

NAAN MUDHALVAN

Salesforce Developer (Course)

Assignment no 1

Name: VIGNESHRAJA R

Year & Dep: IV year & CSBS

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Zone no: Zone 8

1. Creating a Master-Detail Relationship between two custom objects and setting up a Roll-Up Summary Field to calculate the total number of records in the child object is a common task in Salesforce. Below are the steps to achieve this:

Step 1: Create Custom Objects.

The screenshot shows the 'Custom Object Definition Edit' page for creating a new object named 'Parent'. The 'Label' field is set to 'Parent' and the 'Plural Label' field is set to 'Parents'. The 'Object Name' field is also set to 'Parent'. The 'Data Type' is selected as 'Text'. The 'Record Name' field is set to 'Parent Name'. The 'Description' field is empty. The 'Context-Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'. The 'Content Name' dropdown is set to 'None'. The sidebar on the left lists various setup categories like Fields & Relationships, Page Layouts, Lightning Record Pages, etc.

The screenshot shows the 'Custom Object Definition Edit' page for creating a new object named 'Child object'. The 'Label' field is set to 'Child object' and the 'Plural Label' field is set to 'Child objects'. The 'Object Name' field is set to 'Child_object'. The 'Description' field is empty. The 'Context-Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'. The 'Content Name' dropdown is set to 'None'. A yellow banner at the top indicates that permissions are disabled by default and provides links to enable them or skip the message.

Step 2: Create a Master-Detail Relationship

1. Go to "Setup" in Salesforce.
2. In the Quick Find box, type "Objects" and select "Objects and Fields" > "Objects".
3. Click on "Parent" to edit it.
4. In the "Custom Fields & Relationships" section, click "New" under "Related To".
5. Choose "Master-Detail Relationship" as the data type.
6. In the "Related To" field, select "Child".
7. Configure other options as needed (e.g., setting the relationship name and whether it's required).
8. Save the changes.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under 'Parent object', the 'Fields & Relationships' tab is active, displaying four fields: 'Created By', 'Last Modified By', 'Owner', and 'Parent object Name'. The 'Owner' and 'Parent object Name' fields are marked as indexed.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent object Name	Name	Text(80)		✓

The screenshot shows the Salesforce Object Manager interface for creating a new relationship. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Parent object' under 'SETUP > OBJECT MANAGER'. A sidebar on the right lists relationship types: 'None Selected', 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship', 'Master-Detail Relationship' (which is selected), 'External Lookup Relationship', 'Checkbox', and 'Currency'. The 'Master-Detail Relationship' section includes a detailed description and bullet points about its behavior.

The screenshot shows the 'New Relationship' wizard for a 'Parent' object. Step 2, 'Choose the related object', is displayed. The sidebar on the left shows setup options. The main area has a title 'Parent New Relationship' and a sub-header 'Step 2. Choose the related object'. It asks 'Select the other object to which this object is related.' and shows a dropdown menu with 'Child' selected. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

SETUP > OBJECT MANAGER
Child

Fields & Relationships
5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Child Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
total child count	total_child_count_c	Roll-Up Summary (COUNT Parent)		✓

SETUP > OBJECT MANAGER
Child

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

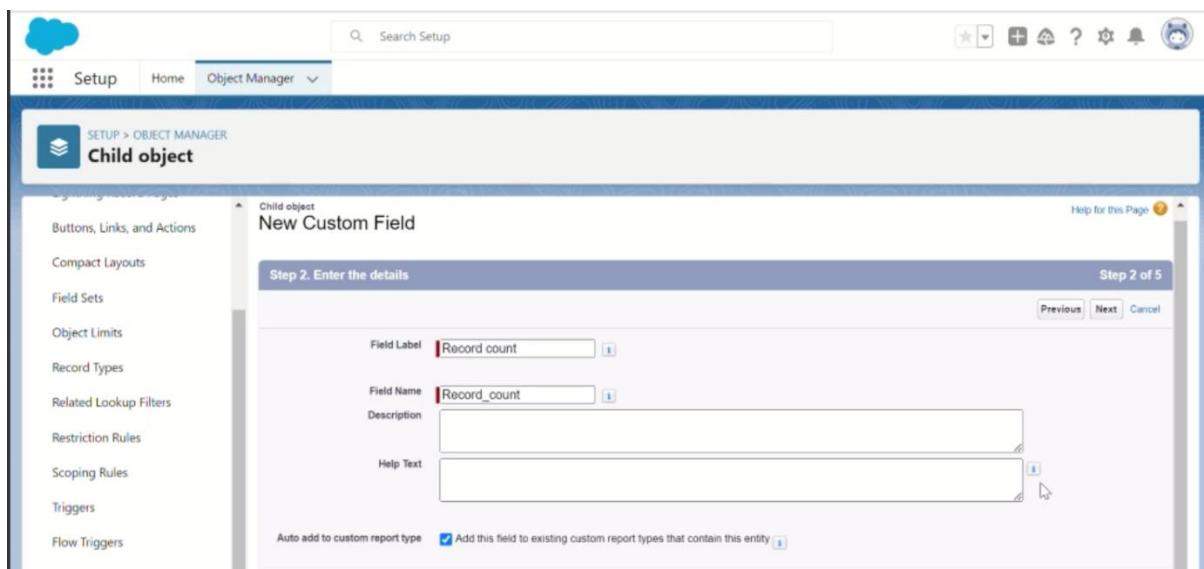
- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Roll-Up Summary A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- Checkbox Allows users to select a True (checked) or False (unchecked) value.
- Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Step 1

Next Cancel

Step 3: Create a Roll-Up Summary Field

1. In the same "Parent" editing page, scroll down to the "Roll-Up Summary Fields" section.
2. Click "New Roll-Up Summary Field."
3. Choose the "Child" as the child object for which you want to calculate the total.
4. Give your Roll-Up Summary Field a name (e.g., "Total_Child_Records__c").
5. Choose the type of calculation you want (e.g., "COUNT").
6. Configure any additional filter criteria if needed.
7. Save the changes.



Step 4: Update Page Layouts and Record Types (if necessary)

Depending on your use case, you may want to update page layouts and record types to make sure the new relationship and fields are displayed correctly to your users.

App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...	
1 All Tabs	AllTabSet		22/08/2023, 11:15 am	Classic		
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/08/2023, 11:15 am	Classic	✓	
3 App Launcher	AppLauncher	App Launcher tabs	22/08/2023, 11:15 am	Classic	✓	
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for you...	22/08/2023, 11:17 am	Lightning	✓	
5 Community	Community	Salesforce CRM Communities	22/08/2023, 11:15 am	Classic	✓	
6 Content	Content	Salesforce CRM Content	22/08/2023, 11:15 am	Classic	✓	
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and man...	22/08/2023, 11:15 am	Lightning	✓	
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/08/2023, 11:15 am	Lightning	✓	
9 Dreamhouse	Dreamhouse		29/08/2023, 4:12 pm	Lightning	✓	
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/08/2023, 11:15 am	Lightning	✓	
11 Marketing	Marketing	Best-in-class on-demand marketing automation	22/08/2023, 11:15 am	Classic	✓	
12 Platform	Platform	The fundamental Lightning Platform	22/08/2023, 11:15 am	Classic		
13 Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2023, 11:15 am	Lightning	✓	
14 Sales	Sales	The world's most popular sales force automation (SFA) sol...	22/08/2023, 11:15 am	Classic		
15 Sales	LightningSales	Manage your sales process with accounts, leads, opportuni...	22/08/2023, 11:15 am	Lightning	✓	

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 Branding
*App Name <small>(Required)</small> <input type="text" value="Parent Details"/>	Image <small>(Required)</small> <input type="file"/> <input type="button" value="Upload"/>
*Developer Name <small>(Required)</small> <input type="text" value="User A"/>	Primary Color Hex Value <small>(Required)</small> <input type="color" value="#007002"/> #007002
Description <small>(Optional)</small> <input type="text" value="Enter a description..."/>	Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme

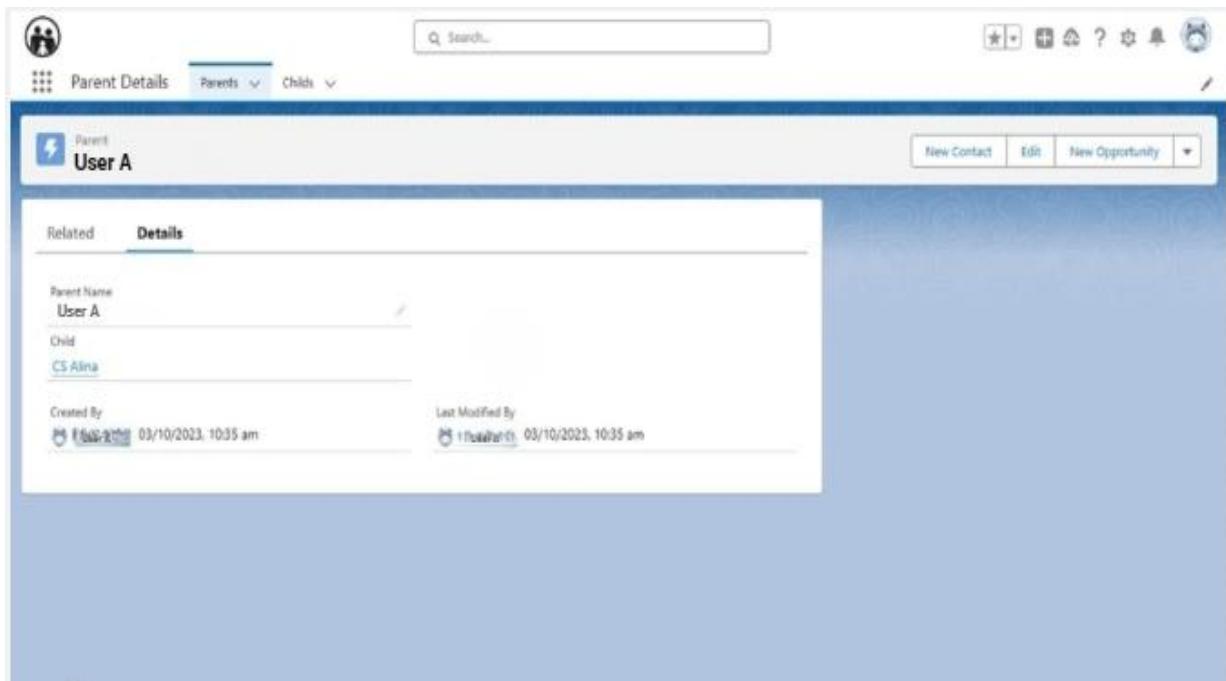
App Launcher Preview

Next

Step 5: Test the Relationship and Roll-Up Summary Field

Create some records in both the Parent and Child objects and verify that the Roll-Up Summary Field correctly calculates the total number of related Child records on the Parent record.

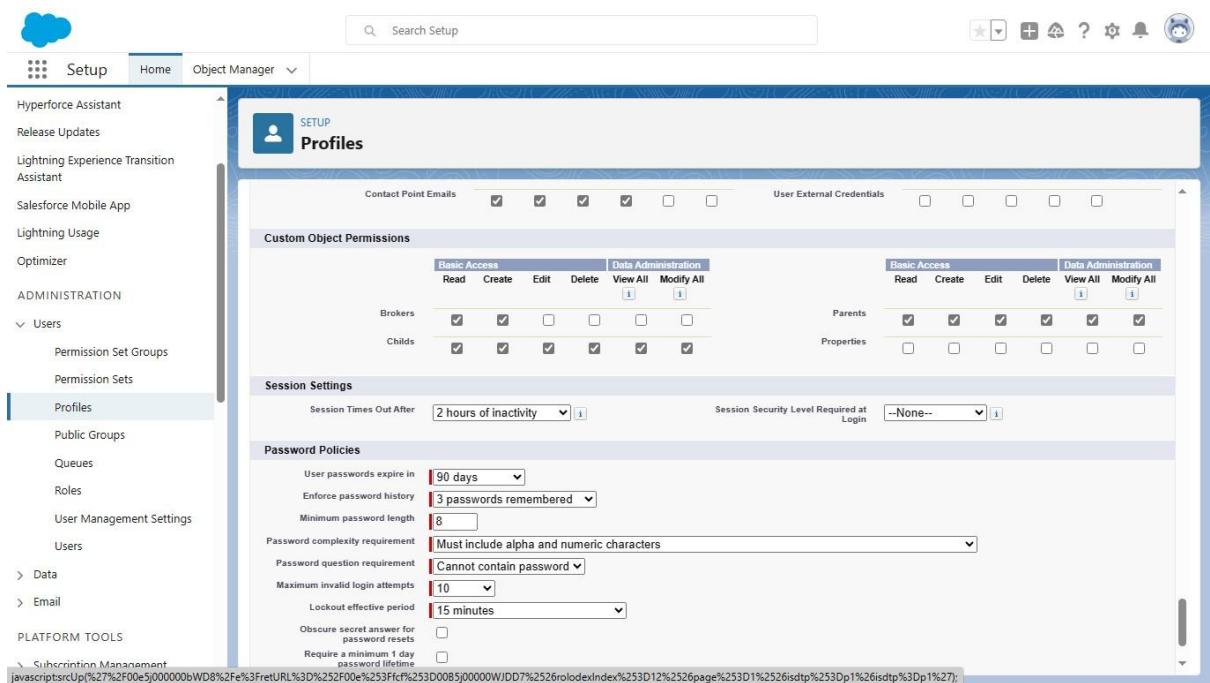
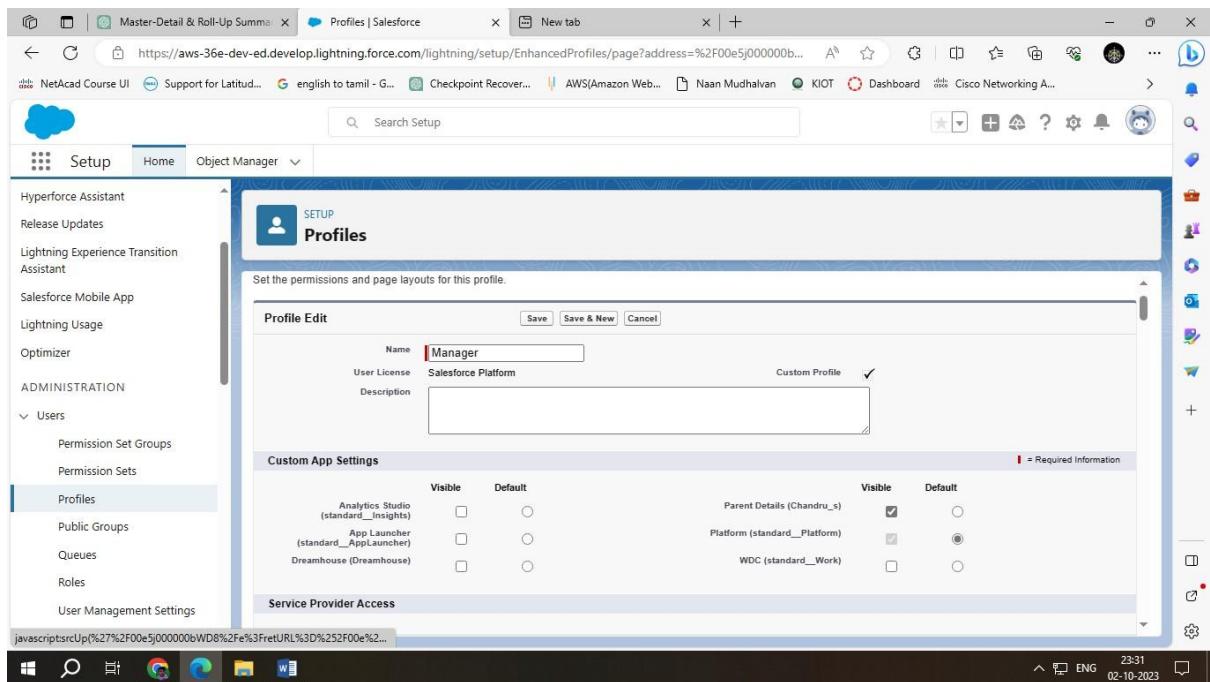
That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



2. If there are 2 users, User A and User B in the organization and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

Step 1: Create a Public Group

1. Go to "Setup" in Salesforce.
2. In the Quick Find box, type "Public Groups" and select it.
3. Click on "New Public Group."
4. Create a group for User A, let's call it "UserA_Group," and add User A to this group.
5. Create another group for User B, let's call it "UserB_Group," and add User B to this group.



