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**Salesforce Developer (Course)**

**Assignment no 1**

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Year & Dep: IV year & CSBS

Batch: 2024

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'. A 'Description' field is present but empty. Context-sensitive help settings are shown at the bottom.

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'. A 'Description' field is present but empty. Context-sensitive help settings are shown at the bottom.

## 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 the "Parent object" tab, the "Fields & Relationships" section is displayed, showing four fields: Created By, Last Modified By, Owner, and Parent object Name. The "Owner" field is marked as indexed. The "Parent object Name" field is currently selected.

| 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**

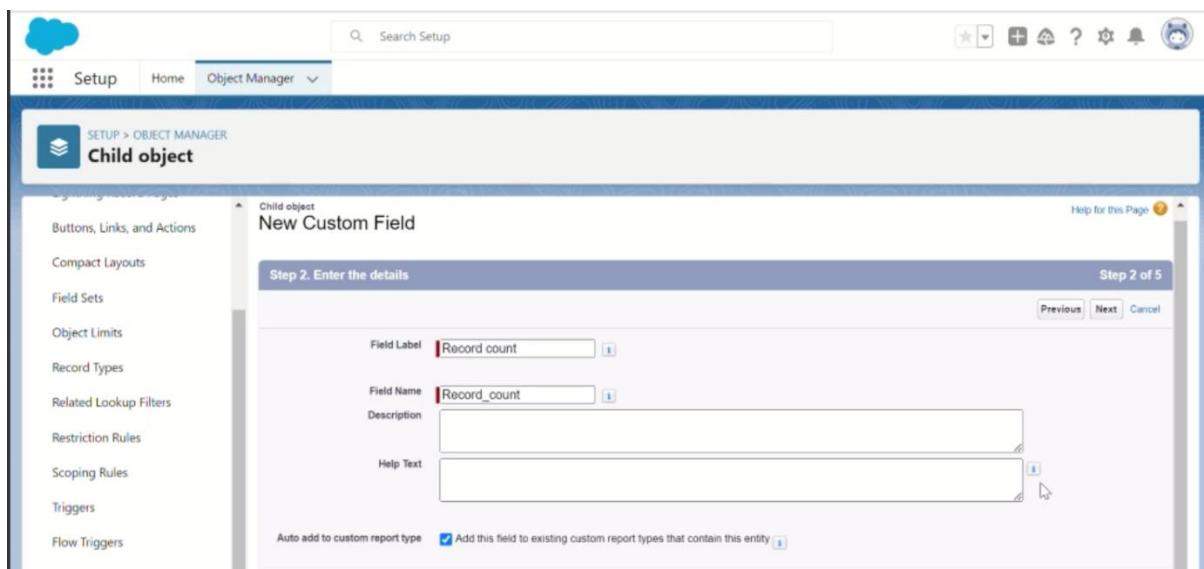
- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Roll-Up Summary A read-only field that derives its value from a formula expression you define. The 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><br>Parent Details           | Image <small>(Required)</small><br><input type="button" value="Upload"/>                                      |
| *Developer Name <small>(Required)</small><br>User A             | Primary Color Hex<br>Value <small>(Required)</small><br><input type="color" value="#007002"/> #007002         |
| Description <small>(Optional)</small><br>Enter a description... | Org Theme Options<br><input type="checkbox"/> Use the app's image and color instead of the org's custom theme |

