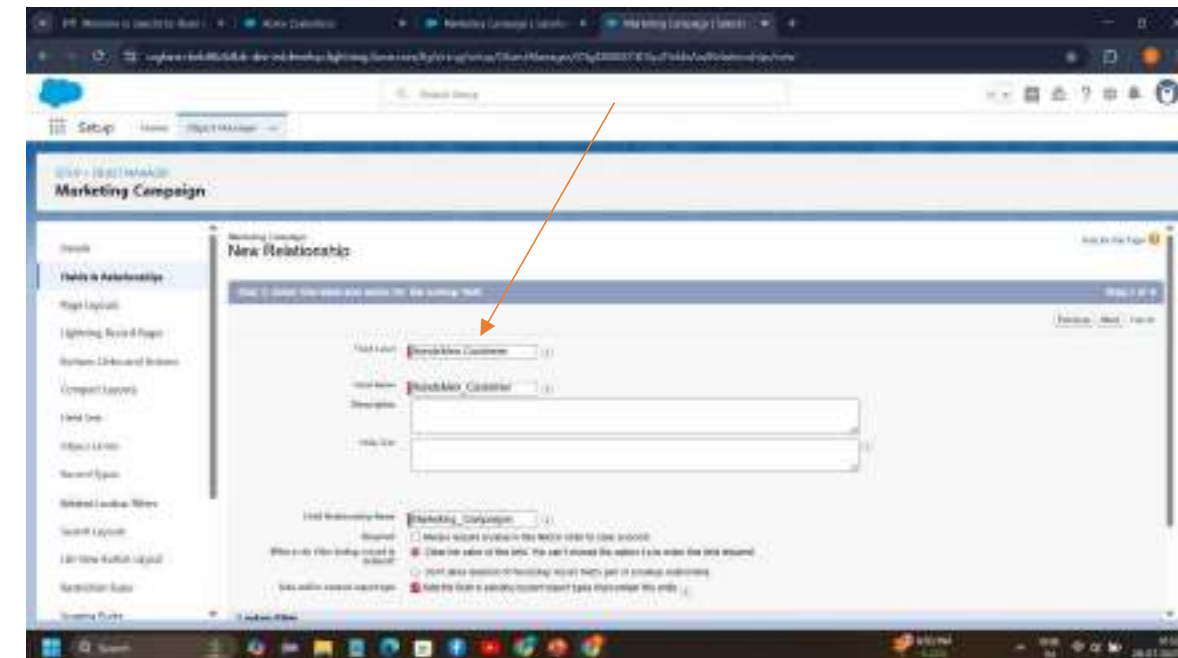
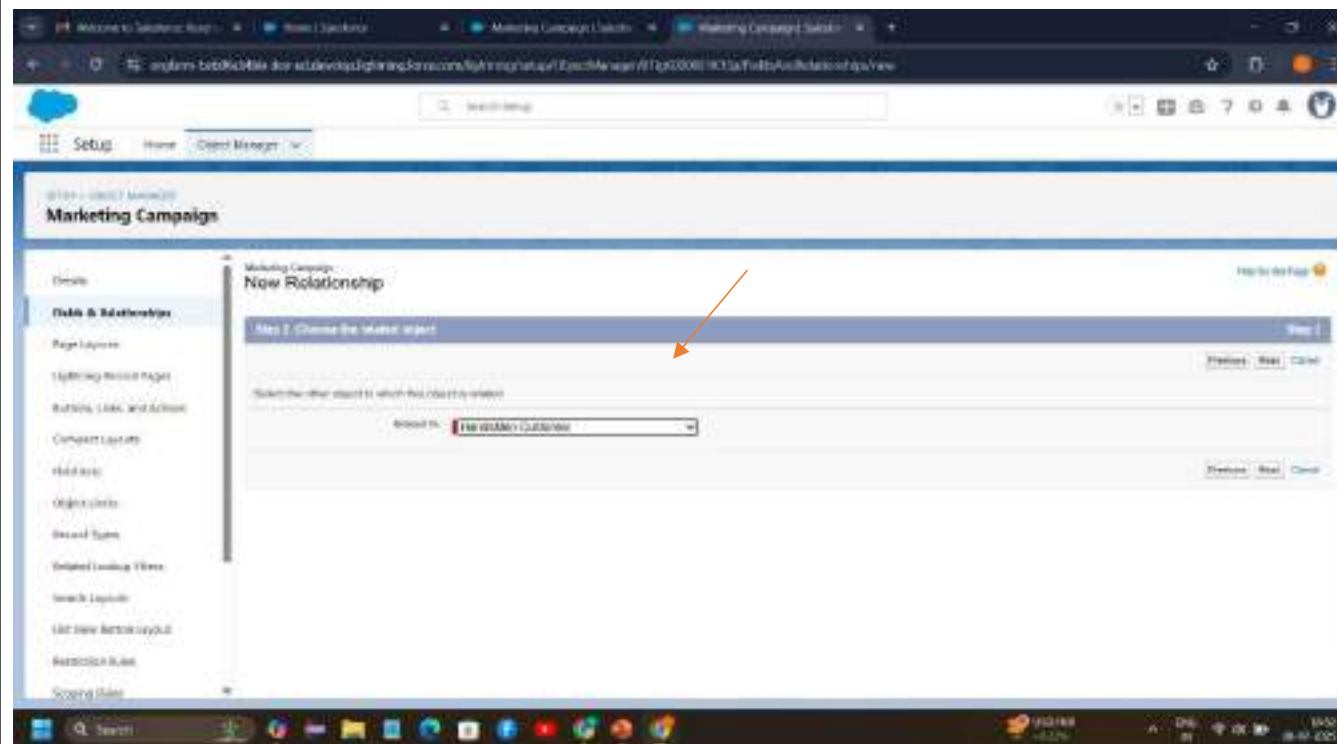
Click on fields & relationship → click on New.

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.

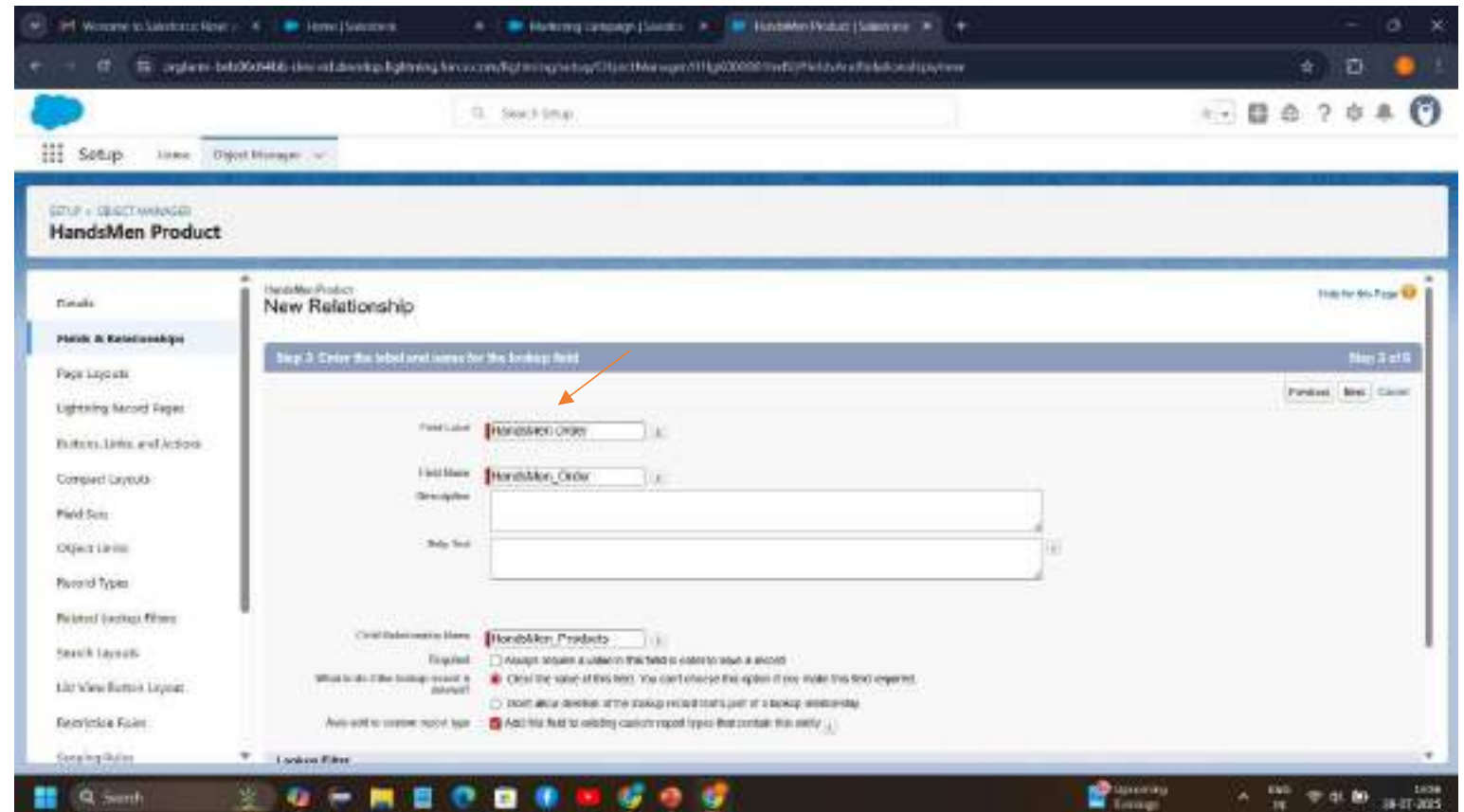
Click on fields & relationship → click on New.

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.

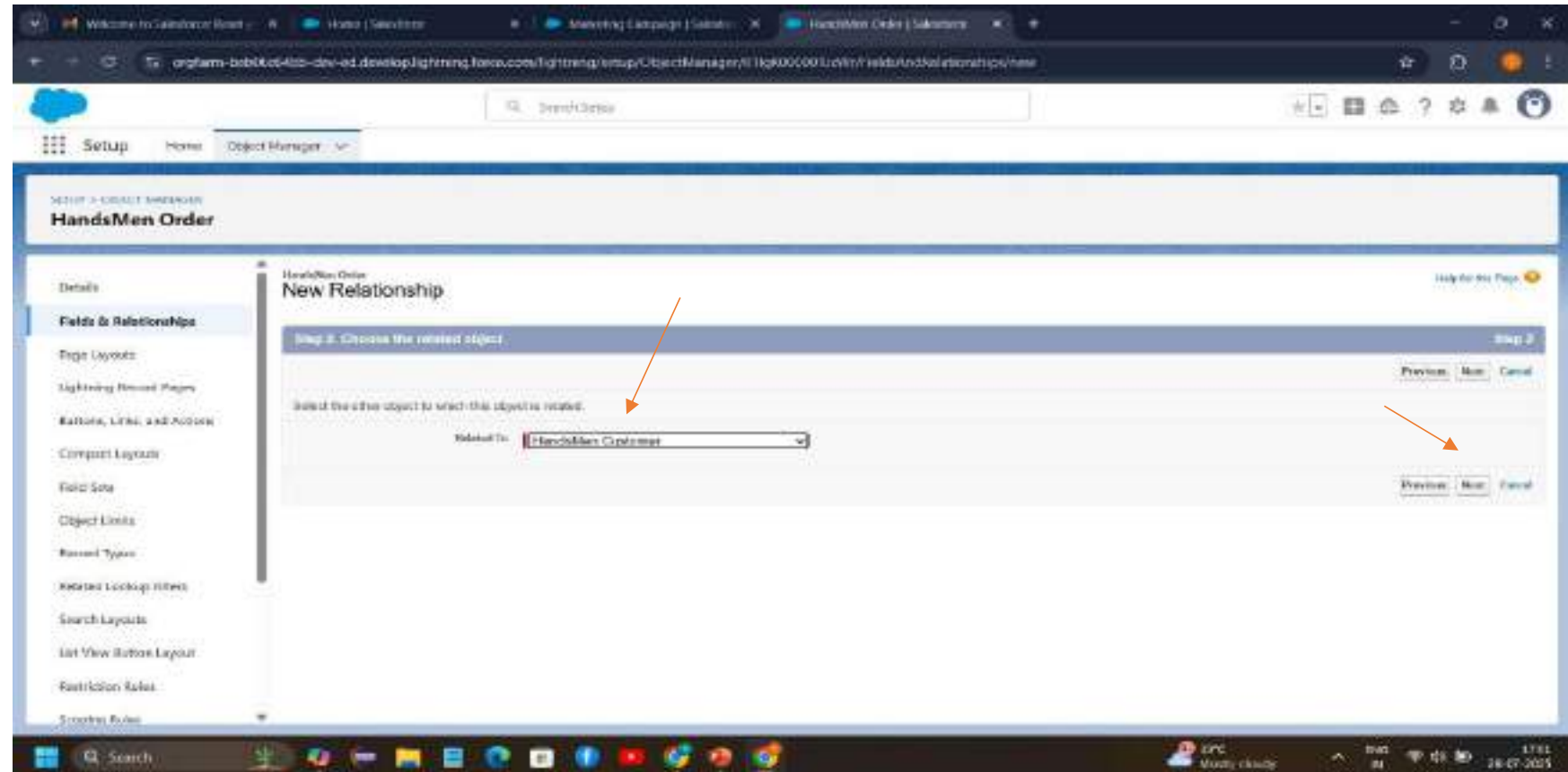
Click on fields & relationship → click on New.

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.

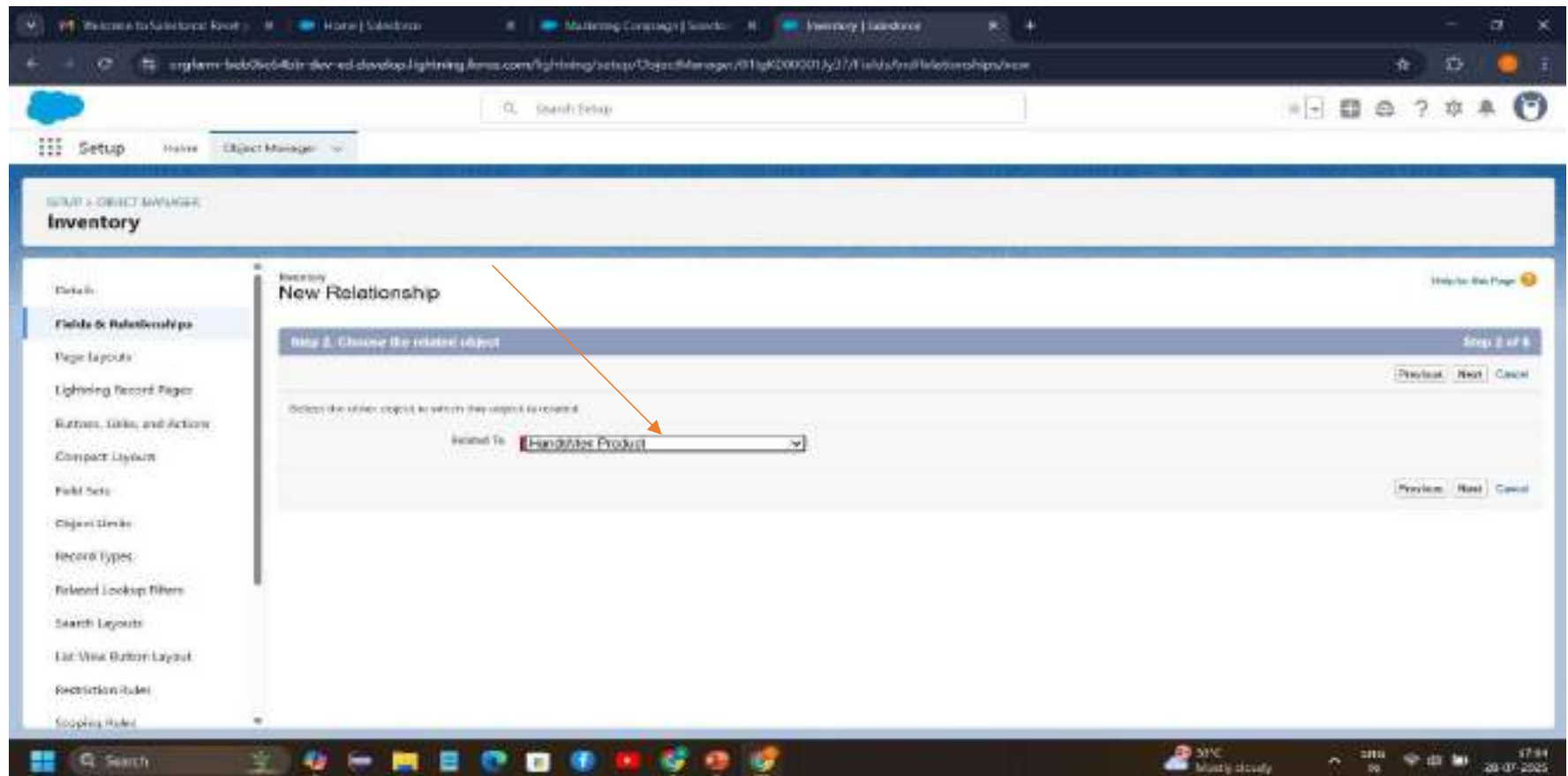
Click on fields & relationship → click on New.

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.



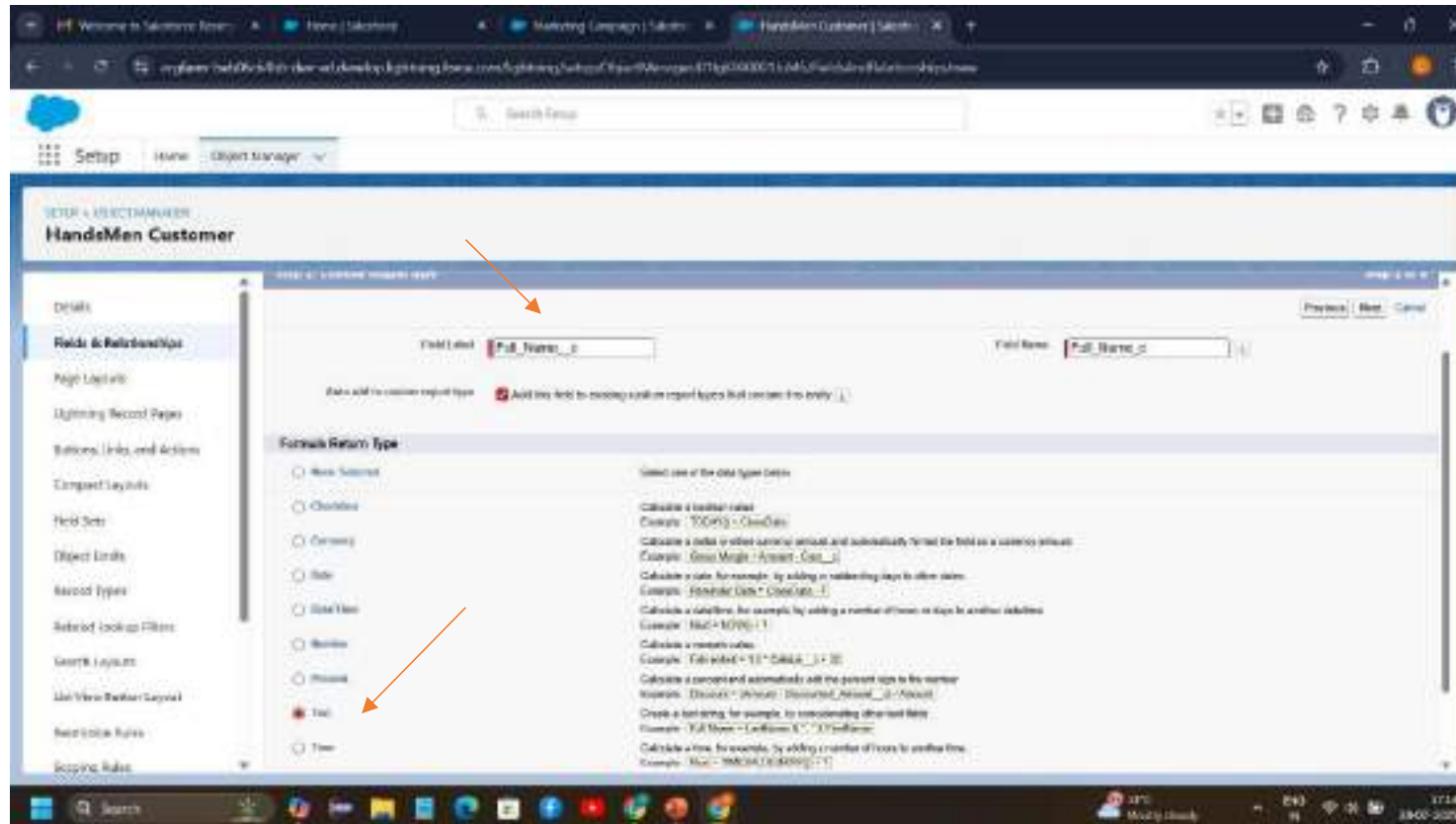
Formula Fields

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

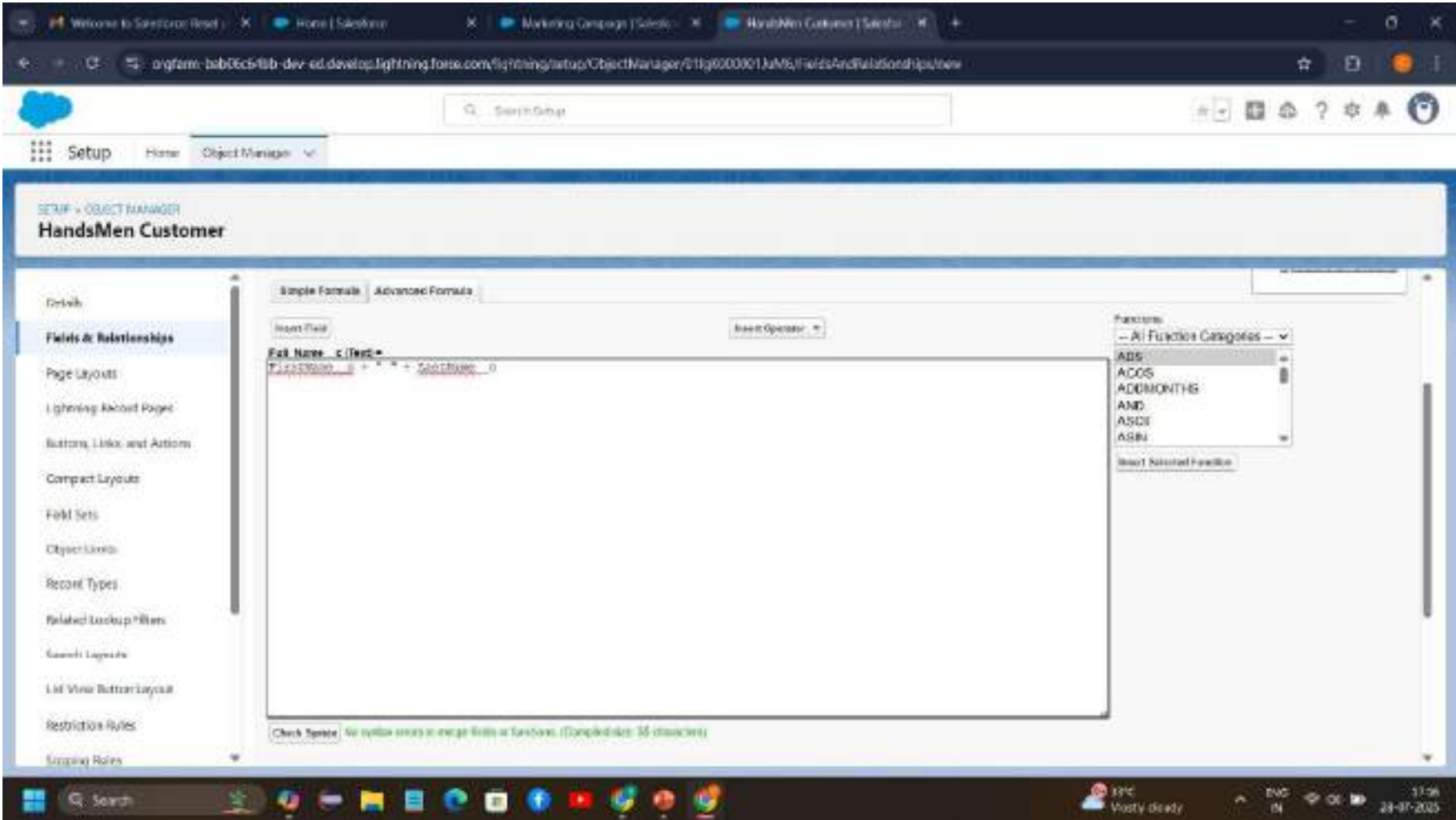
Click on fields & relationship → click on New.