Step 2: Create Criteria-Based Sharing Rules

For User A:1. Go to "Setup" in Salesforce.

2. In the Quick Find box, type "Sharing Rules" and select "Sharing Settings."

3. Under "Account Sharing Rules," click on "New Sharing Rule."

4. Create a rule that shares records owned by members of "UserB_Group" with the "UserA_Group."

5. Define the criteria based on which records should be shared (e.g., ownership).

6. Save the sharing rule.

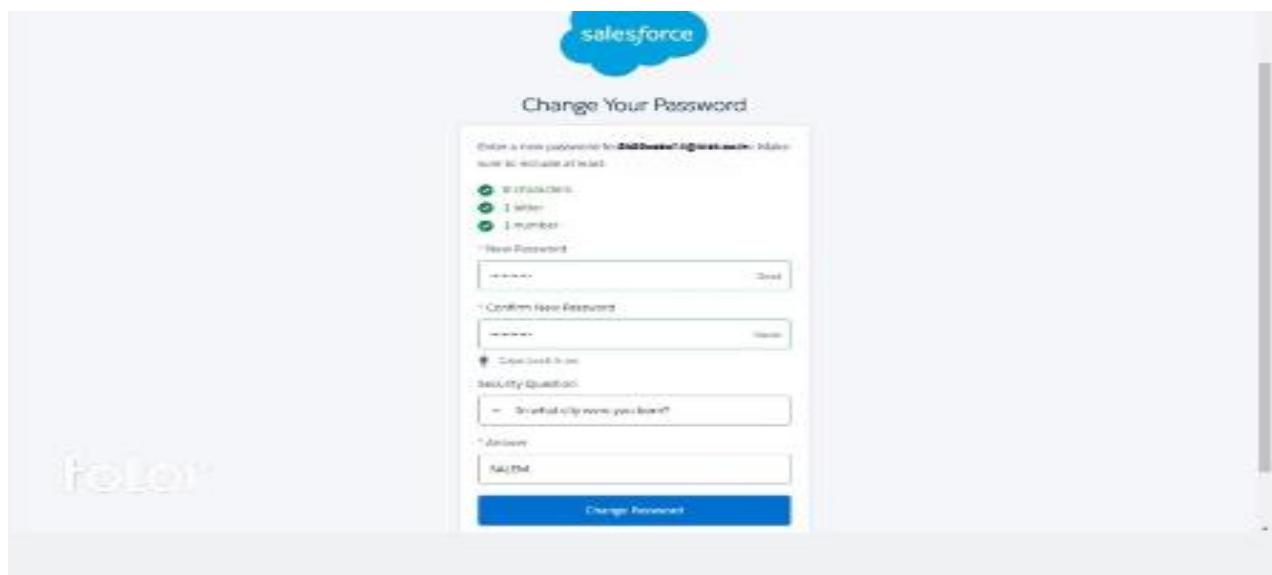
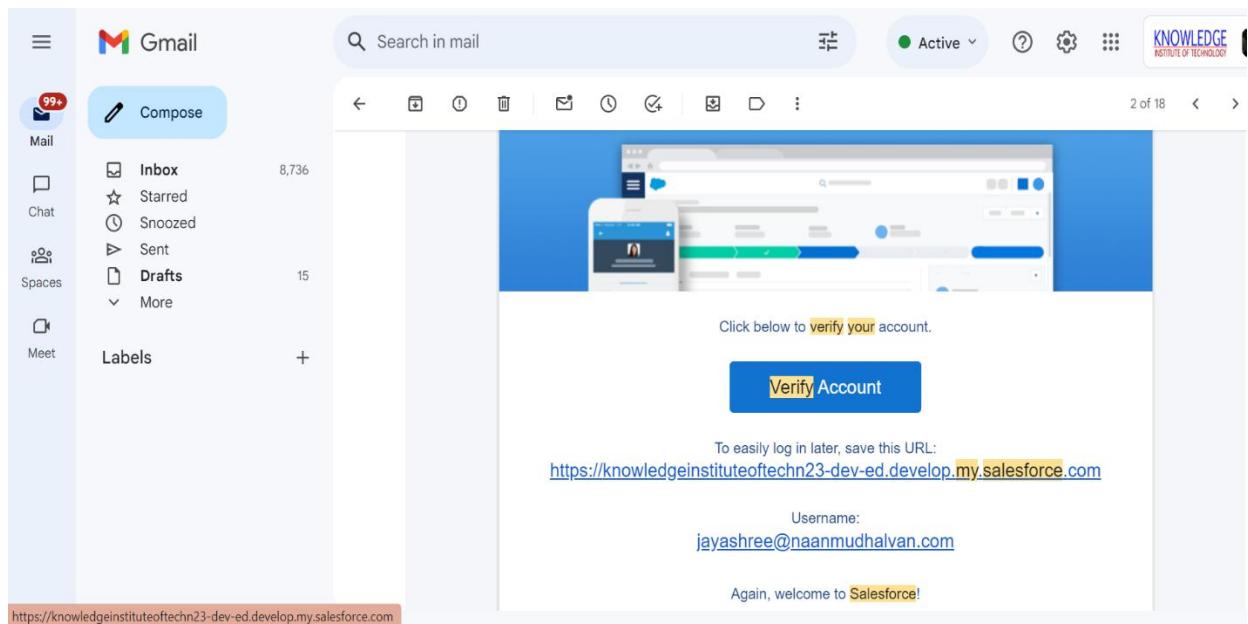
The image consists of two vertically stacked screenshots of the Salesforce Setup interface, specifically the 'Users' section.

Screenshot 1: New User Creation

This screenshot shows the 'User Edit' page for creating a new user. The 'General Information' tab is selected. The user is named 'User B' with alias 'ub', email 'ub@gmail.com', and username 'ub34@gmail.com'. The role is set to 'SVP, Sales & Marketing', user license to 'Salesforce Platform', and profile to 'Standard Platform User'. The 'Active' checkbox is checked. Other optional checkboxes like 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', and 'Site.com Contributor User' are shown but not selected.

Screenshot 2: User Detail View

This screenshot shows the 'User Detail' page for the user 'User B'. It displays the same information as the creation screen: Name (User B), Alias (ub), Email (ub@gmail.com), Username (ub34@gmail.com), Nickname (USR), Role (SVP, Sales & Marketing), User License (Salesforce Platform), Profile (Standard Platform User), and Active status (checked). It also shows other fields like Title, Company, Department, Division, Address, and Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)).



Profile Edit

Bmanager

Set the permissions and page layouts for this profile.

Profile Edit

Name	Bmanager	User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description					

Custom App Settings

Visible	Default	Visible	Default
<input type="checkbox"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
<input type="checkbox"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
<input type="checkbox"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home Default On Learning Default On

Custom Object Permissions

Contacts	Push Topics
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Contact Point Addresses	Sellers
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Contact Point Consents	Streaming Channels
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Contact Point Emails	User External Credentials
<input checked="" type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

