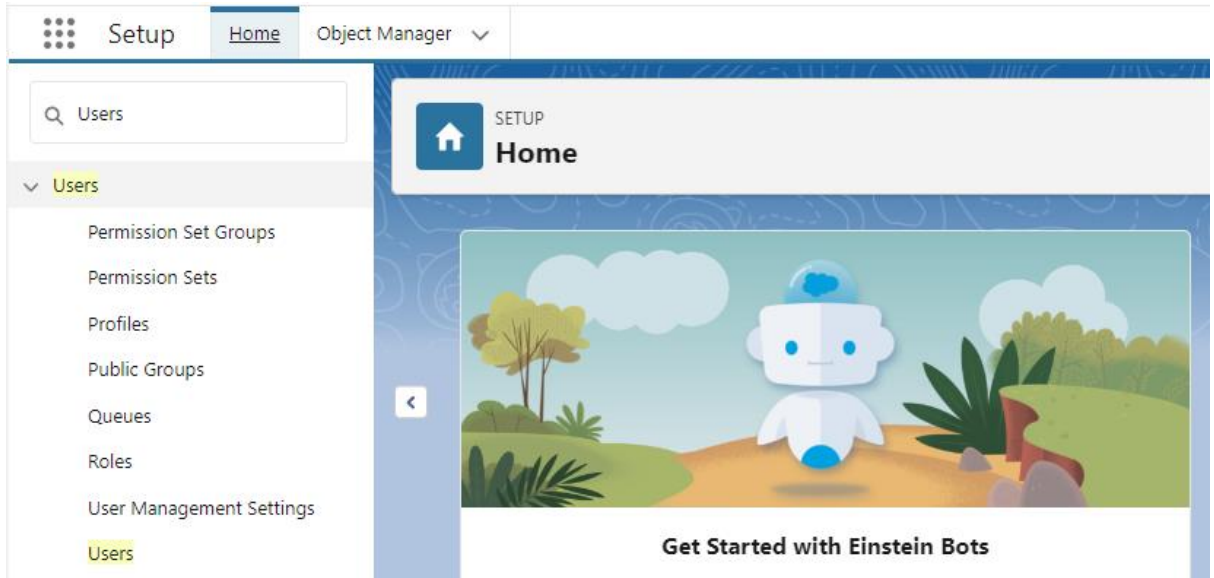


User Guide

Permission Set assignment

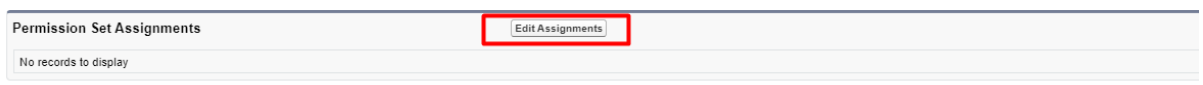
After the Handwrytten App is installed, Handwrytten Permissions should be assigned to the user. Permission set can be assigned:

1. to a single user from the user detail page.
 - 1.1 From Setup, in the Quick Find box, enter Users, and then select Users.

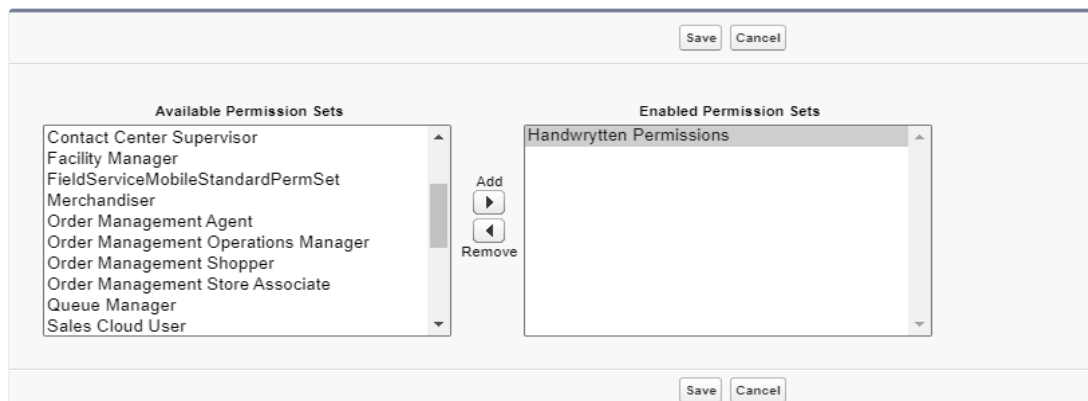


- 1.2 Select a user.

- 1.3 In the Permission Set Assignments related list, click Edit Assignments.



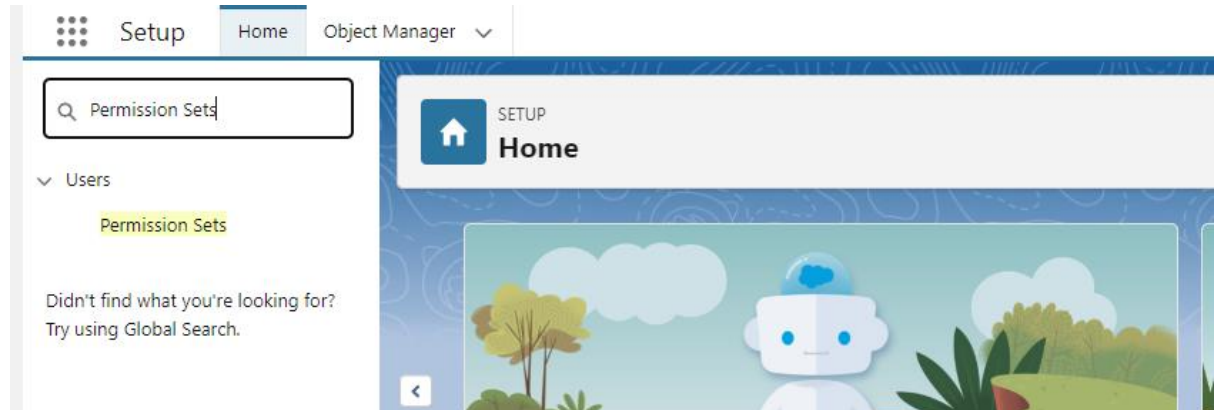
- 1.4 To assign a permission set, select it under Available Permission Sets and click Add.



- 1.5 Click Save.

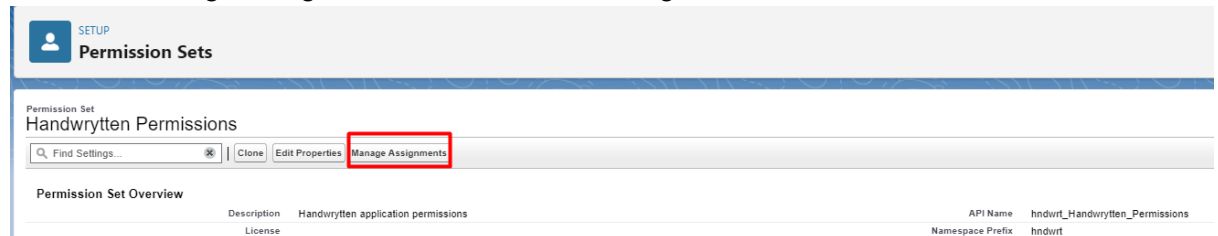
2. to multiple users from any permission set page.

2.1 From Setup, in the Quick Find box, enter Permission Sets, and then click Permission Sets.



2.2 Select the Handwrytten Permissions permission set.

2.3 Click Manage Assignments and then Add Assignments.

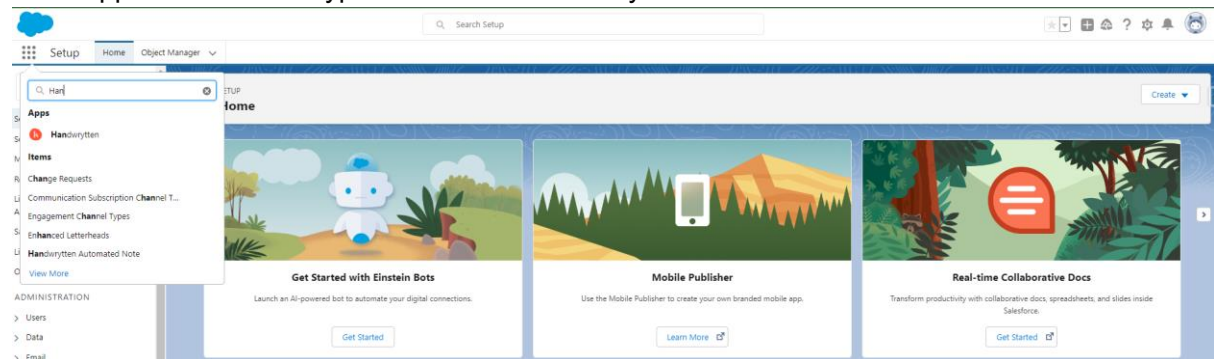


2.4 Select the checkboxes next to the names of the users you want assigned to the permission set, and click Next.

2.5 Click Assign.

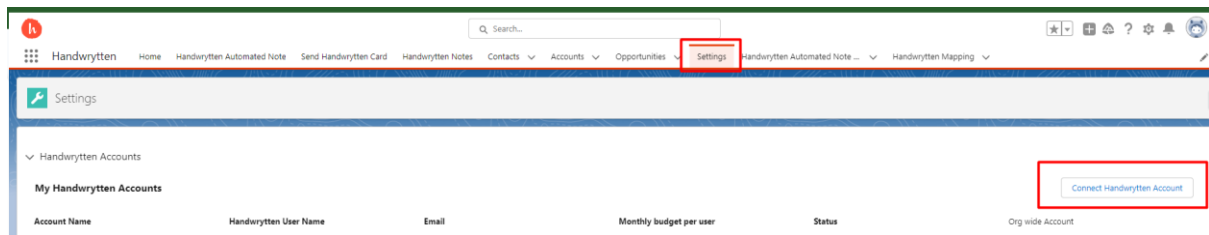
Application

Click App Launcher and type in Find Box 'Handwrytten'

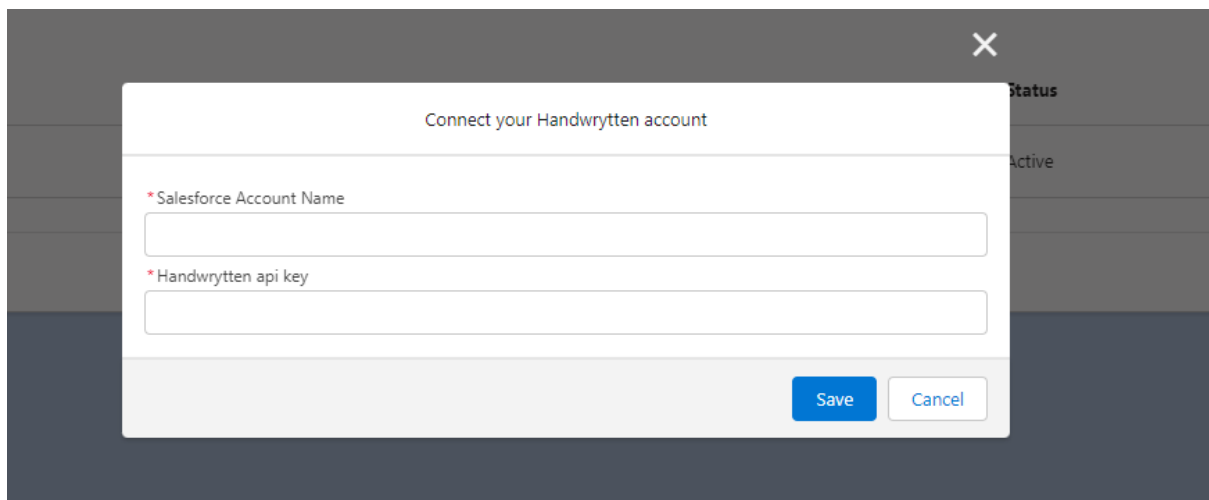


Connect Handwrytten Account.

