NAAN MUDHALVAN
SALESFORCE DEVELOPER(COURSE)
ASSIGNMENT NO 1

NAME : ABITHA A

NAAN MUDHALVAN ID : AU611420104002

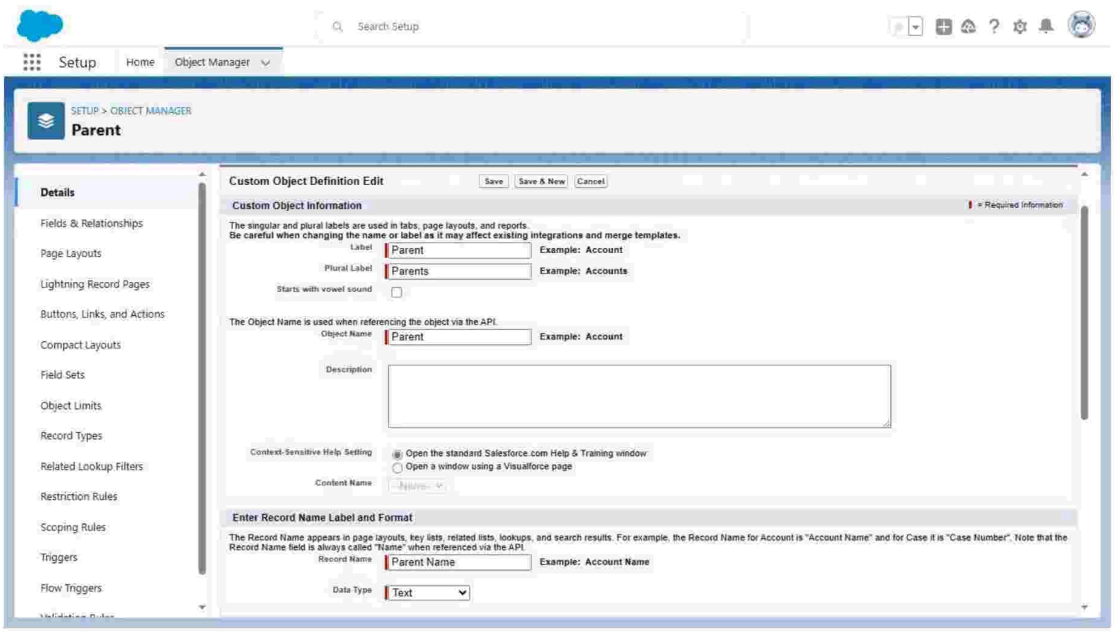
YEAR & DEP : IV YEAR & CSE

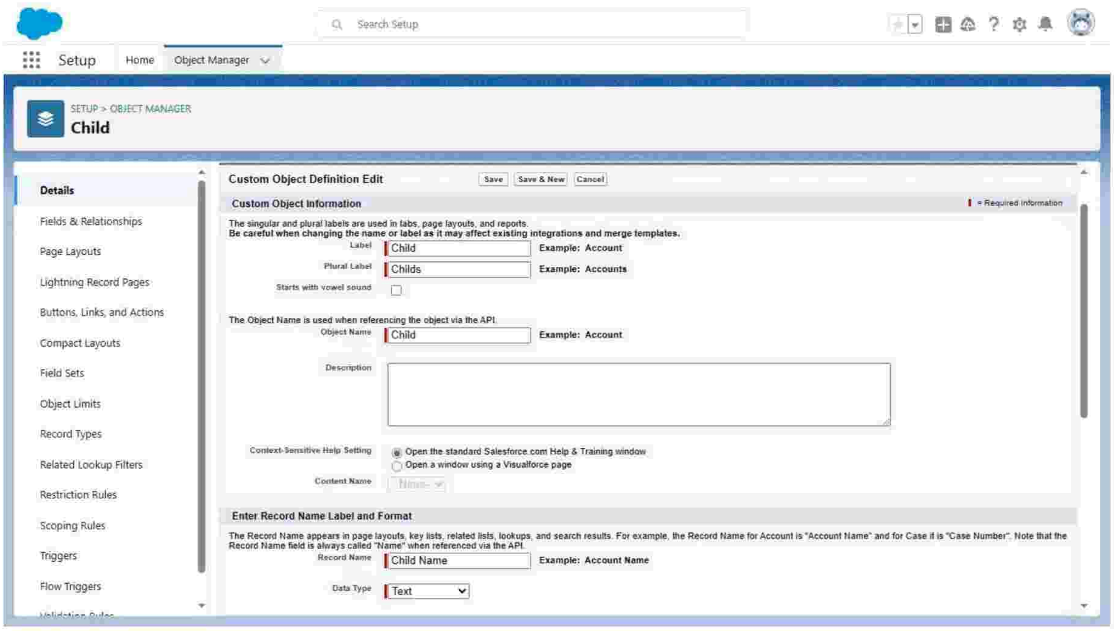
BATCH : 2024

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:

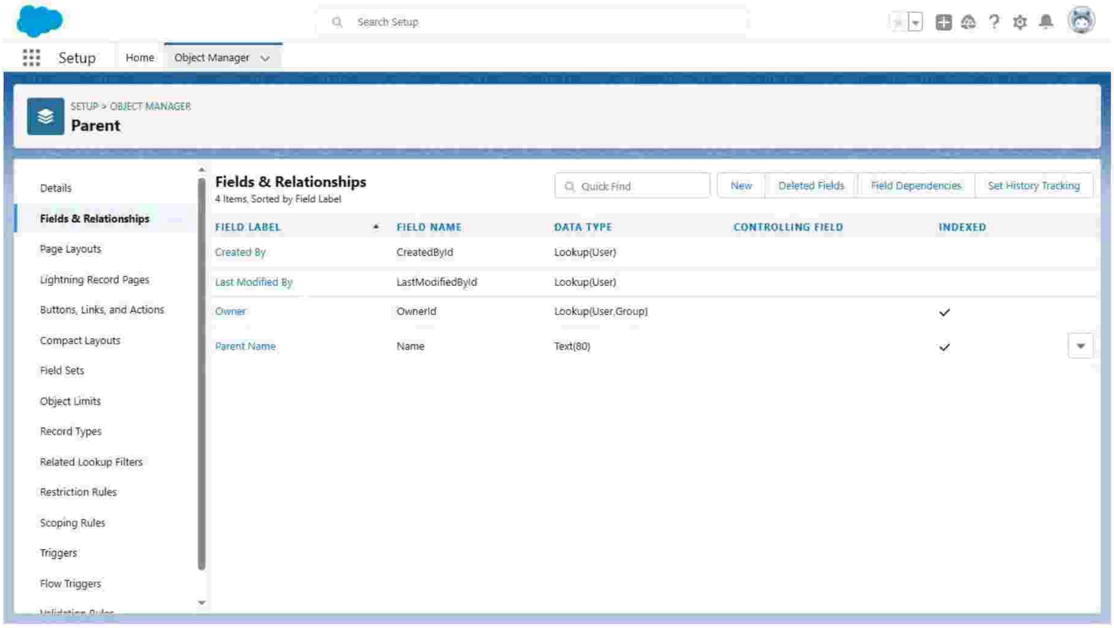
STEP 1: CREATE CUSTOM OBJECTS.





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.



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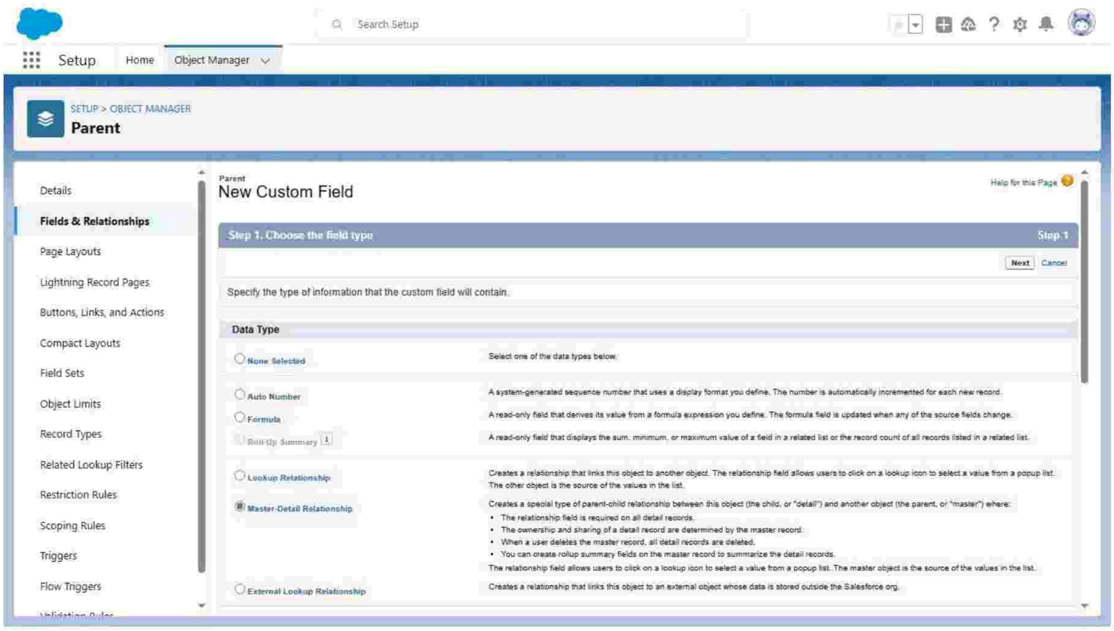

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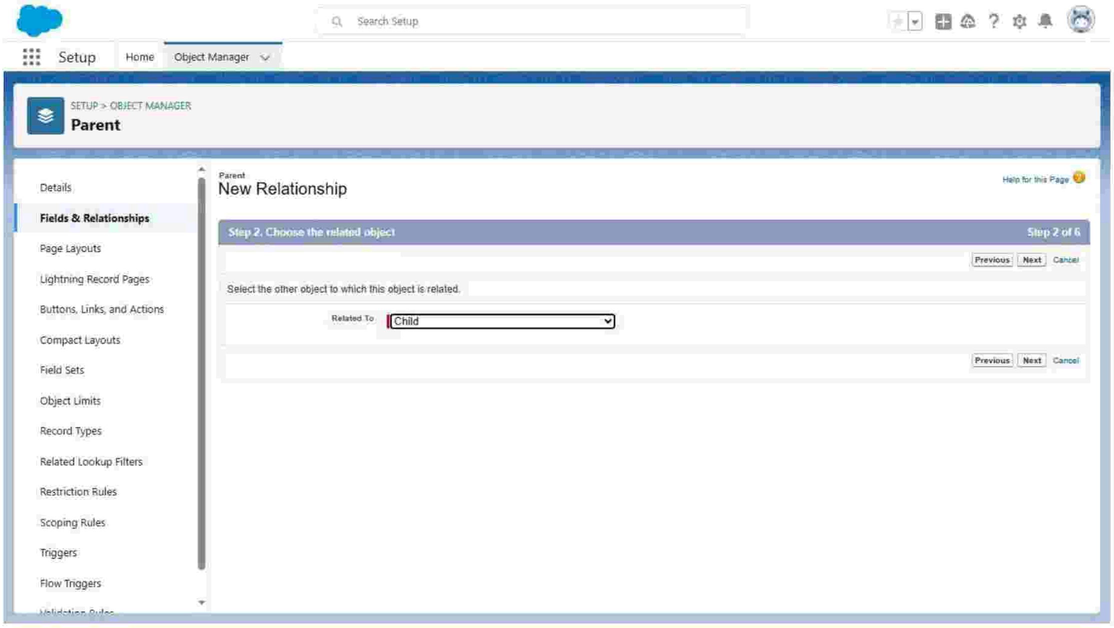
Parent
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
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.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
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.
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.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.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Step 2. Choose the related object
Step 2 of 6
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Cancel
Select the other object to which this object is related.
Related To
Child
Previous
Next
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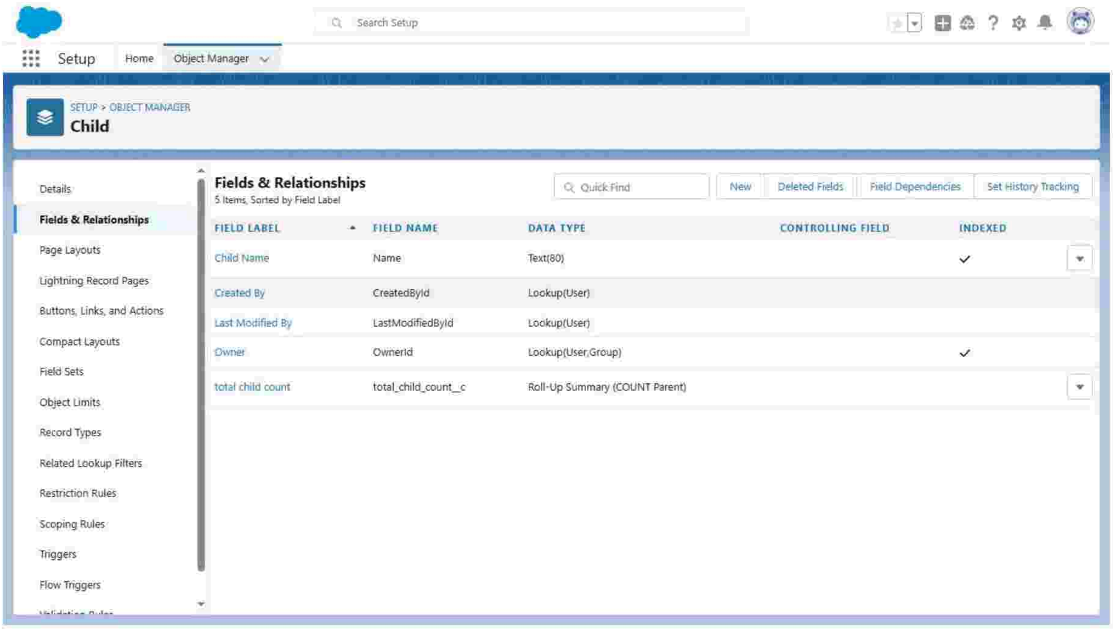
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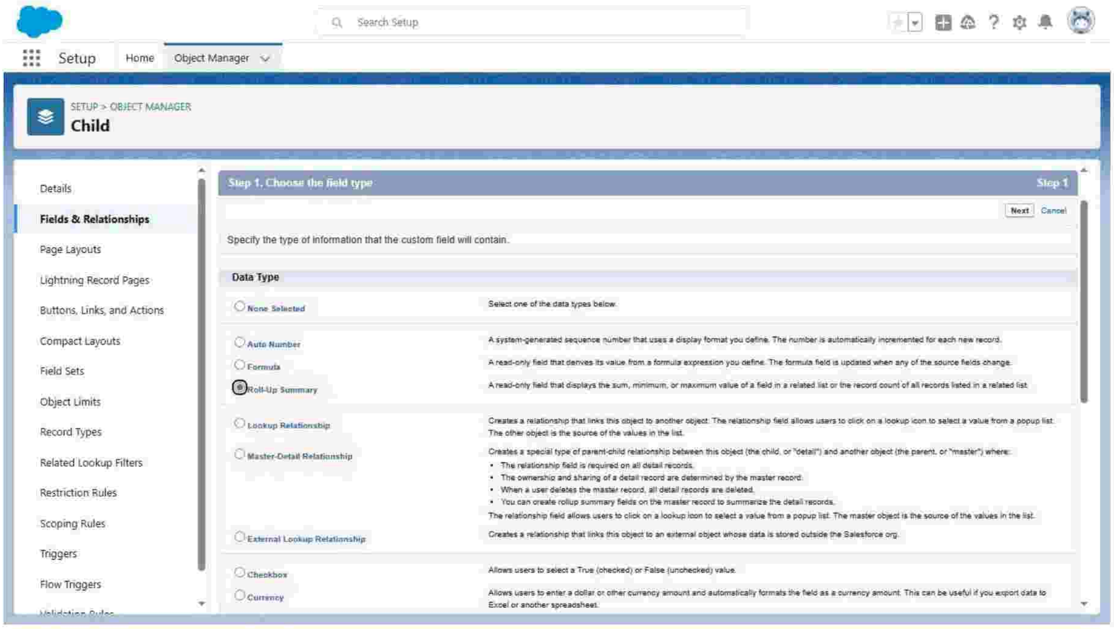
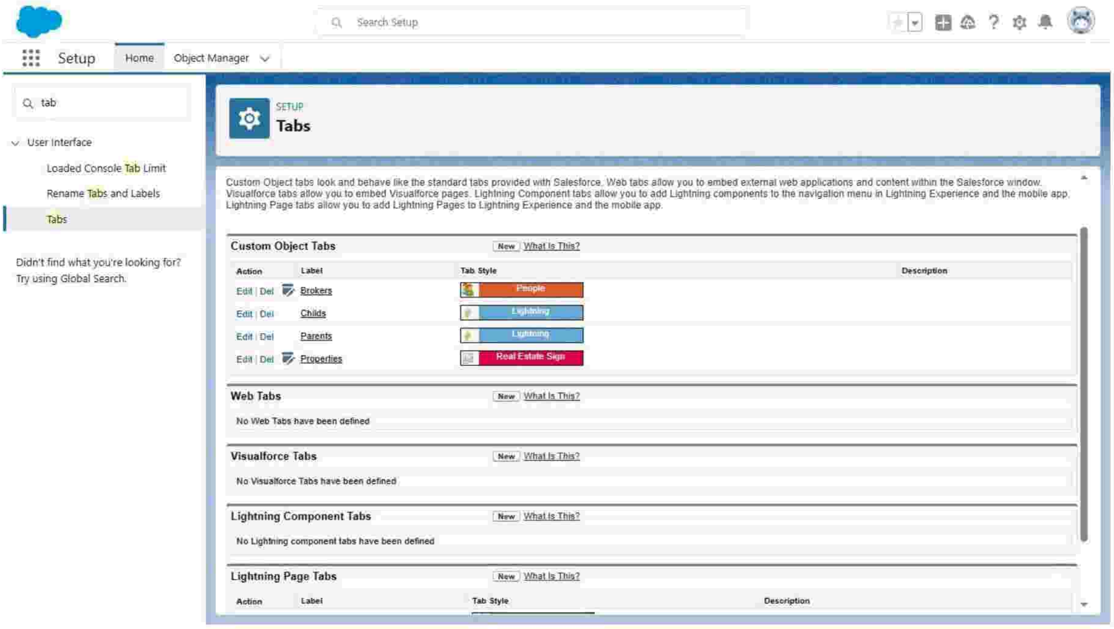
total child count
total_child_count__c
Roll-Up Summary (COUNT Parent)