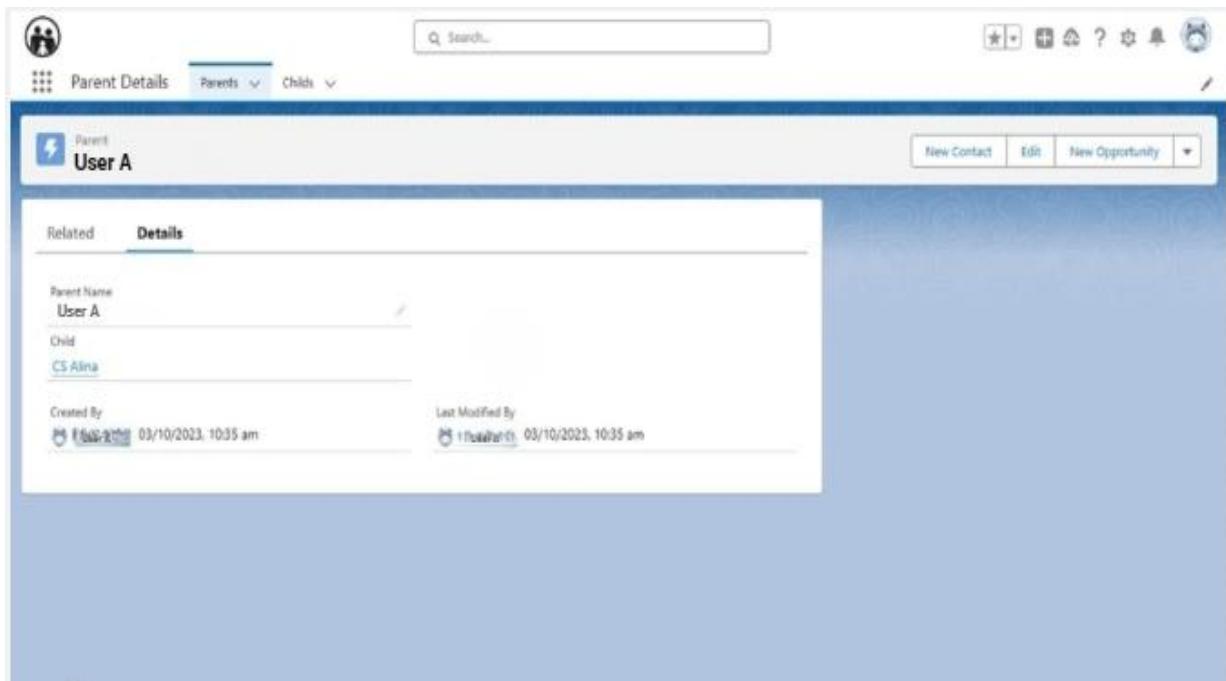
App Launcher Preview

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.

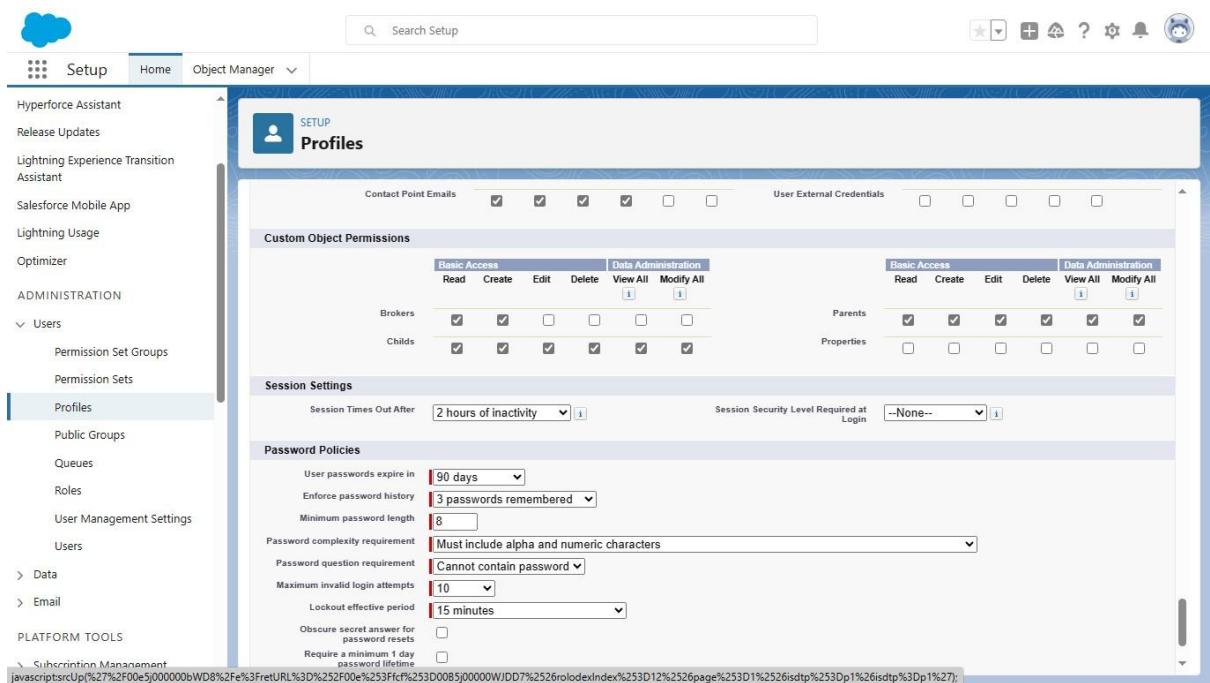
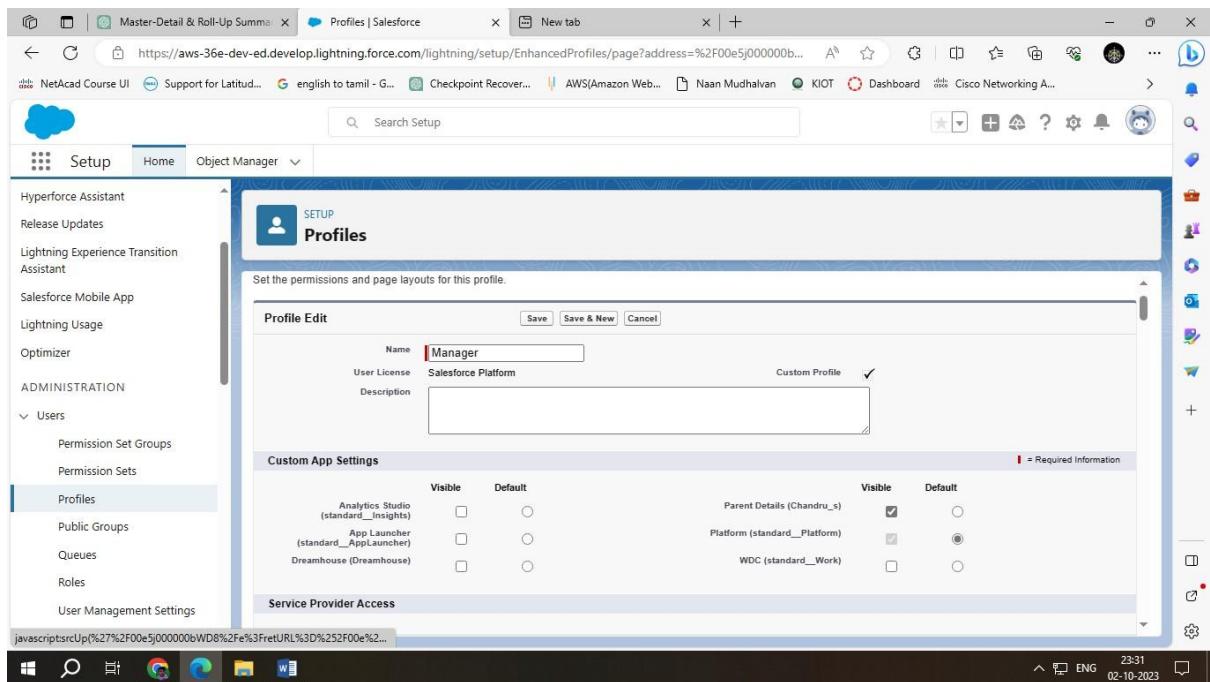
That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