1. Click the Settings tab and click the 'Connect Handwrytten Account' button.



2. In the modal window enter Account name and Handwrytten API Key.



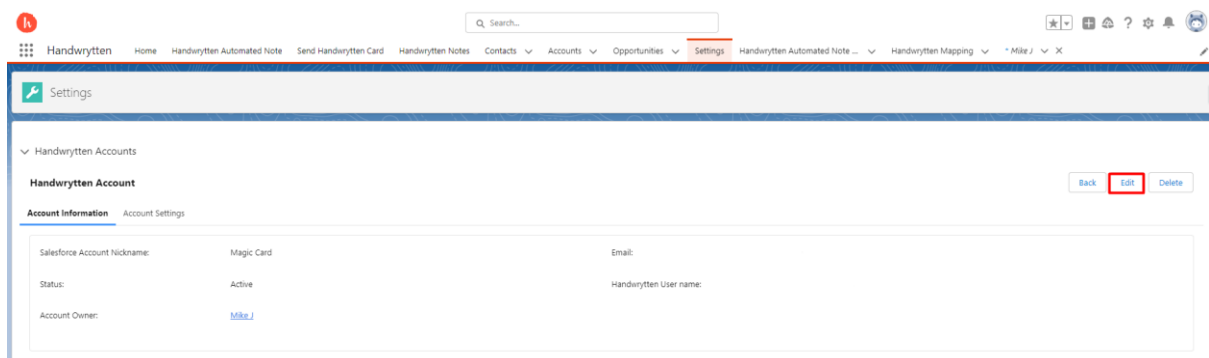
Handwrytten API Key can be found in the Integration tab in User settings on <https://app.handwrytten.com/>.

3. Click Save.

Edit Handwrytten Account

Click the Settings tab. Select an Account.

To Edit Account information click the Edit button.



We can deactivate Account and change Account Name.

Handwrytten Settings

Handwrytten Accounts

Handwrytten Account

Account Information Account Settings

Salesforce Account Nickname: Magic Card

Status: Active

Account Owner: Mike J

Save Cancel

Click the Save button.

Account settings tab

1. **Org Wide Account.** If checked, the account is visible to all users in Salesforce org who have access to the app. All users can send notes from this account.
2. **Monthly Budget Per User.** Defines monthly budget for users who will be sending notes from the account for the current month. If a user reaches the limit he can no longer send notes from the account in the current month.
3. **Allow Deletes.** If checked, users can delete notes created from the account.
4. **Log to Activity History.** If checked, a task is created under the recipient object (Contact, Account, Opportunity) each time, when Handwrytten note is successfully sent from the account.
5. **Notify Owner On Error.** If checked, the Handwrytten account owner is notified via email each time when an error occurs during sending a note to the Handwrytten server.
6. **Allow Gift Cards.** If checked, users who don't own the account but have access to it through the Org Wide Account option have access to Gift Card functionality.
7. **Approval Required.** If checked, users who don't own the account but have access to it through the Org Wide Account option cannot directly send their notes to the Handwrytten server but need to send a note for approval to Handwrytten account owner.

Settings

Handwrytten Accounts

Handwrytten Account

Back Edit Delete

Account Information Account Settings

Org Wide Account

Monthly Budget Per User \$3000

Org Wide:

Allow Deletes

Allow Gift Cards

Log to Activity History

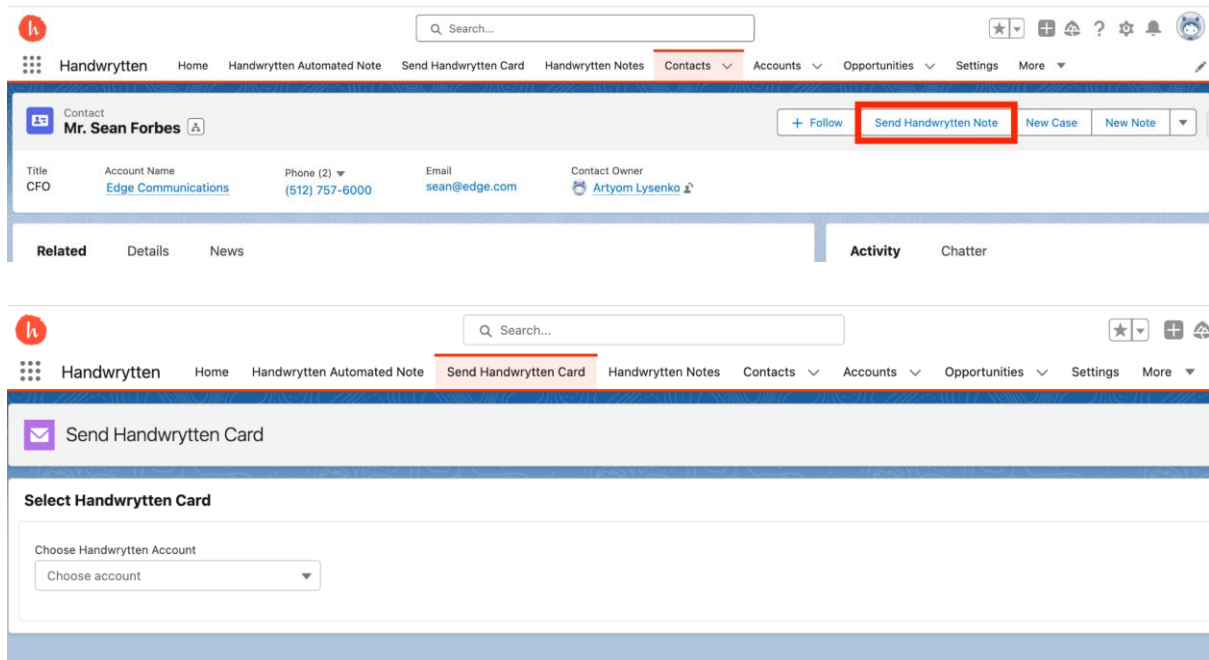
Approval Required

Notify Owner On Error

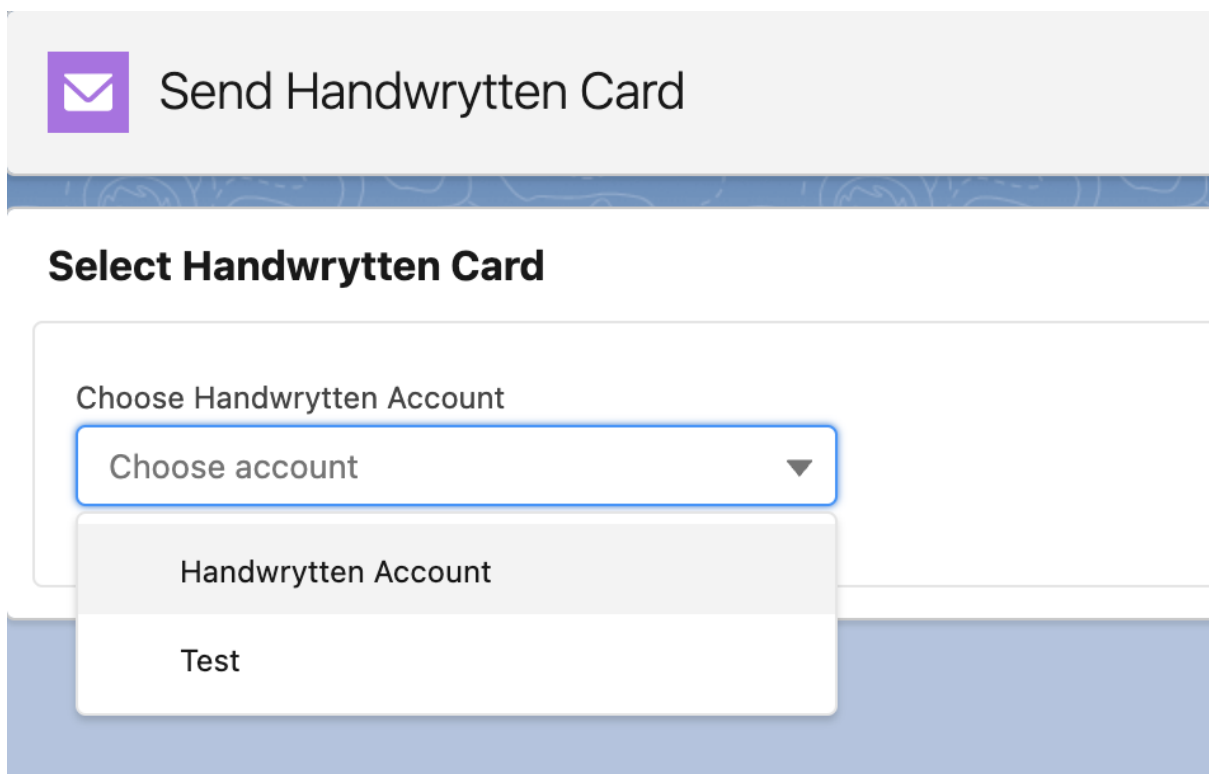
Main flow.

To send Handwrytten note manually you can either use 'Send Handwrytten Card' tab in Handwrytten application, or click 'Send Handwrytten Note' button on one of the available recipient objects which are Contact, Account and Opportunity. If you don't see the 'Send

Handwrytten Note' button on the layout, you will need to add the button on page layout of the recipient object.



In the main screen you can choose one of the available accounts to proceed.



After you have chosen the account you can choose the card category and choose the recipient. Opportunity \ Account recipients are searched by Name field, Contact recipients are searched by Name, Email fields.

Handwrytten

Home Handwrytten Automated Note **Send Handwritten Card** Handwrytten Notes Contacts Accounts Opportunities Settings More

Send Handwritten Card

Account Name: Handwrytten Account
Monthly Spent For This Account By Note Owner: \$4361.99

Select Handwritten Card [Back to Choose Account](#)

Choose card category
Choose card category

Choose recipient
Search...

After you have selected the Card Category and the recipient, you can choose a card that you like and click 'Send'.

Handwrytten

Home Handwrytten Automated Note **Send Handwritten Card** Handwrytten Notes Contacts Accounts Opportunities Settings More

Select Handwritten Card [Back to Choose Account](#)

Choose card category
Everyday

Choose recipient
Search...

Jane Grey
jane_gray@uoa.edu

Just A Note \$3.75

Best Friends \$3.75

Hello Sunshine \$3.75

Llama Party \$3.75

SEND SEND SEND SEND

In the 'Send Handwritten Note' interface you can set up sender / recipient address info, message info, gift card, credit card, insert information.

Address info. Here you can put sender and recipient info for a Handwrytten card.

Send Handwrytten Note

Back to card selection

Address info

Sender First Name

Sender First Name-2

Sender Last Name

Sender Last Name-2

Sender Business Name

Sender Business Name-2

Sender Address

Central-2

Sender Address Line 2

Sender Address Line 2-3

Sender City

Warsaw-2

Sender State or Province

Sender State or Province-2

Sender Postal Code

222

Sender Country

Poland-2

Recipient First Name

Jane

Recipient Last Name

Grey

Recipient Business Name

University of Arizona

Recipient Address

888 N Euclid Hallis Center, Room 501Tucson, A

Recipient Address Line 2

Recipient City

Recipient State or Province

Recipient Postal Code

Recipient Country

USA

Selected card. Here you can view selected card info.

Send Handwrytten Note

Back to card selection

Address info

Selected Card



Category: Everyday

Name: Llama Party

Description: Llama Party - Have a llama-zing time with our landscape everyday cards, robot-written for just \$3.75 each!

Price: **\$3.75**

Message

Gift card

Inserts

Credit card

Save

Message. Here you can create a message for your Handwrytten note. You can load messages from Handwrytten templates, create new templates, use merge fields, attach a signature and choose writing style for your message.

Send Handwrytten Note

[Back to card selection](#)

> Address info

> Selected Card

> Message

[Load Message From Template](#)

[Save Message As Template](#)

Object name

Contact

Contact fields

Contact fields

Merge field value

Merge field value

[Insert](#)

Choose writing style:

Ambitious Anita

Write your message here...

0 / 500 Characters

Insert Signature

Select Signature

Optional Name or Signature

0 / 50 Characters

Gift card. Here you can choose any of the available gift cards for your Handwrytten card.



Q Search...



