

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

USE CASE:

Developing a premium fashion platform to streamline men's bespoke tailoring and enhance customer experience through

personalized styling and seamless order management.

Project Overview

1. Project Phases

Phase 1: Architecture & Planning

Define objects, fields, relationships, formula fields.

Establish validation rules, flows, Apex triggers, batch jobs.

Design email templates for notifications and customer communication.

Phase 2: Development

Object and field creation.

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

Set up data security and sharing rules.

Develop batch jobs for scheduled processing.

Configure email templates and notifications.

Phase 3: Testing & QA

Unit testing of objects and automation.

End-to-end testing with sample data.

Performance testing and security checks.

Phase 4: Deployment & Training

Deploy to production.

Train users on new functionality. Post-go-live support and monitoring

Deliverable:

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

Salesforce Credentials Setup


Creating Developer Account



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

Sign up for your Developer Edition.

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



Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name

chopki

Last name

ramteer

Job title

Developer

Work email

ramteerchopki@gmail.com

Company

ank

Country/Region

India

You may need to provide an address in your country to receive a Developer Edition license key.

☒ I agree to the [Salesforce Privacy Policy](#), [Salesforce Terms of Service](#), and [Salesforce Platform License](#), as described in the [Developer Documentation](#). (If the Developer Edition license includes features and other capabilities not included in the [Salesforce Developer Edition](#), I agree to use those features and this app, and may terminate any app that has been installed for 60 days.)

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

☒ I'm not a robot



Account Activation

Welcome to Salesforce Recruit

Home | Salesforce

mail.google.com/mail/u/0/?ui=bow/FMlccpQpgrRbssZMNDsMSMPJhHugGOR

Search mail

Compose

Inbox 324

Starred

Snapped

Sent

Drafts

More

Labels

Welcome to your Developer Edition

Hi Dragal,

Thanks for signing up for a Developer Edition. Now you can start building on Salesforce for free and get hands-on with Agentforce and Data Cloud.

There's just one more step. Use the following link to reset the password for your Developer Edition. This link expires in 24 hours.

Reset Password

To easily log in later, save this URL:
<https://orgfarm-beb05c64bb-dev-ed.develop.my.salesforce.com>

Here's the username for your Developer Edition:
samranchagal636@agentforce.com

Your Developer Edition, now enabled with Agentforce and Data Cloud, remains active as long as you continue to use it. It expires after 45 days of non-usage.

Again, welcome to Salesforce!
Developer Relations

1 of 44

Enable desktop notifications for Gmail

OK

No thanks

X

Search

37°C
Partly sunny

ENG
IN

13:40
28-07-2025

Browser tabs: Inbox (24) - sam@chagal... 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

Leads: 0

- 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, Taskbar icons, System tray: 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

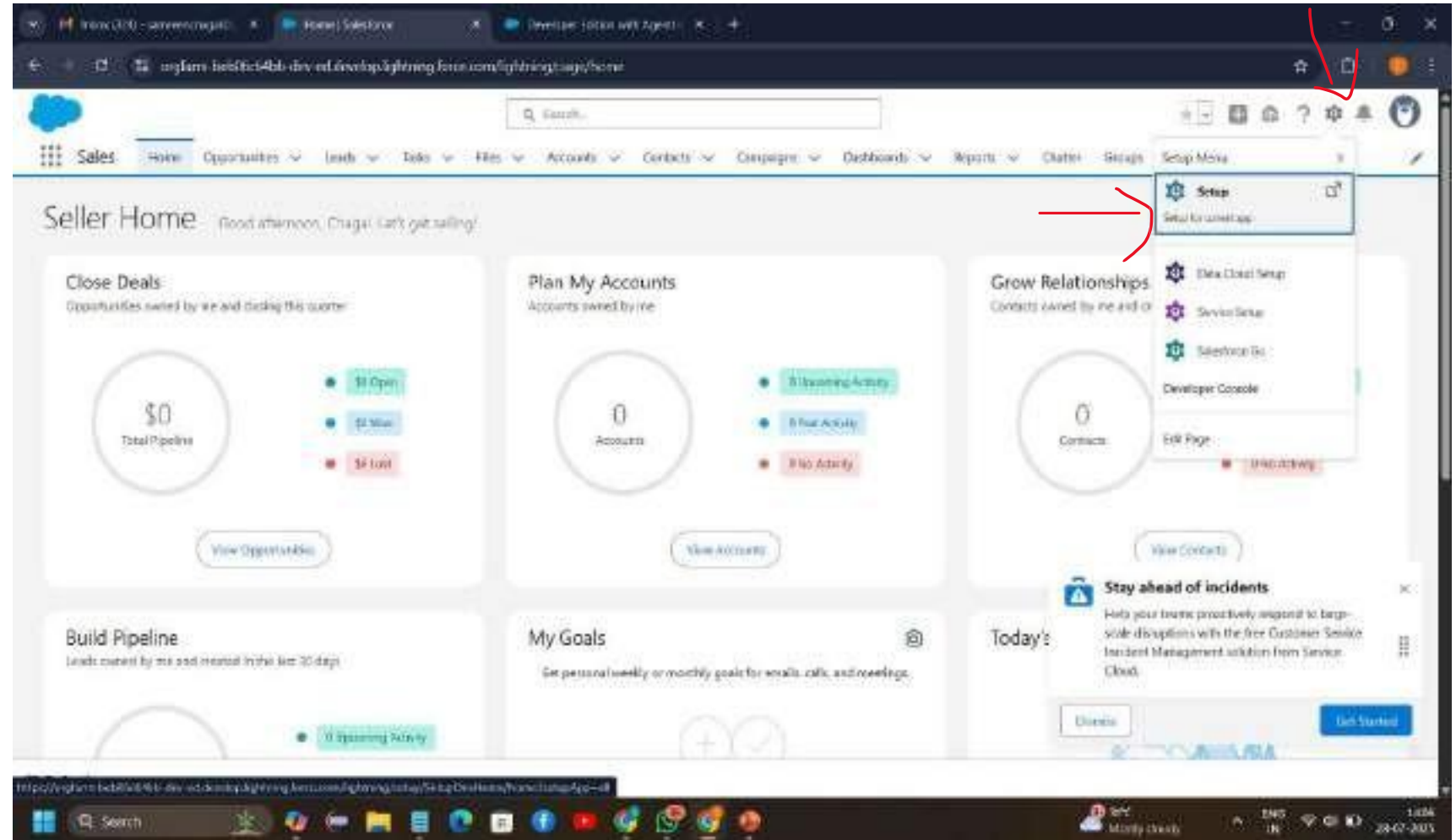
Inventory

Marketing Campaign

Object - HandsMen Customer

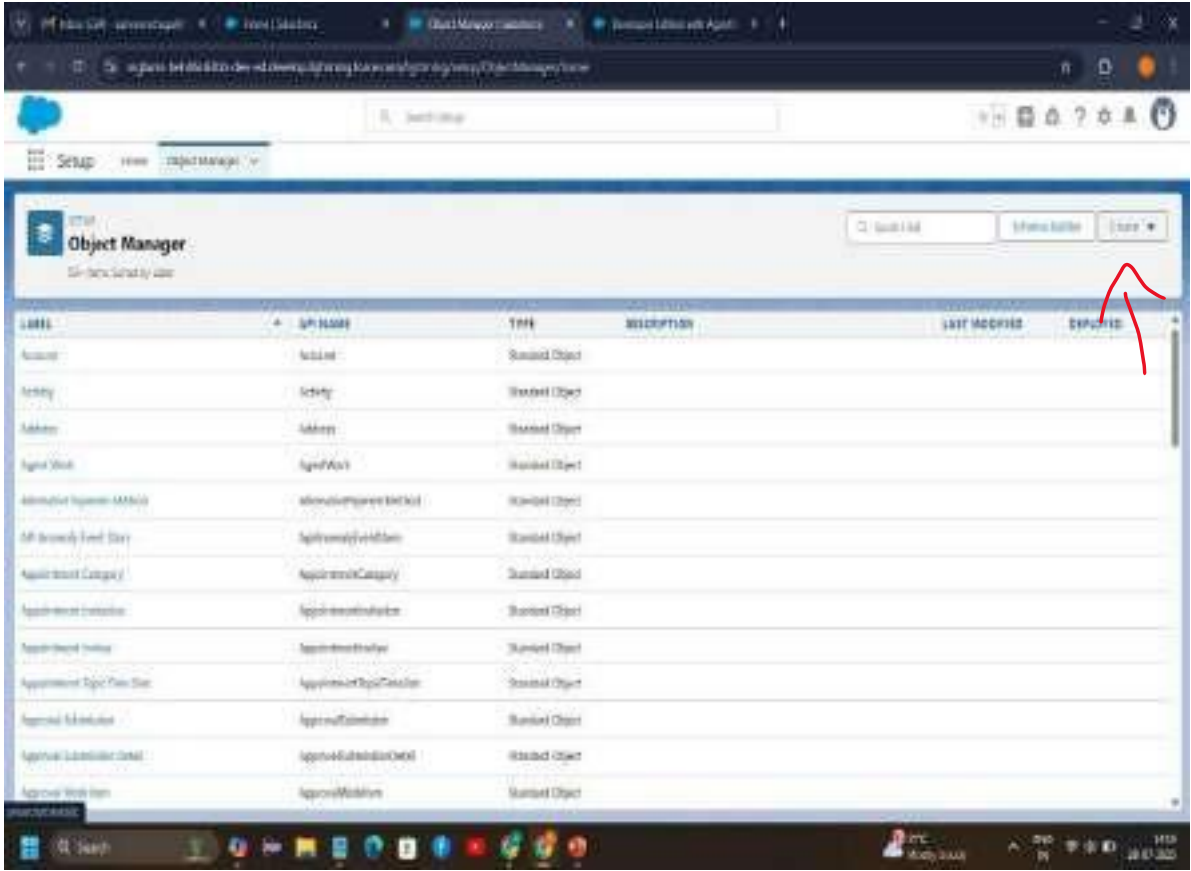
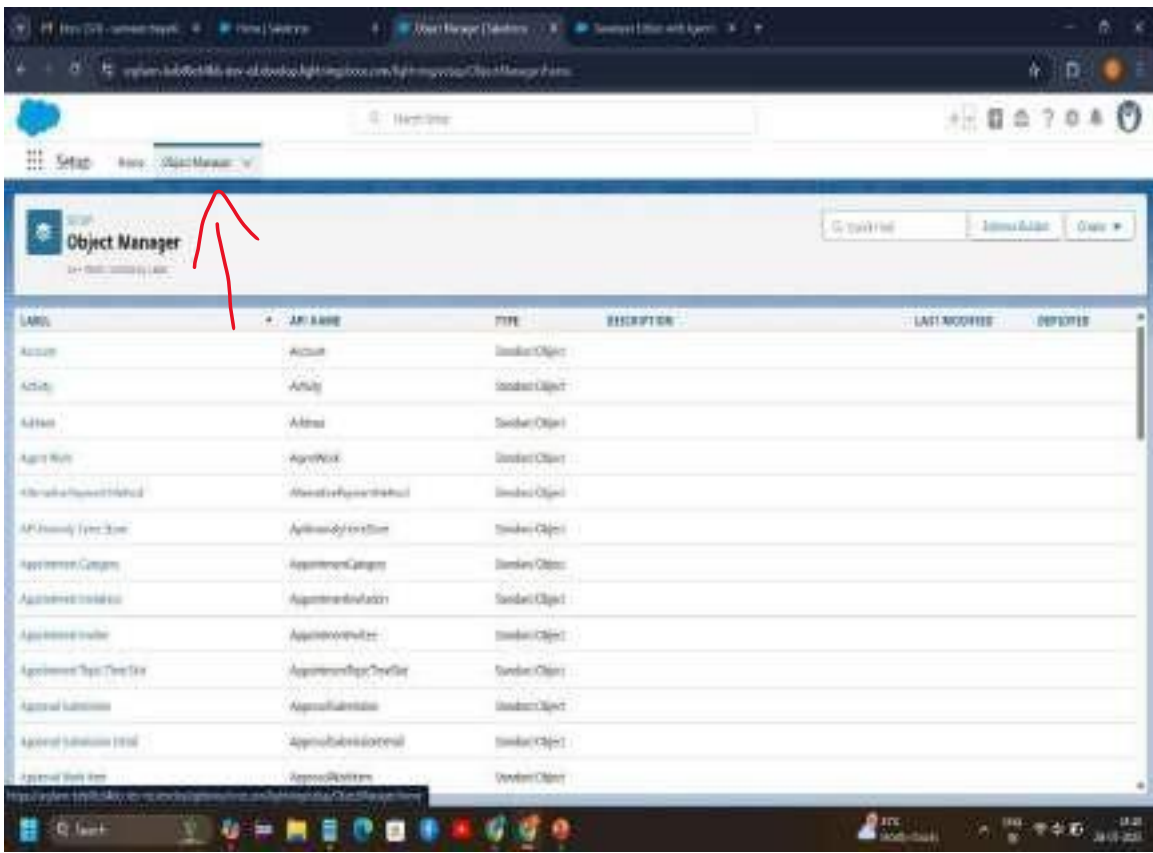
Description

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

Object Manager

33+ Items Sorted by Label

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 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 'Custom Object Information' section is active. The 'Label' field is 'HandsMen Customer' (indicated by an orange arrow). The 'Plural Label' is 'HandsMen Customer'. The 'Object Name' is 'HandsMen_Customer'. The 'Record Name' field is 'HandsMen Customer Name' (indicated by an orange arrow). The 'Data Type' is 'Text'. A warning message is displayed: '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.

The screenshot shows the Salesforce 'New Custom Object' setup page. The browser address bar indicates the URL is `orgfarm-b6b06c64bb-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`. The page title is 'New Custom Object'. The 'Allow Reports' checkbox is checked. The 'Object Classification' section includes 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access', all of which are checked. The 'Deployment Status' section shows 'Deployed' as the selected option. The 'Search Status' section shows 'Allow Search' as the selected option. The 'Object Creation Options' section includes '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. The 'Save' button is located at the bottom right of the page.

Setup
Home
Object Manager

New Custom Object

☒ Allow Reports
☐ Allow Activities
☐ Track Field History
☐ Allow in Chatter Groups
☐ Enable Licensing

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

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

Deployment Status
☐ In Development
☒ Deployed [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

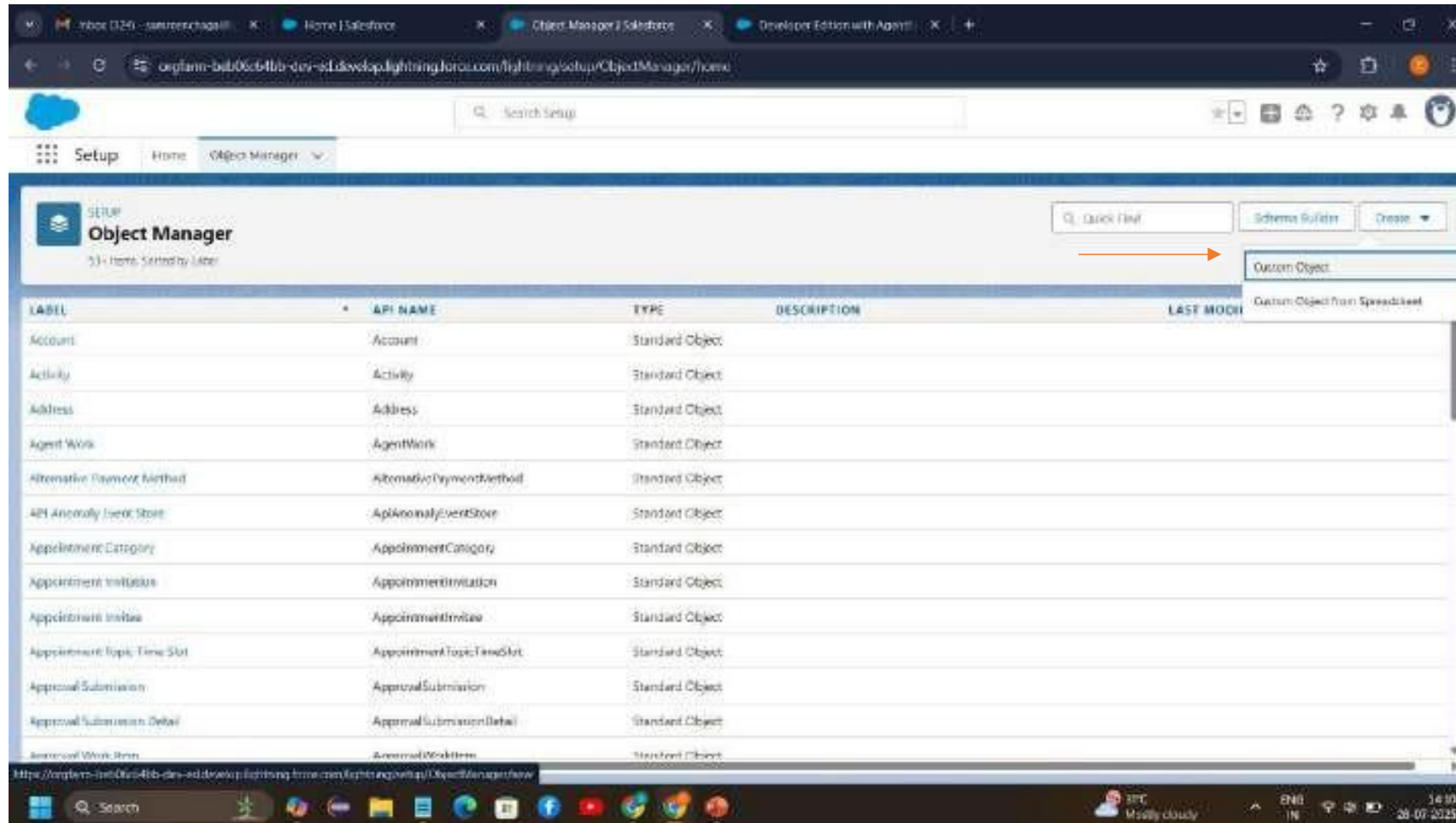
Object Creation Options (Available only when custom object is first created)
☐ Add Notes and Attachments related list to default page layout
☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

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 top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header area contains a search bar, a 'Quick Find' button, and a 'Create' button with a dropdown arrow. An orange arrow points from the 'Create' button to the 'Custom Object' option in the dropdown menu. Below the header is a table listing 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 Initiative	AppointmentInitiative	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		

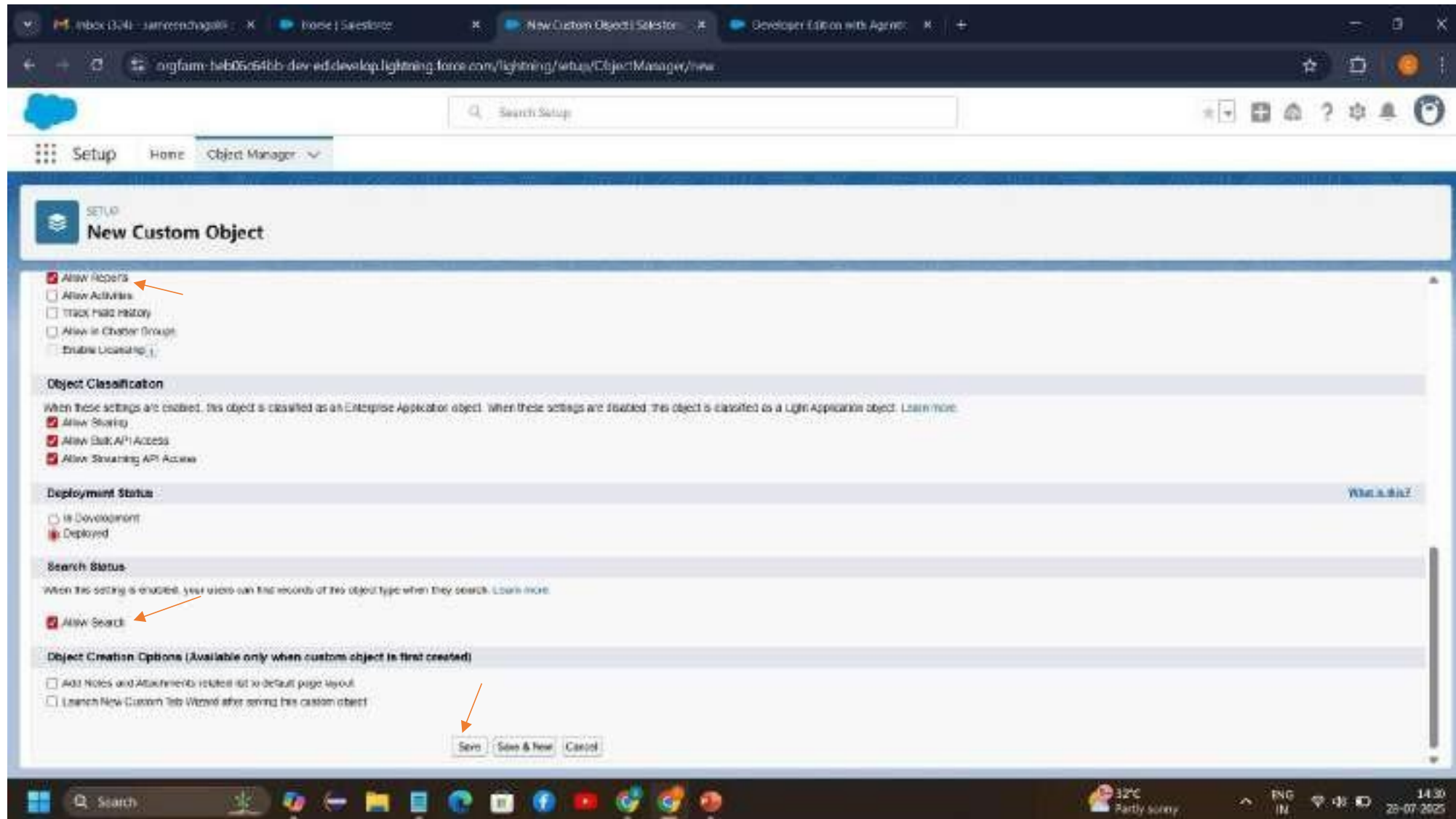
1. Enter the label name → HandsMen Product
2. Plural label name → HandsMen Products
3. Enter Record Name Label and Format
4. Record Name → HandsMen Product Name

- 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. An orange arrow points to the 'Label' field, which contains 'HandbMen Product'. Another orange arrow points to the 'Record Name' field, which contains 'HandbMen Product Name'. The 'Data Type' is set to 'Text'. The 'Allow Reports' checkbox is checked. The 'Allow Search' checkbox is also checked. The 'Save' button is at the bottom right.

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.

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 'Quick Find' search bar, 'Schema Builder', and a 'Create' dropdown menu. The 'Create' dropdown is open, showing 'Custom Object' and 'Custom Object from Spreadsheet'. An orange arrow points to the 'Custom Object' option. Below the header is 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 has a search bar at the top. The main content area is divided into sections. The first section, 'The singular and plural labels are used in tabs, page layouts, and reports:', contains fields for 'Label' (HandsMen Order) and 'Plural Label' (HandsMen Orders). The second section, 'The Object Name is used when referencing the object via the API:', contains a field for 'Object Name' (HandsMen_Order). The third section, 'Enter Record Name Label and Format:', contains fields for 'Record Name' (HandsMen Order Name), 'Data Type' (Auto Number), 'Display Format' (O-{0000}), and 'Starting Number' (001). An orange arrow points to the 'Record Name' field. The bottom of the page shows the Windows taskbar with various icons and the system clock.

Setup Home Object Manager

Search Setup

STNP
New Custom Object

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

Label: HandsMen Order Example: Account

Plural Label: HandsMen Orders Example: Accounts

Starts with word/sound: ☐

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

Object Name: HandsMen_Order Example: Account

Description:

Connect, translate help setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Custom Name:

Enter Record Name Label and Format

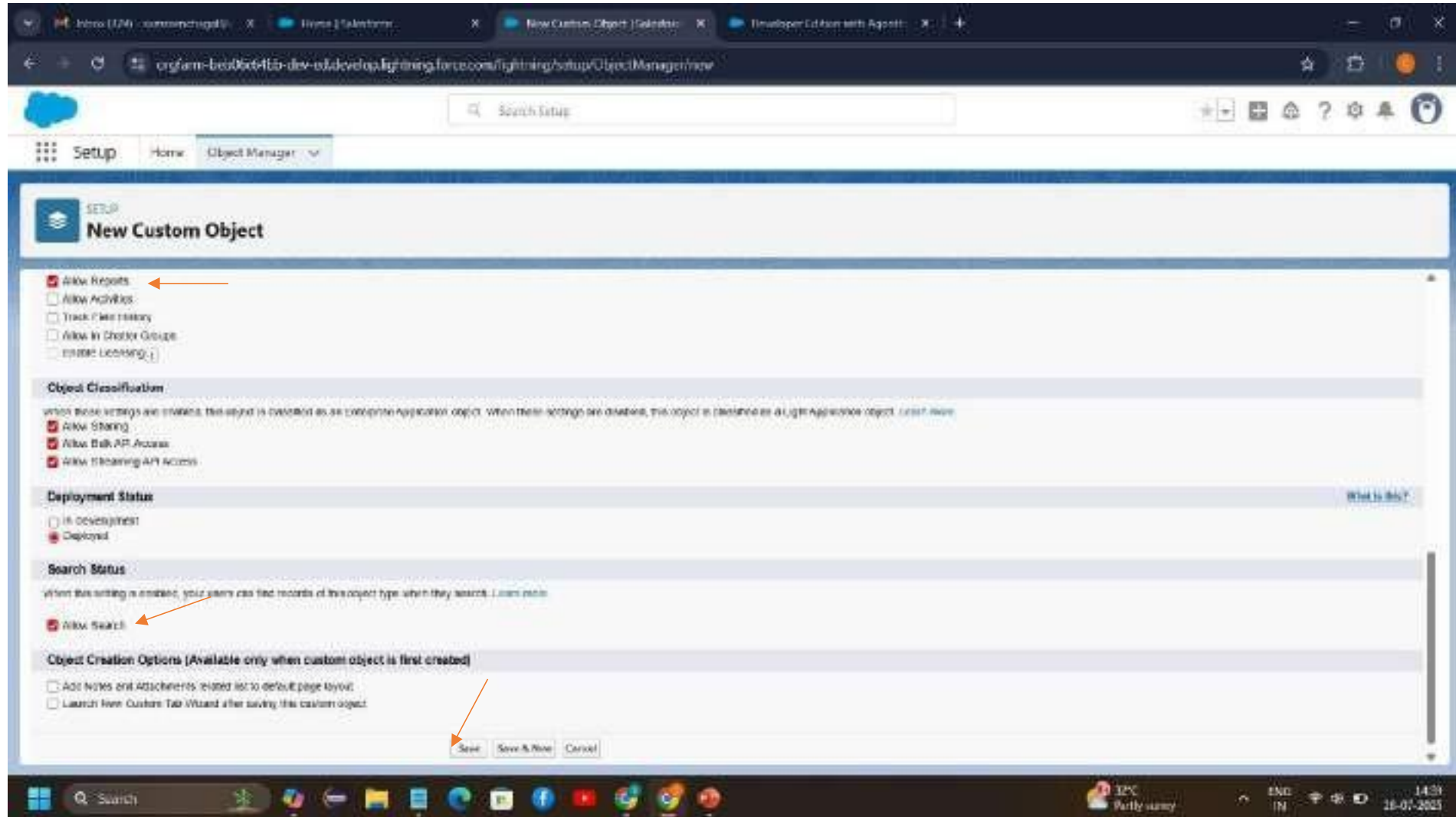
The Record Name appears in page layouts, key tabs, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: HandsMen 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 VISUAL IS TEXT

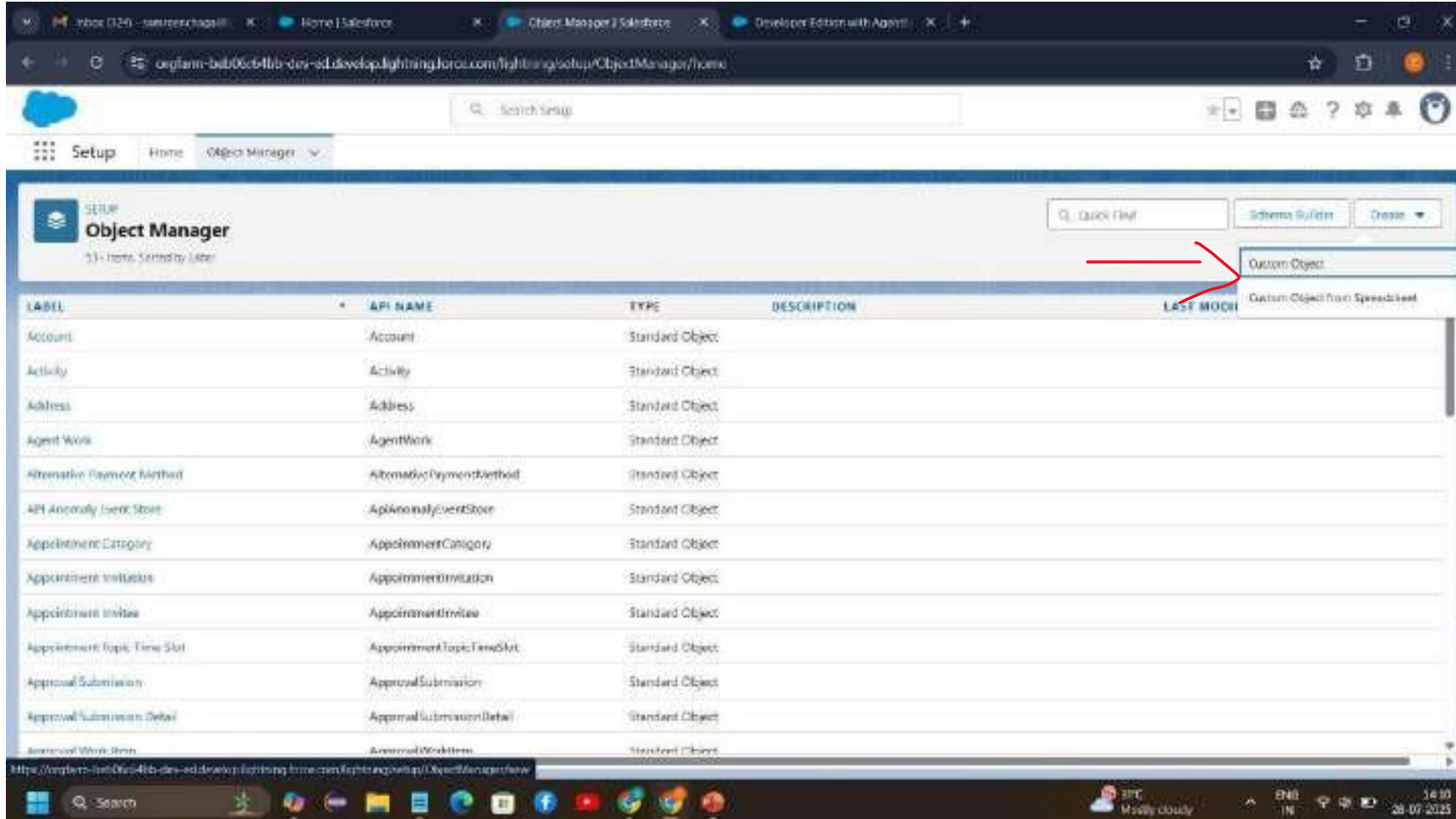
Starting Number: 001



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. A 'Quick Find' search bar is present. To the right of the search bar, there's a 'Create' button with a dropdown menu. A red arrow points to the 'Custom Object' option in this dropdown menu. Below the header, a table lists 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 Initiative	AppointmentInitiative	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		

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

Label: Example: Account

Plural Label: Example: Accounts

Sorts with view/record: ☐

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

Object Name: Example: Account

Description:

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

Custom Name:

Enter Record Name Label and Format

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

Record Name: Example: Account Name

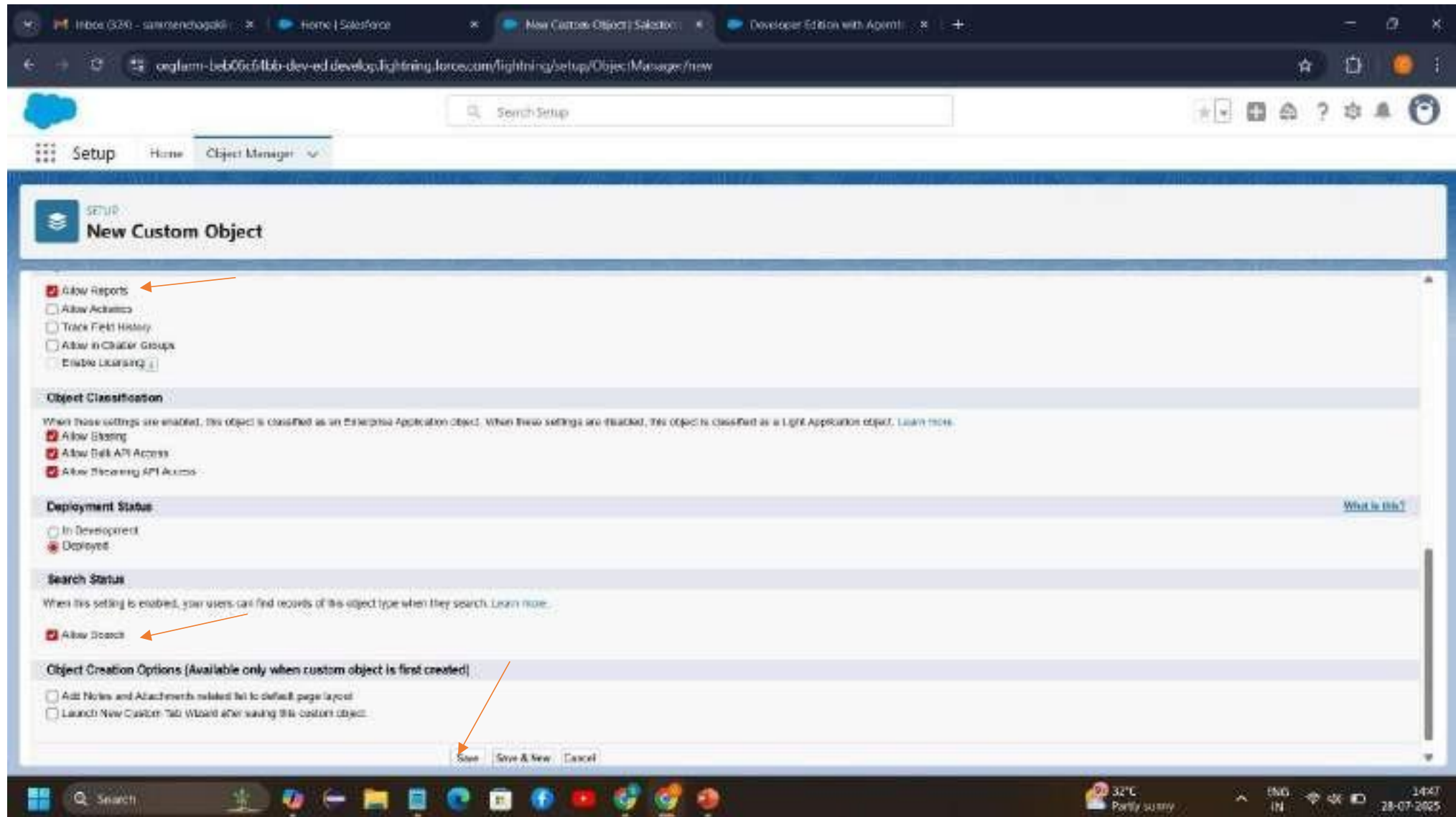
Data Type: Warning: If you plan to insert a high volume of records in this object, use the API for example, use the Text data type.