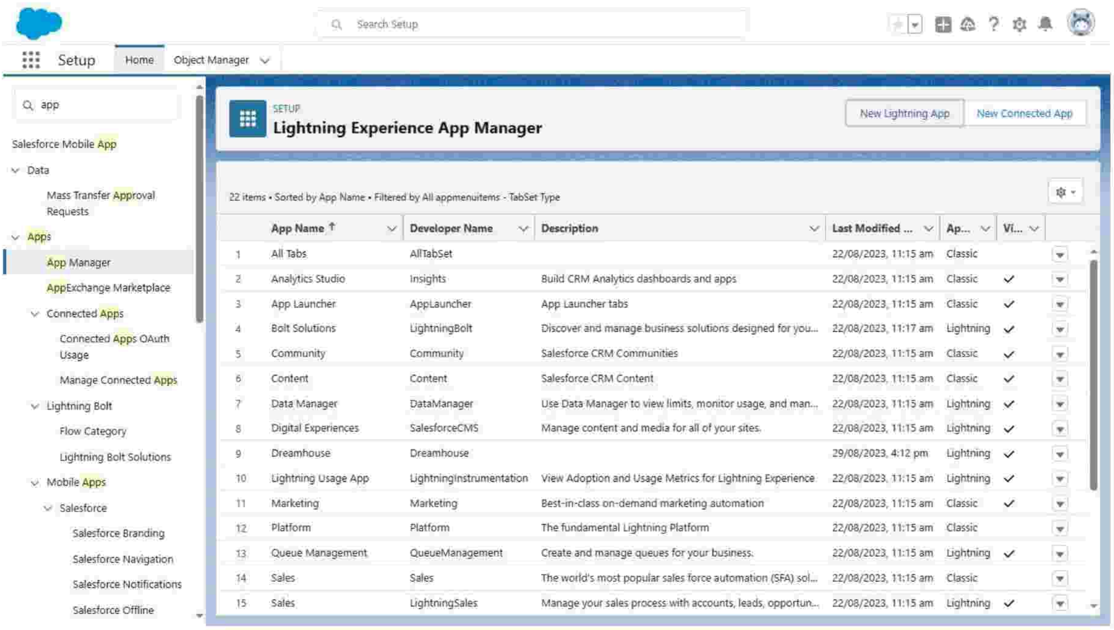
STEP 3: CREATE A ROLL-UP SUMMARY FIELD

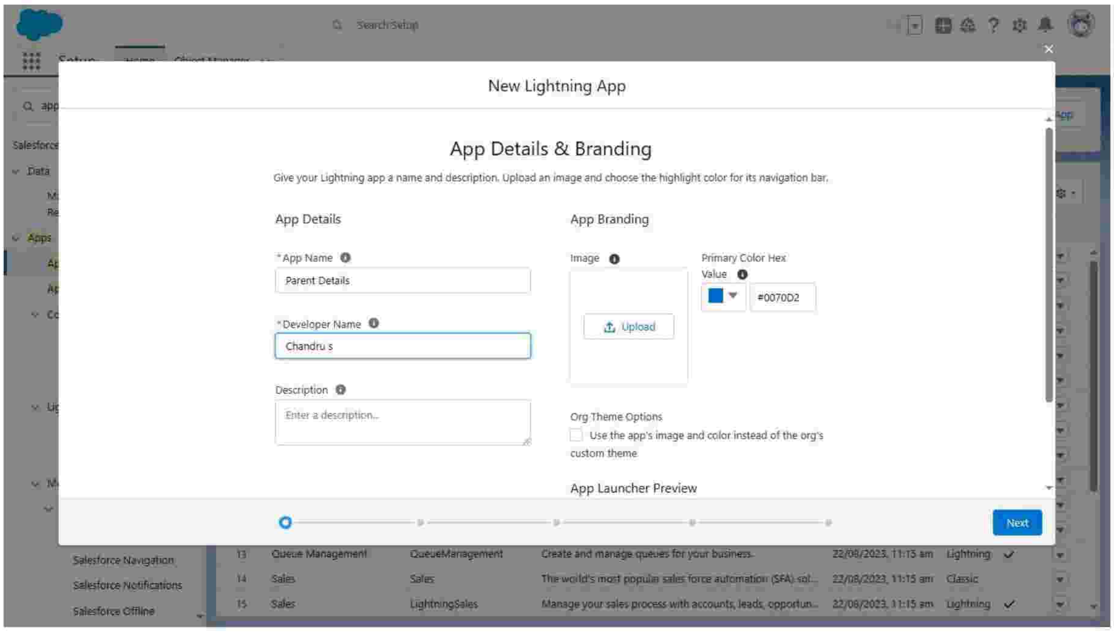
1. IN THE SAME "PARENT" EDITING PAGE, SCROLL DOWN TO THE "ROLL-UP SUMMARY FIELDS" SECTION.
2. CLICK "NEW ROLL-UP SUMMARY FIELD."
3. CHOOSE THE "CHILD" AS THE CHILD OBJECT FOR WHICH YOU WANT TO CALCULATE THE TOTAL.
4. GIVE YOUR ROLL-UP SUMMARY FIELD A NAME (E.G., "TOTAL_CHILD_RECORDS__C").
5. CHOOSE THE 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.

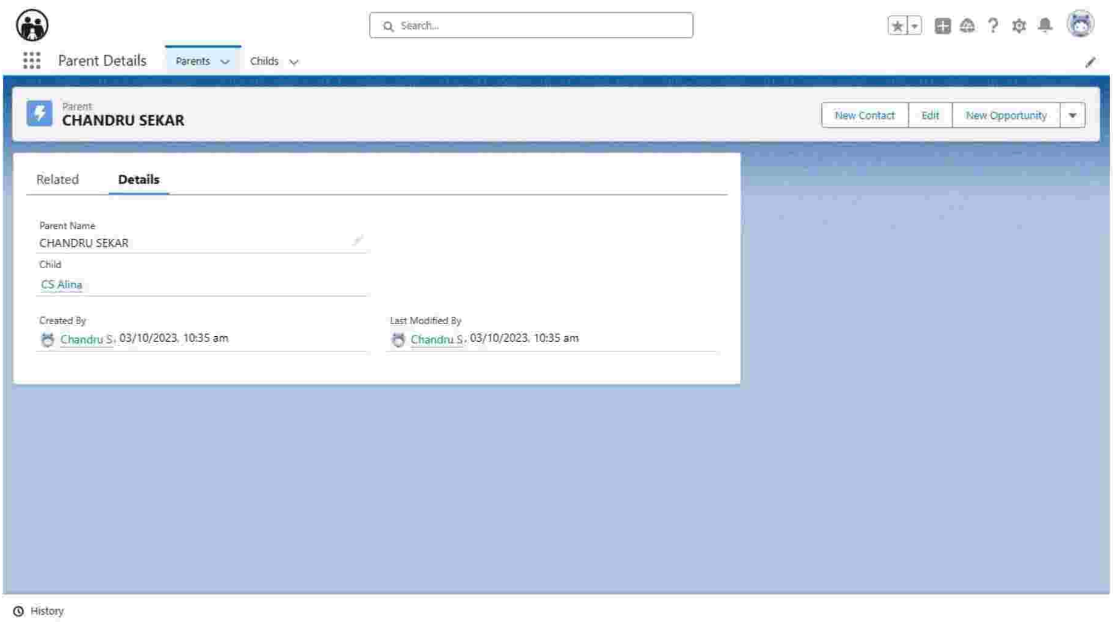




STEP 5: TEST THE RELATIONSHIP AND ROLL-UP SUMMARY FIELD

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 IS 2 USER, USER A AND USER B IN THE ORGANISATION 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 TH SECURITY FOR THE USERS.

STEP 1: CREATE A PUBLIC GROUP

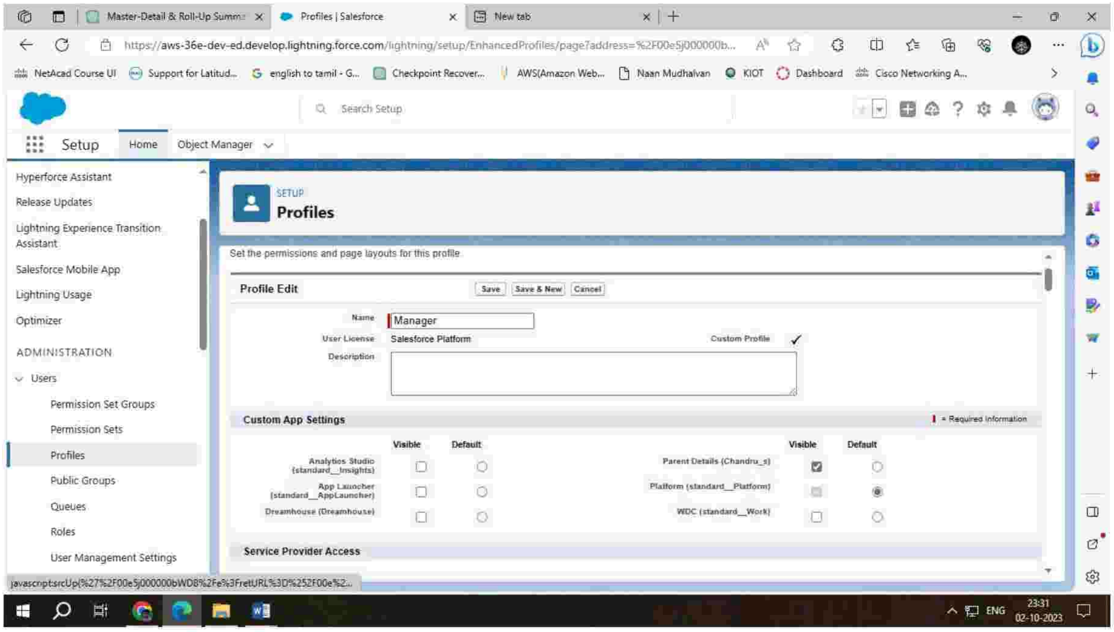
1. GO TO "SETUP" IN SALESFORCE.

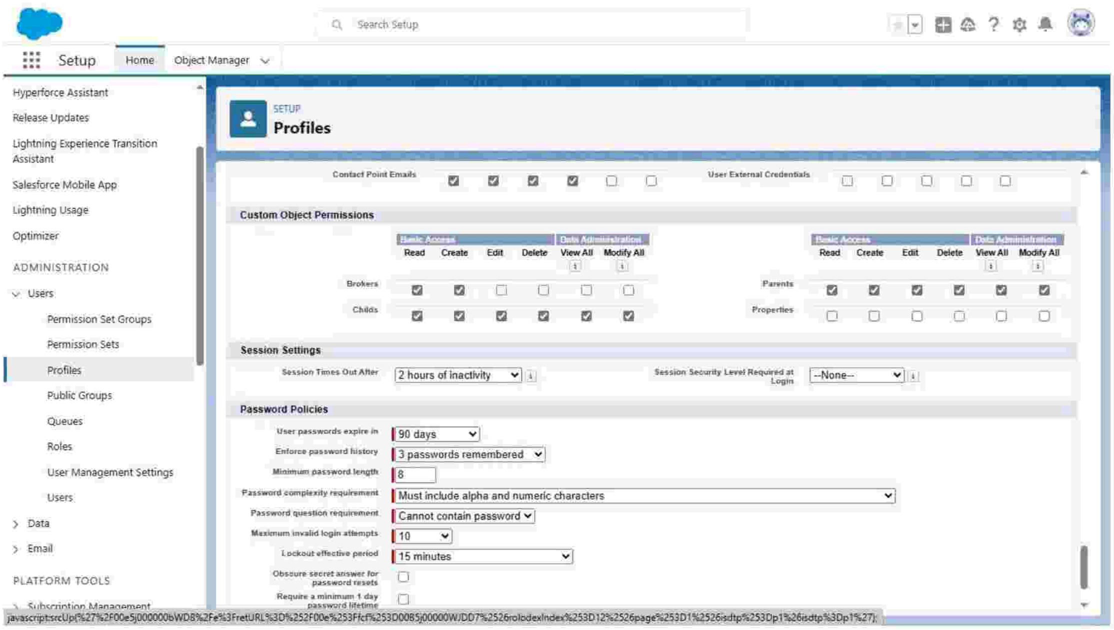
2. IN THE QUICK FIND BOX, TYPE "PUBLIC GROUPS" AND SELECT IT.

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.

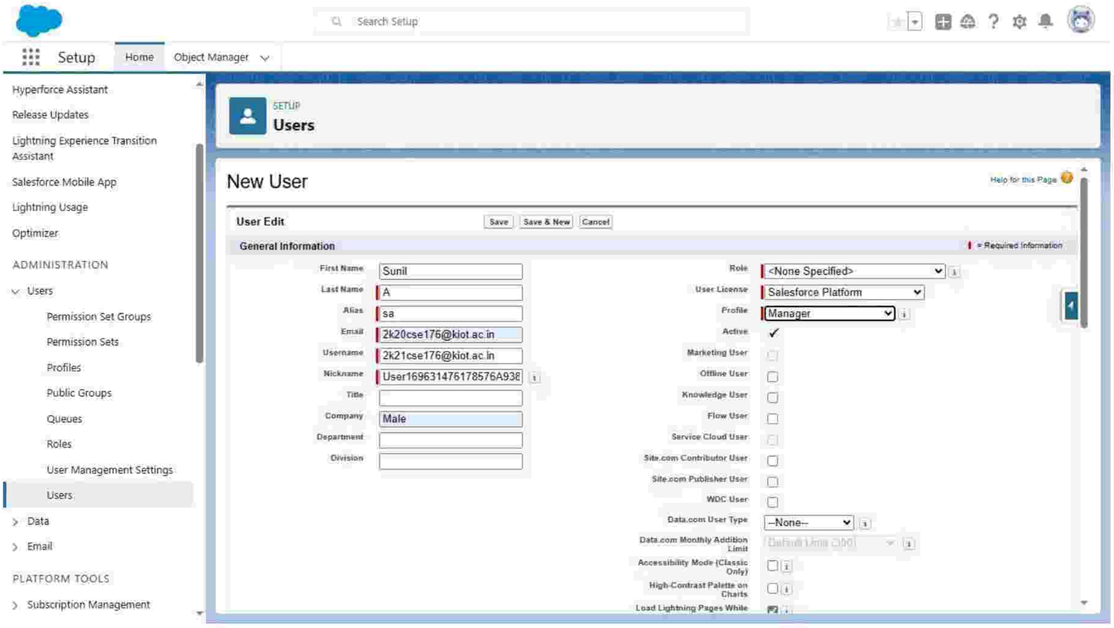
2. IN THE QUICK FIND BOX, TYPE "SHARING RULES" AND SELECT "SHARING SETTINGS."

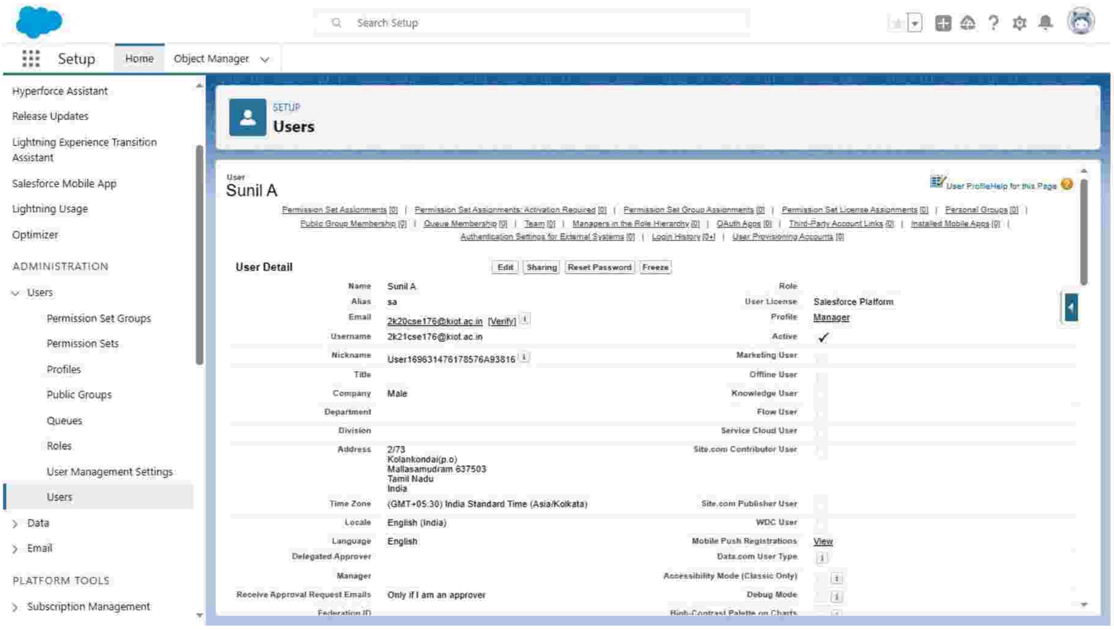
3. UNDER "ACCOUNT SHARING RULES," CLICK ON "NEW SHARING RULE."