Handwrytten

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Handwrytten Automated Note

Send Handwrytten Card

Handwrytten Notes

Contacts

Accounts

Opportunities

Settings

More

Send Handwrytten Note

[Back to card selection](#)

> Address info

> Selected Card

> Message

> Gift card

Select Gift Card Category

Starbucks Gift Card

Nominal : \$5.00
Price : \$7.95



[SELECT](#)

Nominal : \$25.00
Price : \$29.95



[SELECT](#)

Nominal : \$10.00
Price : \$12.95



[SELECT](#)

Nominal : \$20.00
Price : \$24.95



[SELECT](#)

Inserts. Here you can choose an insert for your Handwrytten card.



★

+

🔍

?

⚙️

🔔

👤

Handwrytten

Home

Handwrytten Automated Note

Send Handwrytten Card

Handwrytten Notes

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Opportunities

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More

✉️

 Send Handwrytten Card

Account Name: Handwrytten Account
Monthly Spent For This Account By Note Owner: \$4361.99

Send Handwrytten Note

Back to card selection

> Address info

> Selected Card

> Message

> Gift card

▼ Inserts

Select Insert
Business Card

> Credit card

Save

Credit card. Here you can choose one of the credit cards, available for your Handwrytten account.



★

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🔍

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⚙️

🔔

👤

Handwrytten

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Handwrytten Automated Note

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More

✉️

 Send Handwrytten Card

Account Name: Handwrytten Account
Monthly Spent For This Account By Note Owner: \$4361.99

Send Handwrytten Note

Back to card selection

> Address info

> Selected Card

> Message

> Gift card

> Inserts

▼ Credit card

Select Credit Card
Credit Card

None
XXXX1008
XXXX6556

Save

Once you fill all the info, click **‘Save’**.

Once a note is saved you can view note info, you can edit note and delete it.

Handwrytten Note Detail

Process Order

Edit

Delete

Note: **Hndwrt-00002071**

Card: \$3.75

Owner: **Artyom Lysenko**

Gift Card: \$7.95

Handwrytten Account: **Handwrytten Account**

Subtotal: \$11.70

Status: Error

Postage: \$0.63

Order sent date: 2023-06-20

Total: **\$12.33**

Status message: unf Error sending note: Error sending basket:
{\"status\":\"error\",\"httpCode\":400,\"message\":\"Please select a credit card and try again.\"}

Possible errors are:

1. {"status":"error","httpCode":400,"message":"Please select a credit card and try again."}. You probably forgot to select a credit card. Click 'Edit' and check the 'Credit card' section.
2. {"status":"error","httpCode":400,"message":"Can't get transaction id with card payment."}. Credit card is chosen but unable to withdraw money. Possible reasons are: not enough money on a credit card, credit card is not valid. To resolve the issue, check your credit card and connect Handwrytten support.

Bulk send note.

To send a bulk note, go to the list view of any of the recipient objects (Contact, Account, Opportunity) and click the 'Send Bulk Handwrytten Notes' list view button. If the button is not visible on the list view layout, go to 'Setup' -> 'Object Manager' -> Contact / Account / Opportunity -> List View Button Layout -> Edit -> take the 'Send Bulk Handwrytten Notes' button from available buttons and add it to the 'Selected Buttons' section -> click 'Save'

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is: **Setup** > **OBJECT MANAGER** > **Contact**. The left sidebar contains a list of setup categories, with 'List View Button Layout' selected. The main content area is titled 'List View Button Layout' and shows '1 Items, Sorted by Layout'. A table displays the configuration for the 'List View' layout:

LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED
List View	N/A	Open in Quip, New From Document, New, Add to Campaign, Clean, Import, Add to Campaign, Add to Call List, Send List Email, Send Message, Printable View, Send Bulk Handwrytten Notes

Below the table, there are 'Edit' buttons for each row. The 'Send Bulk Handwrytten Notes' button is visible in the 'BUTTONS DISPLAYED' column.




Setup

Home

Object Manager ▾


SETUP > OBJECT MANAGER
Contact

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
Hierarchy Columns
Scoping Rules
Triggers

☒ Add to Campaign [AddToCampaign]
☒ Clean [ListClean]
☒ Import [Import]
☒ Add to Campaign [MassAddToCampaign]
☒ Add to Call List [MassCreateCallList]
☒ Send List Email [SendListEmailAction]
☒ Send Message [SendBulkMessageAction]
☒ Printable View [PrintableListView]

Custom Buttons

Available Buttons

--None--

Add
Remove

Selected Buttons

Send Bulk Handwrytten Notes

Up
Down

List View Actions in Lightning Experience
[New Quick Action](#)

Save Cancel

After the button is added, go back to the list view, reload the page if necessary, choose several recipients (we do not recommend to choose more than 10 recipients at once) and click ‘Send Bulk Handwrytten Notes’ button.



★
+
🏠
?
⚙️
🔔
👤

Handwrytten
Home
Handwrytten Automated Note
Send Handwrytten Card
Handwrytten Notes
Contacts ▾
Accounts ▾
Opportunities ▾
Settings
More ▾

Contacts
Recently Viewed ▾

New Import Add to Campaign Send List Email **Send Bulk Handwrytten Notes**

4 Items selected
⚙️
🗑️
🔄
✎️
🔍

	Name ▾	Account Name ▾	Account Site ▾	Phone ▾	Email ▾	Contact Owner Alias ▾
1	☒ Sean Forbes	Edge Communications		(512) 757-6000	sean@edge.com	Alyse ▾
2	☒ Edna Frank	GenePoint		(650) 867-3450	efrank@genepoint.com	Alyse ▾
3	☒ Jack Rogers	Burlington Textiles Corp o...		(336) 222-7000	jrogers@burlington.com	Alyse ▾
4	☒ Jane Grey	University of Arizona		(520) 773-9050	jane_gray@uoa.edu	Alyse ▾

After records are selected, choose the recipient address type.



Handwrytten

Home

Handwrytten Automated Note

Send Handwrytten Card

Ha

You selected 4 records

Choose address type

Select Recipient Address Type ▼

Validate Addresses

Contact Mailing Address

Contact Other Address

Account Billing Address

Account Shipping Address

Select Contact Standard Fields

Once selected address type, click 'Validate Address'. If some addresses are invalid, you will see recipients, whose addresses are invalid. You can go to those recipients and fix their addresses or you can proceed without them. Address validity is checked by the following criteria: if address type is standard salesforce address field, all address fields must be filled to proceed.

Mailing Address



Mailing Street

312 Constitution Place

Mailing Zip/Postal Code

12345

Mailing City

Austin

Mailing State/Province

NY

Mailing Country

USA

If address type is custom mapping, Recipient First Name, Recipient Address, Recipient City, Recipient Postal Code, Recipient Country fields are mandatory to proceed.

×

Create Mapping

Mapping name

Mailing Zip/Postal Code

Recipient Business Name

First Name

* Recipient First Name

First Name

Recipient Last Name

First Name

* Recipient Address

Mailing State/Province

Recipient Address Line 2

Mailing State/Province

* Recipient City

Mailing City

Recipient State or Province

Mailing State/Province

* Recipient Postal Code

Mailing Zip/Postal Code

* Recipient Country

Mailing Country

Save

Cancel

Once you validate addresses, click 'Continue'.

h

Search...

Handwrytten

Home

Handwrytten Automated Note

Send Handwrytten Card

Handwrytten Notes

You selected 4 records

Choose address type

Contact Mailing Address

Validate Addresses

Not valid address for these recipients: [Jane Grey](#), [Edna Frank](#),

Want to continue without **Jane Grey**, **Edna Frank**?

Continue

You are redirected to the 'Send Handwrytten Card' tab.

Handwrytten

Home Handwrytten Automated Note **Send Handwrytten Card** Handwrytten Notes Contacts Accounts Opportunities Settings More

Send Handwrytten Card

Select Handwrytten Card

Choose Handwrytten Account

Choose account

The flow is the same as the flow for a single note except 'Address info' section where you can choose only sender address info. Recipient address info will be added automatically depending on the recipient address type chosen on the previous step.

Handwrytten

Home Handwrytten Automated Note **Send Handwrytten Card** Handwrytten Notes Contacts Accounts Opportunities Settings More

Send Handwrytten Note

Selected 2 recipients

Back to card selection

Address info

Sender First Name Sender First Name-2

Sender Last Name Sender Last Name-2

Sender Business Name Sender Business Name-2

Sender Address Central-2

Sender Address Line 2 Sender Address Line 2-3

Sender City Warsaw-2

Sender State or Province Sender State or Province-2

Sender Postal Code 222

Sender Country Poland-2

Once you fill all the note info, click 'Save' and you are redirected to the note view page. Processing, editing, and deleting bulk orders works the same way as regular orders.

Handwrytten

Home Handwrytten Automated Note **Send Handwrytten Card** Handwrytten Notes Contacts Accounts Opportunities Settings More

Handwrytten Note Detail

Process Order Edit Delete

Bulk Note

Selected 2 recipients: Sean Forbes Jack Rogers

Recipient object type Contact

Recipient address type: MailingAddress

Note: Hndwrt-00002073

Owner: Artyom Lysenko

Handwrytten Account: Handwrytten Account

Status: In-Progress

Card: \$3.75

Subtotal: \$3.75

Postage: (Calculated separately for each recipient)

Total: \$8.76

Address info

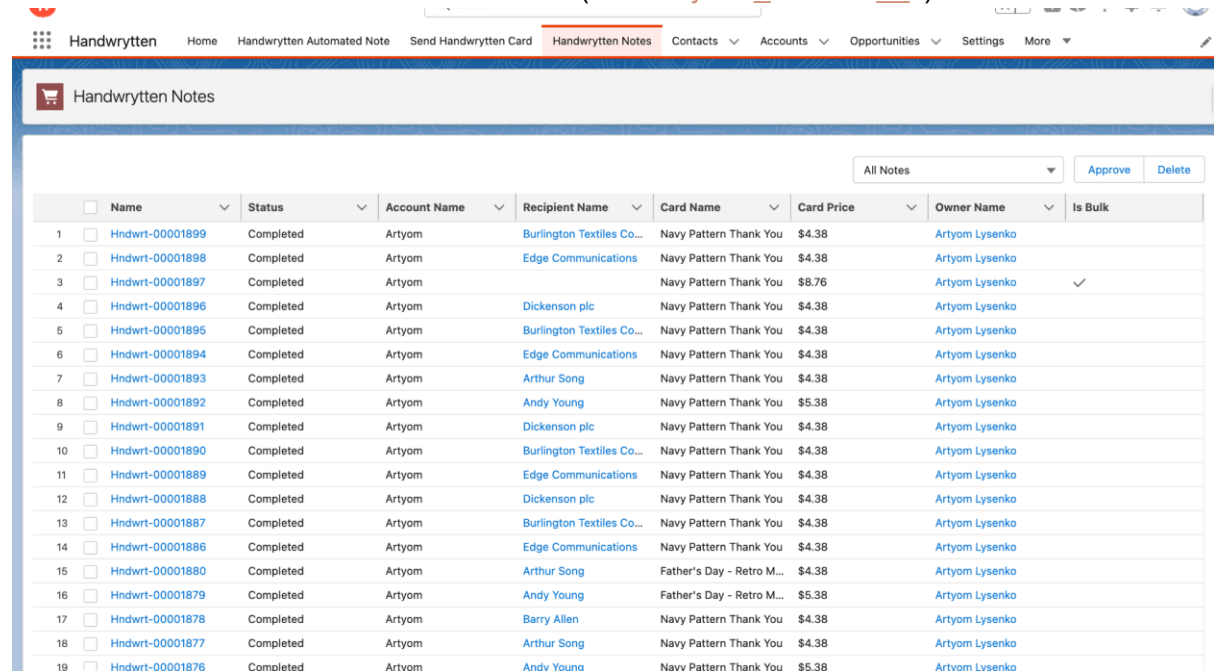
Sender Name Sender First Name-2 Sender Last Name-2

Sender City Warsaw-2

Approval procedure

Handwrytten Notes Tab

On this tab user can see notes that this user created and other users notes where current user was chosen as Account Name (**Handwrytten_Account__c**)