Password Policies

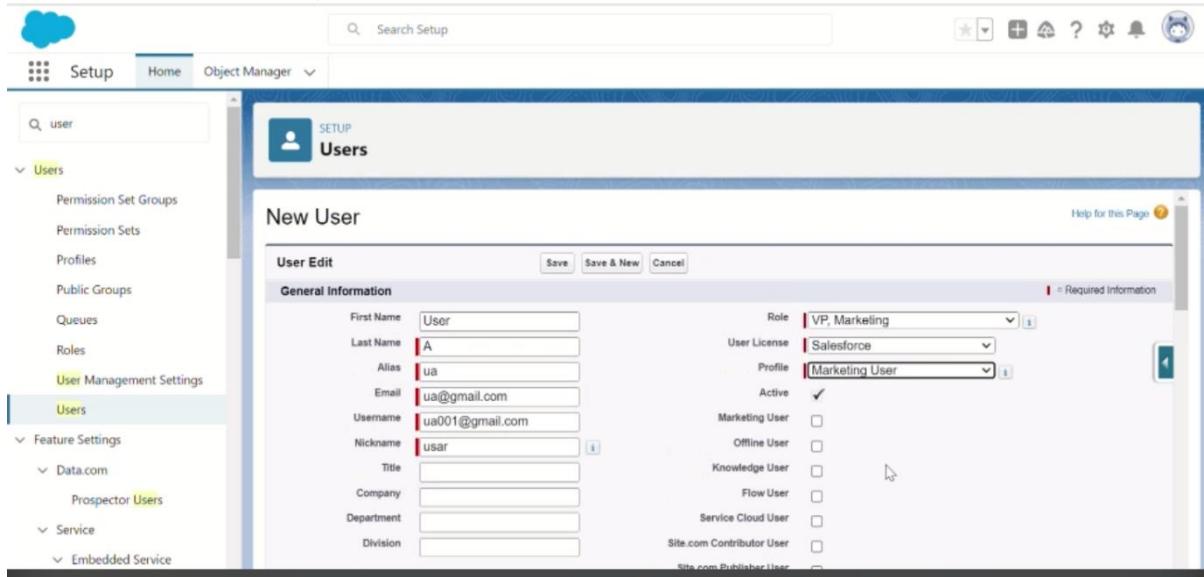
- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10

For User B:

1. Follow the same steps as above but create a separate sharing rule for User B.
2. This rule should share records owned by members of "UserA_Group" with the "UserB_Group."

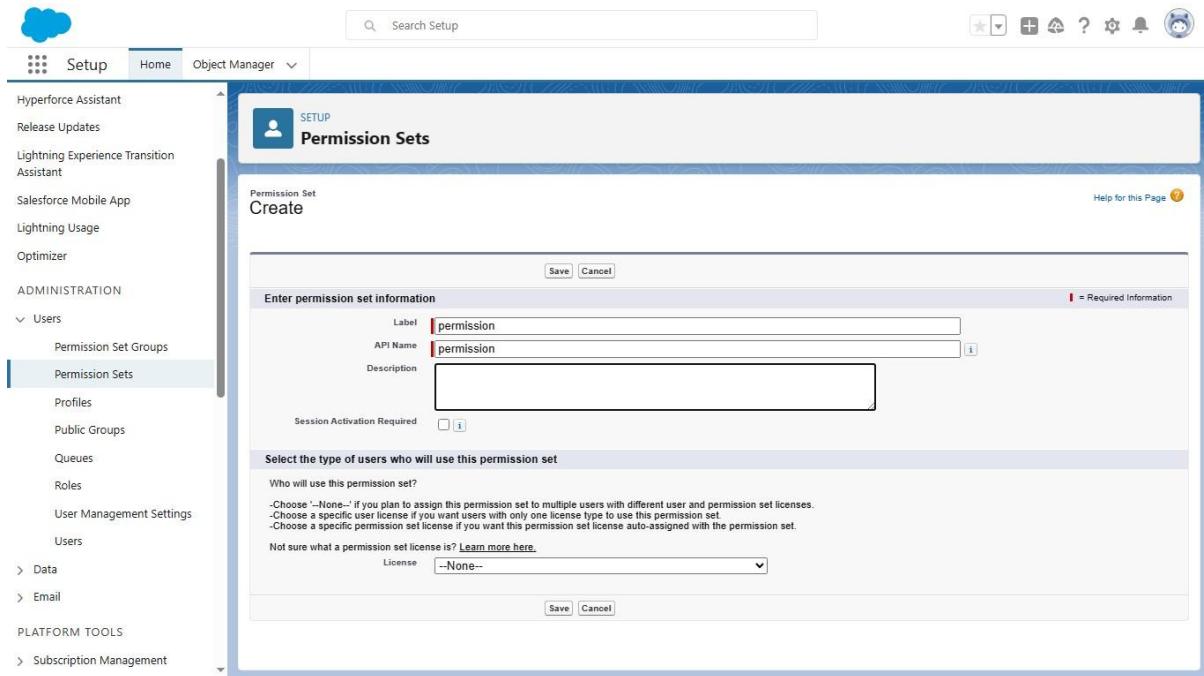
3. Define the criteria based on which records should be shared.

4. Save the sharing rule.



The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing various setup categories like User Management Settings, Feature Settings, and Data.com. Under User Management Settings, the 'Users' section is selected. In the main content area, a 'New User' form is displayed under the 'User Edit' tab. The 'General Information' section contains fields for First Name (User), Last Name (A), Alias (ua), Email (ua@gmail.com), Username (ua001@gmail.com), Nickname (user), Title (), Company (), Department (), and Division (). To the right of these fields are dropdown menus for Role (VP, Marketing), User License (Salesforce), and Profile (Marketing User). A legend indicates that red boxes highlight required information. Below the main form, there are several checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, and Site.com Publisher User. At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons.

Step 3: Assign Records Ownership



The screenshot shows the Salesforce Setup interface. The navigation sidebar is open, showing categories like Hyperforce Assistant, Release Updates, and Administration. Under Administration, the 'Permission Sets' section is selected. In the main content area, a 'Permission Set Create' form is displayed. The 'Enter permission set information' section includes fields for Label (permission) and API Name (permission). There is also a large text area for Description and a checkbox for Session Activation Required. Below this, a section titled 'Select the type of users who will use this permission set' provides instructions: 'Choose -None- if you plan to assign this permission set to multiple users with different user and permission set licenses.' It also notes that choosing a specific user license or permission set license will auto-assign the permission set license. A note at the bottom states 'Not sure what a permission set license is? Learn more here.' A dropdown menu for 'License' is set to '-None-'. At the bottom of the form are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the following details:

Left Navigation Bar:

- Setup
- Home
- Object Manager

Permission Set Overview:

Permission Set: permission

Object Settings:

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invitees	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

Childs:

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Object Permissions:

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

Field Permissions:

Field Name	Read Access	Edit Access
Child Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the following details:

Left Navigation Bar:

- Setup
- Home
- Object Manager

Permission Set Overview:

Permission Set: permission

Childs:

Save | Cancel

Tab Settings:

Available	Visible
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Object Permissions:

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

Field Permissions:

Field Name	Read Access	Edit Access
Child Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Home, Object Manager, and various administrative tools like Performance Assistant, Salesforce Update, and Lightning Experience. Under "Users", the "Permission Sets" section is selected. The main content area is titled "Permission Sets" and contains a table of existing permission sets. The table columns are Action, Permission Set Label, Description, and License. The table lists several permission sets, including "Buyer", "Buyer Manager", "C360 High Scale Flow Integration User", "CRM User", "Commerce Admin", and "Contact Center Admin". A "New" button is available to create a new permission set.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to ...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to ...	Cloud Integration User
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cl...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that us...	Service Cloud Voice User

The screenshot shows the "Select an Expiration Option For Assigned Users" page. The left sidebar is identical to the previous screenshot. The main content area has a title "Select an Expiration Option For Assigned Users" and includes options for "No-expiration date" (selected) and "Specify the expiration date". It also includes a "Time Zone" dropdown. Below these options is a table titled "Selected Users" showing one user assigned to the "Buyer" permission set. The user is "Jagadeesh A." with a "Manager" profile and "Active" status. The "User License" is "Salesforce Platform" and the "Expires On" is "Never Expires". At the bottom are "Cancel", "Back", and "Assign" buttons.

Setup Home Object Manager

Hyperfector Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings Users DATA Email PLATFORM TOOLS Subscription Management

Search Setup

PERMISSION permission

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Deborah A.	Salesforce Platform			Success

Done

This screenshot shows the 'Assignment Summary' page in the Salesforce setup. It displays a single row for 'Deborah A.' with a 'User License' of 'Salesforce Platform'. The status is 'Success'. The top right corner of the main content area has a green banner stating '1 assignments were successful.' with a checkmark icon.