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.**

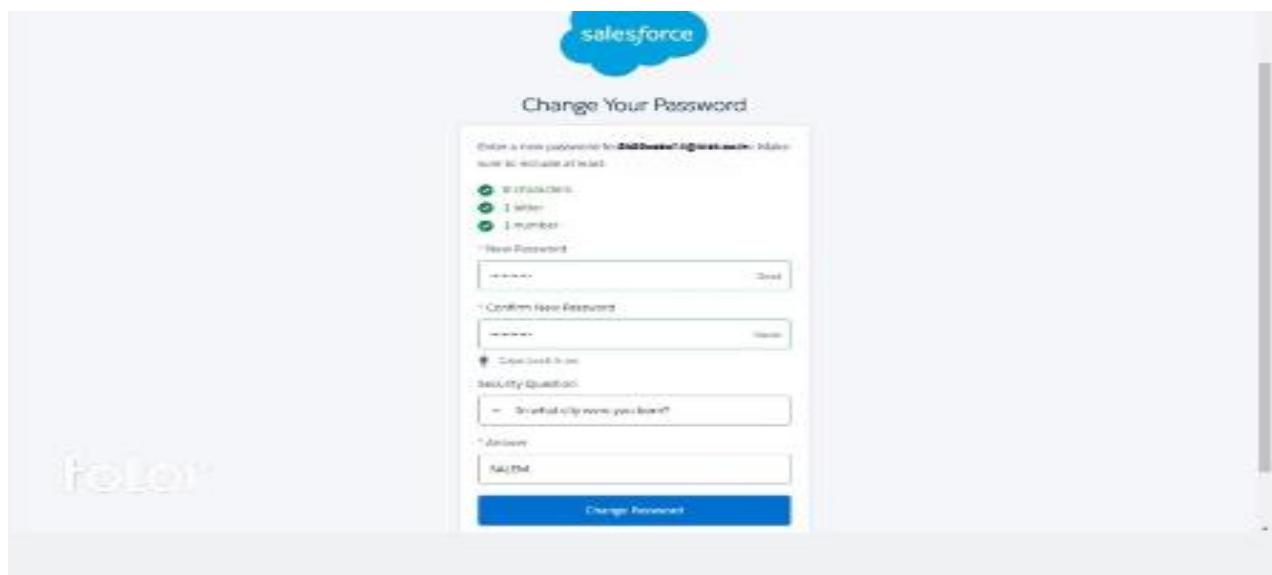
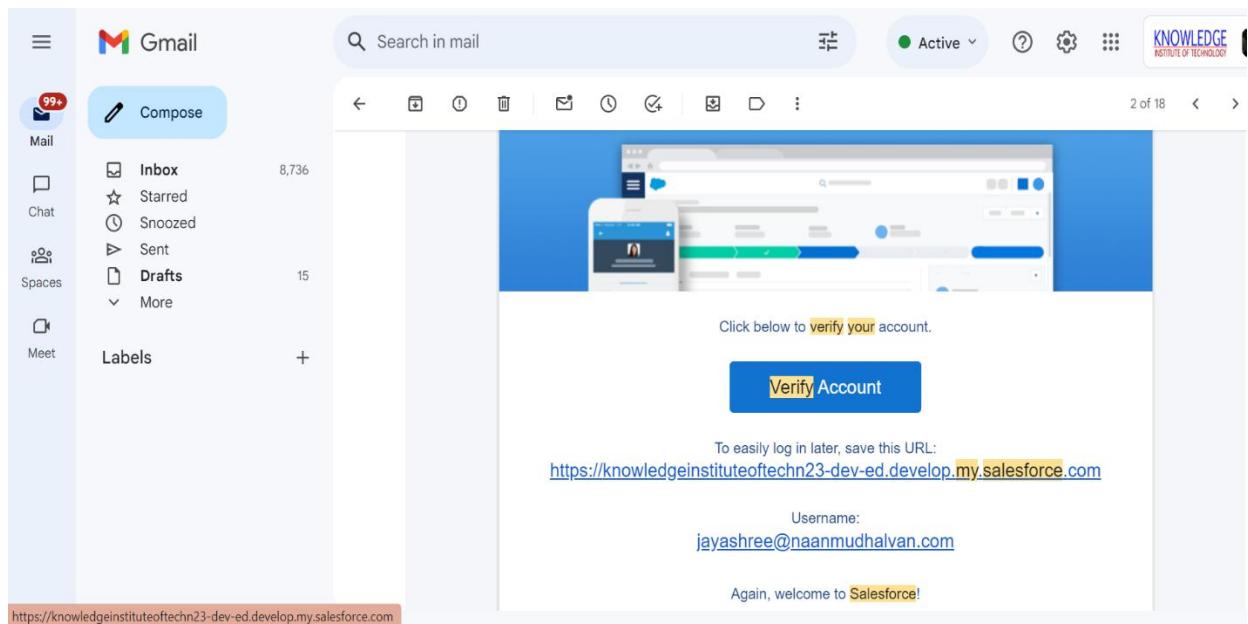
The image consists of two vertically stacked screenshots of the Salesforce Setup interface, specifically the 'Users' section.