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:

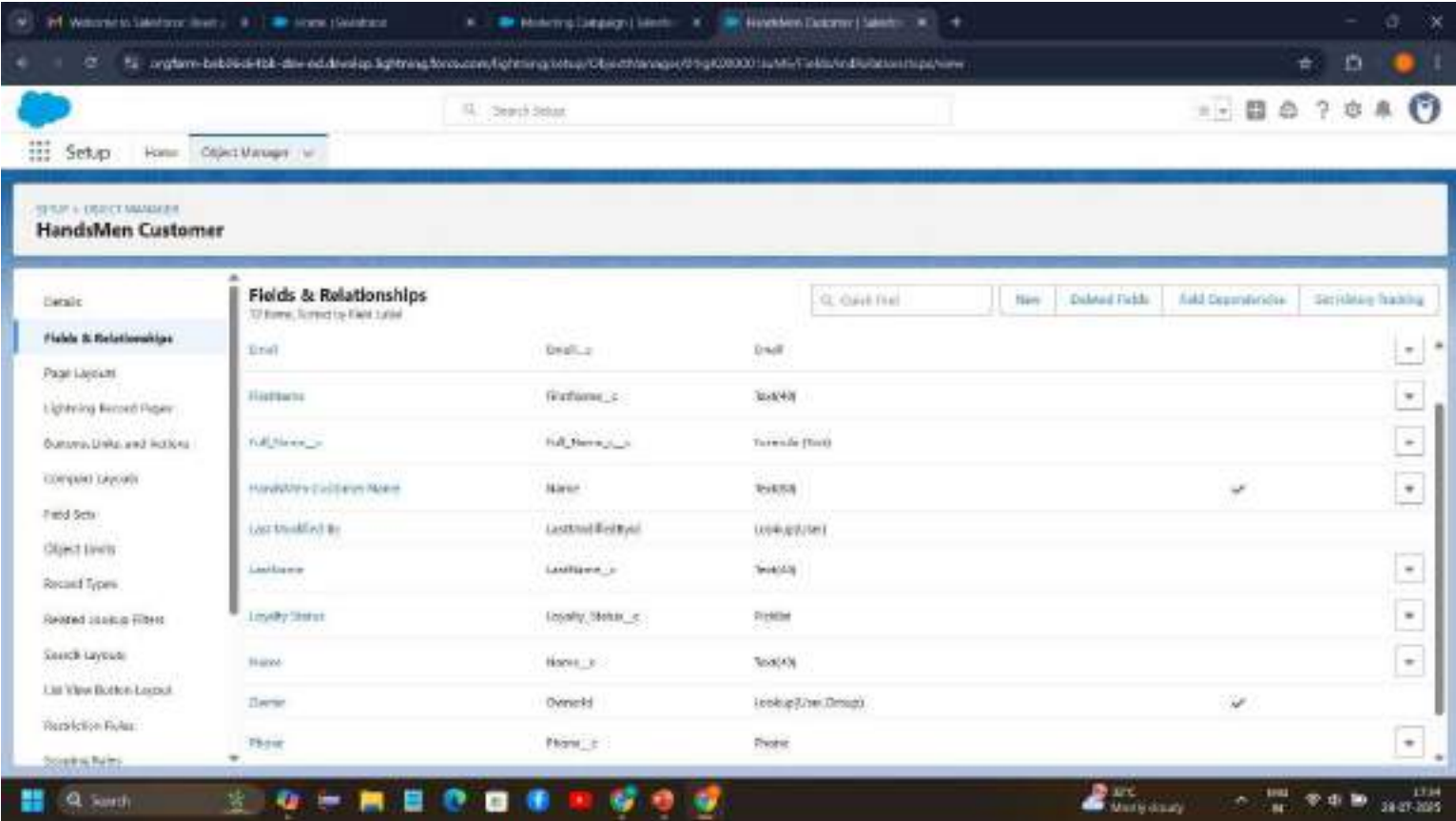
Name (Record Name),

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

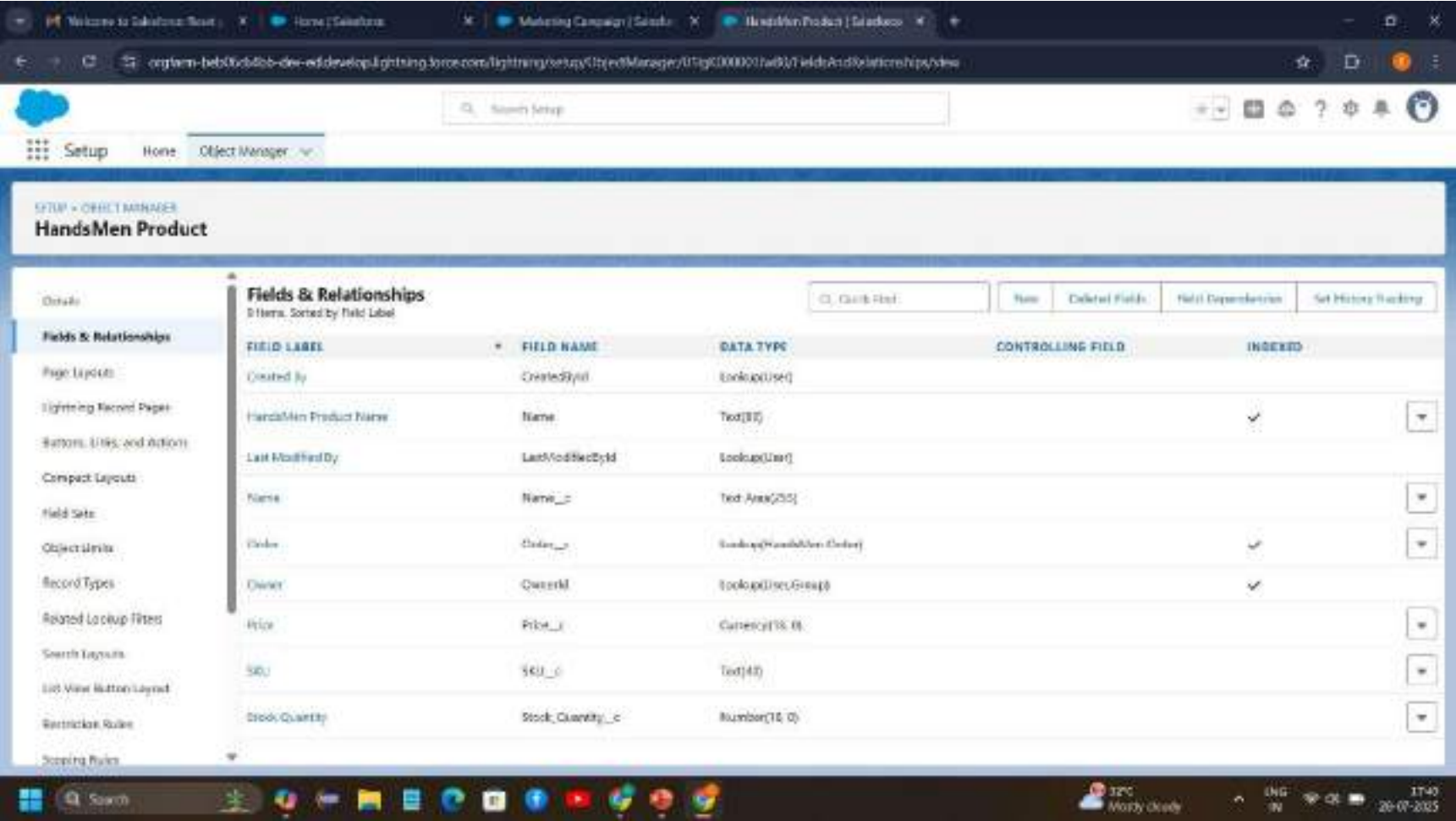
Description: Stores product catalog

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

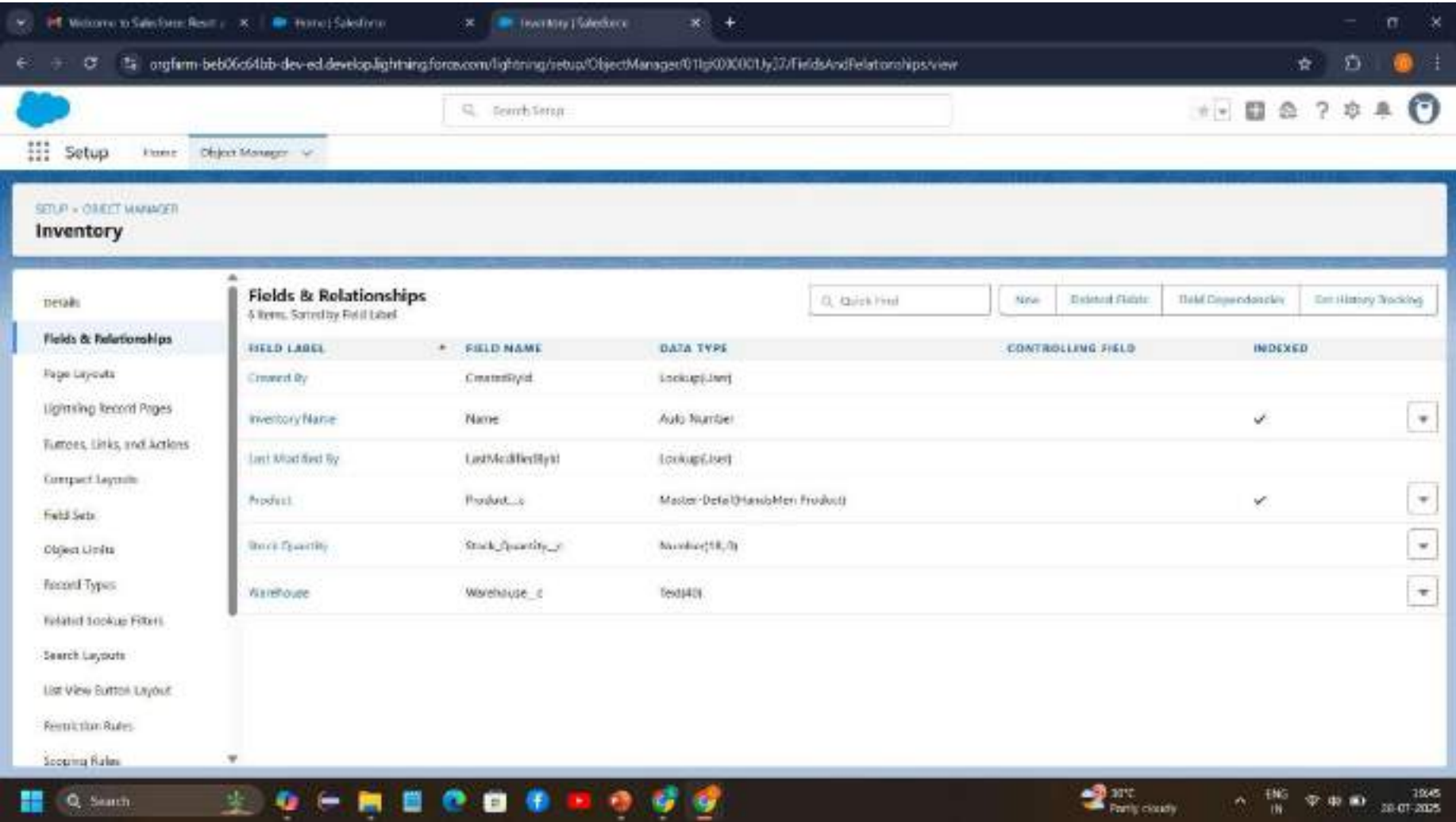
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(HandsMen Customer)		✓
HandsMen Order Name	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Quantity	Quantity__c	Number(18,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

Object Name: Inventory__c

Type: Custom Object

Description: Tracks inventory levels

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



Object Name: Marketing_Campaign__c

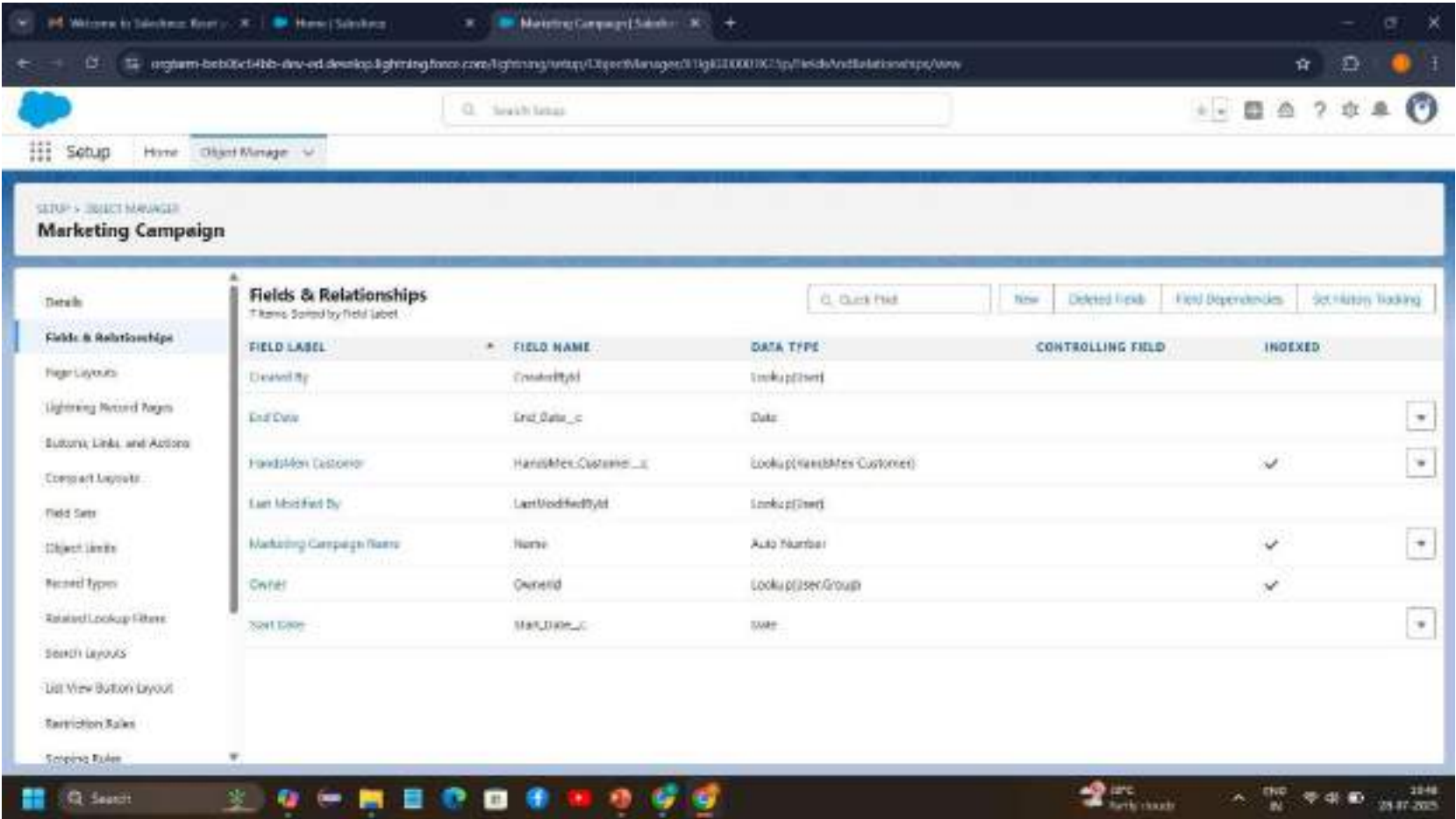
Type: Custom Object

Description: Manages promotions & campaigns

Key Fields:Campaign_Name (Record Name),

Start_Date (Date),

End_Date (Date)



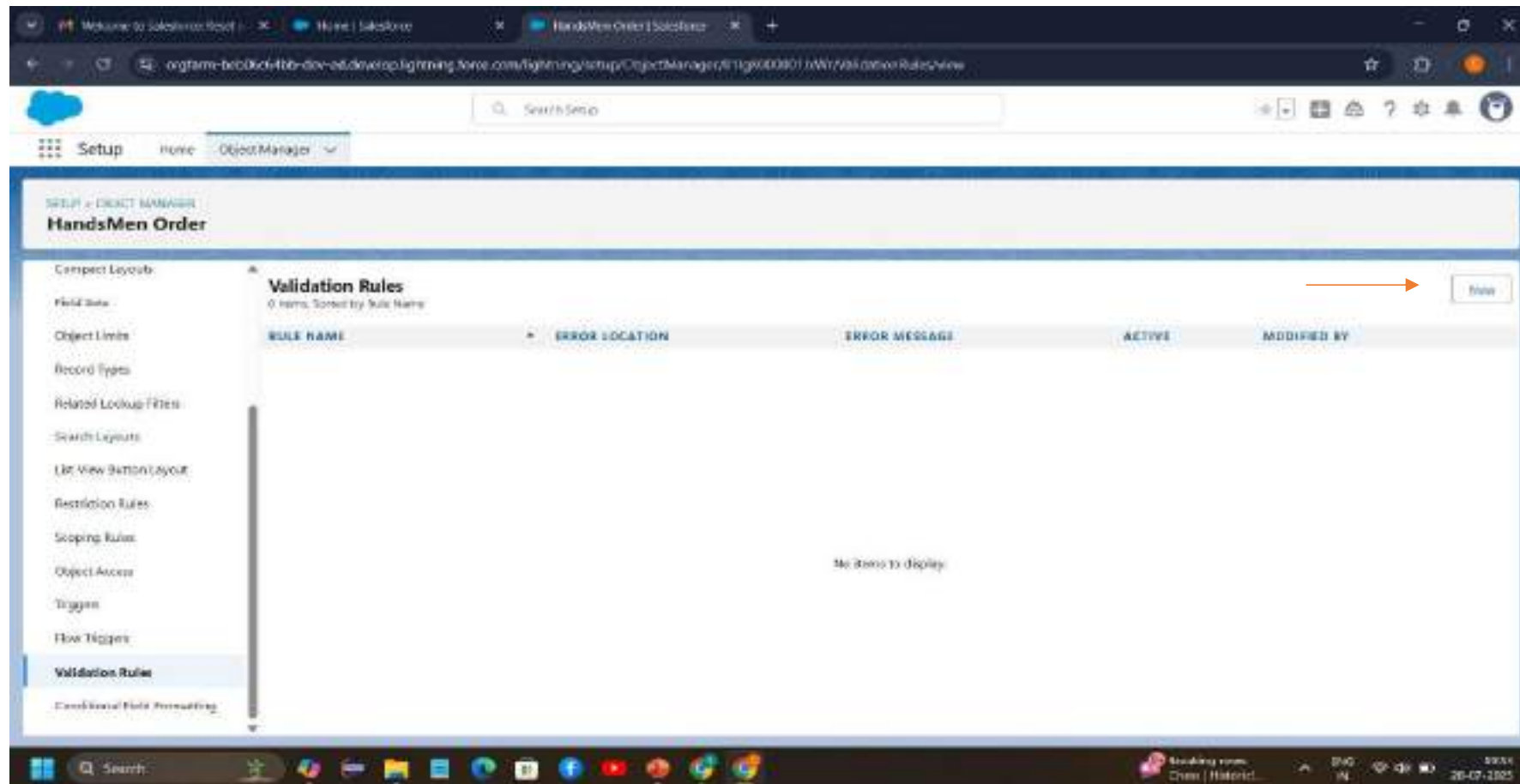
The screenshot shows the Salesforce Lightning Setup interface for the 'Marketing Campaign' custom object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object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