Setup Home Object Manager

Hyperfector Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings Users DATA Email PLATFORM TOOLS Subscription Management

Search Setup

SETUP Permission Sets

Object	Access Level	Count
Operating Hours Holidays	No Access	/
Opportunities	No Access	26
Opportunity Contact Role	--	6
Opportunity Product	--	14
Order Products	--	15
Orders	No Access	33
Parents	No Access	4
Party Consents	No Access	18
Payment Authorization Adjustments	No Access	24
Payment Authorizations	No Access	30
Payment Gateway Logs	No Access	--
Payment Gateways	No Access	6
Payment Groups	No Access	1
Payment Line Invoices	No Access	20
Payments	No Access	41
Pending Order Summaries	No Access	--
Pending Order Summary Processed Events	No Access	--
Price Book Entries	--	9
Price Books	No Access	6
Privacy Consents	No Access	--
Problem Related Items	--	10
Problems	No Access	21
Process Cart Pricing Events	No Access	--
Process Cart Pricing Response Events	No Access	--
Process Exceptions	No Access	12
Product Attributes	--	3
Product Attribute Set Products	--	2

This screenshot shows the 'Permission Sets' page in the Salesforce setup. The left sidebar is identical to the first screenshot. The main content area lists various objects and their current access levels (e.g., 'No Access', '--'). The table includes columns for the object name, access level, and count of users affected.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets), Data (Data, Email), and Platform Tools (Subscription Management). The "Permission Sets" section is currently selected. The main content area is titled "Permission Sets" and shows a "permission" permission set. It includes tabs for "Permission Set Overview", "Object Settings", and "Parents". Under "Parents", there is a table with columns "Available" and "Visible". Under "Object Permissions", there is a table with columns "Permission Name" and "Enabled". Under "Field Permissions", there is a table with columns "Field Name", "Read Access", and "Edit Access". A status bar at the bottom indicates the URL: <https://aws-36e-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/0P55j000007Uxoi/e?EntityPermissions&o=011j000002r5H&sdtp=p1>.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous one. The main content area is titled "Assignment Summary" and shows a success message: "... > PERMISSION S ... permission" with "1 assignments were successful." Below this, there is a table titled "Assignment Summary" with columns: Full Name, User License, Expires On, Time Zone, and Status. One row is shown: Sanjay P, Salesforce Platform, and Success. A "Done" button is located at the bottom right.

3. Suppose there are 2 Users and they are having Create, Read, Edit

access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Step 1: Create a Permission Set for Delete Access

1. Go to "Setup" in Salesforce.
2. In the Quick Find box, type "Permission Sets" and select it.
3. Click "New Permission Set" to create a new one.
4. Give the permission set a name (e.g., "Delete Access Permission Set").
5. In the "System Permissions" section, find and enable the "Delete" permission for the "Account" object.
6. Save the permission set.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'user' and includes sections for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users' (which is selected), 'Feature Settings', 'Data.com', 'Prospector', and 'Service'. The main content area is titled 'SETUP Users' and shows a table of 'All Users'. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users with their respective details and assigned profiles. At the top of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A navigation bar at the bottom of the table includes letters from A to Z and an 'All' button.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A_JAYASHREE	JA	jayashree@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00d500000dbf4ea1.wfoznpbla6nf@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	shree_Jo	jshtre	suwetha@gmail.com	SVP_Sales & Marketing	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	shree_Uva	ushtre	ugeetha@gmail.com	SVP_Human Resources	<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d500000dbf4ea1.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d500000dbf4ea1.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

The screenshot shows the Salesforce Setup interface under the 'Profiles' section. The left sidebar includes links for Optimizer, Administration (Users, Permission Set Groups, Permission Sets), Platform Tools (Subscription Management, Apps, Feature Settings, Slack, MuleSoft, Einstein), and Lightning Usage. The main content area displays a table of profiles with columns for Action, Profile Name, User License, and Status (Custom). The table lists various profiles like Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter External User, Chatter Free User, Chatter Moderator User, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, Custom Sales Profile, Custom Support Profile, Customer Community Login, Customer Community Plus Login, and Customer Community Plus. A navigation bar at the bottom indicates 1-25 of 41 profiles, 0 selected, and page 1 of 2.

The screenshot shows the 'Clone Profile' page in the Salesforce Setup. The left sidebar is identical to the previous screenshot. The main content area has a heading 'Clone Profile' and a sub-heading 'Enter the name of the new profile.' Below this, a message says 'You must select an existing profile to clone from.' A form is displayed with fields for Existing Profile (set to 'Standard Platform User'), User License (set to 'Salesforce Platform'), and Profile Name (set to 'Manager'). A note at the top right indicates '1 Required Information'. At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar has 'Profiles' selected under 'User Management Settings'. The main content area displays the 'Profile Detail' for 'Edu'. It includes fields for Name (Edu), User License (Salesforce Platform), Description, Created By (JAYASHREE A, 18/10/2023, 9:06 am), and Modified By (JAYASHREE A, 18/10/2023, 9:06 am). Below this is a section for 'Page Layouts'.

Profile Detail

Name	Edu	User License	Salesforce Platform	Custom Profile	✓
Description					
Created By	JAYASHREE A, 18/10/2023, 9:06 am			Modified By	JAYASHREE A, 18/10/2023, 9:06 am

Page Layouts

Standard Object Layouts

The screenshot shows the Salesforce Setup interface with the 'Page Layouts' page open. The left sidebar has 'Page Layouts' selected under 'Standard Object Layouts'. The main content area displays a table of page layouts across various objects.

Object	Layout Type	Layout Name	Action
Global	Global Layout	[View Assignment]	Object Milestone Layout [View Assignment]
Email Application	Not Assigned	[View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout	Home Page Default	[View Assignment]	Order Layout [View Assignment]
Account	Account Layout	[View Assignment]	Order Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Payment Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout	[View Assignment]	Payment Authorization Layout [View Assignment]
Asset	Asset Layout	[View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
Asset Relationship	Asset Relationship Layout	[View Assignment]	Payment Gateway Layout [View Assignment]
Assigned Resource	Assigned Resource Layout	[View Assignment]	Payment Gateway Log Layout [View Assignment]

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and various Administration sections like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Help.

The main content area displays the 'Profiles' setup page. It features two tabs for 'Basic Access' and 'Data Administration'. Under 'Basic Access', there are sections for 'Brokers' and 'Childs'. Under 'Data Administration', there are sections for 'Parents' and 'Properties'. Below these tabs are 'Session Settings' and 'Password Policies' sections. The 'Session Settings' section includes fields for 'Session Times Out After' (set to '2 hours of inactivity') and 'Session Security Level Required at Login' ('None'). The 'Password Policies' section includes fields for 'User passwords expire in' (set to '90 days'), 'Enforce password history' (set to '3 passwords remembered'), 'Minimum password length' (set to '8'), 'Password complexity requirement' (set to 'Must include alpha and numeric characters'), 'Password question requirement' (set to 'Cannot contain password'), 'Maximum invalid login attempts' (set to '10'), 'Lockout effective period' (set to '15 minutes'), 'Obscure secret answer for password resets' (unchecked), 'Require a minimum 1 day password lifetime' (unchecked), and 'Don't immediately expire links in forgot password emails' (unchecked). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Profile Edit' page for the 'Edu' profile selected. The left sidebar includes links for Setup Home, Object Manager, and various Administration sections like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Help.

The main content area displays the 'Profile Edit' page for the 'Edu' profile. It includes fields for 'Name' (set to 'Edu'), 'User License' (set to 'Salesforce Platform'), and 'Custom Profile' (checked). There is also a 'Description' field and a note indicating 'Profile Edit: Edu ~ Salesforce - Developer Edition'. Below this is a 'Custom App Settings' section with tables for 'Visible' and 'Default' settings for various apps. The 'Analytics Studio (standard_Insights)' app has its 'Visible' checkbox checked and 'Default' radio button selected. The 'Platform (standard_Platform)' app has its 'Visible' checkbox checked and 'Default' radio button selected. The 'App Launcher' app has its 'Visible' checkbox checked and 'Default' radio button selected. The 'WDC (standard_Work)' app has its 'Visible' checkbox checked and 'Default' radio button selected. A note at the bottom right indicates 'Required Information'.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** A search bar with "user", a "Users" section (selected), and other options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospectors.
- Main Content:** The "Users" page under "SETUP".
- Section:** All Users.
- Description:** On this page you can create, view, and manage users.
- Text:** To get more licenses, use the Your Account app. [Let's Go](#)
- View Options:** View: All Users, Edit, Create New View.
- Buttons:** New User, Reset Password(s), Add Multiple Users.
- Table:** A list of users with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table includes rows for various users like A JAYASHREE, Chatter Expert, shree_Jo, shree_Uva, User_Integration, and User_Security.
- Page URL:** https://knowledgeinstituteoftech23-dev-ed.lightning.force.com/one/one.app#/setup/ManageUsers/home

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** A search bar with "user", a "Users" section (selected), and other options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospectors.
- Main Content:** The "Users" page under "SETUP".
- Section:** General Information.
- Required Information:** Indicated by a red asterisk (*) next to the "Role" field.
- Form Fields:** First Name (JAYASHREE), Last Name (A), Alias (JA), Email (2k20cbs14@kiot.ac.in), Username (jayashree@naanmudhalvar), Nickname (jayashree), Title (Knowledge Institute of Tech), Company (Knowledge Institute of Tech), Department (Division), Role (<None Specified>), User License (Salesforce), Profile (System Administrator), Active (checked), Marketing User (checked), Offline User (checked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (checked), Site.com Contributor User (unchecked), Site.com Publisher User (unchecked), WDC User (unchecked), and Data.com User Type (None).