**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 (USAR), 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, and Address, all of which are currently empty or not applicable.



**Profile Edit**

**Bmanager**

Name: Bmanager  
User License: Salesforce Platform  
Description:

**Custom App Settings**

|                                      | Visible                  | Default                          |                              | Visible                             | Default                          |
|--------------------------------------|--------------------------|----------------------------------|------------------------------|-------------------------------------|----------------------------------|
| Analytics Studio (standard_Insights) | <input type="checkbox"/> | <input checked="" type="radio"/> | Parent Details (Chandru_s)   | <input checked="" type="checkbox"/> | <input type="radio"/>            |
| App Launcher (standard_AppLauncher)  | <input type="checkbox"/> | <input checked="" type="radio"/> | Platform (standard_Platform) | <input checked="" type="checkbox"/> | <input checked="" type="radio"/> |
| Dreamhouse (Dreamhouse)              | <input type="checkbox"/> | <input checked="" type="radio"/> | WDC (standard_Work)          | <input type="checkbox"/>            | <input type="radio"/>            |

**Service Provider Access**

**Tab Settings**

Overwrite users' personal tab customizations

**Standard Tab Settings**

Home Default On

**Custom Object Permissions**

|                        | Basic Access                        |                                     |                                     |                                     |                                     | Data Administration      |                           |                                     |                                     |                                     |                                     |                                     |                          |
|------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|---------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
|                        | Read                                | Create                              | Edit                                | Delete                              | View All                            | Modify All               |                           | Read                                | Create                              | Edit                                | Delete                              | View All                            | Modify All               |
| Brokers                | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | Sellers                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Childs                 | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | Streaming Channels        | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Parents                | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | User External Credentials | <input type="checkbox"/>            | <input type="checkbox"/> |
| Properties             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | Contact Point Addresses   | <input type="checkbox"/>            | <input type="checkbox"/> |
| Contact Point Consents | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Contact Point Emails      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
| Contacts               | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Push Topics               | <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**