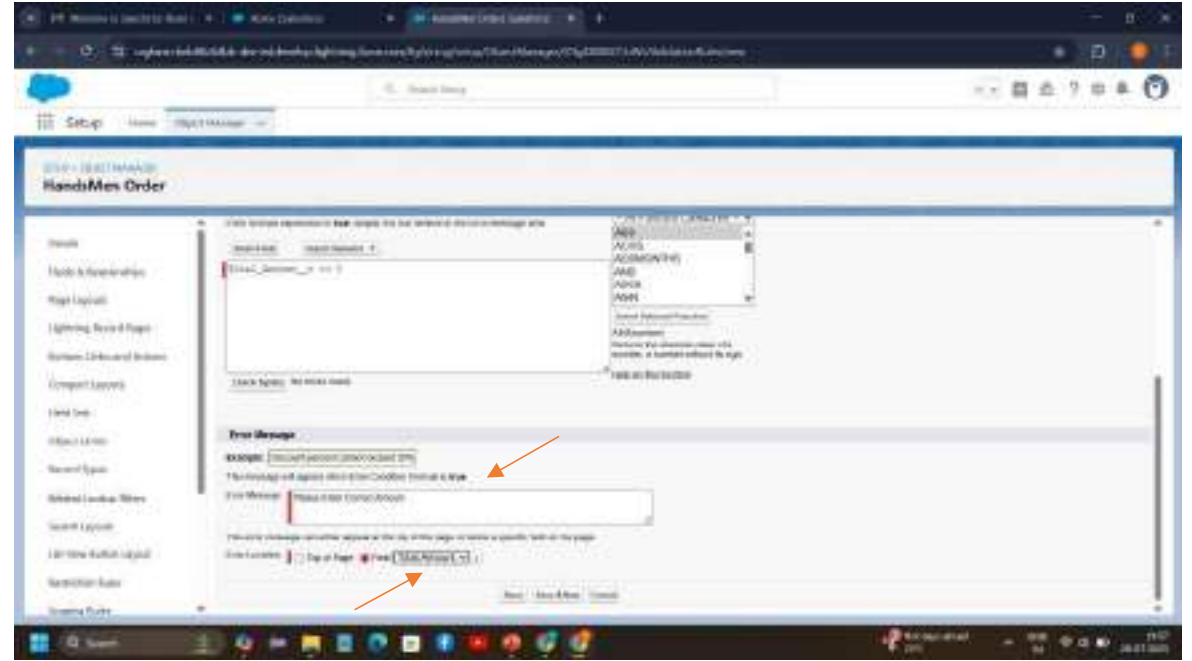
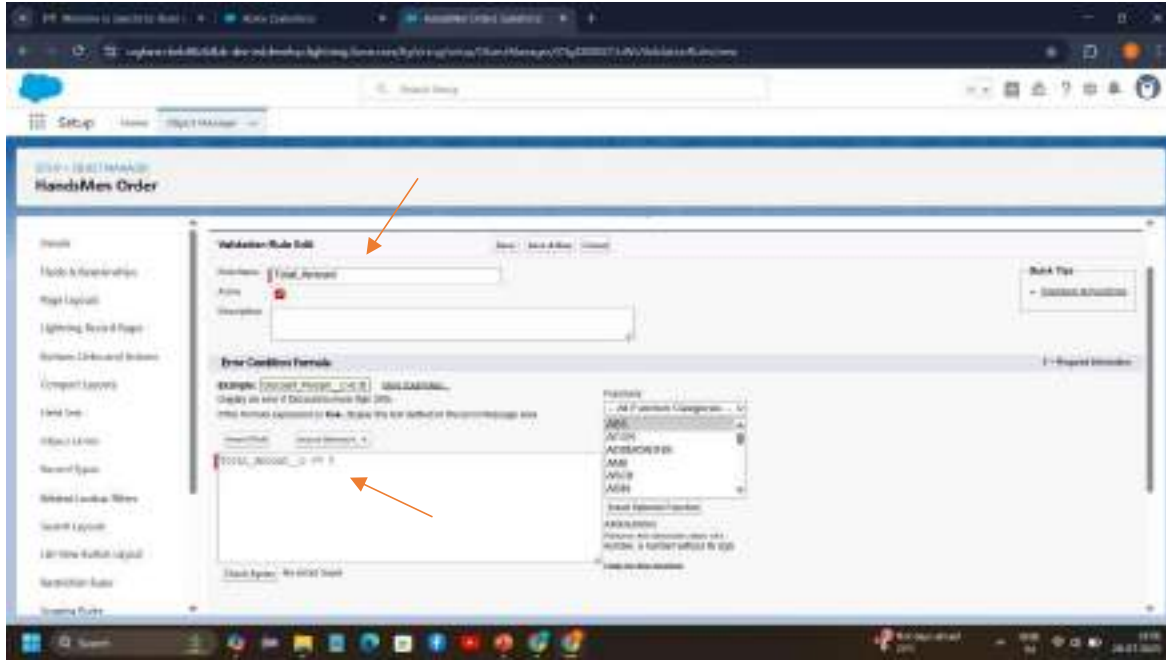
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup (User)		
End Date	End_Date__c	Date		
HandledBy Customer	HandledByCustomer__c	Lookup (HandledBy Customer)		✓
Last Modified By	LastModifiedBy	Lookup (User)		
Marketing Campaign Name	Name	Auto Number		✓
Owner	OwnerId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

Data Configuration

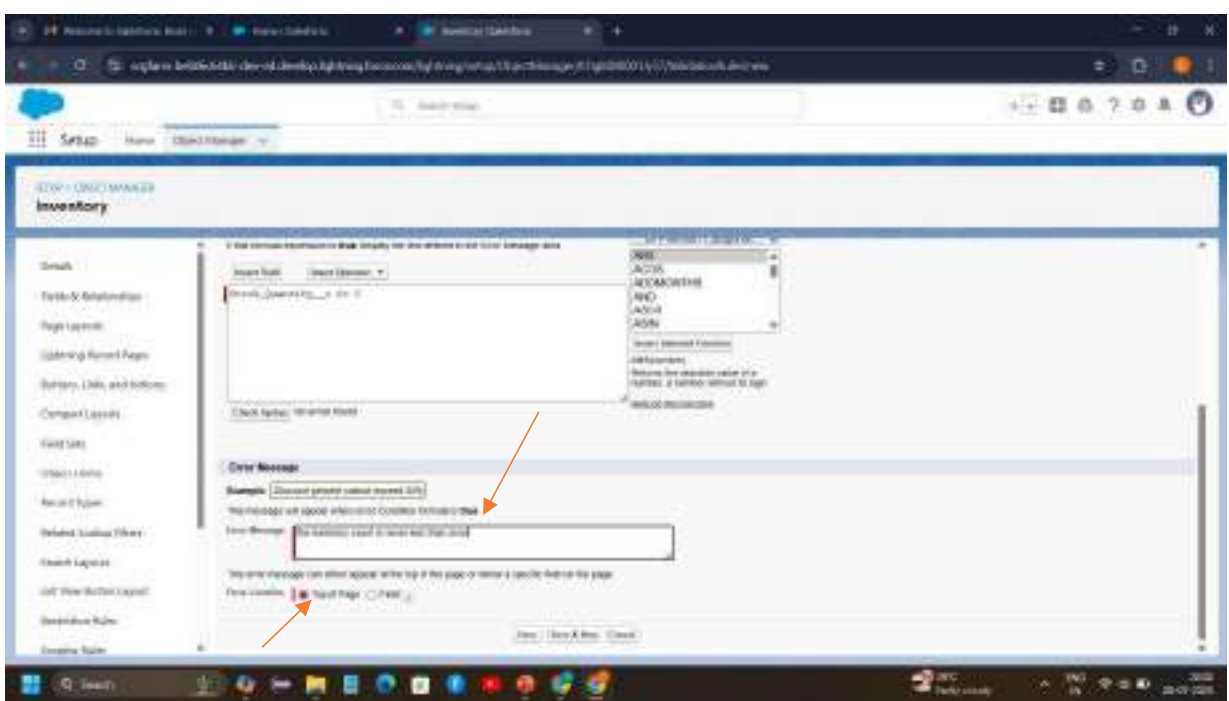
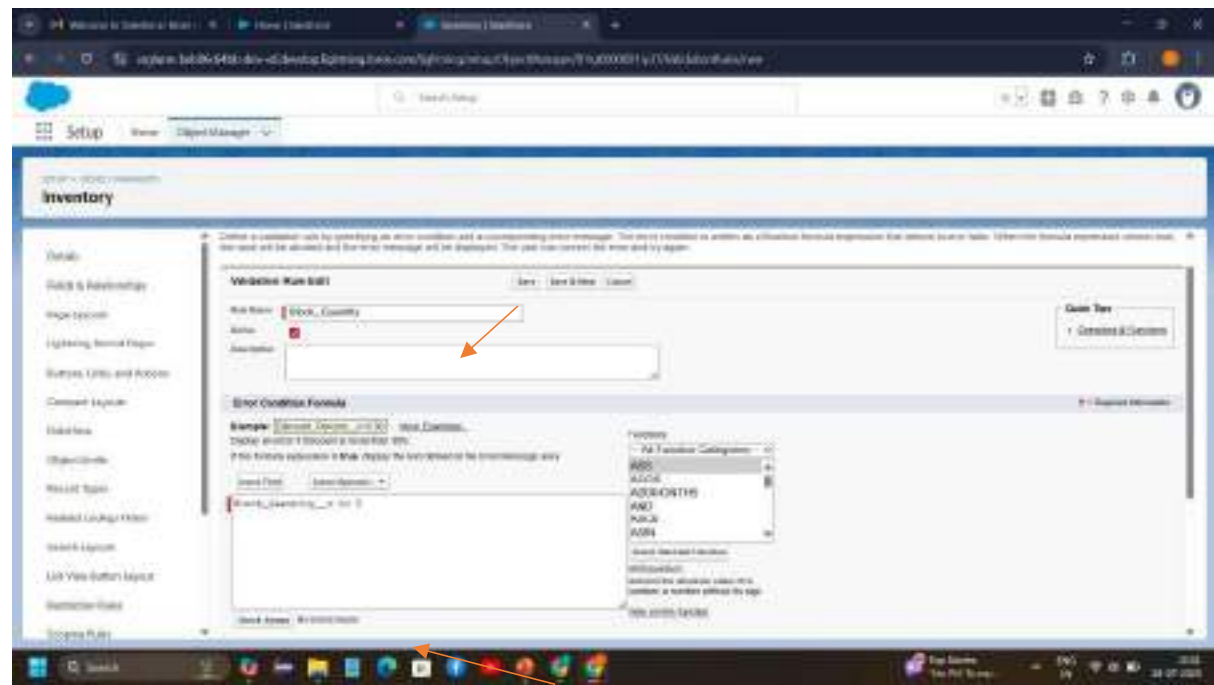
Activity 1 : Creating the validation rule

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





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



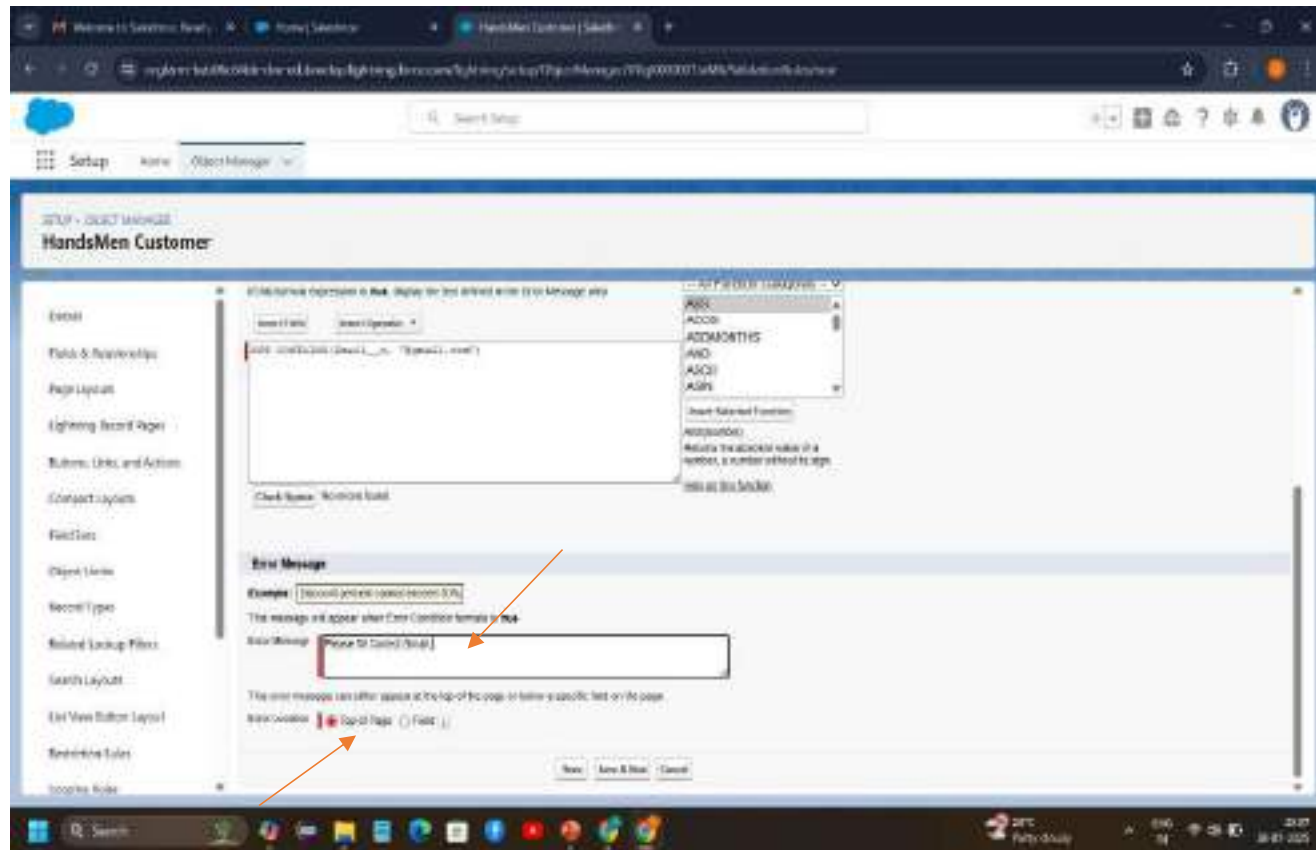
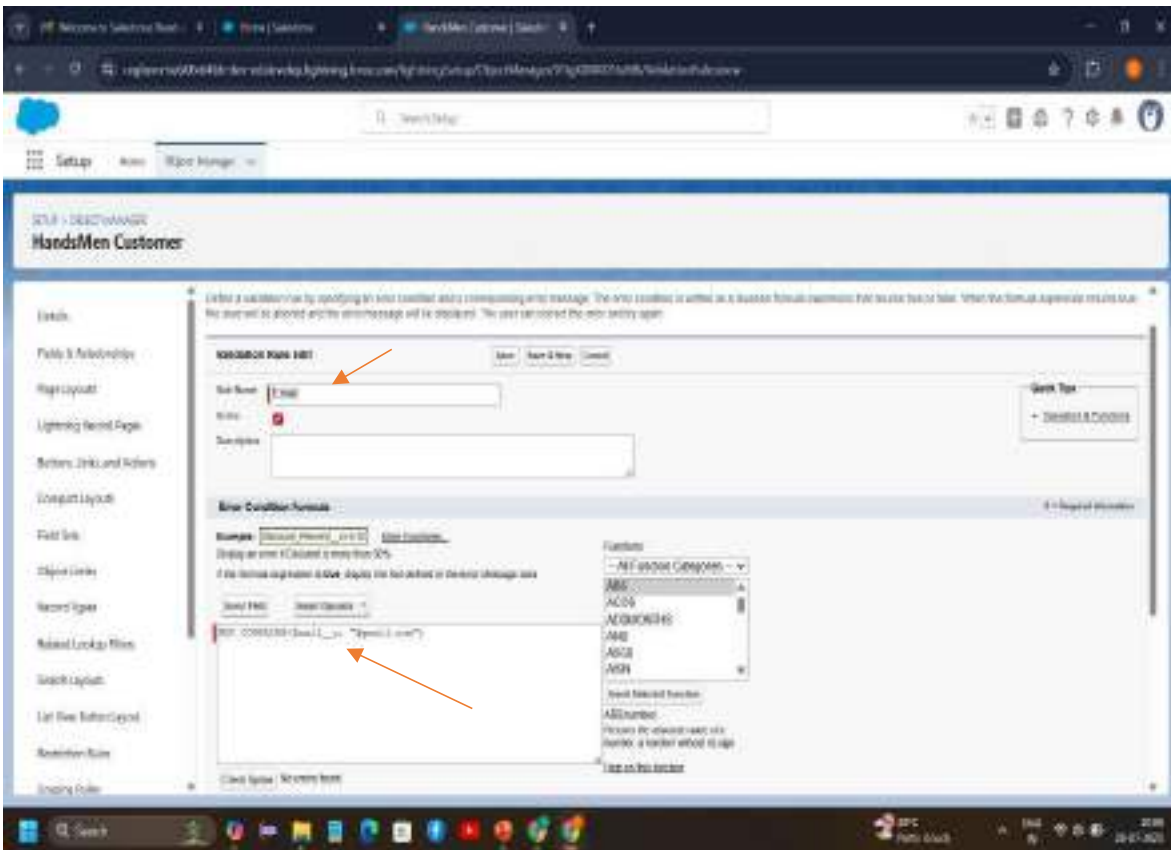
Create Validation rule for HandsMen Customer object.

Enter Rule name as “Email”.

Insert the Error Condition Formula as :-

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

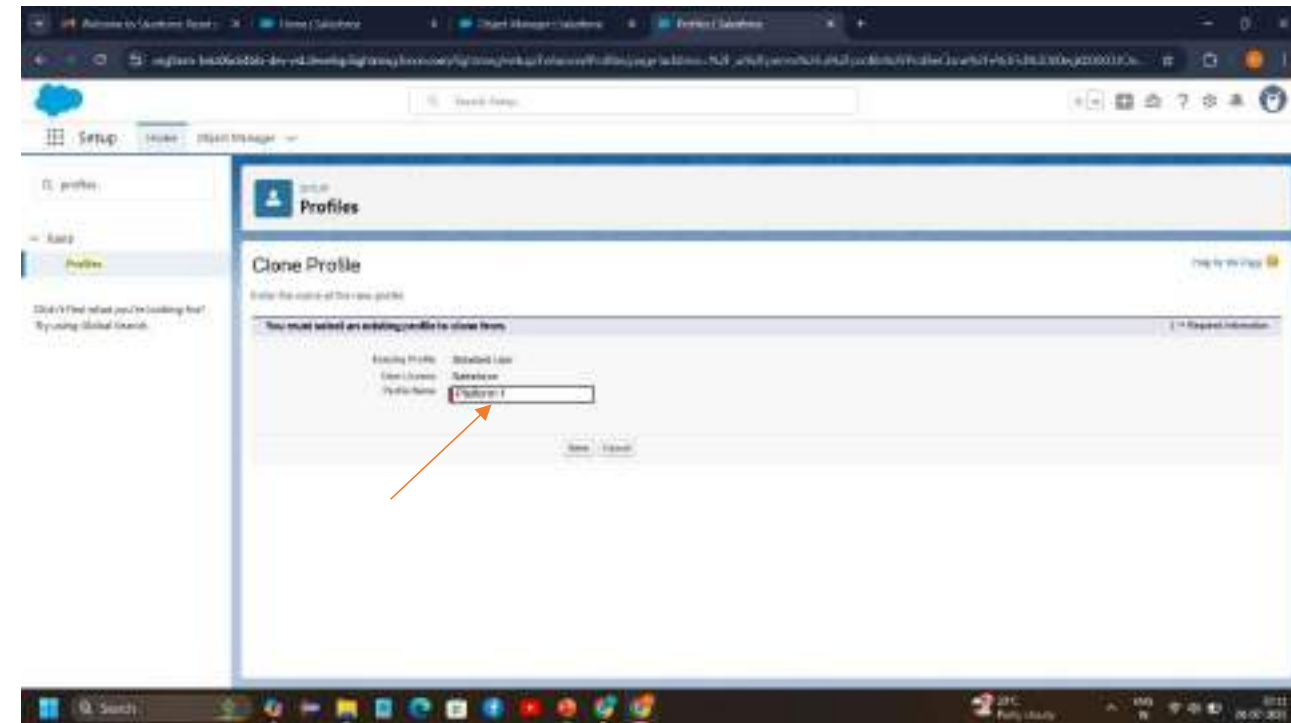
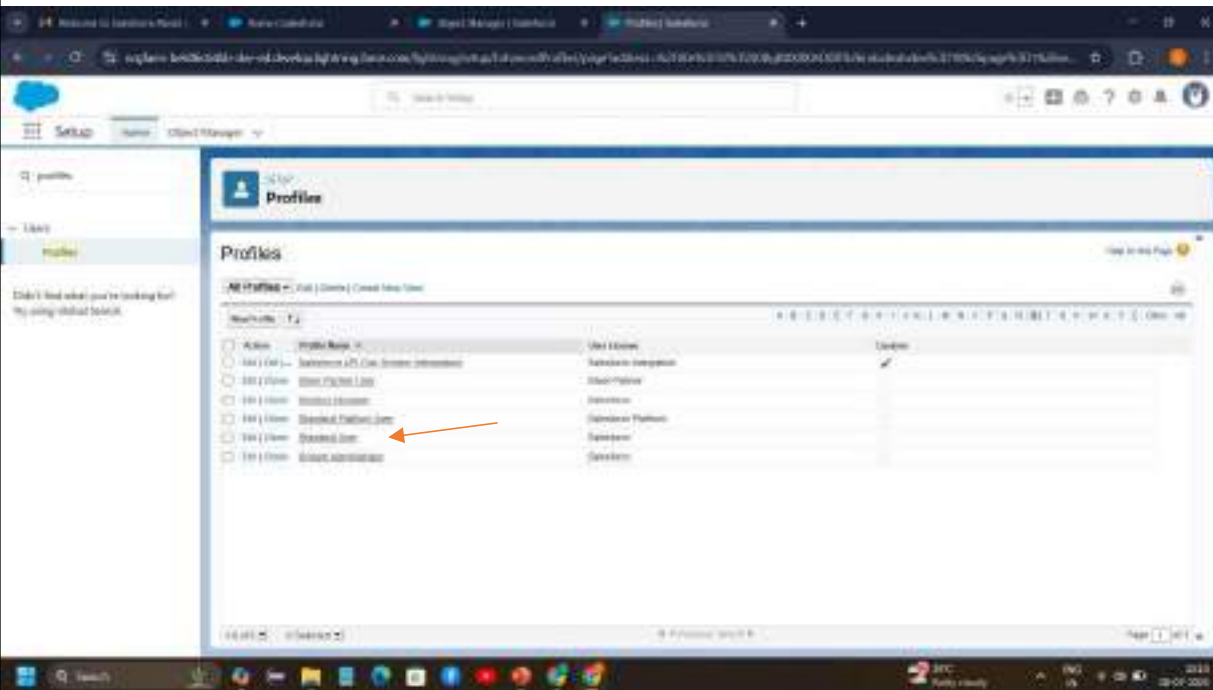
Enter the Error Message as “Please fill Correct Gmail”, select the Error location as Top of Page and click Save.