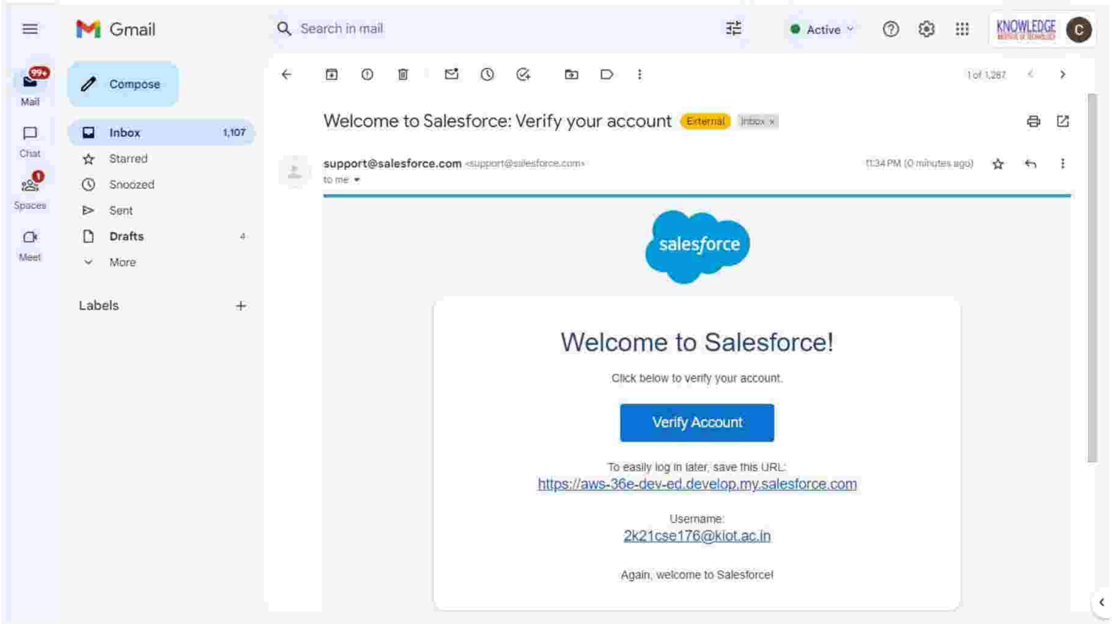
4. CREATE A RULE THAT SHARES RECORDS OWNED BY MEMBERS OF "USERB_GROUP" WITH THE "USERA_GROUP."

5. DEFINE THE CRITERIA BASED ON WHICH RECORDS SHOULD BE SHARED (E.G., OWNERSHIP).

6. SAVE THE SHARING RULE.



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1 of 1,287
Welcome to Salesforce: Verify your account External Inbox
support@salesforce.com <support@salesforce.com>
to me
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salesforce
Welcome to Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
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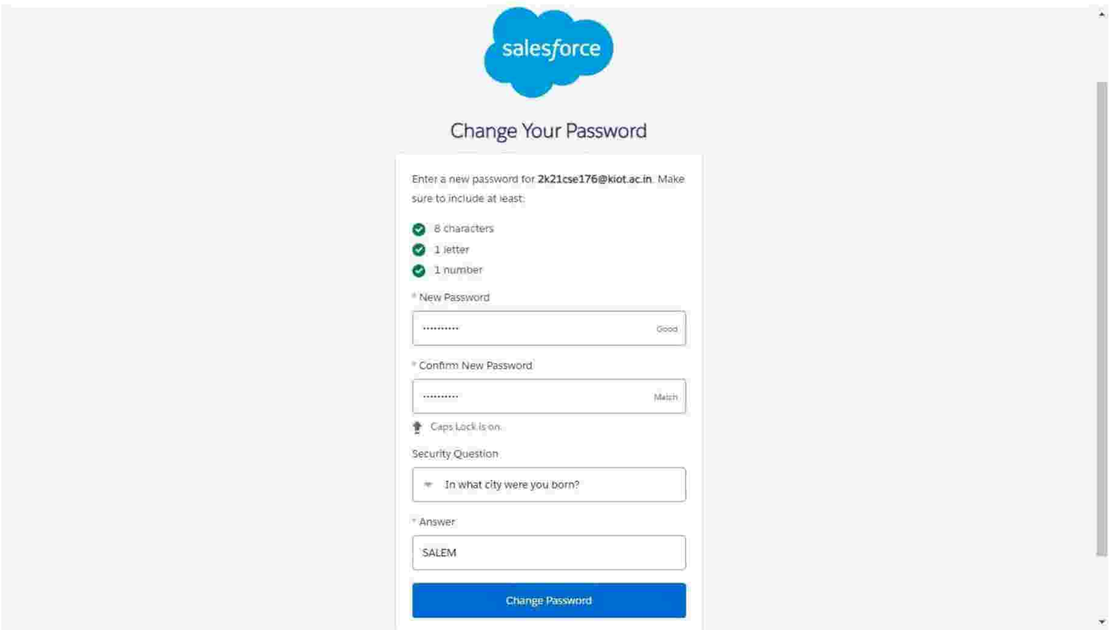
Again, welcome to Salesforce!


salesforce
Change Your Password
Enter a new password for 2k21cse176@kiot.ac.in. Make sure to include at least:
8 characters
1 letter
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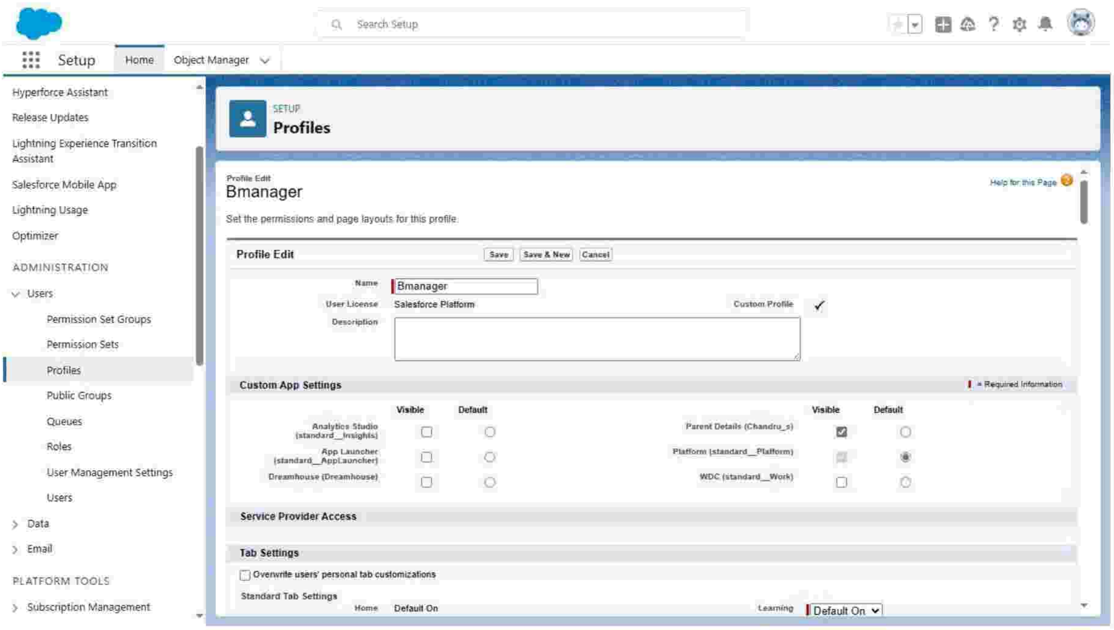
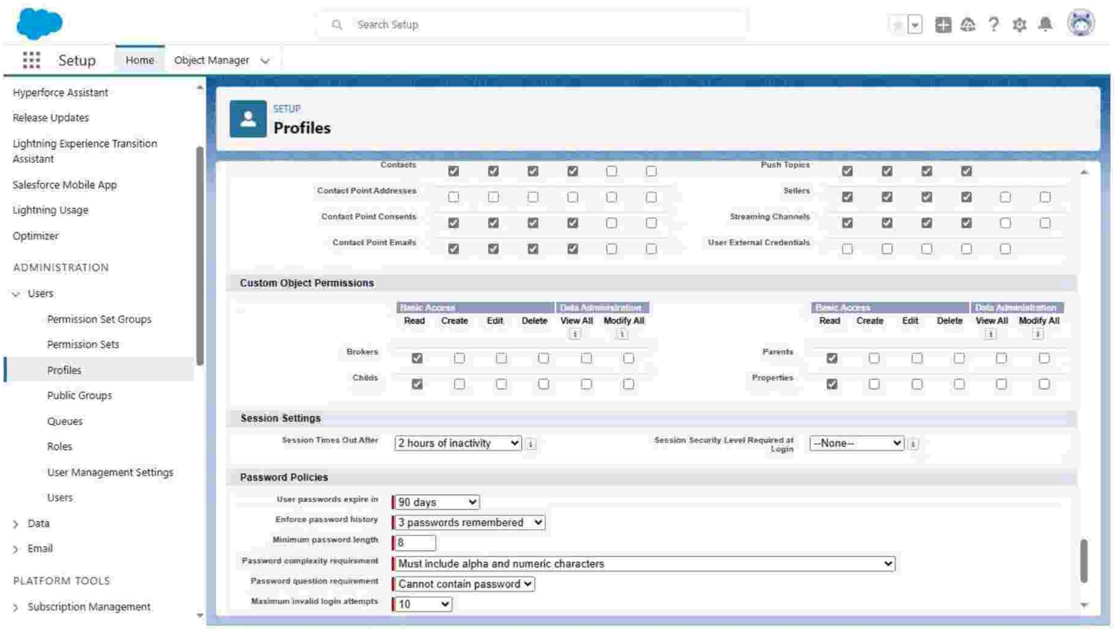




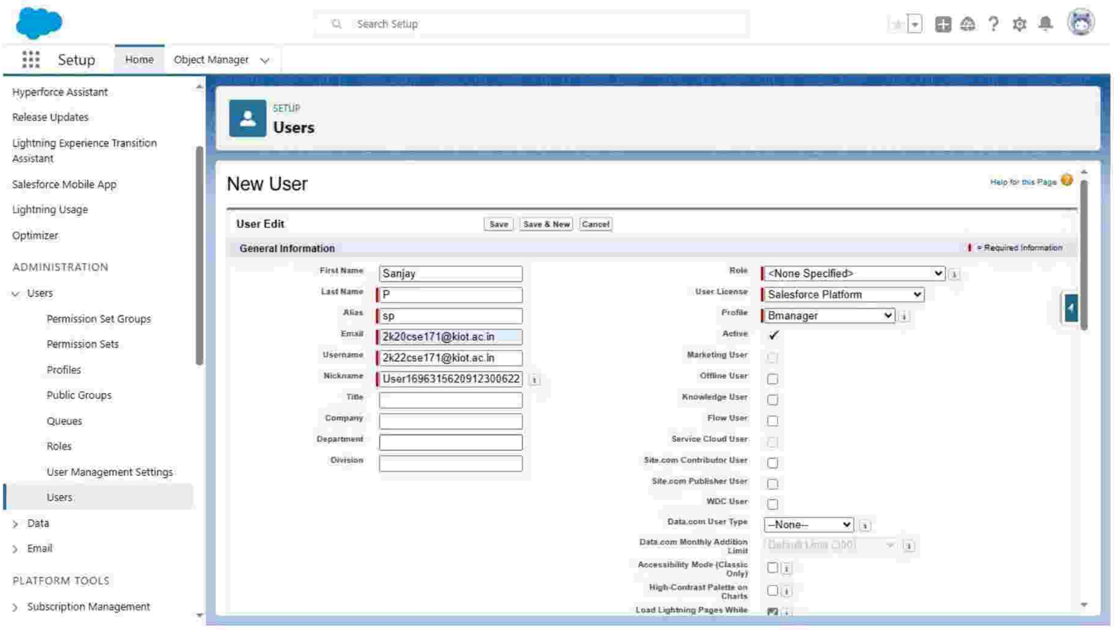
FOR USER B:

1. FOLLOW THE SAME STEPS AS ABOVE BUT CREATE A SEPARATE SHARING RULE FOR USER B.

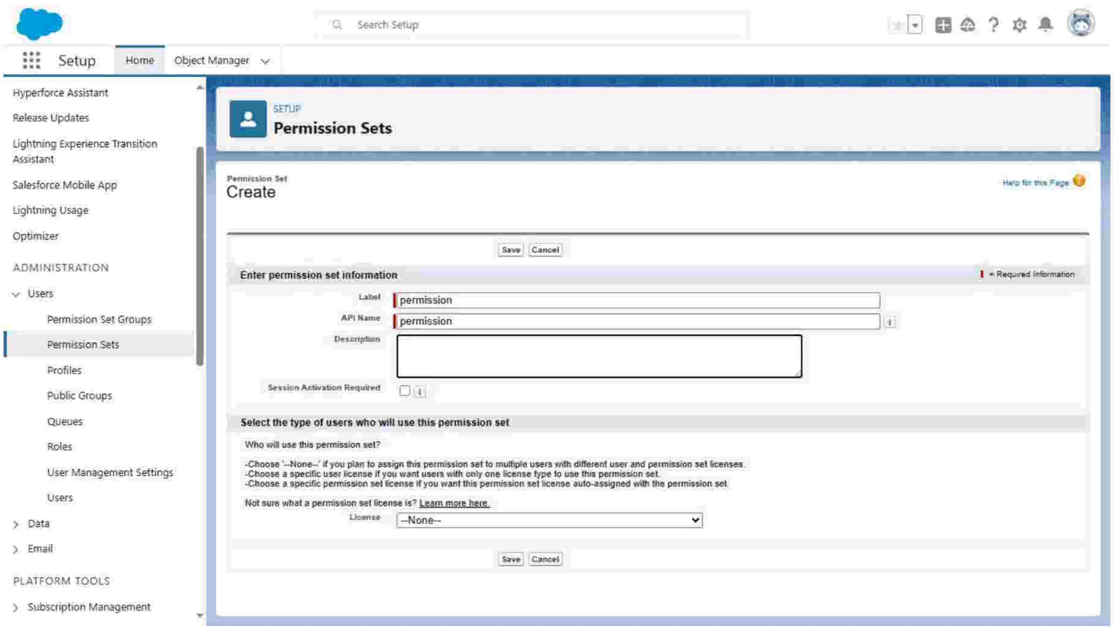
2. THIS RULE SHOULD SHARE RECORDS OWNED BY MEMBERS OF "USERA_GROUP" WITH THE "USERB_GROUP."

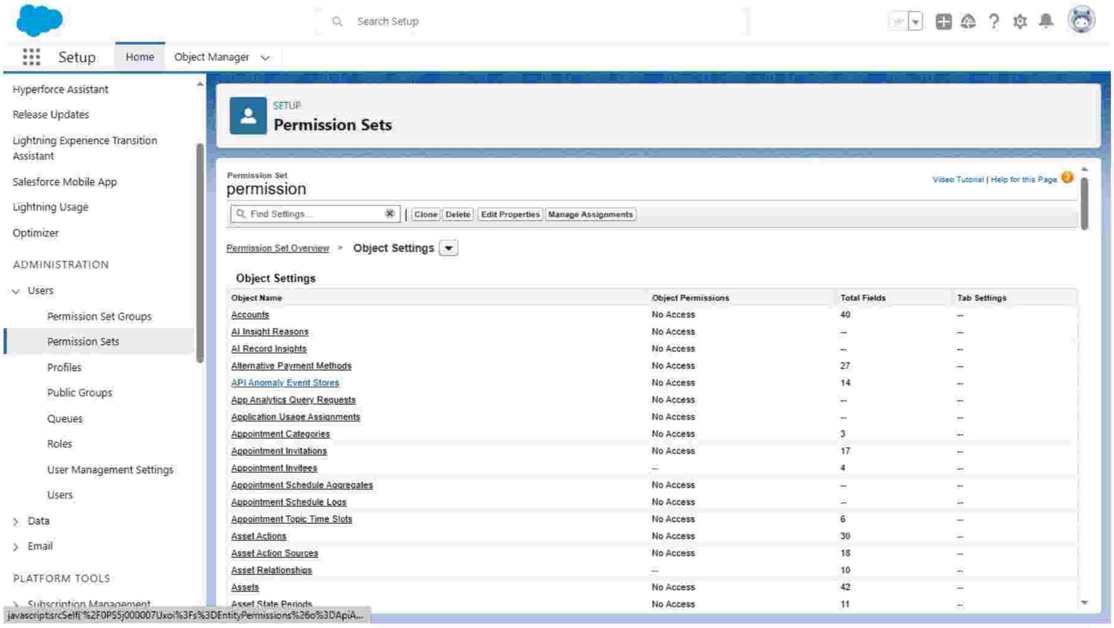
3. DEFINE THE CRITERIA BASED ON WHICH RECORDS SHOULD BE SHARED.