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "user" and contains the following navigation items:

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users** (selected)
- Feature Settings
- Data.com
- Prospector Users
- Service

The main content area is titled "SETUP Users" and shows the "User Detail" page for a user named "JAYASHREE A". The "Edit" tab is selected. The user's details are listed in two columns:

		Role
Name	JAYASHREE A	User License
Alias	JA	Profile
Email	2k20csbs14@kiot.ac.in [Verified]	Active
Username	jayashree@naanmudhalvar.com	Marketing User
Nickname	jayashree	Offline User
Title		Knowledge User
Company	Knowledge Institute of Technology	Flow User
Department		Service Cloud User
Division		Site.com Contributor User
Address	IN	Site.com Publisher User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User
Locale	English (India)	Mobile Push Registrations
Language	English	Data.com User Type
Delegated Approver		

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous one, with "user" selected.

The main content area is titled "SETUP Users" and shows the "General Information" page for a user. The "Required Information" indicator is present. The user's information is listed in two columns:

		Role
First Name	JAYASHREE	<input type="button" value="None Specified"/>
Last Name	A	User License
Alias	JA	Profile
Email	2k20csbs14@kiot.ac.in	Active
Username	jayashree@naanmudhalvar	Marketing User
Nickname	jayashree	Offline User
Title		Knowledge User
Company	Knowledge Institute of Tech	Flow User
Department		Service Cloud User
Division		Site.com Contributor User
		Site.com Publisher User
		WDC User
		Data.com User Type

The screenshot shows the Salesforce Setup interface. On the left, the navigation pane is open with 'Users' selected, specifically 'Public Groups'. The main content area is titled 'Public Groups' and shows a 'New Group' form. The 'Group Information' section has 'Label' set to 'user A Group' and 'Group Name' set to 'user_A_Group'. Under 'Grant Access Using Hierarchies', the checkbox is checked. In the 'Available Members' list, several users are listed: Balaji S S, Integration User, Security User, User A, and User B. The 'Selected Members' list currently contains none. At the bottom right of the form, there is a note: '! = Required Information'.

Step 2: Assign the Permission Set to the User Needing Delete Access

1. In the "Permission Set Detail" page, click on "Manage Assignments."
2. Click "Add Assignments" and select the user who needs delete access.
3. Save the assignment.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar shows various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, and Administration. Under 'Users', 'Permission Set Groups' is expanded, and 'Permission Sets' is selected. The main content area is titled 'Permission Sets' and displays a table of existing permission sets. The columns include Action, Permission Set Label, Description, and License. Some examples shown are 'Buyer' (B2B Buyer Permission Set One Seat), 'Buyer_Manager' (B2B Buyer Manager Permission Set One Seat), and 'Facility_Manager' (Facility Manager). The table also includes links for New, Edit, Delete, and Create New View.

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar includes links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-links for User Management Settings). The main content area is titled 'Permission Sets' and shows a permission set named 'permission01'. A modal window titled 'Edit Properties' is open, displaying fields for Label ('permission01'), API Name ('permission01'), Description, and Session Activation Required. Below the modal, sections for 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', and 'External Data Source Access' are visible.

This screenshot shows the 'Accounts' tab of the 'Object Settings' for the 'permission01' permission set. Under 'Object Permissions', there is a table with columns 'Permission Name' and 'Enabled'. The permissions listed are Read, Create, Edit, Delete, View All, and Modify All. Under 'Field Permissions', there is a table with columns 'Field Name', 'Read Access', and 'Edit Access'. The field names listed are Account Name, Account Number, Account Owner, Account Site, Account Source, Active, and Annual Revenue. Most fields have both 'Read Access' and 'Edit Access' checked.

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

Field Name	Read Access	Edit Access
Account Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	<input type="checkbox"/>	<input type="checkbox"/>
Active	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	<input type="checkbox"/>	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. Under ADMINISTRATION, there is a section for Permission Set Groups, with 'Permission Sets' selected. The main content area displays the 'Permission Sets' page for 'permission01'. It shows tabs for Object Settings (selected), Accounts, and Fields. Under 'Object Permissions' for 'Accounts', the following permissions are listed:

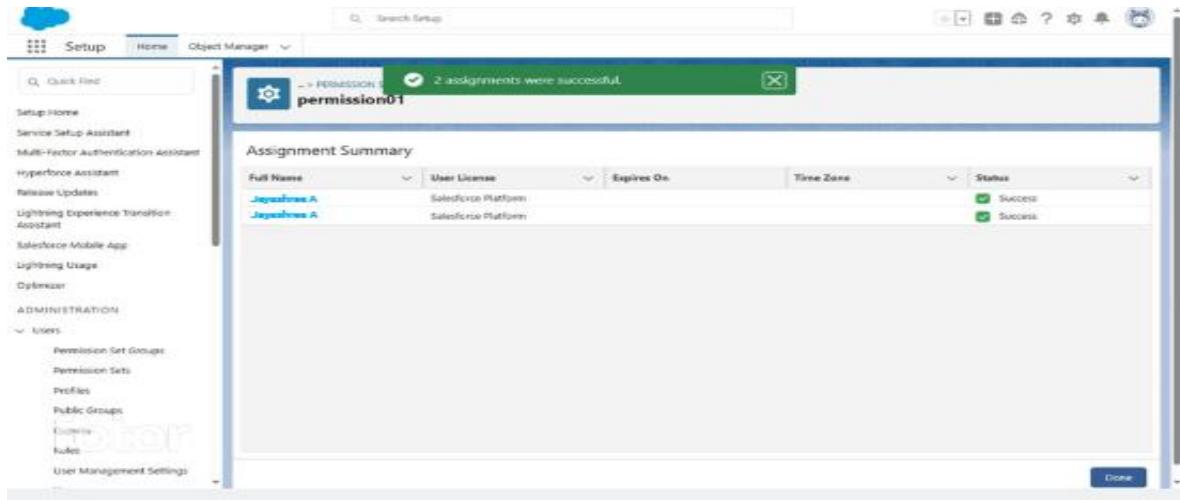
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Under 'Field Permissions' for 'Account', the following access levels are defined:

Field Name	Read Access	Edit Access
Account Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	<input type="checkbox"/>	<input type="checkbox"/>
Active	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	<input type="checkbox"/>	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. Under ADMINISTRATION, there is a section for Data and Email. The main content area displays the 'Public Groups' page. It shows a table of existing public groups:

Action	Label	Group Name	Created By	Created Date
Edit Del	user_A_Group	user_A_Group	S.S. Balaji	03/10/2023, 2:10 pm
Edit Del	user_B_Group	user_B_Group	S.S. Balaji	03/10/2023, 2:10 pm



4.Create a screen flow for a basic survey to fill in the details for any form.

Step 1: Create a custom object

1.Click Setup.

2.In the Object Manager, click Create | Custom Object.