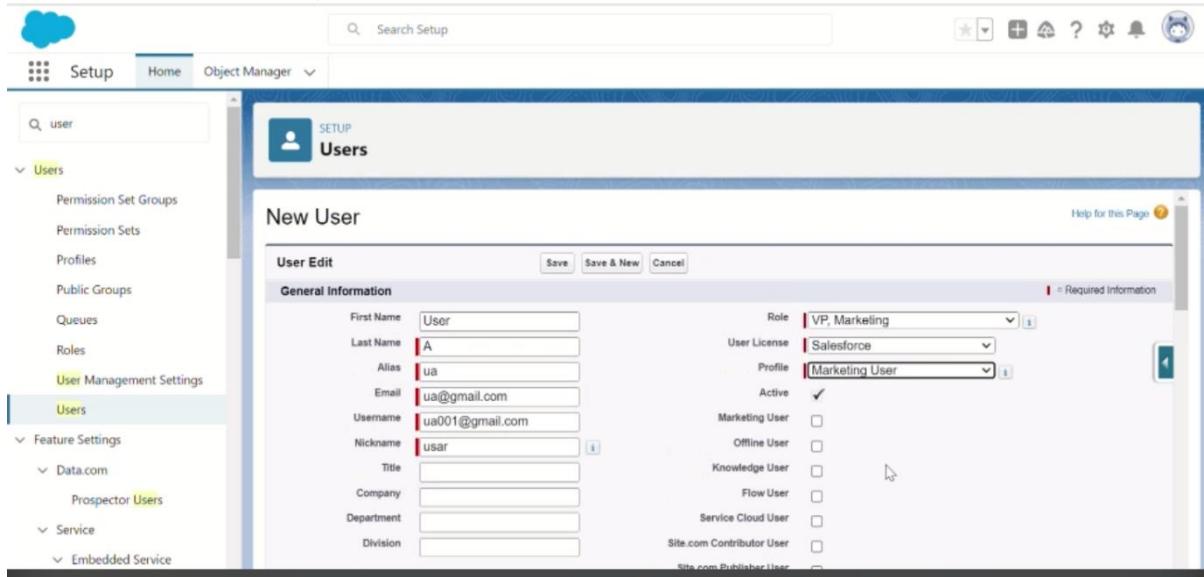
- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10

## For User B:

- Follow the same steps as above but create a separate sharing rule for User B.
- This rule should share records owned by members of "UserA\_Group" with the "UserB\_Group."

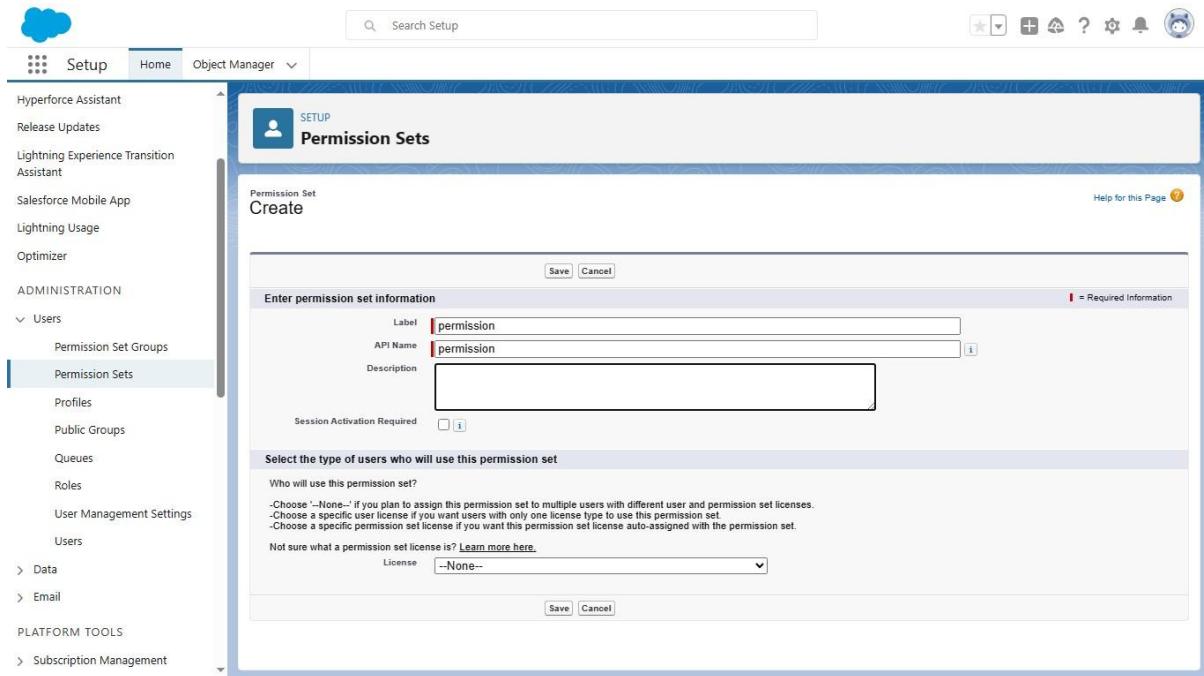
### 3. Define the criteria based on which records should be shared.