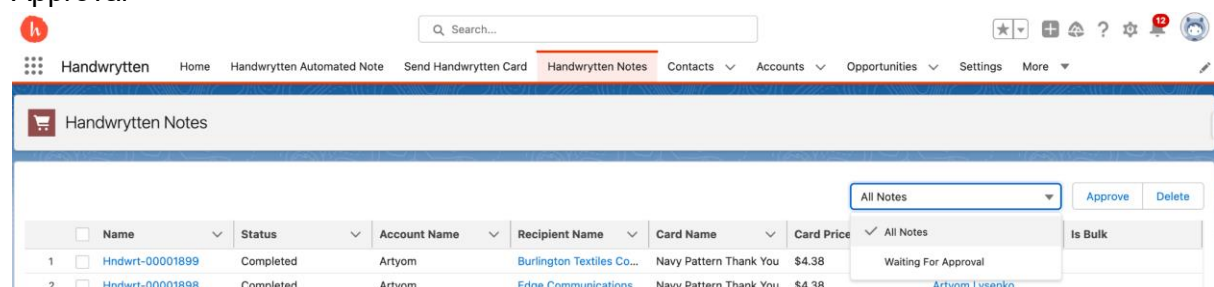
	Name	Status	Account Name	Recipient Name	Card Name	Card Price	Owner Name	Is Bulk
1	Hndwrt-00001899	Completed	Artyom	Burlington Textiles Co...	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
2	Hndwrt-00001898	Completed	Artyom	Edge Communications	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
3	Hndwrt-00001897	Completed	Artyom		Navy Pattern Thank You	\$8.76	Artyom Lysenko	✓
4	Hndwrt-00001896	Completed	Artyom	Dickenson plc	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
5	Hndwrt-00001895	Completed	Artyom	Burlington Textiles Co...	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
6	Hndwrt-00001894	Completed	Artyom	Edge Communications	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
7	Hndwrt-00001893	Completed	Artyom	Arthur Song	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
8	Hndwrt-00001892	Completed	Artyom	Andy Young	Navy Pattern Thank You	\$5.38	Artyom Lysenko	
9	Hndwrt-00001891	Completed	Artyom	Dickenson plc	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
10	Hndwrt-00001890	Completed	Artyom	Burlington Textiles Co...	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
11	Hndwrt-00001889	Completed	Artyom	Edge Communications	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
12	Hndwrt-00001888	Completed	Artyom	Dickenson plc	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
13	Hndwrt-00001887	Completed	Artyom	Burlington Textiles Co...	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
14	Hndwrt-00001886	Completed	Artyom	Edge Communications	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
15	Hndwrt-00001880	Completed	Artyom	Arthur Song	Father's Day - Retro M...	\$4.38	Artyom Lysenko	
16	Hndwrt-00001879	Completed	Artyom	Andy Young	Father's Day - Retro M...	\$5.38	Artyom Lysenko	
17	Hndwrt-00001878	Completed	Artyom	Barry Allen	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
18	Hndwrt-00001877	Completed	Artyom	Arthur Song	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
19	Hndwrt-00001876	Completed	Artyom	Andy Young	Navy Pattern Thank You	\$5.38	Artyom Lysenko	

Users can choose a desired option to filter records.

The existing options are:

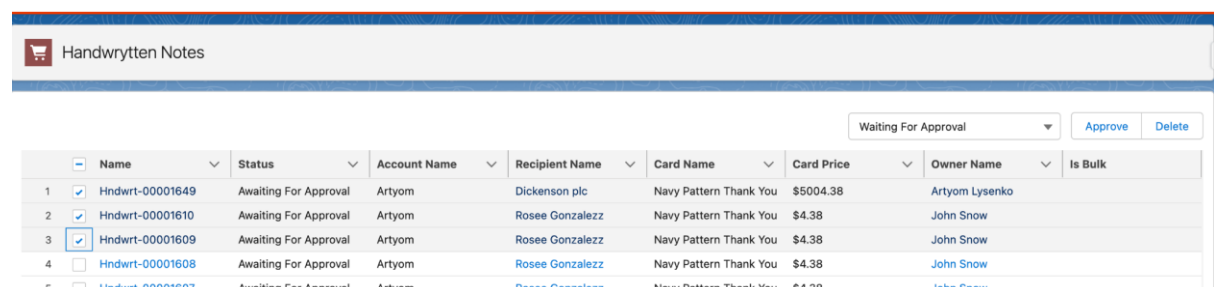
All Notes - display all existing notes

Waiting For Approval - display notes with Status (Status__c) = 'Awaiting For Approval'



	Name	Status	Account Name	Recipient Name	Card Name	Card Price	Owner Name	Is Bulk
1	Hndwrt-00001899	Completed	Artyom	Burlington Textiles Co...	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
2	Hndwrt-00001898	Completed	Artyom	Edge Communications	Navy Pattern Thank You	\$4.38	Artyom Lysenko	

Users can delete selected notes.



	Name	Status	Account Name	Recipient Name	Card Name	Card Price	Owner Name	Is Bulk
1	Hndwrt-00001649	Awaiting For Approval	Artyom	Dickenson plc	Navy Pattern Thank You	\$5004.38	Artyom Lysenko	
2	Hndwrt-00001610	Awaiting For Approval	Artyom	Rosee Gonzalez	Navy Pattern Thank You	\$4.38	John Snow	
3	Hndwrt-00001609	Awaiting For Approval	Artyom	Rosee Gonzalez	Navy Pattern Thank You	\$4.38	John Snow	
4	Hndwrt-00001608	Awaiting For Approval	Artyom	Rosee Gonzalez	Navy Pattern Thank You	\$4.38	John Snow	
5	Hndwrt-00001607	Awaiting For Approval	Artyom	Rosee Gonzalez	Navy Pattern Thank You	\$4.38	John Snow	

After success the user will receive a success notification.

The screenshot shows the Handwrytten application interface. At the top, there is a navigation bar with the Handwrytten logo and various menu items: Home, Handwrytten Automated Note, Send Handwrytten Card, Handwrytten Notes (selected), Contacts, Accounts, Opportunities, Settings, and More. A search bar is located next to the logo. Below the navigation bar, a green success notification banner reads: "Success Record(s) was (were) removed successfully". Below the banner, there is a table of notes. The table has columns: Name, Status, Account Name, Recipient Name, Card Name, Card Price, Owner Name, and Is Bulk. The table contains 5 rows of data, all with a status of "Awaiting For Approval".

	Name	Status	Account Name	Recipient Name	Card Name	Card Price	Owner Name	Is Bulk
1	Hndwrt-00001608	Awaiting For Approval	Artyom	Rosee Gonzalezz	Navy Pattern Thank You	\$4.38	John Snow	
2	Hndwrt-00001607	Awaiting For Approval	Artyom	Rosee Gonzalezz	Navy Pattern Thank You	\$4.38	John Snow	
3	Hndwrt-00001606	Awaiting For Approval	Artyom	Rosee Gonzalezz	Navy Pattern Thank You	\$4.38	John Snow	
4	Hndwrt-00001605	Awaiting For Approval	Artyom	Rosee Gonzalezz	Navy Pattern Thank You	\$4.38	John Snow	
5	Hndwrt-00001604	Awaiting For Approval	Artyom	Rosee Gonzalezz	Navy Pattern Thank You	\$4.38	John Snow	

Users can't delete notes that were completed during the current month. In this case user will see an error notification message

The screenshot shows the Handwrytten application interface. At the top, there is a navigation bar with the Handwrytten logo and various menu items: Home, Handwrytten Automated Note, Send Handwrytten Card, Handwrytten Notes (selected), Contacts, Accounts, Opportunities, Settings, and More. A search bar is located next to the logo. Below the navigation bar, a red error notification banner reads: "Error You cannot delete Handwrytten note completed this month.". Below the banner, there is a table of notes. The table has columns: Name, Status, Account Name, Recipient Name, Card Name, Card Price, Owner Name, and Is Bulk. The table contains 5 rows of data, all with a status of "Completed".

	Name	Status	Account Name	Recipient Name	Card Name	Card Price	Owner Name	Is Bulk
1	Hndwrt-00001899	Completed	Artyom	Burlington Textiles Co...	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
2	Hndwrt-00001898	Completed	Artyom	Edge Communications	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
3	Hndwrt-00001897	Completed	Artyom		Navy Pattern Thank You	\$8.76	Artyom Lysenko	✓
4	Hndwrt-00001896	Completed	Artyom	Dickenson plc	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
5	Hndwrt-00001895	Completed	Artyom	Burlington Textiles Co...	Navy Pattern Thank You	\$4.38	Artyom Lysenko	

Users can approve records with status 'Awaiting For Approval'.

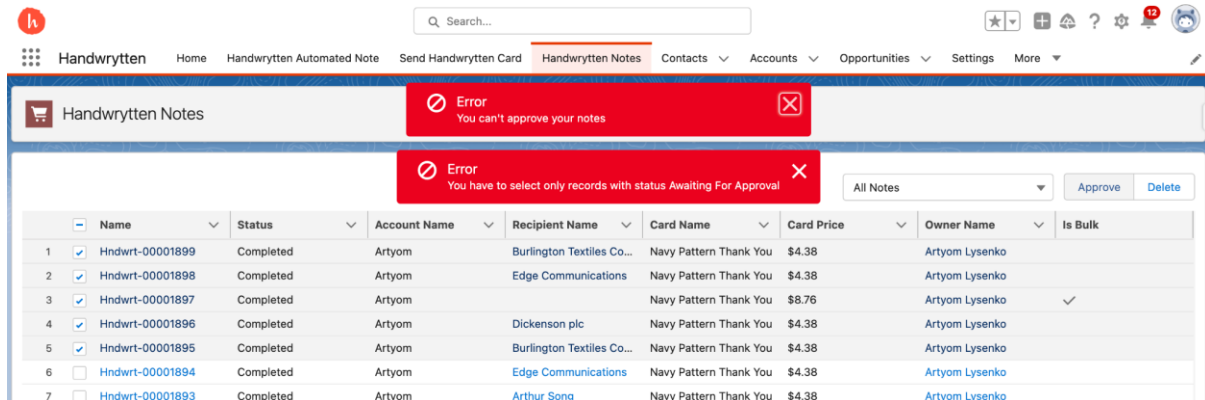
If the wrong records for approval were chosen you receive an error notification.

The screenshot shows the Handwrytten application interface. At the top, there is a navigation bar with the Handwrytten logo and various menu items: Home, Handwrytten Automated Note, Send Handwrytten Card, Handwrytten Notes (selected), Contacts, Accounts, Opportunities, Settings, and More. A search bar is located next to the logo. Below the navigation bar, a red error notification banner reads: "Error You have to select only records with status Awaiting For Approval". Below the banner, there is a table of notes. The table has columns: Name, Status, Account Name, Recipient Name, Card Name, Card Price, Owner Name, and Is Bulk. The table contains 14 rows of data, all with a status of "Completed".

	Name	Status	Account Name	Recipient Name	Card Name	Card Price	Owner Name	Is Bulk
90	Hndwrt-00001840	Completed	Artyom	Burlington Textiles Co...	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
91	Hndwrt-00001838	Completed	Artyom	Barry Allen	Navy Pattern Thank You	\$34.33	Artyom Lysenko	
92	Hndwrt-00001837	Completed	Artyom	Arthur Song	Navy Pattern Thank You	\$34.33	Artyom Lysenko	
93	Hndwrt-00001836	Completed	Artyom	Andy Young	Navy Pattern Thank You	\$35.33	Artyom Lysenko	
94	Hndwrt-00001839	Completed	Artyom	Edge Communications	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
95	Hndwrt-00001835	Completed	Artyom	Andy Young	Father's Day - Retro ...	\$5.38	Artyom Lysenko	
96	Hndwrt-00001834	Completed	Artyom	Dickenson plc	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
97	Hndwrt-00001832	Completed	Artyom	Dickenson plc	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
98	Hndwrt-00001831	Completed	Artyom	Burlington Textiles Co...	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
99	Hndwrt-00001830	Completed	Artyom	Edge Communications	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
100	Hndwrt-00001829	Completed	Artyom	Andy Young	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
101	Hndwrt-00001833	Completed	Artyom	Burlington Textiles Co...	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
102	Hndwrt-00001828	Completed	Artyom		Navy Pattern Thank You	\$4.38	John Snow	✓
103	Hndwrt-00001827	Completed	Artyom		Navy Pattern Thank You	\$4.38	John Snow	✓
104	Hndwrt-00001826	Completed	Artyom		Father's Day - Retro ...	\$13.14	John Snow	✓

Users can approve only others' notes (If `Handwrytten_Account__c` Owner is the current user.