Display Format: Example: A-{0000} 0000000000

Starting Number:

Click on Allow reports,

Allow search → **Save**



Object - Marketing Campaign

To create an object:

- From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
- Enter the label name → Marketing Campaign

- Plural label name → Marketing Campaigns
- Enter Record Name Label and Format
- Record Name → Marketing Campaign Number
- Data Type → Auto Number
- Display Format → MC -{0000}
- Starting Number → 001

The screenshot shows the 'New Custom Object' setup page in Salesforce. The page is titled 'New Custom Object' and has a sub-header 'Create a custom object name'. Below this, there are several sections for configuring the object.

Object Name and Label: The 'Label' field is set to 'Marketing Campaign' with an example of 'Account'. The 'Plural Label' is set to 'Marketing Campaigns' with an example of 'Accounts'. The 'Start with plural record' checkbox is unchecked.

Object Name: The 'Object Name' field is set to 'Marketing_Campaign' with an example of 'Account'.

Description: There is a large text area for the description, which is currently empty.

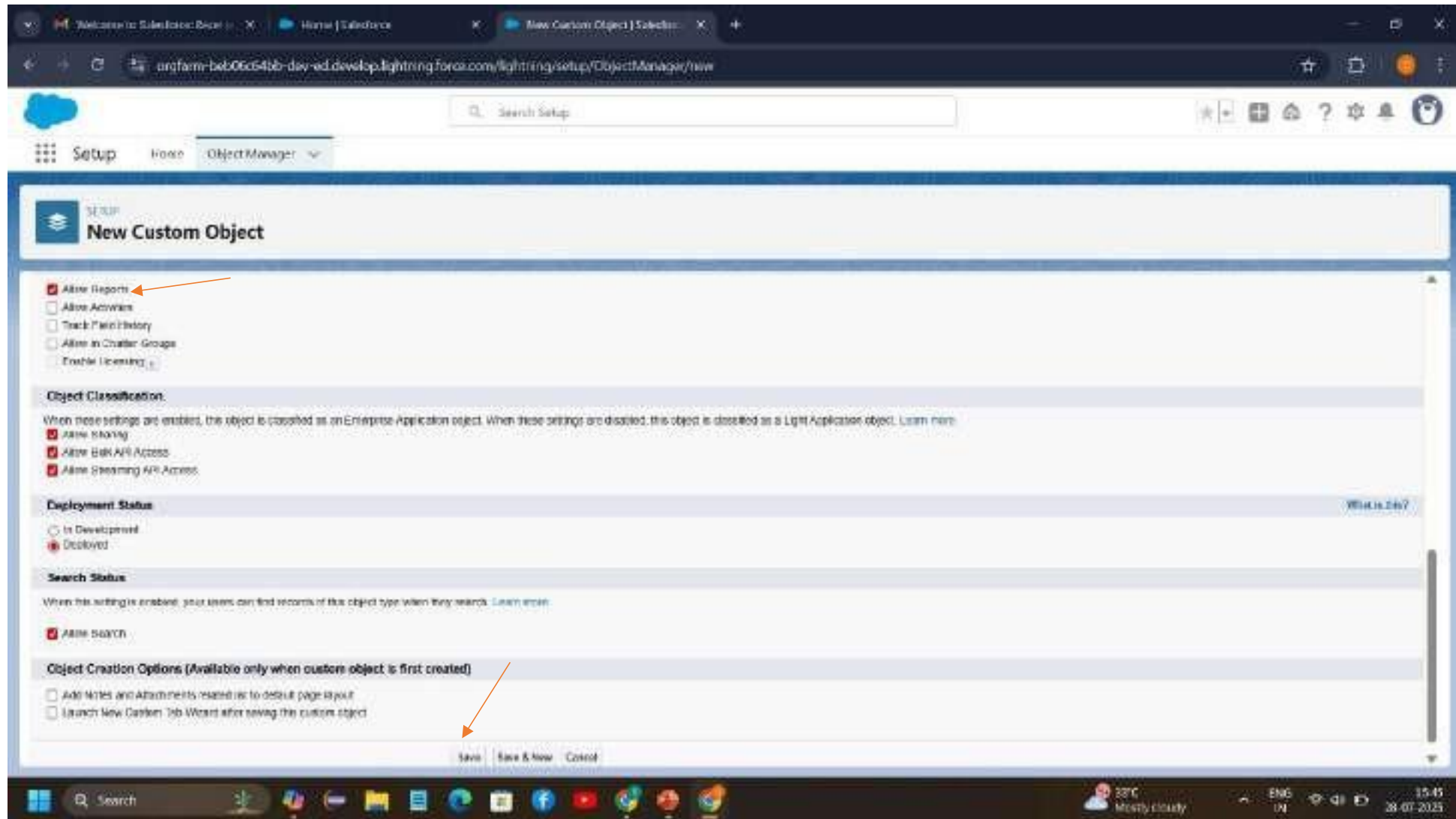
Custom Settings: There are two checkboxes: 'Custom Settings Help Setting' (checked) and 'Open the standard Salesforce.com help & Training pages' (unchecked).

Enter Record Name Label and Format: This section is titled 'Enter Record Name Label and Format'. It contains the following fields:

- Record Name:** 'Marketing Campaign Name' with an example of 'Account Name'.
- Data Type:** 'Auto Number' with a warning: 'Warning: If possible to insert a high volume of records in this object, use the API for example, use the Tool data type'.
- Display Format:** 'MC -{0000}' with an example of 'X-0000' and a link to 'Start to Top'.
- Starting Number:** '001'.

Click on Allow reports,

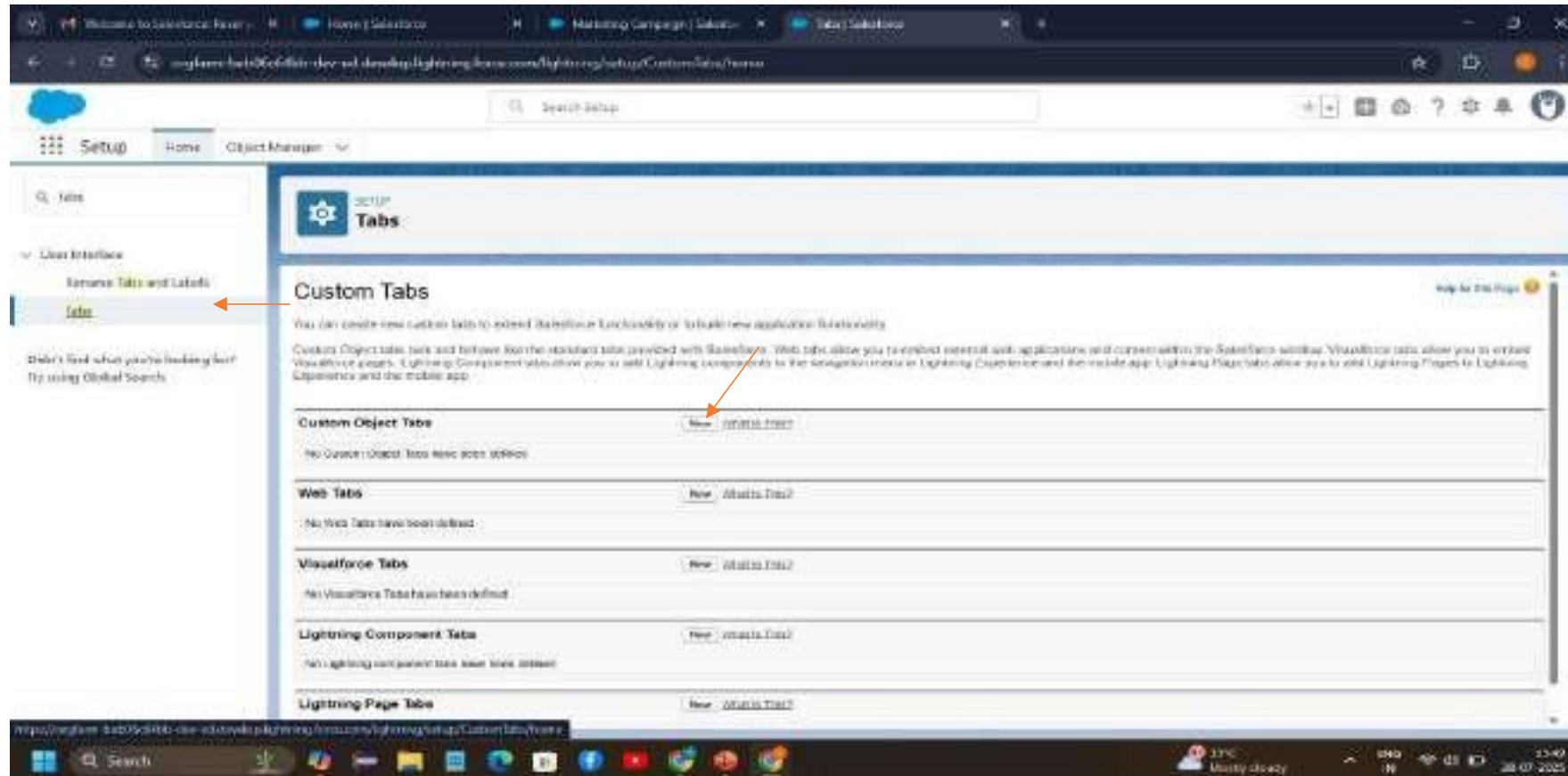
Allow search → Save



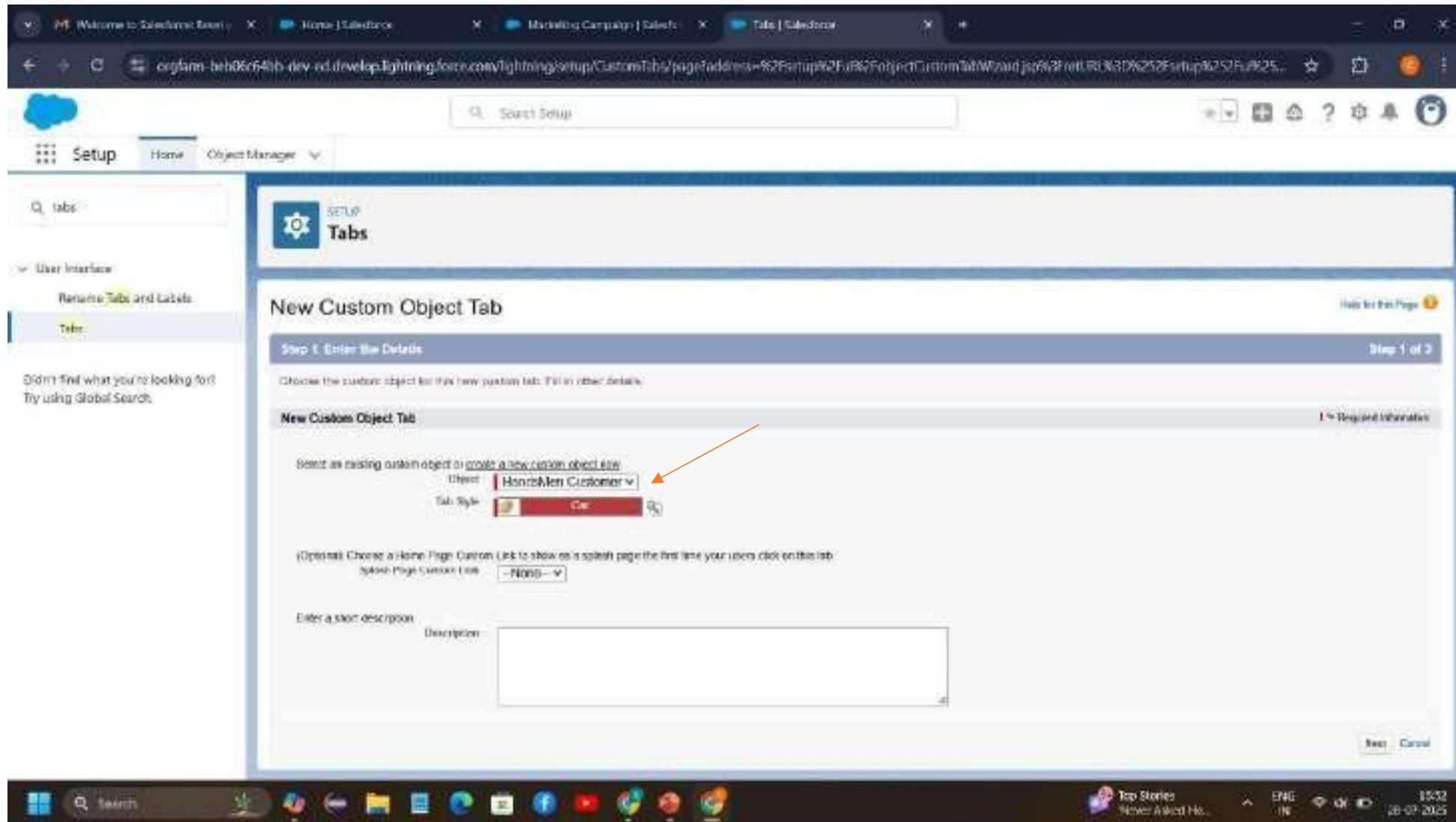
Data Management - Tabs

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

The screenshot shows the Salesforce Setup interface for configuring tabs. The left sidebar contains the 'Setup' menu and a search bar. The main content area is titled 'Step 2, Add to Profiles' and includes a table of user profiles with a 'Tab Visibility' column. The 'Apply one tab visibility to all profiles' option is selected.

Step 2, Add to Profiles

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

☒ Apply one tab visibility to all profiles (Default On)

☐ Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Appoint Integration	Default On
Authenticated Website	Default On
Authenticated Website	Default On
CRM Reporting Portal Buyer Profile	Default On
Content Manager	Default On
Cross Org Data Proxy User	Default On
Custom Marketing Profile	Default On
Custom Sales Profile	Default On
Custom Support Profile	Default On
Customer Community Login User	Default On

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

Browser tabs: Welcome to Salesforce (Test)... Home | Salesforce Marketing Campaign | Salesforce Tabs | Salesforce

Address bar: orgfam1-bet06c68bb-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=92Fsdup%2Fu%2FobjenCustomTabWizard.js%3FretURL%3D%252Fsetup%252Fu%252F...

Search Setup

Setup Home Object Manager

Setup Tabs

Search tabs

User Interface

- Rename Tabs and Labels
- Tabs**

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

My Salesforce	<input checked="" type="checkbox"/>
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"/>
Rules Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>
Bot Solutions (standard__LightningBots)	<input checked="" type="checkbox"/>
Data Cloud (standard__DataCloud)	<input checked="" type="checkbox"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>
My Service Journey (standard__MSAApp)	<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	

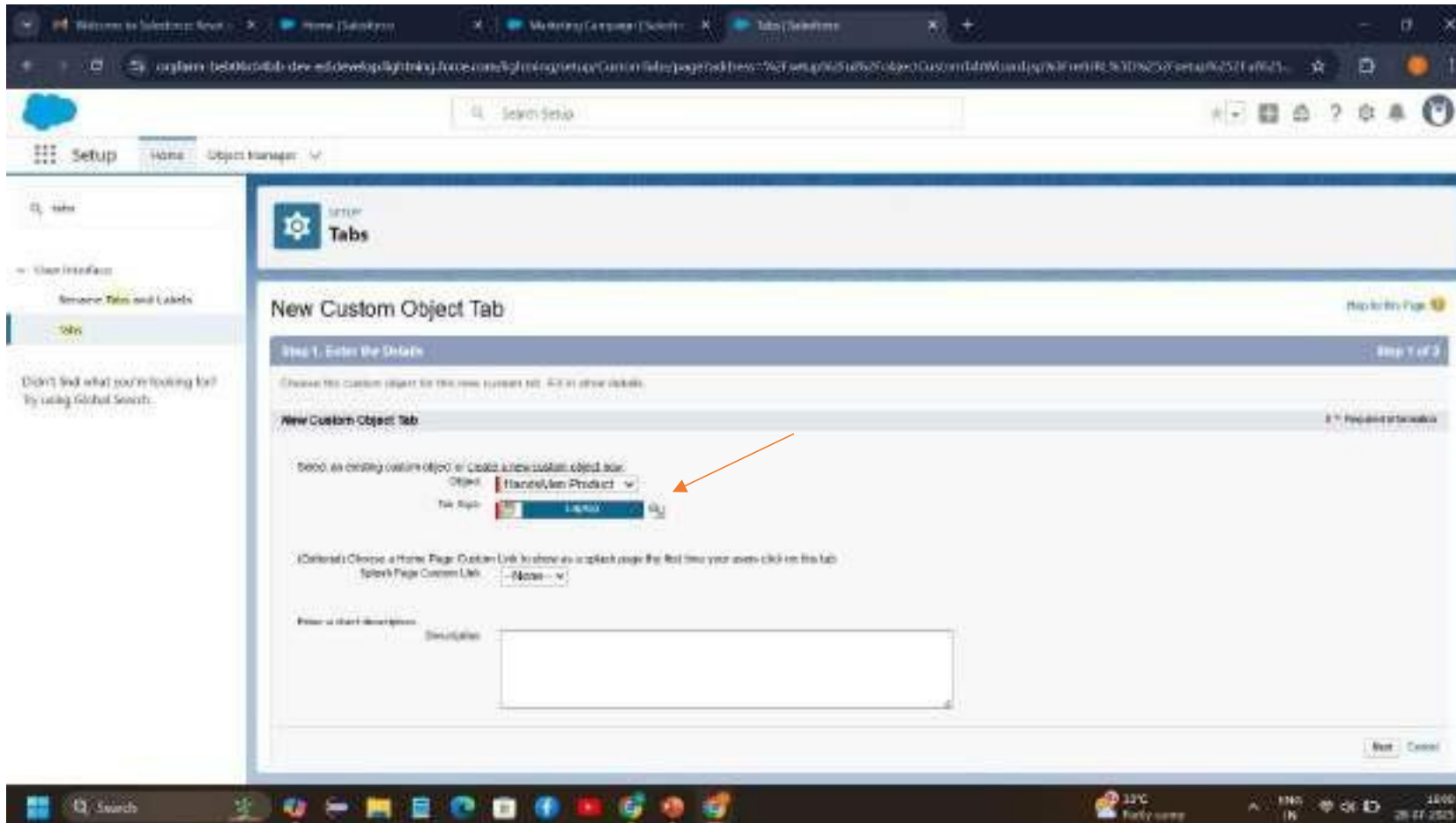
Previous Save Cancel

Taskbar: Search, 35% undep, 1.37%, ENG IN, 15:55, 28-07-2025

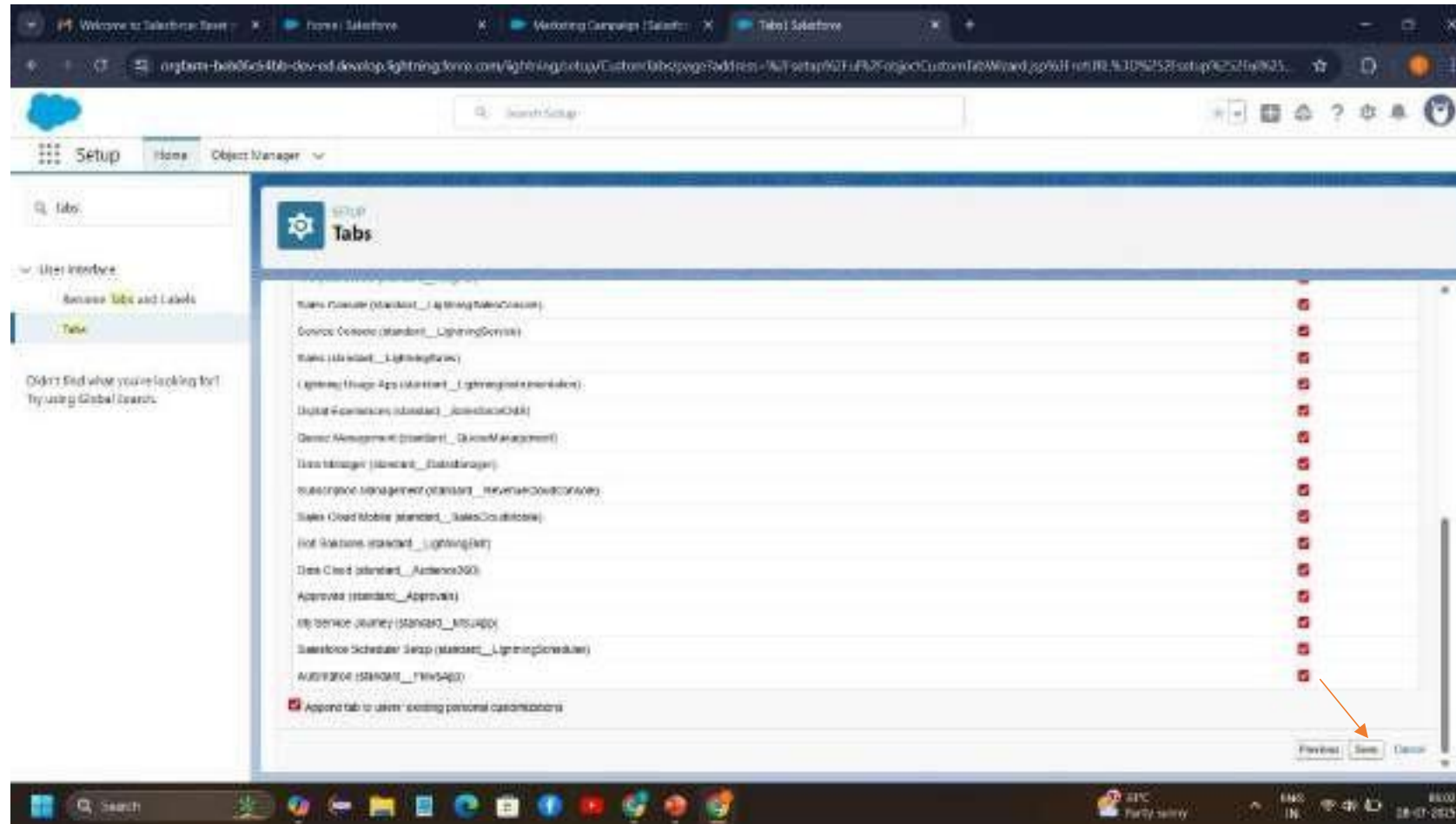
Create Tabs

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)

Welcome to Salesforce | Home | Salesforce | Marketing Campaign | Salesforce | Tabs | Salesforce

orgnam-bcd06d4bb-dev-ed:develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2FSetupCustomTabs%2FSetup%2FSetupCustomTabs%26viewURL%3D%26-w...

Search Setup

Setup | Home | Object Manager

tabs

User Interface

Rename Tabs and Labels

Custom Tabs

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

SETUP
Custom Tabs

Help for this Page

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.

Custom Object Tabs

New What's This?

Action	Label	Tab Style	Description
edit: Del	Handwritten Customer	Tab	
edit: Del	Handwritten Products	Large	

Web Tabs

New What's This?

No Web Tabs have been defined.

Visualforce Tabs

New What's This?

No Visualforce Tabs have been defined.

Lightning Component Tabs

New What's This?

No Lightning component tabs have been defined.

Search

1PC Party survey

ENC IN 9F: 05 03 11:15 28-01-2025

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.

Windows taskbar: VMware Workstation, Home | Salesforce, Marketing Campaign | Salesforce, Tabs | Salesforce

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

Address bar: orgfam-bob06c64bb-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=f62fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FrefURL%3D%2Fsetup%2Fui%252F...

Search Setup

Setup Home Object Manager

tab

User Interface

Rename Tab and Labels

Tab

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

SETUP Tabs

New Custom Object Tab

Help for this Page

Step 1 of 3

Step 1: Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Required Information

Select an existing custom object or create a new custom object now

Object: HandsMen Order

Tab Style: [Image]

(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 Area]

Next Cancel

Windows taskbar: Search, [Icons], 13°C Partly sunny, 16:05, 28-07-2023

Web browser tabs: Welcome to Salesforce PaaS, Home | Salesforce, Marketing Campaign | Salesforce, Tabs | Salesforce.

Address bar: org-[arm-beb06c64bb-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page/address=/%2Fsetup/%2Fui/%2FobjectCustomTabWizard.jsp/%2FnetURL/%2D%2Fsetup/%252Fui/%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

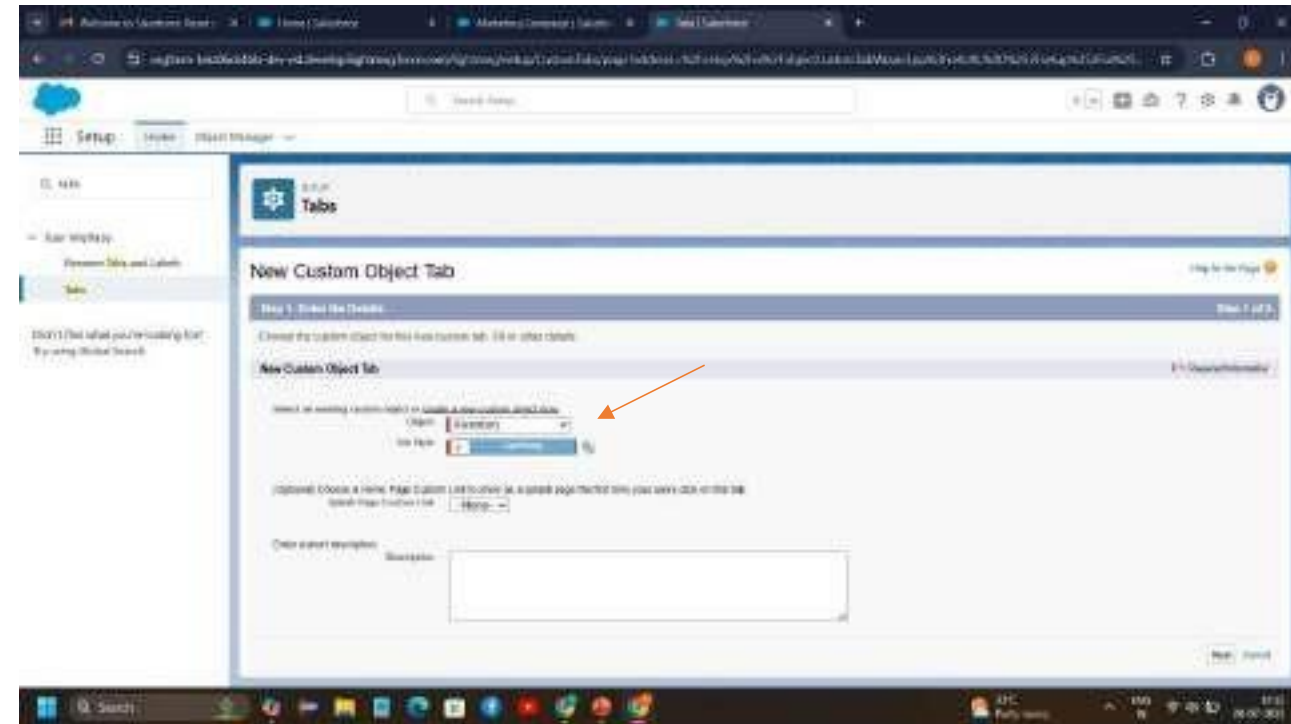
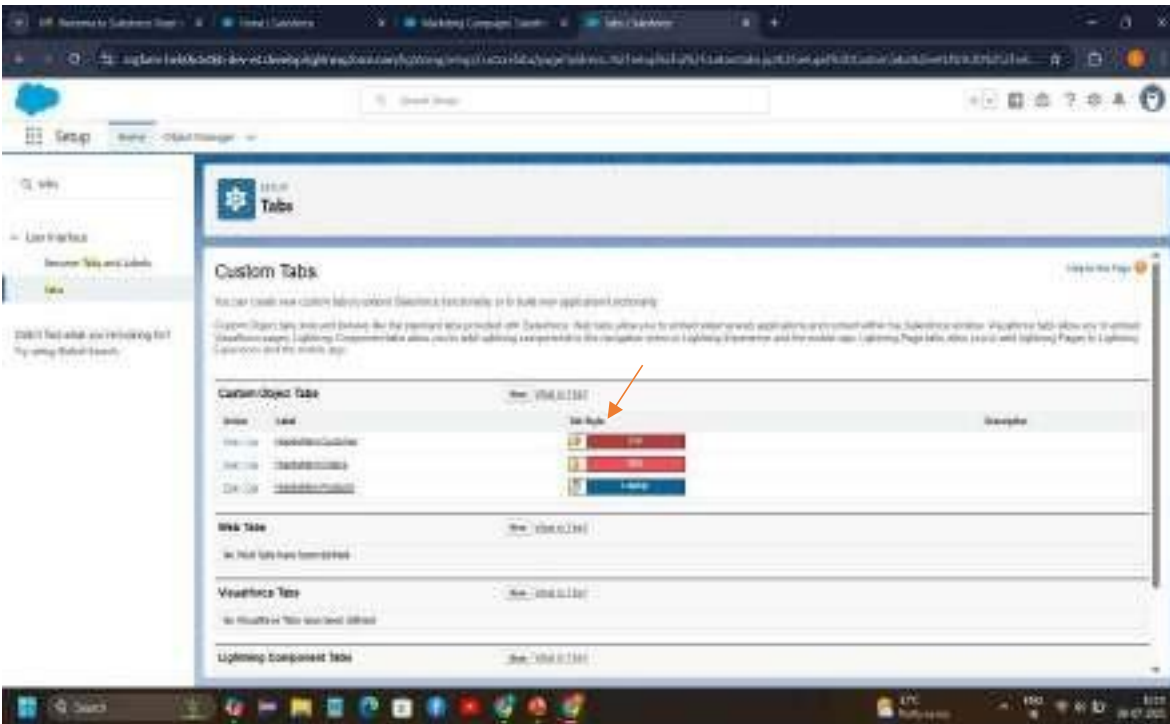
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" 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"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>
Data Cloud (standard__AudienceStd)	<input checked="" type="checkbox"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>
My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

Previous Save Cancel

Windows taskbar: Search, 33°C Partly sunny, ENG IN, 26-07-2023 16:04.

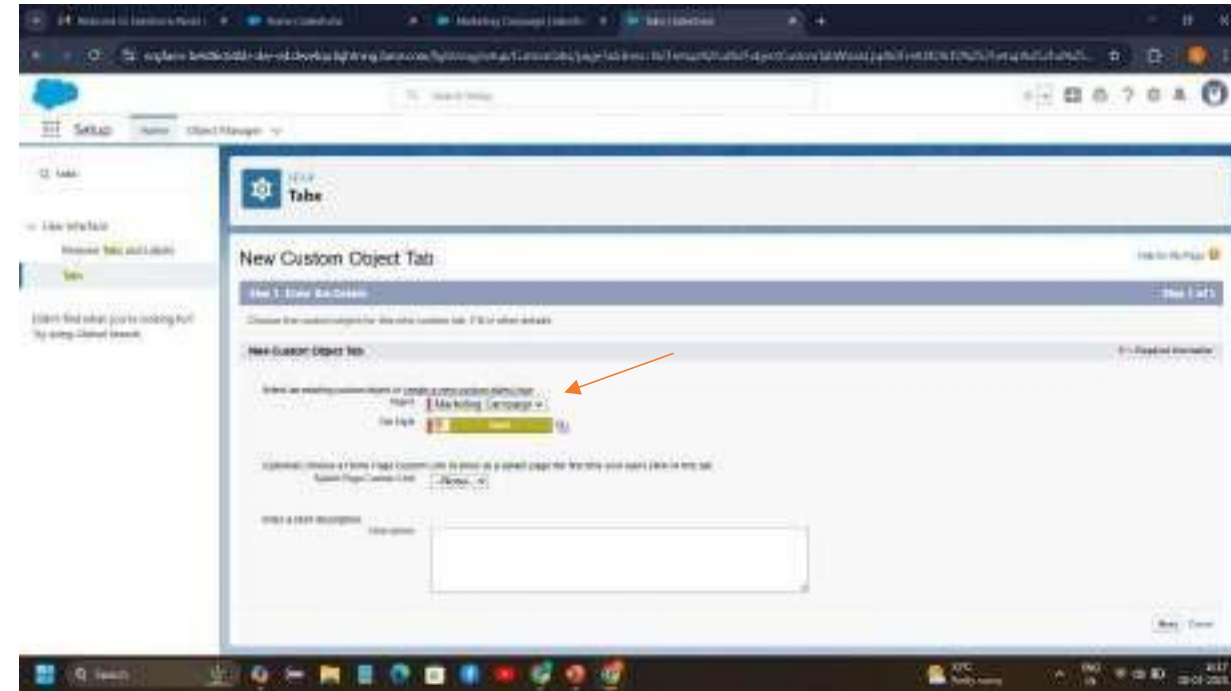
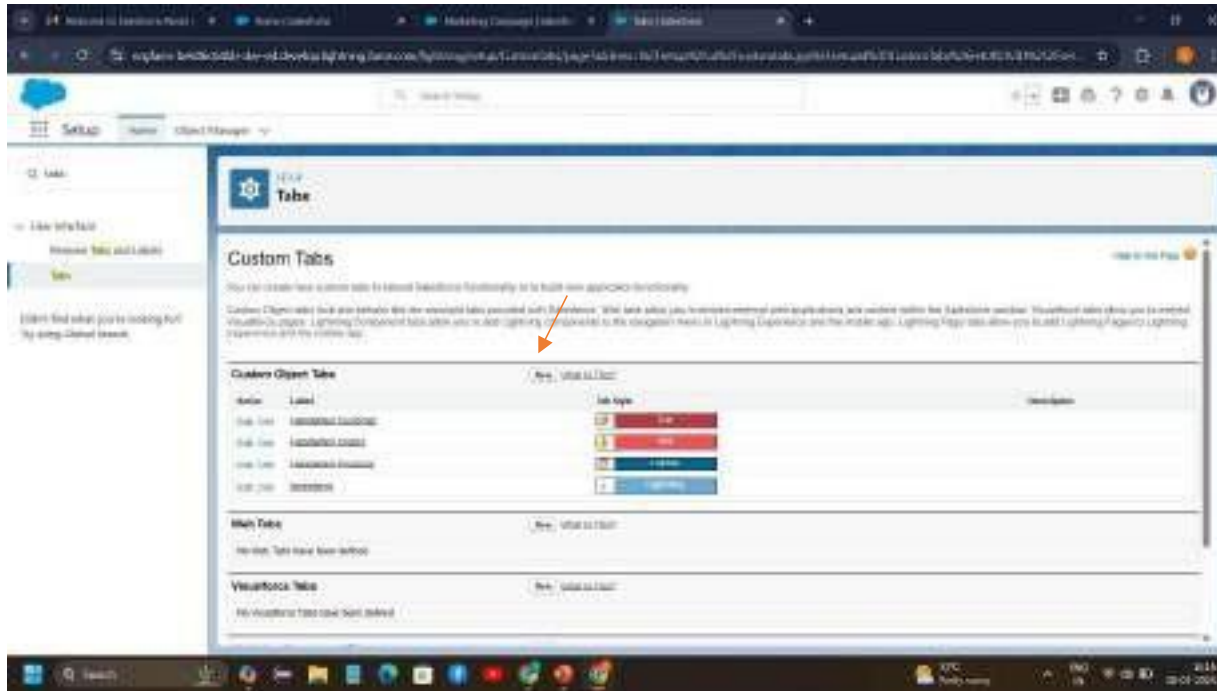
Creating a Custom Tab(Inventory) To create a Tab(Inventory)

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.