4. SAVE THE SHARING RULE.



STEP 3: ASSIGN RECORDS OWNERSHIP

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AI Insight Reasons No Access -- --
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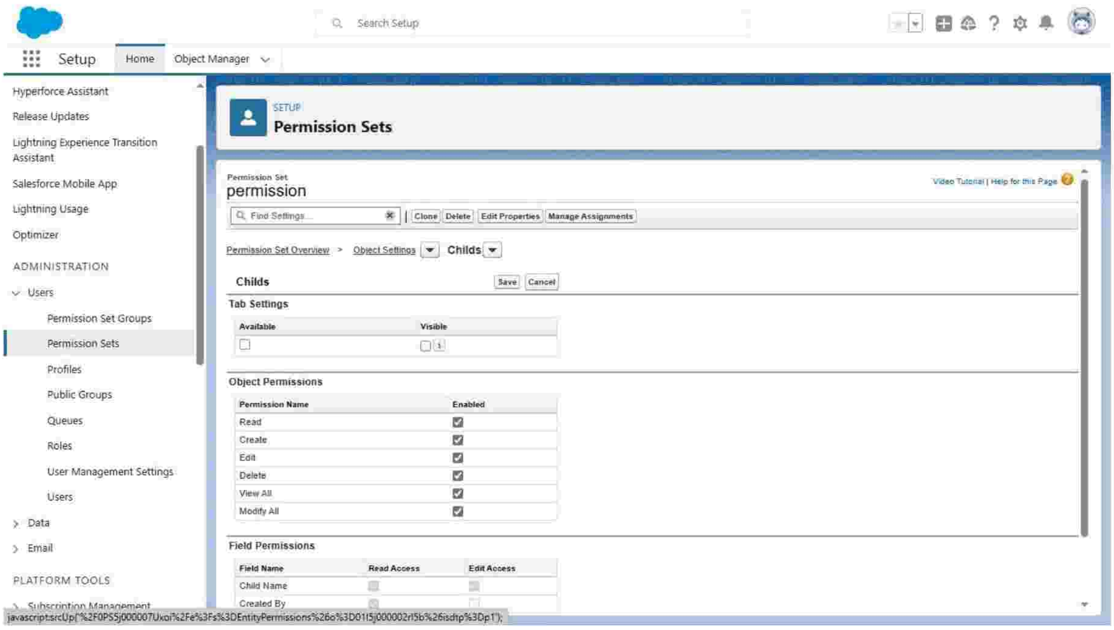
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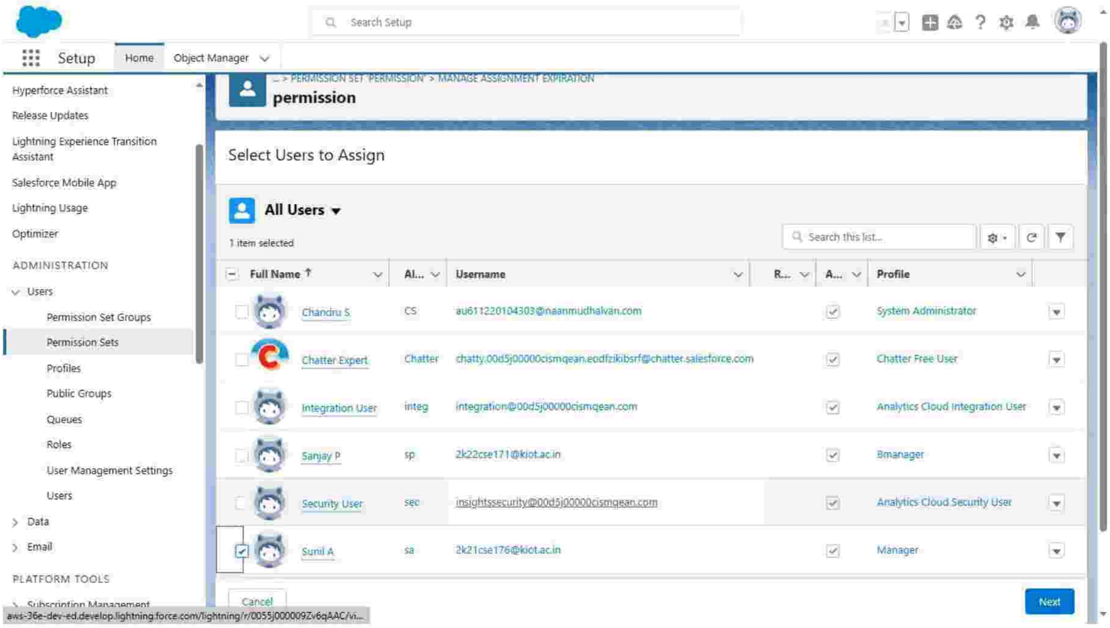

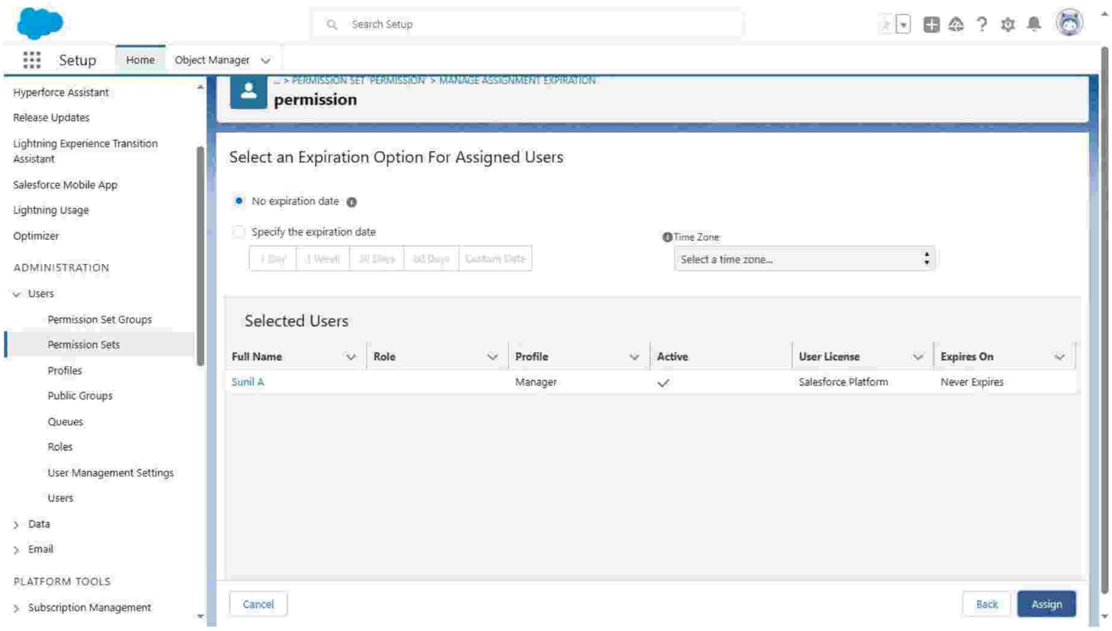

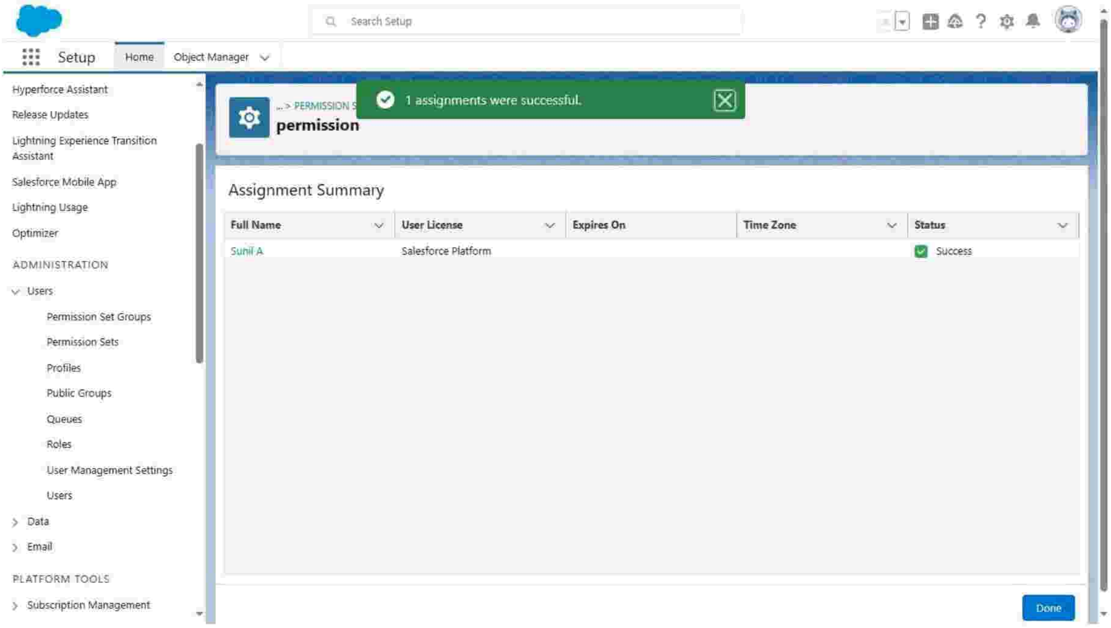
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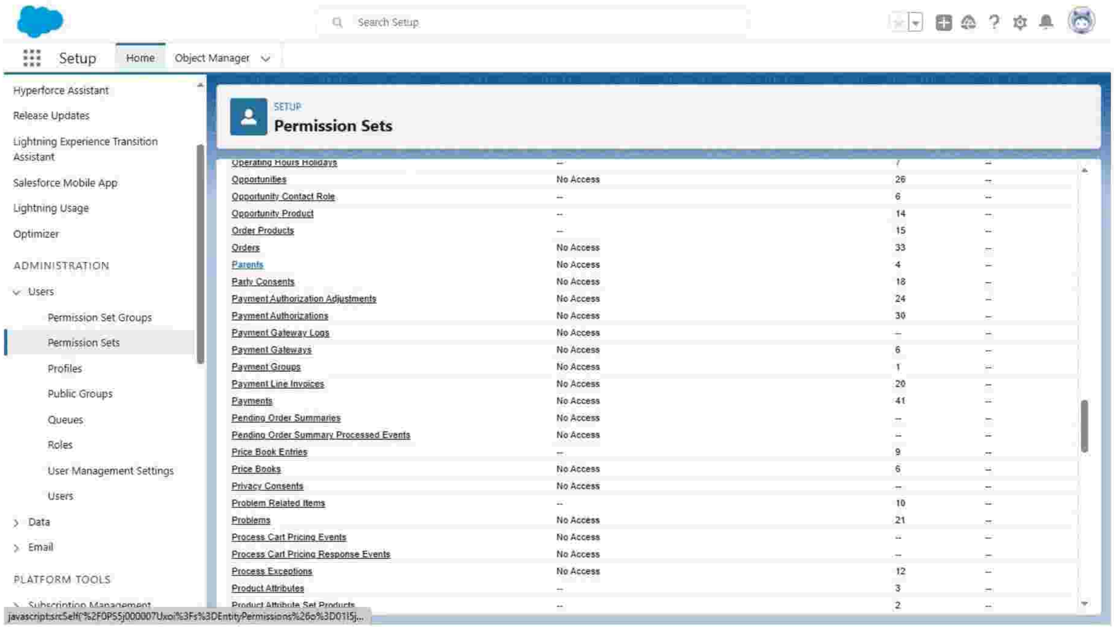
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Payment Groups No Access 1 --
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Payments No Access 41 --
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Pending Order Summary Processed Events No Access -- --
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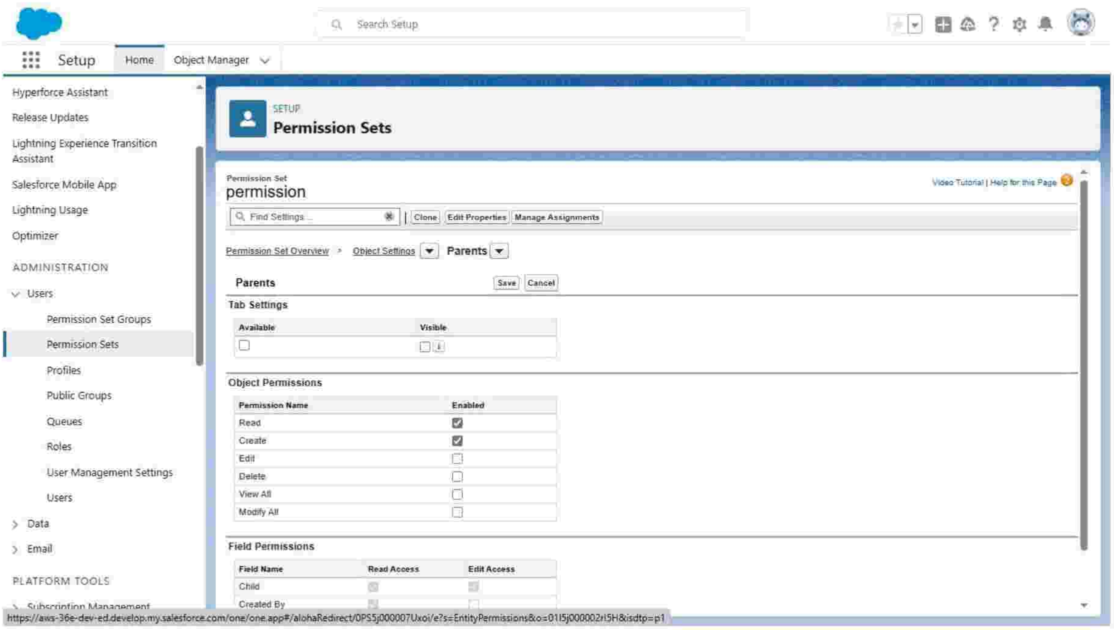
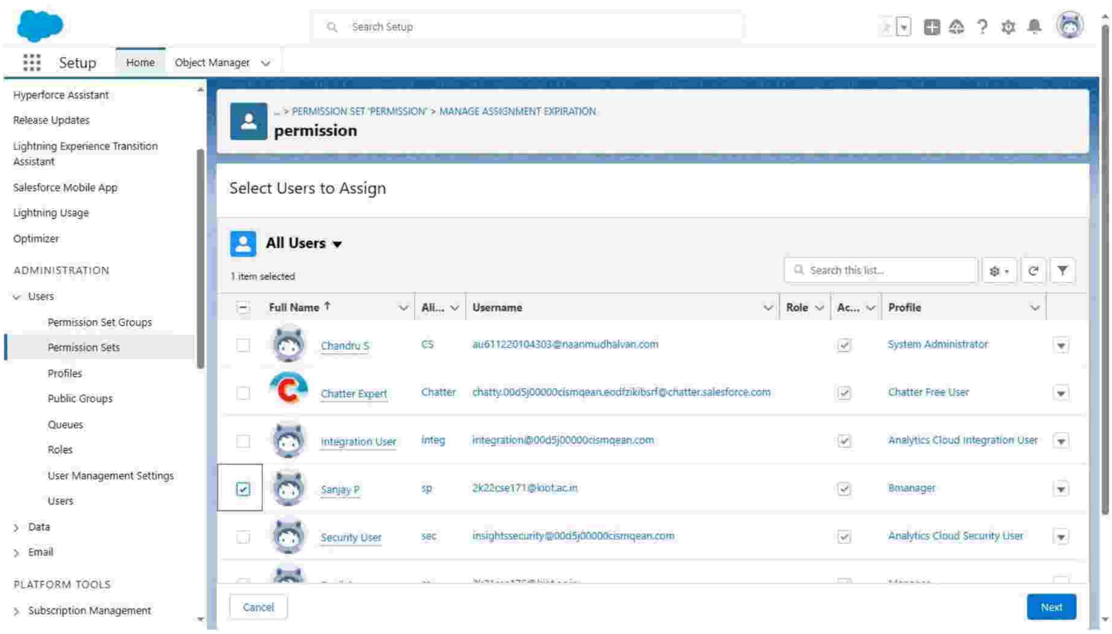
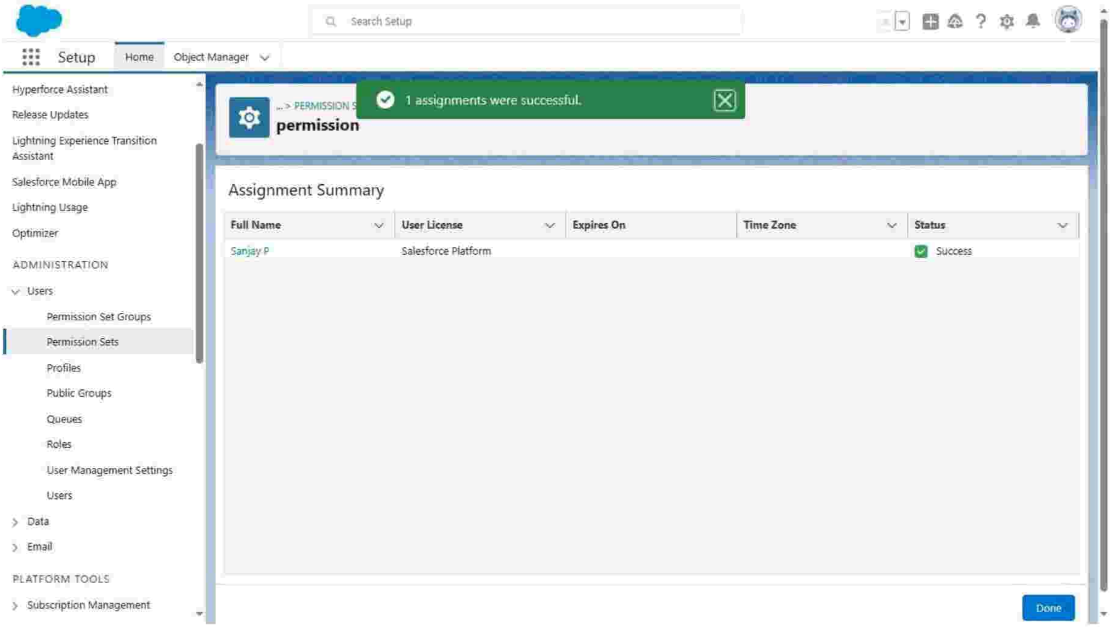






3.SUPPOSE THERE ARE 2 USERS AND THEY ARE HAVING CREATE, READ, EDIT ACCESS ON ACCOUNT OBJECT WITH THE SAME PROFILE BUT WE WANT TO OPEN UP THE ACCESS FOR ONE USER TO DELETE HOW WILL YOU IMPLEMENT THE SECURITY SETTING.

STEP 1: CREATE A PERMISSION SET FOR DELETE ACCESS

1. GO TO "SETUP" IN SALESFORCE.

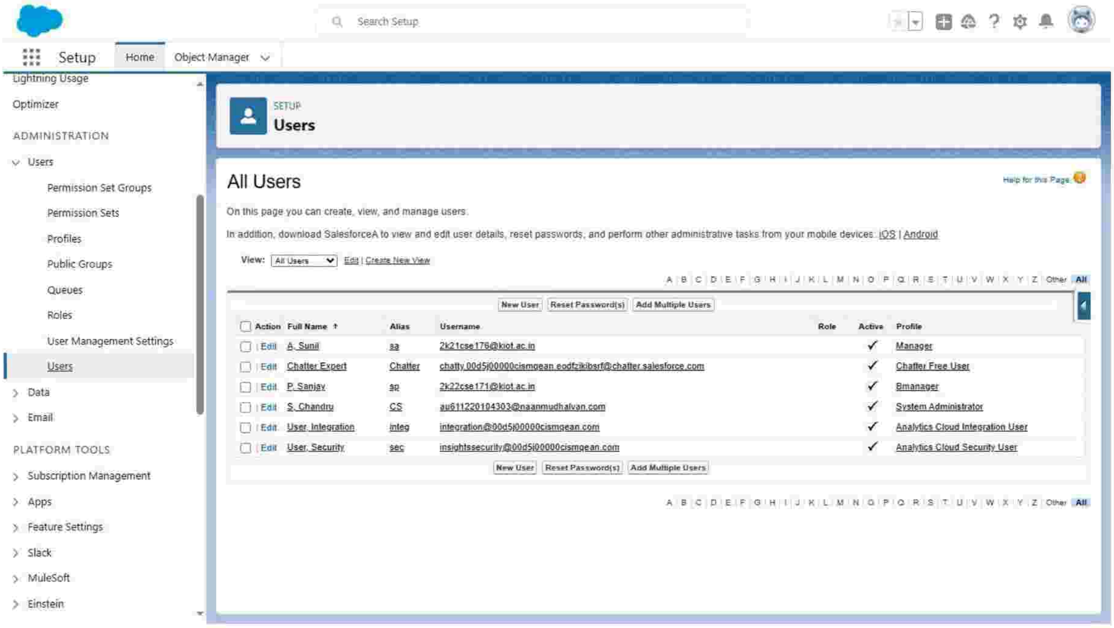
2. IN THE QUICK FIND BOX, TYPE "PERMISSION SETS" AND SELECT IT.