Otherwise user sees an error



The screenshot shows the 'Handwrytten Notes' interface. At the top, there are two red error banners. The first says 'Error: You can't approve your notes'. The second says 'Error: You have to select only records with status Awaiting For Approval'. Below these is a table of notes. The table has columns: Name, Status, Account Name, Recipient Name, Card Name, Card Price, Owner Name, and Is Bulk. The first six rows are marked as 'Completed' and have a checkmark in the 'Is Bulk' column. The seventh row is marked as 'Completed' but has an 'X' in the 'Is Bulk' column, indicating it cannot be approved.

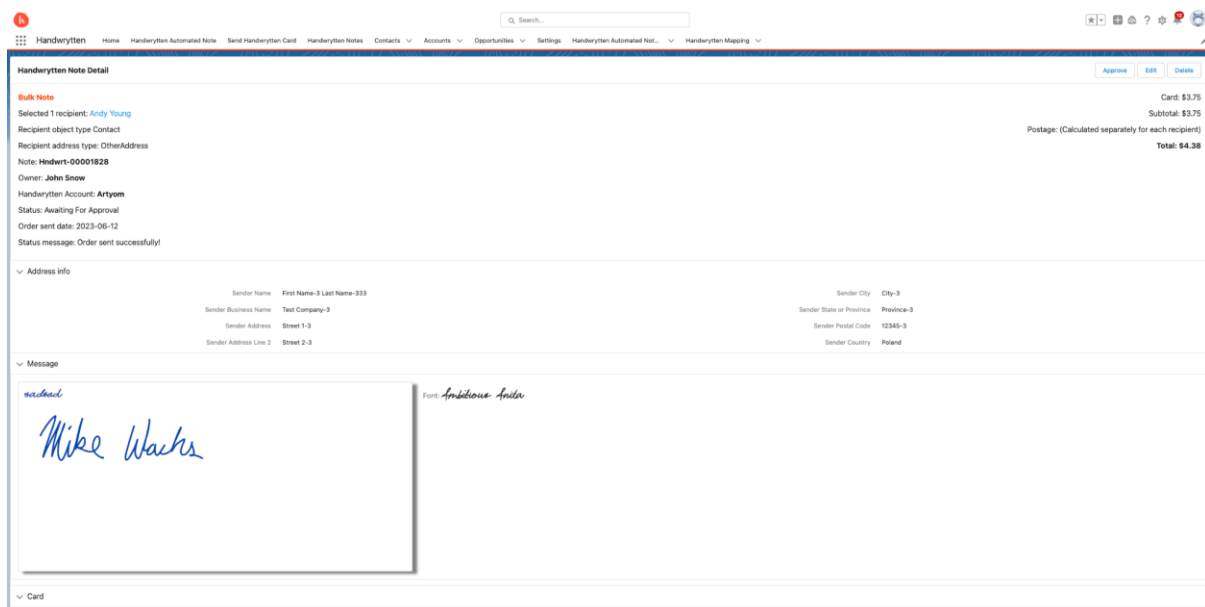
	Name	Status	Account Name	Recipient Name	Card Name	Card Price	Owner Name	Is Bulk
1	Hndwrt-00001899	Completed	Artyom	Burlington Textiles Co...	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
2	Hndwrt-00001898	Completed	Artyom	Edge Communications	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
3	Hndwrt-00001897	Completed	Artyom		Navy Pattern Thank You	\$8.76	Artyom Lysenko	✓
4	Hndwrt-00001896	Completed	Artyom	Dickenson plc	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
5	Hndwrt-00001895	Completed	Artyom	Burlington Textiles Co...	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
6	Hndwrt-00001894	Completed	Artyom	Edge Communications	Navy Pattern Thank You	\$4.38	Artyom Lysenko	
7	Hndwrt-00001893	Completed	Artyom	Arthur Song	Navy Pattern Thank You	\$4.38	Artyom Lysenko	

After success/error record approvals the user sees a notification with info about successes and errors.

If success - status updates to 'Completed' and status message changes to 'Order sent successfully!'

If error - status updates to 'Error' and status message updates to the reason for error.

Also user can approve a single record. For that user can click on the note name and then you will be redirected to a note detail page. The Approve button appears here



The screenshot shows the 'Handwrytten Note Detail' page. It displays information about a specific note, including the recipient's name (Andy Young), the note's status (Awaiting For Approval), and the order date (2023-06-12). The page also shows the sender's address and the card's details. A large image of the handwritten note is displayed, showing the name 'Mike Wachs' written in blue ink. The card's details include the card price (\$4.38), subtotal (\$3.75), and total (\$4.38).

Handwrytten Note Detail

Bulk Note

Selected 1 recipient: [Andy Young](#)

Recipient object type: Contact

Recipient address type: OtherAddress

Note: Hndwrt-00001828

Owner: John Snow

Handwrytten Account: Artyom

Status: Awaiting For Approval

Order sent date: 2023-06-12

Status message: Order sent successfully!

Address info

Sender Name: First Name-3 Last Name-323

Sender Business Name: Test Company-3

Sender Address: Street 1-3

Sender Address Line 2: Street 2-3

Sender City: City-3

Sender State or Province: Province-3

Sender Postal Code: 12345-3

Sender Country: Poland

Message

Handwritten: *Mike Wachs*

From: *Andrius Andrius*

Card

Card: \$3.75

Subtotal: \$3.75

Postage: (Calculated separately for each recipient)

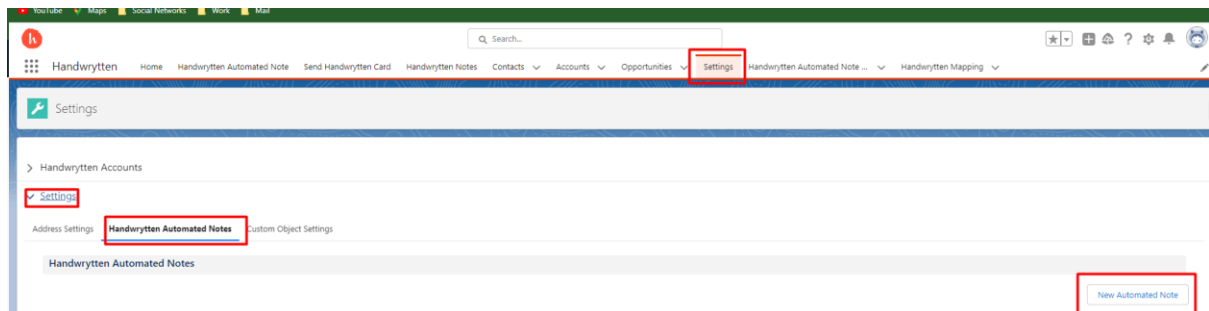
Total: \$4.38

After successful approval the user will receive a success message and status will be updated to 'Completed'.

If the user wants to approve a note with the chosen account owner himself, in this case instead of the approve button the user sees 'Process Order'.

Automated Note Template

To create a new Automated Note Template navigate to **Settings** tab, click on **Setting** section and select **Handwrytten Automated Note**. Click the **New Automated Note** button.



New Automated Note page is opened and contains five required fields.

A screenshot of the 'New Automated Note' form. The form is titled 'Handwrytten Automated Note' and contains the following fields: 'Automated Note Name' (required, text input), 'Handwrytten Account' (required, dropdown menu), 'Sender Default Address Type' (required, dropdown menu), 'Automated Note Type' (required, dropdown menu), and 'Recipient Address Type' (required, dropdown menu). There are 'Cancel' and 'Next' buttons at the bottom right.

Fill the following fields:

- Automated Note Name : **unique** Automated Note name;

A screenshot of the 'Automated Note' section of the form, showing the 'Automated Note Name' field (required, text input).

- Handwrytten Account: Handwrytten Account which will be associated with the Automated Note;

A screenshot of the 'Handwrytten Account' dropdown menu (required). The text 'Select Handwrytten Account' is displayed inside the dropdown.

- Automated Note Type;

A screenshot of a web application showing a dropdown menu for 'Automated Note Type'. The dropdown is open, displaying four options: 'Account', 'Contact', 'Lead', and 'Opportunity'. The dropdown is highlighted with a blue border. The label '* Automated Note Type' is visible above the dropdown.

- Sender Default Address Type;

A screenshot of a web application showing a dropdown menu for 'Sender Default Address Type'. The dropdown is open, displaying three options: 'Default Sender Address', 'Select Other User', and 'User Address'. The dropdown is highlighted with a blue border. The label '* Sender Default Address Type' is visible above the dropdown.

When the Default Sender Address option is selected, the user can select Sender Address from available address mapping.

A screenshot of a web application showing a dropdown menu for 'Sender Default Address Type'. The dropdown is open, displaying the option 'Default Sender Address'. The dropdown is highlighted with a blue border. The label '* Sender Default Address Type' is visible above the dropdown. To the right of the dropdown, there is a red box containing the text 'Default Sender Address' with a blue link.

In the pop-up window select the **Choose** option next to the mapping address you want to use.

A screenshot of a pop-up window titled 'Mappings'. The window has a close button (X) in the top right corner. There is a 'Create mapping' button in the top right. Below the title, there is a table with one row. The first column contains the text 'Mapping-2'. The second column contains a red box with the text 'choose'. The third column contains the text 'edit'. The fourth column contains the text 'delete'.

User can Edit or Delete address mapping.

- Recipient Address Type. The value of this field depends on Automated Note Type field value.

All fields are required and must be filled.

The screenshot shows the 'Handwrytten Automated Note' form. At the top, a red error banner reads 'Error: Please fill all required fields'. The form is divided into two main sections. The first section, 'Automated Note', contains a single text input field for 'Automated Note Name'. The second section, 'Handwrytten Account / Address Type', contains four dropdown menus: 'Handwrytten Account', 'Automated Note Type', 'Sender Default Address Type', and 'Recipient Address Type'. All four dropdown menus are currently empty and have a red border, indicating they are required fields. At the bottom of the form are 'Cancel' and 'Next' buttons.

When all fields are filled, click the Next button.

This screenshot shows the same form as the previous one, but with the required fields filled. The 'Automated Note Name' field contains the text 'Test Note'. The 'Handwrytten Account' dropdown is set to 'Handwrytten Account', 'Automated Note Type' is set to 'Account', 'Sender Default Address Type' is set to 'User Address', and 'Recipient Address Type' is set to 'Shipping Address'. The 'Next' button at the bottom right is now highlighted with a red box, indicating it is the next step to take.

All fields in the Account /Address type section are disabled. Click Back button to change fields values.

This screenshot shows the form with the 'Handwrytten Account / Address Type' section expanded. The four dropdown menus from the previous step are now disabled, indicated by a grey background and a downward arrow icon. Below this section, there are four expandable sections: 'Credit Cards', 'Return Address', 'Card Section', and 'Gift Card(optional)'. At the bottom of the form, the 'Back' button is highlighted with a red box, and the 'Save' button is also visible.

Credit Cards section Here you can choose one of the credit cards, available for your Handwrytten account.

▼ Credit Cards

Select Credit Card

Credit Card ▼

None

XXXX1008

XXXX6556

Return Address section.

▼ Return Address

* Sender First Name

Sender First Name

Sender Last Name

Sender Business Name

Company

* Sender Address

User Street

Sender Address Line 2

* Sender City

Gdansk

Sender State Or Province

GD

* Sender Postal Code

233223

* Sender Country

Poland

Card section. Here the user should select Card Category.

▼ Card Section

Select Card Category

Select Card Category ▼

- Favorites
- Father's Day
- Everyday
- Graduation
- Thank You
- Seasonal Holidays
- Birthday
- Invitations
- Encouragement

Then select a Card.

▼ Card Section

Select Card Category

Favorites ▼

Navy Pattern Thank You **\$3.75**



thank you

SELECT

Boho Thank You - Orange **\$3.75**



thank you

SELECT

Inserts section. The user can select available **Insert** for current Handwrytten Account. Section is not shown, if Handwrytten Account does not have Inserts.

Inserts

Select Insert

None

Business Card

Gift Card section. User can select a Gift card.

