

NAAN MUDHALVAN
Salesforce Developer(Course)
Assignment no 1

Name : Navaneetha S

Naan Mudhalvan id : au611420104048

Year & Dep : IV year & CSE

Batch : 2024

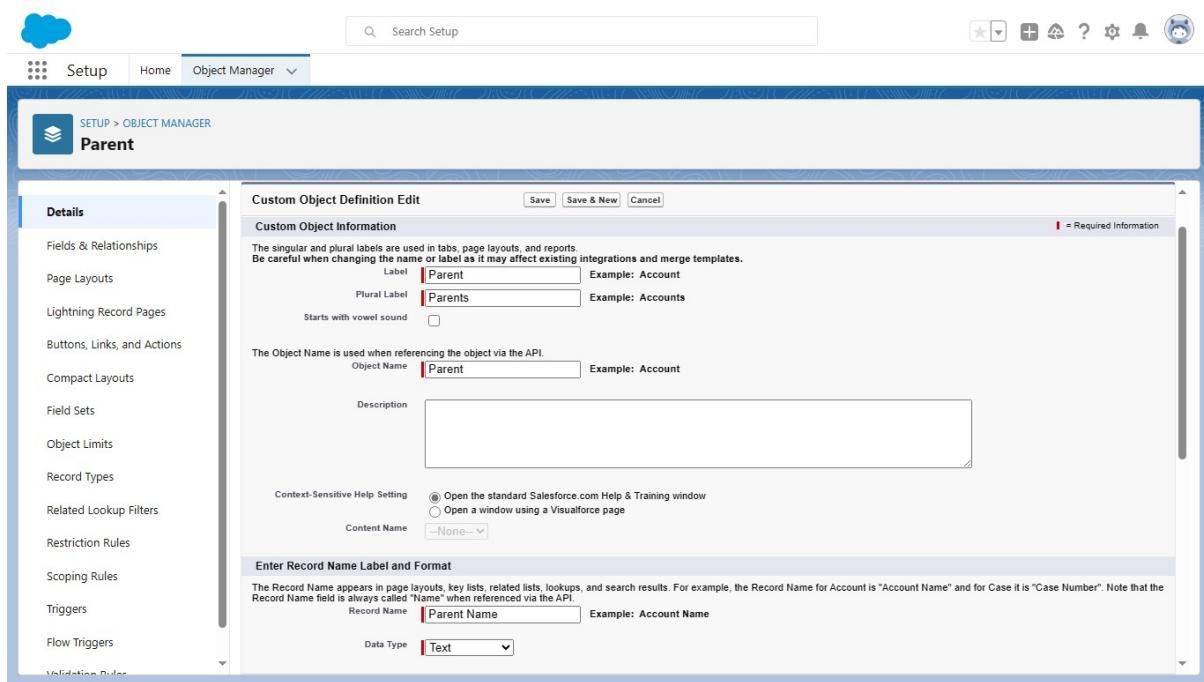
Zone no : Zone 8



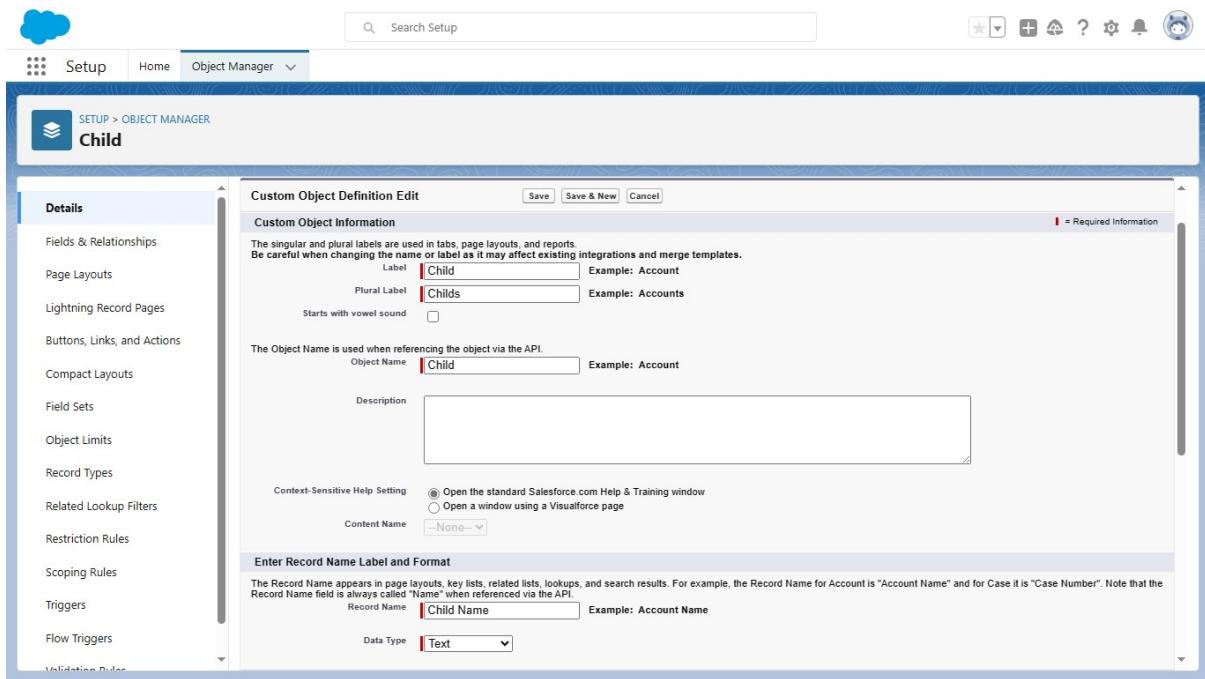
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1. Creating a Master-Detail Relationship between two custom objects and setting up a Roll-Up Summary Field to calculate the total number of records in the child object is a common task in Salesforce. Below are the steps to achieve this:

Step 1: Create Custom Objects.