### 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 the 'Users' section, 'User Management Settings' 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, Lightning Experience Transition Assistant, and Administration. Under 'Administration', 'Permission Sets' 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.', 'Choose a specific user license if you want users with only one license type to use this permission set.', and 'Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.' A note at the bottom states 'Not sure what a permission set license is? Learn more here.' and a dropdown menu for 'License' is shown with '-None-' selected. 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 the "Users" section, "Permission Sets" 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, a table titled "Selected Users" lists a single user named "Jagadeesh A". The user details include Full Name (Jagadeesh A), Role (Manager), Status (Active), User License (Salesforce Platform), and Expire On (Never Expires). At the bottom right 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 interface. It displays a single row of data for a user named 'Deborah A.' who has been assigned to the 'Salesforce Platform' license. The status of the assignment is 'Success'. The page includes a header with the title 'PERMISSION permission' and a green banner indicating '1 assignments were successful.'

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 interface. It lists various objects and their current access levels. The objects include Operating Hours Holidays, Opportunities, Opportunity Contact Role, Opportunity Product, Order Products, Orders, Parents, Party Consents, Payment Authorization Adjustments, Payment Authorizations, Payment Gateway Logs, Payment Gateways, Payment Groups, Payment Line Invoices, Payments, Pending Order Summaries, Pending Order Summary Processed Events, Price Book Entries, Price Books, Privacy Consents, Problem Related Items, Problems, Process Cart Pricing Events, Process Cart Pricing Response Events, Process Exceptions, Product Attributes, and Product Attribute Set Products. The access levels shown are No Access, --, and /.

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 shows a success message: "... > PERMISSION S ... permission" with a checkmark icon and the text "1 assignments were successful." Below this is an "Assignment Summary" table 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' ('Must include alpha and numeric characters'), 'Password question requirement' ('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 'Analytics Studio (standard\_Insights)' and 'App Launcher' under 'Visible' and 'Default' columns, and 'Platform (standard\_Platform)' and 'WDC (standard\_Work)' under 'Visible' and 'Default' columns. A note at the bottom right indicates 'Required Information' with a red asterisk.

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 'Users' selected.

The main content area is titled 'SETUP Users' and shows the 'General Information' page for a user. The page includes a note: 'Required Information' (indicated by a red exclamation mark). The user's information is filled in the fields:

| Field      | Value                       | Note |
|------------|-----------------------------|------|
| First Name | JAYASHREE                   |      |
| Last Name  | A                           |      |
| Alias      | JA                          |      |
| Email      | 2k20csbs14@kiot.ac.in       |      |
| Username   | jayashree@naanmudhalvar     |      |
| Nickname   | jayashree                   |      |
| Title      |                             |      |
| Company    | Knowledge Institute of Tech |      |
| Department |                             |      |
| Division   |                             |      |

On the right side, there is a list of user roles with checkboxes:

- Role: <None Specified>
- User License: Salesforce
- Profile: System Administrator
- Active:
- Marketing User:
- Offline User:
- Knowledge User:
- Flow User:
- Service Cloud User:
- Site.com Contributor User:
- Site.com Publisher User:
- WDC User:
- Mobile Push Registrations: View
- 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. Below this, there's a search bar for 'Users' and two lists: 'Available Members' and 'Selected Members'. The 'Available Members' list contains several user entries, and the 'Selected Members' list currently contains none.

## 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 of the listed permission sets include 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', 'Facility Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order Management Agent', 'Order Management Operations Manager', and 'Order Management Shopper'. Each entry provides a brief description of the permissions granted and the license required.

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' (set to 'permission01'), 'API Name' (set to 'permission01'), 'Description' (empty), and 'Session Activation Required' (unchecked). 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, all of which have checkboxes checked under 'Enabled'. Below this is a section for 'Field Permissions' with a table showing 'Field Name' (Account Name, Account Number, Account Owner, Account Site, Account Source, Active, Annual Revenue) and 'Read Access' and 'Edit Access' checkboxes. Most checkboxes are checked for both access types across most fields.

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:

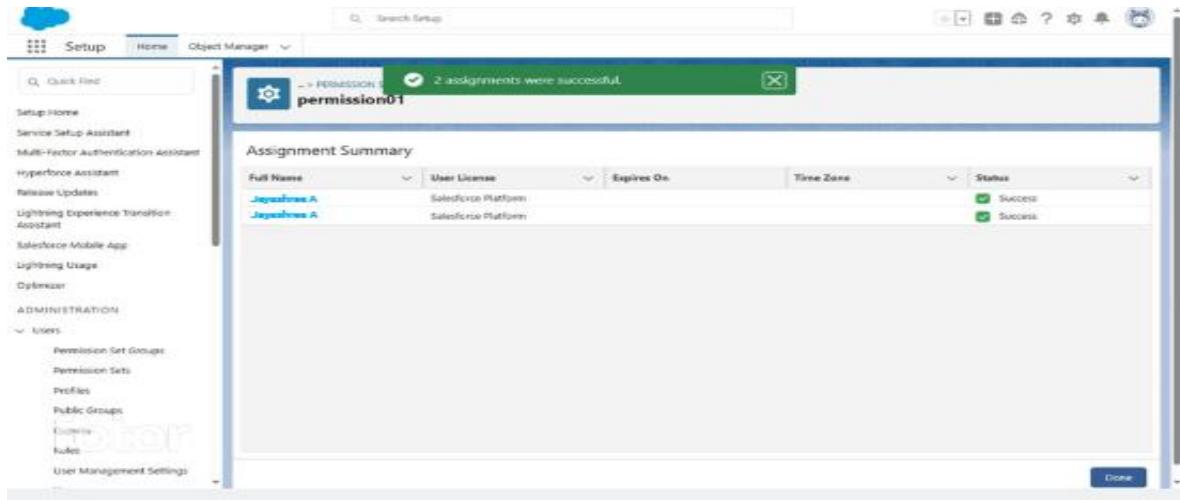
| Permission Name | Enabled                             |
|-----------------|-------------------------------------|
| Read            | <input checked="" type="checkbox"/> |
| Create          | <input type="checkbox"/>            |
| Edit            | <input checked="" type="checkbox"/> |
| Delete          | <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.

| 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                |  | Survey Result Name | Name             | Auto Number        | ✓                 |         |
| Search Layouts                        |  |                    |                  |                    |                   |         |
| 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**

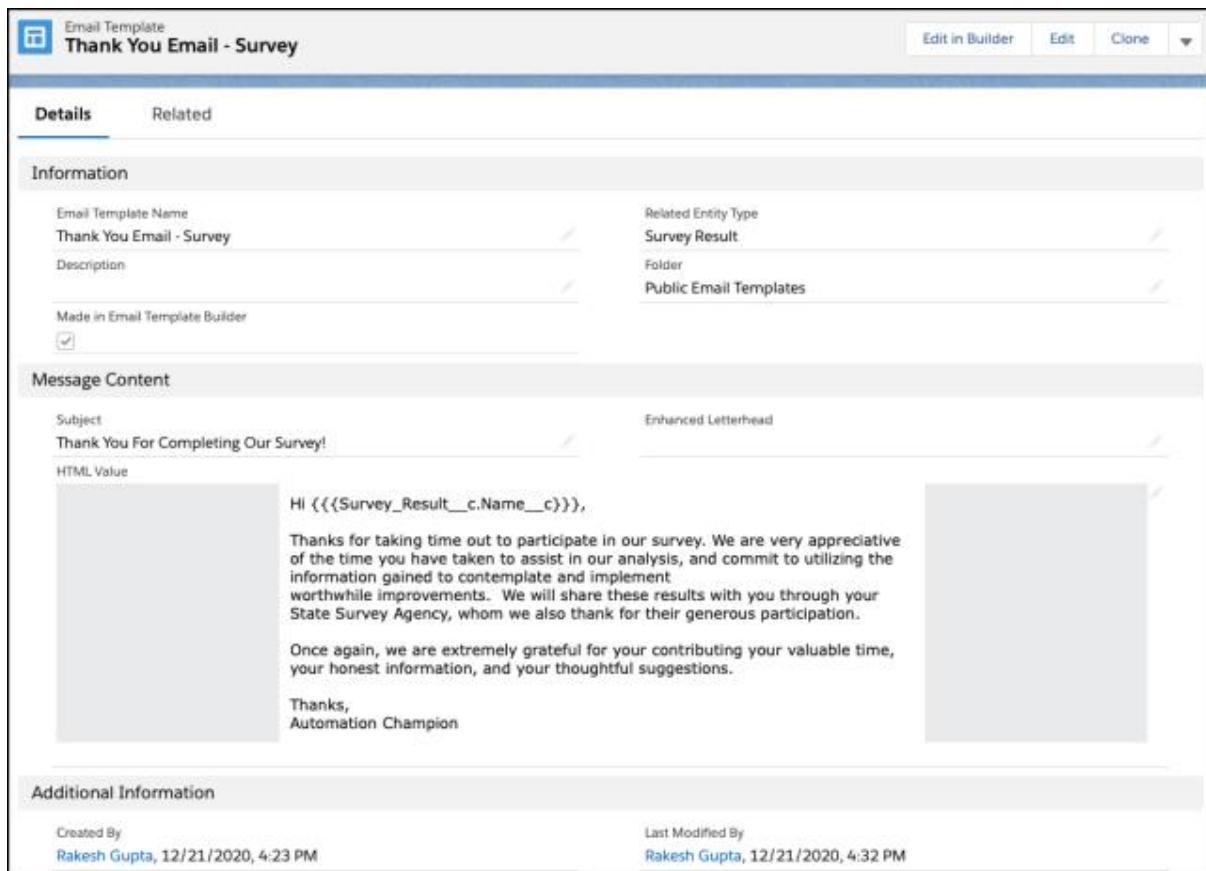
Subject: Thank You For Completing Our Survey!  
Enhanced Letterhead