Profile - Sales

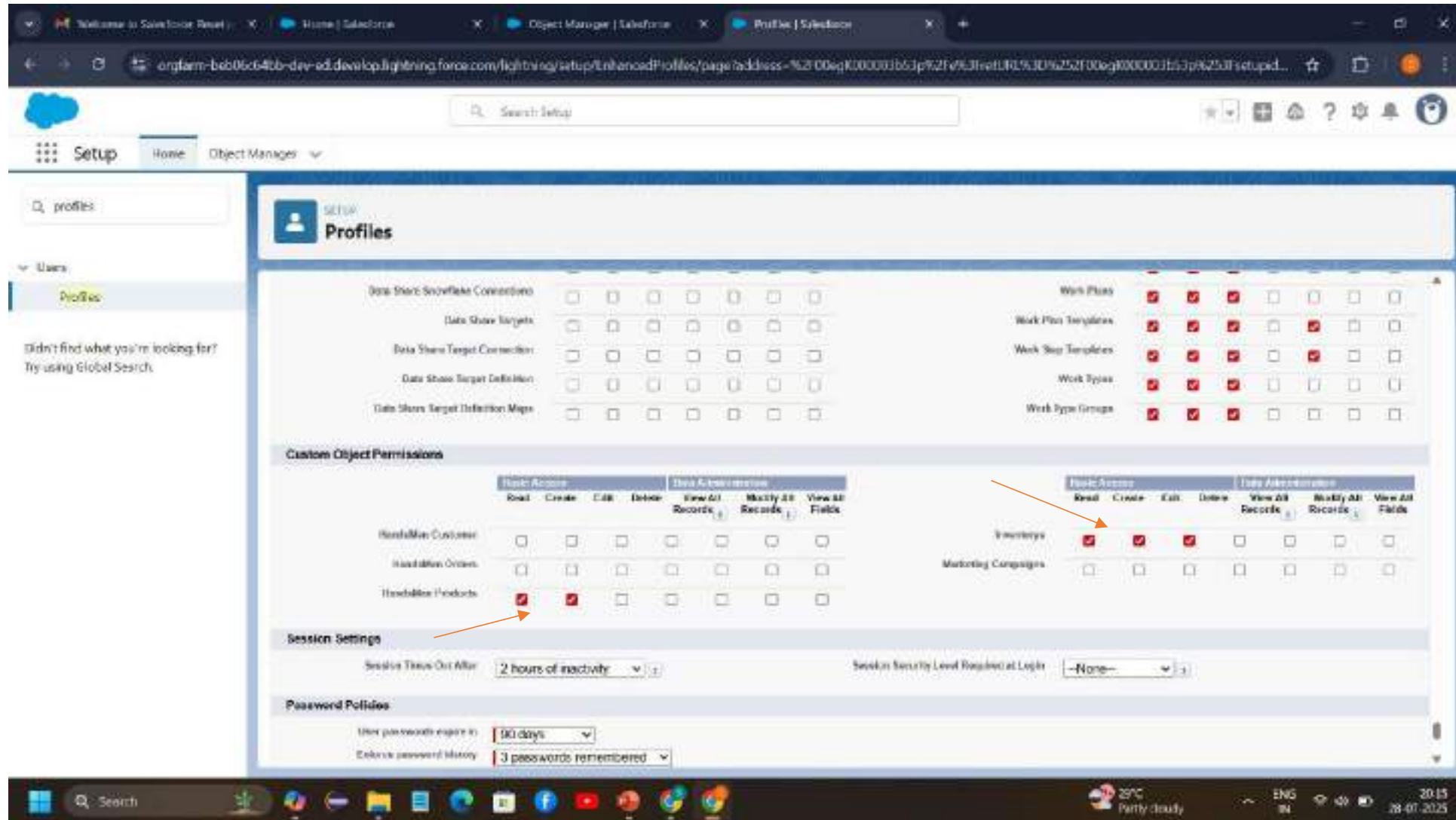
Creating Profile

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



While still on the profile page, then click Edit.

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



Data Security - Roles

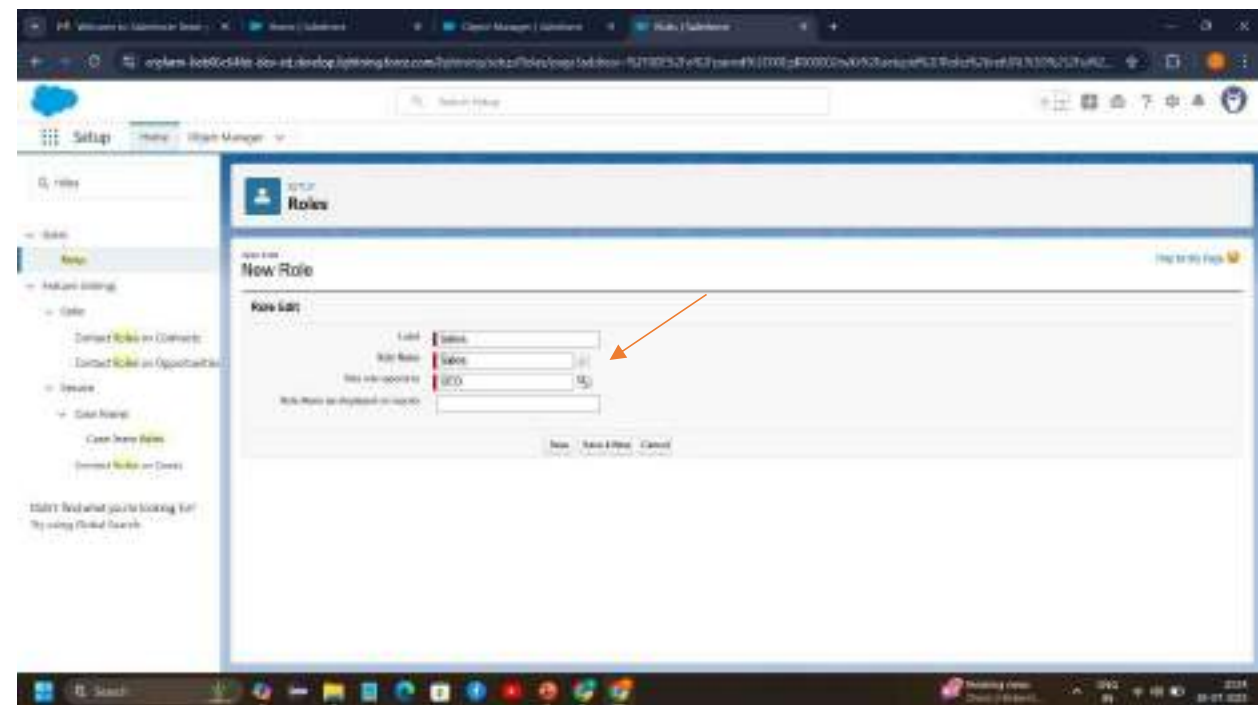
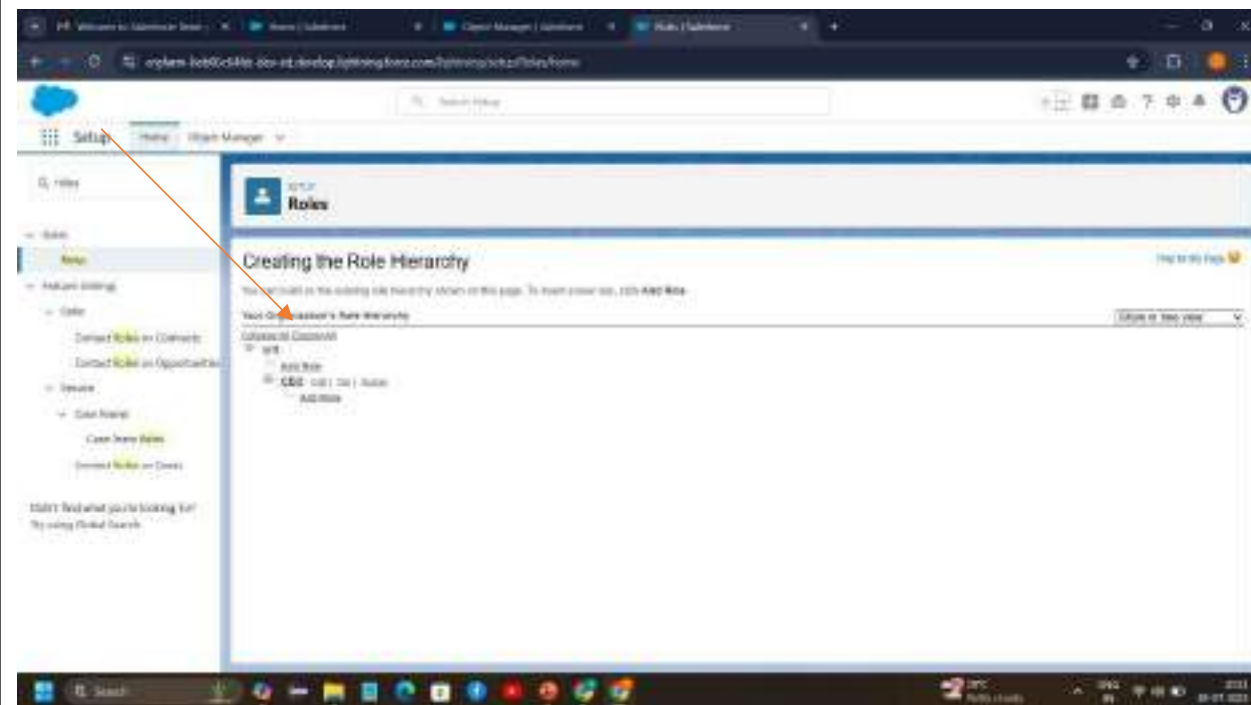
Role - Sales

Creating Sales Manager Role:

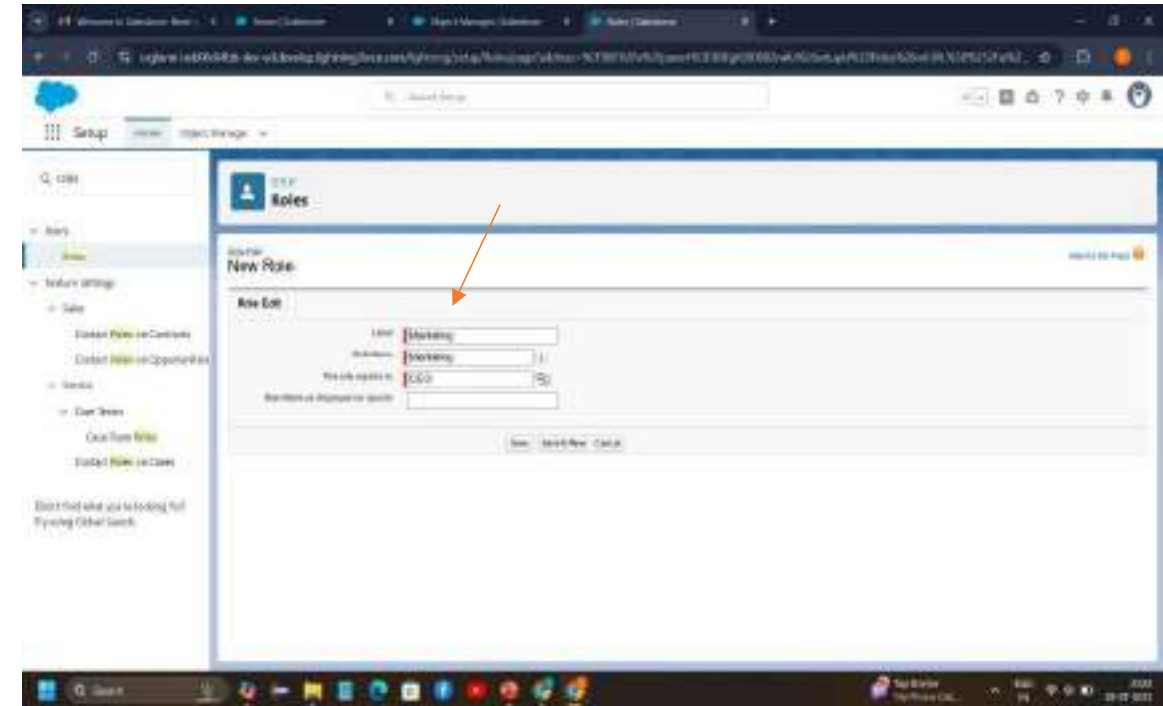
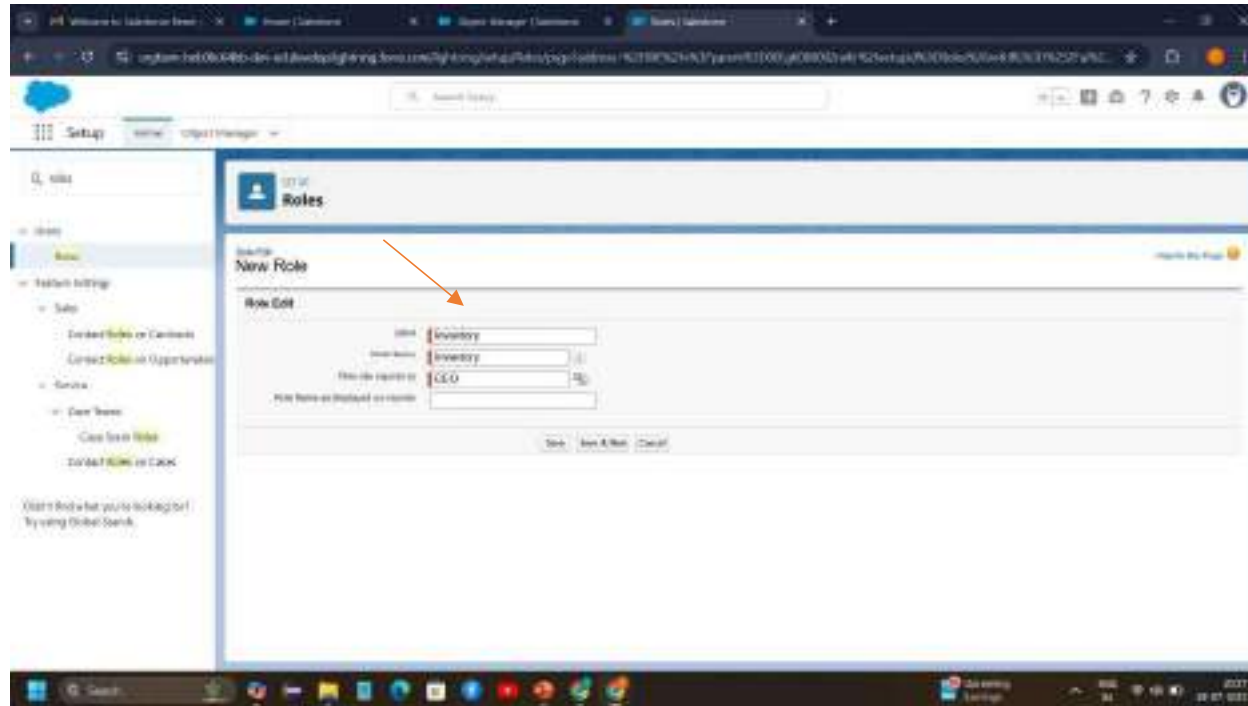
Go to quick find → Search for Roles → click on set up roles.

The screenshot displays the Salesforce Setup interface for the 'Roles' section. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Understanding Roles' and provides instructions on setting up a role hierarchy. A diagram illustrates a hierarchy starting with 'Executive Staff' (CEO, President, CFO, VP Sales) at the top, branching into 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each director role has associated sales rep roles (e.g., Western Sales Rep, Eastern Sales Rep, International Sales Rep). A red arrow points to the 'Set Up Roles' button at the bottom right of the page. The browser address bar shows the URL: `orgname-b606c4bb-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home`. The Windows taskbar at the bottom shows the date as 28-07-2025 and the time as 20:20.

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.

Roles

Your Organization's Role Hierarchy

Collapse All Expand All

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

Data Security - Users

User - Niklaus

Create User

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

Fill in the fields

First Name : Niklaus

Last Name : Mikaelson

Alias : Give an Alias Name

Email id : Give your Personal Email id

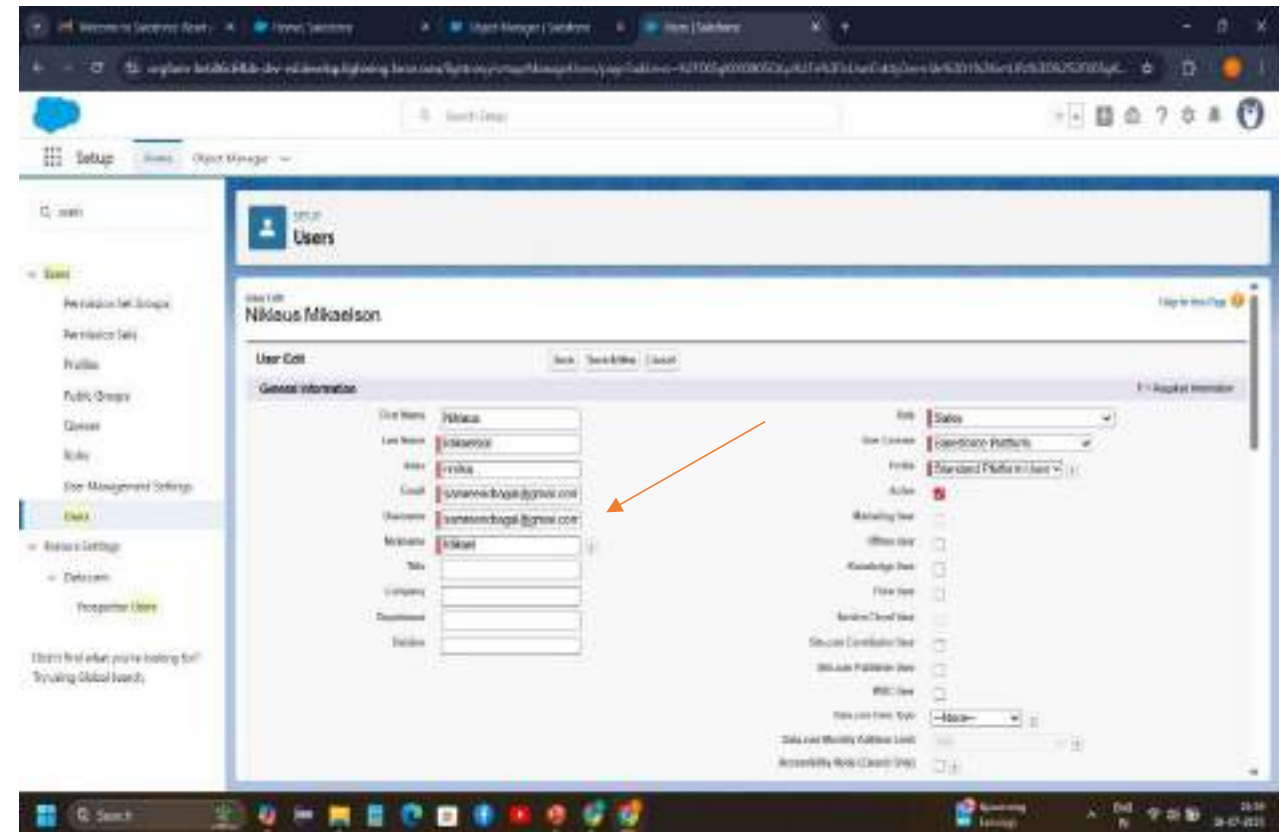
Username : Username should be in this form: text@text.text

Nick Name : Give a Nickname

Role : Sales

User license : Salesforce Platform

Profiles : Platform 1



User - Kol

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

Fill in the fields

First Name : Kol

Last Name : Mikaelson

Alias : Give a Alias Name

Email id : Give your Personal Email id

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

Nick Name : Give a Nickname

Role : Inventory

User license : Salesforce Platform

Profiles : Platform 1

Save.

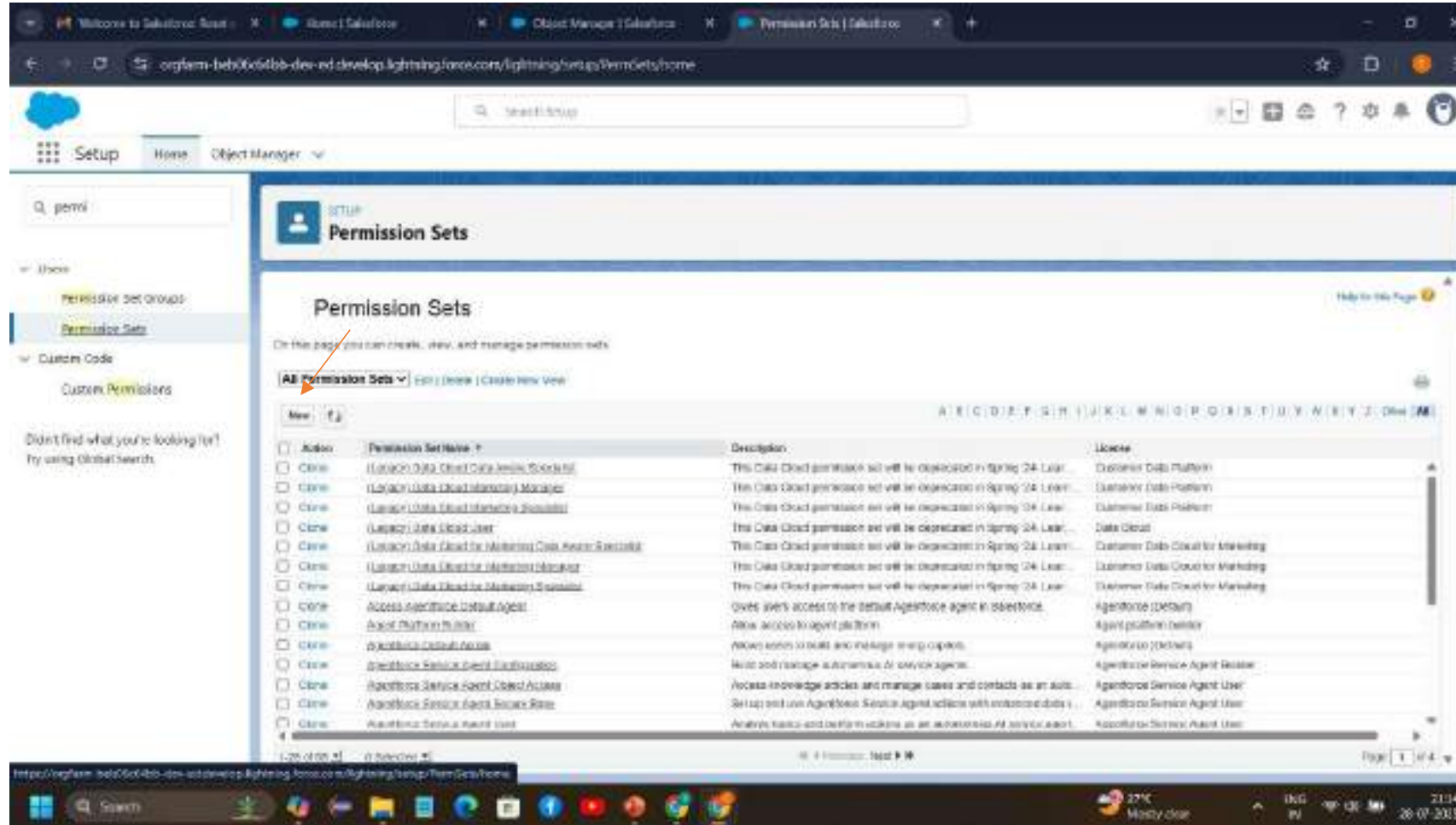
The screenshot shows the Salesforce 'New User' setup page. The 'User Edit' form is displayed with the following fields and values:

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

An orange arrow points to the 'Email' field.