Gift Card(optional)

Select Gift Card Category

Target Gift Card

Nominal : \$25.00

Price : \$29.95



SELECT

Nominal : \$50.00

Price : \$54.95



SELECT

Nominal : \$100.00

Price : \$104.95



SELECT

Message section. Here you can create a message for your Handwrytten note. You can load messages from Handwrytten templates, create new templates, use merge fields, attach a signature and choose writing style for your message.

Once you fill all the info, click **Save** button

Edit/Delete Automated Note.

Navigate to the **Settings** tab, click on **the Settings** section.

- click Edit next to Automated Note you want to Edit;

Handwrytten Accounts

Settings

Address SettingsHandwrytten Automated NotesCustom Object Settings

Handwrytten Automated Notes

New Automated Note

ACTION	HANDWRITTEN AUTOMATED NOTE NAME	HANDWRITTEN ACCOUNT	CARD NAME	CARD PRICE	WRITE STYLE
EditDelete	Note 1	Magic Card	Have A Celestial Birthday	3.75 USD	hwAnita
EditDelete	Account Note 2	Handwrytten Account	Tassel Cap	3.25 USD	hwChase
EditDelete	Contact Note 7	Handwrytten Account	Boho Thank You - Orange	3.75 USD	hwAnita
EditDelete	Contact Note 6	Handwrytten Account	Boho Thank You - Orange	3.75 USD	hwAnita
EditDelete	Contact Note 5	Handwrytten Account	Boho Thank You - Orange	3.75 USD	hwJustin
EditDelete	Account Note 4	Magic Card	Make A Wish It's Your Birthday	3.75 USD	hwJennifer
EditDelete	Account Note 3	Handwrytten Account	Happy Conersary	3.75 USD	hwAnita

- click Delete next to Automated Note you want to Delete;

> Handwrytten Accounts

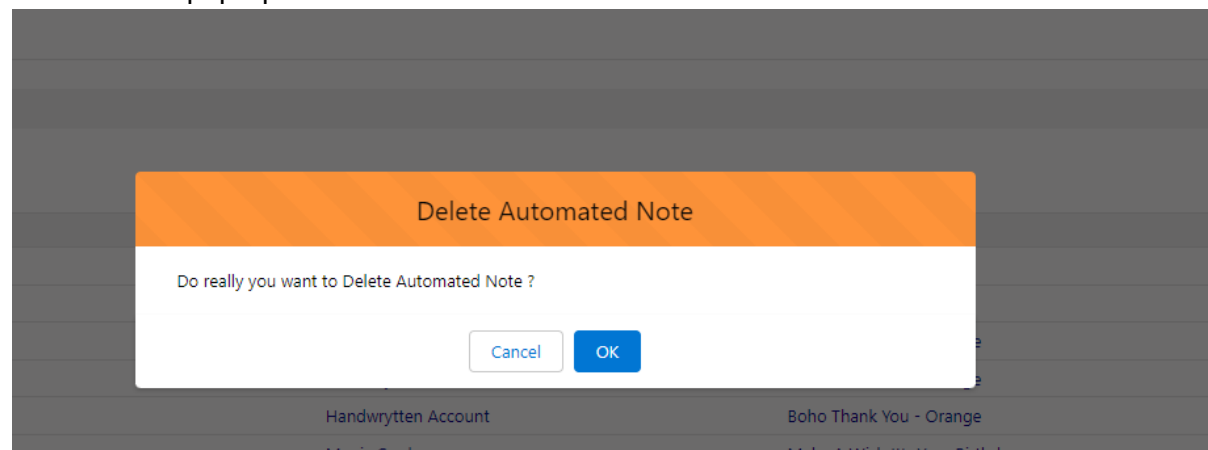
Settings

Address Settings **Handwrytten Automated Notes** Custom Object Settings

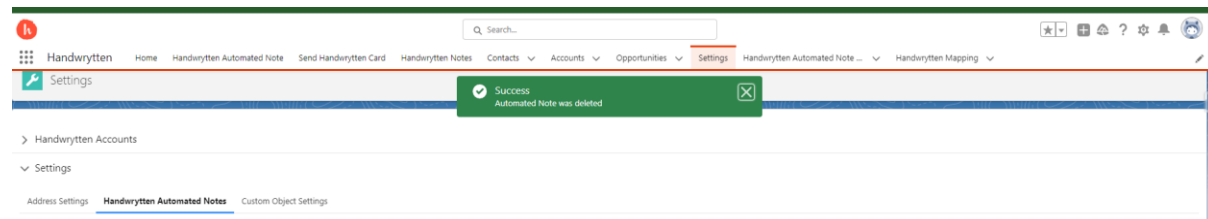
Handwrytten Automated Notes New Automated Note

ACTION	HANDWRITTEN AUTOMATED NOTE NAME	HANDWRITTEN ACCOUNT	CARD NAME	CARD PRICE	WRITE STYLE
Edit Delete	Note 1	Magic Card	Have A Celestial Birthday	3.75 USD	hswAnita
Edit Delete	Account Note 2	Handwrytten Account	Tassel Cap	3.25 USD	hswChase
Edit Delete	Contact Note 7	Handwrytten Account	Boho Thank You - Orange	3.75 USD	hswAnita
Edit Delete	Contact Note 6	Handwrytten Account	Boho Thank You - Orange	3.75 USD	hswAnita
Edit Delete	Contact Note 5	Handwrytten Account	Boho Thank You - Orange	3.75 USD	hswJustin
Edit Delete	Account Note 4	Magic Card	Make A Wish It's Your Birthday	3.75 USD	hswJennifer
Edit Delete	Account Note 3	Handwrytten Account	Happy Canversary	3.75 USD	hswAnita

Confirmation pop-up window is shown.



Confirm the removal.



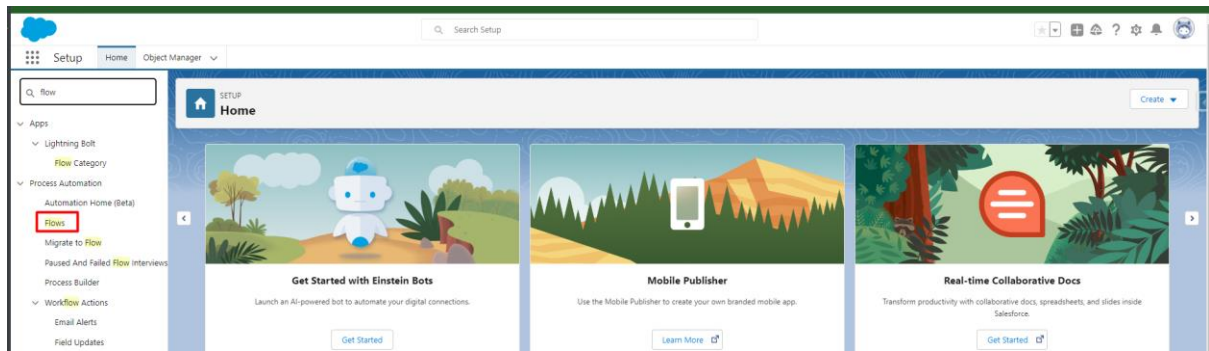
Handwrytten Automated Note Queue

Handwrytten Automated Note Queue records are used to automatically send the Handwrytten note to accounts, contacts or leads.

Handwrytten Automated Note Queue records can be created by Process Builder or Autolaunched Flow.

1. Autolaunched Flow.

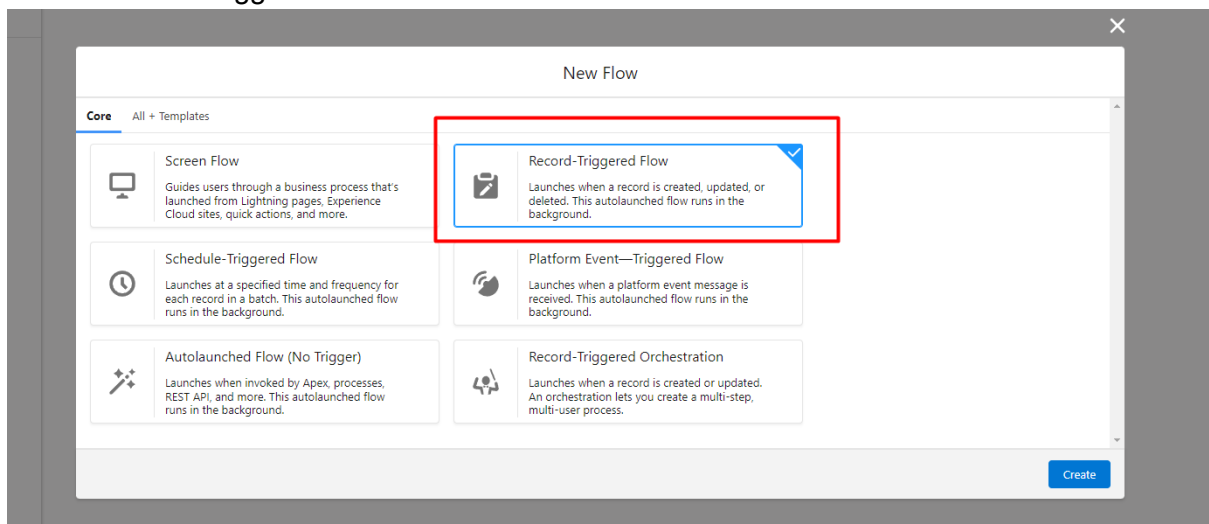
From Setup, in the Quick Find box, enter Flow, and then select Flows.