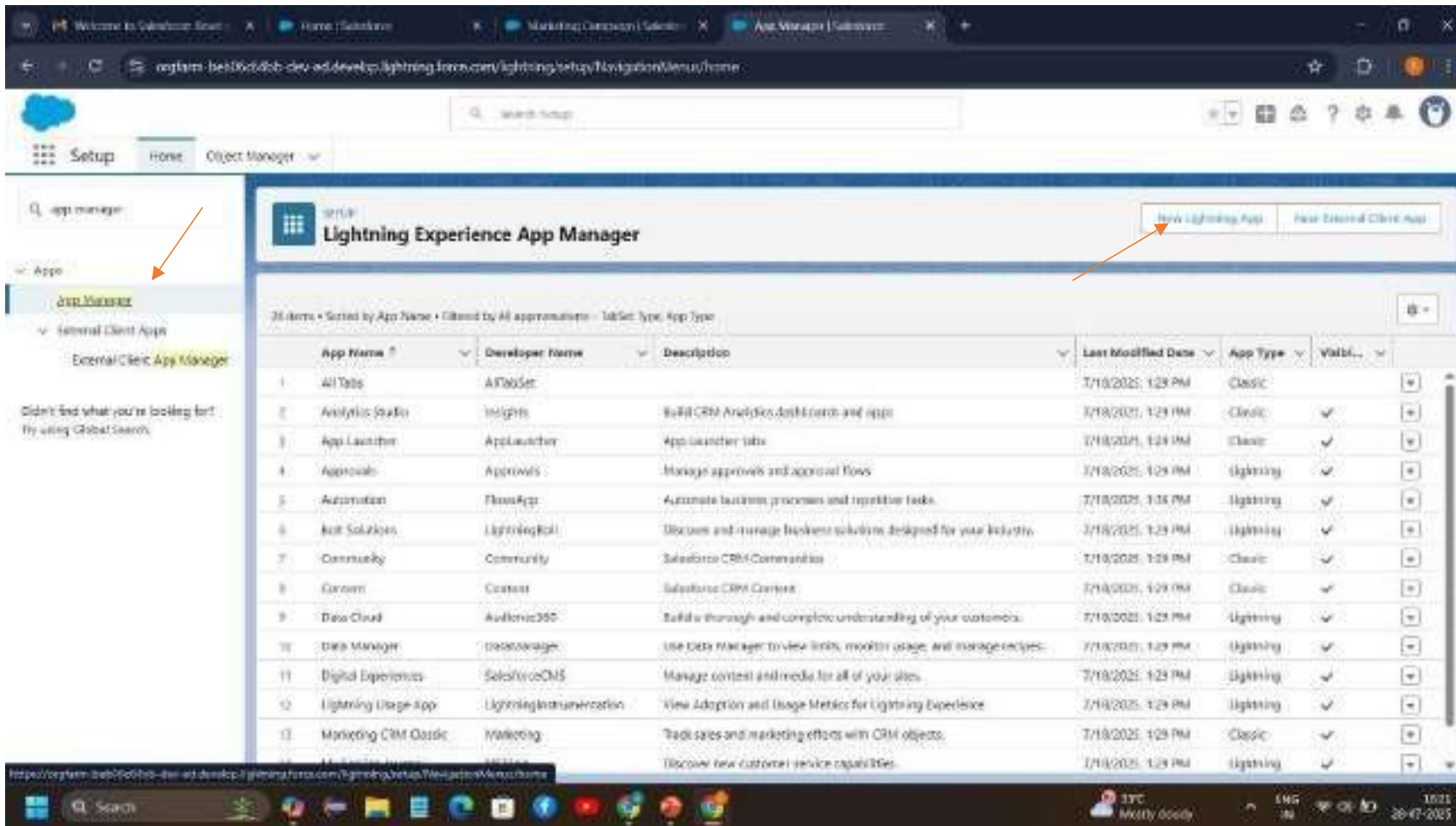


Data Management - App Manager

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

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name ⓘ
Handkies Threads

*Developer Name ⓘ
Handkies_Threads

Description ⓘ
Handkies Threads

App Branding

Image ⓘ
Upload

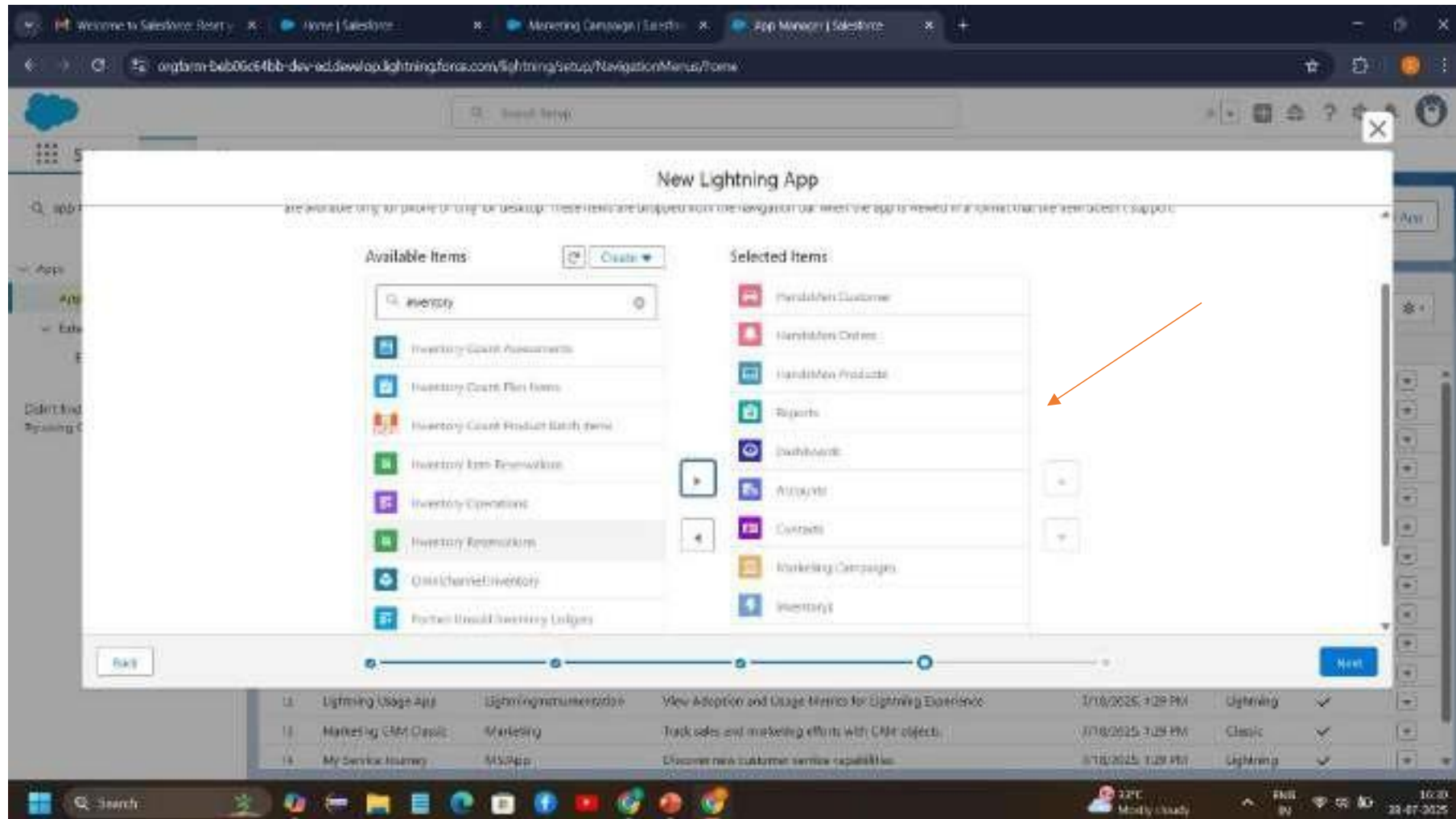
Primary Color Hex Value ⓘ
#0070C2

Org Theme Options
☐ Use the app's image and color instead of the org's master theme

Next

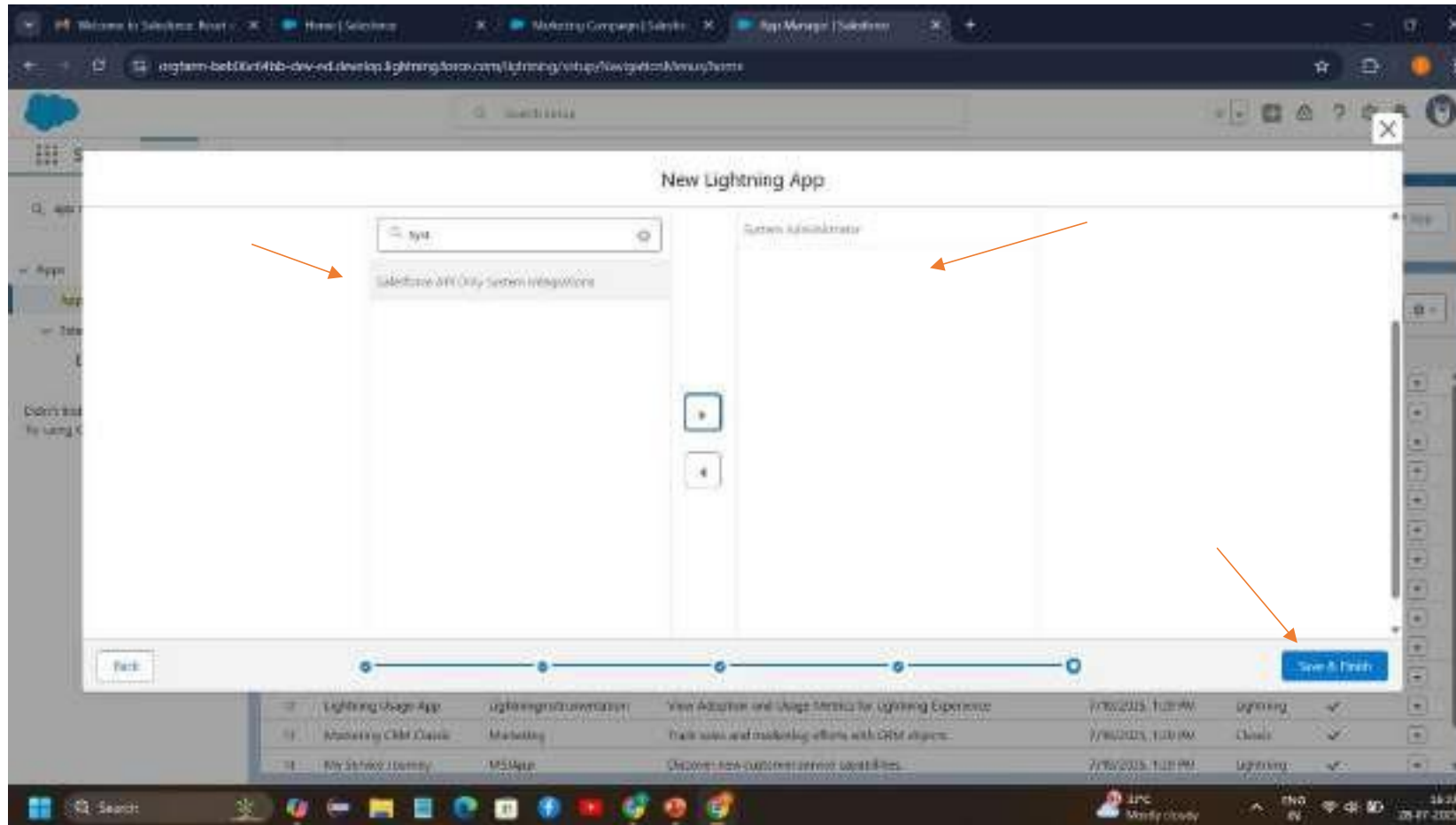
ID	Lightning App Name	App Organization	View Adoption and Usage Metrics for Lightning Experience	Created Date	Created By	Status
11	Lightning App	Aggcompturization	View Adoption and Usage Metrics for Lightning Experience	7/18/2025, 1:28 PM	Lightning	✓
12	Marketing CRM Data	Marketing	Track sales and marketing efforts with CRM objects	7/18/2025, 1:28 PM	Cloud	✓
13	My Service Journey	MSIAApp	Discover new customer service capabilities	7/18/2025, 1:28 PM	Lightning	✓

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



To Add User Profiles:

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



Data Management - Fields

Creating Field in HandsMen Customer Object

To create fields in an object:

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

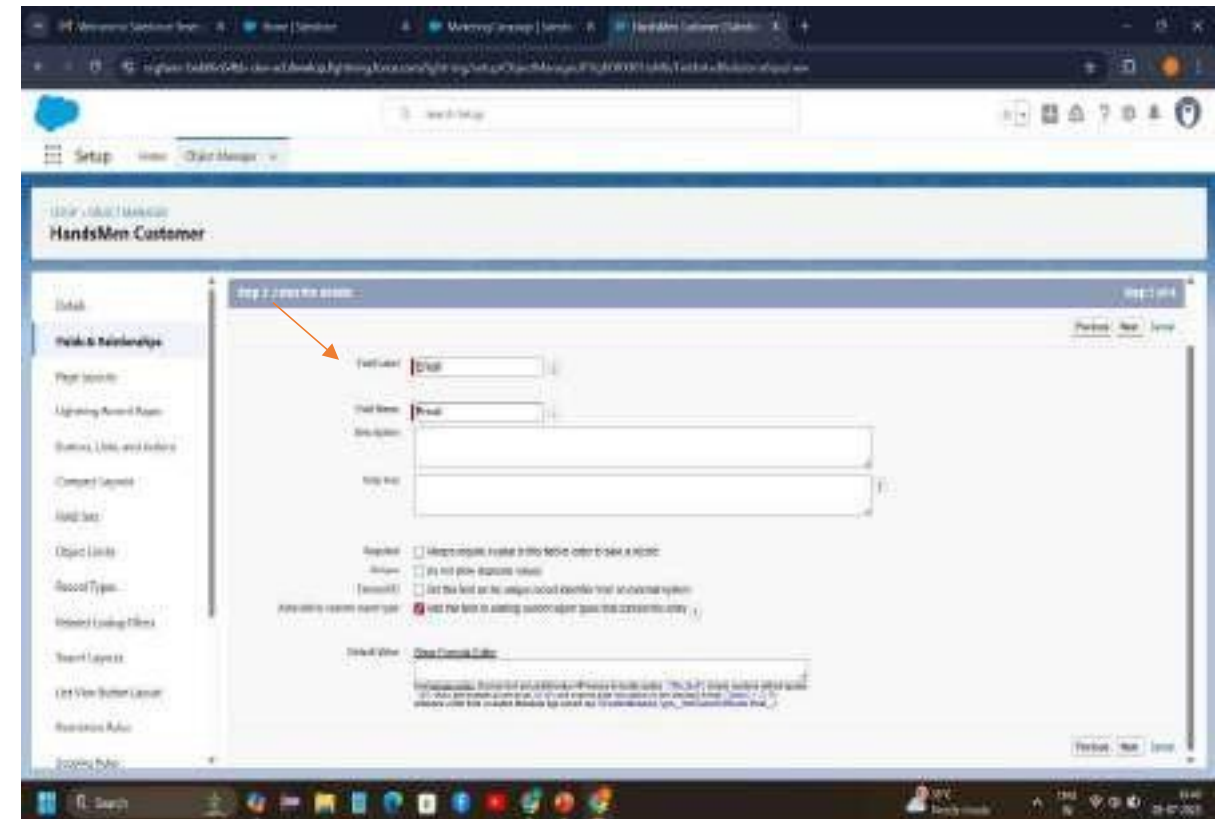
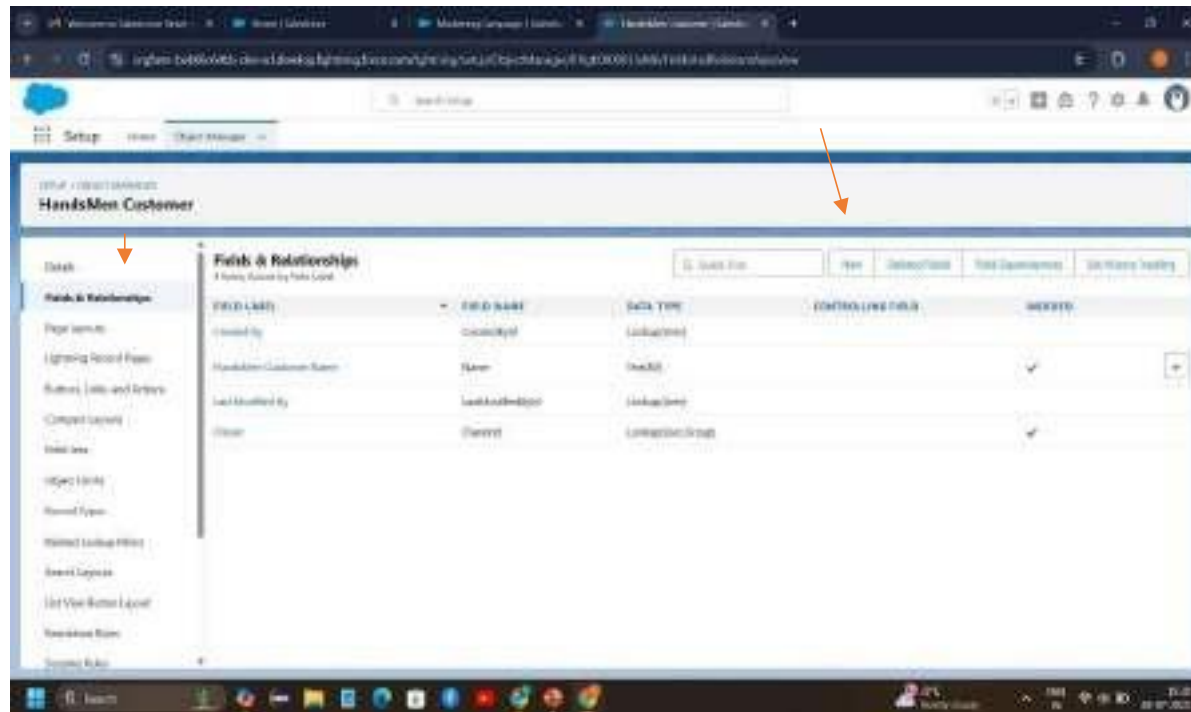
The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with the text "Hand" entered. Below the search bar, there's a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains three rows of data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandMen Customer	HandMen_Customer__c	Custom Object		7/28/2025	✓
HandMen Order	HandMen_Order__c	Custom Object		7/28/2025	✓
HandMen Product	HandMen_Product__c	Custom Object		7/28/2025	✓

At the bottom of the screen, there's a Windows taskbar with various application icons and a system tray showing the date and time.

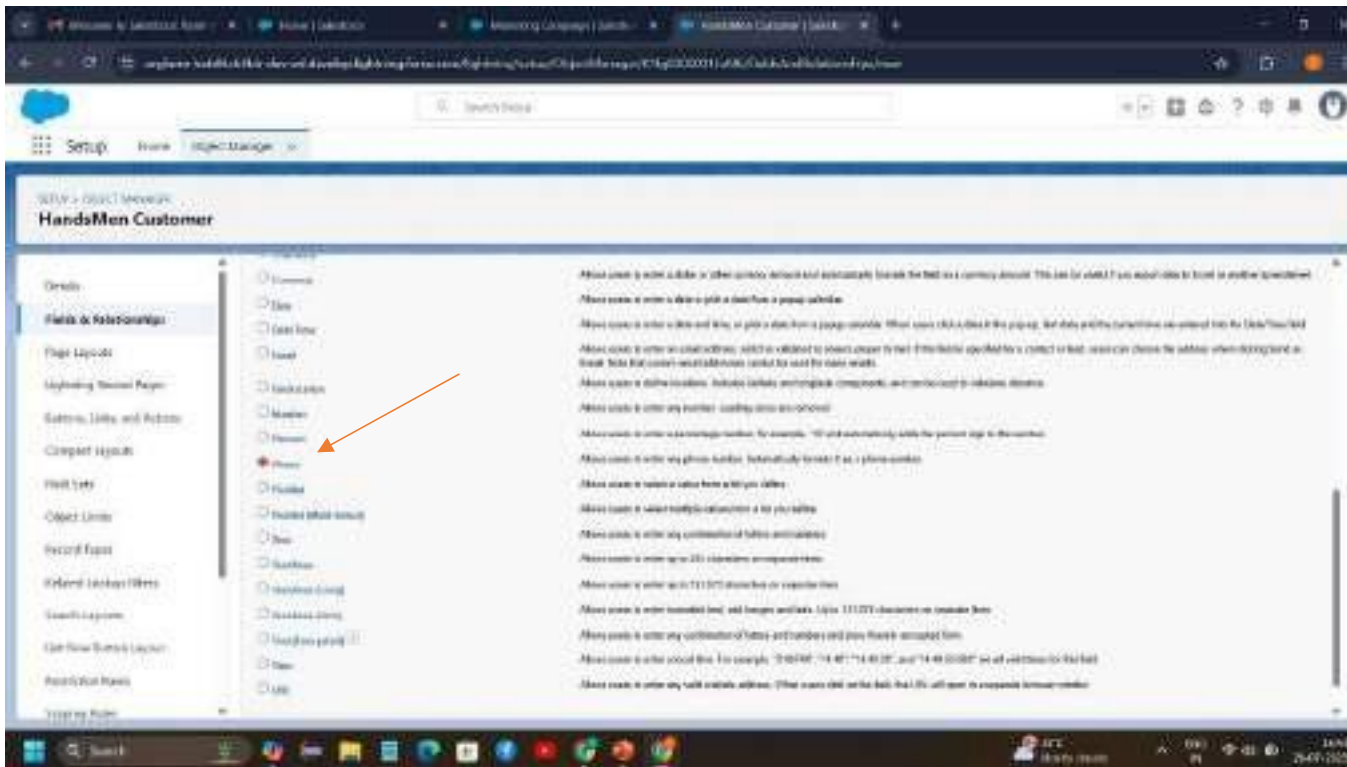
Fill the above as following:
Field Label: Email
Field Name : gets auto generated

Now click on “Fields & Relationships” → New
Click on Next → Next → Save and new.

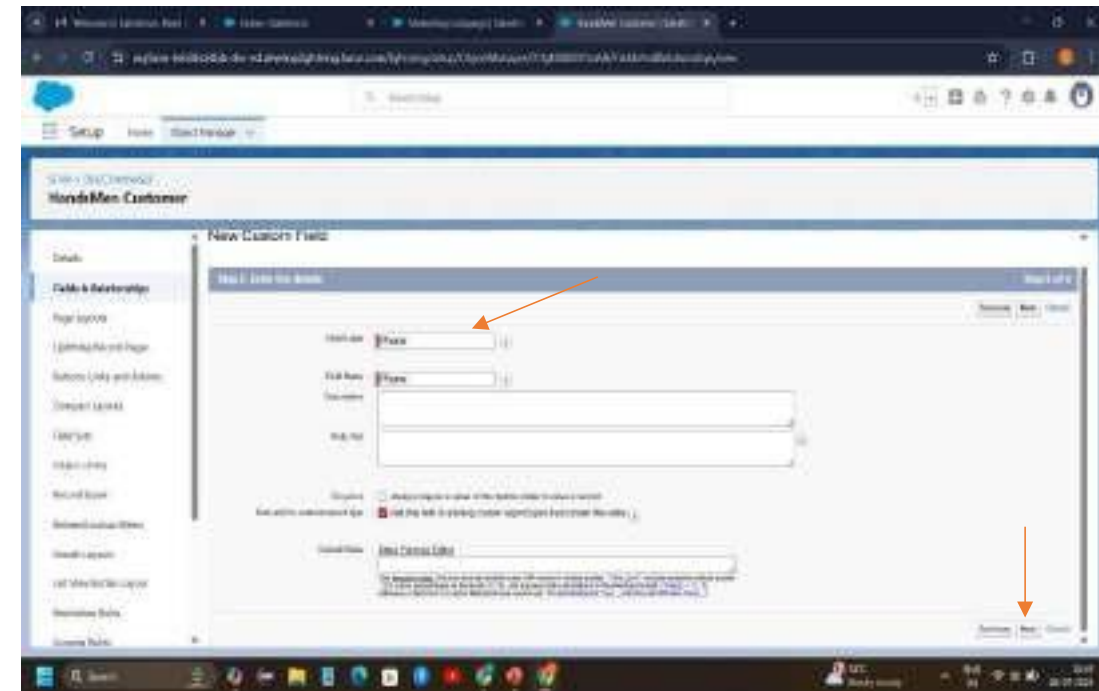


Creating Phone on HandsMen Customer Object

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.

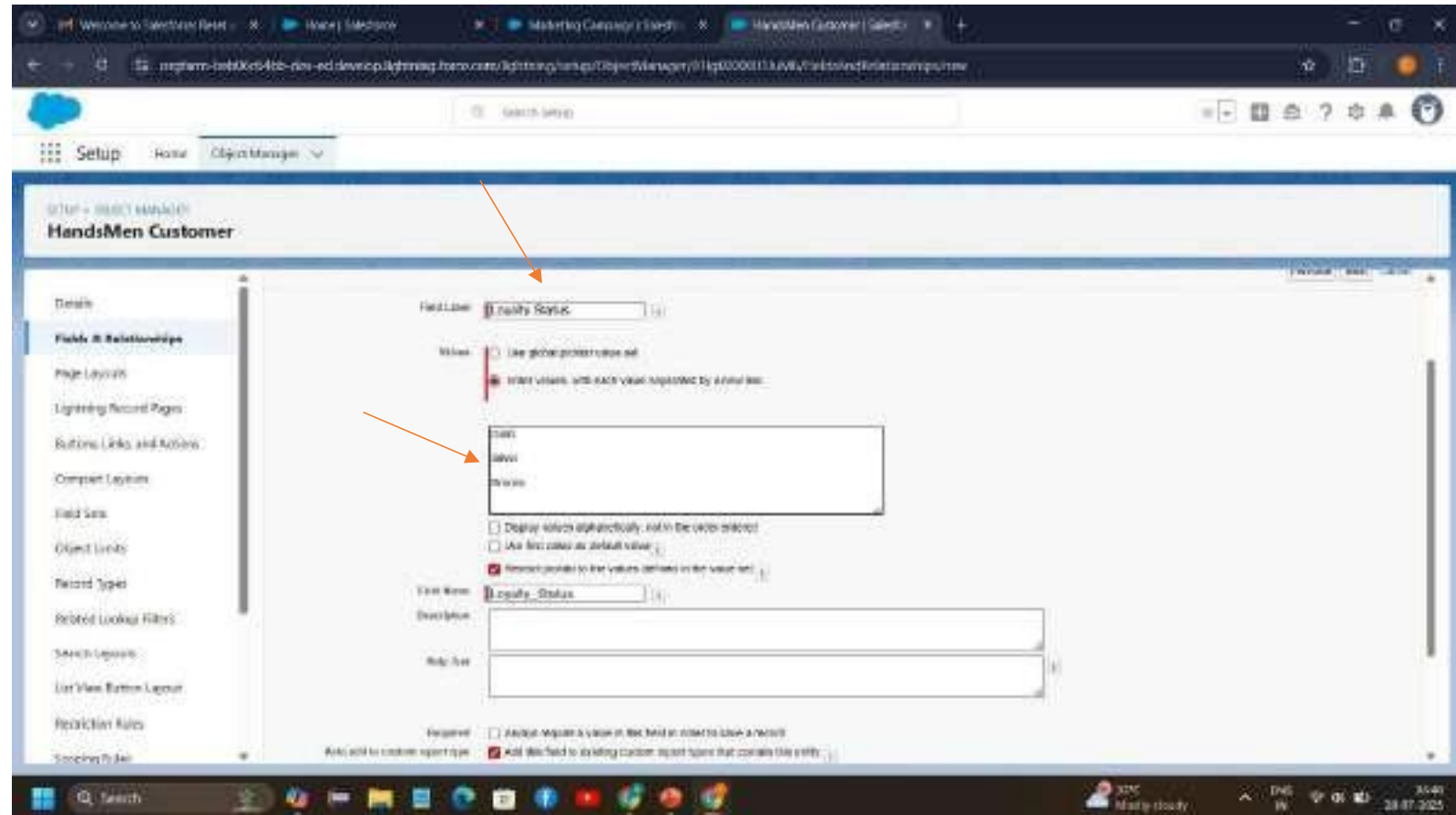
Now click on “Fields & Relationships” → New.

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



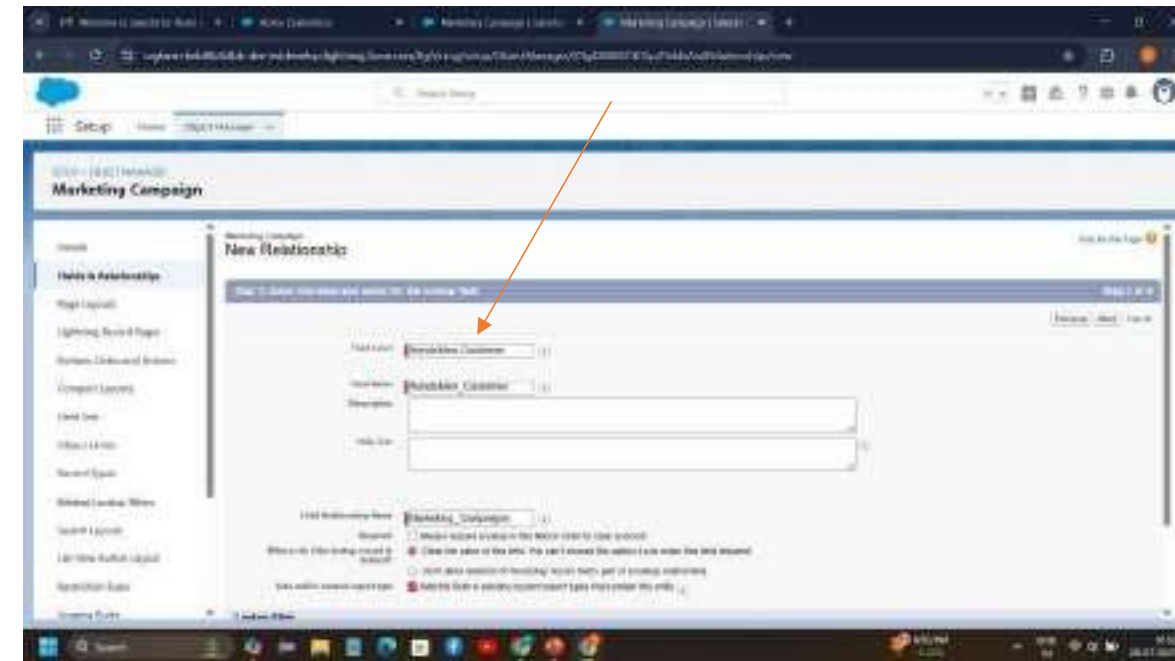
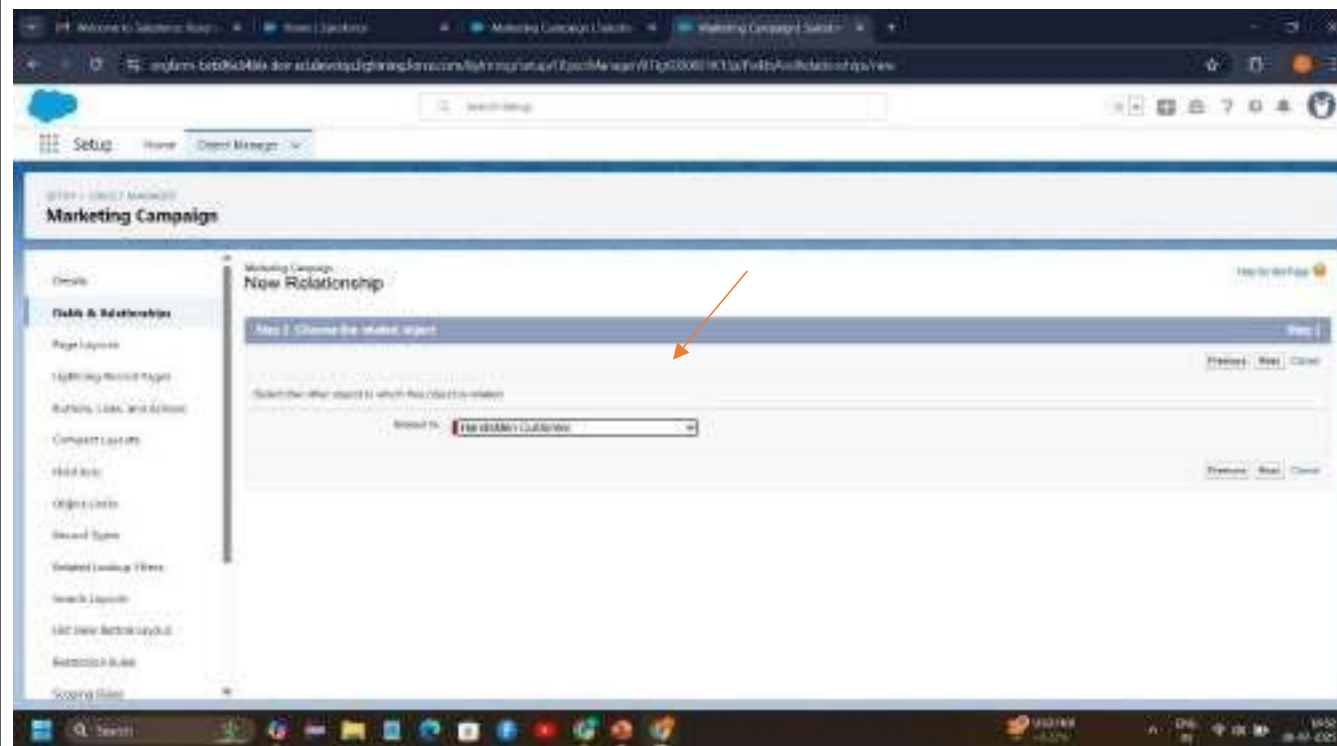
Unit 1 : Creating Lookup Relationship between Marketing Campaign and HandsSome Customer

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.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Users', 'Record Types', 'Related Lookup Fields', 'Search Layouts', 'List View Button Layouts', 'Record Rules', and 'Sharing Rules'. The main content area is titled 'HandsMen Product' and 'New Relationship'. It shows the 'Step 3: Enter the label and name for the lookup field' wizard. The 'Field Label' is 'HandsMen Order', the 'Field Name' is 'HandsMen_Order', and the 'Lookup Field' is 'HandsMen_Products'. The 'Required' checkbox is checked. The 'Add this field to related custom report types that contain this entity' checkbox is also checked. The 'Lookup Filter' section is visible at the bottom.