Permission set - Permission_Platform_1

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

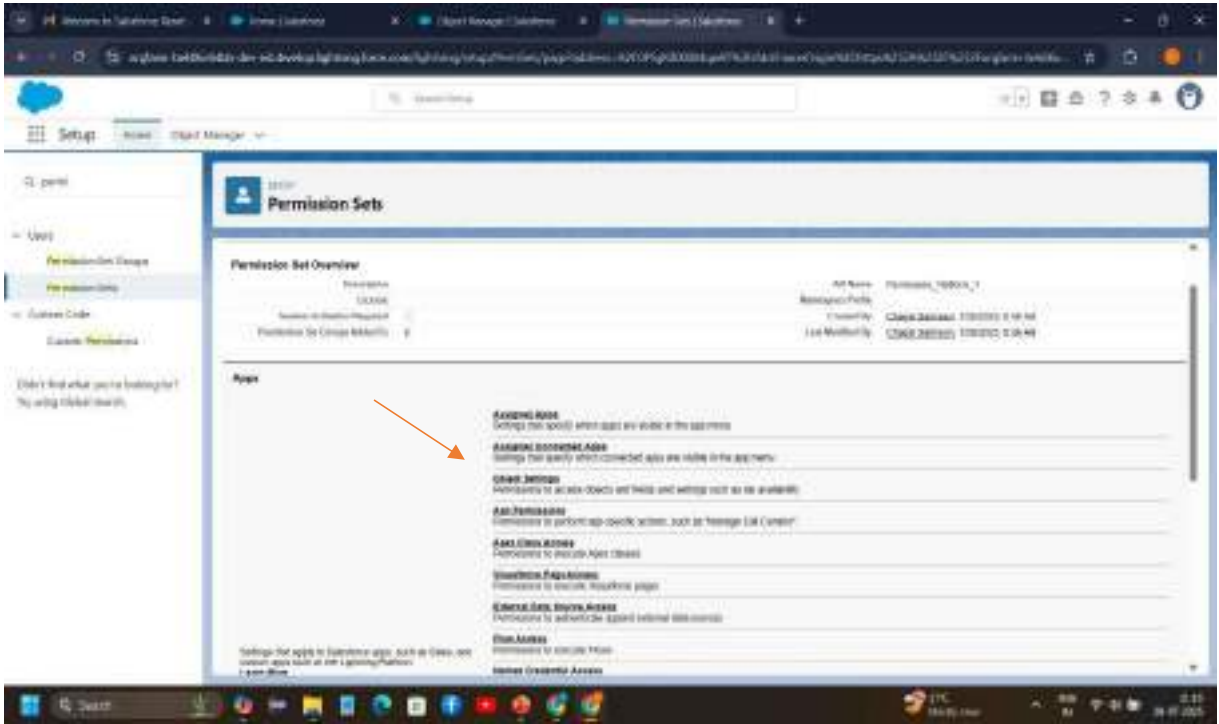
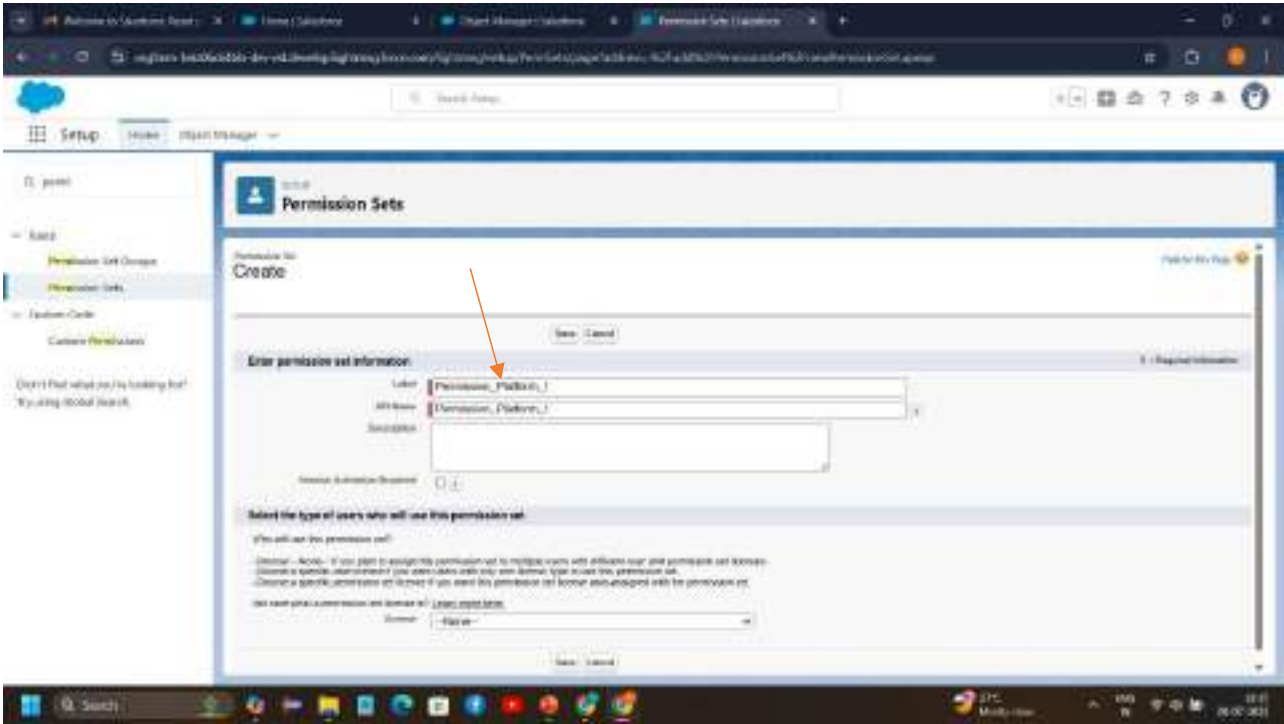


The screenshot displays the Salesforce Setup interface for Permission Sets. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Permission Sets' and includes a search bar and a list of permission sets. A red arrow points to the 'New' button in the top left corner of the list.

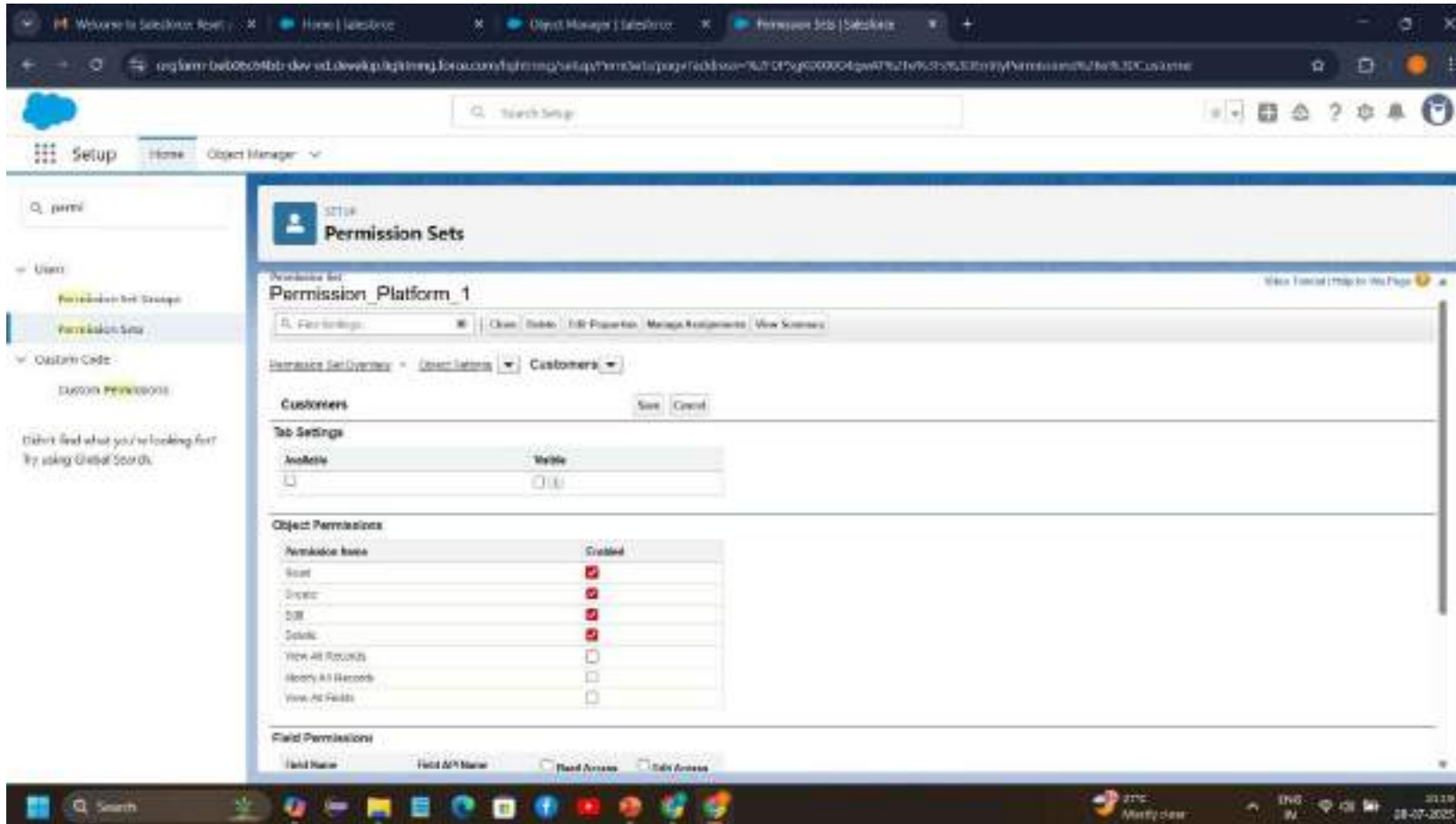
Name	Description	License
Customer Data Cloud Identity Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Customer Data Platform
Customer Data Cloud Identity Provider	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Customer Data Platform
Customer Data Cloud User	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Data Cloud
Customer Data Cloud for Marketing Data Access Read-Only	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Customer Data Cloud for Marketing
Customer Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Customer Data Cloud for Marketing
Customer Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Customer Data Cloud for Marketing
Access to Salesforce Default Agent	Gives users access to the default Agentforce agent in Salesforce.	Agentforce (Default)
Agent Platform Admin	Allows access to agent platform.	Agent platform Admin
Agentforce Platform Admin	Allows access to build and manage in-app copilot.	Agentforce (Default)
Agentforce Service Agent Configuration	Allows users to build and manage in-app copilot.	Agentforce Service Agent Admin
Agentforce Service Agent Object Admin	Allows knowledge articles and manage cases and contacts as an admin.	Agentforce Service Agent User
Agentforce Service Agent Record Admin	Set up and use Agentforce Service Agent actions with external data.	Agentforce Service Agent User
Agentforce Service Agent User	Analyze metrics and define actions as an administrator.	Agentforce Service Agent User

Enter the label name as “Permission_Platform_1” → save.

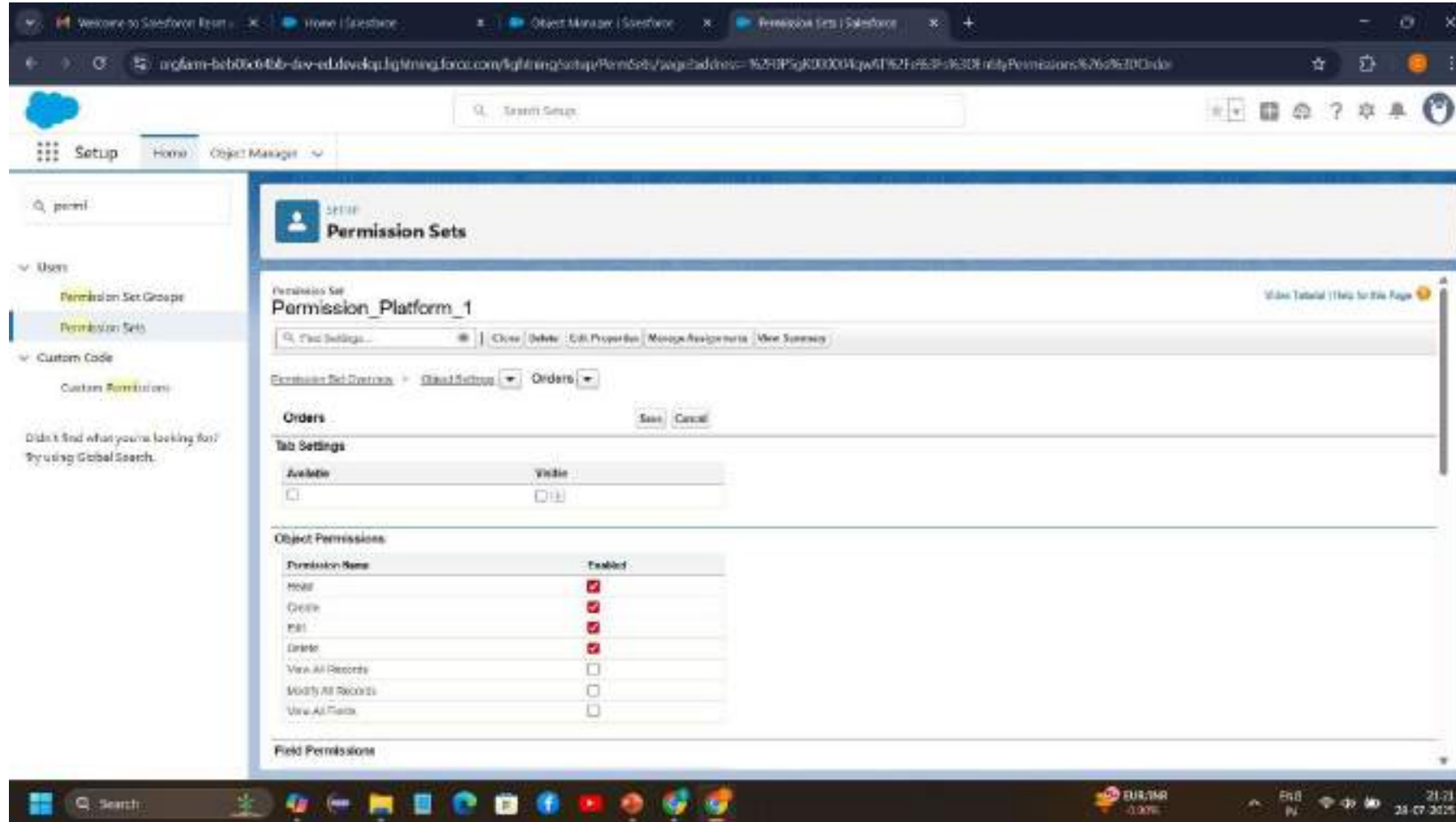
Under Apps Select object settings.



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



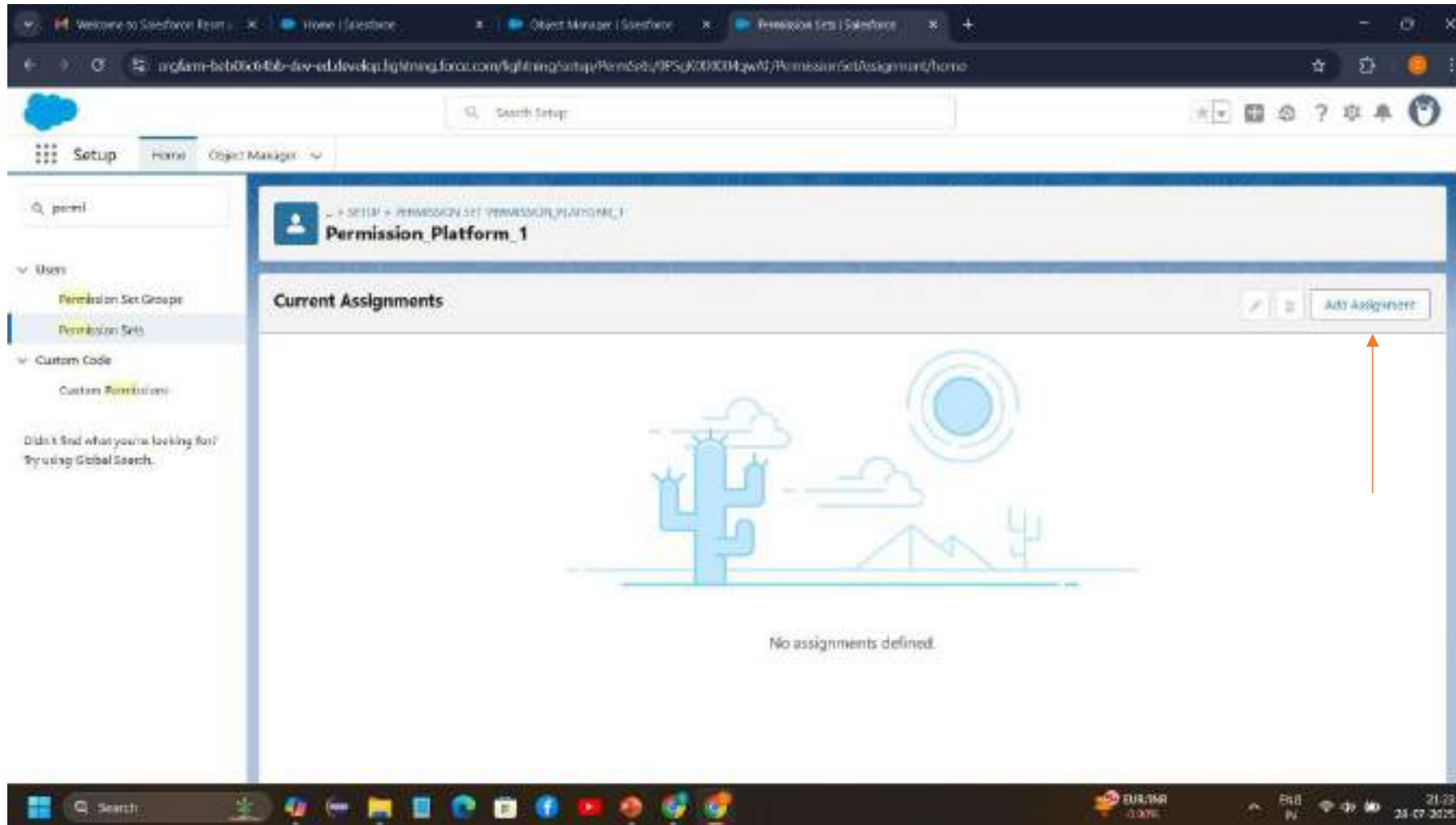
Repeat from step 3 and give permission for read, create, edit and delete on order object



The screenshot shows the Salesforce Setup interface for a Permission Set named 'Permission_Platform_1'. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', and 'Custom Code'. The main content area displays the 'Permission Set Overview' for 'Permission_Platform_1', with tabs for 'Object Settings' and 'Orders'. The 'Object Permissions' section shows a table of permissions for the 'Orders' object.

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

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



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

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

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

Buttons: Cancel, Next

Email Template

Create an Order Confirmation Email Template

Steps to Create a Classic Email Template

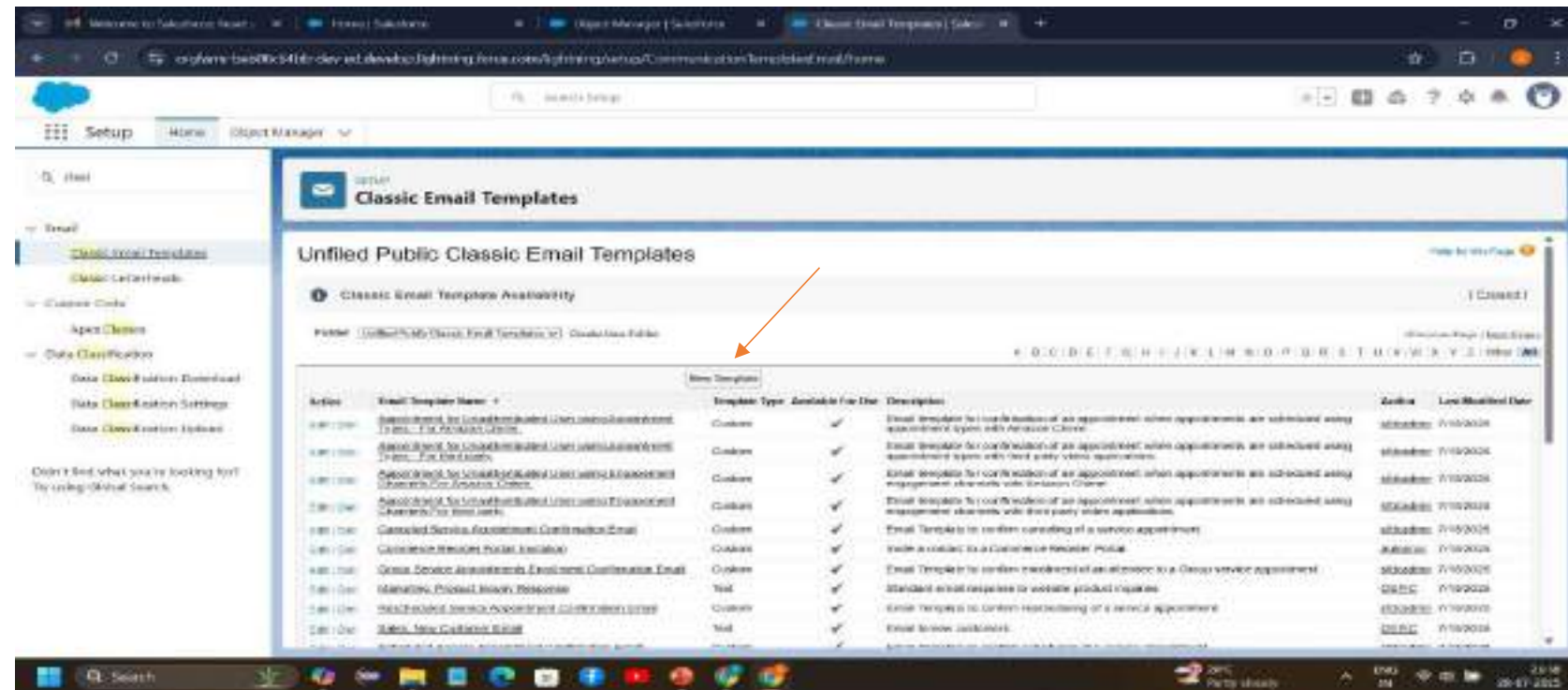
Go to Salesforce Setup

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

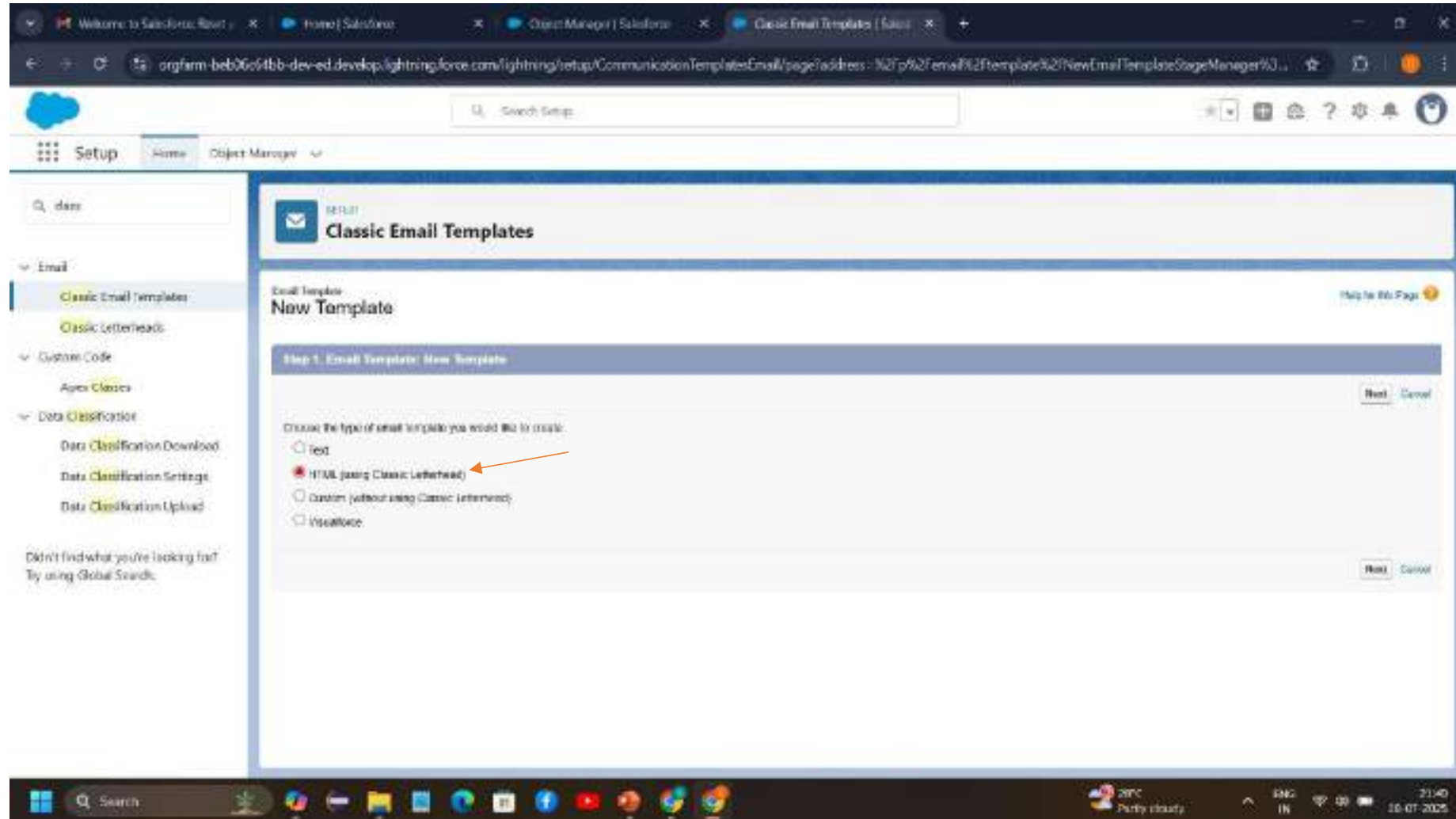
Navigate to Classic Email Templates

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

Click "New Template"