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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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SETUP > OBJECT MANAGER
Parent

Fields & Relationships
4 Items, Sorted by Field Label

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

SETUP > OBJECT MANAGER
Parent

New Custom Field

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.
- 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.
- 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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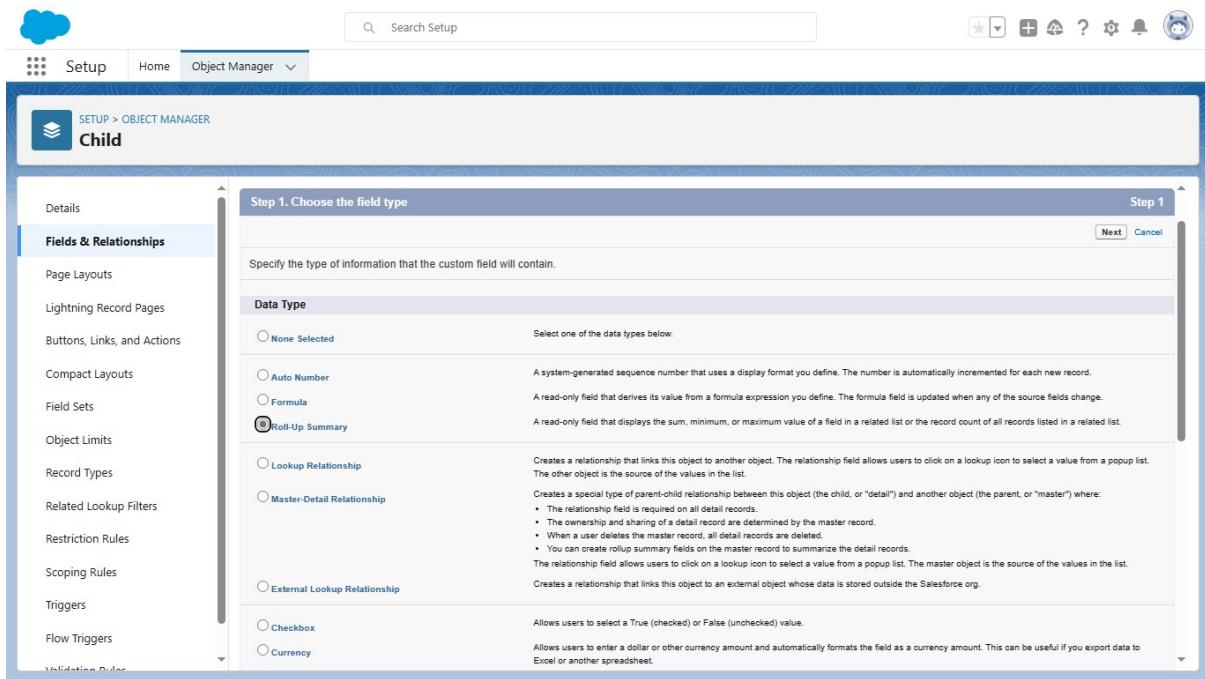
The screenshot shows the Salesforce Setup interface for creating a new relationship. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' under 'Parent'. On the left, a sidebar lists various setup options like 'Fields & Relationships', 'Page Layouts', and 'Buttons, Links, and Actions'. The central panel is titled 'New Relationship' and 'Step 2. Choose the related object'. It shows a dropdown menu set to 'Child'. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface for the 'Child' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' under 'Child'. On the left, a sidebar lists various setup options like 'Fields & Relationships', 'Page Layouts', and 'Buttons, Links, and Actions'. The central panel is titled 'Fields & Relationships' and displays a table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

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)		



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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.



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The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a 'User Interface' section with 'Tabs' highlighted. The main content area displays four sections: 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs'. Under 'Custom Object Tabs', there is a table with one row:

Action	Label	Tab Style	Description
Edit Del	Brokers	People	

Under 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs', there are messages indicating 'No [tab type] tabs have been defined'.

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.



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Lightning Experience App Manager

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified ...	Type	Status
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	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, opportun...	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 Parent Details	Image <input type="button" value="Upload"/>
*Developer Name Chandru s	Primary Color Hex Value #0070D2
Description Enter a description...	Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

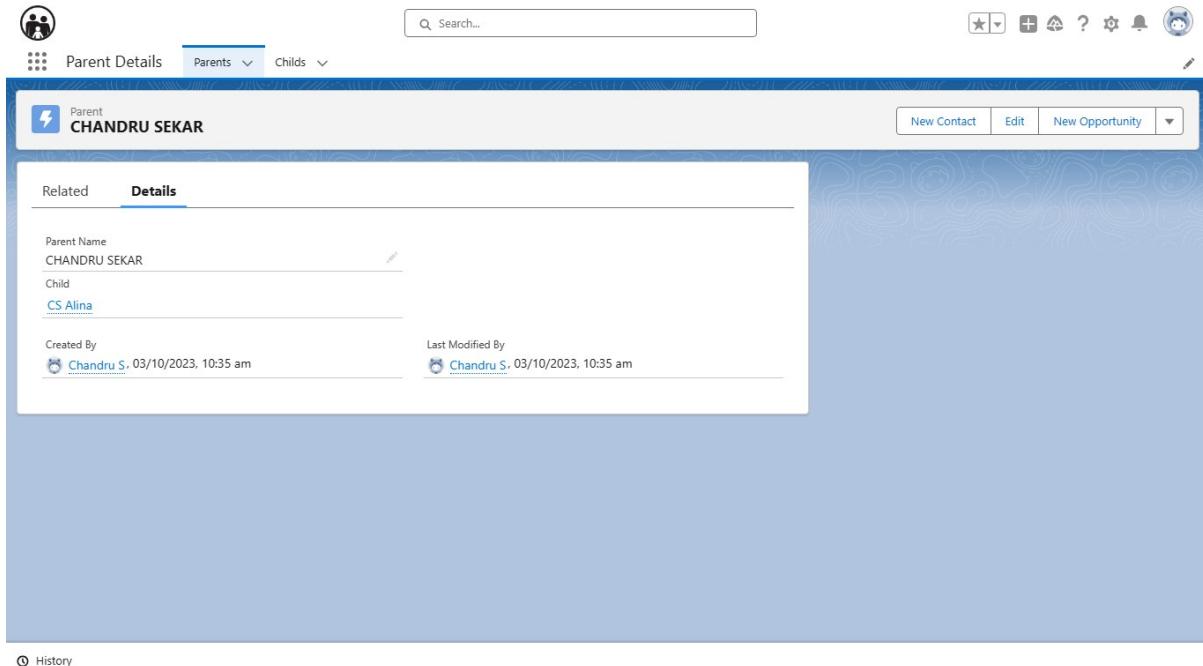
Step 5: Test the Relationship and Roll-Up Summary Field

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



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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.