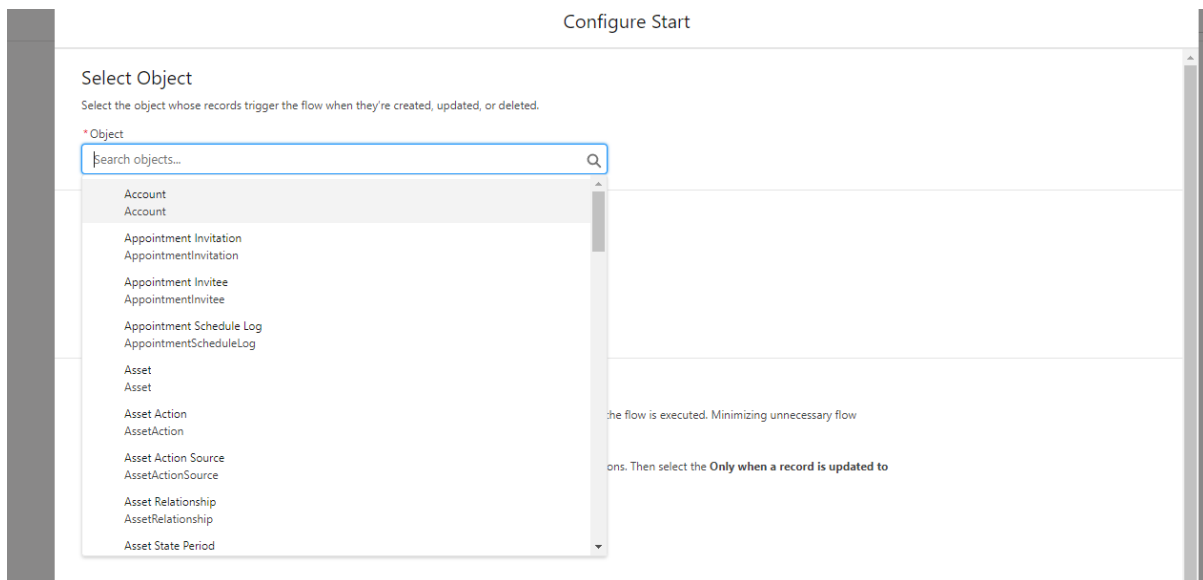
Click New Flow



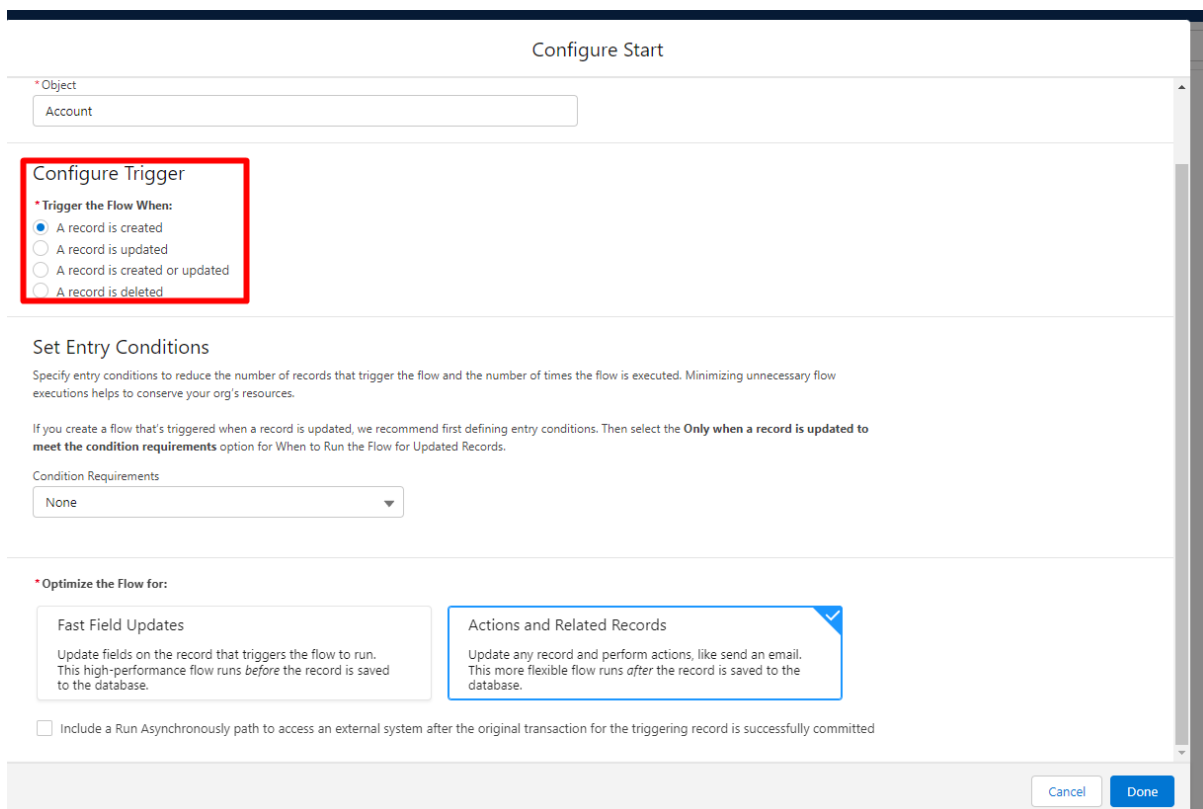
Select Record Triggered Flow



Select the triggered object in Object dropdown.

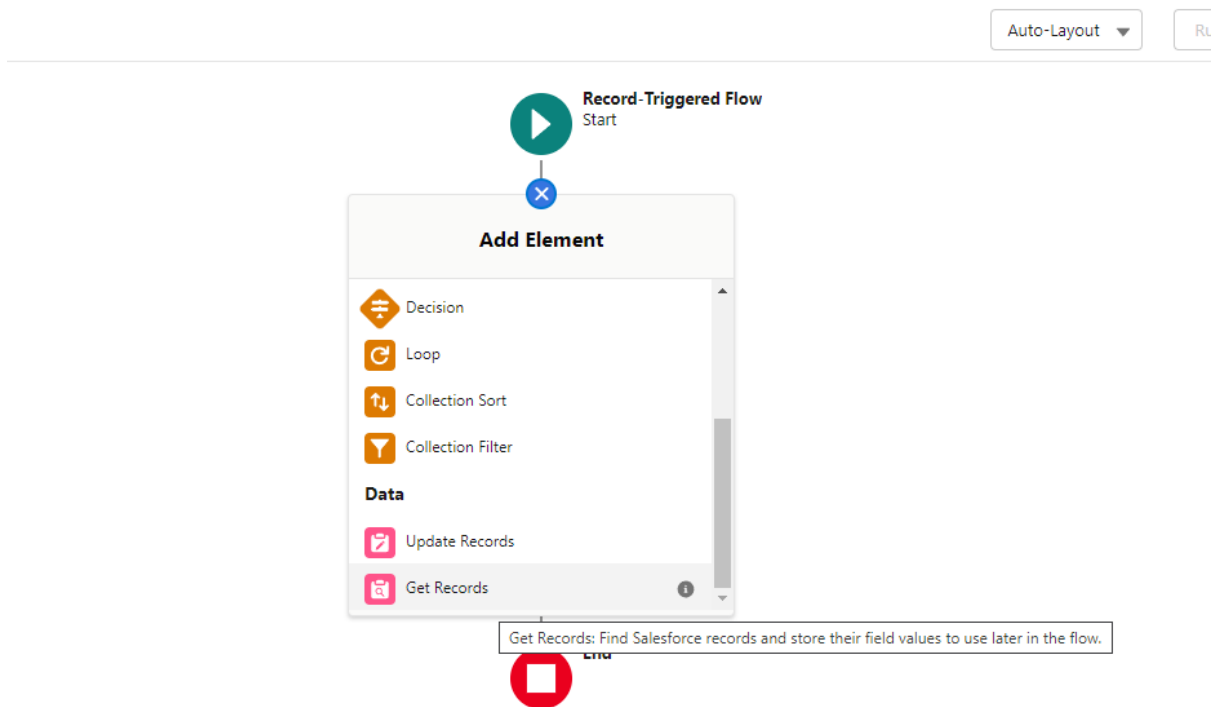


Select Trigger action.

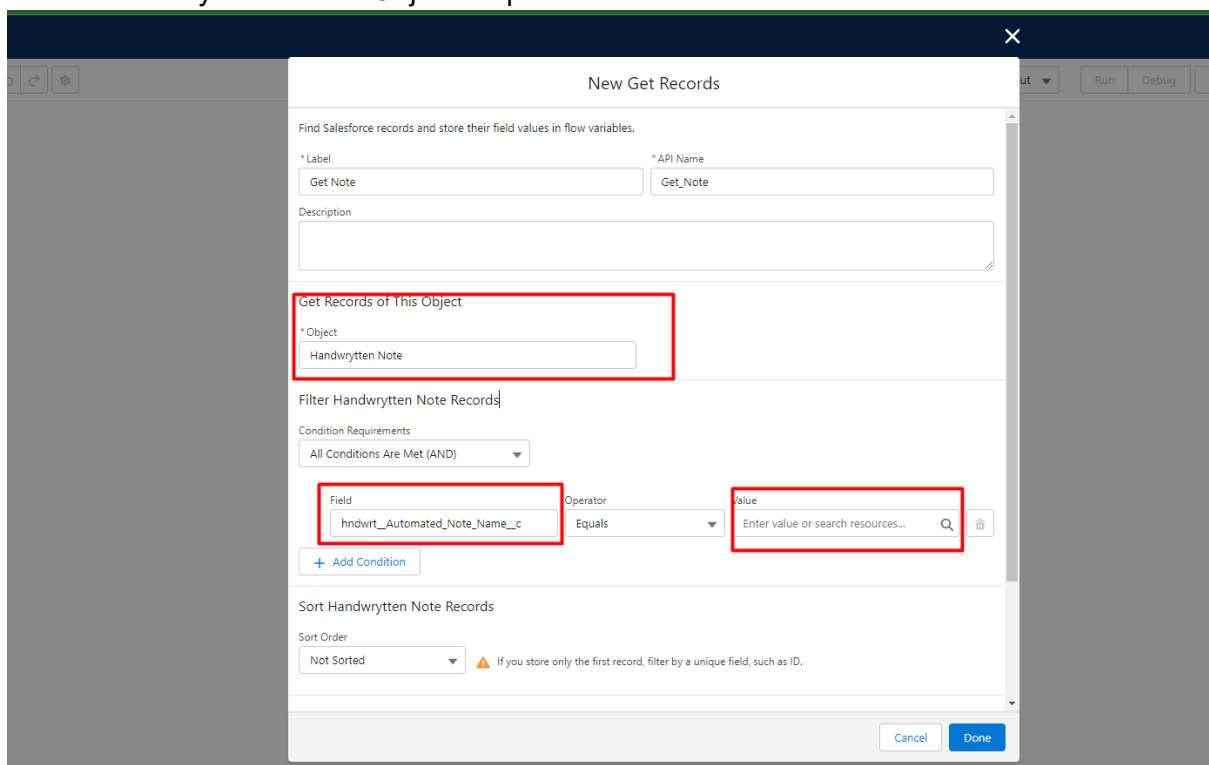


Click Done.

Add Get Records element to Flow.

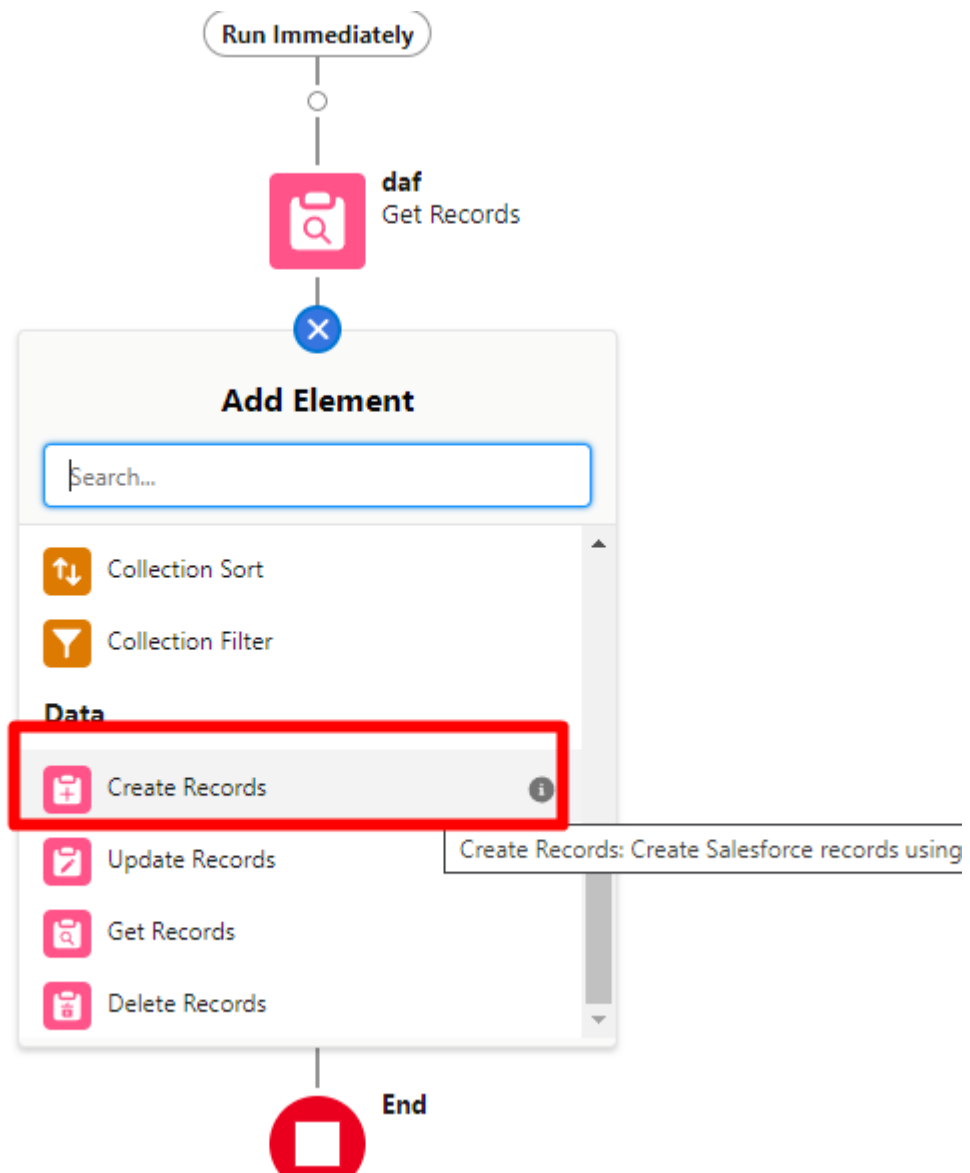


Select Handwrytten Note in Object dropdown



Select Automated Note Template Name in Field and type Automated Tempate Note name in Value field. Click Done.