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.

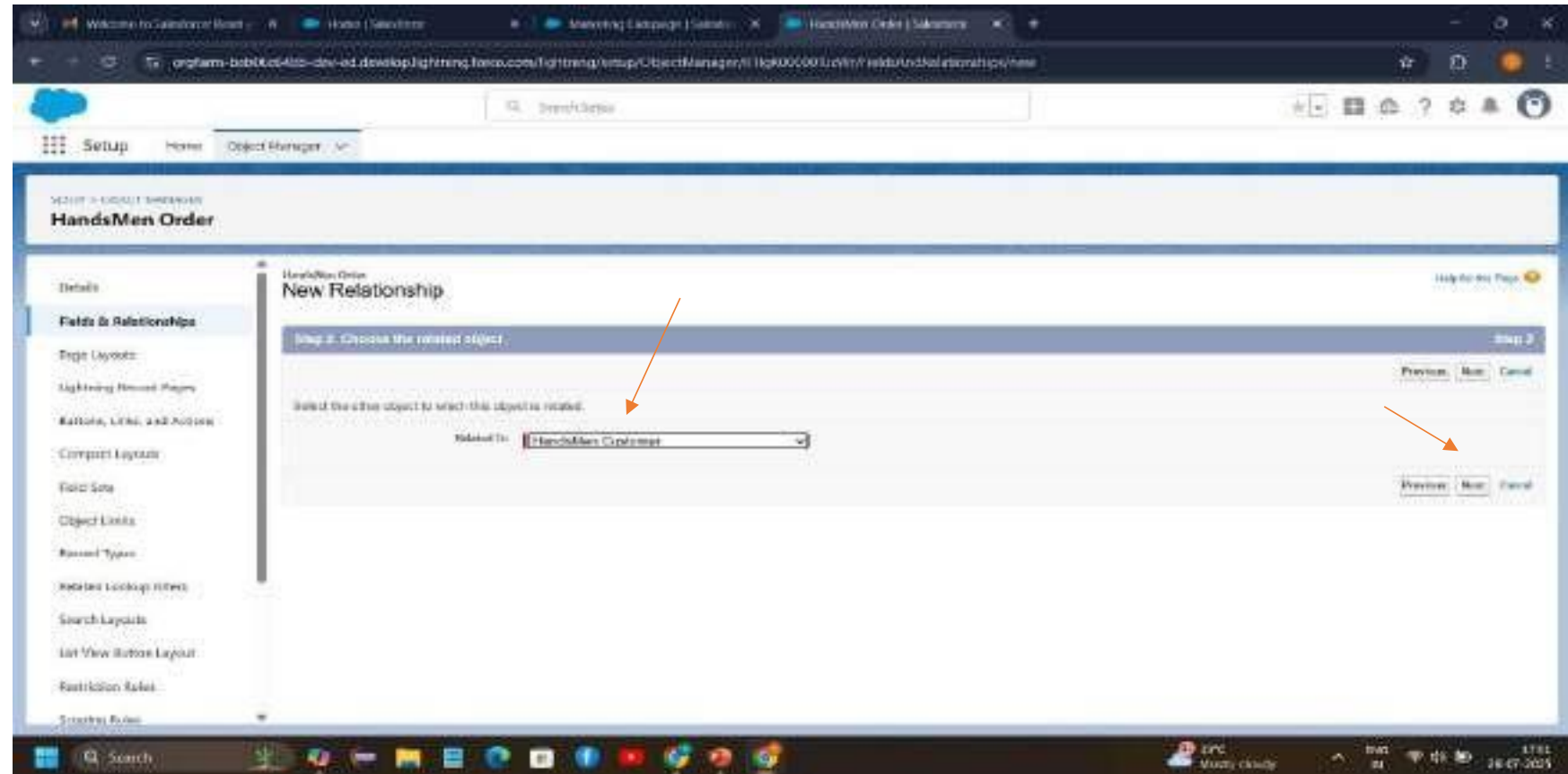
Click on fields & relationship → click on New.

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.

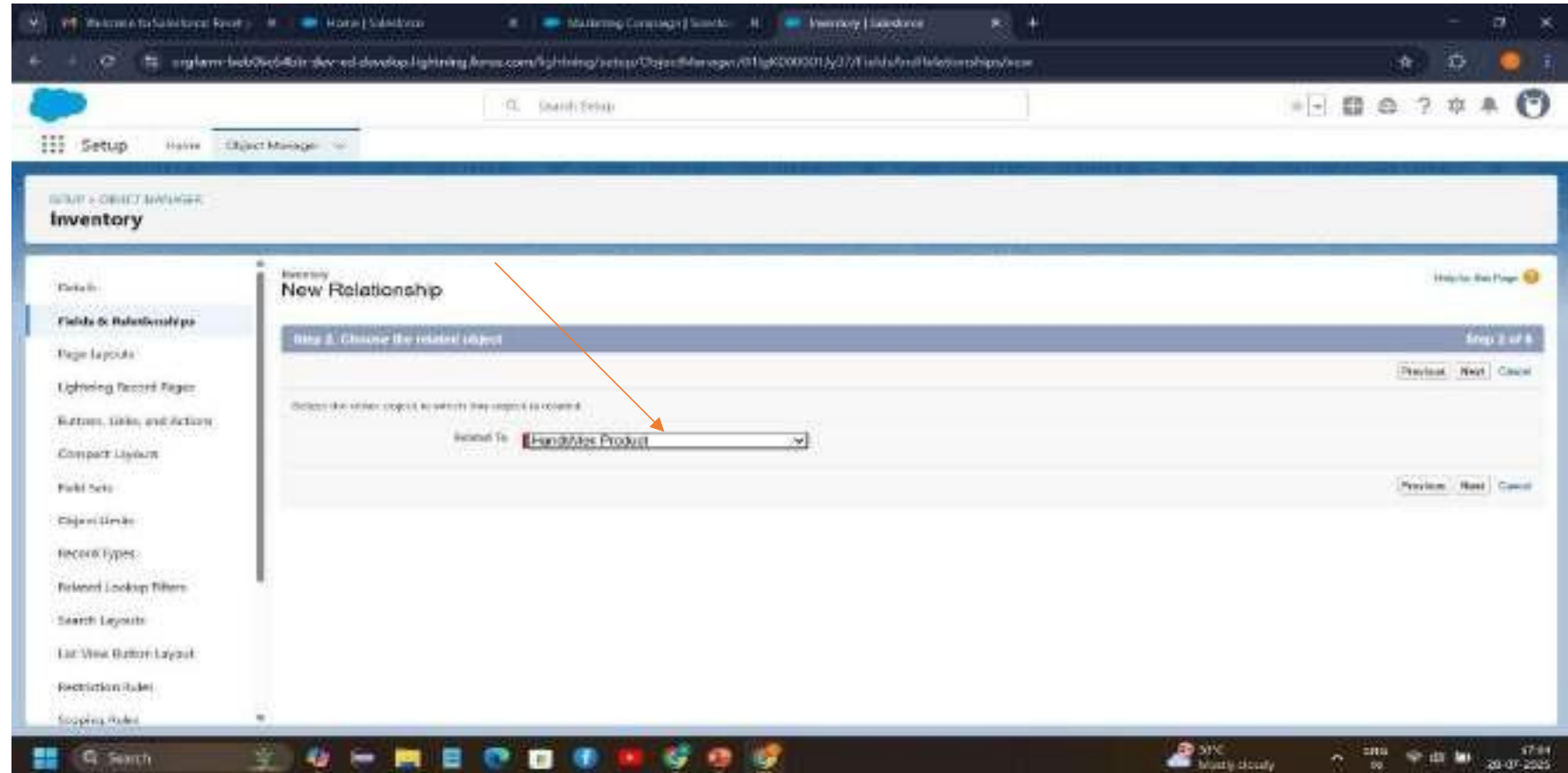
Click on fields & relationship → click on New.

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.

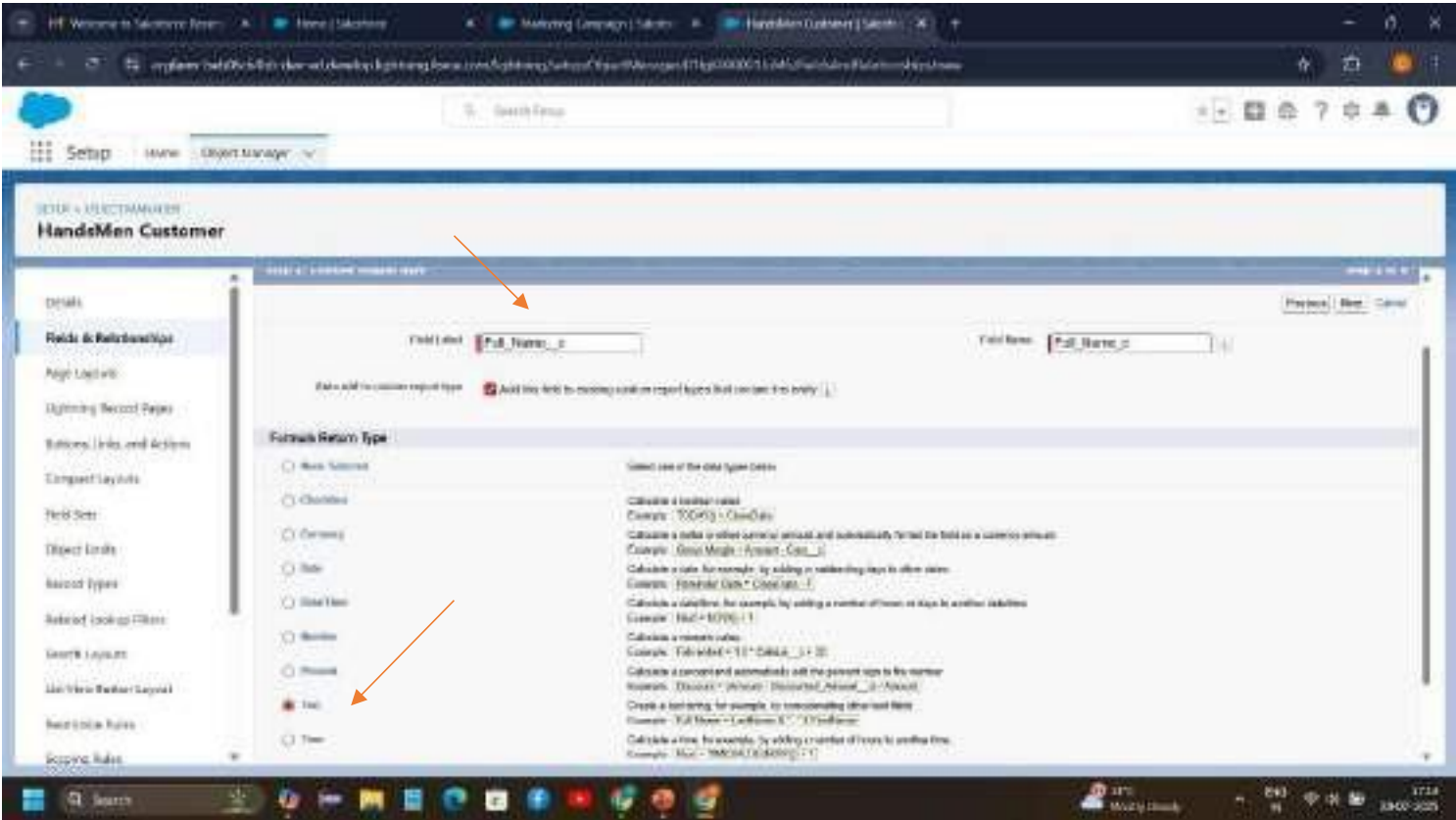
Next → Next → Save.



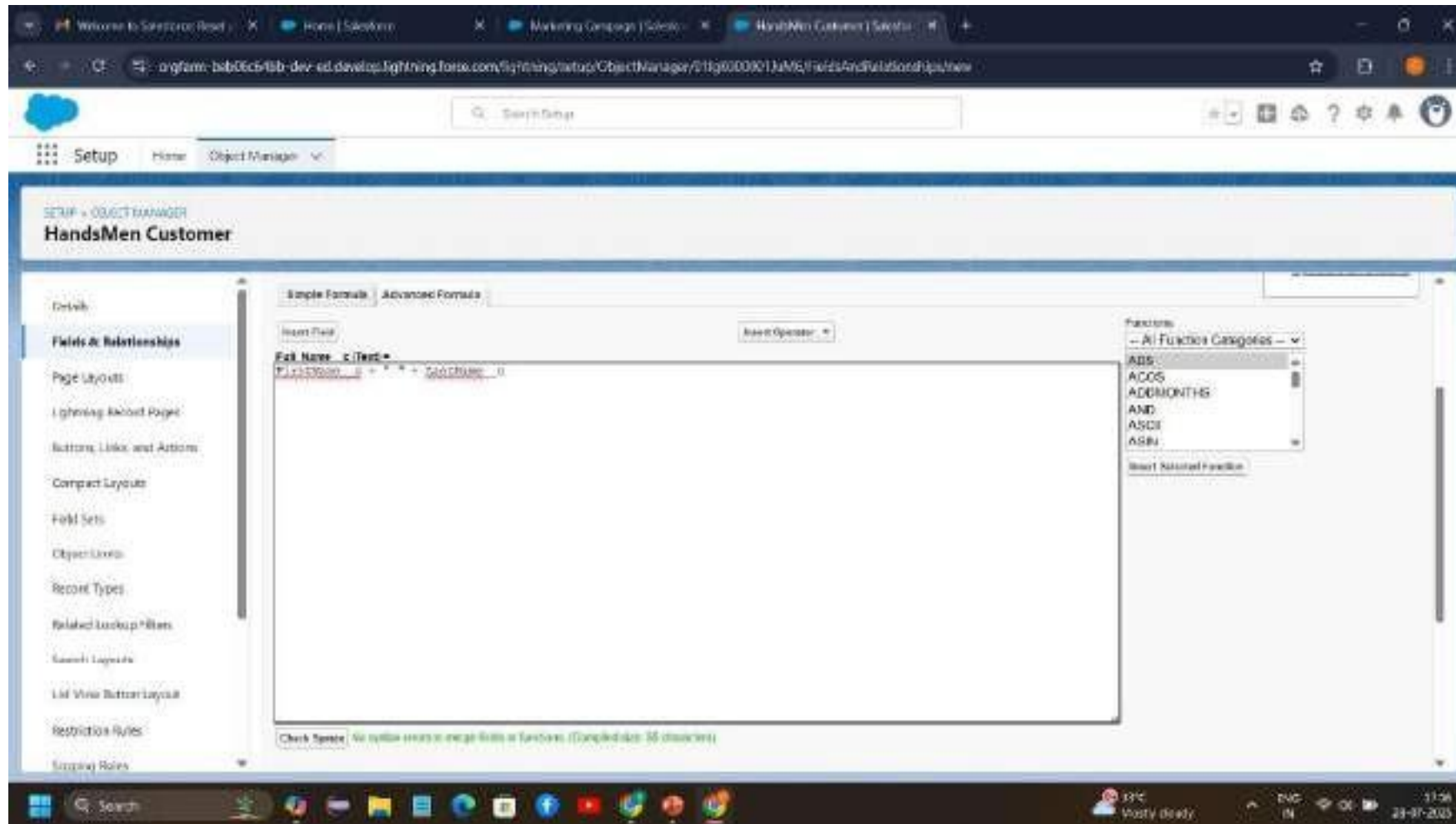
Formula Fields

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.



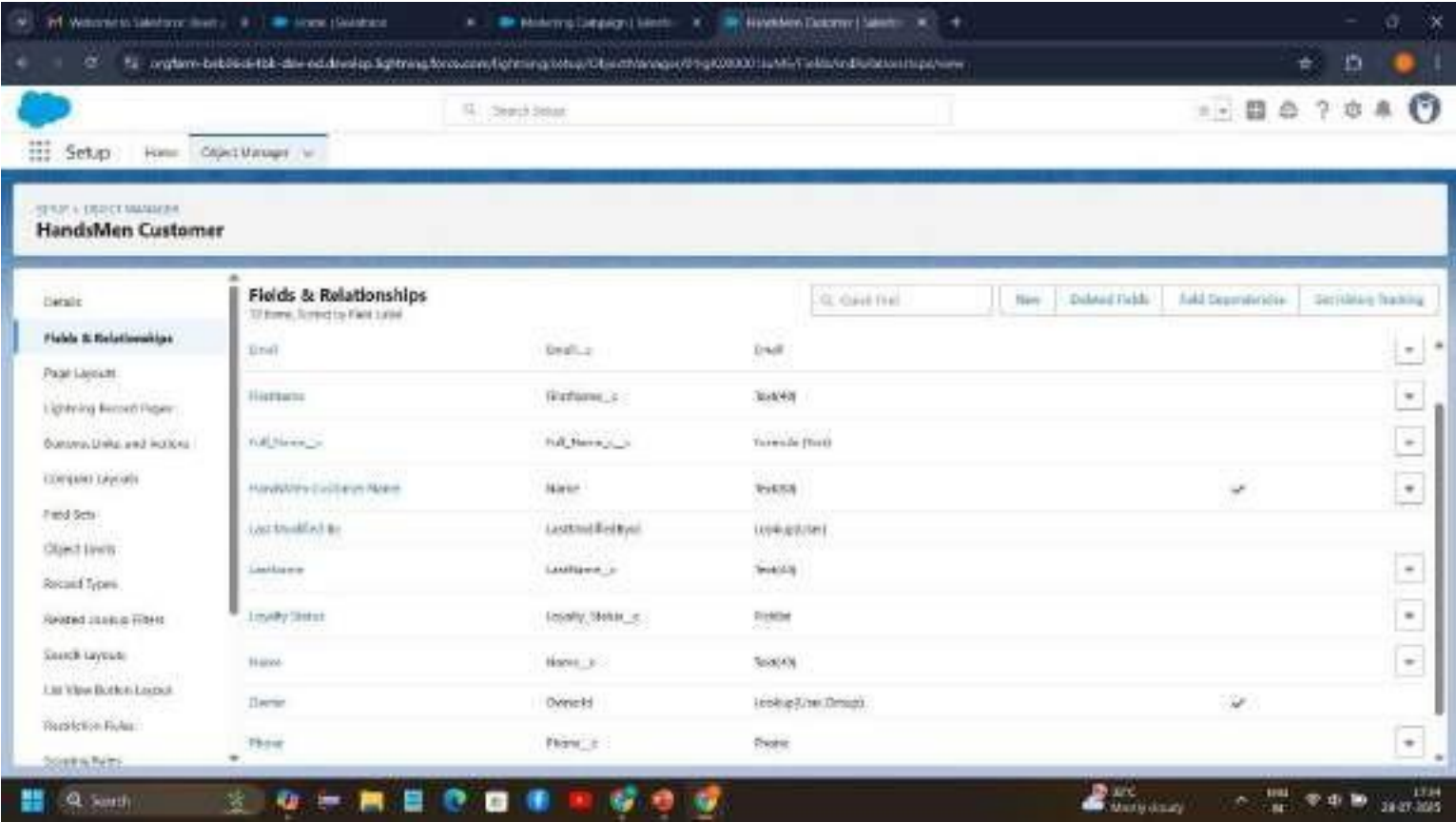
Object Name: HandsMen Customer__c **Type:** Custom object

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,

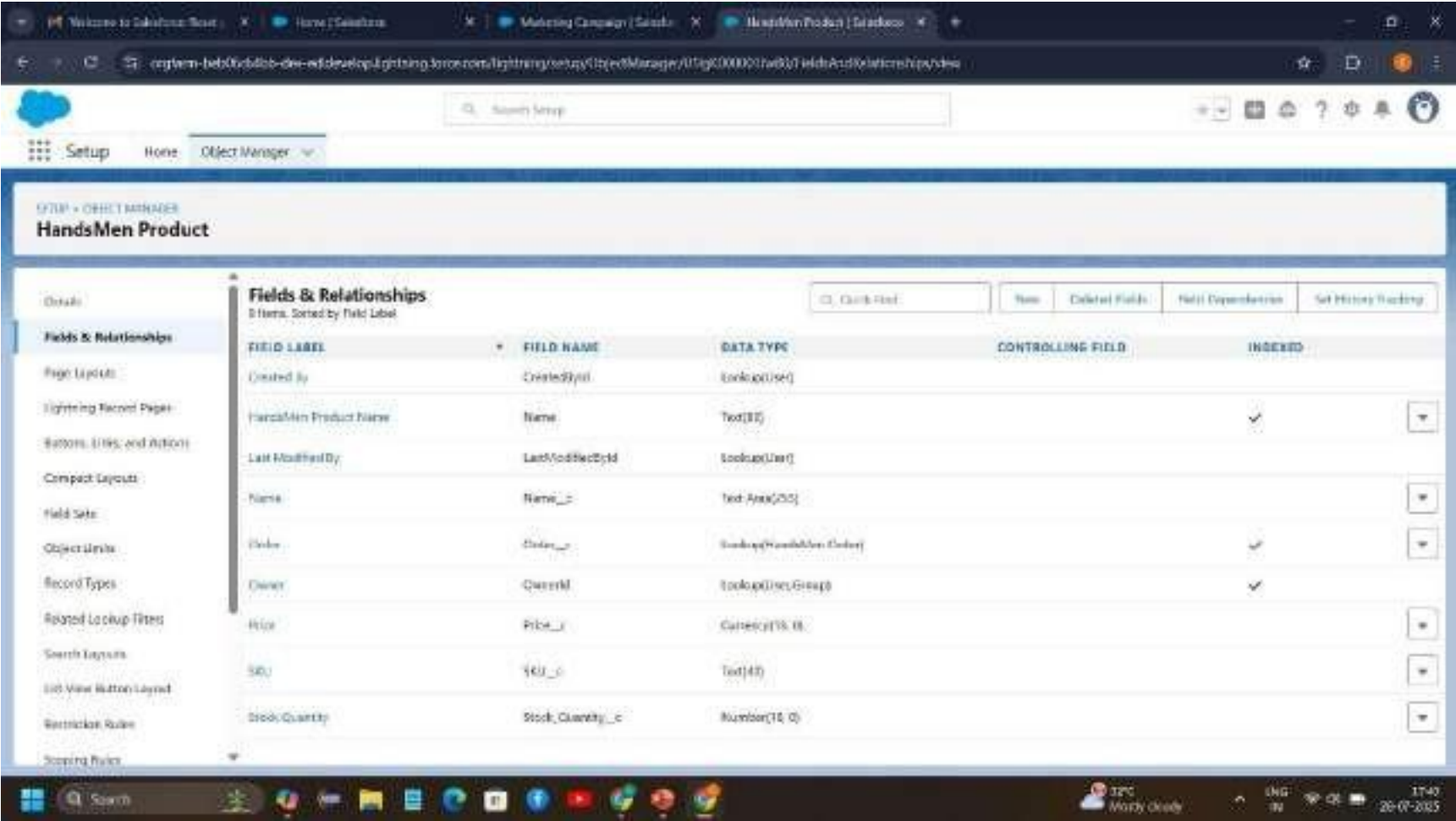


Total_Purchases__c (Number)

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)

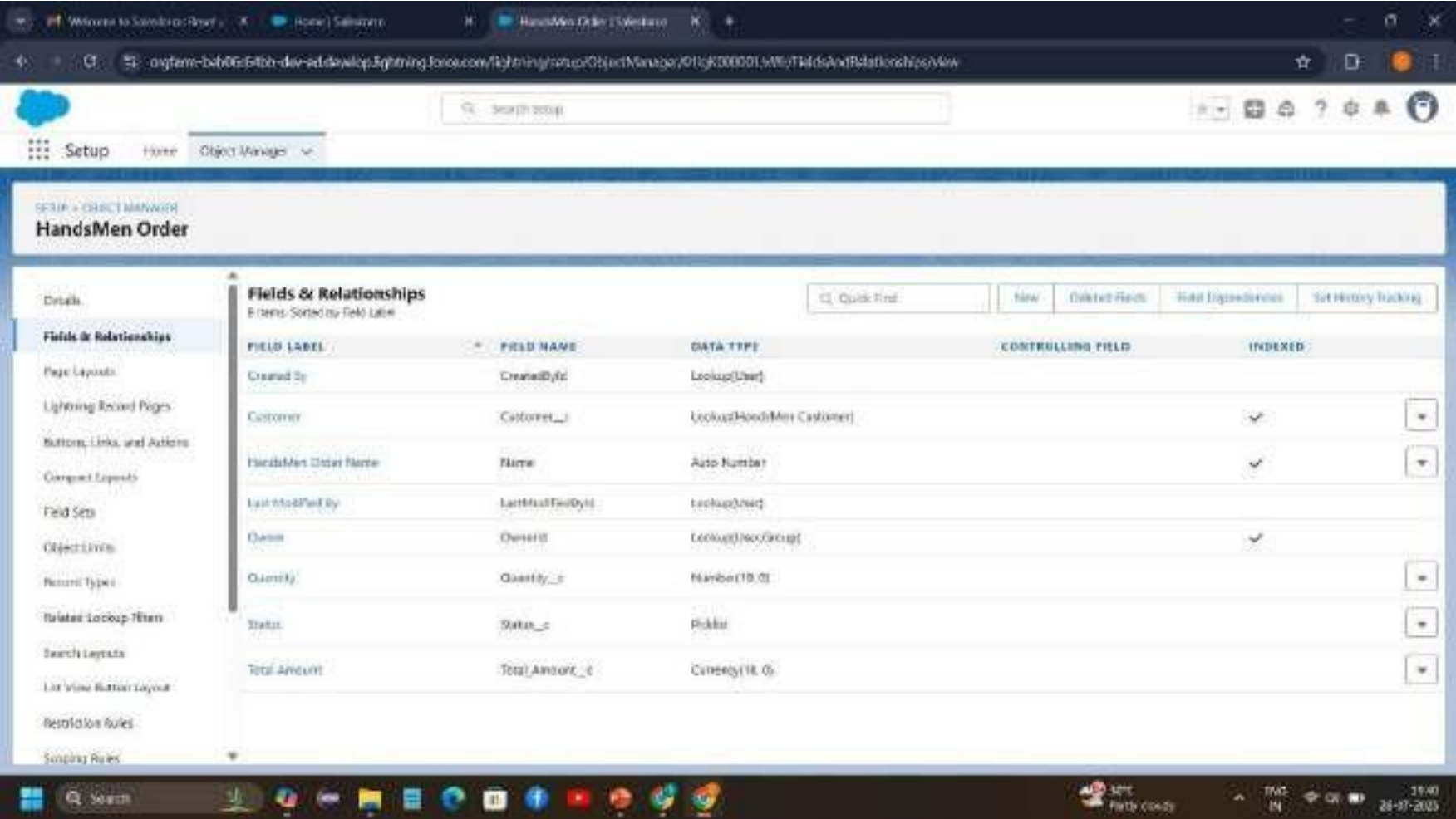


Object Name: HandsMen Order__c **Type:** Custom Object

Description: Stores customer orders

Key Fields: Order_Number (Record Name),
Status (Picklist: Pending, Confirmed, Rejection),

Quantity__c (Number),
Total_Amount__c(Number)



The screenshot shows the Salesforce Lightning interface for the 'HandsMen Order' custom object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Links, Record Types, Related Lookup Fields, Search Layouts, List View Button Layout, Rollup Rules, and Sharing Rules. The main content area is titled 'HandsMen Order' and includes a 'Fields & Relationships' section with a 'Fields Sorted by Field Label' filter. A table lists the fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields listed are Created By, Customer, HandsMen Order Name, Last Modified By, Owner, Quantity, Status, and Total Amount.

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

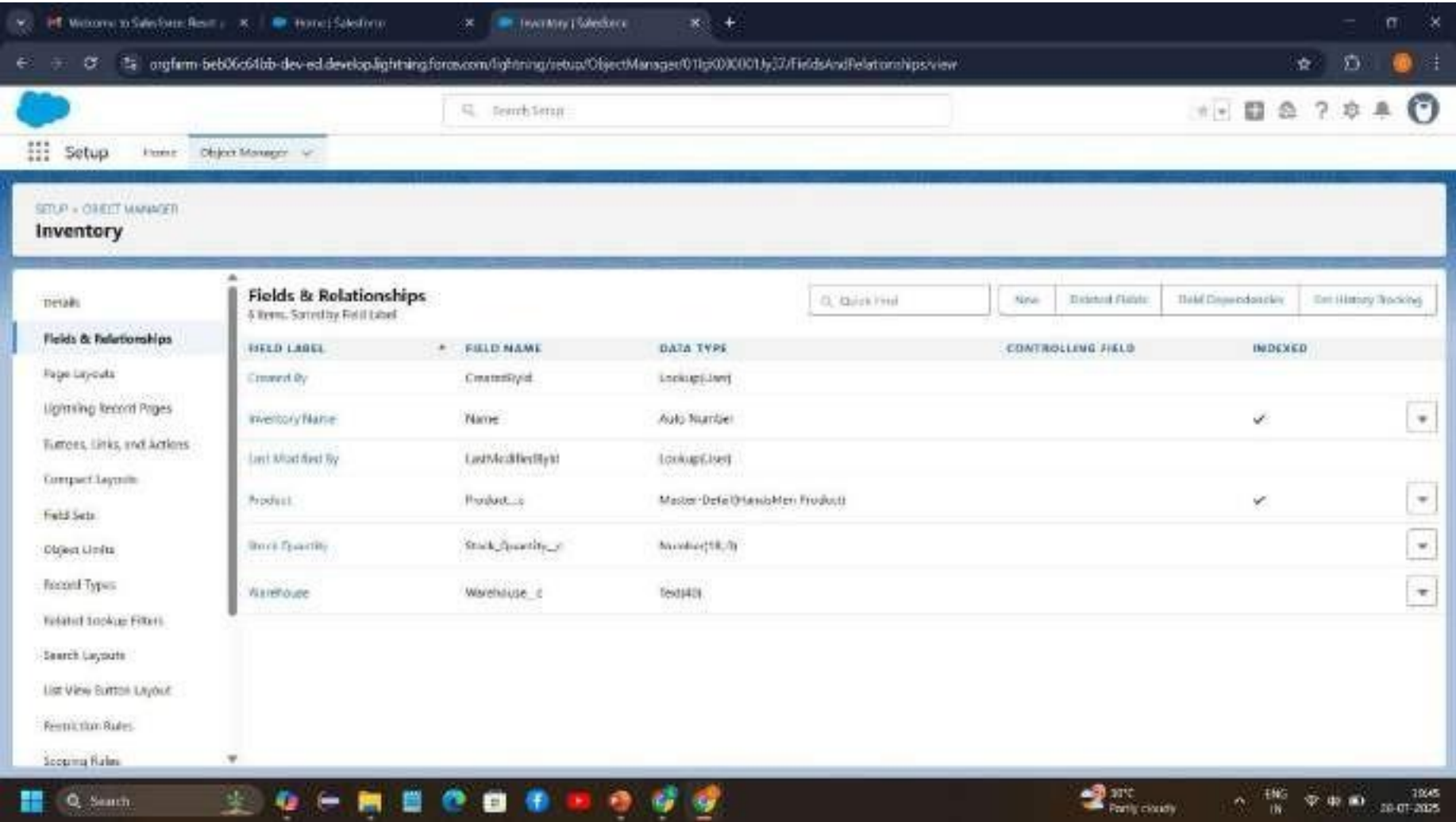
Object Name: Inventory__c **Type:** Custom Object

Description: Tracks inventory levels

Key Fields: Auto Number (Record Name),

Warehouse (Text),

Stock_Quantity__c (Number)



Object Name: Marketing_Campaign__c

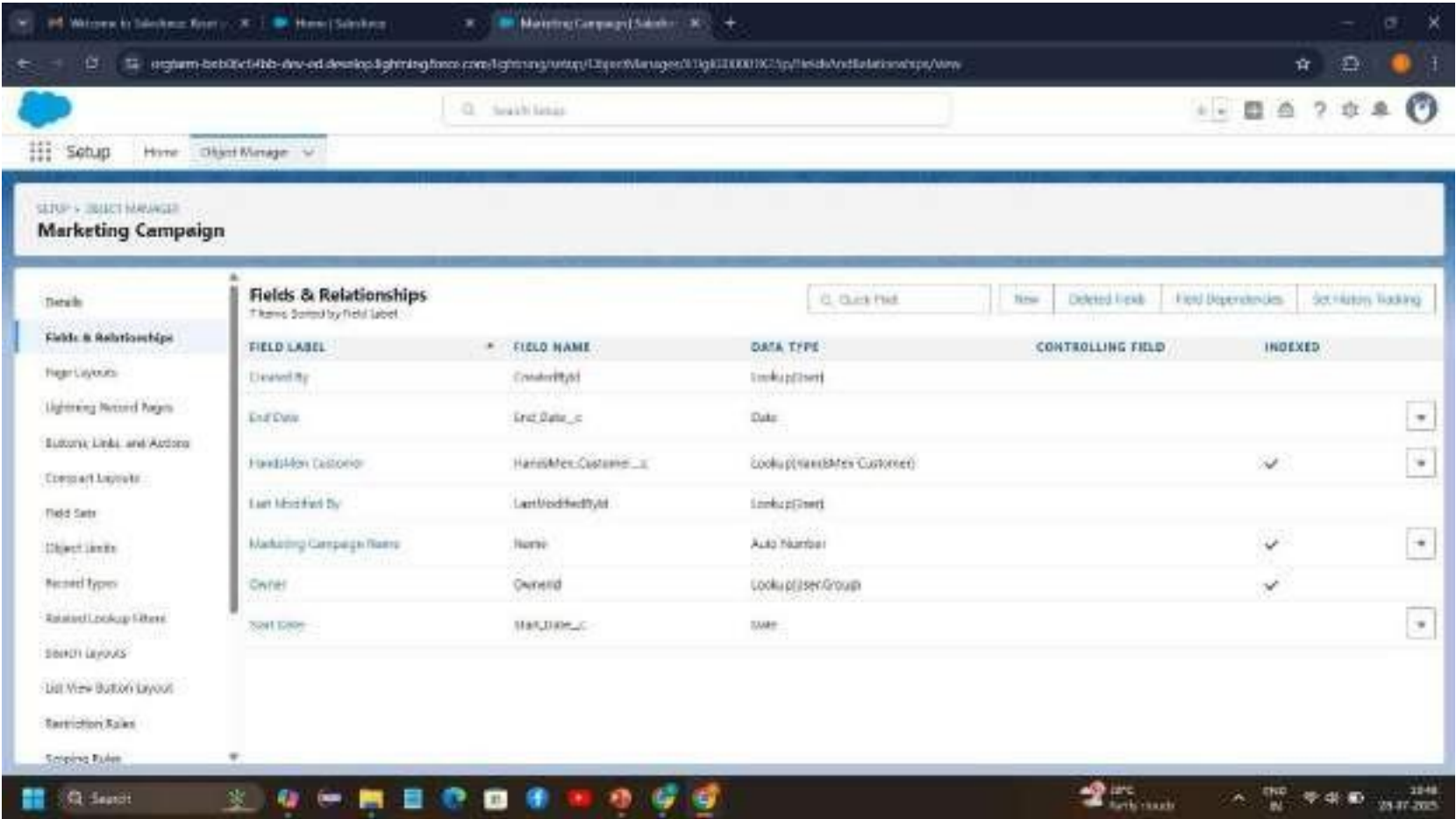
Type: Custom Object

Description: Manages promotions & campaigns

Key Fields:Campaign_Name (Record Name),

Start_Date (Date),

End_Date (Date)



The screenshot shows the Salesforce 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 Layouts, Restriction Rules, and Trigger 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, Handled By Customer, Last Modified By, Marketing Campaign Name, Owner, and Sort Order. The 'Marketing Campaign Name' field is marked as the Controlling Field and Indexed. The 'Owner' field is also indexed. The 'Sort Order' field is of type Integer.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup (User)		
End Date	End Date__c	Date		
Handled By Customer	HandledByCustomer__c	Lookup (HandledByCustomer)		
Last Modified By	LastModifiedBy	Lookup (User)		
Marketing Campaign Name	Name	Auto Number	Yes	Yes
Owner	OwnerId	Lookup (User Group)		Yes
Sort Order	SortOrder__c	Integer		

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.