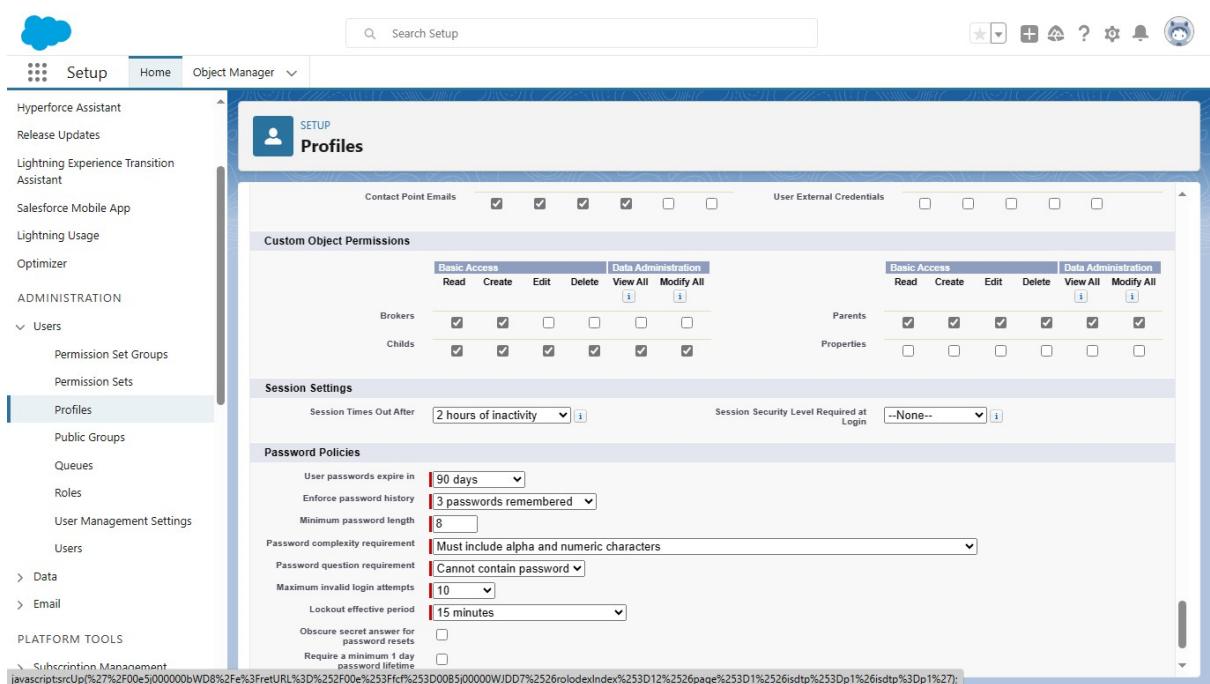
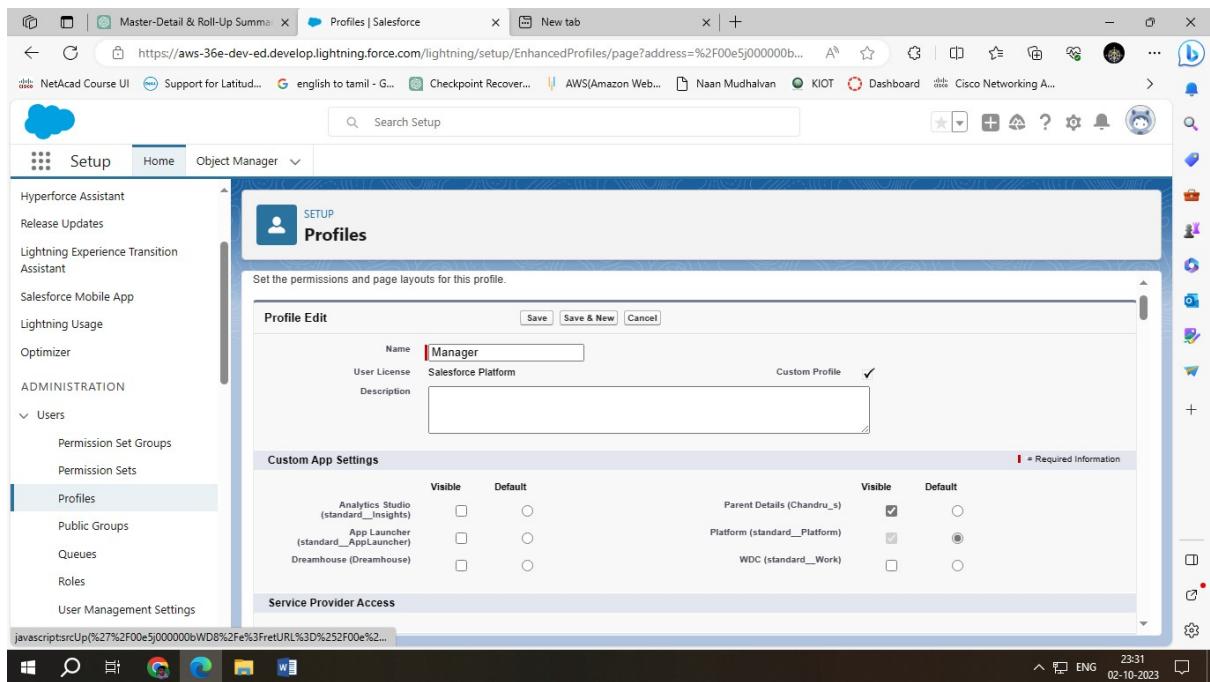
2. If there are 2 users, User A and User B in the organization and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

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.



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Step 2: Create Criteria-Based Sharing Rules