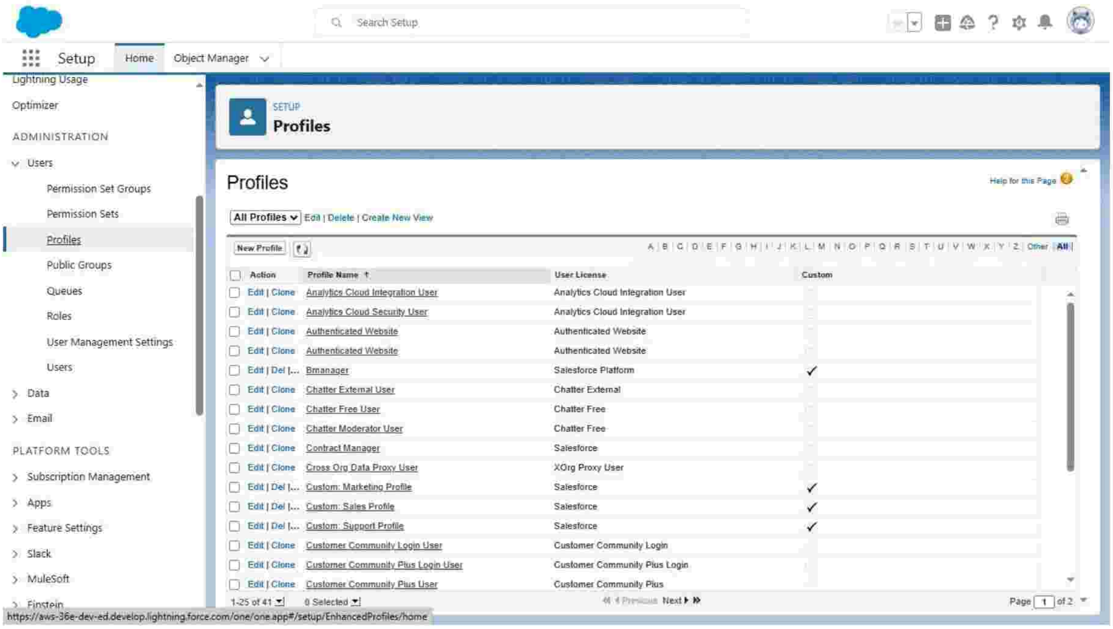
3. CLICK "NEW PERMISSION SET" TO CREATE A NEW ONE.

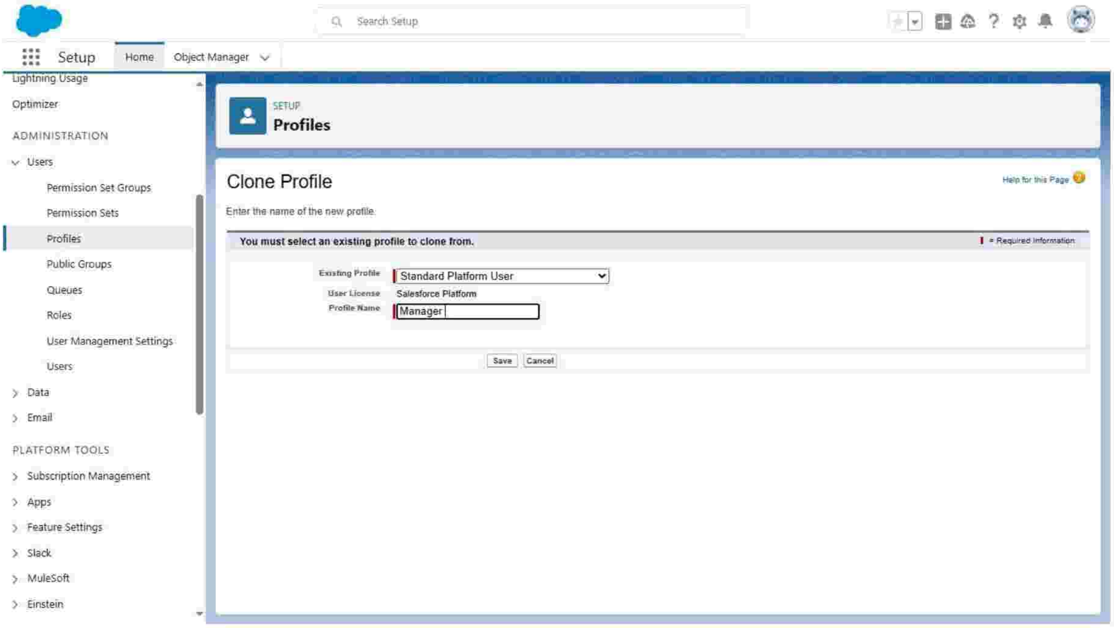
4. GIVE THE PERMISSION SET A NAME (E.G., "DELETE ACCESS PERMISSION SET").

5. IN THE "SYSTEM PERMISSIONS" SECTION, FIND AND ENABLE THE "DELETE" PERMISSION FOR THE "ACCOUNT" OBJECT.

6. Save the permission set.



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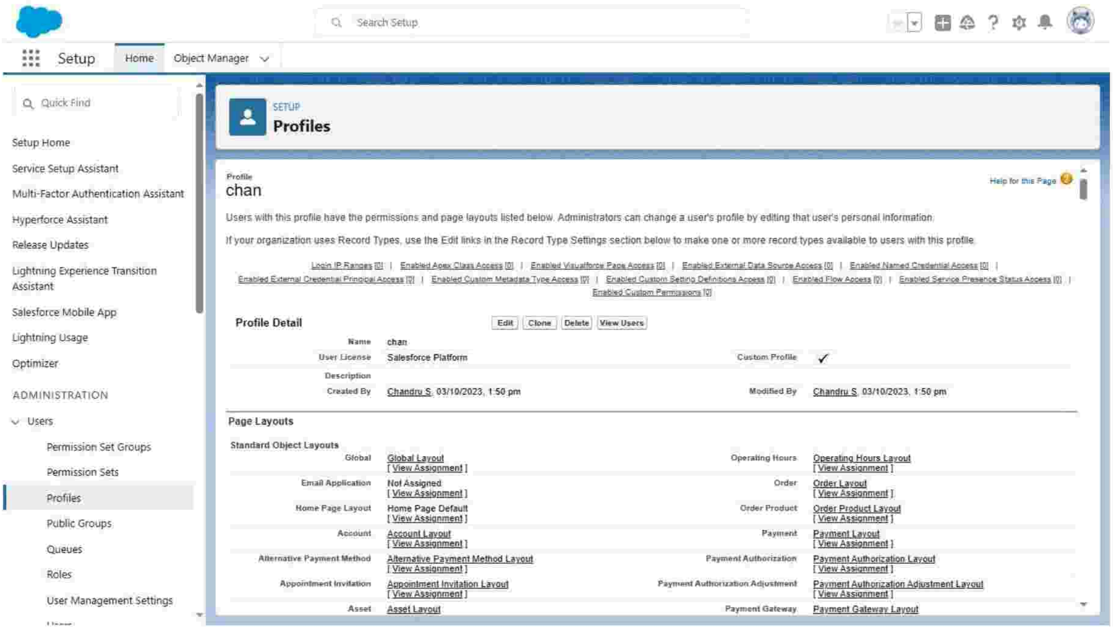
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SETUP
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chan
Help for this Page
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Profile Detail
Edit
Clone
Delete
View Users
Name
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User License
Salesforce Platform
Custom Profile
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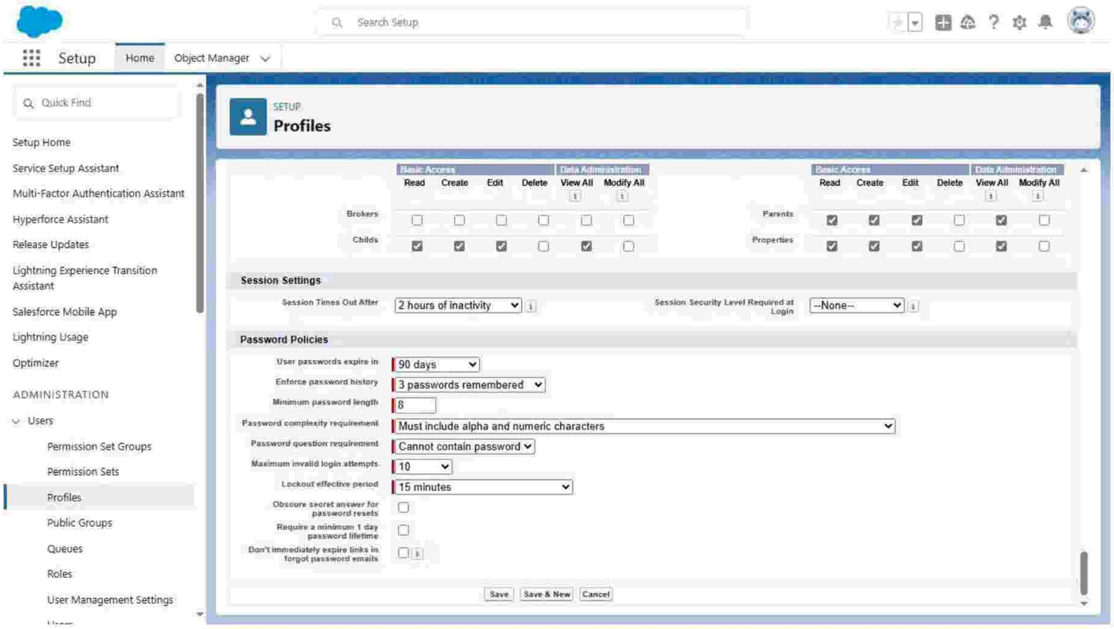
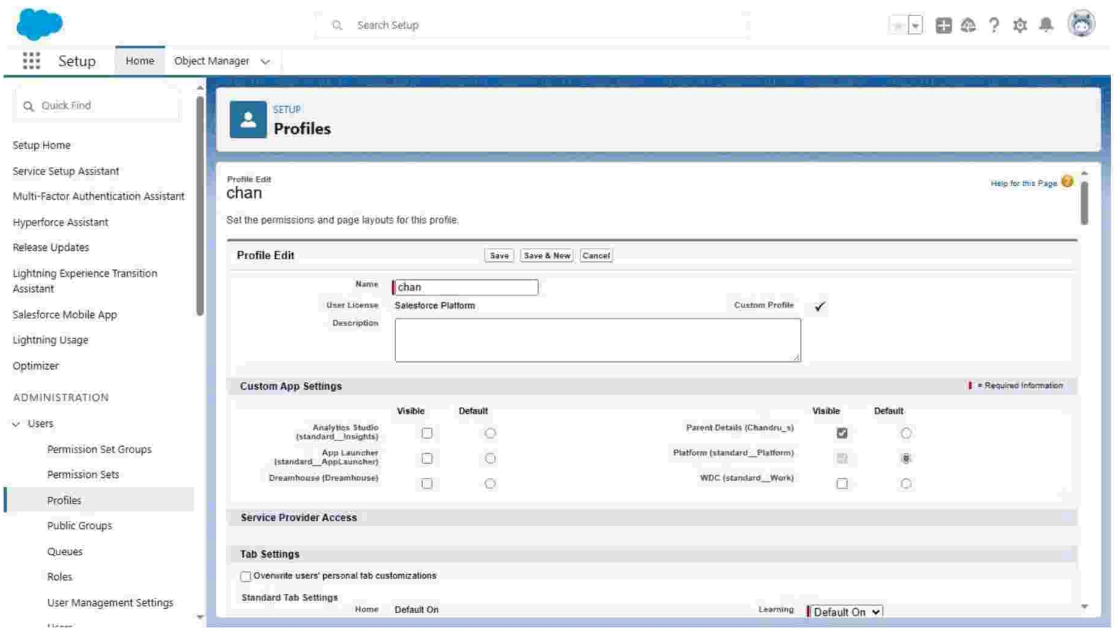
Created By
Chandru S, 03/10/2023, 1:50 pm
Modified By
Chandru S, 03/10/2023, 1:50 pm
Page Layouts
Standard Object Layouts
Global
Global Layout
[View Assignment]
Operating Hours
Operating Hours Layout
Email Application
Not Assigned
Order
Order Layout
Home Page Layout
Home Page Default
Order Product
Order Product Layout
Account
Account Layout
Payment
Payment Layout
Alternative Payment Method
Alternative Payment Method Layout
Payment Authorization
Payment Authorization Layout
Appointment Invitation
Appointment Invitation Layout
Payment Authorization Adjustment
Payment Authorization Adjustment Layout
Asset
Asset Layout
Payment Gateway
Payment Gateway Layout


Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce 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
SETUP
Profiles
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Brokers
Childs
Parents
Properties
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
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails
Save
Save & New
Cancel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Permission Sets
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Public Groups
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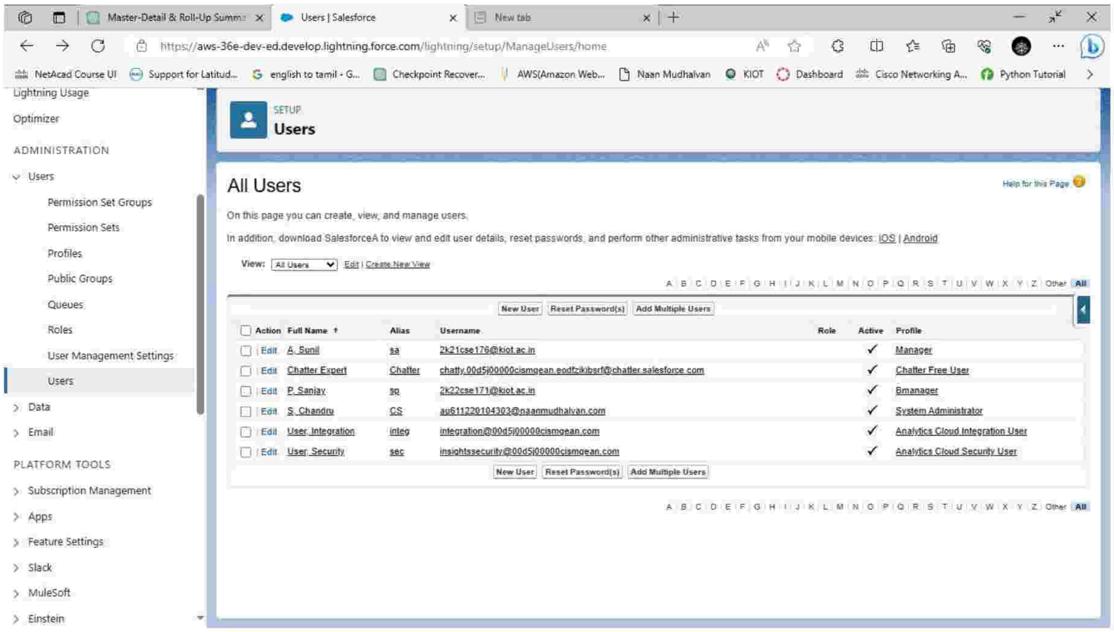
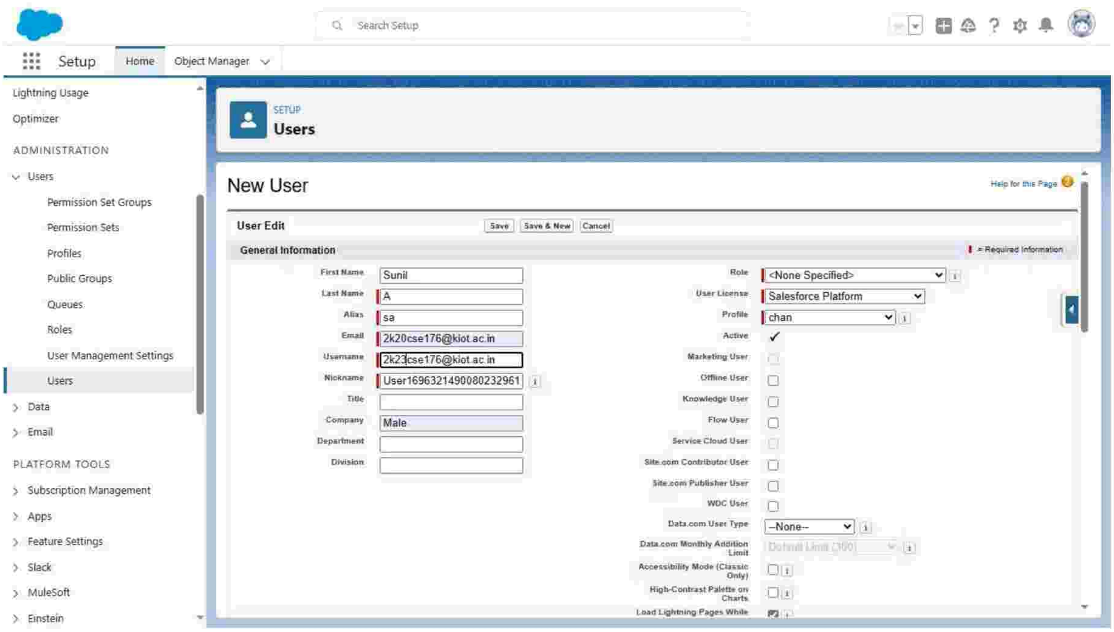
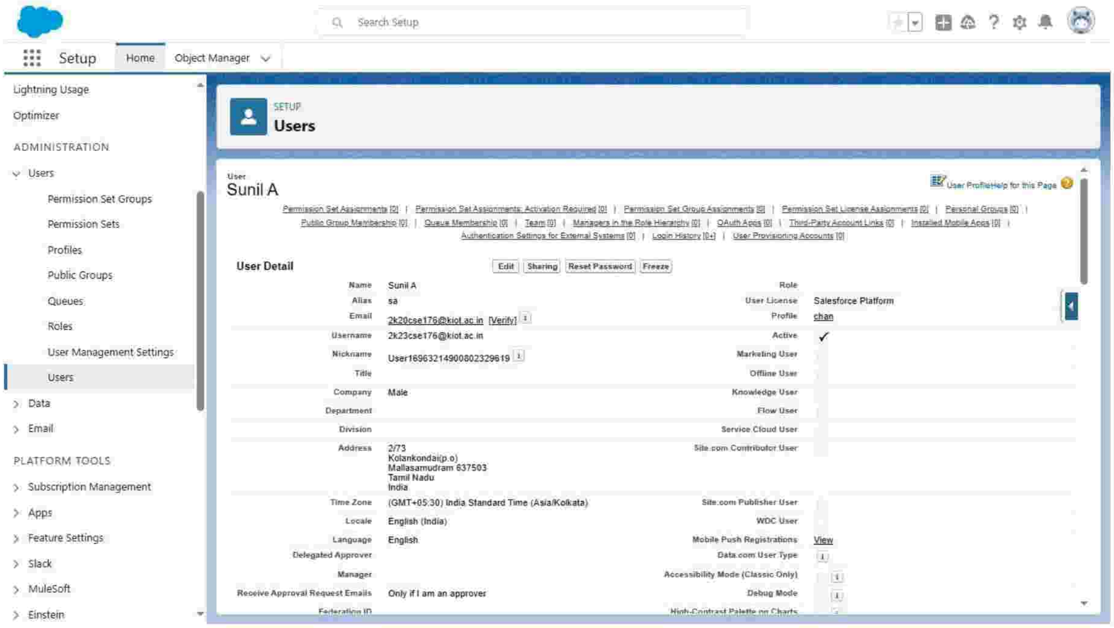
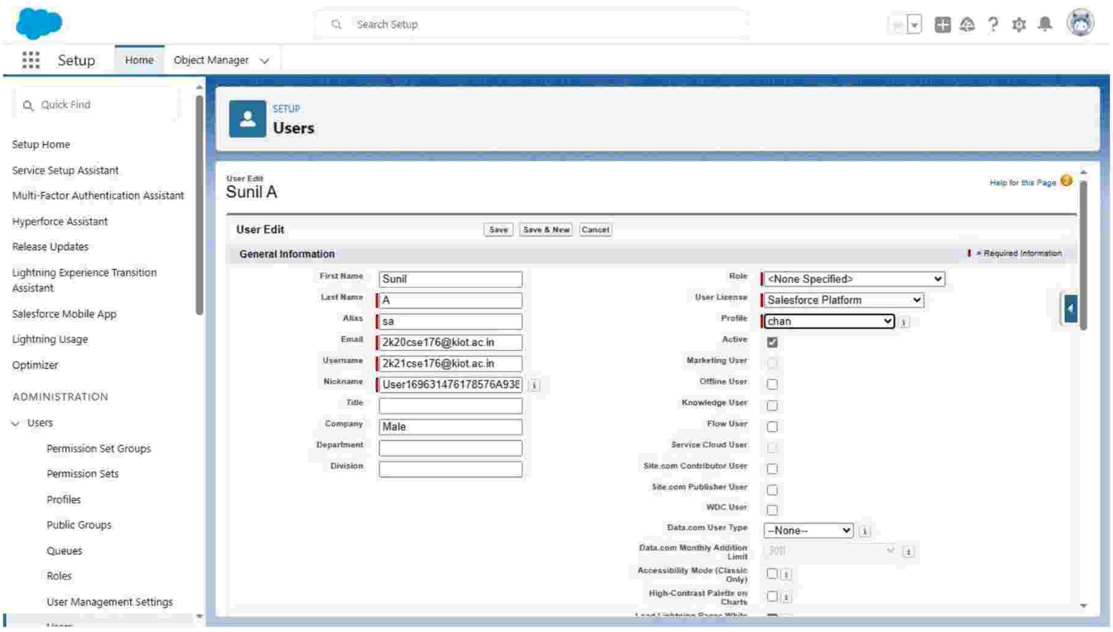
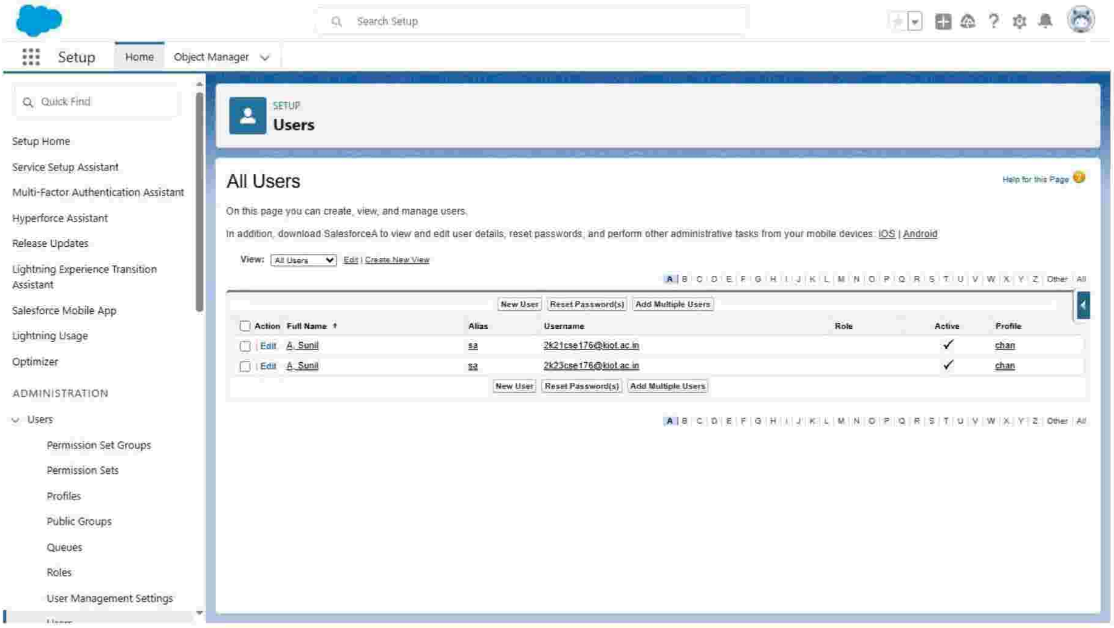
Roles
User Management Settings
SETUP
Profiles
Profile Edit
chan
Help for this Page
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
chan
User License
Salesforce Platform
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Dreamhouse (Dreamhouse)
Parent Details (Chandru_s)
Platform (standard__Platform)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Standard Tab Settings
Home
Default On
Learning
Default On


Master-Detail & Roll-Up Summa
Users | Salesforce
New tab
https://aws-36e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
SETUP
Users
All Users
On this page you can create, view, and manage users.
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile
A, Sunil
sa
2k21cse176@kiot.ac.in
Manager
Chatter Expert
Chatter
Chatter Free User
P, Sanjay
sp
2k22cse171@kiot.ac.in
Bmanager
S, Chandru
CS
System Administrator
User, Integration
integ
Analytics Cloud Integration User
User, Security
sec
Analytics Cloud Security User
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings


Search Setup
Setup
Home
Object Manager
SETUP
Users
New User
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Sunil
Last Name
A
Alias
sa
Email
2k20cse176@kiot.ac.in
Username
2k23cse176@kiot.ac.in
Nickname
User1696321490080232961
Title
Company
Male
Department
Division
Role
<None Specified>
User License
Salesforce Platform
Profile
chan
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--





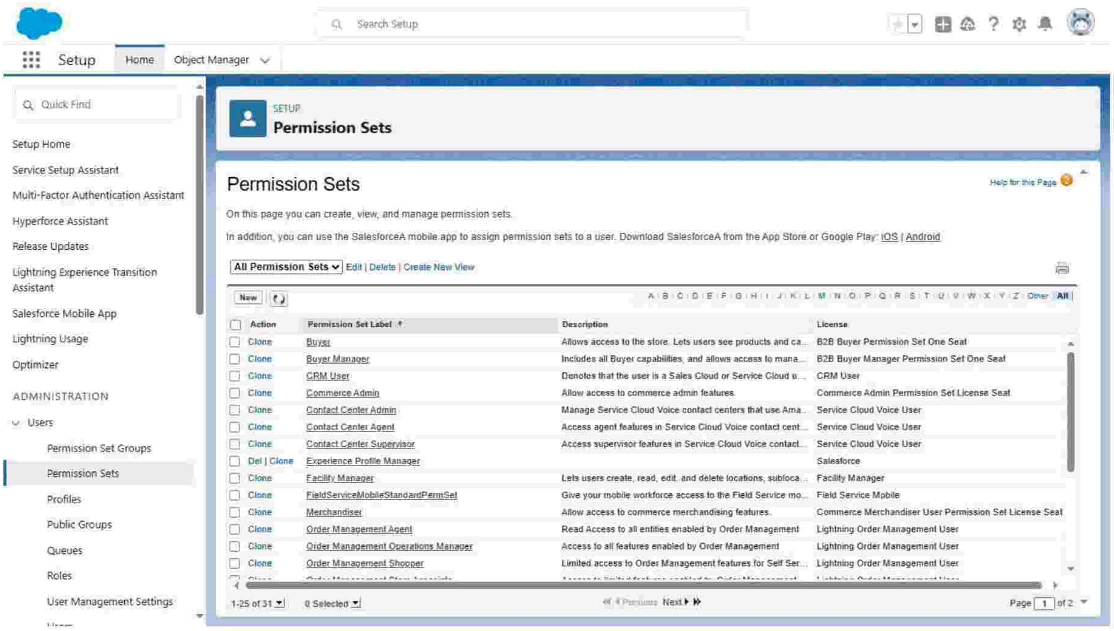


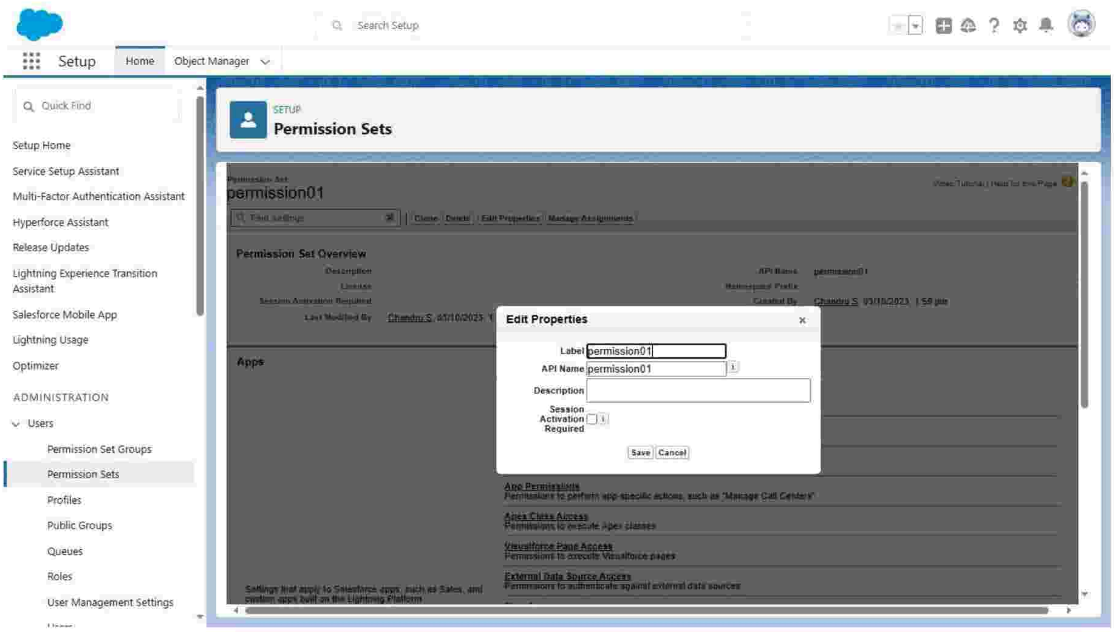
STEP 2: ASSIGN THE PERMISSION SET TO THE USER NEEDING DELETE ACCESS

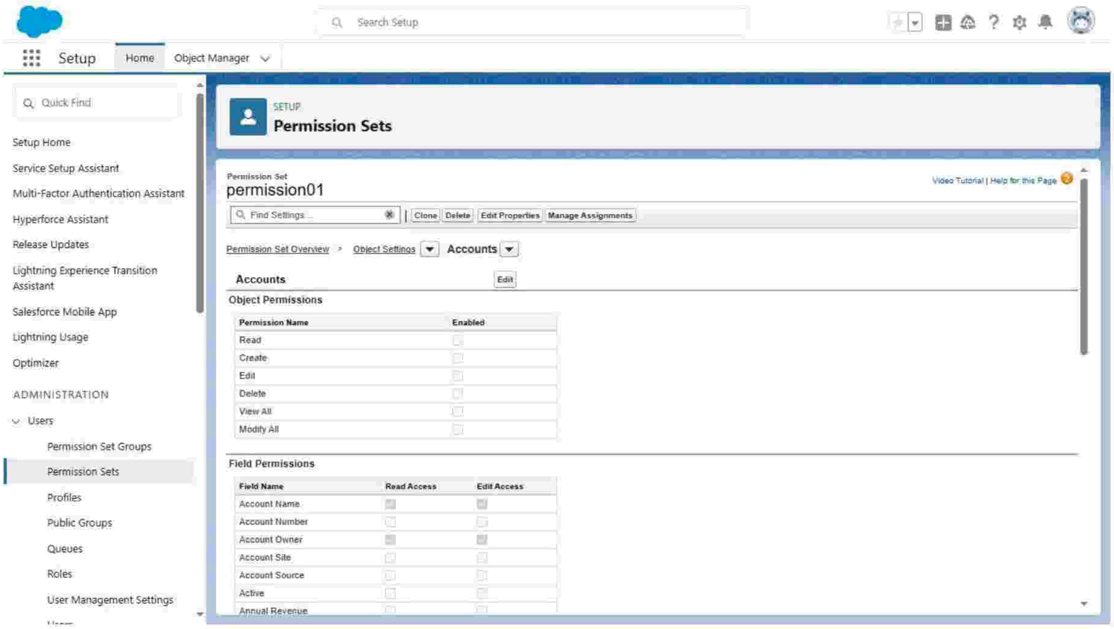
1. IN THE "PERMISSION SET DETAIL" PAGE, CLICK ON "MANAGE ASSIGNMENTS."