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



Fill in Template Details

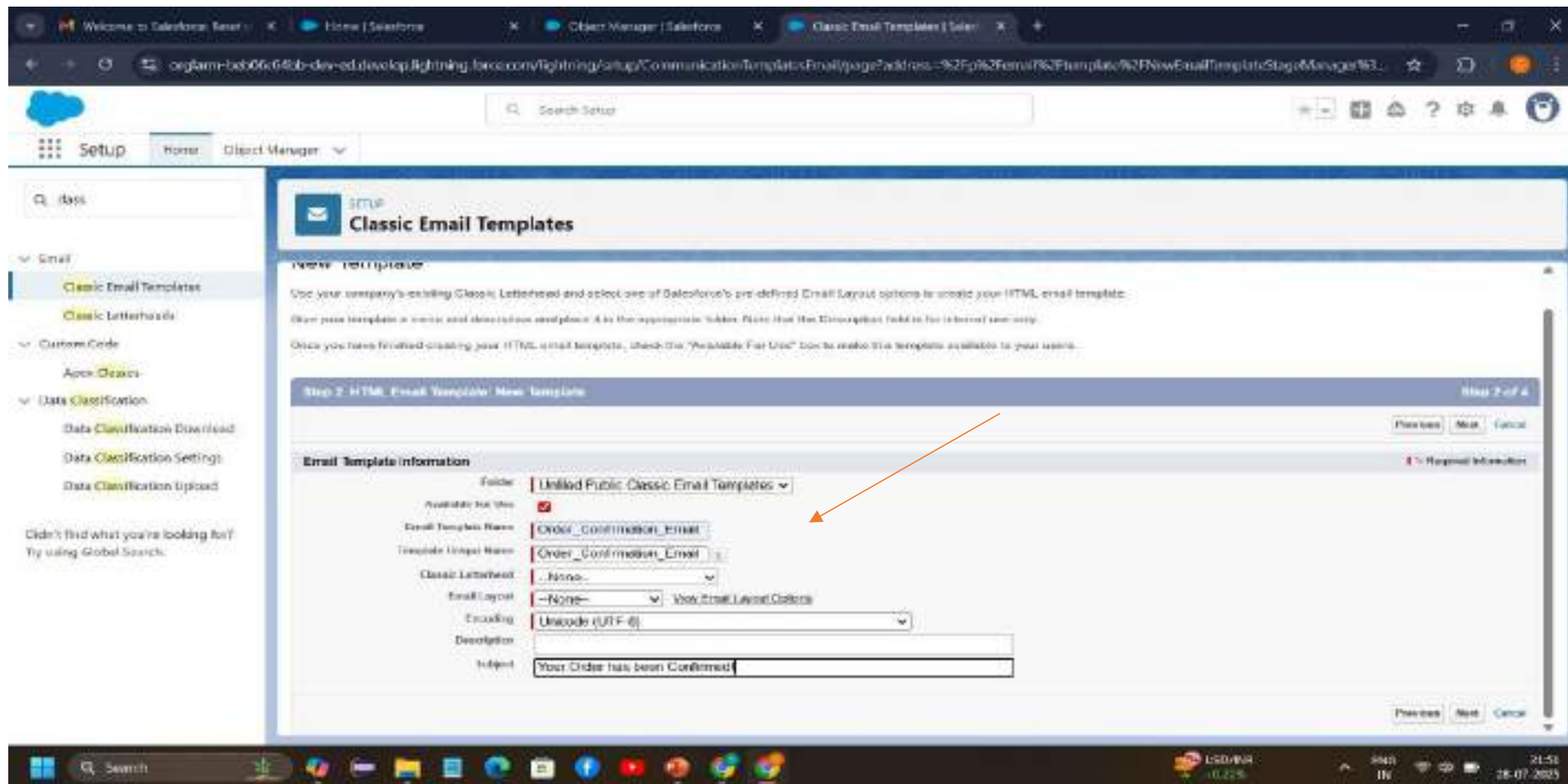
Folder: Select "Unfiled Public Email Templates" (or create a new folder).

Available for Use: ☒ (Check this box)

Email Template Name: Order_Confirmation_Email (or appropriate name).

Encoding: UTF-8 (default).

Subject: Your Order has been Confirmed!!



HTML Body:

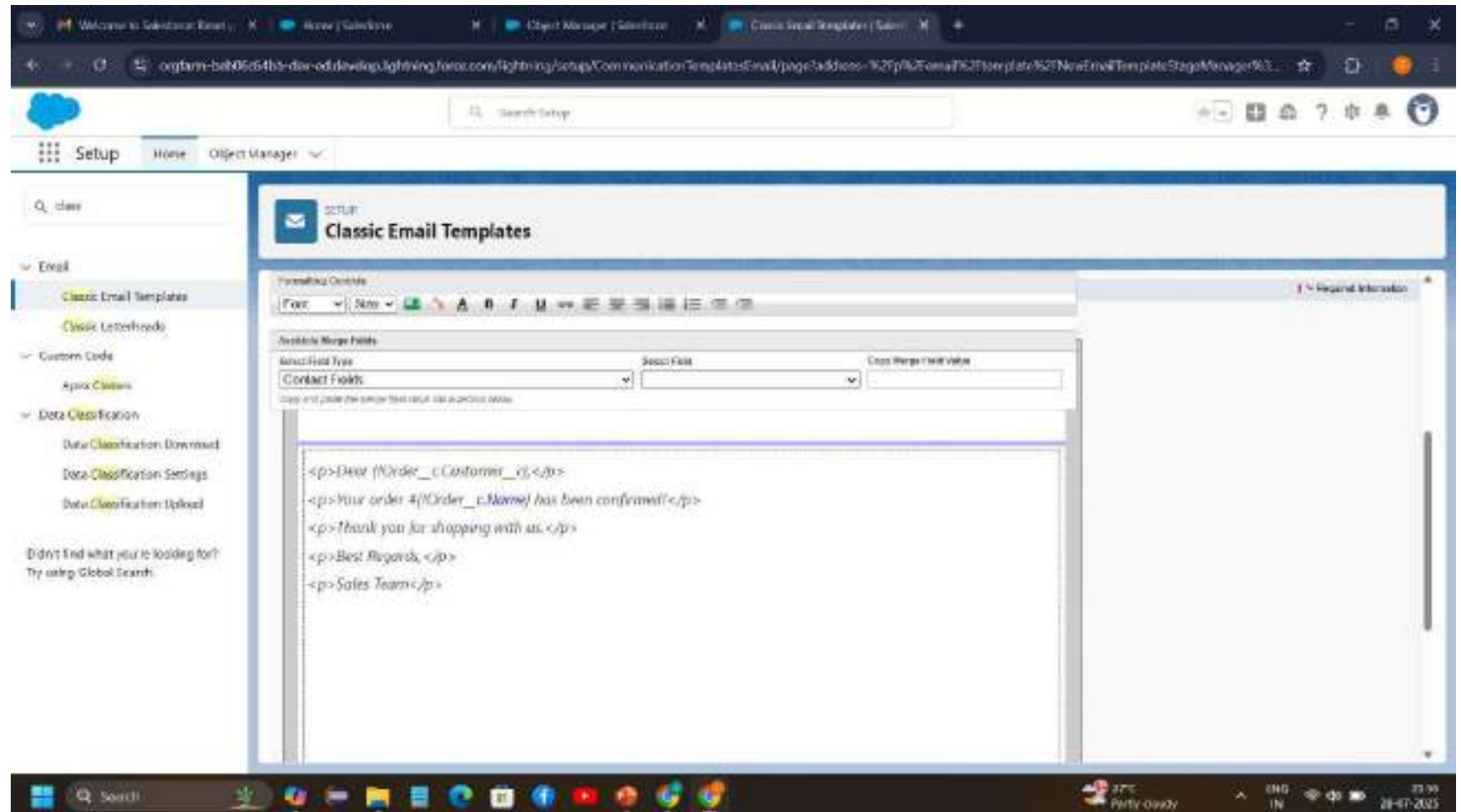
`<p>Dear {!Order__c.Customer__c},</p>`

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

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

`<p>Best Regards,</p>`

`<p>Sales Team</p>`



Save the Template.