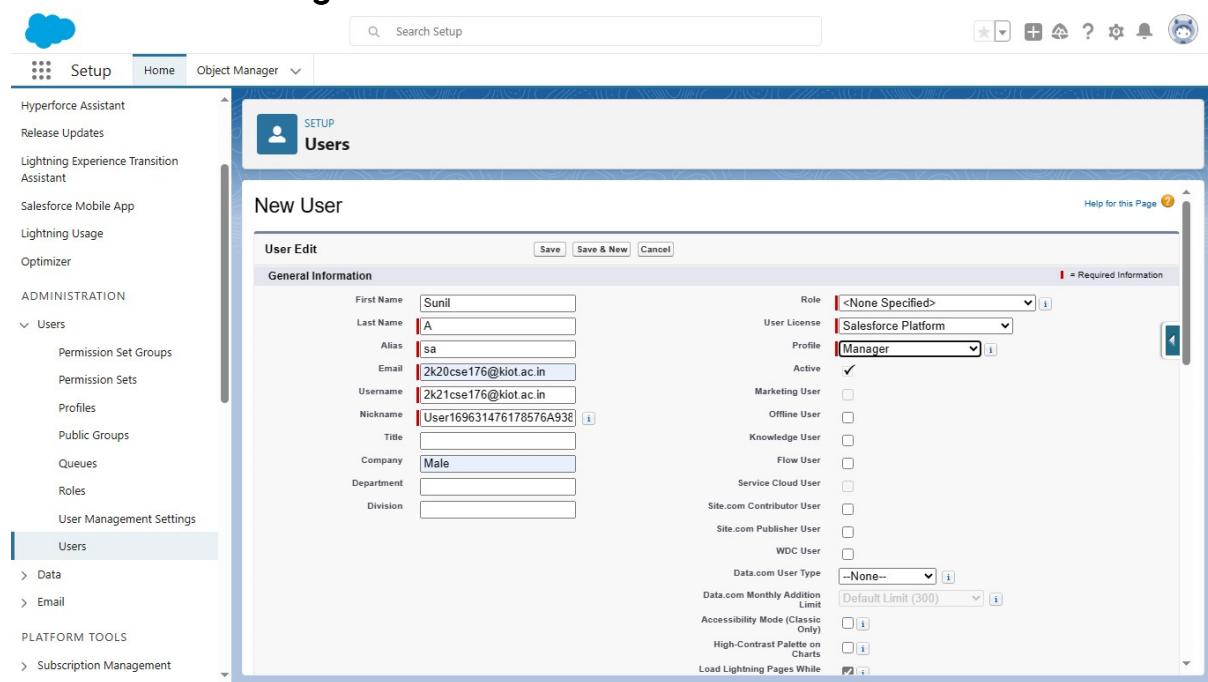
For User A:1. Go to "Setup" in Salesforce.

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



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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.



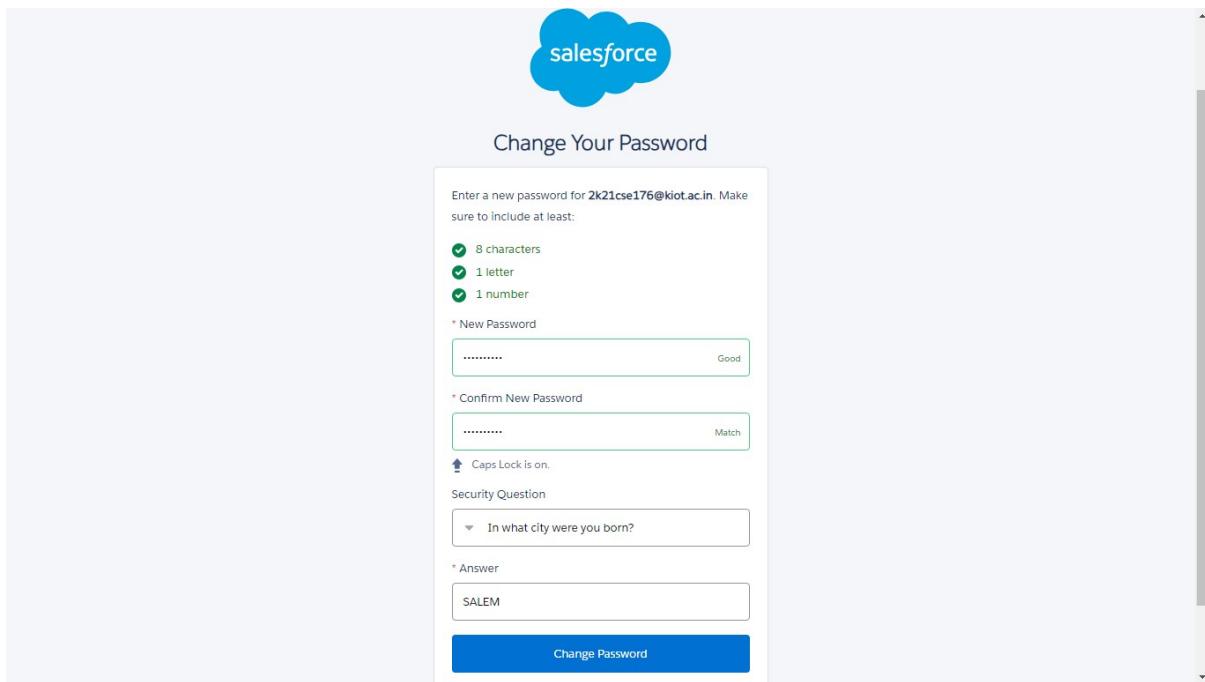
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The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with various links like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, and several Administration sections. The main area is titled 'SETUP' and 'Users'. It shows a user detail page for 'Sunil A'. The user's name is Sunil A, alias sa, email 2k20cse176@kiot.ac.in (verified), and username 2k21cse176@kiot.ac.in. The role is Manager, and the profile is Salesforce Platform Manager. Other details include address, department, division, time zone (GMT+05:30) India Standard Time (Asia/Kolkata), locale English (India), language English, and manager support. Buttons for Edit, Sharing, Reset Password, and Freeze are at the top right.

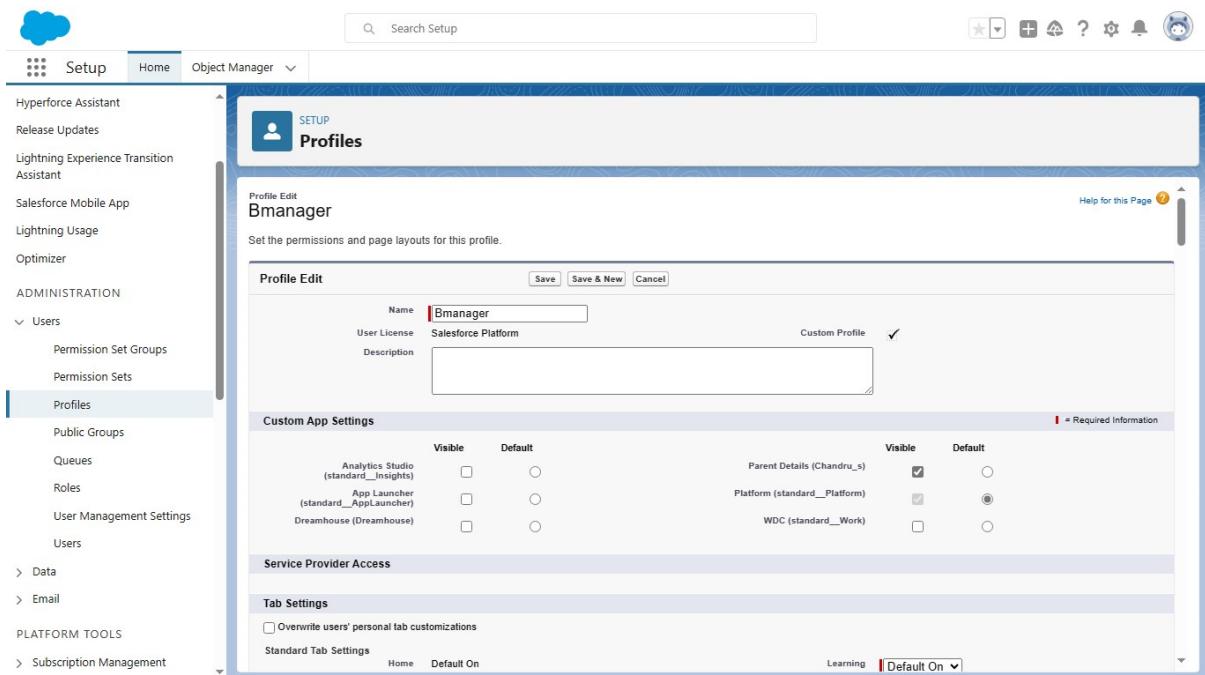
The screenshot shows the Gmail inbox. The sidebar includes Mail (99+), Chat, Spaces, Meet, and Labels. The inbox has 1,107 messages. An email from support@salesforce.com is selected, with the subject 'Welcome to Salesforce: Verify your account'. The email body contains a 'Verify Account' button, a URL (https://aws-36e-dev-ed.my.salesforce.com), and a welcome message: 'Again, welcome to Salesforce!'. The top of the screen shows a search bar, filter icons, and a header with 'Active' and other settings.