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<br>User: Rakesh Gupta<br>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

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

Survey Result

Set Field Values for the Survey Result

| Field      | Value                                |
|------------|--------------------------------------|
| Comment__c | ← A_a Comment X                      |
| Email__c   | ← A_a Email > Value X                |
| Name__c    | ← {!Name.firstName} {!Name.lastName} |
| Rating__c  | ← A_a Rating X                       |

+ Add Field

Manually assign variables

Cancel 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 href="#">A New Version</a>  | <a href="#">A New Flow</a>                                    |                             |
| <b>* Flow Label</b><br><input type="text" value="Survey"/>   | <b>* Flow API Name</b><br><input type="text" value="Survey"/> |                             |
| <b>Description</b><br><input type="text"/>   |   |                             |
| <a href="#">Hide Advanced</a>  |   |                             |
| <b>How to Run the Flow</b> ⓘ<br><input type="text" value="User or System Context—Depends on How Flow is Launched"/>              |   |                             |
| <b>* Type</b><br><input type="text" value="Screen Flow"/>  |   |                             |
| <b>* API Version for Running the Flow</b><br><input type="text" value="51"/>   |   |                             |
| <b>Interview Label</b> ⓘ<br><input type="text" value="Survey {!\$Flow.CurrentDateTime}"/>  |   |                             |
| <b>Last Modified</b><br>12/21/2020, 4:54 PM by Rakesh Gupta  |   |                             |
| <b>Status:</b><br><span style="background-color: green; color: white; border-radius: 50%; padding: 2px 5px;">Active</span>       | <b>Type:</b><br>Screen Flow                                   | <b>Version Number:</b><br>2 |
| <a href="#">Cancel</a> <a href="#" style="background-color: blue; color: white; border-radius: 5px; padding: 2px 10px;">Save</a> |   |                             |

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

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]

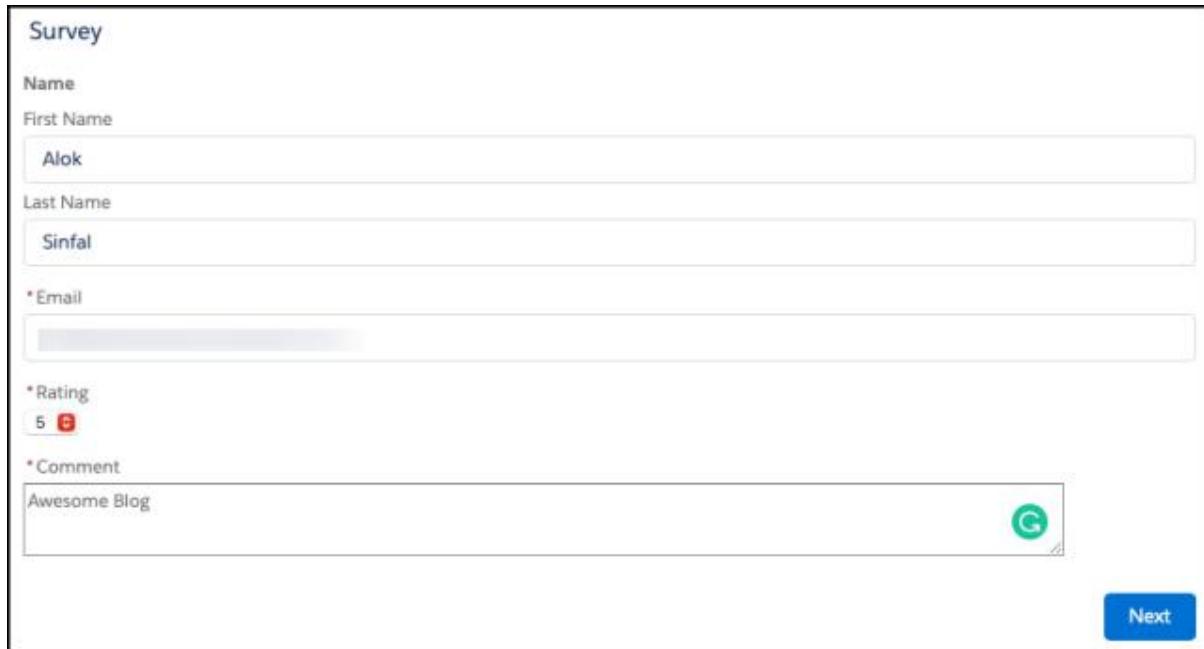
\*Rating

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.