HandsMen Order (Solidforce)

mgfame-b6b0c6fbb-d9e-ed4develop.lightning.force.com/lightning/setup/ObjectManager/01tgs0000010W0VW0orderRulesview

Setup | Home | Object Manager

HandMen Order

COMPACT LAYOUT

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Rule Promoting

Validation Rules

0 items. Sort by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
No items to display				

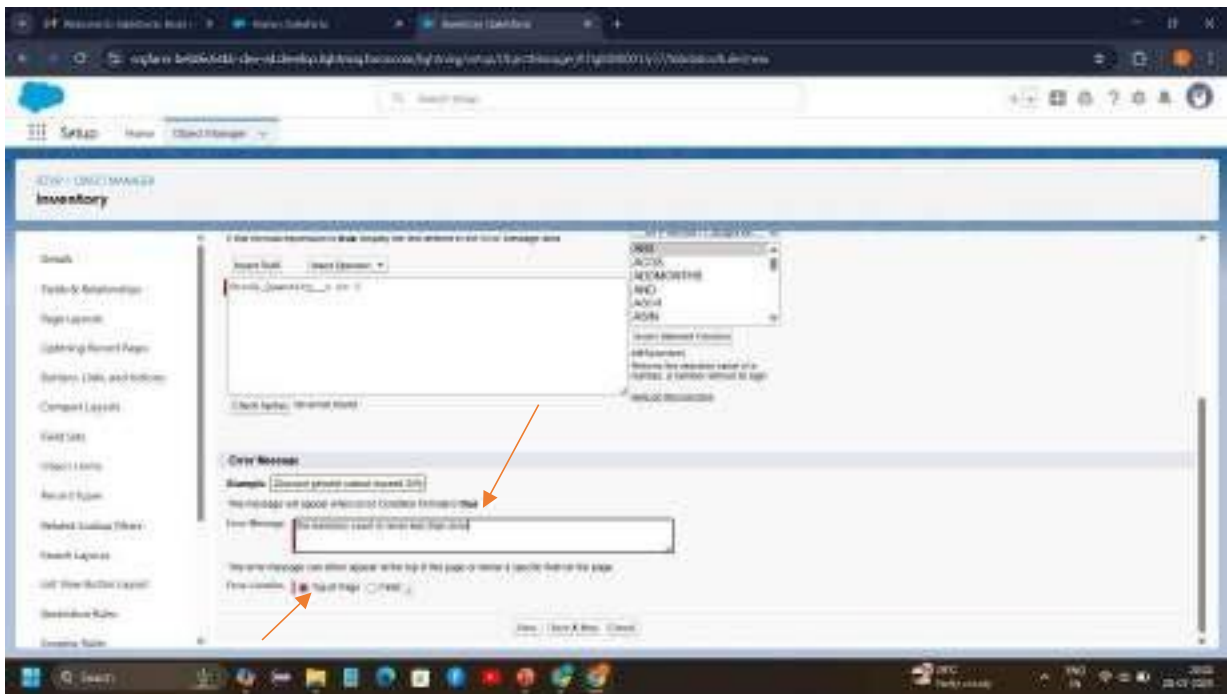
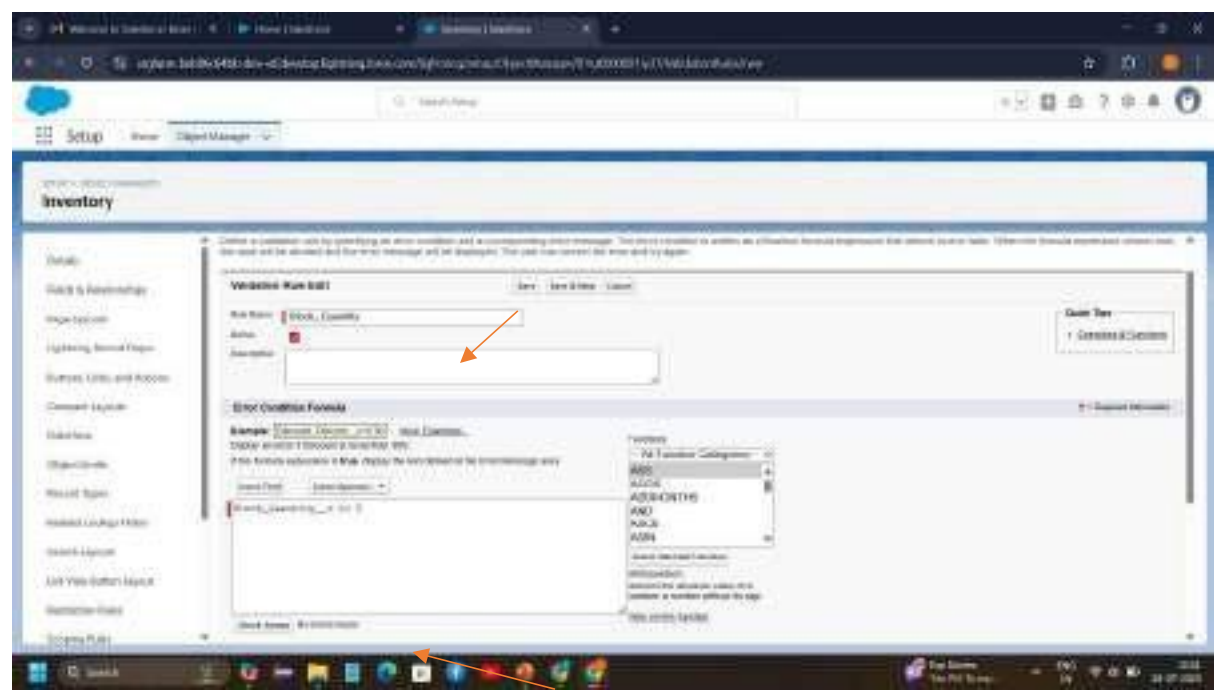
New

Windows taskbar: Search, taskbar icons, system tray with date 20-07-2025 and time 09:54.

Create One more Validation rule for Inventory object.

Enter Rule name as “Stock Quantity “.

Insert the Error Condition Formula as : - Stock_Quantity__c
≤ 0



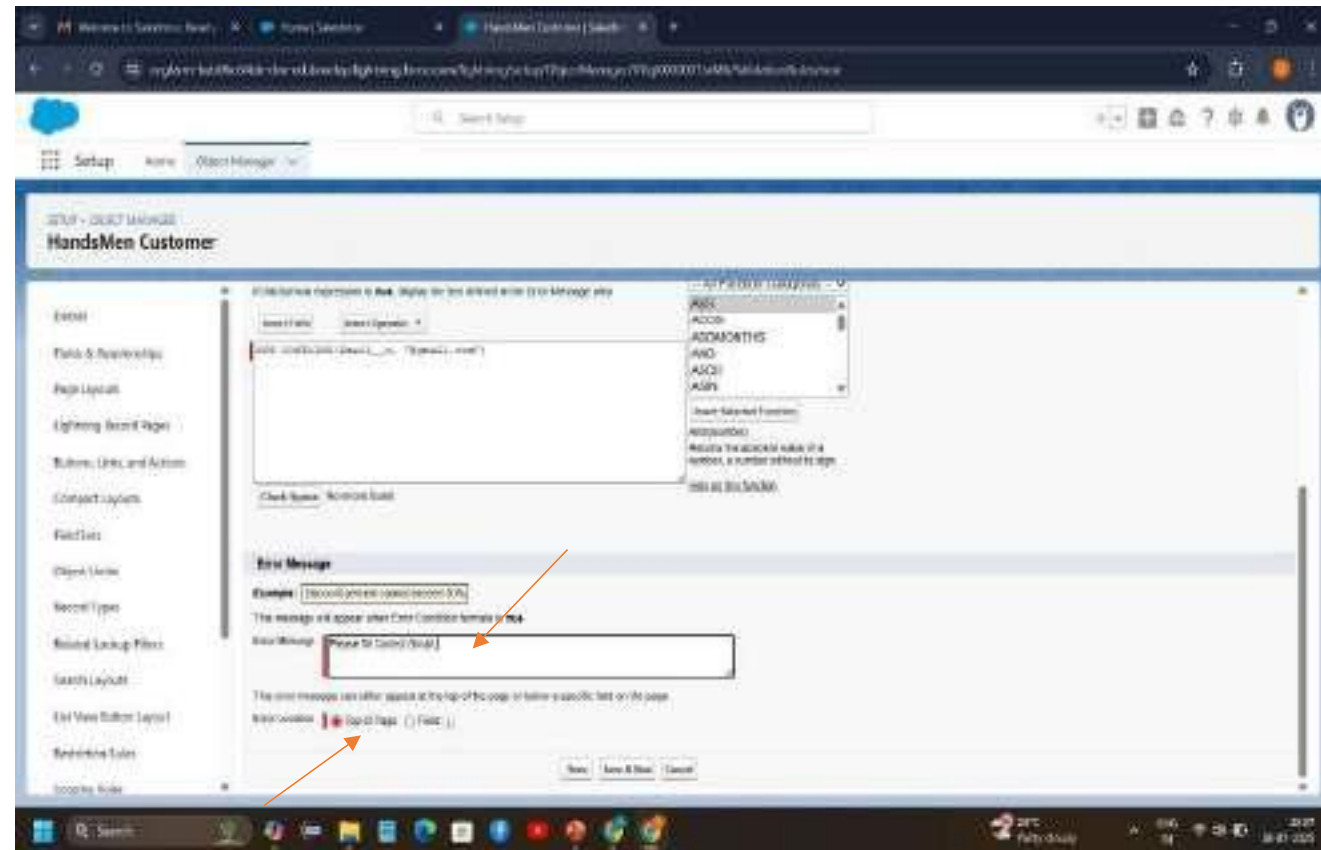
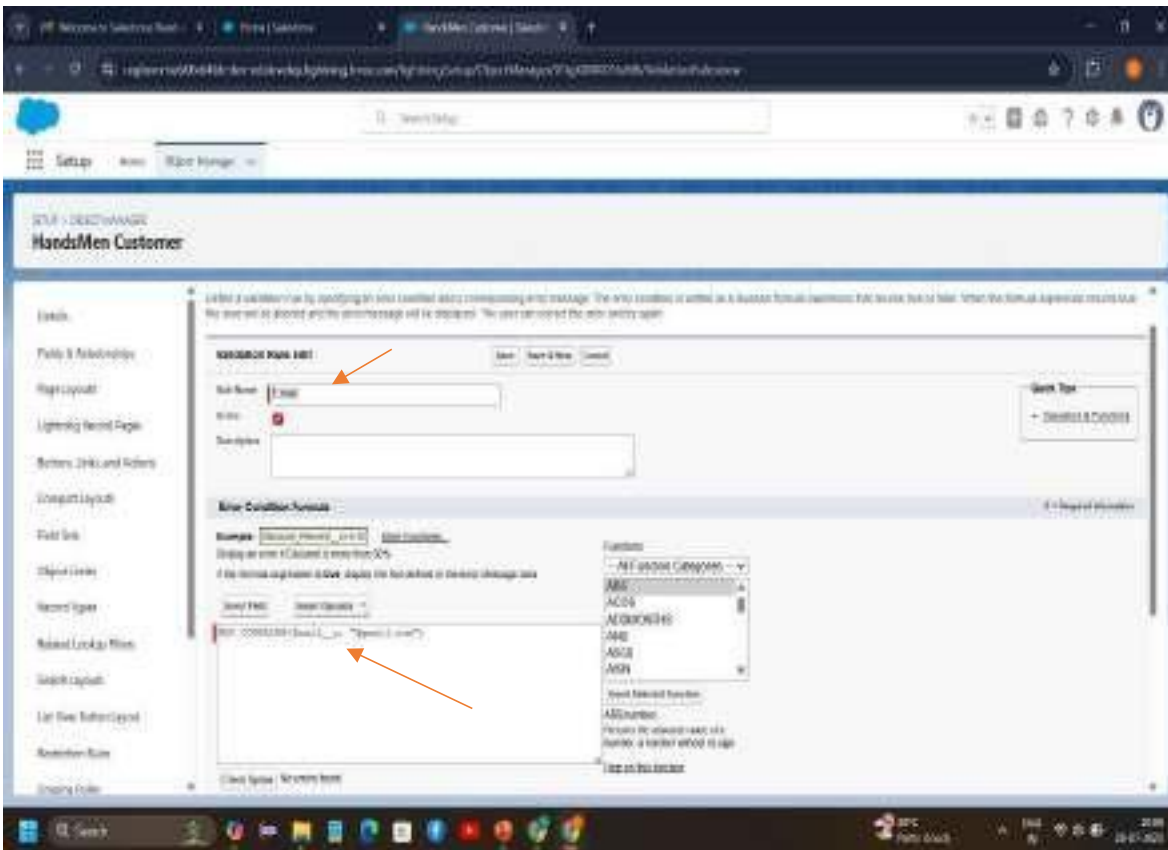
Enter the Error Message as “ the inventory count is never less than zero.”, select the Error location as Top of Page and click Save.

Create Validation rule for HandsMen Customer object.

Enter Rule name as "Email".

Insert the Error Condition Formula as :-

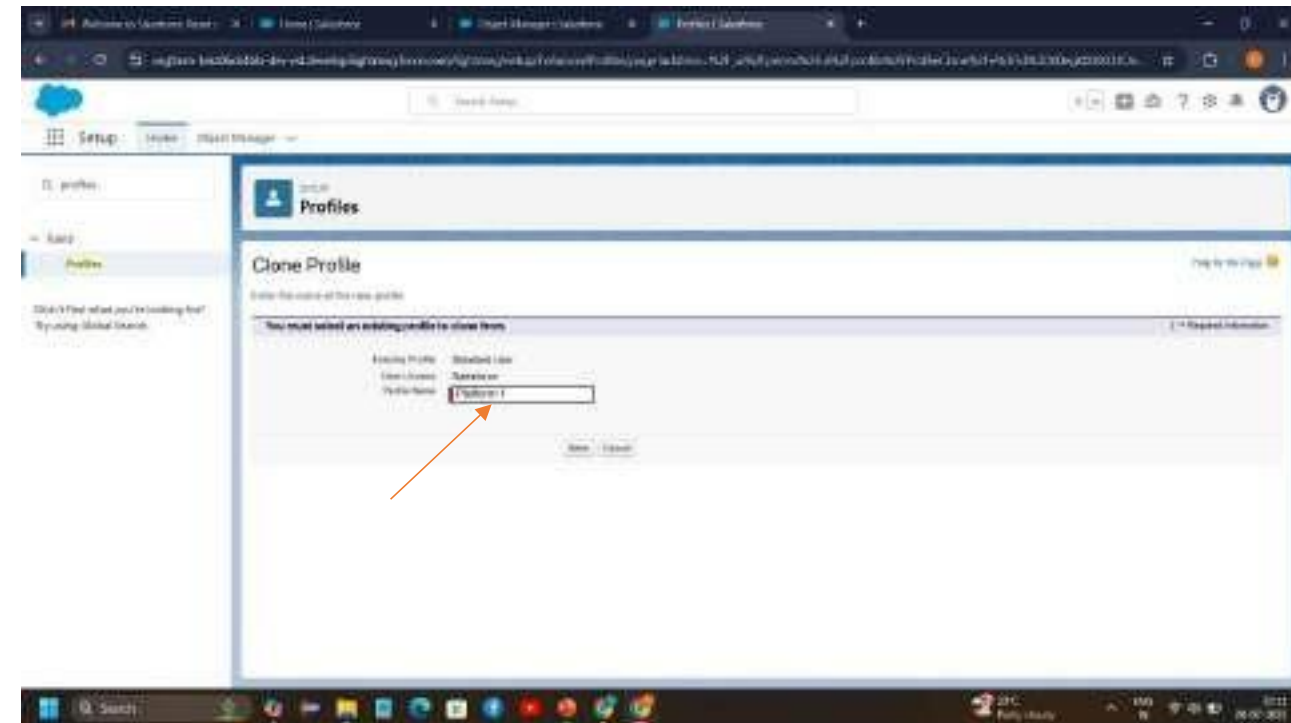
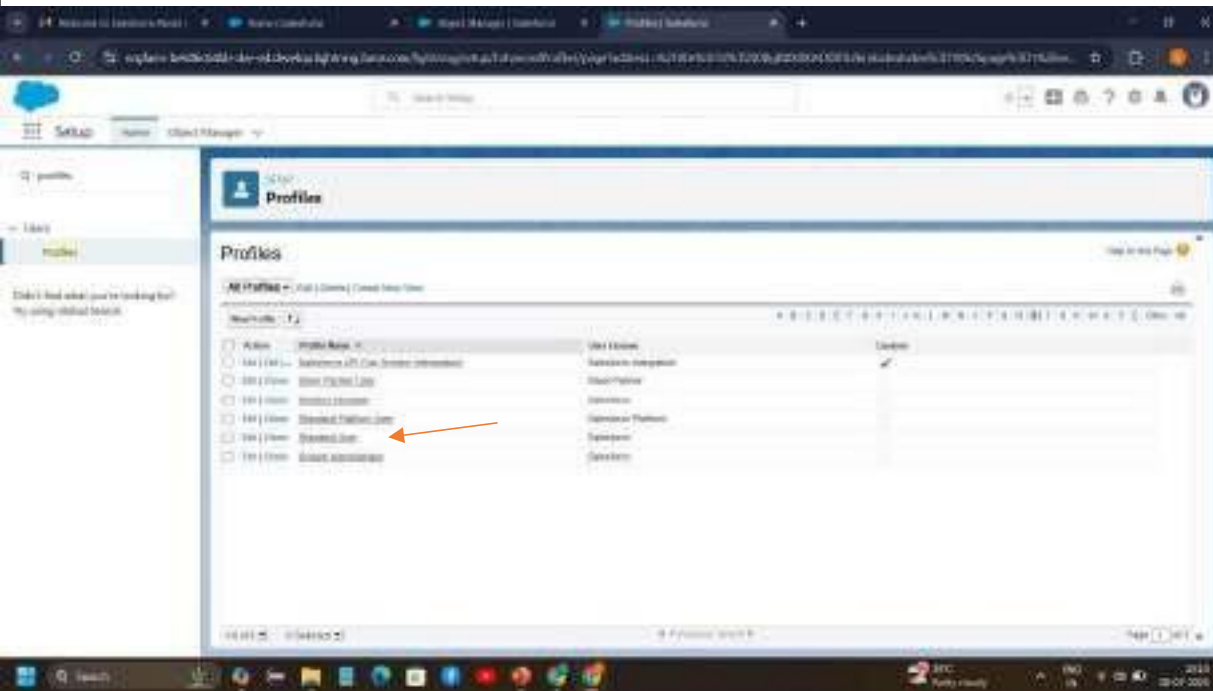
NOT CONTAINS(Email, "@[gmail.com](mailto:example@gmail.com)")



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.

Welcome to Salesforce Dev... | Home | Salesforce | Object Manager | Salesforce | Profile | Salesforce

orgfarm-bob06c4bb-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page/address=%2F00qK000003b53p%2Fv%3FretURL%3D%2F00qK000003b53p%2Fv%3Fsetup...

Setup

Home

Object Manager

profiles

Users

Profiles

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

SETUP

Profiles

Data Store Snowflake Connection

☐

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Data Store Targets

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Data Store Target Connection

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Data Store Target Definition

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Data Store Target Definition Mgmt

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Work Plans

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Work Plan Templates

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Work Step Templates

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Work Types

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Work Type Groups

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Custom Object Permissions

	Basic Actions				User Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Reschedule Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reschedule Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reschedule Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

How passwords expire in: 90 days

Remember password history: 3 passwords remembered

	Basic Actions				User Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Inventory	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Search

25°C
Partly cloudy

ENG
IN

20:15
28-07-2025

Data Security - Roles

Role - Sales

Welcome to Salesforce: Reset | Roles | Salesforce | Object Manager | Salesforce | Roles | Salesforce

oqlame-b606c4bb-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

Setup Home Object Manager

roles

Users

Roles

Profile 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

Understanding Roles

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

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

Executive Staff

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

Western Sales Director

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

Eastern Sales Director

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

International Sales Director

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

Western Sales Rep

- QA Sales Rep, QA Sales Rep

Eastern Sales Rep

- NY Sales Rep, NJ Sales Rep

International Sales Rep

- Asian Sales Rep, European Sales Rep

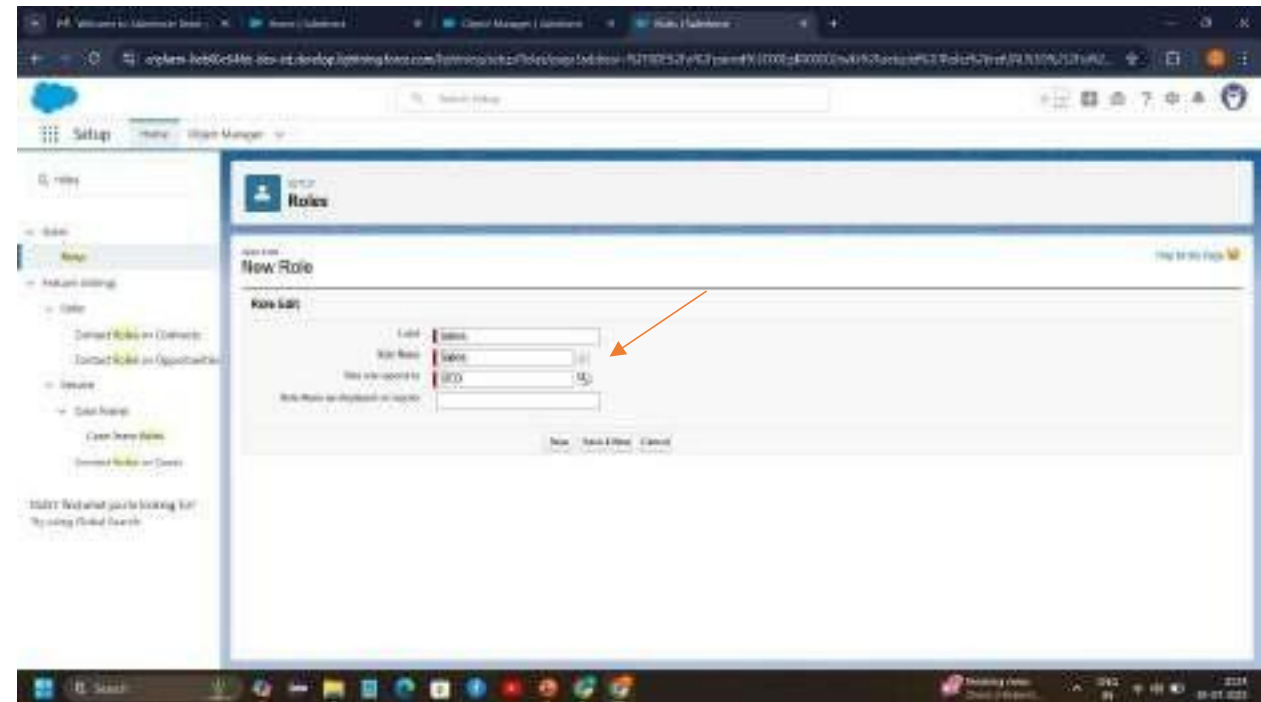
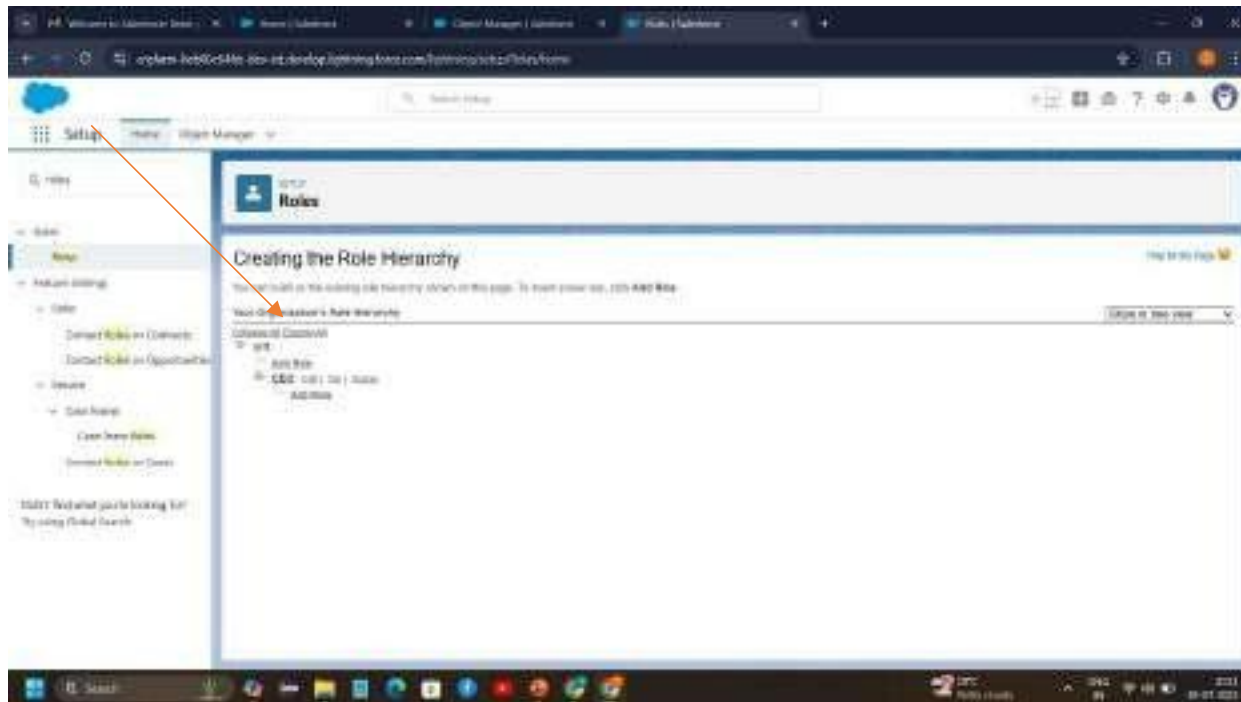
Set Up Roles

☐ Don't show this page again

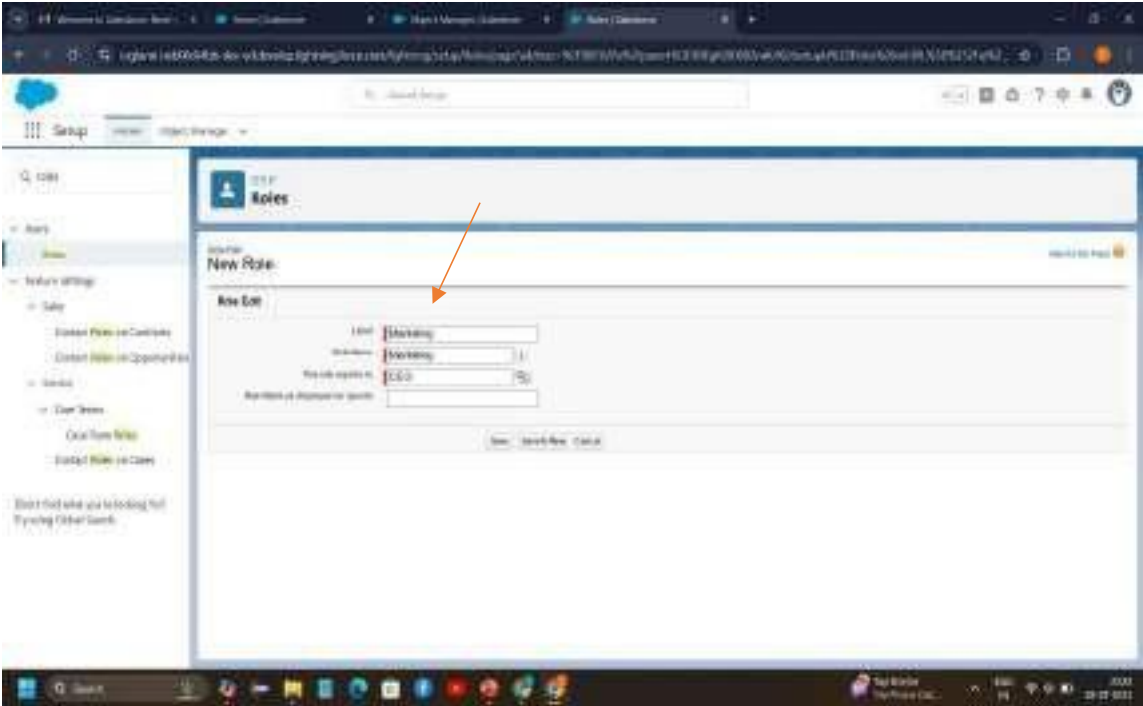
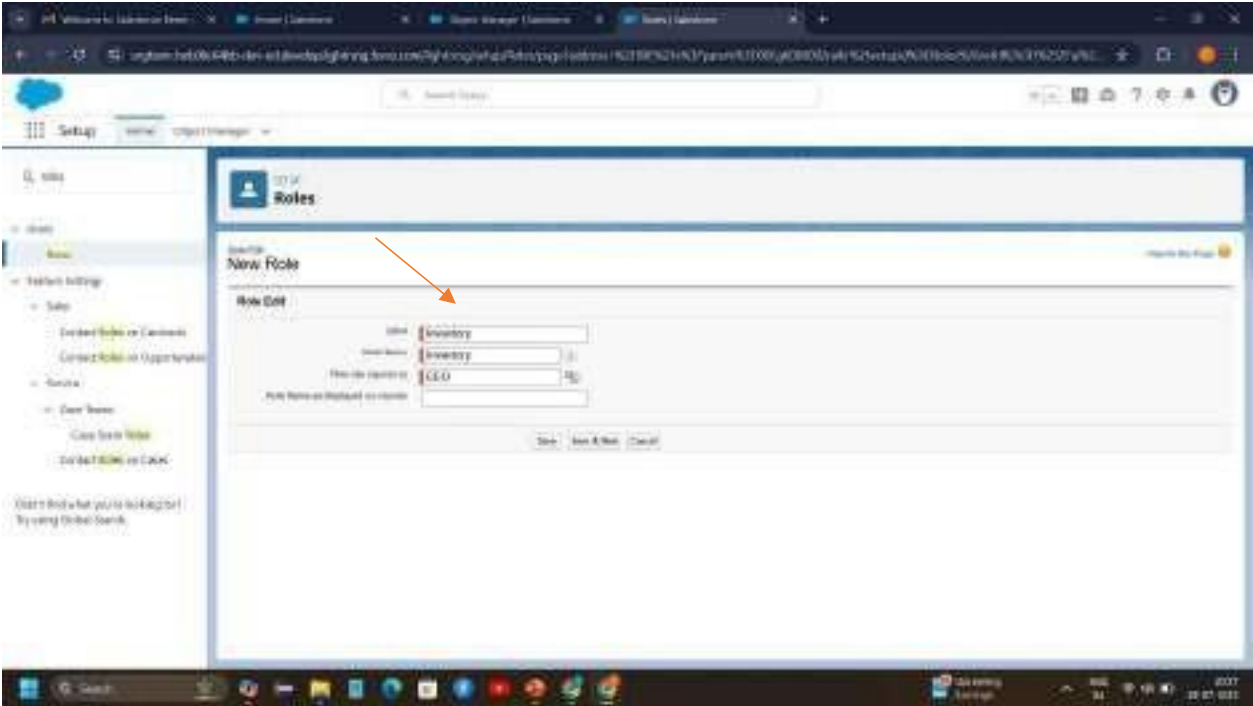
Creating Sales Manager Role:

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





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

Compress All Expand All



Add Role

CEO Edit | Del | Assign

Add Role

CEO Edit | Del | Assign

Add Role

COO Edit | Del | Assign

Add Role

Inventory Edit | Del | Assign

Add Role

Marketing Edit | Del | Assign

Add Role

Sales Edit | Del | Assign

Add Role

SVP, Customer Service & Support Edit | Del | Assign

Add Role

Customer Support, International Edit | Del | Assign

Add Role

Customer Support, North America Edit | Del | Assign

Add Role

Installation & Repair Services Edit | Del | Assign

Add Role

SVP, Human Resources Edit | Del | Assign

Add Role

SVP, Sales & Marketing Edit | Del | Assign

Data Security - Users

User - Niklaus

Create User

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

Fill in the fields

First Name : Niklaus

Last Name : Mikaelson

Alias : Give an Alias Name

Email id : Give your Personal Email id

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

Nick Name : Give a Nickname

Role : Sales

User license : Salesforce Platform

Profiles : Platform 1

The screenshot shows the Microsoft Entra ID 'Users' page. The left sidebar has 'Users' selected. The main content area shows the 'Edit' form for user 'Niklaus Mikaelson'. The 'General information' tab is active. The 'Email' field is highlighted with an orange arrow. The 'Email' field contains the text 'niklausm@orga.bymai.com'. Other fields include 'First Name' (Niklaus), 'Last Name' (Mikaelson), 'Title', 'Company', 'Department', and 'Phone'. The 'Role' dropdown is set to 'Sales'. The 'Groups' section shows 'Global Administrator' and 'Global Reader'.