2. CLICK "ADD ASSIGNMENTS" AND SELECT THE USER WHO NEEDS DELETE ACCESS.

3. SAVE THE ASSIGNMENT.



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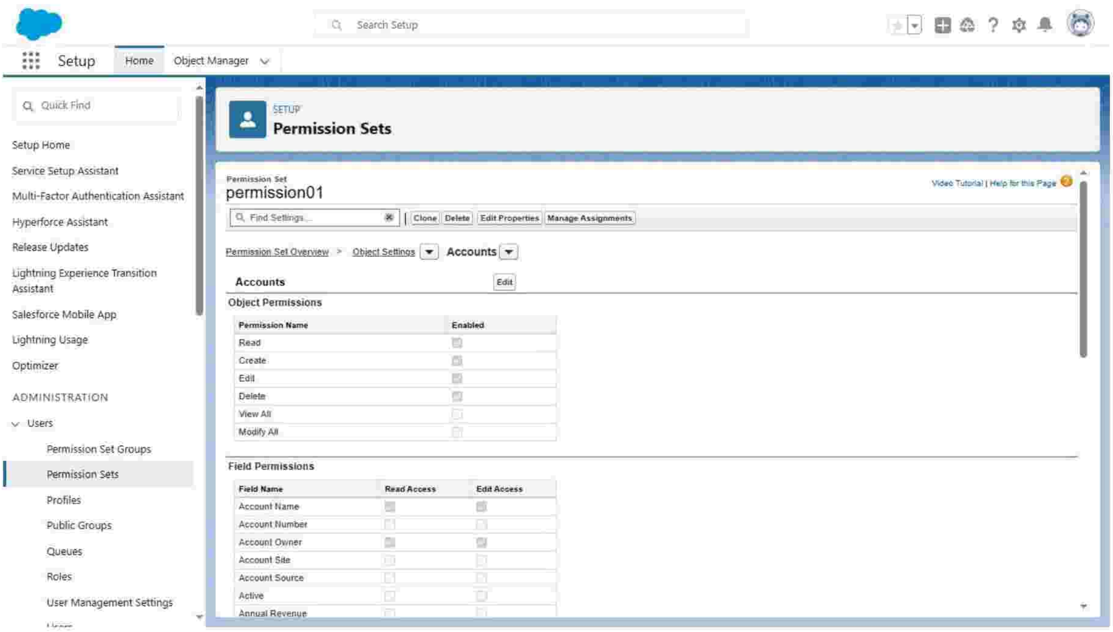
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
SETUP
Permission Sets
Permission Set
permission01
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Object Settings
Accounts
Accounts
Edit
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
Modify All
Field Permissions
Field Name
Read Access
Edit Access
Account Name
Account Number
Account Owner
Account Site
Account Source
Active
Annual Revenue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Profiles
Public Groups
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User Management Settings
SETUP
Permission Sets
Permission Set
permission01
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Object Settings
Accounts
Accounts
Edit
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete
View All
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Field Permissions
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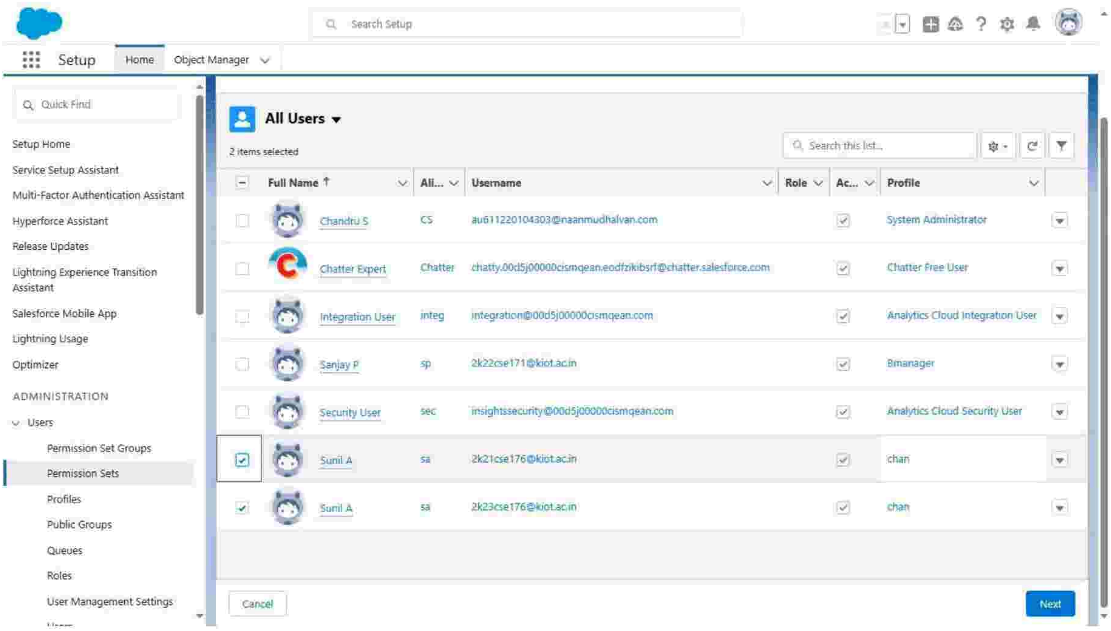
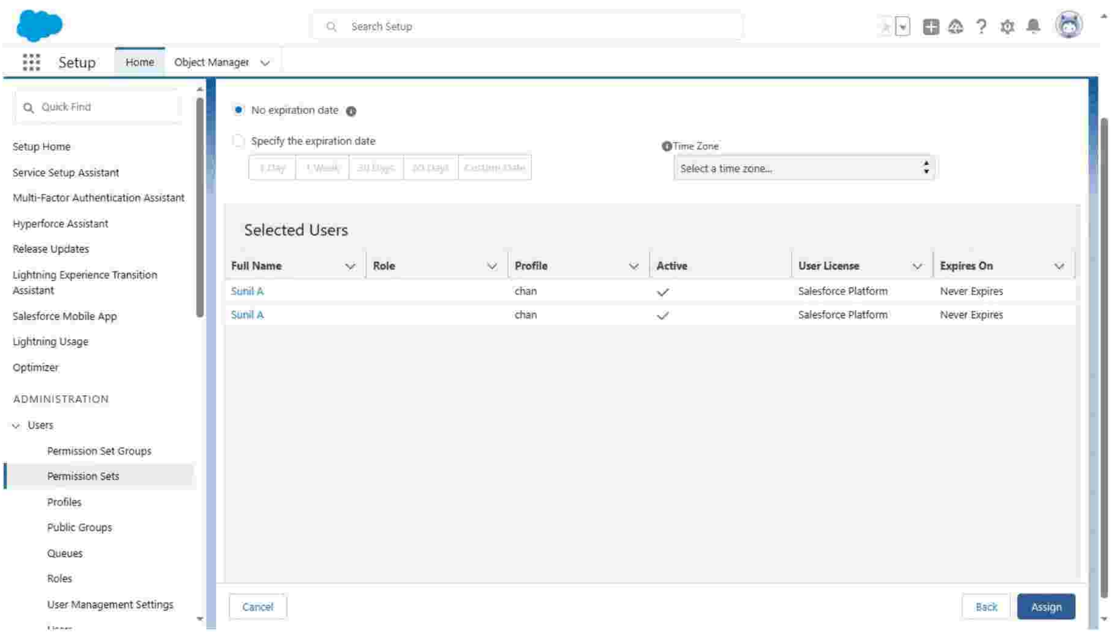
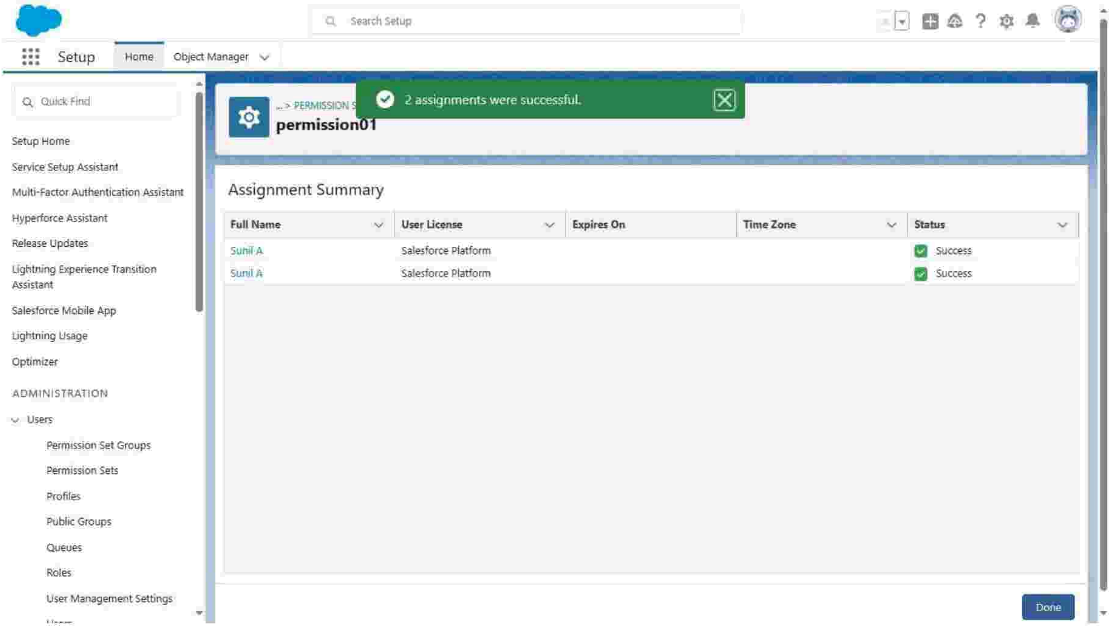
Read Access
Edit Access
Account Name
Account Number
Account Owner
Account Site
Account Source
Active
Annual Revenue







4.CREATE A SCREEN FLOW FOR A BASIC SURVEY TO FILL IN THE DETAILS FOR ANY FORM.

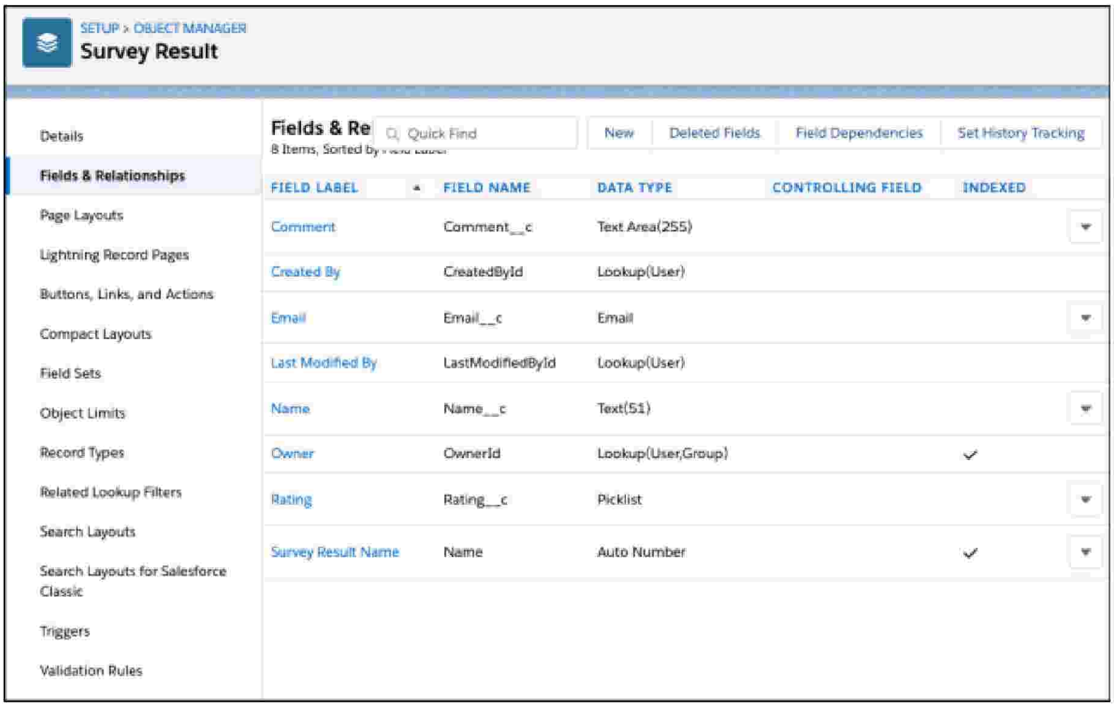
STEP 1: CREATE A CUSTOM OBJECT

1.CLICK SETUP.

2.IN THE OBJECT MANAGER, CLICK CREATE | CUSTOM OBJECT.

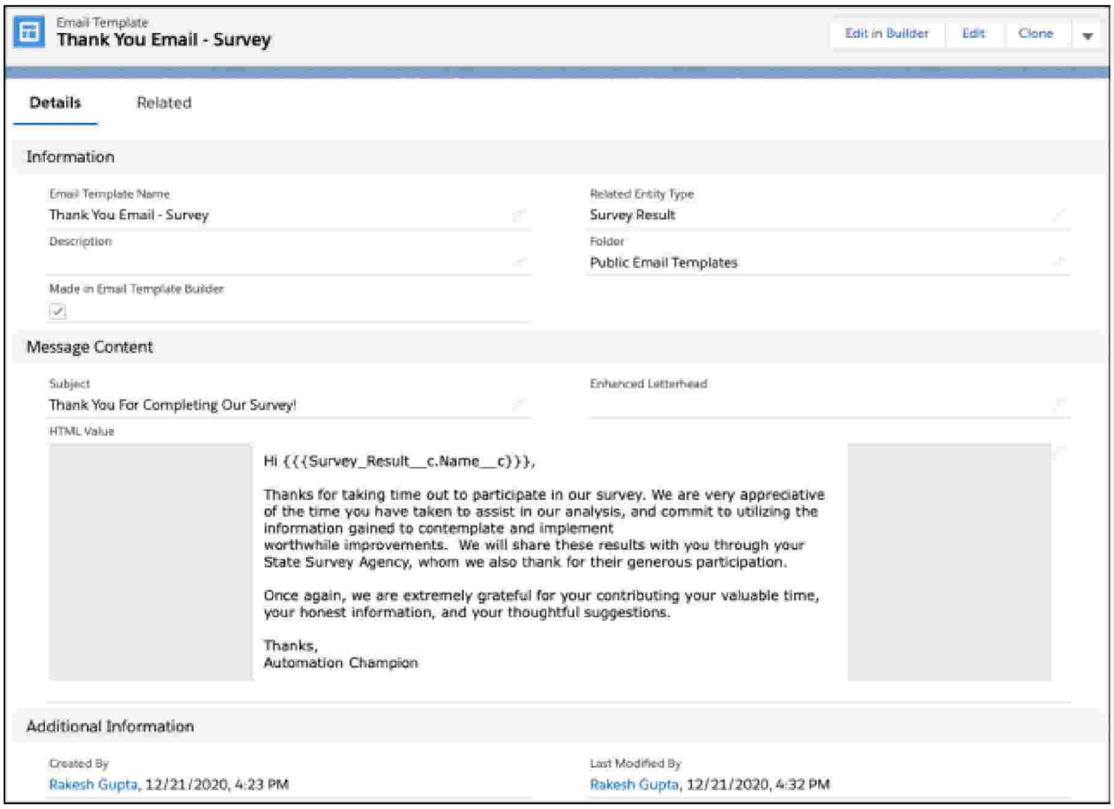
3.NOW CREATE A CUSTOM OBJECT SURVEY RESULT AND FIELDS AS SHOWN IN THE SCREENSHOT BELOW:

4. CLICK SAVE.



STEP 2: CREATE A THANK YOU FOR SURVEY LIGHTNING EMAIL TEMPLATE

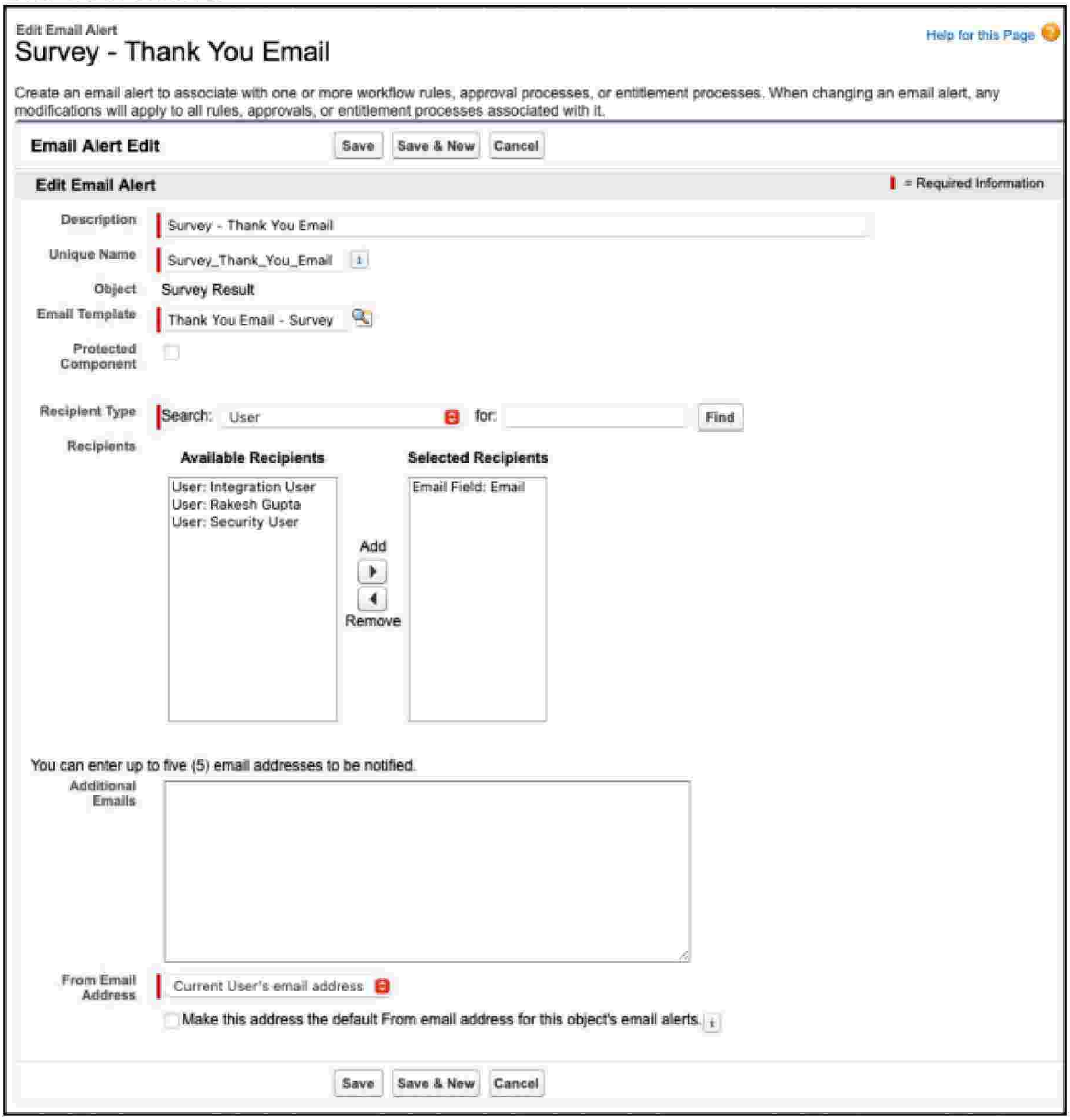
1.CLICK APP LAUNCHER.
2.IN THE QUICK FIND BOX, TYPE EMAIL TEMPLATES.
3.CLICKS ON THE NEW EMAIL TEMPLATE BUTTON.
4.NAME THE LIGHTNING EMAIL TEMPLATE AND MAKE SURE TO STORE IT IN THE PUBLIC EMAIL TEMPLATES FOLDER.
5.CREATE A TEMPLATE LIKE THE FOLLOWING SCREENSHOT



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.