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The screenshot shows the Salesforce 'Change Your Password' page. At the top, there's a blue cloud icon with the word 'salesforce'. Below it, the title 'Change Your Password' is centered. A note says: 'Enter a new password for 2k21cse176@kiot.ac.in. Make sure to include at least:' followed by three green checkmarks: '8 characters', '1 letter', and '1 number'. There are two input fields: 'New Password' containing '.....' with a status 'Good' and 'Confirm New Password' containing '.....' with a status 'Match'. Below these is a note 'Caps Lock Is on.' A 'Security Question' section asks 'In what city were you born?' with the answer 'SALEM'. A 'Change Password' button is at the bottom.



The screenshot shows the Salesforce Setup interface, specifically the 'Profiles' section under 'User Management'. The left sidebar has a 'Setup' icon, 'Home', and 'Object Manager' tabs. Under 'ADMINISTRATION', 'Profiles' is selected. The main area shows a 'Profile Edit' screen for 'Bmanager'. The 'Profile Edit' form includes fields for 'Name' (Bmanager), 'User License' (Salesforce Platform), 'Description' (empty), and a 'Custom Profile' checkbox which is checked. Below this is a 'Custom App Settings' table:

	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"/>

Below the table are sections for 'Service Provider Access' and 'Tab Settings'. In 'Tab Settings', there's a checkbox 'Override users' personal tab customizations' and a dropdown 'Standard Tab Settings' set to 'Default On'. A 'Help for this Page' link is also present.



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

- Left Sidebar:**
 - Setup
 - Home
 - Object Manager
 - Hyperforce Assistant
 - Release Updates
 - Lightning Experience Transition Assistant
 - Salesforce Mobile App
 - Lightning Usage
 - Optimizer
 - ADMINISTRATION
 - Users
 - Permission Set Groups
 - Permission Sets
 - Profiles** (selected)
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
 - Users
 - Data
 - Email
 - PLATFORM TOOLS
 - Subscription Management
- Content Area:**

SETUP Profiles

	Contacts	Contact Point Addresses	Contact Point Consents	Contact Point Emails	Push Topics	Sellers	Streaming Channels	User External Credentials
Read	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Modify All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

	Brokers	Childs	Parents	Properties
Basic Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Read	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Modify All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

For User B:

1. Follow the same steps as above but create a separate sharing rule for User B.
2. This rule should share records owned by members of "UserA_Group" with the "UserB_Group."
3. Define the criteria based on which records should be shared.
4. Save the sharing rule.



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The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A new user is being created with the following details:

- General Information**:
 - First Name: Sanjay
 - Last Name: P
 - Alias: sp
 - Email: 2k20cse171@kiot.ac.in
 - Username: 2k22cse171@kiot.ac.in
 - Nickname: User1696315620912300622
 - Title: (empty)
 - Company: (empty)
 - Department: (empty)
 - Division: (empty)
- Role**: <None Specified>
- User License**: Salesforce Platform
- Profile**: Bmanager
- Active**: checked
- Marketing User**: unchecked
- Offline User**: unchecked
- Knowledge User**: unchecked
- Flow User**: unchecked
- Service Cloud User**: unchecked
- Site.com Contributor User**: unchecked
- Site.com Publisher User**: unchecked
- WDC User**: unchecked
- Data.com User Type**: --None--
- Data.com Monthly Addition**: Default Limit (300)
- Accessibility Mode (Classic Only)**: unchecked
- High-Contrast Palette on Charts**: unchecked
- Load Lightning Pages While**: (checkbox)

Step 3: Assign Records Ownership

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. A new permission set is being created with the following details:

- Enter permission set information**:
 - Label**: permission
 - API Name**: permission
 - Description**: (empty)
 - Session Activation Required**: unchecked
- Select the type of users who will use this permission set**:
 - Who will use this permission set?**:
 - 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.
 - Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
 - Not sure what a permission set license is? [Learn more here.](#)**
 - License**: --None--



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

Left Navigation Bar:

- 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
 - Users
 - Data
 - Email
- PLATFORM TOOLS
 - Subscription Management

Top Bar:

- Setup
- Home
- Object Manager

Page Header:

SETUP **Permission Sets** Video Tutorial | Help for this Page ?

Page Content:

Permission Set permission

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings ▾

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	--

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 - Data
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- PLATFORM TOOLS
 - Subscription Management

Top Bar:

- Setup
- Home
- Object Manager

Page Header:

SETUP **Permission Sets** Video Tutorial | Help for this Page ?

Page Content:

Permission Set permission

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings ▾ **Childs** ▾

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



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The screenshot shows the Salesforce Setup interface. The left sidebar navigation includes: Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-options: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), Data, Email, and PLATFORM TOOLS. The main content area is titled "PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION" and "permission". It displays a table titled "Select Users to Assign" with the heading "All Users". The table columns are: Full Name, AI..., Username, R..., A..., Profile. There is one item selected: "Sunil A" (sa) with the email "2k21cse176@kiot.ac.in" and profile "Manager". A "Next" button is visible at the bottom right.