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

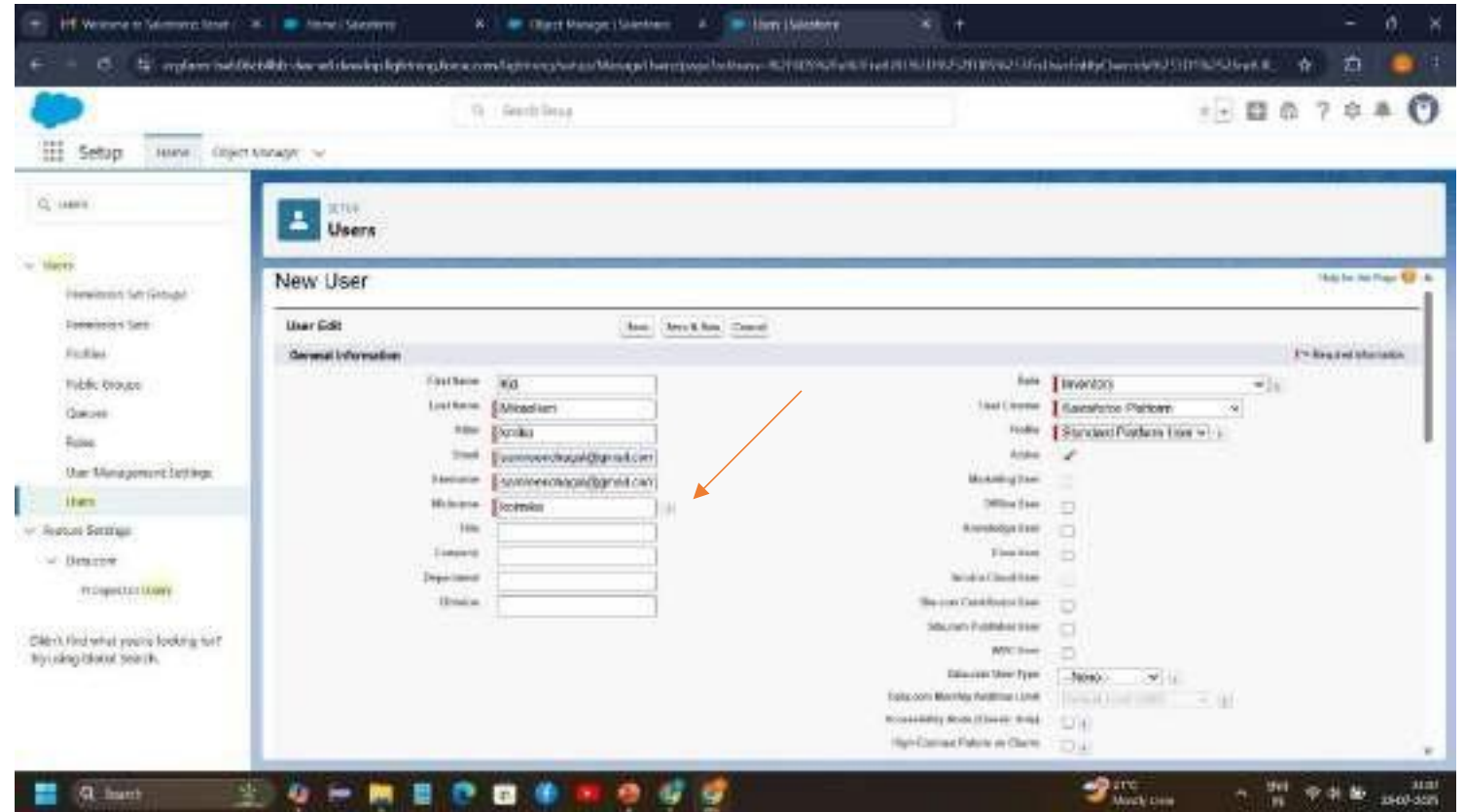
Username : Username should be in this form: text@text.text

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

Setup Home Object Manager

Search Setup

Q perm

Permission Set Groups
Permission Sets
Custom Code
Custom Permissions

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

Permission Sets

On this page, you can create, view, and manage permission sets.

ALL Permission Sets Edit Create New View

New

Action	Permission Set Name	Description	License
<input type="checkbox"/>	Custom Data Cloud Data Service Toolkit	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Customer Data Platform
<input type="checkbox"/>	Custom Data Cloud Information Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Customer Data Platform
<input type="checkbox"/>	Custom Data Cloud Marketing Studio	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Customer Data Platform
<input type="checkbox"/>	Custom Data Cloud User	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Data Cloud
<input type="checkbox"/>	Custom Data Cloud for Marketing Data Access Restricted	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Custom Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Custom Data Cloud for Marketing Studio	This Data Cloud permission set will be deprecated in Spring '24. Learn...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Access to Service Default Agent	Gives users access to the default Agentforce agent in Salesforce.	Agentforce (Default)
<input type="checkbox"/>	Agent Platform Builder	Allows access to agent platform.	Agent platform builder
<input type="checkbox"/>	Agentforce Default Agent	Allows users to build and manage smart agents.	Agentforce (Default)
<input type="checkbox"/>	Agentforce Service Agent Configuration	Allows users to manage automatic AI service agents.	Agentforce Service Agent Builder
<input type="checkbox"/>	Agentforce Service Agent Object Access	Access knowledge articles and manage cases and contacts as an auto...	Agentforce Service Agent User
<input type="checkbox"/>	Agentforce Service Agent Service Role	Set up and use Agentforce Service Agent actions with extended data s...	Agentforce Service Agent User
<input type="checkbox"/>	Agentforce Service Agent User	Analyze historic and performance as an administrator. All service agent...	Agentforce Service Agent User

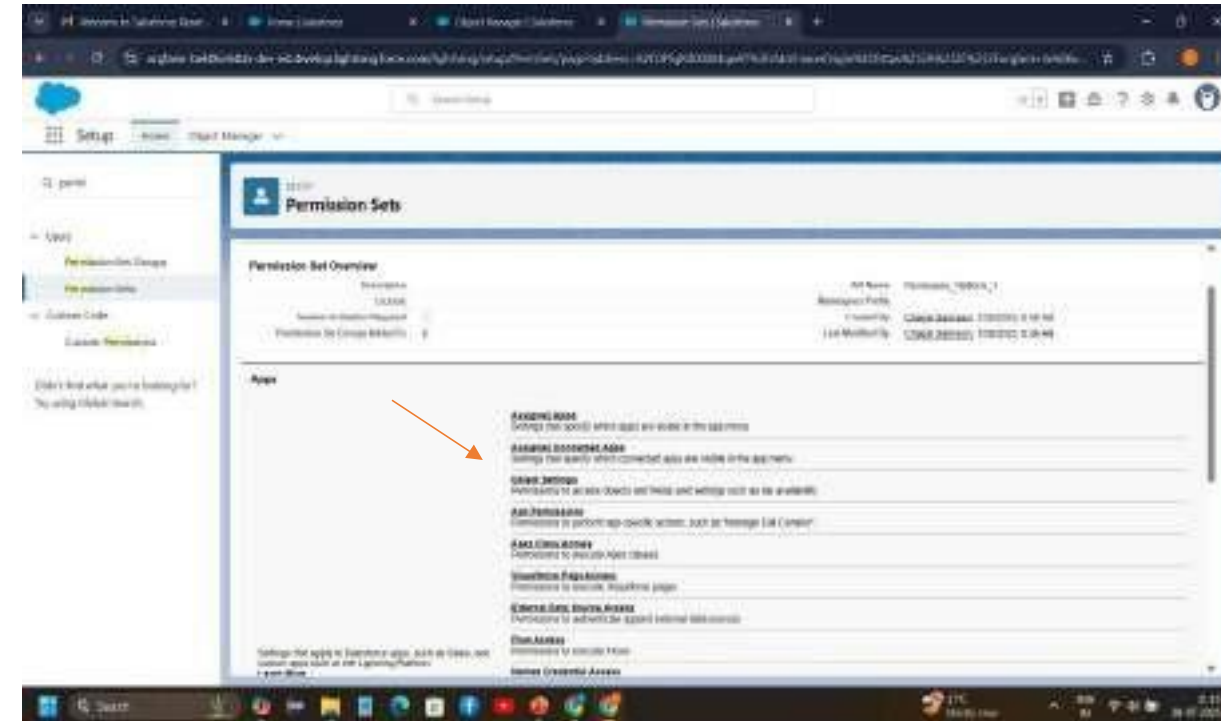
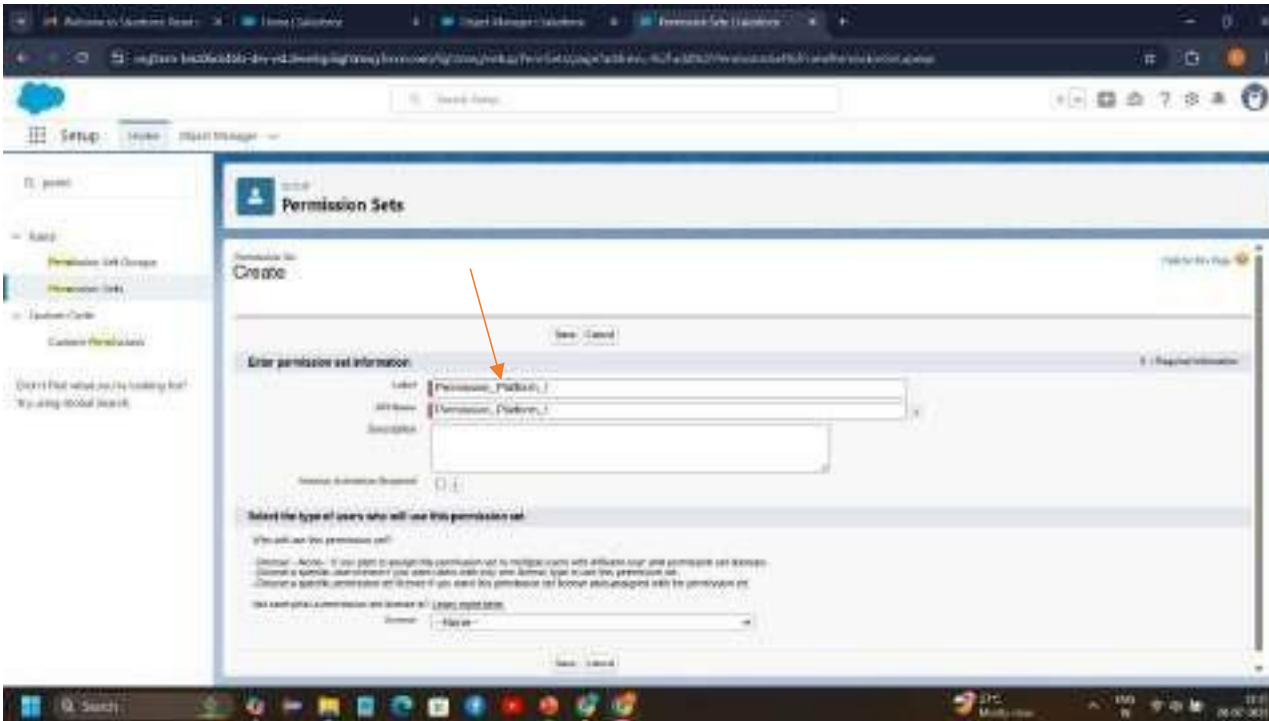
12/1/2023 11:41 AM

Page 1 of 4

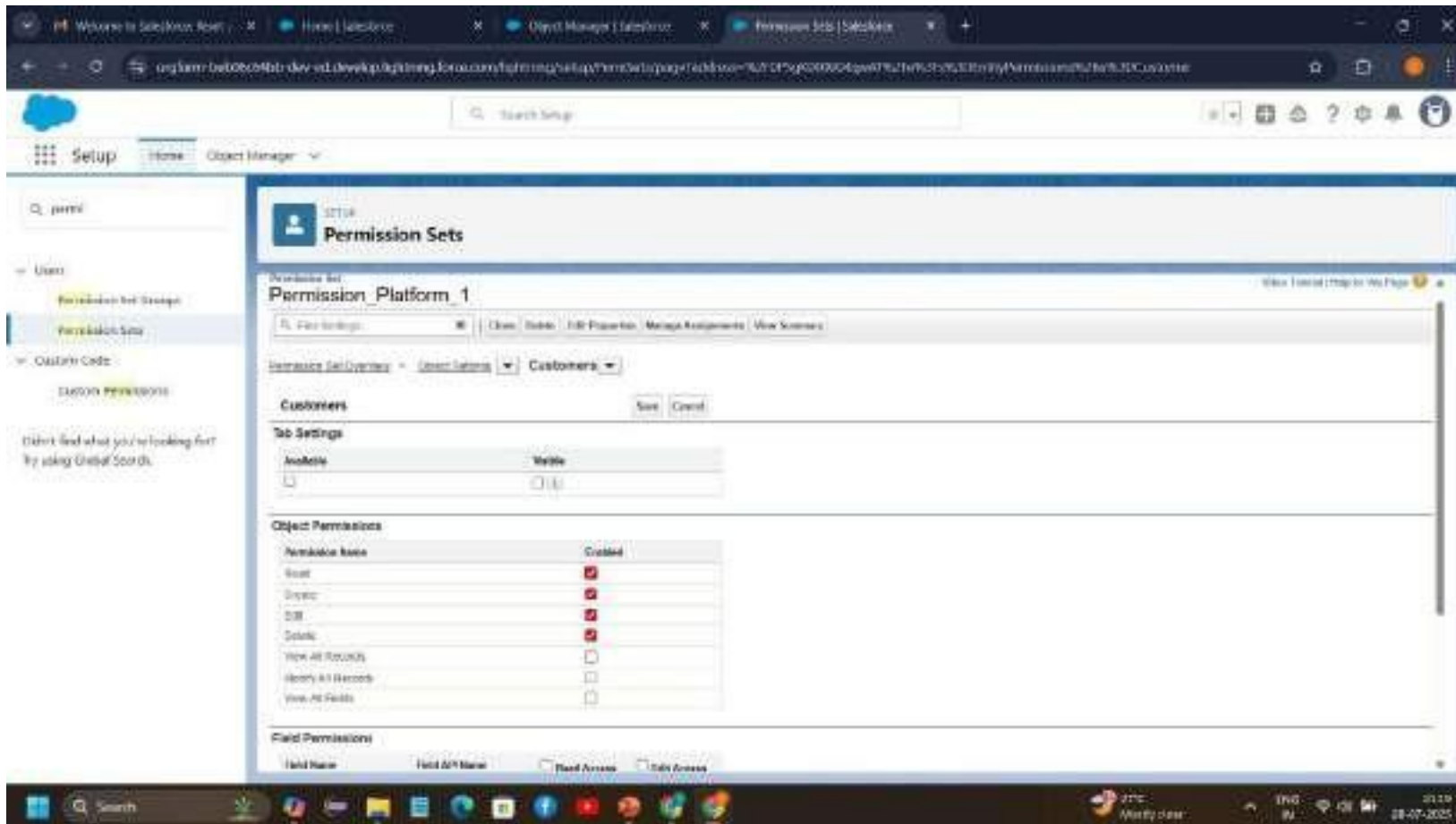
27°C Mostly clear ING 20-07-2023

Enter the label name as “Permission_Platform_1” → save.

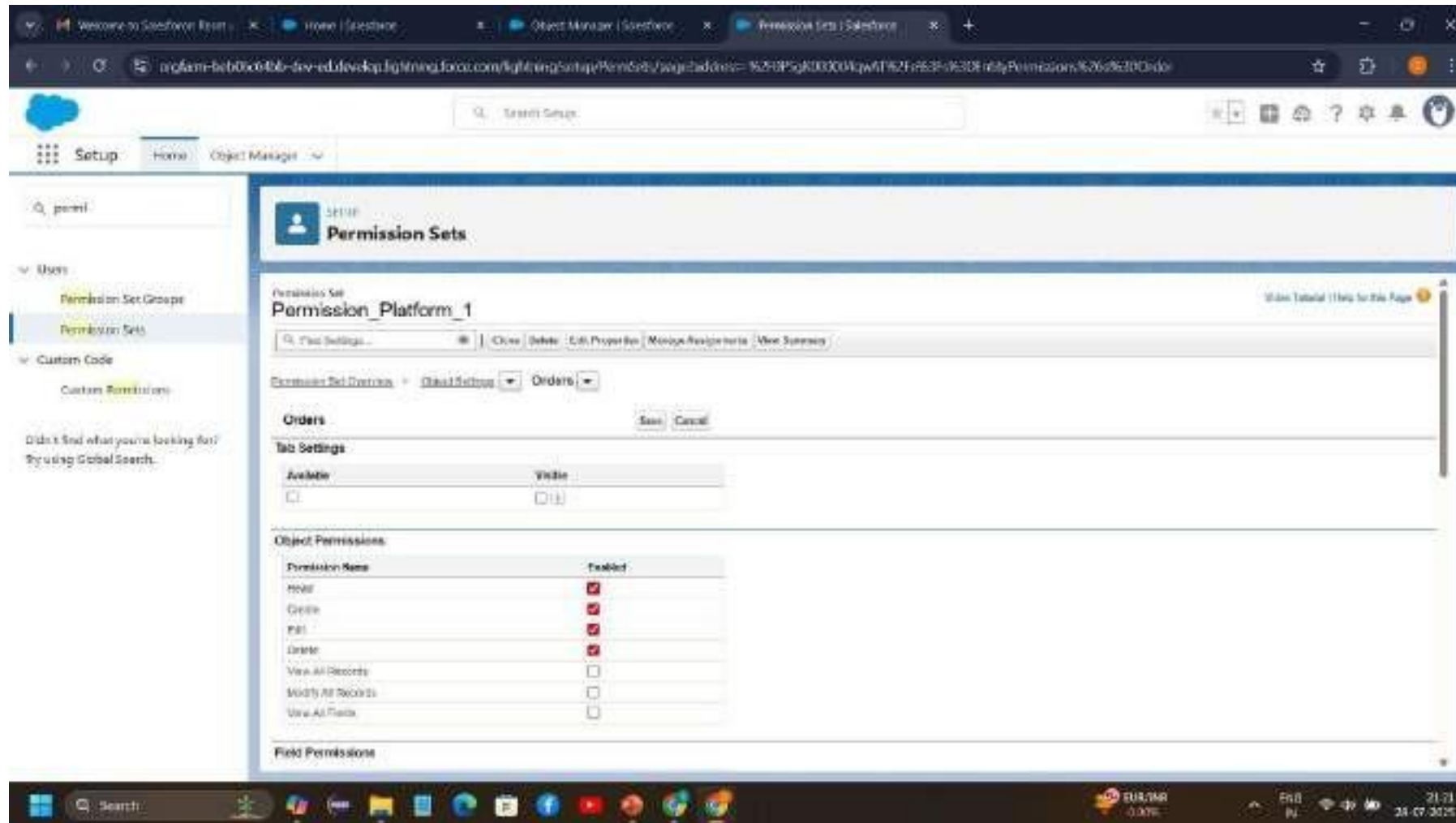
Under Apps Select object settings.



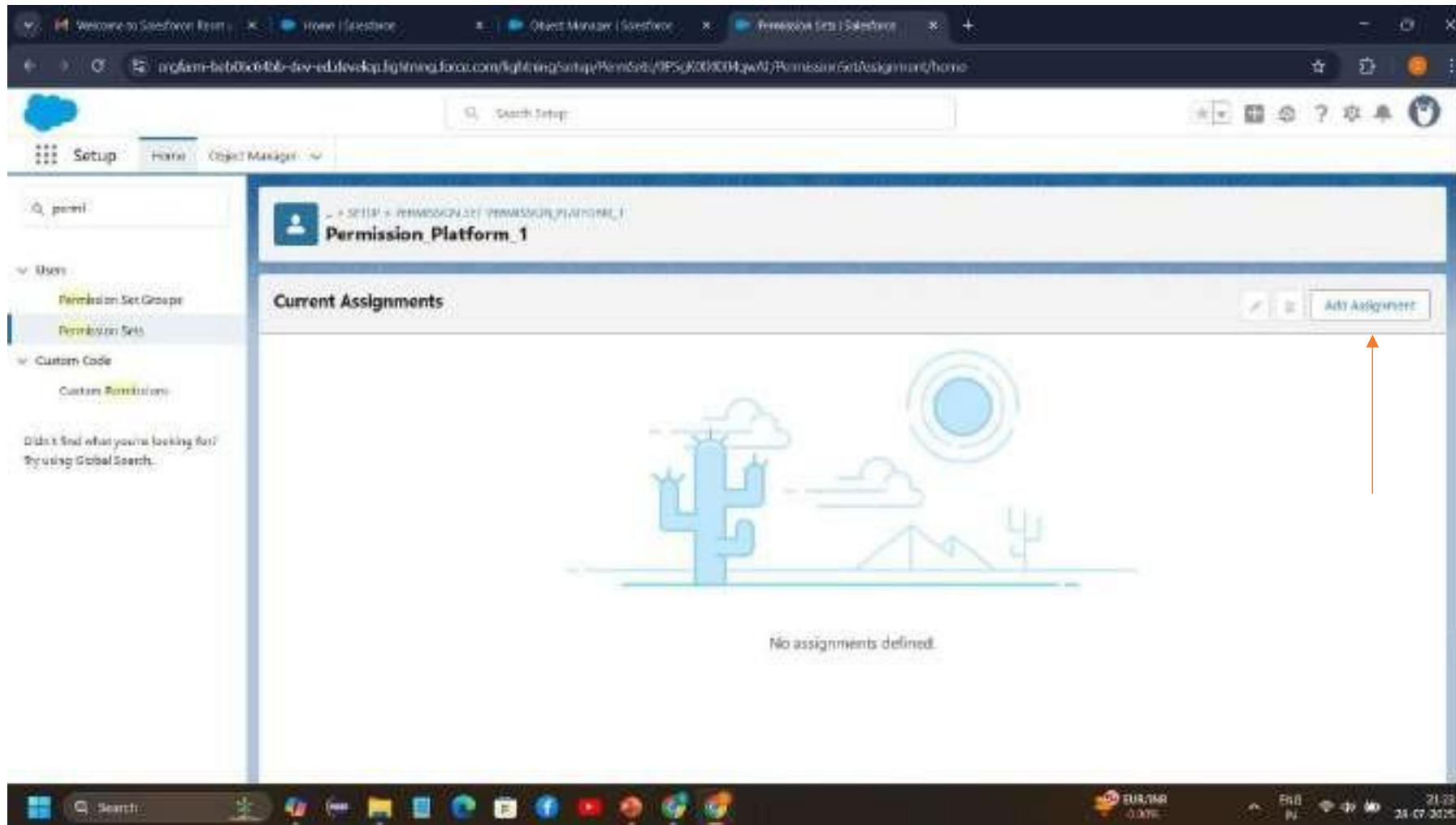
Click on Customer object → click on Edit → under object permission check for read, create, edit, delete for HandsMen Customer object.



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.

The screenshot shows the Salesforce Setup interface, specifically the 'Users' section under 'Setup'. The left sidebar contains navigation options like 'Hyperforce Assistant', 'Users', 'Permission Set Groups', 'Permission Sets', 'Apps', 'Mobile Apps', 'Salesforce', 'Feature Settings', 'Digital Experiences', 'Functions', 'Sales', 'Accounts', 'Person Accounts', and 'Salesforce Scheduler'. The main area displays a table of users:

	Full Name ↑	Alias ↓	Username	Role	Active	Profile
<input type="checkbox"/>	Chagal Samreen	sam	samreenchagal@orgengine.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Charter Super	Charter	charm00djk0080071fuaL.uLn.fJewTyl@charter.salesforce.com		<input checked="" type="checkbox"/>	Charter Free User
<input type="checkbox"/>	Integration User	imag	integration@00fgel000711fuaL.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Kul Mikaelson	kmlka	samreenchagal@gmail.com	Inventory	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Niklaus Mikaelson	nmlka	samreenchagal@gmail.com	Sales	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Dipkarm EPC	DEPC	epk49co076dMUI3@orgengine.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Security User	sec	insightsecurity@00djk0080071fuaL.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input checked="" type="checkbox"/>	User User1	user1	userus1chag@gmail.com		<input checked="" type="checkbox"/>	Purview 2

An orange arrow points to the 'Analytics Cloud Security User' profile.

Email Template

Create an Order Confirmation Email Template

Steps to Create a Classic Email Template

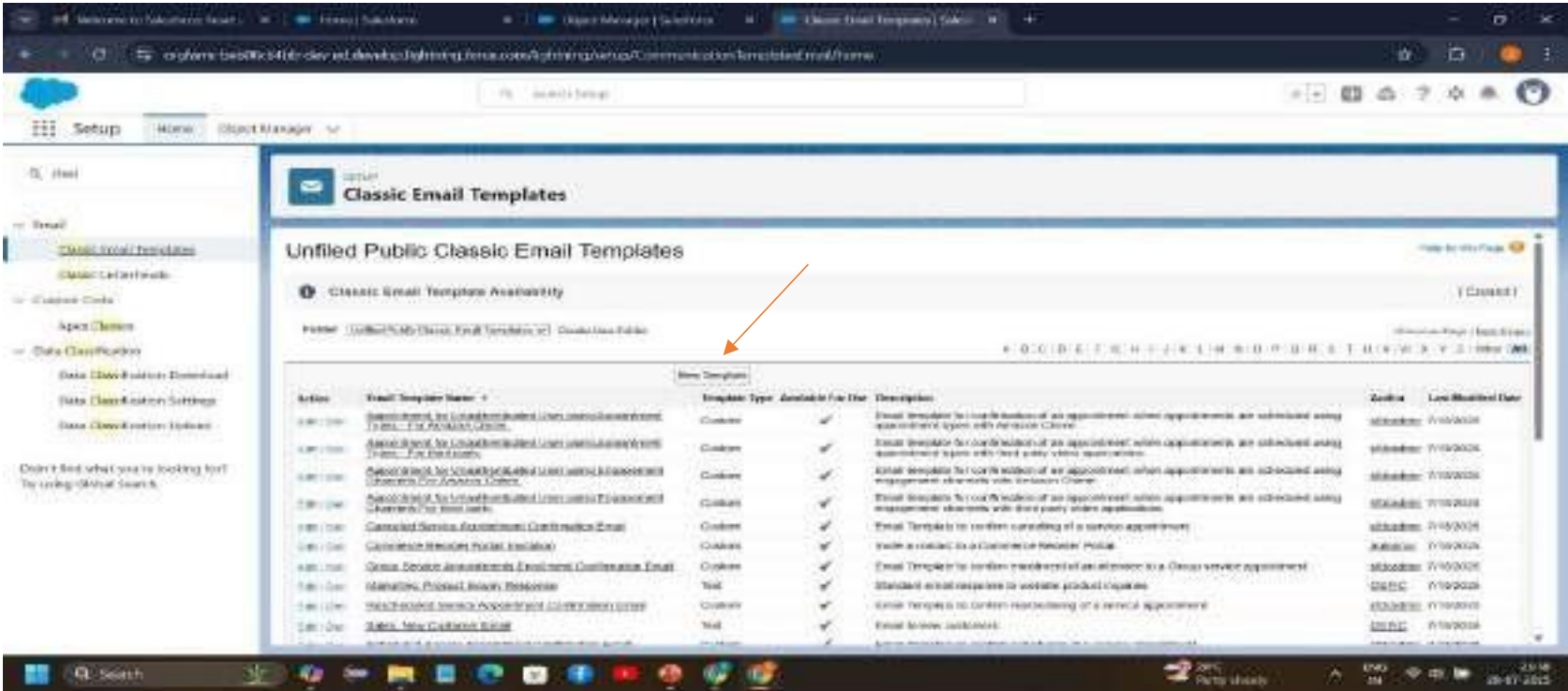
Go to Salesforce Setup

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

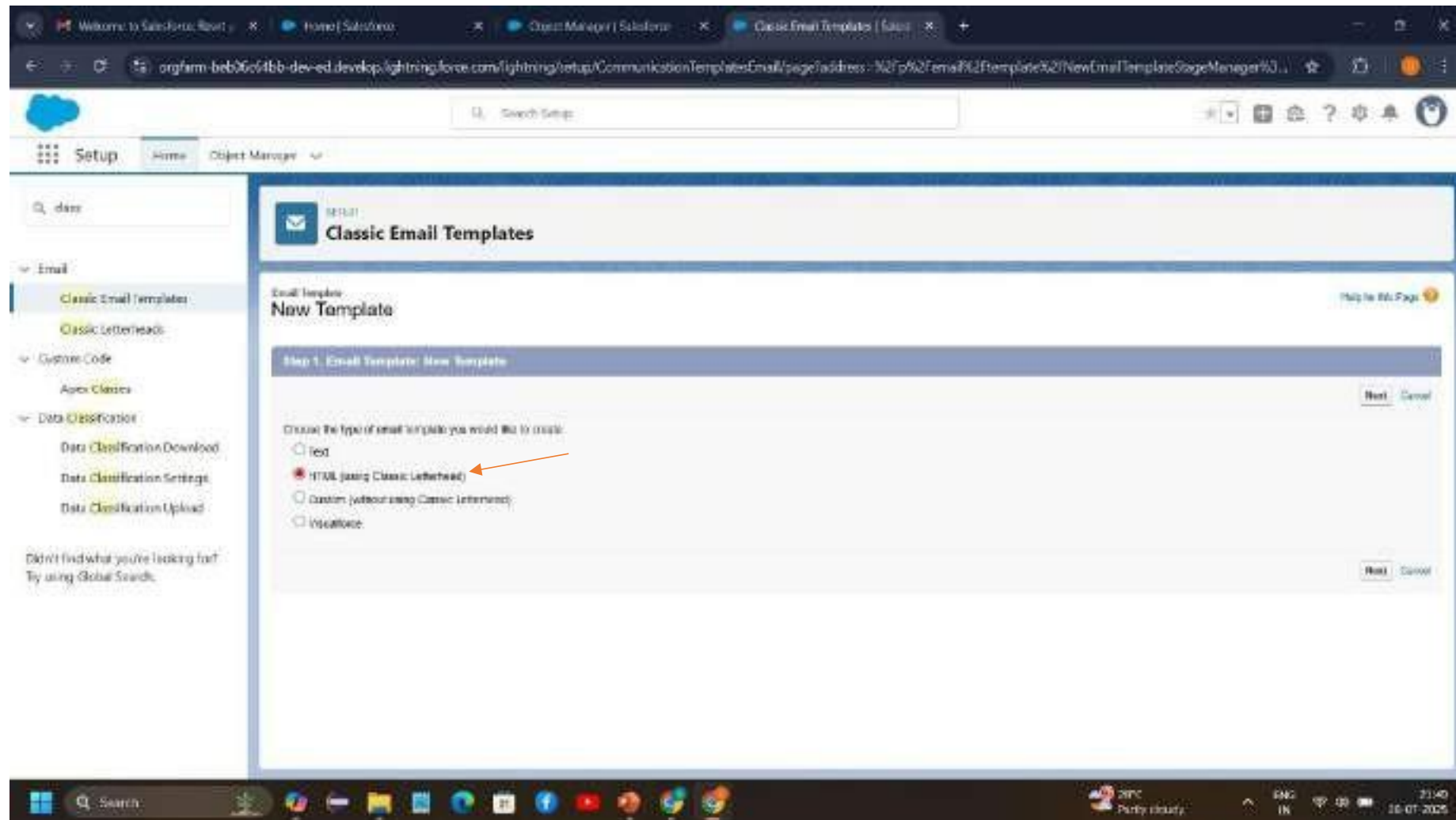
Navigate to Classic Email Templates

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!!

The screenshot shows the Salesforce 'Classic Email Templates' interface. The left sidebar contains navigation links for 'Email', 'Classic Email Templates', 'Classic Letterheads', 'Custom Code', 'App Classic', 'Data Classification', 'Data Classification Download', 'Data Classification Settings', and 'Data Classification Upload'. The main content area is titled 'Classic Email Templates' and shows the 'New Template' form. The form is titled 'Step 2: HTML Email Template: New Template' and is Step 2 of 4. It contains the following fields:

- Folder: Unified Public Classic Email Templates
- Available for Use: ☒
- Email Template Name: Order_Confirmation_Email (highlighted by an orange arrow)
- Template Unique Name: Order_Confirmation_Email
- Classic Letterhead: None
- Email Layout: None
- Encoding: Unicode (UTF-8)
- Description:
- Subject: Your Order has been Confirmed

Buttons for 'Previous', 'Next', and 'Cancel' are visible at the bottom right of the form.