The screenshot shows the Salesforce Classic Email Template editor. The browser address bar displays 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 and 'Classic Email Templates' selected. 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-formatted text:

```
<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.

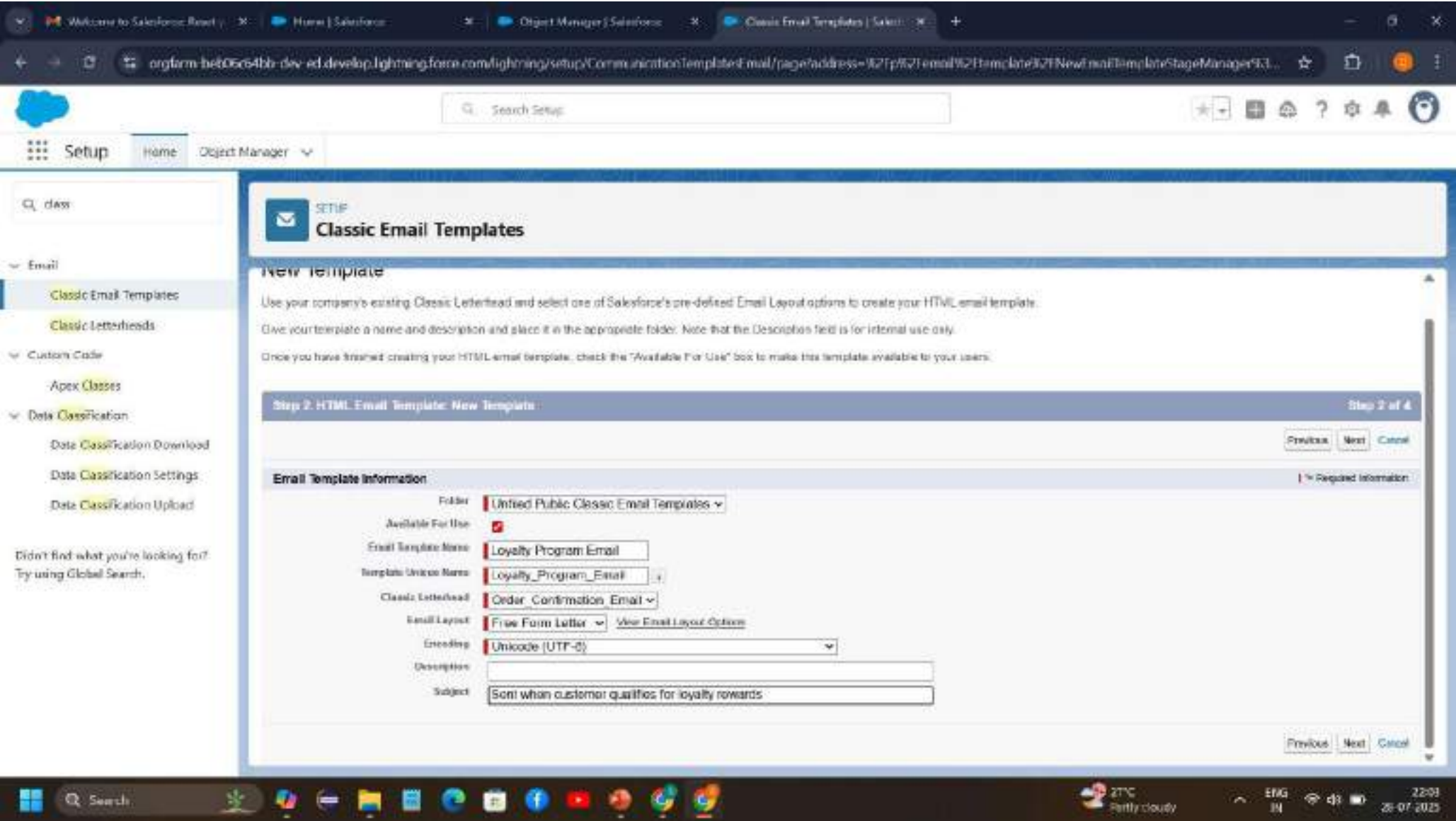
Create Remaining Email Template with the name "Low Stock Alert"

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=%2Fp%2Femail%2Ftemplate%2FNewEmailTemplateStageManager%2F...`. The page title is "Classic Email Templates". The left sidebar shows the navigation menu with "Email" expanded and "Classic Email Templates" selected. The main content area is titled "Classic Email Templates" and 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 bottom right of the form.

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



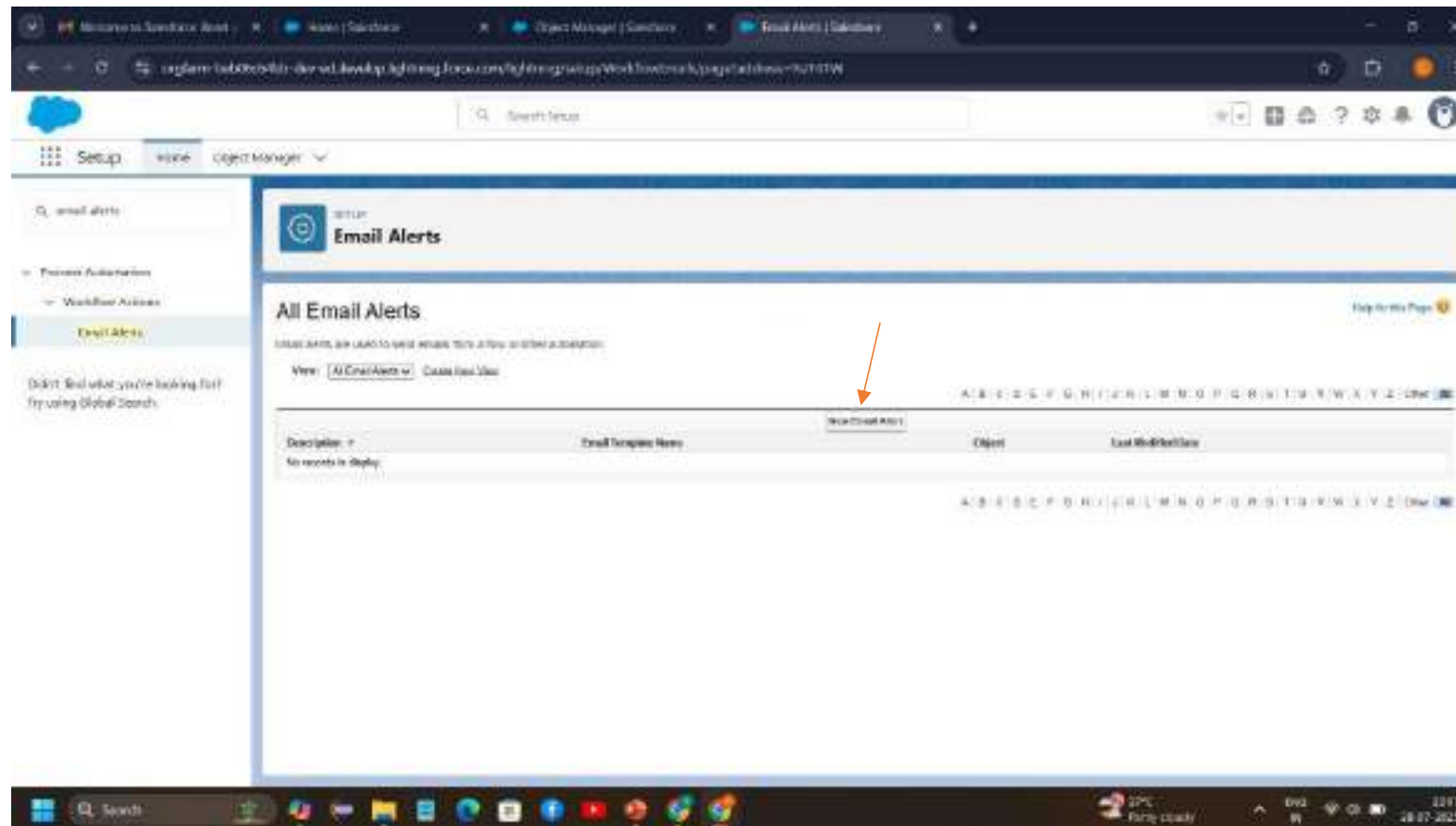
Create an Email Alert

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.

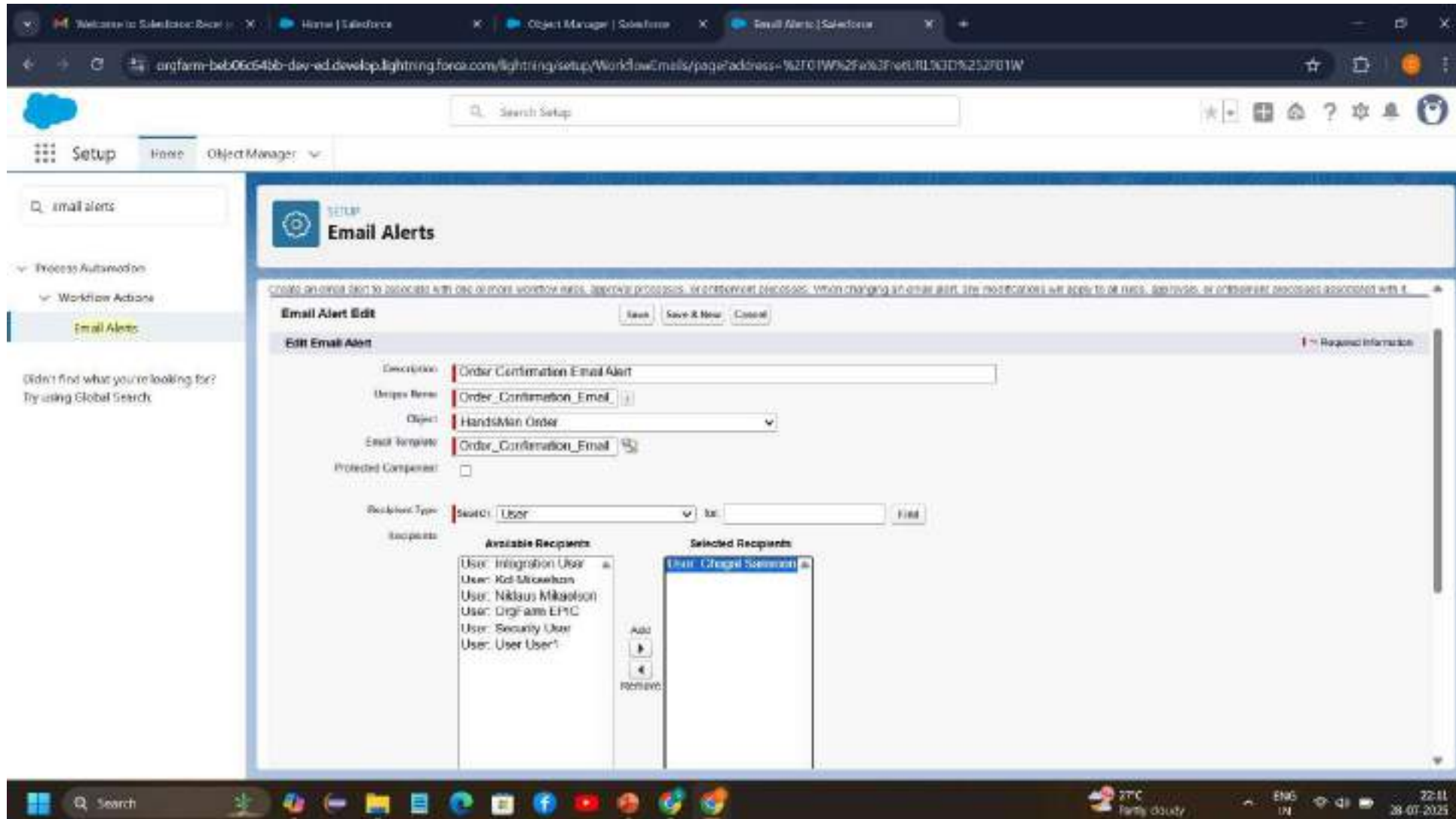


Description: Order Confirmation Email Alert

Object: Order__c

Email Template: Select the one created earlier.

Save the email alert.



Flows

Create Order Confirmation Email

Order Confirmation Email (Record-Triggered)

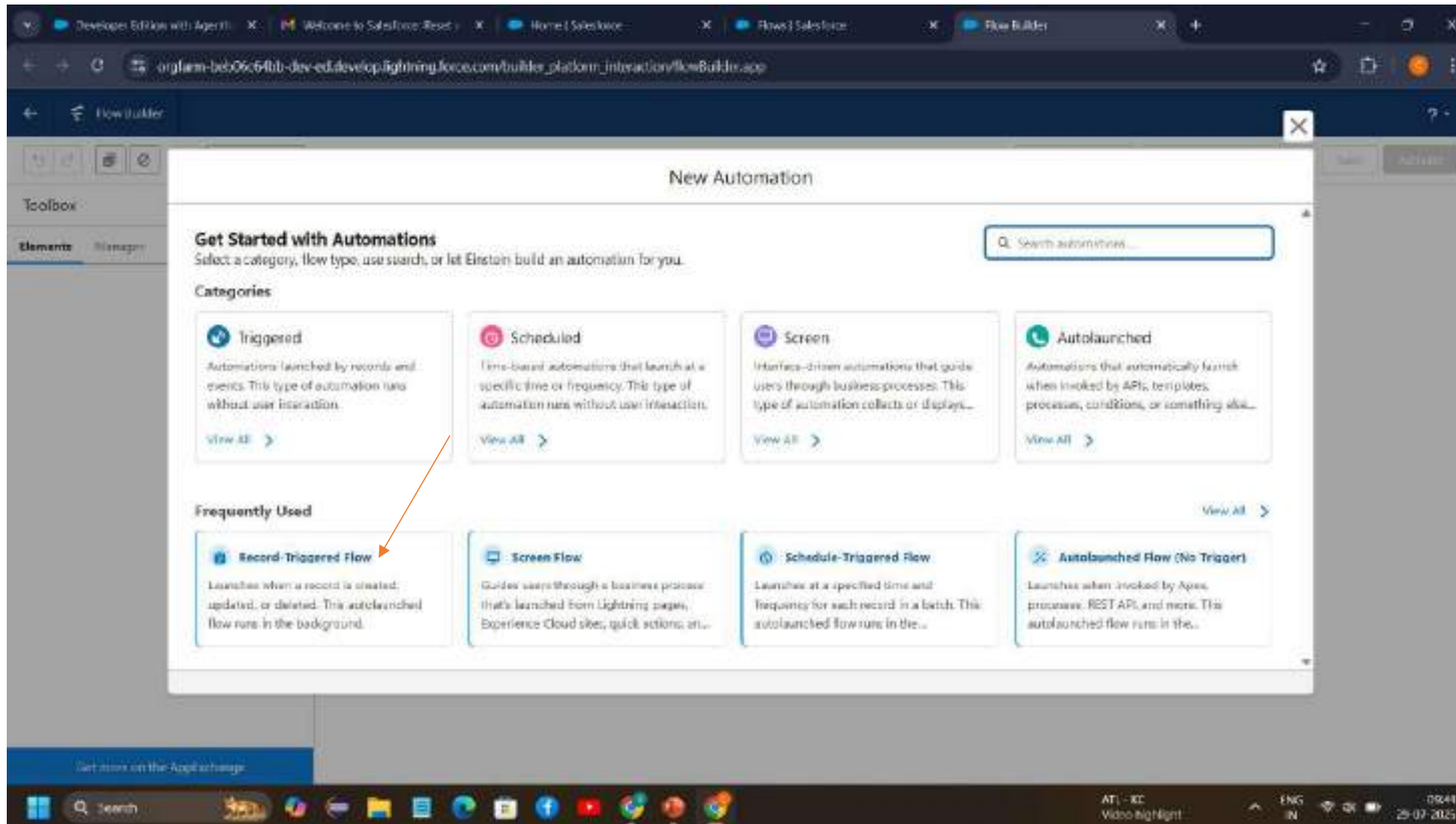
Go to Setup → Flow

In Quick Find, search for Flows and click on it

The screenshot shows the Salesforce Setup interface. In the left sidebar, 'Setup' is selected, and 'Flows' is highlighted under the 'Process Automation' section. The main content area displays a list of flow definitions. The list has columns for Flow Label, Process Type, Active, Template, Package State, and Last Modified. The flows listed include 'Add or Modify Service Appointment Attendance', 'Approvals Workflow: Evaluate Approval Requests', 'Approvals Workflow: Process Approval Submission', 'Authentication Provider User Registration', 'Basic Approval Request', 'Book Appointment from Invitation', 'Cancel Item Flow', 'Change Case Owner to Incident Owner', 'Chat Bot to Agent and Queue', 'Chat Bot to Agent with the Right Skills', 'Check Flow API Name', and 'Check Service Flow Eligibility'.

Flow Label	Process Type	Active	Template	Package State	Last Modified
Add or Modify Service Appointment Attendance	JavaScript Scheduler Flow	✓	✓	Managed-Installed	
Approvals Workflow: Evaluate Approval Requests	Screen Flow	✓	✓	Managed-Installed	
Approvals Workflow: Process Approval Submission	Screen Flow	✓	✓	Managed-Installed	
Authentication Provider User Registration	Identity User Registration Flow	✓	✓	Managed-Installed	
Basic Approval Request	Flow Orchestration for LWS	✓	✓	Managed-Installed	
Book Appointment from Invitation	Salesforce Scheduler Flow	✓	✓	Managed-Installed	
Cancel Item Flow	Screen Flow	✓	✓	Managed-Installed	
Change Case Owner to Incident Owner	Screen Flow	✓	✓	Managed-Installed	
Chat Bot to Agent and Queue	Omni-Channel Flow	✓	✓	Managed-Installed	
Chat Bot to Agent with the Right Skills	Omni-Channel Flow	✓	✓	Managed-Installed	
Check Flow API Name	Auto-Launched Flow	✓	✓	Managed-Installed	
Check Service Flow Eligibility	Auto-Launched Flow	✓	✓	Managed-Installed	

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 'HandMtn Order' selected. Under 'Configure Trigger', the option 'A record is updated' is selected. Under 'Set Entry Conditions', the 'Condition Requirements' are set to 'All Conditions Are Met (AND)'. A single condition is defined with the field 'Status__c', the operator 'Equals', and the value 'Confirmed'. Two orange arrows point to the 'HandMtn Order' field and the 'Equals' operator.

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

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

Flow Builder

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

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: Equals 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

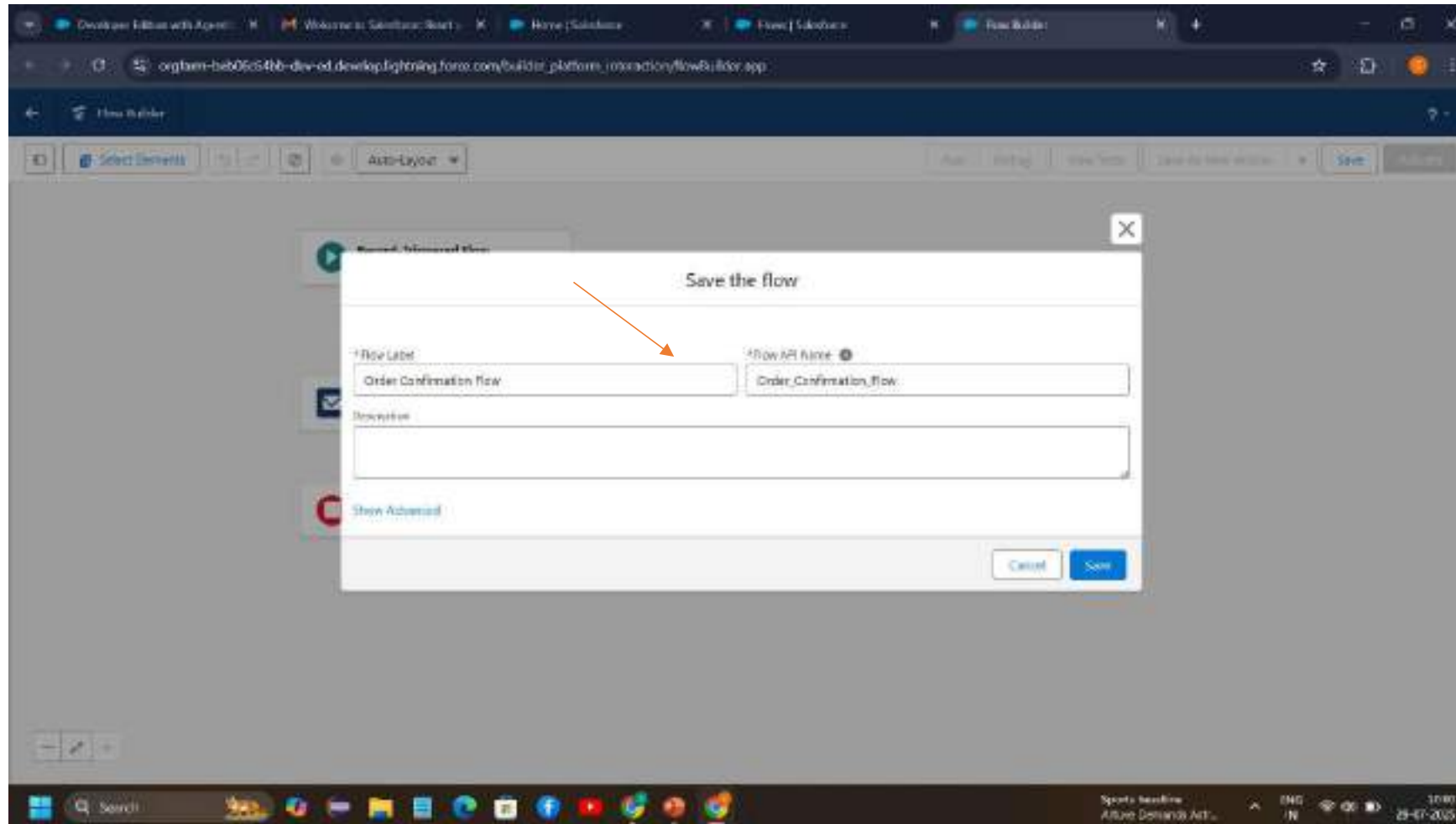
Label : Send Order Confirmation Email

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

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



Create Stock Alert Email (Record-Triggered)

Go to Setup → Flows → New Flow

Select Record-Triggered Flow → Click Create.

Set Flow Trigger Details

Object: Inventory__c

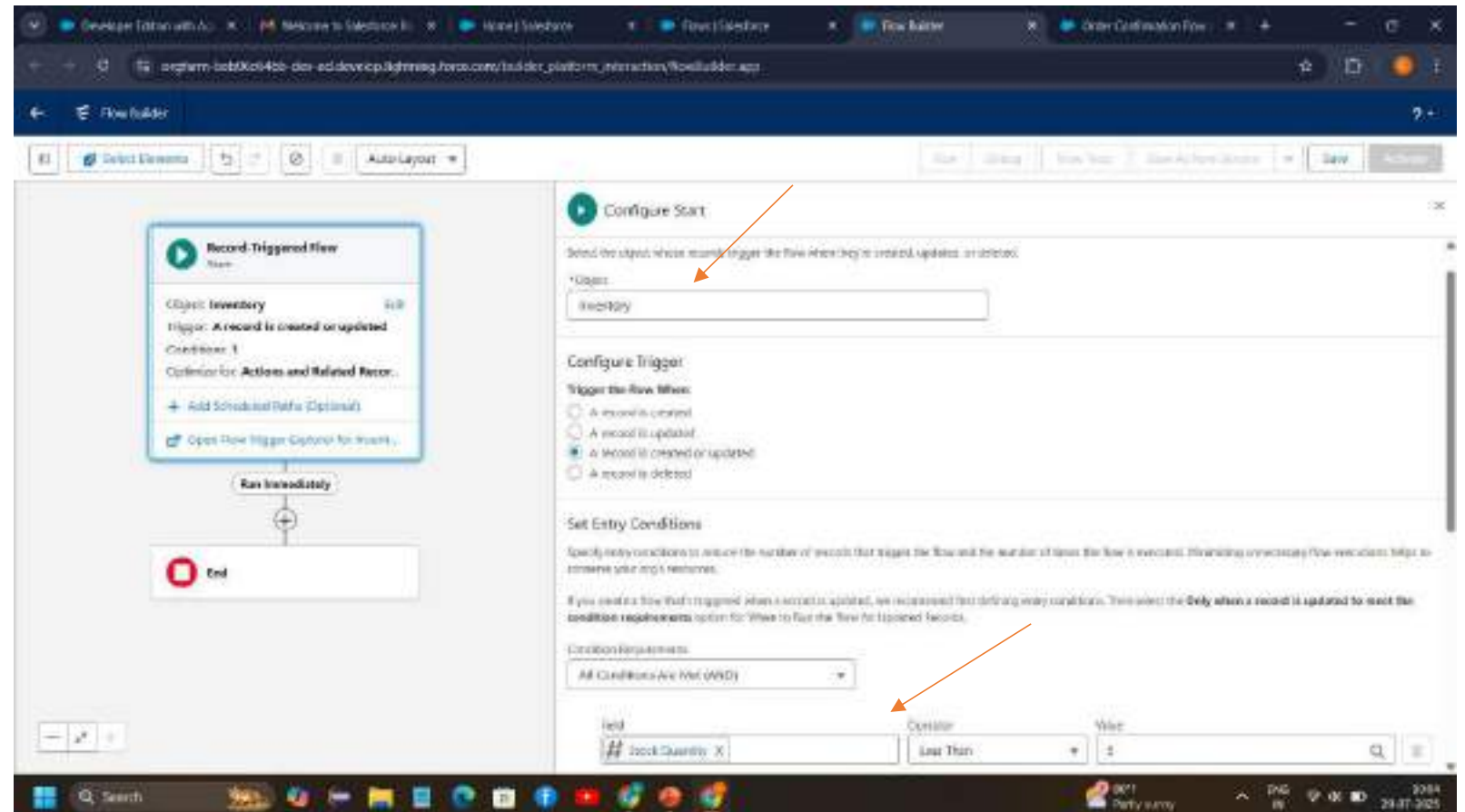
Trigger: When a record is created or updated

Condition:

Field: Stock_Quantity__c < 5

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

Click Done.



Add an "Action" Element

Click the "+" icon → Select Action.

Action Type: Send Email Alert

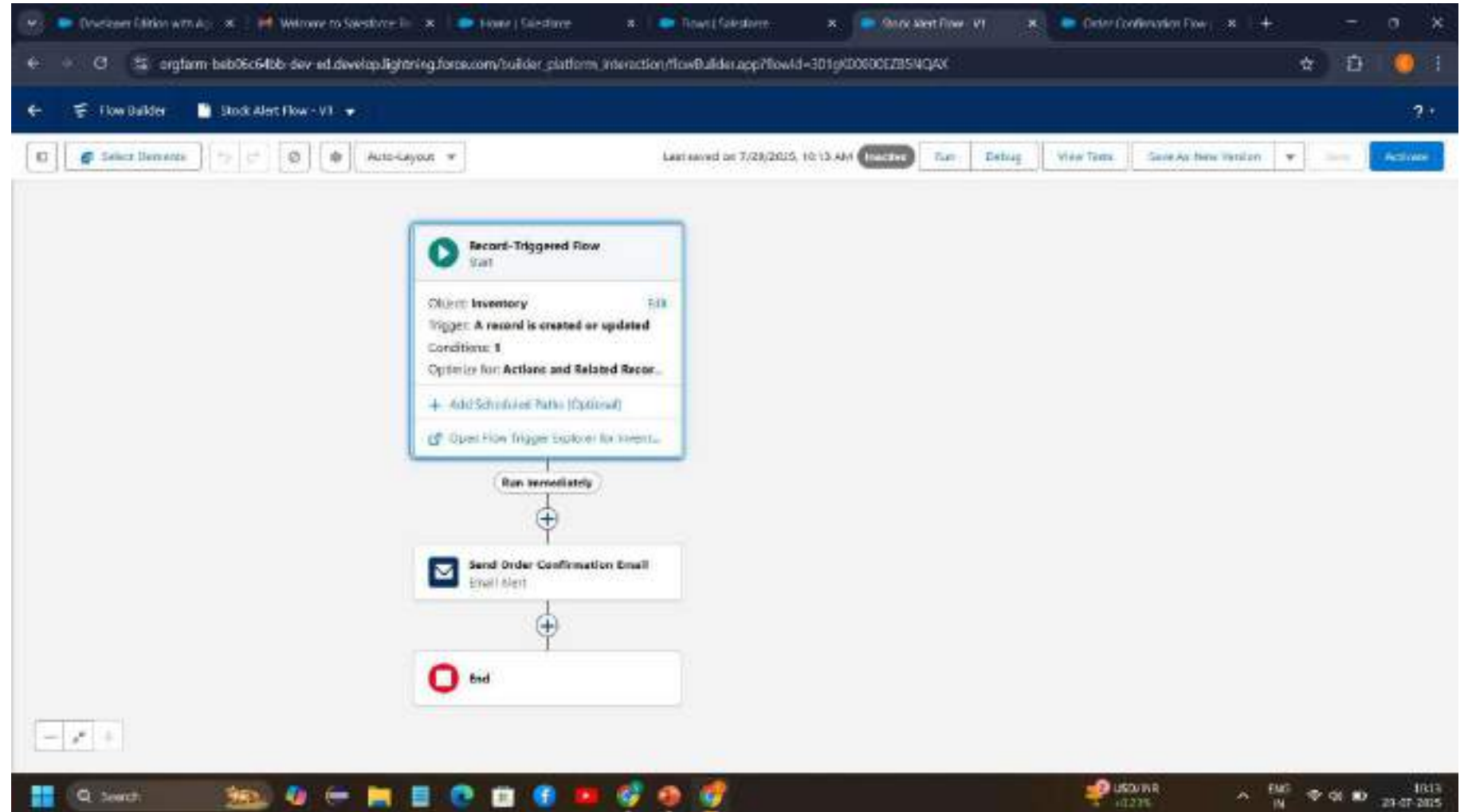
Create a new Email Alert (Similar to the Order Confirmation setup).

Recipient: Inventory Manager.

Save & Activate the Flow

Name: Stock Alert Flow

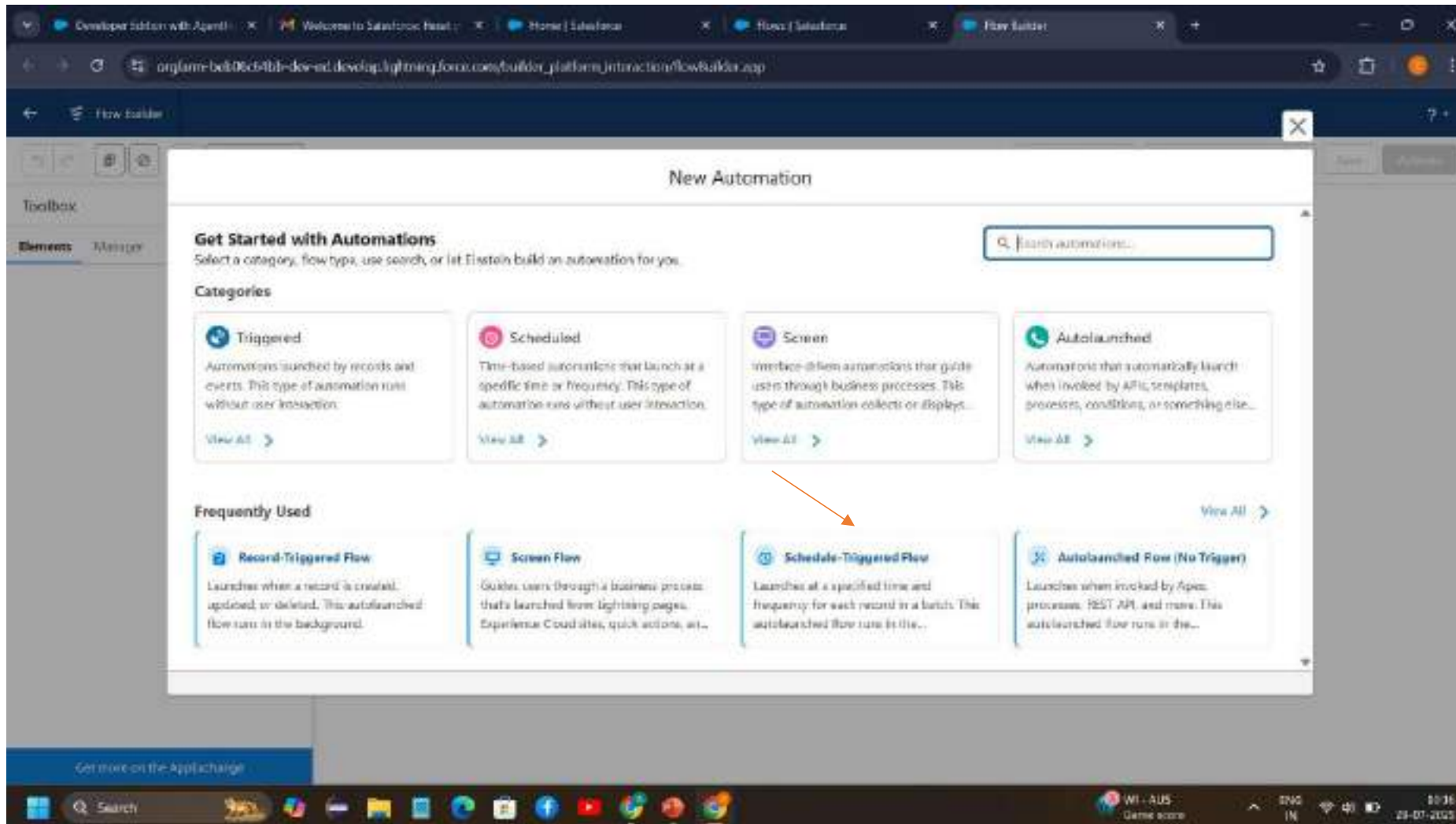
Click Save → Activate.



Create a Scheduled Flow

Go to Setup → Flows → New Flow

Select Schedule-Triggered Flow → Click Create.



Set Schedule Frequency

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

Frequency: Select Daily.

Click Done.

The screenshot displays the Salesforce Flow Builder interface. The main workspace shows a flow diagram with a 'Start' node (a green play button) and an 'End' node (a red stop button). The 'Start' node is configured with the following details:

- Start Date: Tue, Dec 31, 2024, 5:30:00 AM
- Frequency: Daily

The 'Set a Schedule' configuration panel on the right side of the screen is open, showing the following settings:

- Start Date: Dec 31, 2024
- Start Time: 5:30 AM
- Frequency: Daily (selected from a dropdown menu)

An orange arrow points from the 'Frequency' dropdown menu in the 'Set a Schedule' panel to the 'Frequency: Daily' text in the flow diagram's 'Start' node configuration.

Add "Get Records" Element

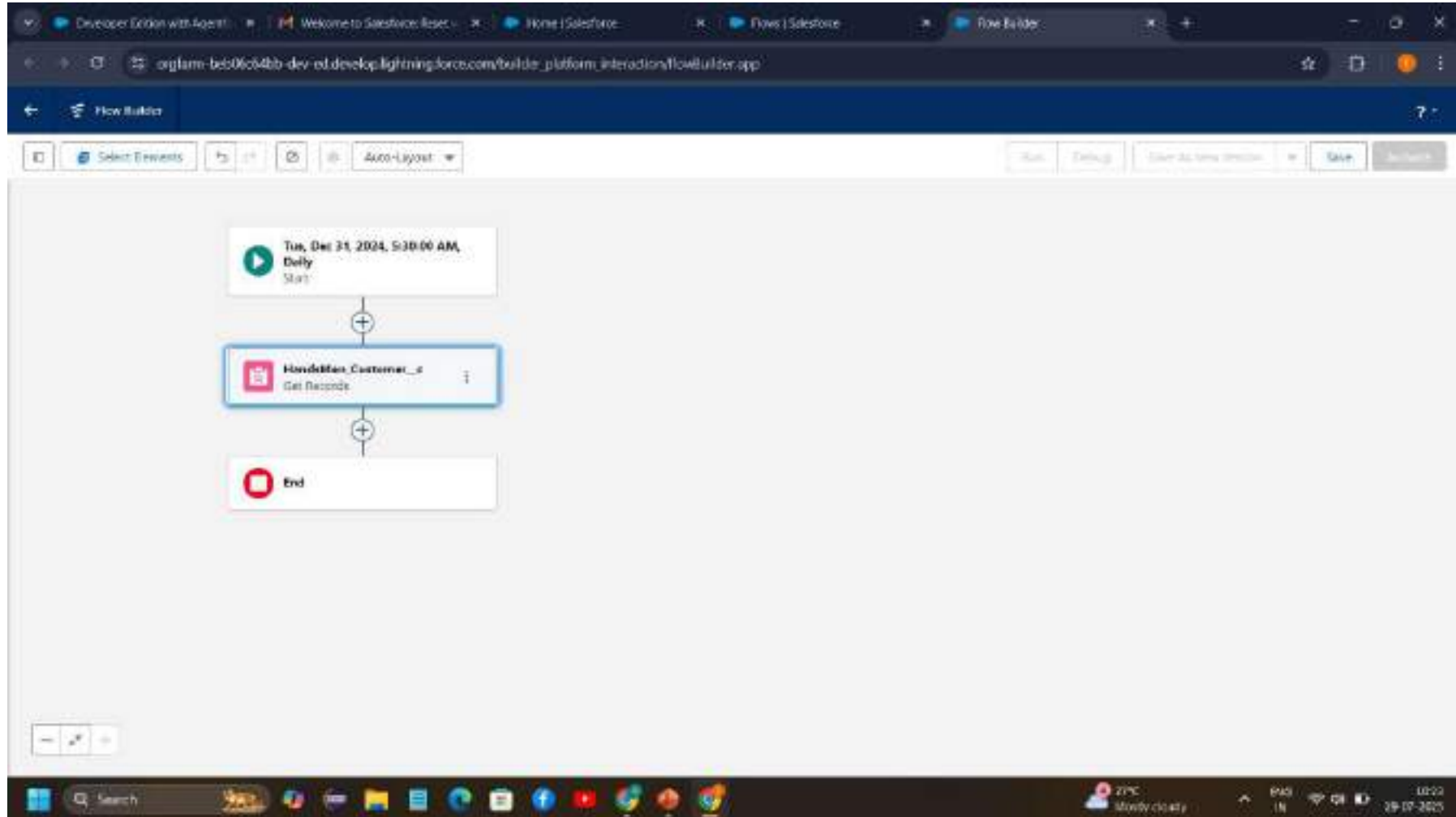
Click the "+" icon → Select Get Records.

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

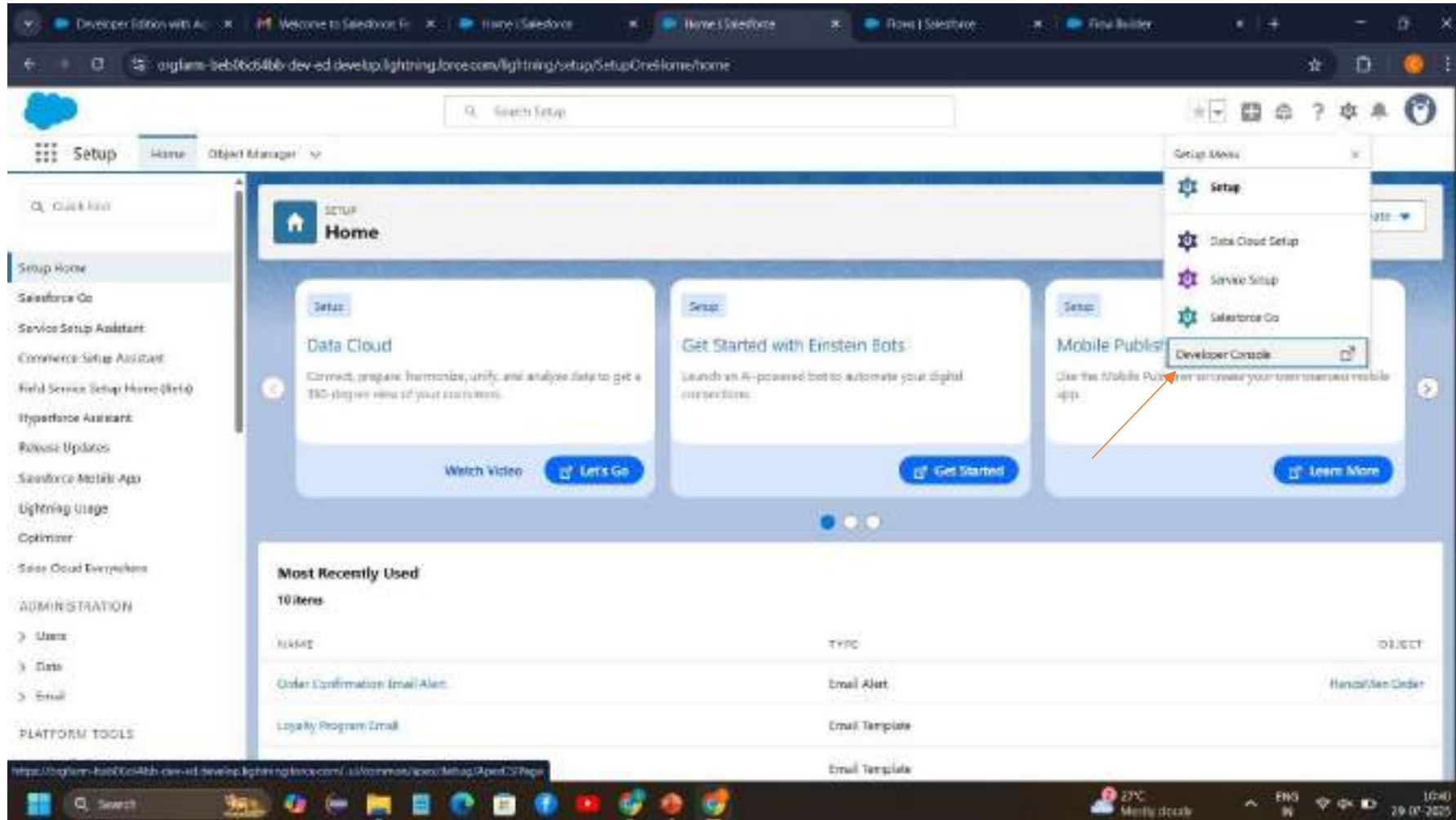
Click Save → Activate.



Automation using Apex

Create Apex Class

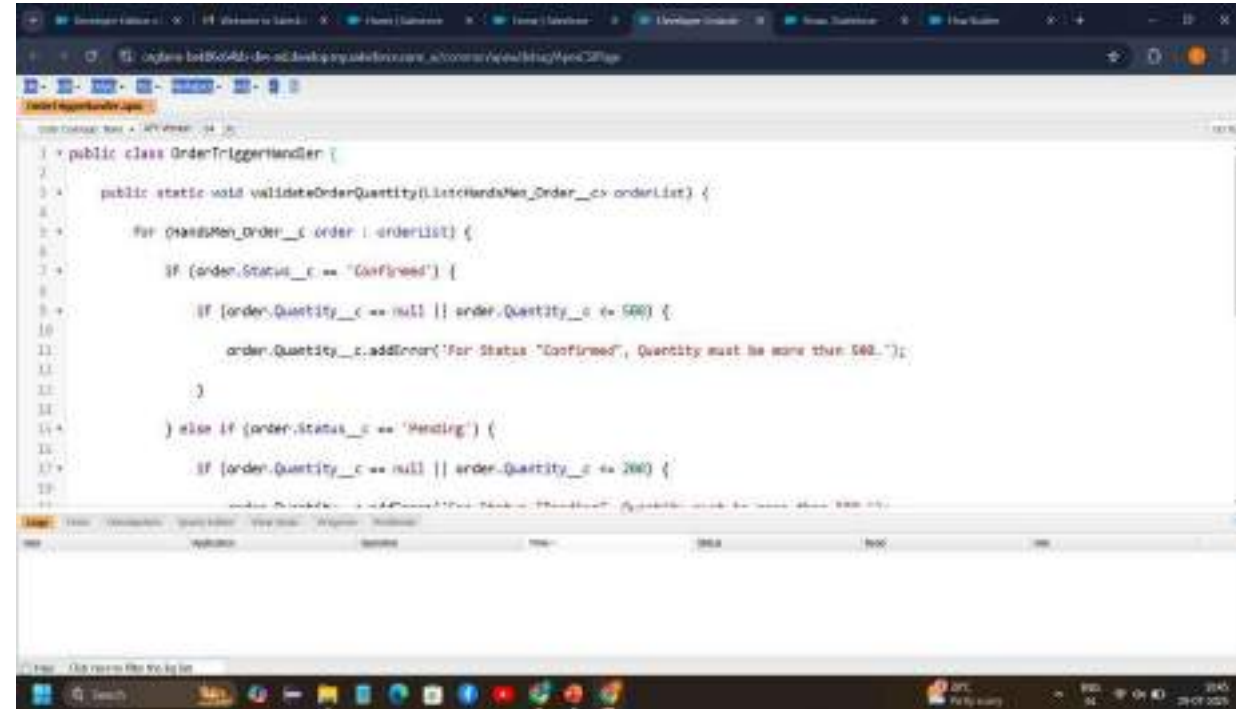
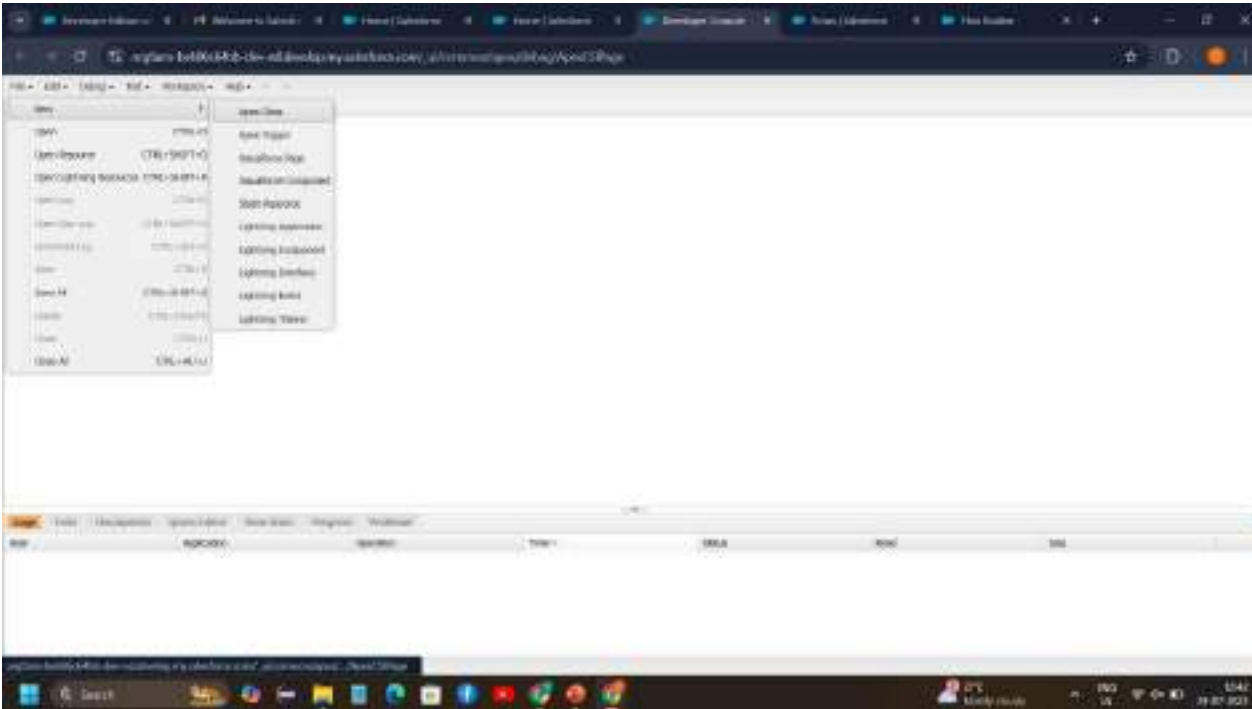
Go to Setup → Click on the gear icon → Select Developer Console.



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.



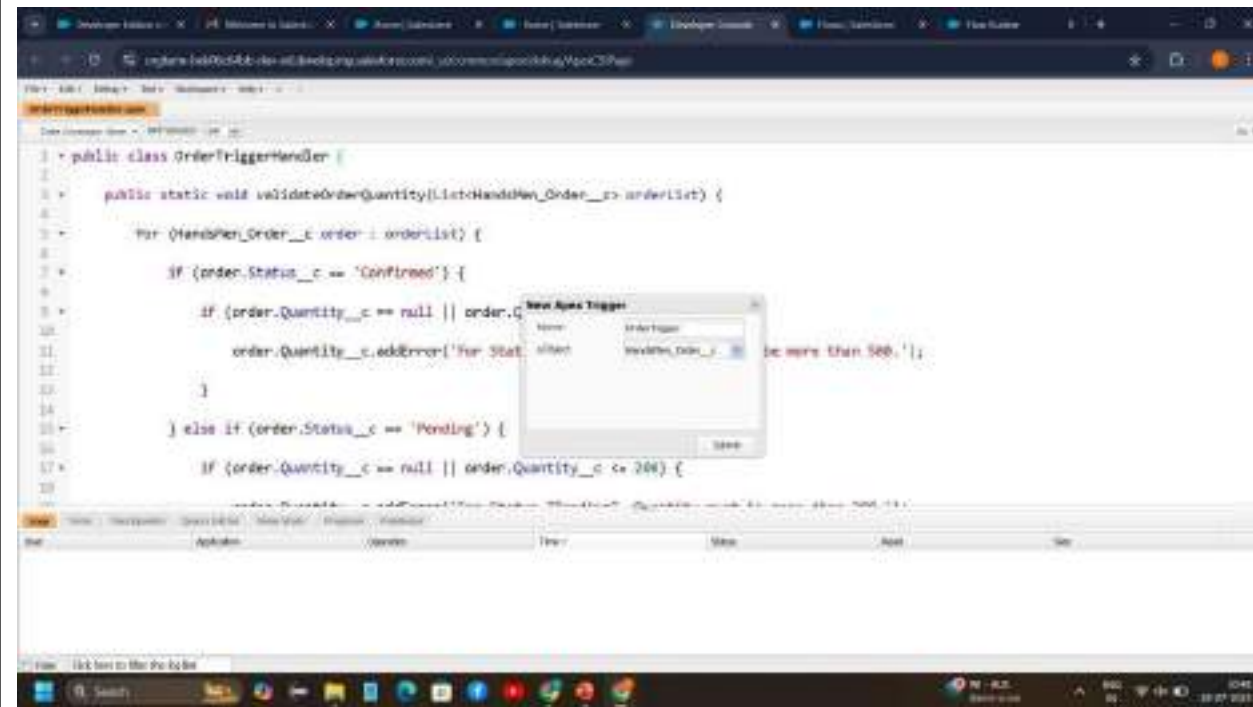
To create a new Apex Trigger follow the below steps:

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