Click Add element in Flow and Select Create Records.



Auto-Layout

Run

×

Edit Create Records

Create Salesforce records using values from the flow.

Create Queue record (Create_Queue_record) 

How Many Records to Create

☒ One

☐ Multiple

How to Set the Record Fields

☐ Use all values from a record

☒ Use separate resources, and literal values

Create a Record of This Object

* Object

Handwrytten Queue

Set Field Values for the Handwrytten Queue

Field

hndwrt_Account__c

←

Value

A

\$Record > Account ID

×



Field

hndwrt_Automated_Note_Template__c

←

Value

🔄

Handwrytten Note from Get_Note > Automated Tem...

×



+ Add Field

☐ Manually assign variables

Cancel

Done

Map fields for New Queue record.

Edit Create Records

Create Salesforce records using values from the flow.

Create Queue record (Create_Queue_record) 

How Many Records to Create

☒ One

☐ Multiple

How to Set the Record Fields

☐ Use all values from a record

☒ Use separate resources, and literal values

Create a Record of This Object

* Object

Handwrytten Queue

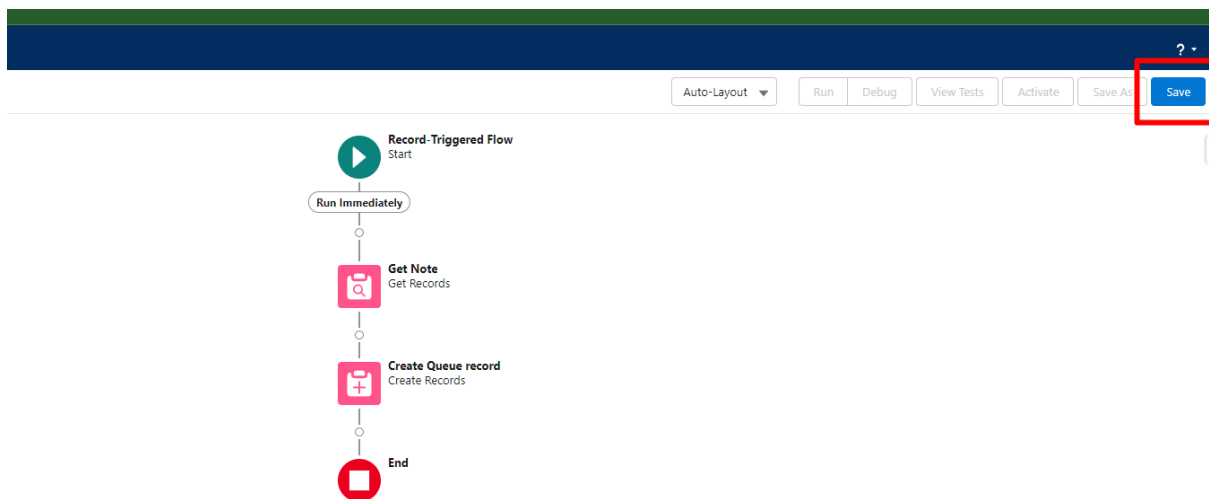
Set Field Values for the Handwrytten Queue

Field	Value
hndwrt_Account__c	← Aa \$Record > Account ID X 
hndwrt_Automated_Note_Template__c	←  Handwrytten Note from Get_Note > Automated Tem... X 

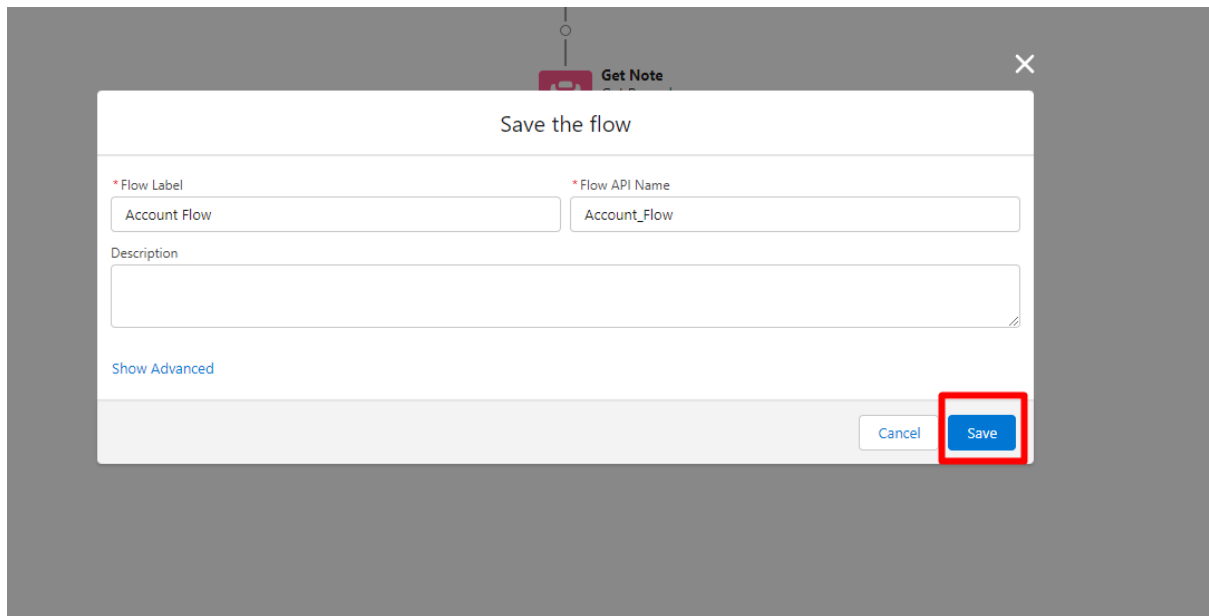
[+ Add Field](#)

☐ Manually assign variables

Map the appropriate field reference value to the appropriate field (Account, Contact, Lead or Opportunity). In this example Triggered object is Account and we map Account Id to Account field . Automated Note Name to Automated Note Template on Queue.Click Done.



Click Save.



Save the flow

* Flow Label: Account Flow

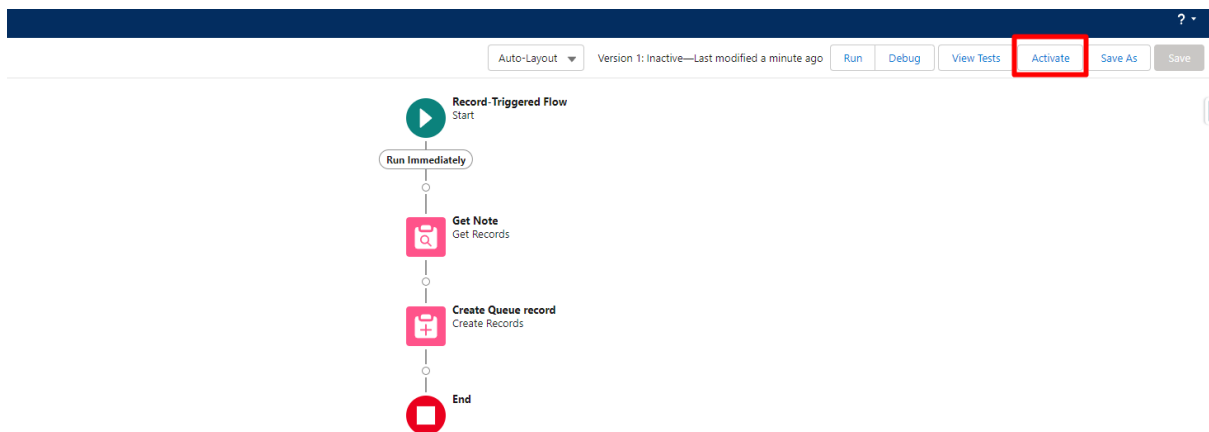
* Flow API Name: Account_Flow

Description:

Show Advanced

Cancel Save

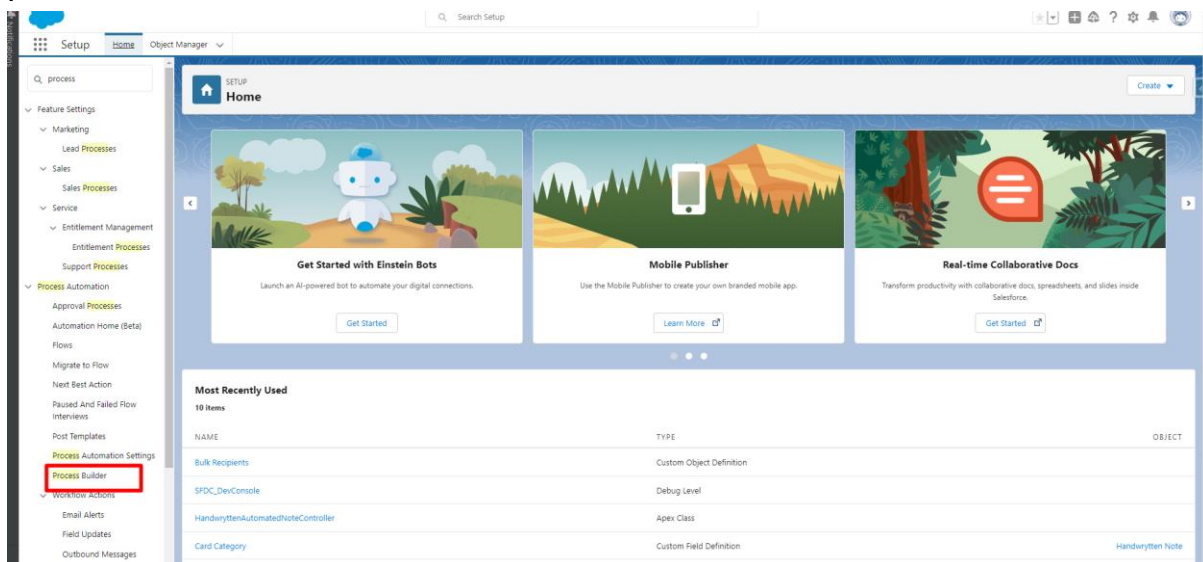
Insert flow name and click Save.



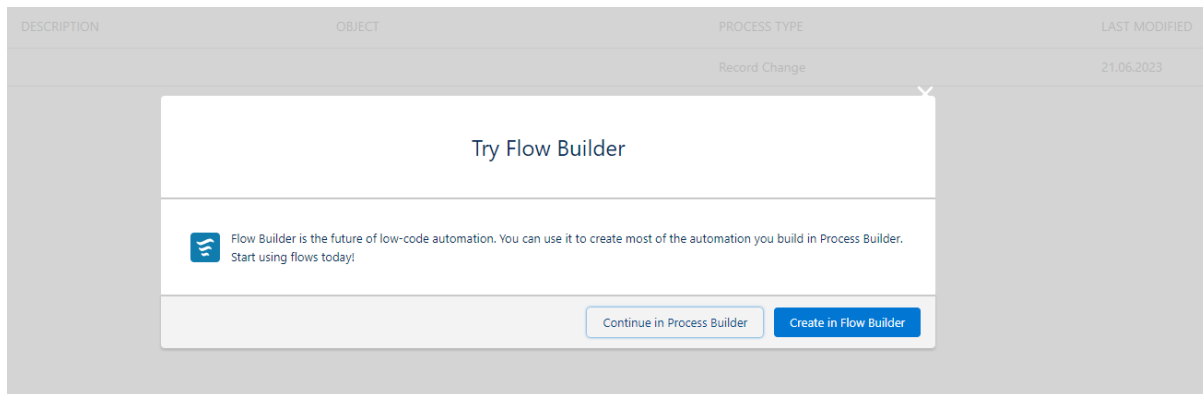
Click Activate. The flow is activated.

2. Process Builder

From Setup, in the Quick Find box, enter Process , and then select Process Builder



Click New and Continue in Process Builder.



Create a New Process. When defining an action choose to “Create a Record”.

[View All Processes](#)[Clone](#)[Edit Properties](#)[Activate](#)

Select and Define Action?

Action Type*

Create a Record

Action Name* i

Create Queue

Record Type*

Handwrytten Queue

Set Field Values

Field*	Type*	Value*	
Automated Note Template	String	Note	×
Account	Field Reference	[Contact].Id	Q ×
+ Add Row			