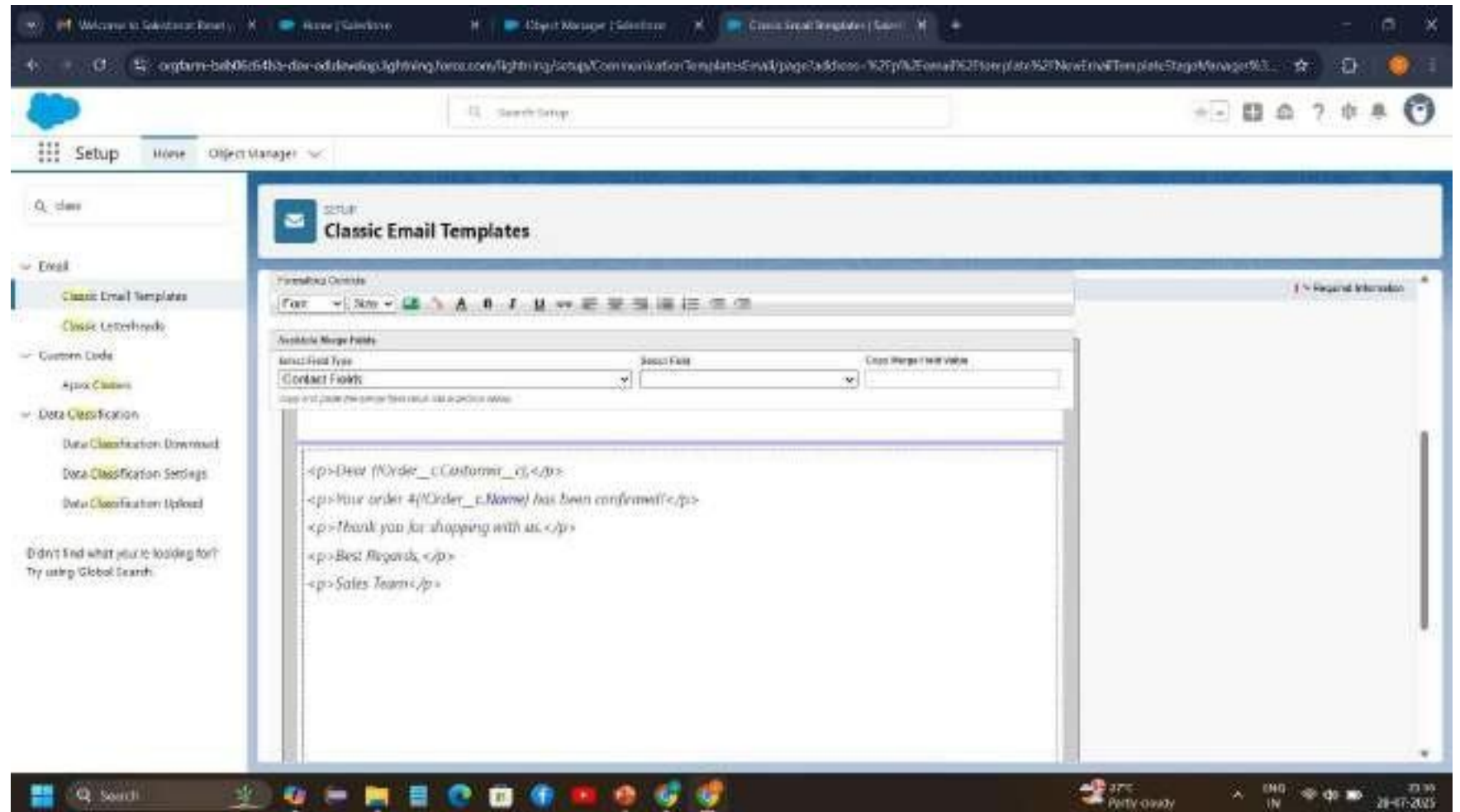
HTML Body:

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

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

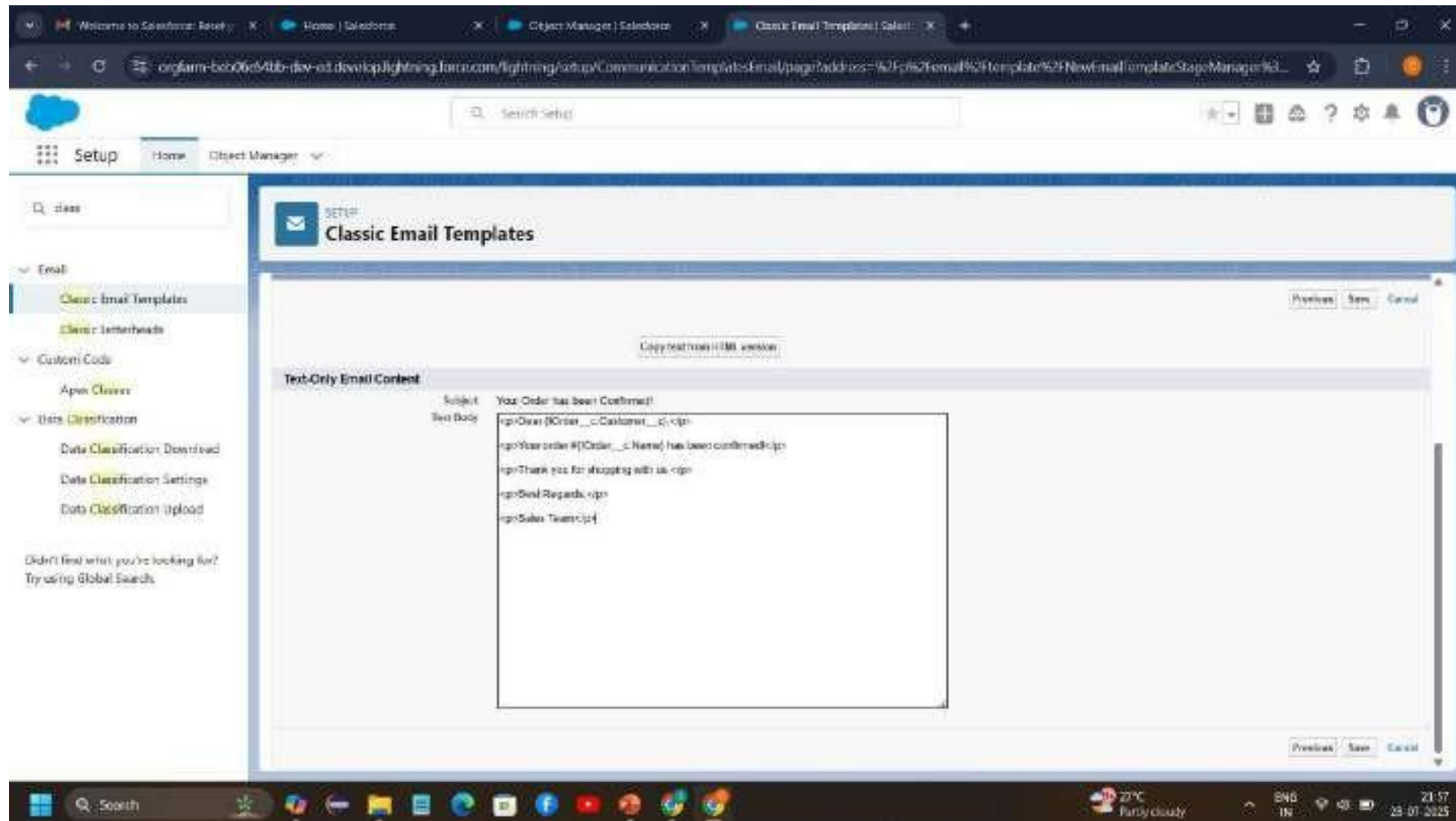
<p>Thank you for shopping with us.</p>

<p>Best Regards,</p>

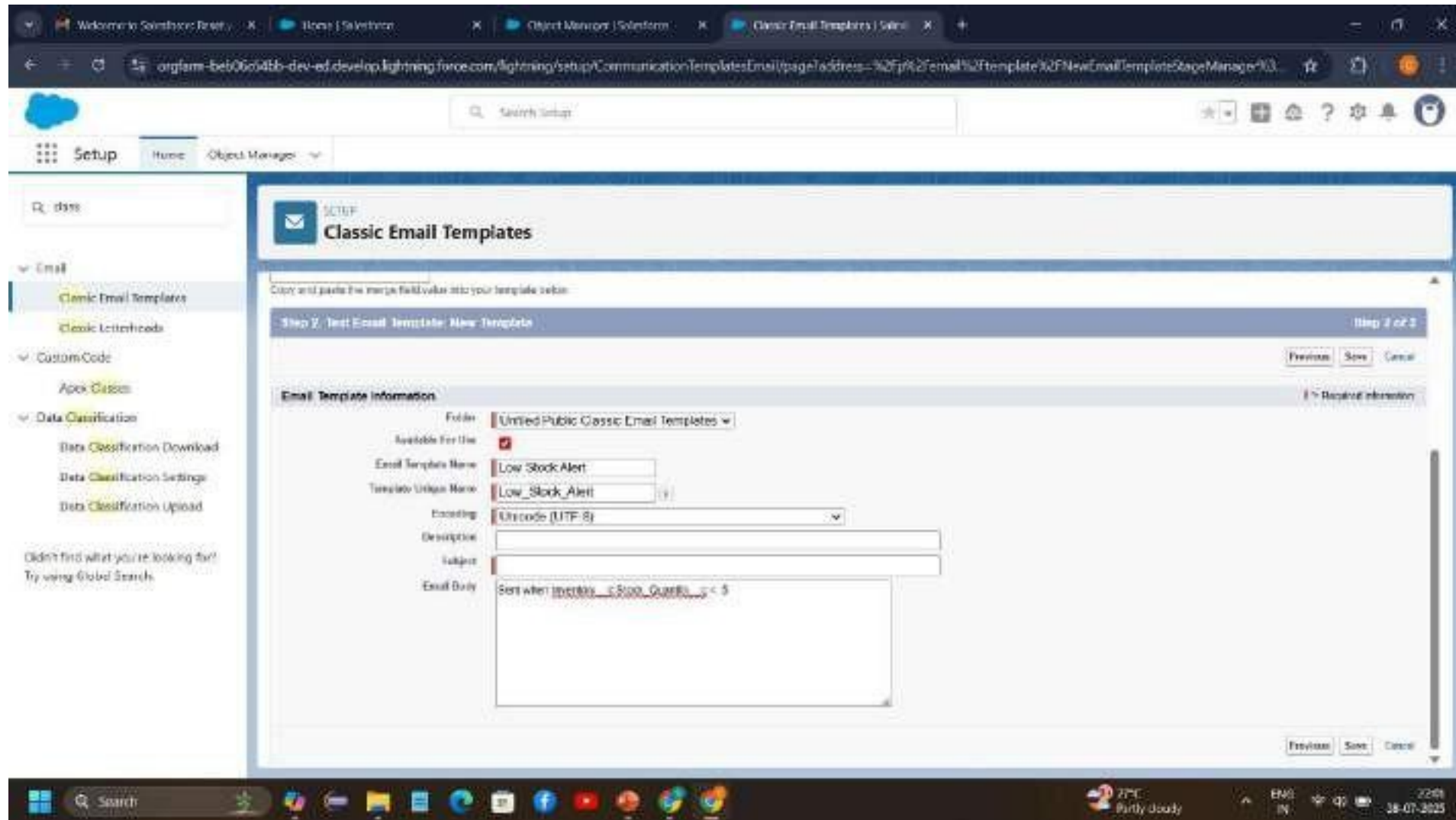


<p>Sales Team</p>

Save the Template.



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



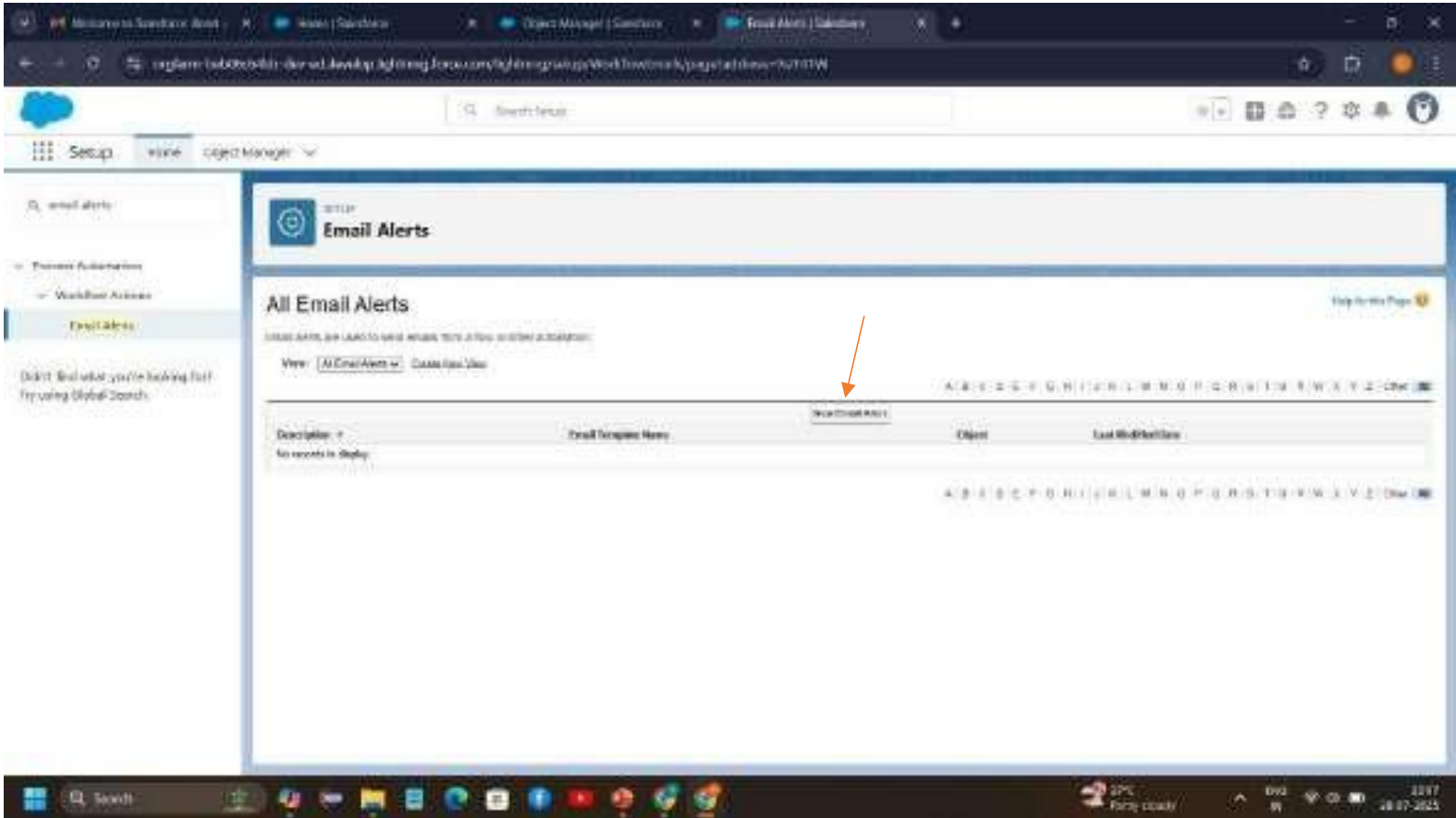
Create Remaining Email Template with the name **Loyalty Program Email**" as mentioned in the Email Template description.

Create an email alert 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.

Web browser tabs: Welcome to Salesforce Dev | Home | Salesforce | Object Manager | Salesforce | Email Alerts | Salesforce

Address bar: orgfarm-bab06c54bb-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowEmails/pageAddress=%2F01W%2Fw%3Fv%3D%252F01W

Search Setup

Setup Home Object Manager

email alerts

Process Automation Workflow Actions Email Alerts

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

SETUP Email Alerts

CHOOSE AN OBJECT AND TO ASSOCIATE WITH ONE OR MORE WORKFLOW RULES, BUSINESS PROCESS, OR AUTOMATED PROCESSES. WHEN CHANGING AN EMAIL ALERT, THE MODIFICATION WILL APPLY TO ALL RULES, PROCESSES, OR AUTOMATED PROCESSES ASSOCIATED WITH IT.

Email Alert Edit

Save Save & New Cancel

Edit Email Alert

1 Required Information

Description: Order Confirmation Email Alert

Unique Name: Order_Confirmation_Email

Object: HandsMan Order

Email Template: Order_Confirmation_Email

Protected Component: ☐

Recipient Type: Search: User Find

Recipients:

Available Recipients	Selected Recipients
User: Integration User	User: Orginal Elements
User: Kari Mikaelson	
User: Niklaus Mikaelson	
User: Originals EPIC	
User: Security User	
User: User User1	

Buttons: Add, Remove

System tray: 27°C Partly cloudy, ENG, UN, 22:11, 28.07.2025

Flows

Create Order Confirmation Email

Order Confirmation Email (Record-Triggered)

Go to Setup → Flow

In Quick Find, search for Flows and click on it

Development with Agents | Welcome to ServiceNow | Home | Select a role | Home | Select a role

explains-66b9a64d-dev-ed.develop.lightning.force.com/?l=explainsnapFlows/home

Search Setup

Setup | Home | Object Manager

Flows

Process Automation

Flows

Identity

Light Flows

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

Flow Definitions

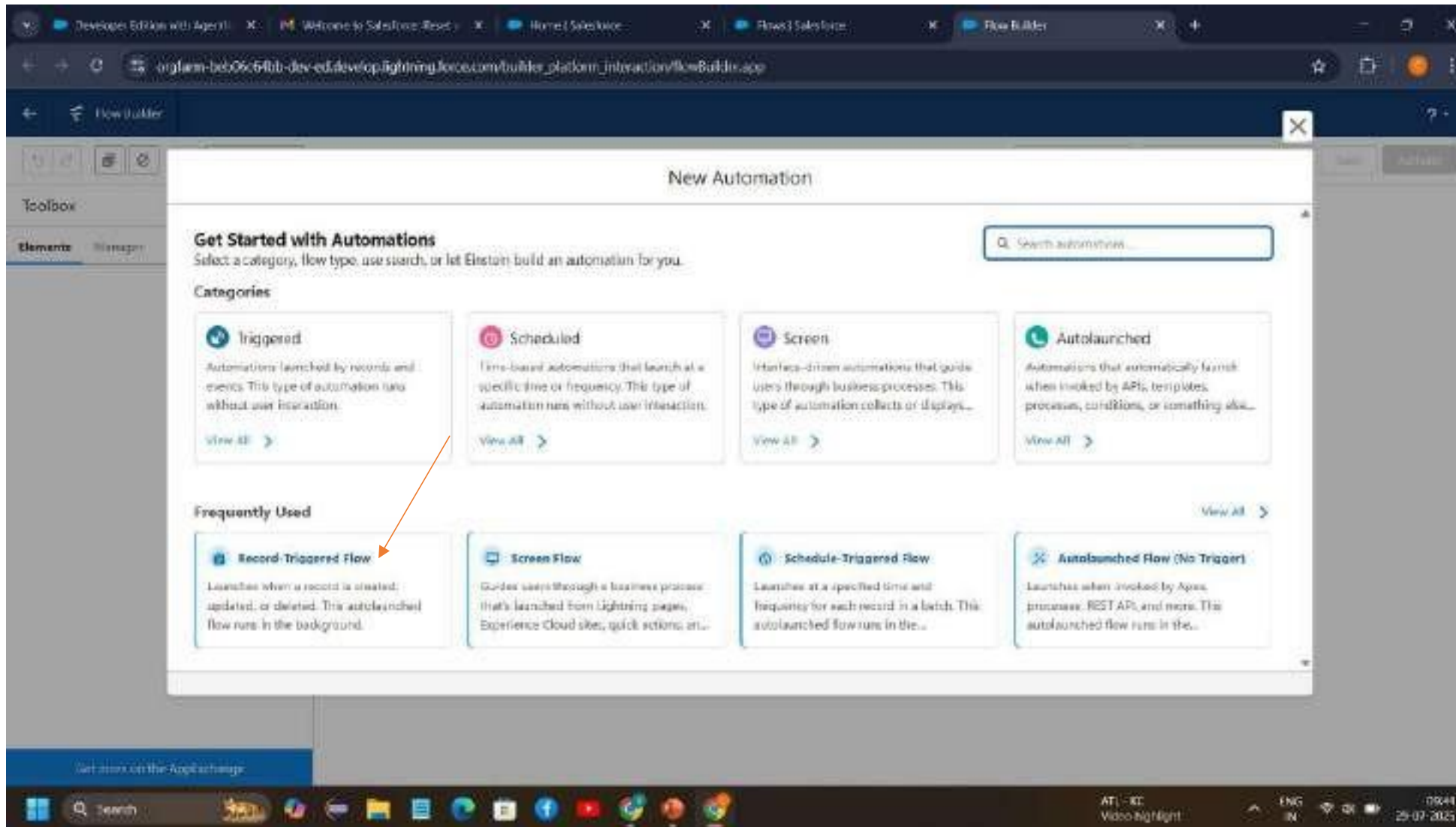
All Flows

Sort your list view with more options.
Organize your automation with categories and subcategories.
If you don't see the app in the App Launcher, click that Enable the Automation Lighting App is selected in Process Automation Settings.

Flow Label | Process Type | Active | Template | Package State | Package | Last M... | Last M...

Add or Modify Service Appointment Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Evaluate Approval Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Basic Approval Request	Flow Orchestration for UFS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Issues Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Issues Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Check Record is Agent and Guest	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Check Record is Agent with the Right Skills	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Check Flow API Name	AppLaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Check Service Flow Eligibility	AppLaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	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 'Record-Triggered Flow' starting with a 'Start' node, followed by 'Object: HandMade Order', 'Trigger: A record is updated', and 'Condition: If'. Below this is a 'Run Immediately' node and an 'End' node. On the right, the 'Configure Start' panel is open. The 'Trigger' is set to 'HandMade Order'. Under 'Configure Trigger', 'Trigger the Flow When' is set to 'A record is updated'. The 'Set Entry Conditions' section shows a condition requirement of 'All Conditions Are Met (AND)'. A condition is defined with the field 'Status__c', the operator 'Equals', and the value 'Confirmed'. Two orange arrows point to the 'HandMade Order' trigger and the 'Status__c' field in the condition.

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

unfcm-bub6u54t6-dev-ed.develop.lightning.force.com/builders/platform/information/flowbuilderapp

Flow Builder

Run | Drafting | Flow Tests | Save As New Element | Save | Publish

Record-Triggered Flow

Start

Object: HandMade Order

Trigger: A record is updated

Condition: If

Optimize for: Actions and Related Records

+ Add Scheduled Inets (Optional)

+ Open Flow Trigger Actions for Hand...

Run Immediately

End

Configure Start

Trigger

HandMade 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. When using a scheduled flow, you can specify when to execute your flow's instances.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. This is called the **Only when a record is updated to meet the condition requirements** option for 'When to Run the Flow for Updated Records'.

Condition Requirement

All Conditions Are Met (AND)

Field

Status__c

Operator

Equals

Value

Confirmed

+ Add Condition

Add an "Action" Element Click the
"+" icon → Select Action.

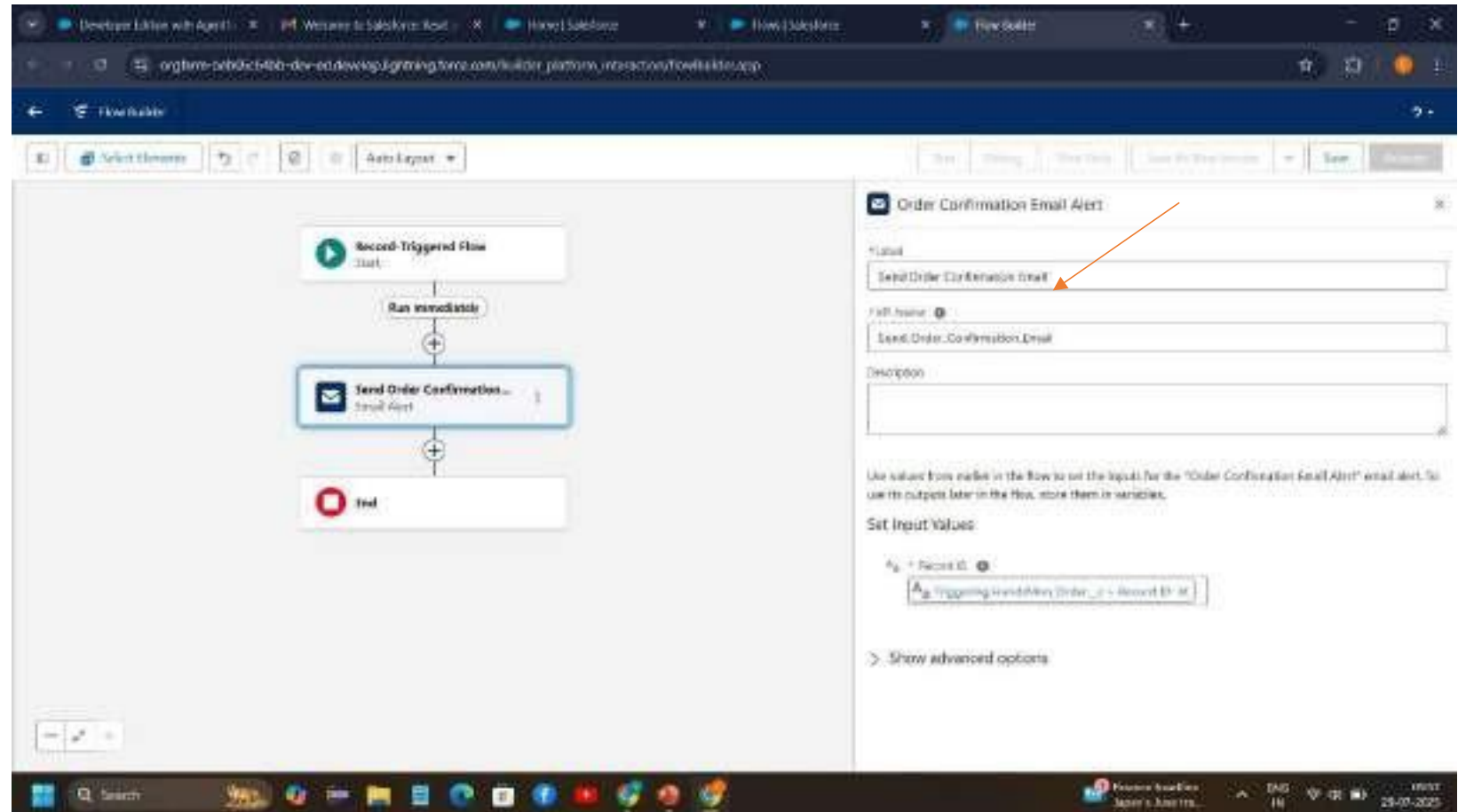
Action Type: Send Email Alert

Email Alert: Select Order Confirmation Email Alert

Label : Send Order Confirmation Email

Record ID : {!\$[Record.Id](#)}

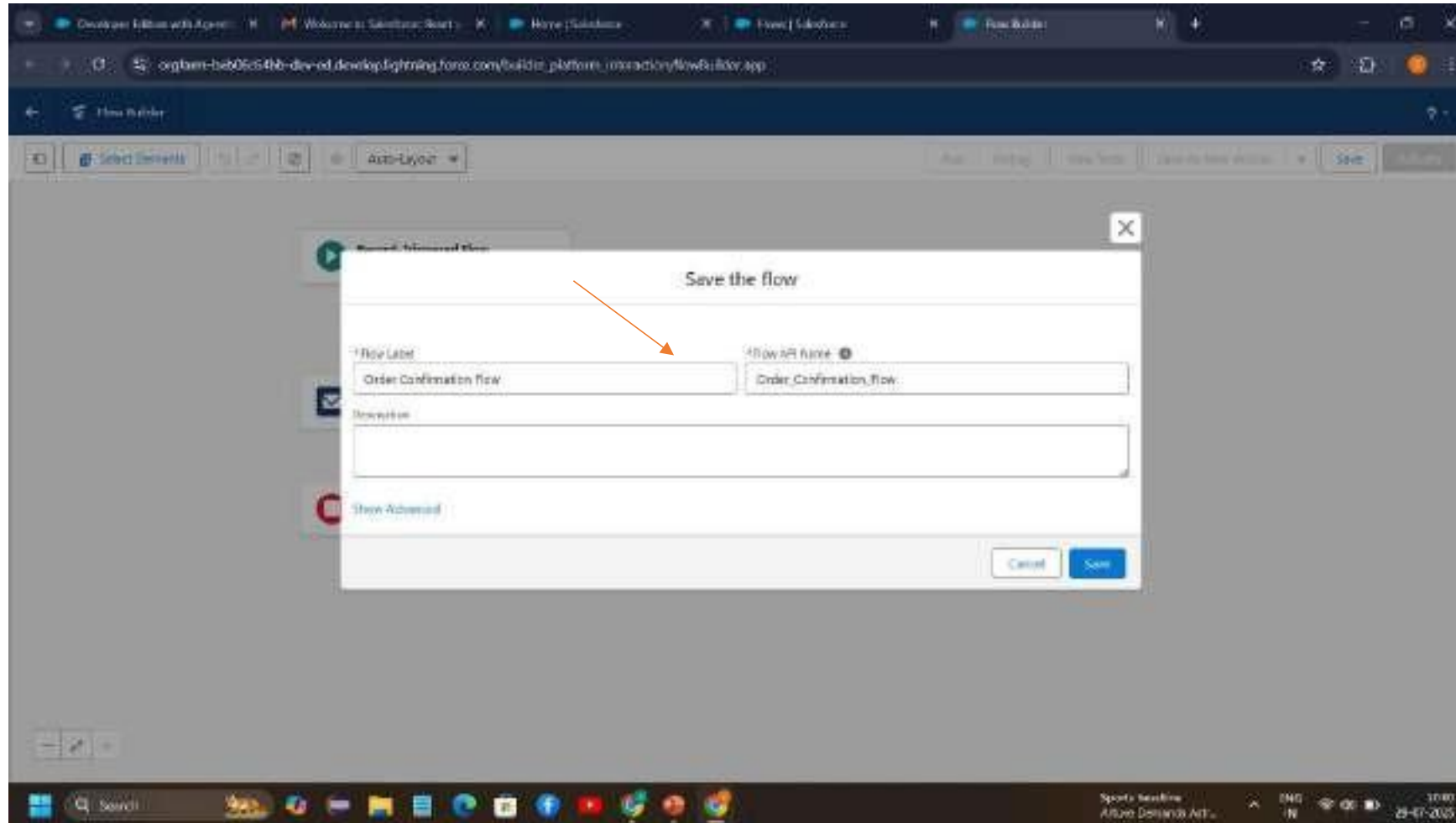
Click Save.



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

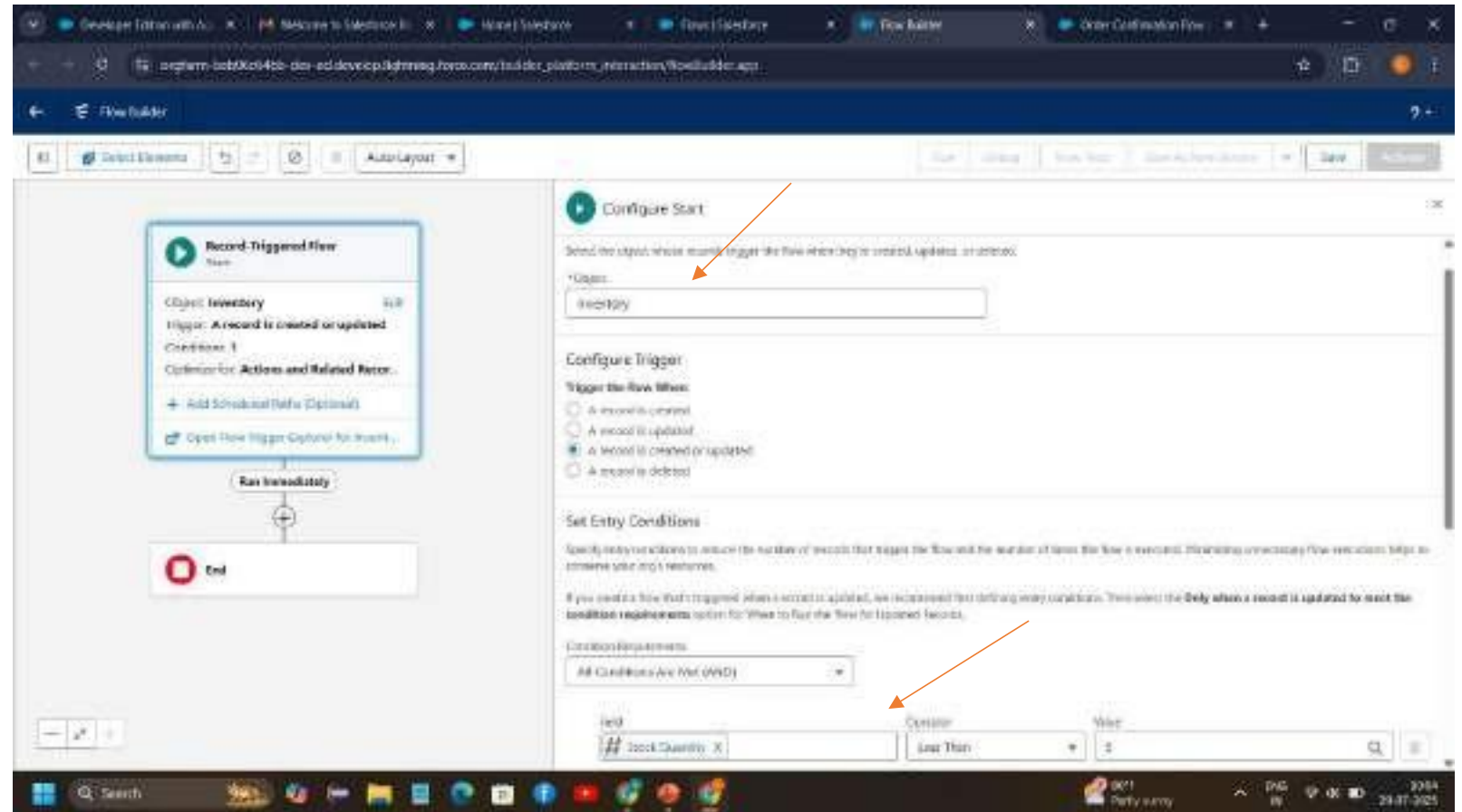
Trigger: When a record is created or updated
Condition:
Field: Stock_Quantity__c < 5
Select:
Every time a record is updated and meets the condition requirements
Click Done.

Add an "Action" Element
Click the "+" icon → Select Action.