```
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 should be more than 300.');12  
13                 }  
14  
15             } else if (order.Status__c == 'Pending') {  
16  
17                 if (order.Quantity__c == null || order.Quantity__c <= 300) {  
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```

Batch Jobs

Create Batch Apex

Create an Apex Class

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

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

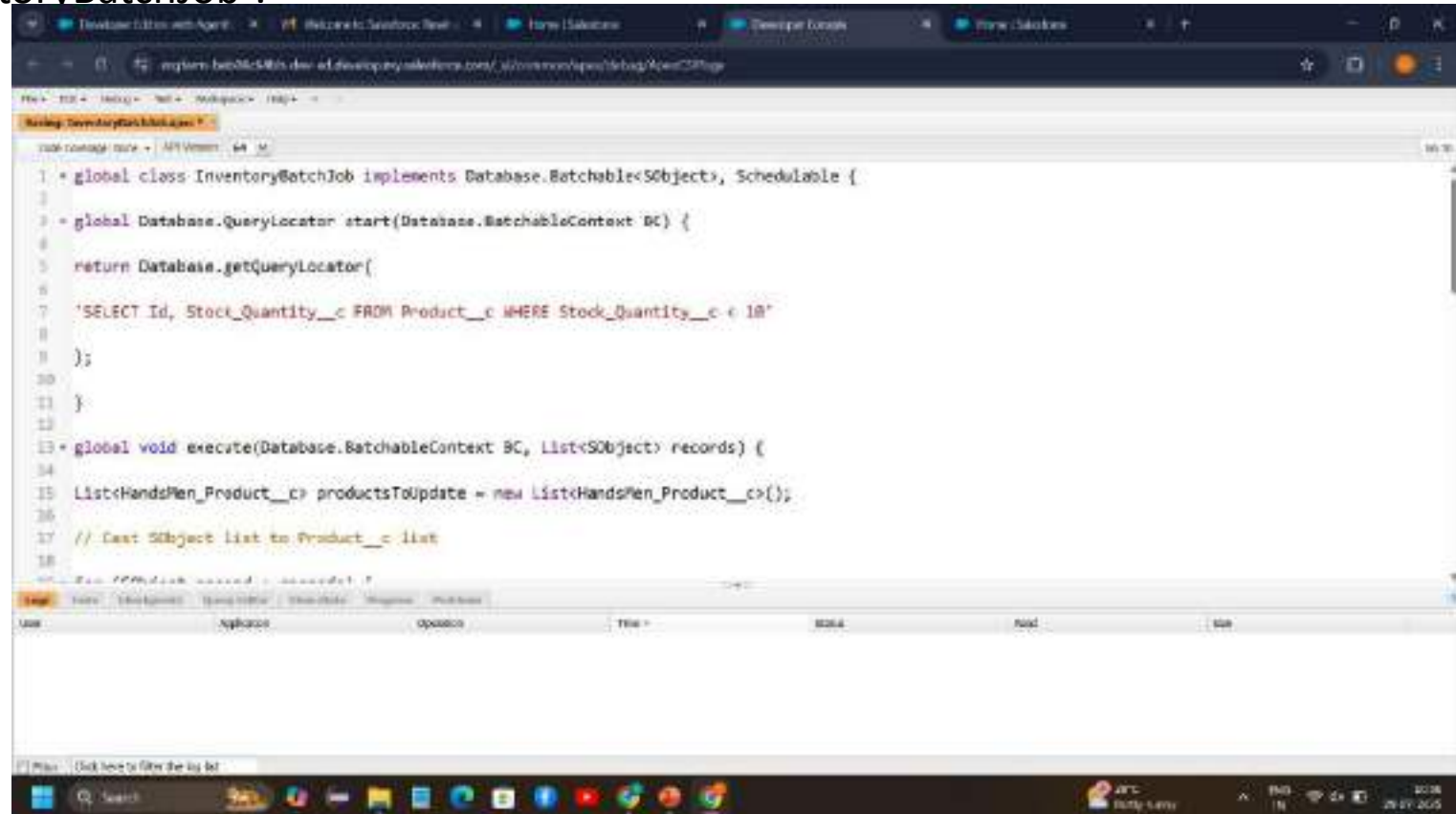
To create a new Apex Class follow the below steps:

Click on the file → New → Apex Class.

Give the Apex Class name as “InventoryBatchJob”.

Click ok.

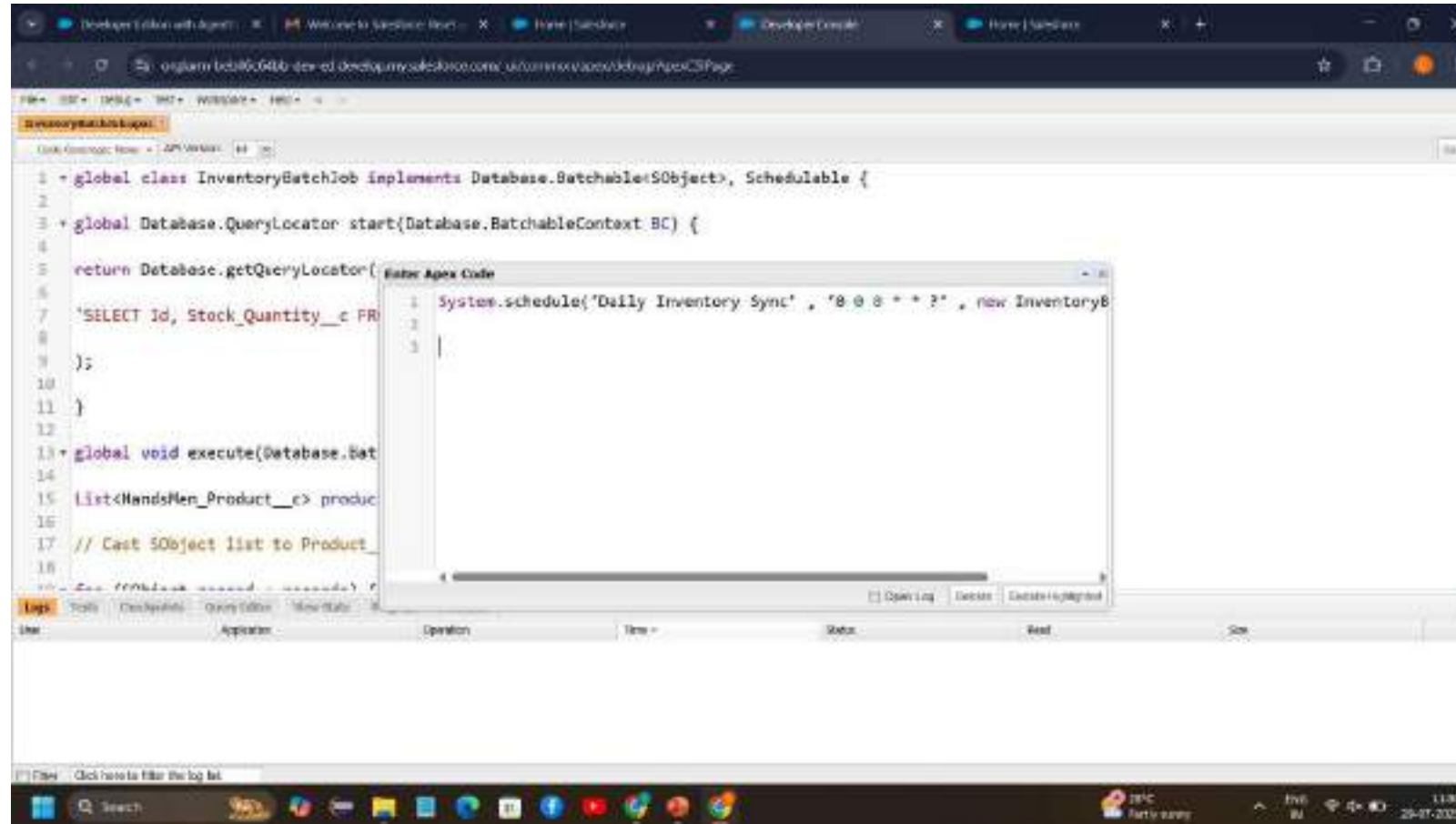
Now write the code logic here



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

Activity 2

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



Thank You