The screenshot shows the continuation of the Salesforce Setup interface. The left sidebar navigation is identical to the previous screen. The main content area is titled "PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION" and "permission". It displays a table titled "Selected Users" with the heading "Full Name, Role, Profile, Active, User License, Expires On". One user is listed: "Sunil A" (sa) with the role "Manager", profile "Salesforce Platform", and "Expires On" set to "Never Expires". To the right of the table is a "Time Zone" dropdown labeled "Select a time zone...". At the bottom right are "Back" and "Assign" buttons.



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The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), Data, Email, Platform Tools, and Subscription Management. The main content area displays a success message: "... > PERMISSIONS > Assignments > permission" with "1 assignments were successful." A table titled "Assignment Summary" lists one assignment: "Sunil A" with "Salesforce Platform" User License, "Expires On" set to "--", "Time Zone" set to "--", and "Status" marked as "Success". A "Done" button is at the bottom right.

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), Data, Email, Platform Tools, and Subscription Management. The main content area displays a table titled "Permission Sets" showing various permission sets and their access levels. The table includes columns for permission names like "Operating_Hours_Holidays", "Opportunities", "Opportunity_Contact_Role", "Opportunity_Product", "Order_Products", "Orders", "Parents", "Party_Consent", "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" column shows values like "No Access", "26", "6", "14", "15", "33", "4", "18", "24", "30", "--", "6", "1", "20", "41", "--", "9", "6", "--", "10", "21", "--", "--", "12", "3", and "2".



Edit with WPS Office

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

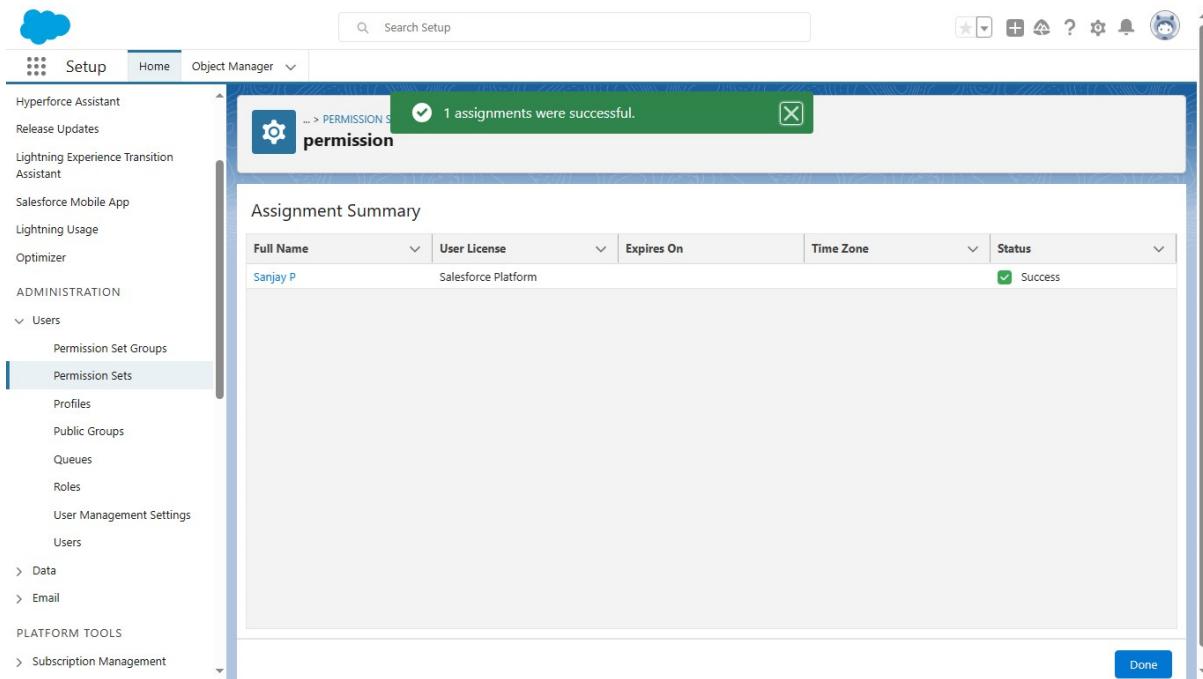
- Left Navigation Bar:** Includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-links for Users, Permission Set Groups, and Permission Sets), Data, Email, and PLATFORM TOOLS.
- Current Page:** The main content area is titled "Permission Sets" under the "SETUP" tab. It displays the "permission" permission set. The "Parents" section shows "Available" and "Visible" profiles. The "Object Permissions" section lists permissions for "Read", "Create", "Edit", "Delete", "View All", and "Modify All". The "Field Permissions" section lists permissions for "Child" and "Created By".
- URL:** The URL in the browser bar is https://aws-36e-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/OP5j000007Uxoi/e?__s=EntityPermissions&o=01l5j000002r5H&isdt=p1.

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

- Left Navigation Bar:** Same as the previous screenshot, showing ADMINISTRATION with the "Permission Sets" link selected.
- Current Page:** The main content area is titled "permission" under the "PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION" header. It displays the "Select Users to Assign" section. The "All Users" dropdown is open, showing a list of users with checkboxes next to their names. The user "Sanjay P" has a checked checkbox. Other users listed include Chandru S, Chatter Expert, Integration User, and Security User.
- Buttons:** At the bottom right of the user list are "Cancel" and "Next" buttons.



Edit with WPS Office



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.



Edit with WPS Office

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
- Apps
- Feature Settings
- Slack
- MuleSoft
- Einstein

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](#)

View: All Users | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	A_Sundar	sa	2k21cs176@knot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager
Edit	Chatter_Expert	Chatter	chatty_00d500000cismgean.eodfzibserf@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Edit	P_Sanjay	sq	2k22cs171@knot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bmanager
Edit	S_Chandru	CS	au611220104303@naanmudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@00d500000cismgean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d500000cismgean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | [Other](#) | [All](#)

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
- Apps
- Feature Settings
- Slack
- MuleSoft
- Einstein

SETUP Profiles

All Profiles

On this page you can create, view, and manage profiles.