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

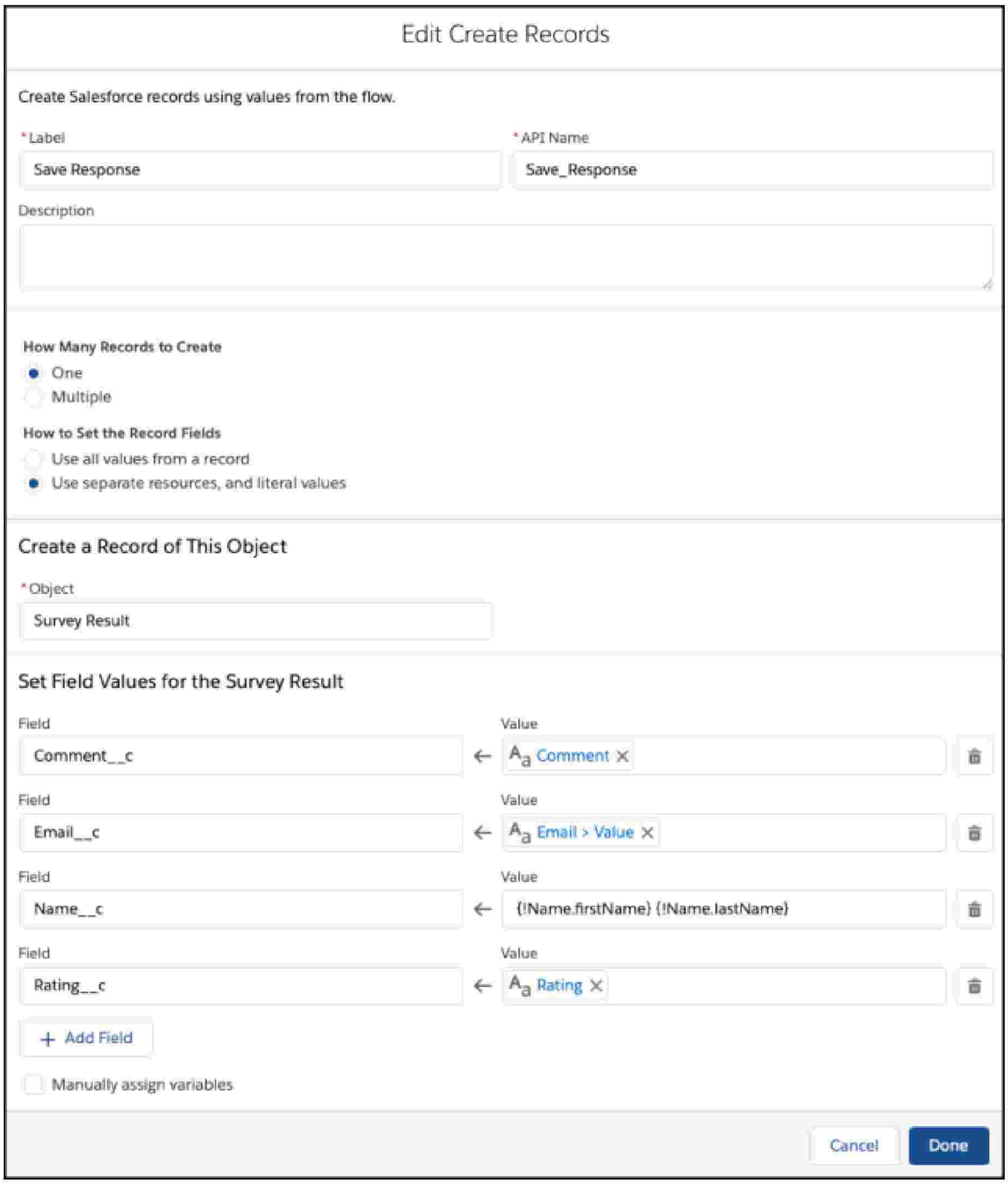
ROW 1:
FIELD: COMMENT__C
VALUE: {!COMMENT}
CLICK ADD ROW

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}

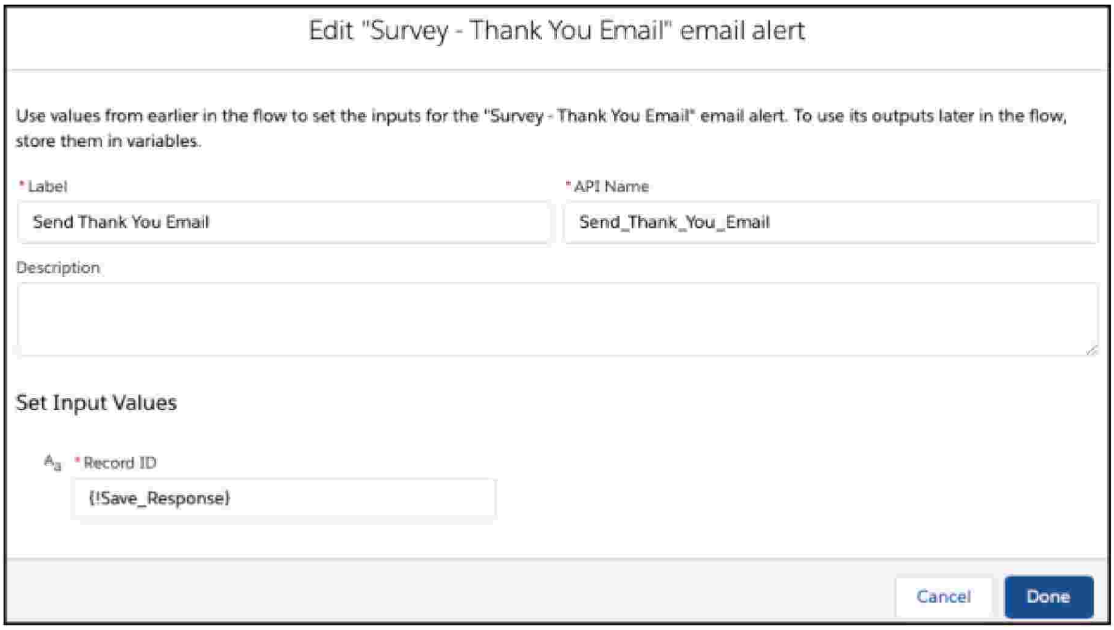
7.CLICK DONE.

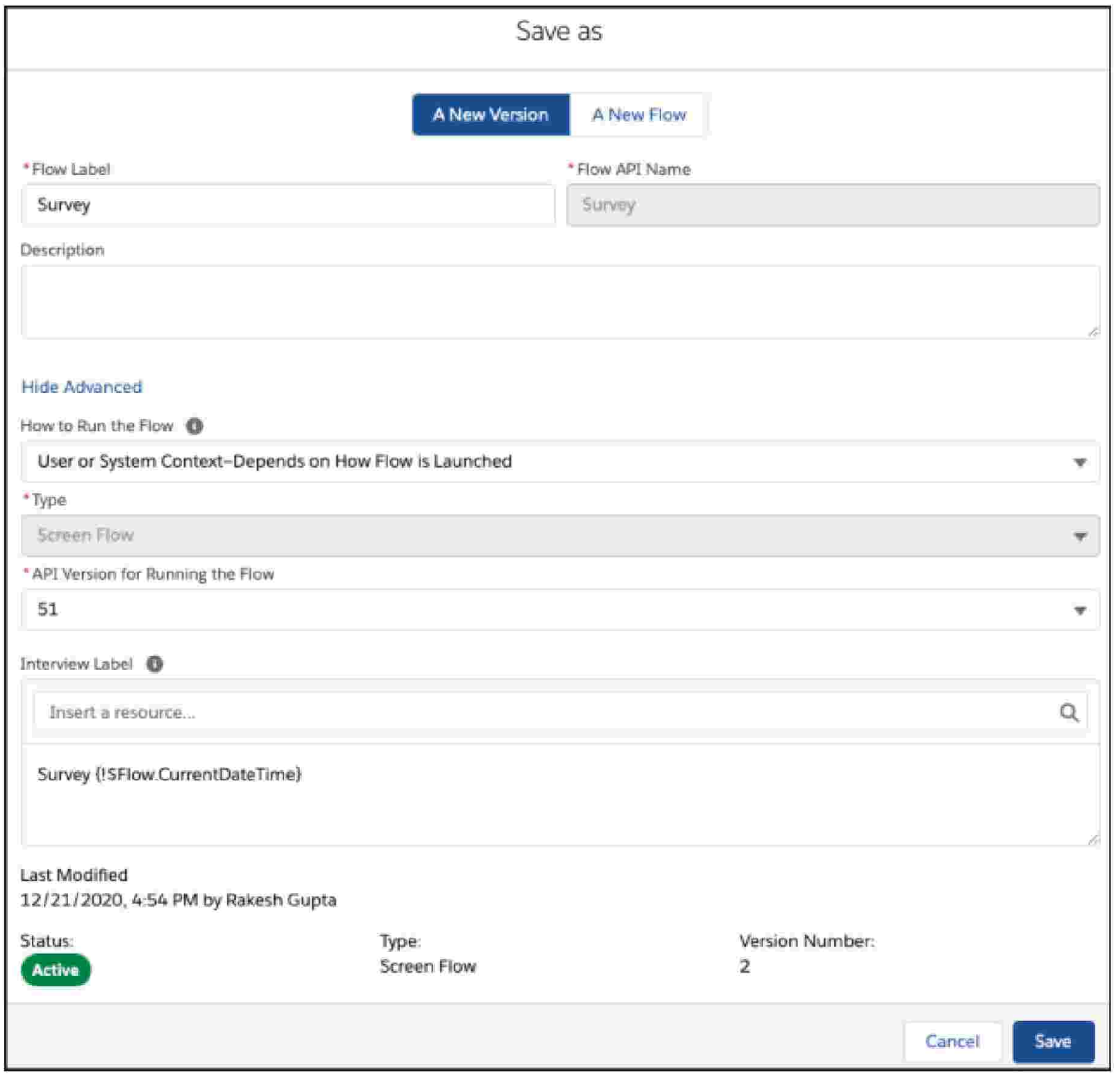


STEP 4.3: SALESFORCE FLOW – CALL AN ACTON – EMAIL ALERT TO SEND OUT THANK YOU EMAIL

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.

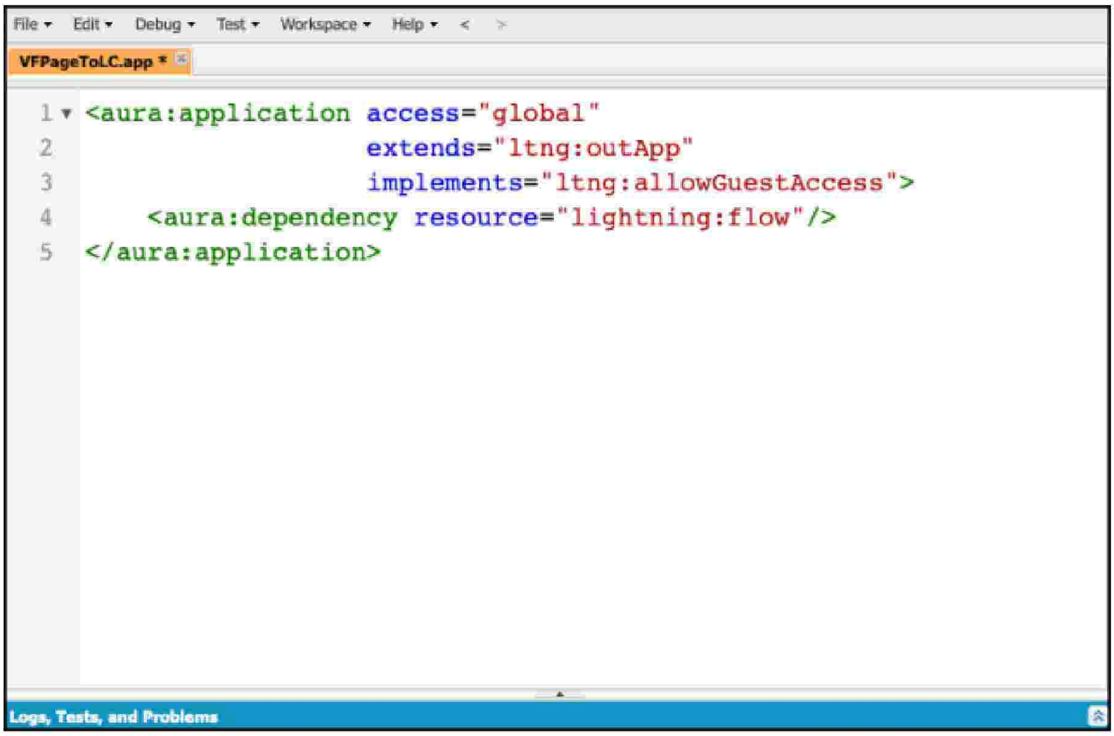
4.Clicks on the Survey – Thank You Email email alert.
5.Click Done.





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.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VFPageToLC.app *
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implements="ltng:allowGuestAccess">
<aura:dependency resource="lightning:flow"/>
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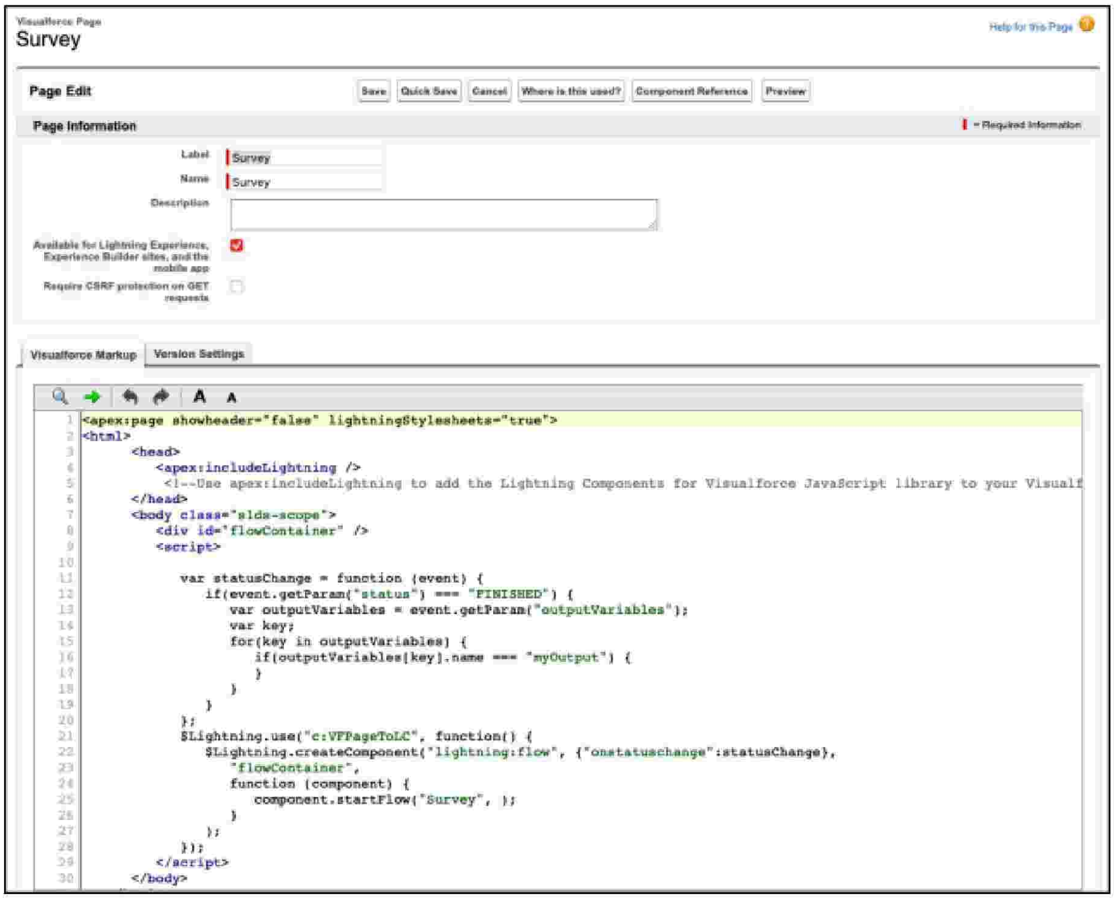
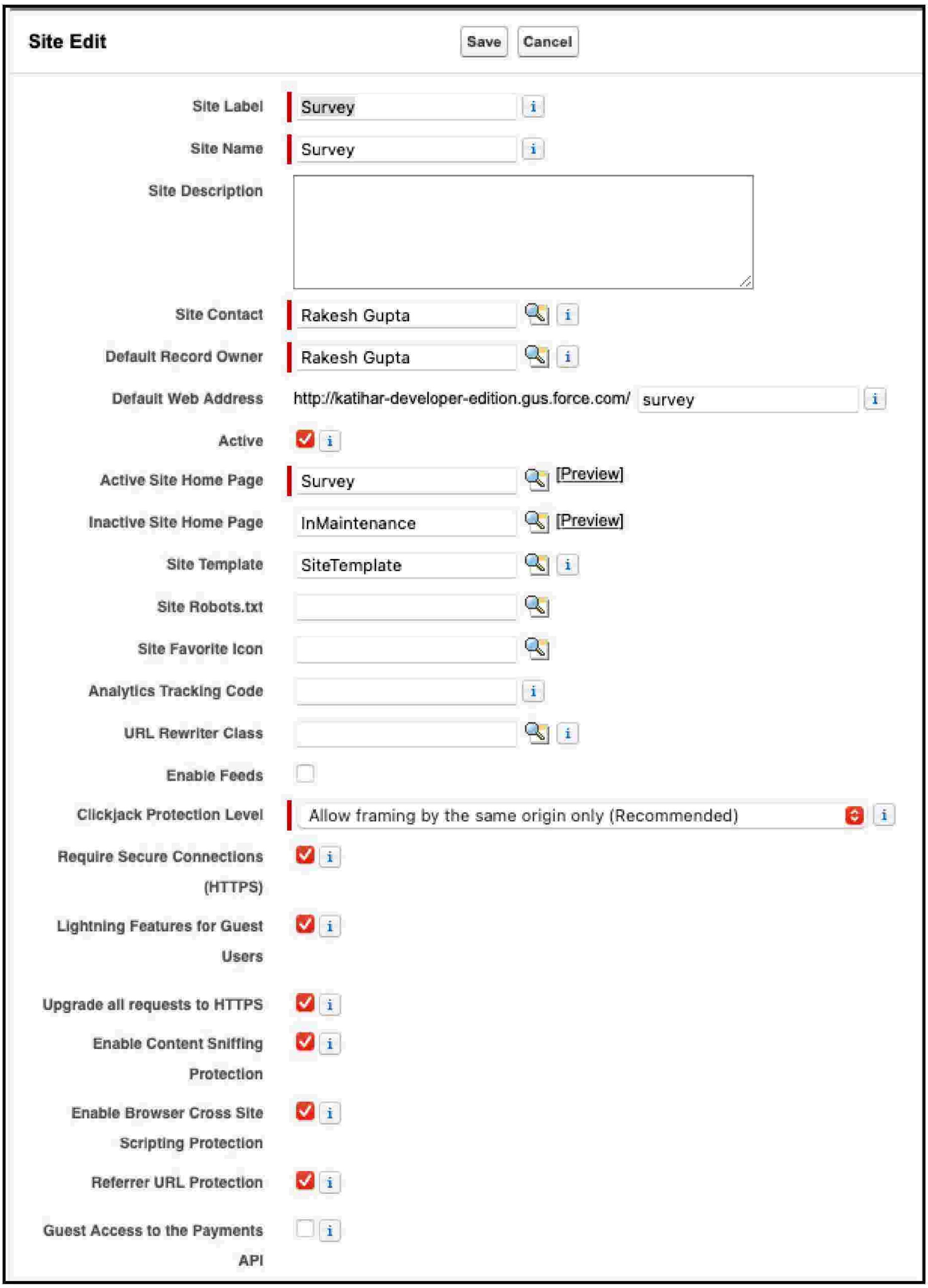
Logs, Tests, and Problems



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.



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:

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.