3.Now create a custom object Survey Result and fields as shown in the screenshot below:

4. Click Save.



SETUP > OBJECT MANAGER
Survey Result

Details	Fields & Relationships				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Comment	Comment__c	Text Area(255)		▼
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Email	Email__c	Email		▼
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Name	Name__c	Text(51)		▼
Object Limits	Owner	OwnerId	Lookup(User,Group)	✓	
Record Types	Rating	Rating__c	Picklist		▼
Related Lookup Filters					
Search Layouts	Survey Result Name	Name	Auto Number	✓	▼
Search Layouts for Salesforce Classic					
Triggers					
Validation Rules					

Step 2: Create a Thank You For Survey Lightning Email Template

- 1.Click App Launcher.
- 2.In the Quick Find box, type Email Templates.
- 3.Clicks on the New Email template button.
- 4.Name the Lightning Email Template and make sure to store it in the Public Email Templates folder.
- 5.Create a template like the following screenshot

Email Template
Thank You Email - Survey

Edit in Builder Edit Clone ▾

Details Related

Information

Email Template Name: Thank You Email - Survey
Related Entity Type: Survey Result

Description:
Folder: Public Email Templates

Made in Email Template Builder

Message Content

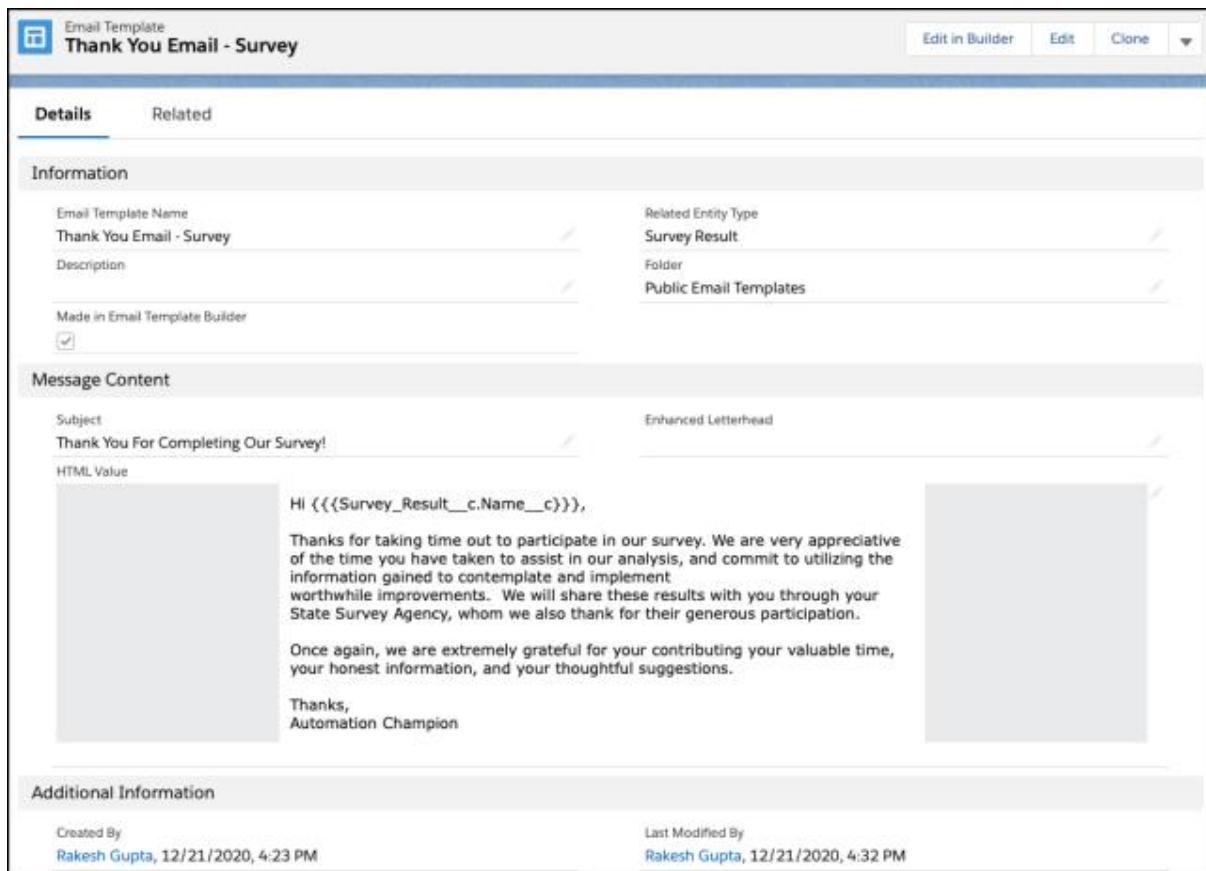
Subject: Thank You For Completing Our Survey!
Enhanced Letterhead

HTML Value:

```
Hi {{Survey_Result__c.Name__c}},  
  
Thanks for taking time out to participate in our survey. We are very appreciative  
of the time you have taken to assist in our analysis, and commit to utilizing the  
information gained to contemplate and implement  
worthwhile improvements. We will share these results with you through your  
State Survey Agency, whom we also thank for their generous participation.  
  
Once again, we are extremely grateful for your contributing your valuable time,  
your honest information, and your thoughtful suggestions.  
  
Thanks,  
Automation Champion
```

Additional Information

Created By: Rakesh Gupta, 12/21/2020, 4:23 PM Last Modified By: Rakesh Gupta, 12/21/2020, 4:32 PM



Step 3: Create an Email Alert

- 1.Click Setup.
- 2.In the Quick Find box, type Email Alerts.
- 3.Select Email Alerts, click on the New Email Alert button.
- 4.Name the Email Alert and click the Tab button. The Unique Name will populate.
- 5.For Object select Survey Result.
- 6.For the Email Template chooses Lightning Email Template Thank You Email – Survey.
- 7.For Recipient Type select Email Field: Email.

8.Click Save.

Survey - Thank You Email

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for:

Recipients

Available Recipients	Selected Recipients
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email

Add Remove

You can enter up to five (5) email addresses to be notified.

Additional Emails

From Email Address: Current User's email address

Make this address the default From email address for this object's email alerts.

Save Save & New Cancel

Step 4.1: Salesforce Flow – Create a Screen that Allow Users to Fill Survey

- 1.Click Setup.
- 2.In the Quick Find box, type Flows.
- 3.Select Flows then click on the New Flow.
- 4.Select the Screen Flow option and click on Next and configure the flow as follows:
- 5.How do you want to start building: Freeform
- 6.We will use the Screen element to capture a Survey response form. Drag and drop a Screen element onto the canvas.

Step 4.2: Salesforce Flow – Add a Record Creates Element to Save Survey Response

- 1.Drag-and-drop the Create Records element onto the Flow designer.
- 2.Enter a name in the Label (Save Response) field; the API Name will auto-populate.
- 3.For How Many Records to Create – select One.
- 4.For How to Set the Record Fields – select Use separate resources, and literal values.
- 5.Select the Survey_Result__c object from the dropdown list.
- 6.Set Field Values for the Survey Result

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row3:

Field: Name__c

Value: {!Name.firstName} {!Name.lastName}

Click Add Row

Row 3:

Field: Rating__c

Value: {!Rating}

7.Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

*Label	*API Name																				
Save Response	Save_Response																				
Description																					
<p>How Many Records to Create</p> <input checked="" type="radio"/> One <input type="radio"/> Multiple																					
<p>How to Set the Record Fields</p> <input type="radio"/> Use all values from a record <input checked="" type="radio"/> Use separate resources, and literal values																					
<p>Create a Record of This Object</p> <p>*Object</p> <input type="text" value="Survey Result"/>																					
<p>Set Field Values for the Survey Result</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Field</td> <td style="width: 50%;">Value</td> </tr> <tr> <td>Comment__c</td> <td>← A_a Comment X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Email__c</td> <td>← A_a Email > Value X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Name__c</td> <td>← {!Name.firstName} {!Name.lastName}</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Rating__c</td> <td>← A_a Rating X</td> </tr> <tr> <td colspan="2"> <input type="button" value="+ Add Field"/> </td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Manually assign variables </td> </tr> </table>		Field	Value	Comment__c	← A_a Comment X	Field	Value	Email__c	← A_a Email > Value X	Field	Value	Name__c	← {!Name.firstName} {!Name.lastName}	Field	Value	Rating__c	← A_a Rating X	<input type="button" value="+ Add Field"/>		<input type="checkbox"/> Manually assign variables	
Field	Value																				
Comment__c	← A_a Comment X																				
Field	Value																				
Email__c	← A_a Email > Value X																				
Field	Value																				
Name__c	← {!Name.firstName} {!Name.lastName}																				
Field	Value																				
Rating__c	← A_a Rating X																				
<input type="button" value="+ Add Field"/>																					
<input type="checkbox"/> Manually assign variables																					
<input type="button" value="Cancel"/> <input type="button" value="Done"/>																					

Step 4.3: Salesforce Flow – Call an Action – Email Alert to Send Out Thank You Email

- 1.Under Toolbox, select Element.
- 2.Drag-and-drop Action element onto the Flow designer.
- 3.In the Action box, type Survey – Thank You Email.
- 4.Clicks on the Survey – Thank You Email email alert.
- 5.Click Done.