Action	Profile Name	User License
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User
Edit Clone	Authenticated Website	Authenticated Website
Edit Clone	Authenticated Website	Authenticated Website
Edit Del ...	Bmanager	Salesforce Platform
Edit Clone	Chatter External User	Chatter External
Edit Clone	Chatter Free User	Chatter Free
Edit Clone	Chatter Moderator User	Chatter Free
Edit Clone	Contract Manager	Salesforce
Edit Clone	Cross Org Data Proxy User	XOrg Proxy User
Edit Del ...	Custom Marketing Profile	Salesforce
Edit Del ...	Custom Sales Profile	Salesforce
Edit Del ...	Custom Support Profile	Salesforce
Edit Clone	Customer Community Login User	Customer Community Login
Edit Clone	Customer Community Plus Login User	Customer Community Plus Login
Edit Clone	Customer Community Plus User	Customer Community Plus

[New Profile](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | [Other](#) | [All](#)

1-25 of 41 | 0 Selected | [Previous](#) [Next](#) | Page 1 of 2

<https://aws-36e-dev-ed.develop.lightning.force.com/one/app#/setup/EnhancedProfiles/home>



Edit with WPS Office

Setup Home Object Manager

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	Manager

Save Cancel

Setup Home Object Manager

Profiles

Profile Detail

chan

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

Name	chan
User License	Salesforce Platform
Description	
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	Operating Hours
Email Application	Not Assigned	Order
Home Page Layout	Home Page Default	Order Product
Account	Account Layout	Payment
Alternative Payment Method	Alternative Payment Method Layout	Payment Authorization
Appointment Invitation	Appointment Invitation Layout	Payment Authorization Adjustment
Asset	Asset Layout	Payment Gateway



Edit with WPS Office

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with various links like 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 Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings). The main content area is titled "Profiles" and contains two tables for "Basic Access" and "Data Administration" for Brokers, Parents, and Properties. Below these are sections for "Session Settings" (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login: None) and "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, and Don't immediately expire links in forgot password emails). At the bottom are Save, Save & New, and Cancel buttons.

The screenshot shows the "Profile Edit" screen for the "chan" profile. The sidebar on the left is identical to the one in the first screenshot. The main content area is titled "Profile Edit" and shows the "chan" profile details: Name (chan), User License (Salesforce Platform), and Description (Custom Profile checked). Below this is a "Custom App Settings" section with two tables for Analytics Studio, App Launcher, and Dreamhouse. The "Visible" column has checkboxes, and the "Default" column has radio buttons. The second table has checkboxes for Parent Details, Platform, and WDC. There are also sections for "Service Provider Access", "Tab Settings" (with a checkbox for Overwrite users' personal tab customizations), and "Standard Tab Settings" (with a "Default On" dropdown set to "Default On").



Edit with WPS Office

All Users

This page allows you to create, view, and manage users. You can download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A_Sunil	sa	2k21cse176@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty.00d500000cismgean.eodfzklbsrf@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	P_Sanay	sr	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bmanager
<input type="checkbox"/>	S_Chandru	CS	sa@11220104303@naannmudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	Integration@00d500000cismgean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightsecurity@00d500000cismgean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

User Edit

General Information

First Name: Sunil
Last Name: A
Alias: sa
Email: 2k21cse176@kiot.ac.in
Username: 2k21cse176@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--
Data.com Monthly Additional Limit: Default Limit (300)
Accessibility Mode (Classic Only):
High-Contrast Faded on Charts:
Load Lightning Pages While:



Edit with WPS Office

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'Sunil A'. The page includes sections for User Detail, Role, Profile, and various User License checkboxes. The 'User Detail' section contains fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, and Federation ID.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Edit' page for a user named 'Sunil A'. The page includes sections for General Information, Roles, and various User License checkboxes. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Roles' section includes a dropdown for 'Role' set to '<None Specified>' and a dropdown for 'Profile' set to 'Salesforce Platform'.



Edit with WPS Office

All Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A_Sunil	sa	2k21cse176@knot.ac.in		✓	chan
<input type="checkbox"/>	A_Sunil	sa	2k23cse176@knot.ac.in		✓	chan

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.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and ca...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Ama...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, subloc...	Salesforce
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mo...	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Limited access to Order Management features for Self Ser...	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper		



Edit with WPS Office

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, and Administration. Under Administration, the 'Users' section is expanded, and 'Permission Sets' is selected. The main content area displays the 'Permission Sets' page for a permission set named 'permission01'. A modal window titled 'Edit Properties' is open over the main content. In the 'Edit Properties' window, the 'Label' field is set to 'permission01', and the 'API Name' field is also set to 'permission01'. There is a 'Description' field which is currently empty. Below the properties, there are several sections: 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', and 'External Data Source Access'. At the bottom of the modal, there are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous screenshot, with 'Permission Sets' selected under the 'Users' section. The main content area shows the 'Permission Sets' page for 'permission01'. The top navigation bar includes tabs for 'Permission Set Overview', 'Object Settings', and 'Accounts'. The 'Object Settings' tab is active. Under 'Object Settings', there are two sections: 'Object Permissions' and 'Field Permissions'. In 'Object Permissions', there is a table with columns 'Permission Name' and 'Enabled'. The rows listed are Read, Create, Edit, Delete, View All, and Modify All, all of which have the 'Enabled' checkbox checked. In 'Field Permissions', there is a table with columns 'Field Name', 'Read Access', and 'Edit Access'. The rows listed are Account Name, Account Number, Account Owner, Account Site, Account Source, Active, and Annual Revenue. For most fields, both 'Read Access' and 'Edit Access' are checked, except for Account Number where only 'Read Access' is checked.



Edit with WPS Office

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab 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, ADMINISTRATION, and Users. Under 'Users', 'Permission Set Groups' and 'Permission Sets' are listed, with 'Permission Sets' being the active tab. The main content area displays the 'permission01' permission set details. It shows 'Object Permissions' for 'Accounts' and 'Field Permissions' for various account fields like Account Name, Account Number, Account Owner, etc.

The screenshot shows the Salesforce Setup interface with the 'All Users' tab 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, ADMINISTRATION, and Users. Under 'Users', 'Permission Set Groups' and 'Permission Sets' are listed, with 'Permission Sets' being the active tab. The main content area displays a list of users with columns for Full Name, Username, Role, Ac..., and Profile. Two users, Sunil A and Sunil A, have checkboxes checked in the 'Role' column.



Edit with WPS Office

The screenshot shows the Salesforce Setup interface under the 'Users' section. On the left, the navigation menu includes 'Permission Set Groups', 'Permission Sets' (which is selected), 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'Selected Users' and displays two rows of user information:

Full Name	Role	Profile	Active	User License	Expires On
Sunil A		chan	✓	Salesforce Platform	Never Expires
Sunil A		chan	✓	Salesforce Platform	Never Expires

At the bottom right are 'Back' and 'Assign' buttons.