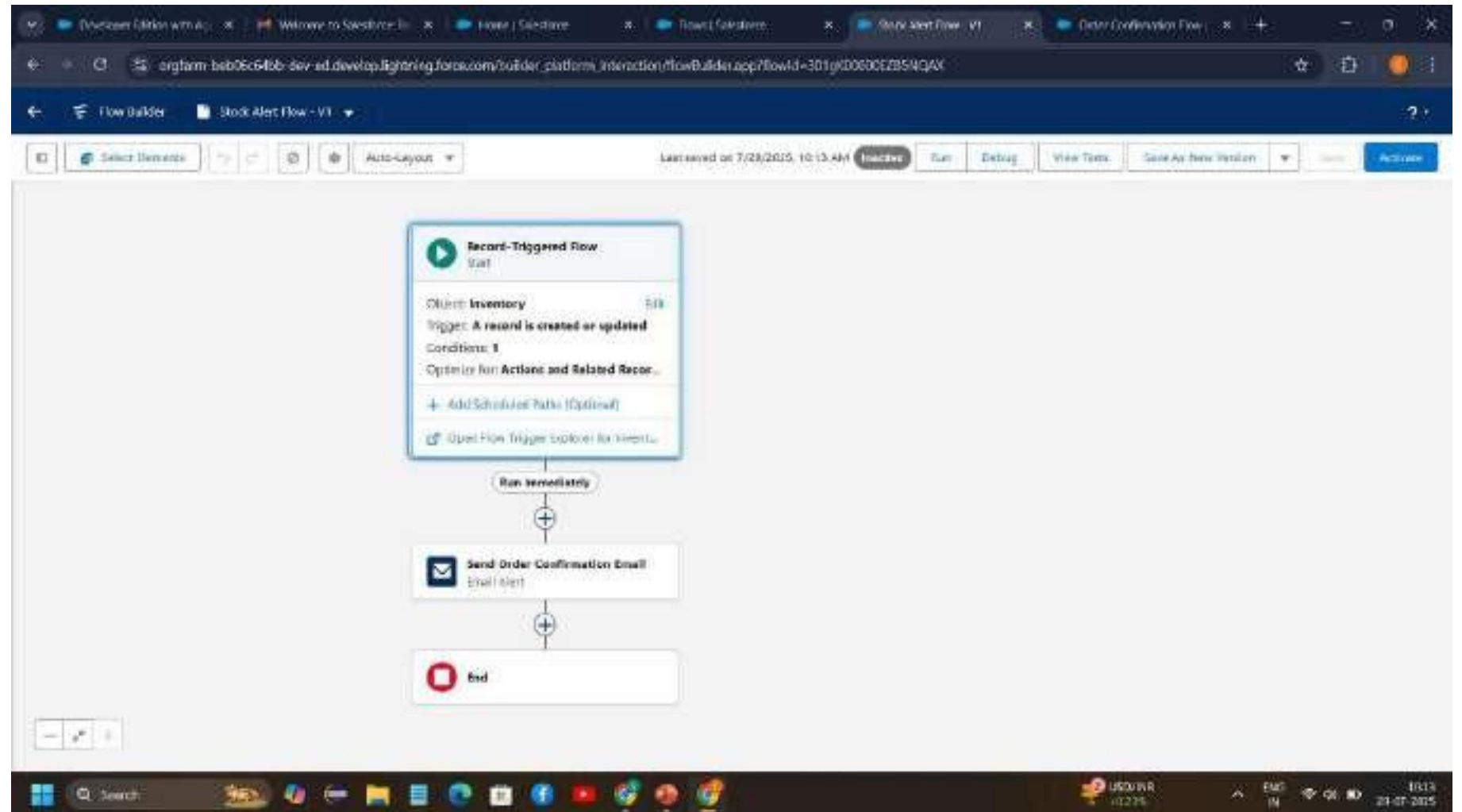
Action Type: Send Email Alert

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

Recipient: Inventory Manager.



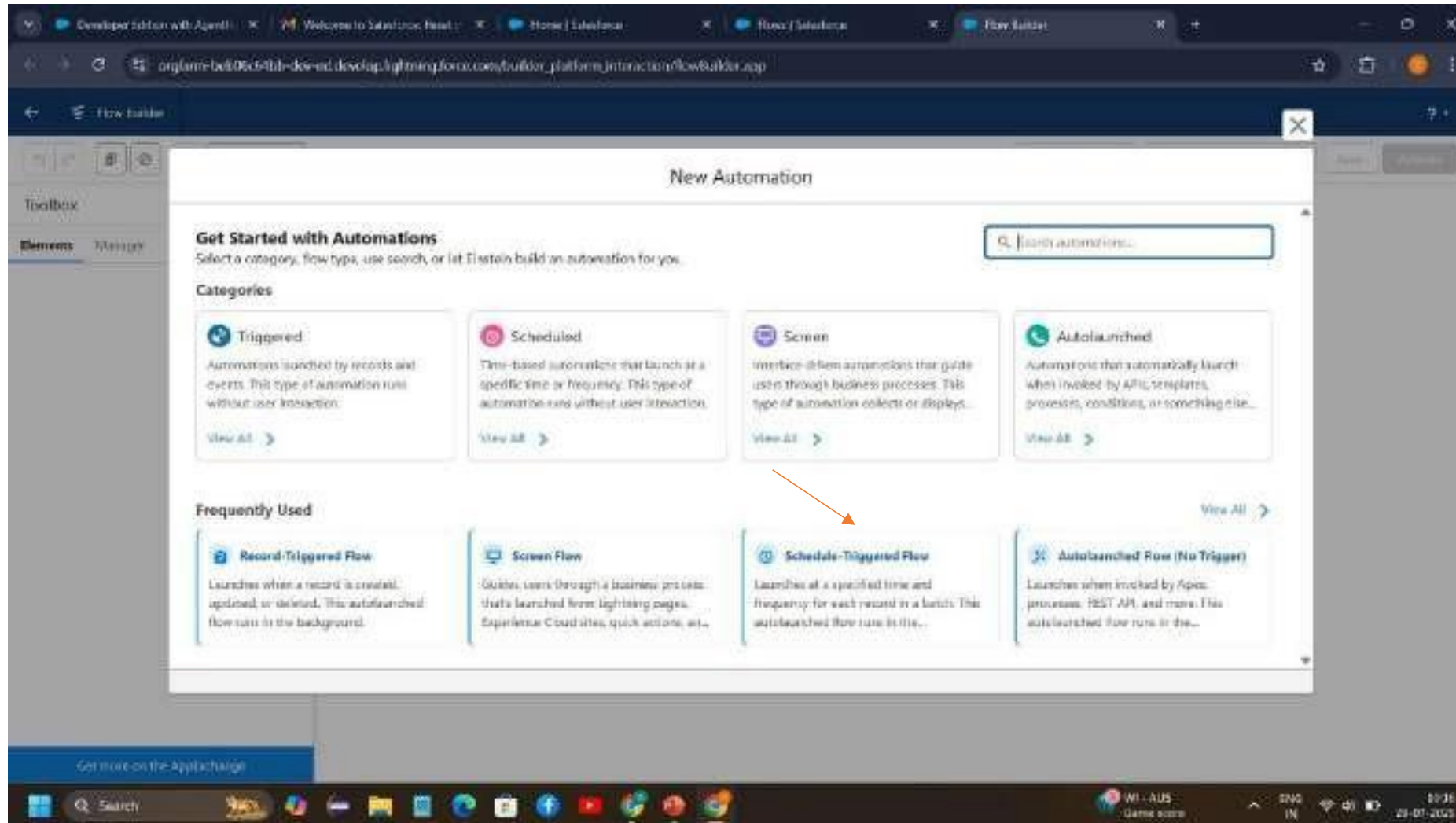
Save & Activate the Flow
Name: Stock Alert Flow
Click Save → Activate.



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.

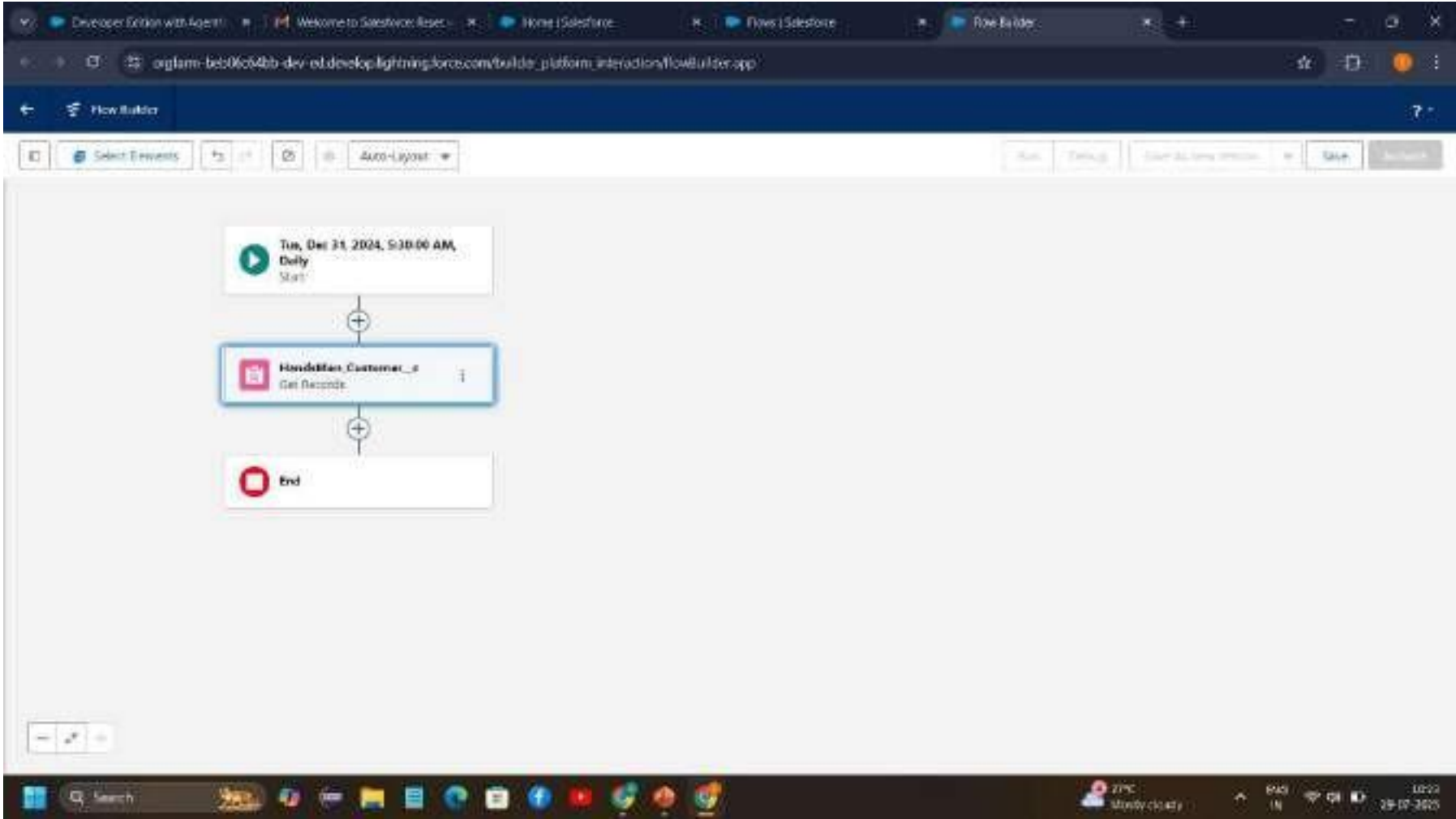
The screenshot displays the Salesforce Flow Builder interface. The main canvas shows a flow starting with a 'Start' event (green play button icon) labeled 'Tue, Dec 31, 2024, 5:30:00 AM, Daily'. Below this event is an 'End' event (red square icon). The 'Start' event is configured with 'Flow Starts: Tue, Dec 31, 2024, 5:30:00 AM' and 'Frequency: Daily'. A 'Set a Schedule' configuration panel is open on the right side of the screen. This panel has fields for 'Start Date' (Dec 31, 2024) and 'Start Time' (5:30 AM). The 'Frequency' dropdown menu is set to 'Daily'. An orange arrow points to the 'Daily' option in the frequency dropdown. The top of the browser window shows the URL 'org/flow-builder-dev-ed.develop.lightning.force.com/builder_platform/interaction/flowBuilder.app'. The bottom of the screen shows the Windows taskbar with various application icons and system information like '27°C Mostly cloudy' and '10:18 20-07-2025'.

Add "Get Records" Element Click the
"+" icon → Select Get Records.

Object: HandsMen_Customer__c

Filter: Retrieve all records.

Sort Order: None.
Click Done.



Add "Loop" Element

Click the "+" icon → Select

Loop. Collection: {!Get_Records}

Direction: First to Last. Click

Done.

Inside Loop -

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

Set Conditions:

If Total_Purchases__c > 1000, Set Loyalty_Status__c = Gold.

Click the "+" Add Update Records

Records to Update: Select Specify Condition

Object: HandsMen Customer

Set Field Values: Loyalty_Status__c = Gold Else if
Total_Purchases__c < 500, Set Loyalty_Status__c =
Bronze.

Else, (Default Outcome) Set Loyalty_Status__c
=Silver.

Click Done.

Save & Activate the Flow

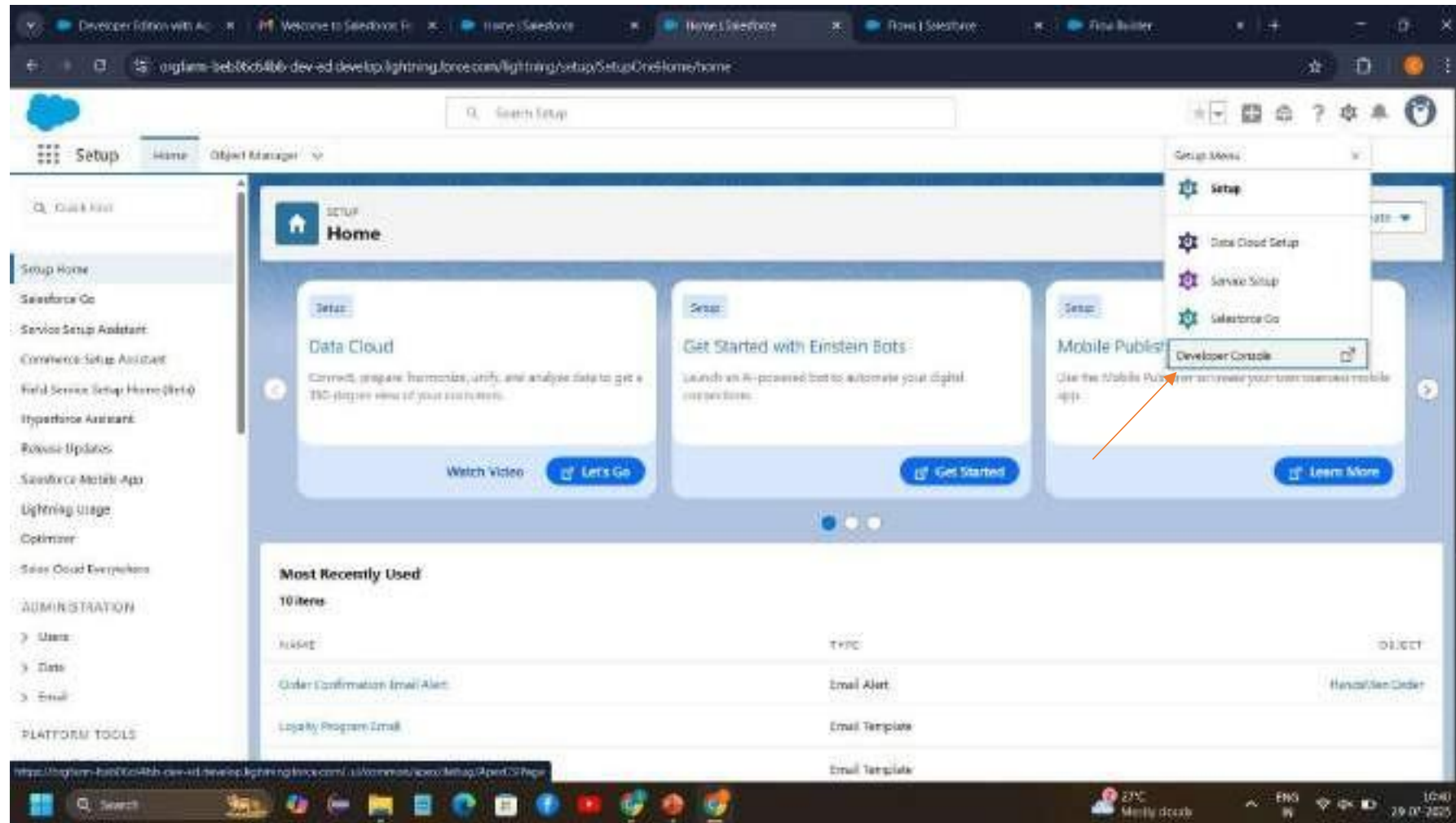
Name: Loyalty Status Update Flow Click Save →
Activate.



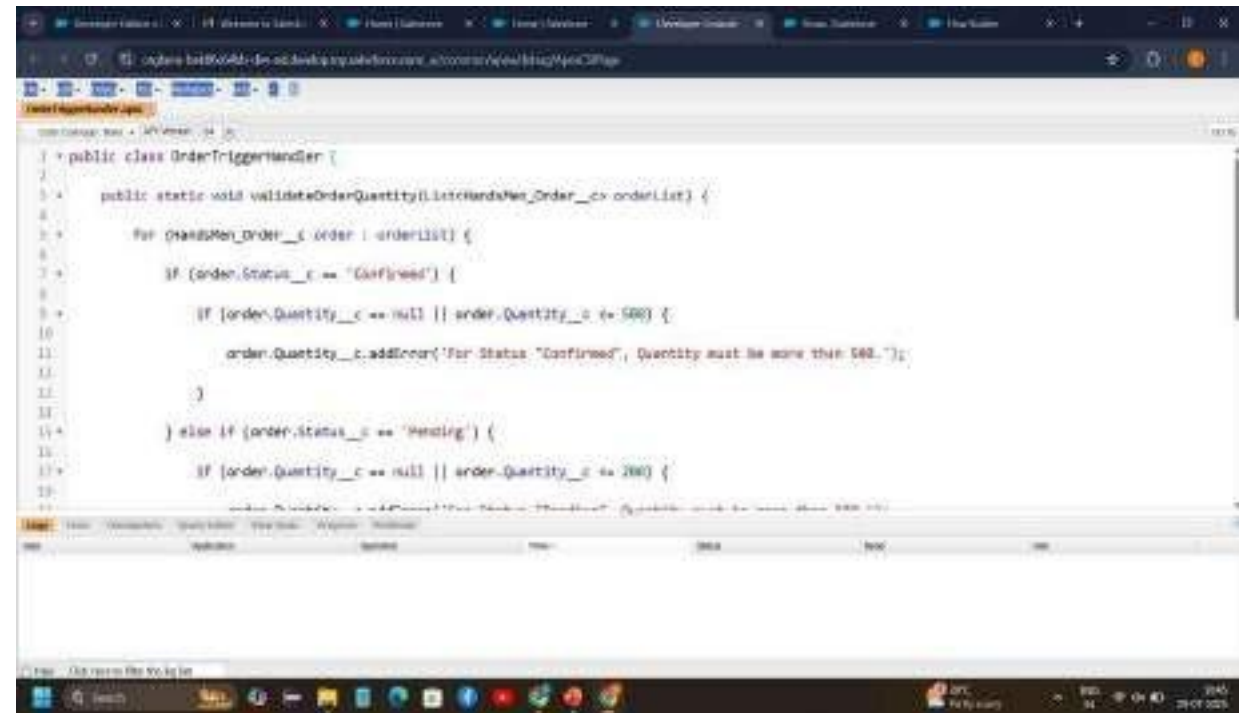
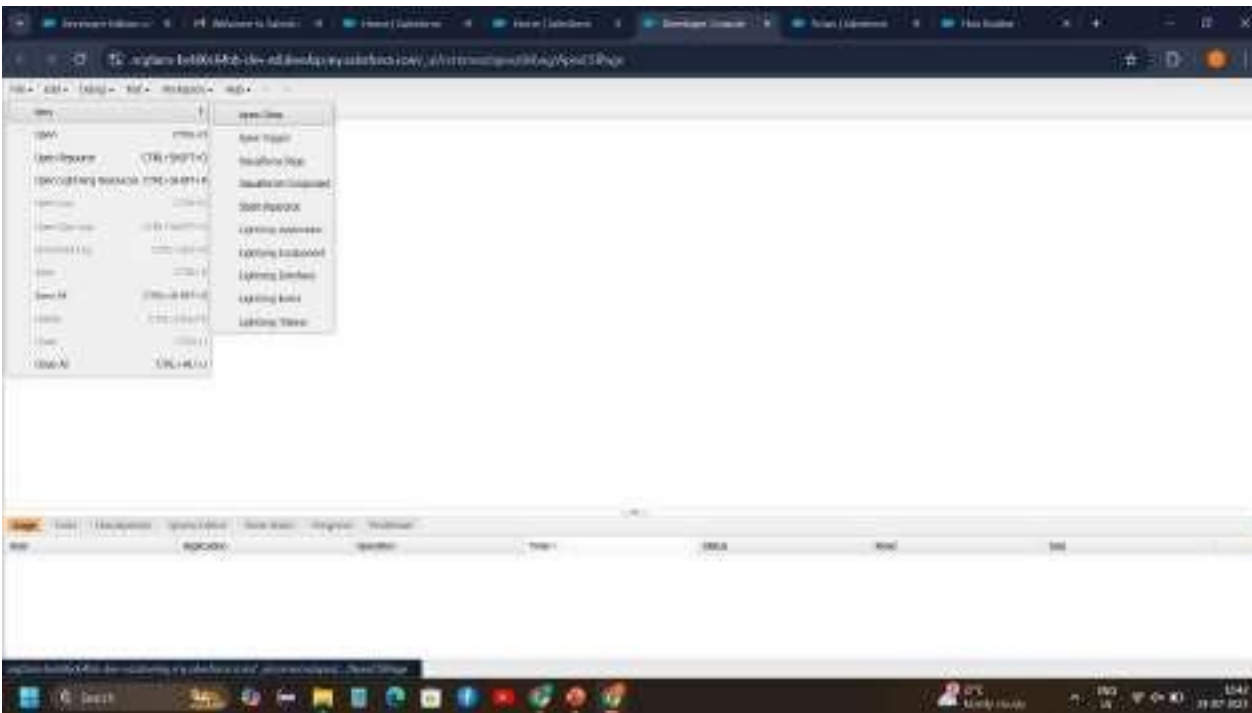
Automation using Apex

Create Apex Class

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



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



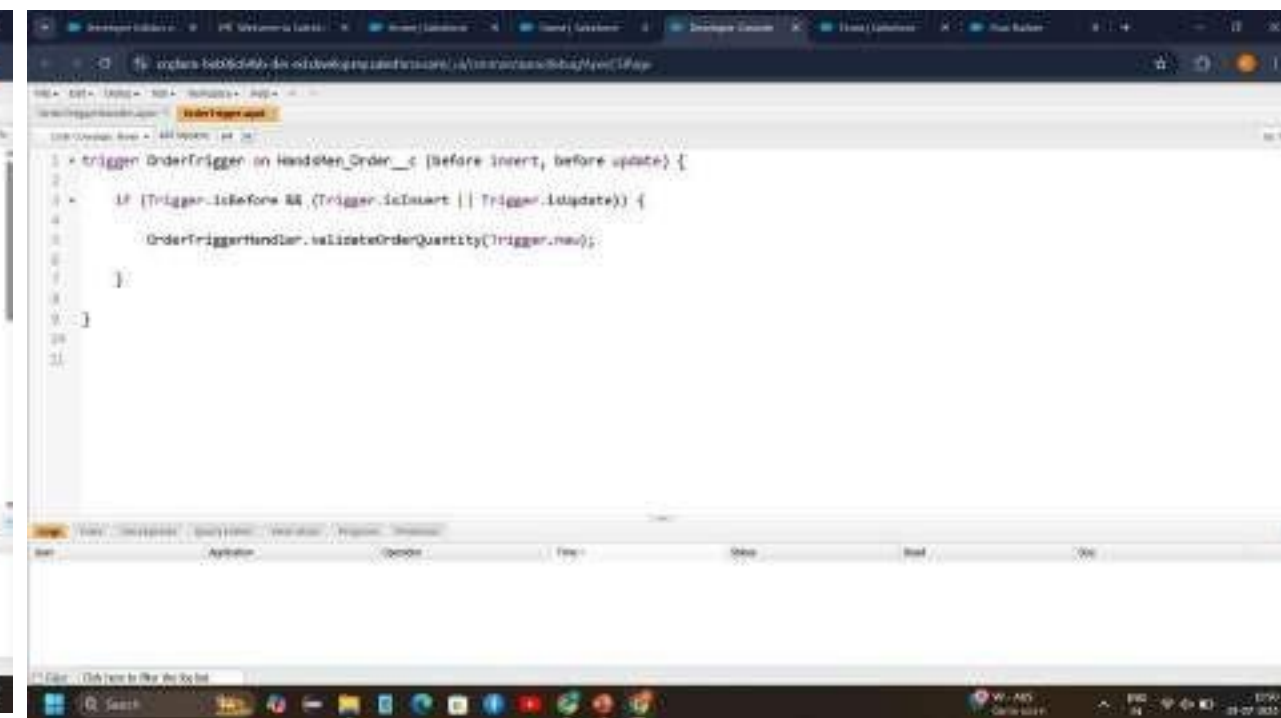
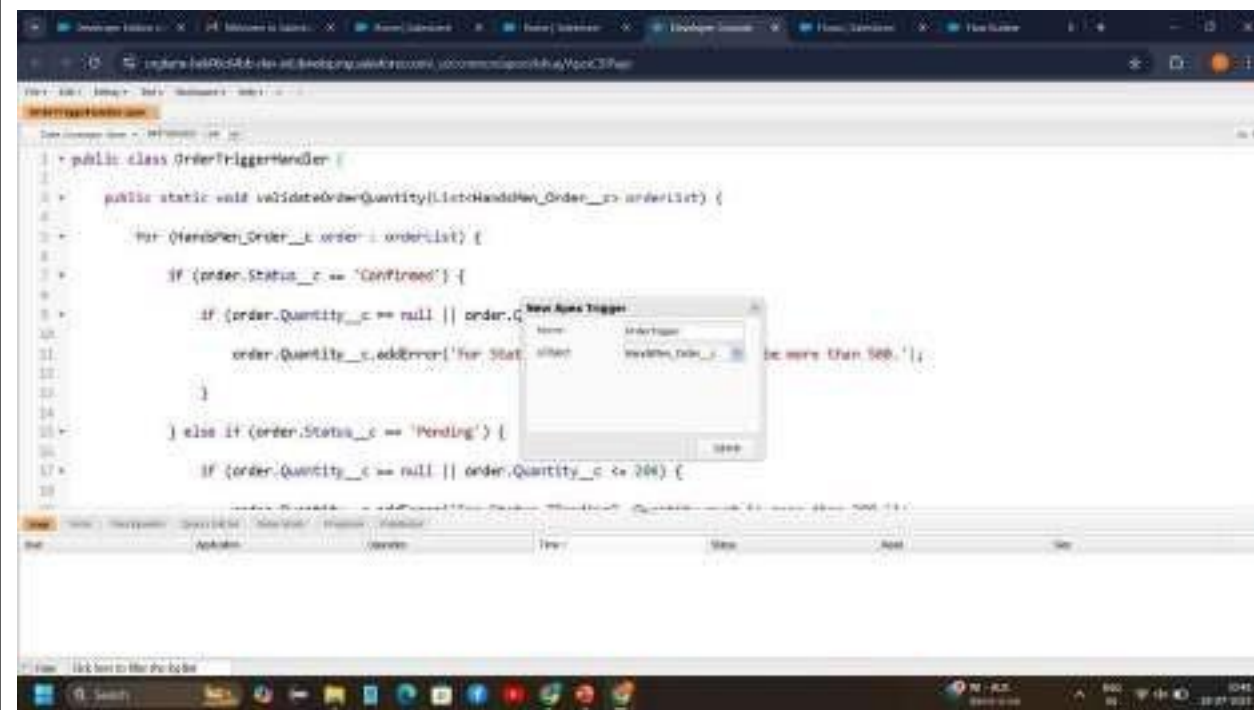
To create a new Apex Trigger follow the below steps:

Click on the file → New → Apex Class.

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

Click Submit.

Now write the code logic here



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.

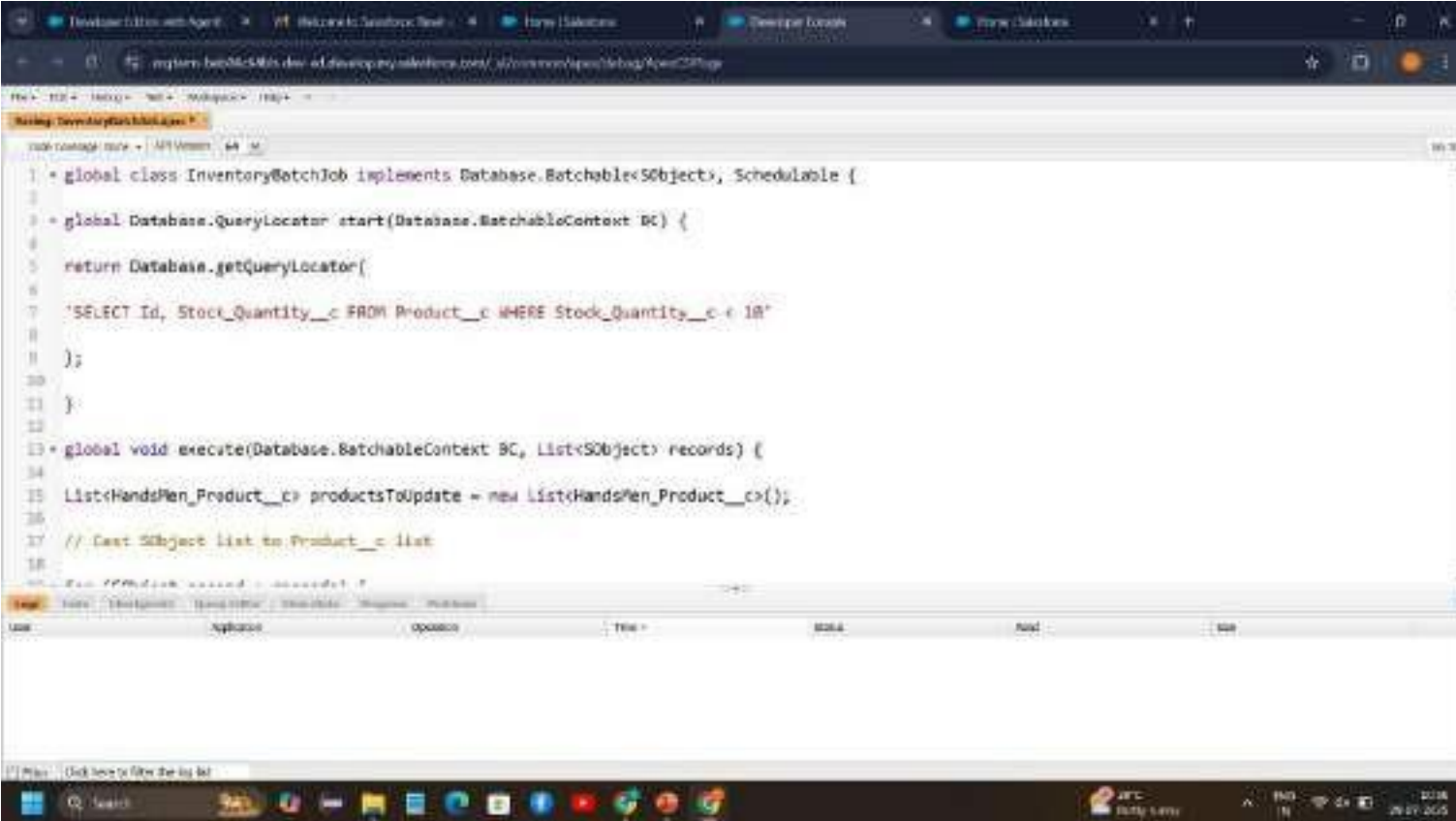
To create a new Apex Class follow the below steps:

Click on the file → New → Apex Class.

Give the Apex Class name as
“InventoryBatchJob”.

Click ok.

Now write the code logic here



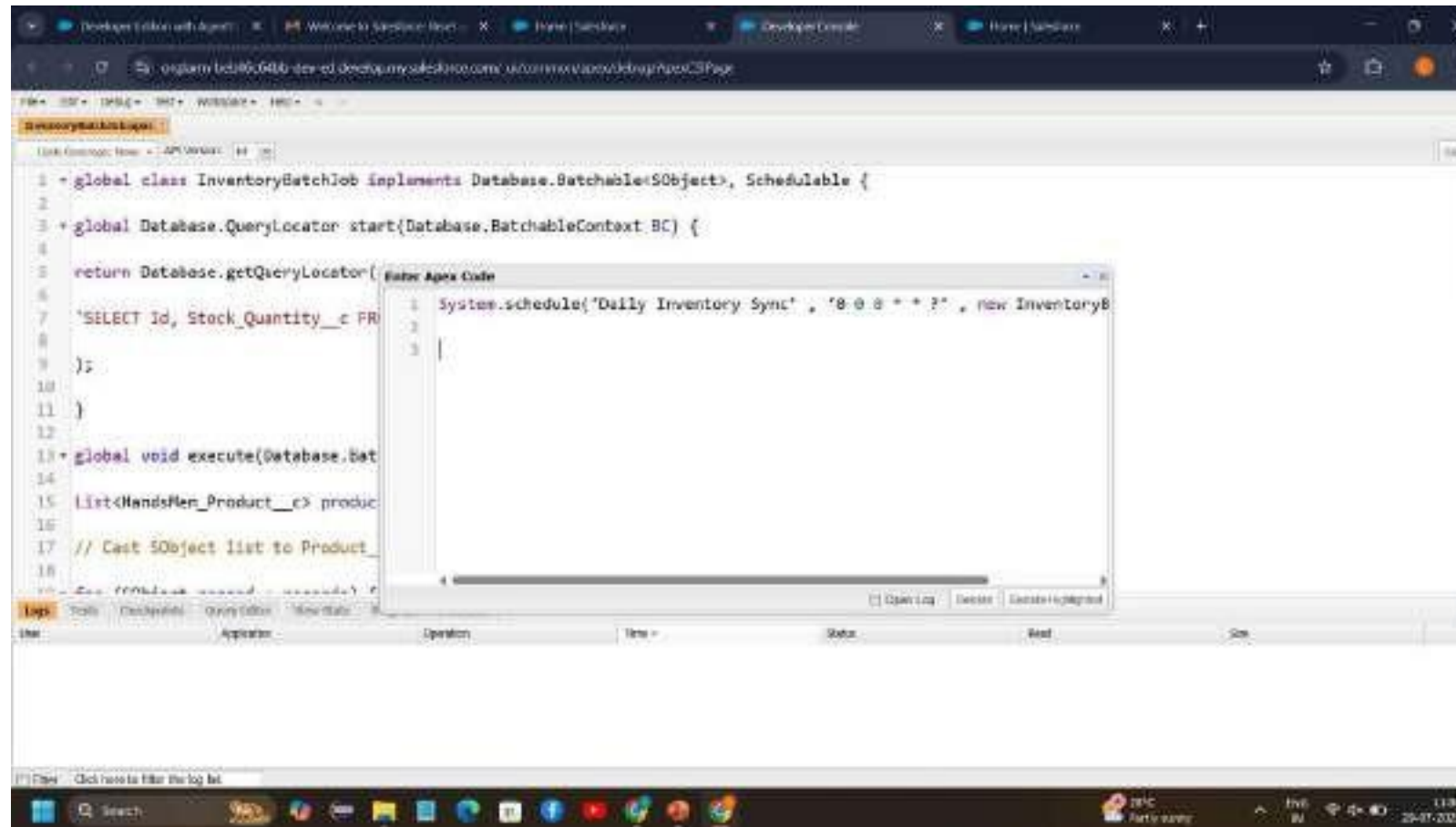
```
1 * global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {  
2  
3 * global Database.QueryLocator start(Database.BatchableContext BC) {  
4  
5     return Database.getQueryLocator(  
6  
7         'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 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  
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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