Edit "Survey - Thank You Email" email alert

Use values from earlier in the flow to set the inputs for the "Survey - Thank You Email" email alert. To use its outputs later in the flow, store them in variables.

* Label

Send Thank You Email

* API Name

Send_Thank_You_Email

Description

Set Input Values

A3 * Record ID

{!Save_Response}

Cancel

Done

Save as

A New Version A New Flow

* Flow Label Survey * Flow API Name Survey

Description

Hide Advanced

How to Run the Flow User or System Context—Depends on How Flow is Launched

* Type Screen Flow

* API Version for Running the Flow 51

Interview Label Insert a resource... Survey {!\$Flow.CurrentDateTime}

Last Modified 12/21/2020, 4:54 PM by Rakesh Gupta

Status: Active Type: Screen Flow Version Number: 2

Cancel Save

The screenshot shows the 'Save as' dialog for a new flow. The 'Flow Label' is 'Survey' and the 'Flow API Name' is also 'Survey'. The 'Type' is set to 'Screen Flow'. The 'API Version for Running the Flow' is '51'. In the 'Interview Label' section, there's a placeholder 'Survey {!\$Flow.CurrentDateTime}'. The status is 'Active', the type is 'Screen Flow', and the version number is '2'. At the bottom, there are 'Cancel' and 'Save' buttons.

Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a Visualforce Page

Now we will create a Lightning Application that declares a dependency on the lightning:flow component.

- 1.Click Setup | Developer Console
- 2.Navigate to File | New | Lightning Application
- 3.Enter a Name (VFPageToLC) field, make sure to select the Lightning Out Dependency App checkbox.
- 4.Click Submit.
- 5.Copy code from GitHub and paste it into your Lightning Application.
- 6.Save your code.

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

VFPageToLC.app *

```
1 <aura:application access="global"
2           extends="ltng:outApp"
3           implements="ltng:allowGuestAccess">
4     <aura:dependency resource="lightning:flow"/>
5   </aura:application>
```

Logs, Tests, and Problems

Visualforce Page
Survey

Page Edit

Save Quick Save Cancel Where is this used? Component Reference Preview

Page Information

Label: Survey
Name: Survey
Description:

Available for Lightning Experience, Experience Builder sites, and the mobile app

Require CSRF protection on GET requests

Visualforce Markup Version Settings

```

<apex:page showheader="false" lightningStylesheets="true">
<html>
    <head>
        <apex:includeLightning />
        <!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualforce page-->
    </head>
    <body class="slds-scope">
        <div id="flowContainer" />
        <script>
            var statusChange = function (event) {
                if(event.getParam("status") === "FINISHED") {
                    var outputVariables = event.getParam("outputVariables");
                    var key;
                    for(key in outputVariables) {
                        if(outputVariables[key].name === "myOutput") {
                            ...
                        }
                    }
                }
            };
            $Lightning.use("c:VFPPageToLC", function() {
                $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
                    "flowContainer",
                    function (component) {
                        component.startFlow("Survey", );
                    }
                );
            });
        </script>
    </body>

```

Step 7: Create a Force.com Site to Open Your Flow for Unauthenticated Access

Now we will create a site to open the flow for unauthenticated access.

- 1.Click Setup.
- 2.In the Quick Find box, type Sites.
- 3.Clicks on the New button.
- 4.Fill the details as per the screenshot below:
- 5.Click Save.

Site Edit

Save **Cancel**

Site Label	Survey i	
Site Name	Survey i	
Site Description	 	
Site Contact	Rakesh Gupta i	
Default Record Owner	Rakesh Gupta i	
Default Web Address	http://katihar-developer-edition.gus.force.com/ survey i	
Active	<input checked="" type="checkbox"/> i	
Active Site Home Page	Survey i [Preview]	
Inactive Site Home Page	InMaintenance i [Preview]	
Site Template	SiteTemplate i	
Site Robots.txt	i	
Site Favorite Icon	i	
Analytics Tracking Code	i	
URL Rewriter Class	i	
Enable Feeds	<input type="checkbox"/>	
Clickjack Protection Level	Allow framing by the same origin only (Recommended) c i	
Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/> i	
Lightning Features for Guest Users	<input checked="" type="checkbox"/> i	
Upgrade all requests to HTTPS	<input checked="" type="checkbox"/> i	
Enable Content Sniffing Protection	<input checked="" type="checkbox"/> i	
Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/> i	
Referrer URL Protection	<input checked="" type="checkbox"/> i	
Guest Access to the Payments API	<input type="checkbox"/> i	

Under site, Public Access Settings make sure that guest users have Create access on Survey Result object and Edit on the fields.

Proof of Concept

Now onward, if someone opens the site url and fills the form:

Survey

Name

First Name

Alok

Last Name

Sinfal

*Email

[REDACTED]

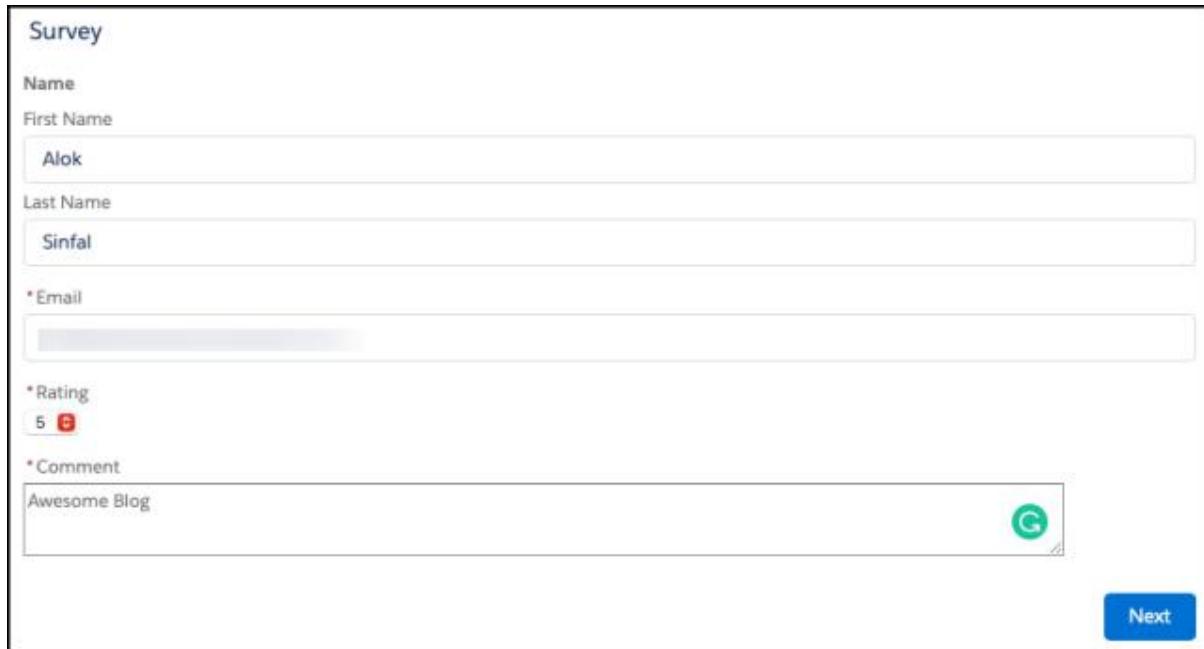
*Rating

5 

*Comment

Awesome Blog 

[Next](#)



After successful submission, he/she will receive an email.

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row 3:

Field: Name__c

Value: {!Name.firstName} {!Name.lastName}

Click Add Row

Row 3:

Field: Rating__c

Value: {!Rating}

Click Done.