The screenshot shows the Salesforce Setup interface under the 'Users' section. The 'Assignment Summary' table shows two successful assignments:

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

A green success message at the top states "... > PERMISSION SETS ... permission01 2 assignments were successful." At the bottom right is a 'Done' button.

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.



Edit with WPS Office

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

4. Click Save.

The screenshot shows the Salesforce Object Manager interface. At the top, it says "SETUP > OBJECT MANAGER" and "Survey Result". On the left, there's a sidebar with various options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, Triggers, and Validation Rules. The main area is titled "Fields & Relationships" and shows a table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Comment (Comment__c, Text Area(255)), Created By (CreatedById, Lookup(User)), Email (Email__c, Email), Last Modified By (LastModifiedById, Lookup(User)), Name (Name__c, Text(51)), Owner (OwnerId, Lookup(User,Group)), Rating (Rating__c, Picklist), and Survey Result Name (Name, Auto Number). There are also "New", "Deleted Fields", "Field Dependencies", and "Set History Tracking" buttons at the top of the table.

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



Edit with WPS Office

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

Message Content

Subject Thank You For Completing Our Survey!	Enhanced Letterhead
HTML Value	<p>Hi {{Survey_Result__c.Name__c}},</p> <p>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.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>

Additional Information

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



Edit with WPS Office

Edit Email Alert Help for this Page 
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		Save	Save & New	Cancel						
Edit Email Alert = Required Information										
Description	Survey - Thank You Email									
Unique Name	Survey_Thank_You_Email 									
Object	Survey Result									
Email Template	Thank You Email - Survey 									
Protected Component	<input type="checkbox"/>									
Recipient Type	Search: <input type="text" value="User"/>  for: <input type="text"/> <input type="button" value="Find"/>									
Recipients	<table border="1"> <thead> <tr> <th>Available Recipients</th> <th>Selected Recipients</th> </tr> </thead> <tbody> <tr> <td>User: Integration User User: Rakesh Gupta User: Security User</td> <td>Email Field: Email</td> </tr> <tr> <td colspan="2"> <input data-bbox="579 796 610 818" type="button" value="Add"/> <input data-bbox="579 841 610 863" type="button" value="Remove"/> </td> </tr> </tbody> </table>				Available Recipients	Selected Recipients	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email	<input data-bbox="579 796 610 818" type="button" value="Add"/> <input data-bbox="579 841 610 863" type="button" value="Remove"/>	
Available Recipients	Selected Recipients									
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email									
<input data-bbox="579 796 610 818" type="button" value="Add"/> <input data-bbox="579 841 610 863" type="button" value="Remove"/>										
You can enter up to five (5) email addresses to be notified.										
Additional Emails	<input type="text"/> <input type="checkbox"/> Make this address the default From email address for this object's email alerts. 									
From Email Address	<input type="text"/> Current User's email address  <input type="checkbox"/> Make this address the default From email address for this object's email alerts. 									
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="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



Edit with WPS Office

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 with WPS Office

Edit Create Records

Create Salesforce records using values from the flow.

* Label	* API Name
<input type="text" value="Save Response"/>	<input type="text" value="Save_Response"/>
Description	
<input type="text"/>	

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

<input type="text" value="Survey Result"/>
--

Set Field Values for the Survey Result

Field	Value
<input type="text" value="Comment__c"/>	<input type="text" value="A_a Comment"/> ← A_a Comment > Value X Delete
<input type="text" value="Email__c"/>	<input type="text" value="A_a Email > Value"/> ← A_a Email > Value > Value X Delete
<input type="text" value="Name__c"/>	<input type="text" value="(!Name.firstName) (!Name.lastName)"/> ← (!Name.firstName) (!Name.lastName) > Value X Delete
<input type="text" value="Rating__c"/>	<input type="text" value="A_a Rating"/> ← A_a Rating > Value X Delete
+ Add Field	
<input type="checkbox"/> 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 with WPS Office

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

A_a * Record ID

{!Save_Response}

Cancel

Done



Edit with WPS Office

Save as

A New Version A New Flow

* Flow Label Survey * Flow API Name Survey

Description

Hide Advanced

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

* Type Screen Flow

* API Version for Running the Flow 51

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

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

Status: Active Type: Screen Flow Version Number: 2

Cancel Save

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.



Edit with WPS Office

The screenshot shows a code editor window with the following content:

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

The file is titled "VFPageToLC.app". The status bar at the bottom indicates "Logs, Tests, and Problems".



Edit with WPS Office

Visualforce Page
Survey

Page Edit

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

```

1 <apex:page showheader="false" lightningStylesheets="true">
2 <html>
3   <head>
4     <apex:includeLightning />
5     <!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualf
6   </head>
7   <body class="slds-scope">
8     <div id="flowContainer" />
9     <script>
10
11       var statusChange = function (event) {
12         if(event.getParam("status") === "FINISHED") {
13           var outputVariables = event.getParam("outputVariables");
14           var key;
15           for(key in outputVariables) {
16             if(outputVariables[key].name === "myOutput") {
17               ...
18             }
19           }
20         }
21       $Lightning.use("c:VFPPageToLC", function() {
22         $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
23           "flowContainer",
24           function (component) {
25             component.startFlow("Survey", );
26           }
27         );
28       });
29     </script>
30   </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.



Edit with WPS Office

Site Edit

Save Cancel

Site Label	Survey
Site Name	Survey
Site Description	<div style="border: 1px solid black; height: 100px; width: 100%;"></div>
Site Contact	Rakesh Gupta
Default Record Owner	Rakesh Gupta
Default Web Address	http://katihar-developer-edition.gus.force.com/ survey
Active	<input checked="" type="checkbox"/>
Active Site Home Page	Survey [Preview]
Inactive Site Home Page	InMaintenance [Preview]
Site Template	SiteTemplate
Site Robots.txt	<input type="text"/>
Site Favorite Icon	<input type="text"/>
Analytics Tracking Code	<input type="text"/>
URL Rewriter Class	<input type="text"/>
Enable Feeds	<input type="checkbox"/>
Clickjack Protection Level	Allow framing by the same origin only (Recommended)
Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/>
Lightning Features for Guest Users	<input checked="" type="checkbox"/>
Upgrade all requests to HTTPS	<input checked="" type="checkbox"/>
Enable Content Sniffing Protection	<input checked="" type="checkbox"/>
Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/>
Referrer URL Protection	<input checked="" type="checkbox"/>
Guest Access to the Payments API	<input type="checkbox"/>



Edit with WPS Office

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

5

*Comment

Awesome Blog

Next

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



Edit with WPS Office

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.



Edit with WPS Office