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SALESFORCE DEVELOPER(COURSE)
ASSIGNMENT NO 1

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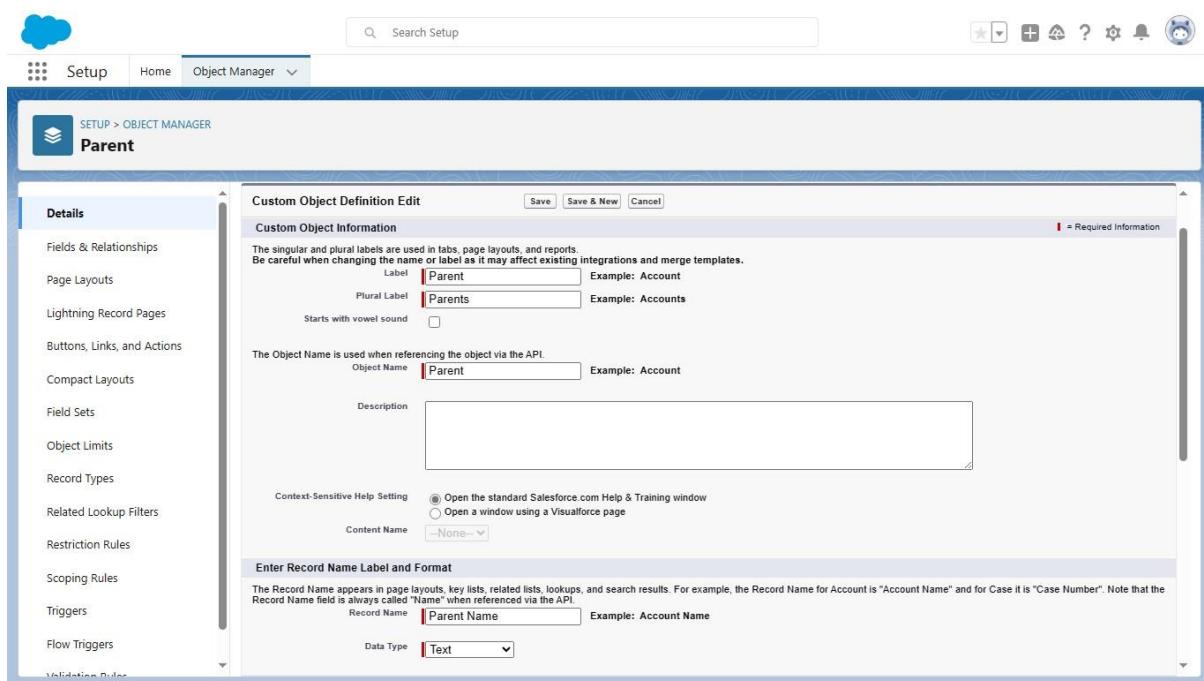
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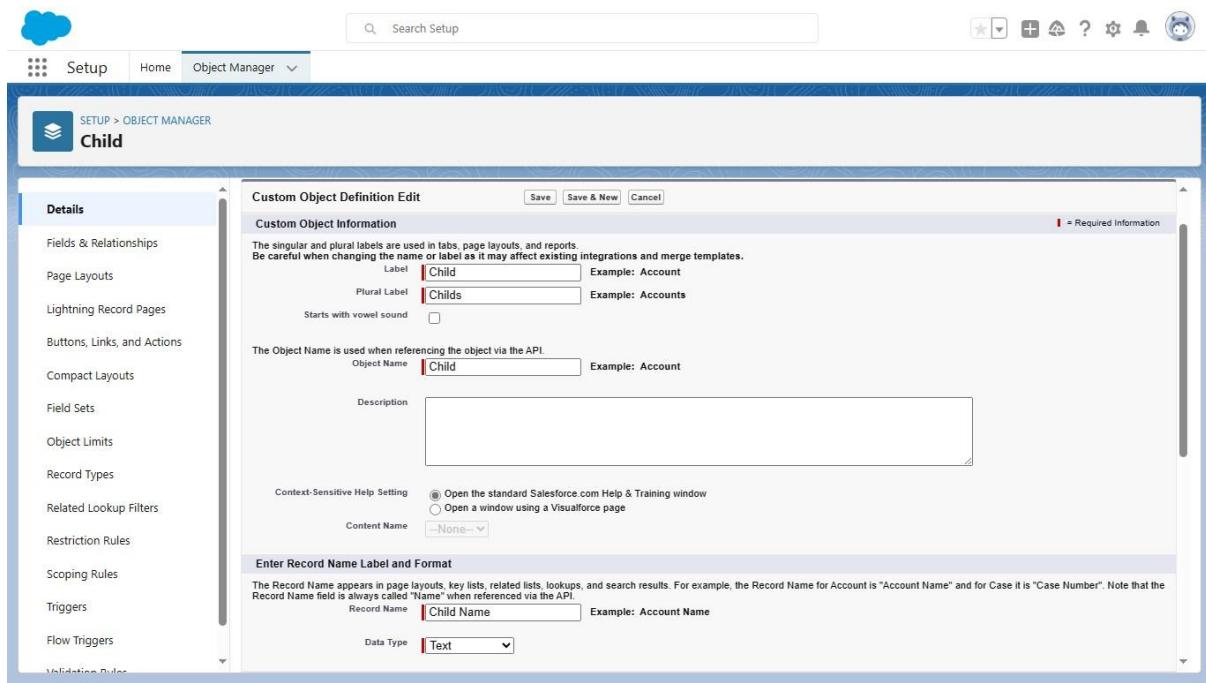
BATCH : 2024

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.**

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup' and a toolbar has icons for star, plus, question mark, etc. The main area is titled 'SETUP > OBJECT MANAGER Parent'. On the left, a sidebar lists 'Fields & Relationships' and other setup categories like Page Layouts, Lightning Record Pages, etc. The right pane is titled 'Fields & Relationships' with a sub-header '4 Items, Sorted by Field Label'. It contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows are:

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)		✓

This screenshot shows the 'New Custom Field' wizard for the Parent object. The top navigation bar and sidebar are identical to the previous screenshot. The main area is titled 'Parent New Custom Field' and 'Step 1. Choose the field type'. It says 'Specify the type of information that the custom field will contain.' A 'Data Type' section lists several options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship', 'Master-Detail Relationship' (selected), and 'External Lookup Relationship'. Each option has a detailed description below it. Buttons for 'Next' and 'Cancel' are at the bottom right.

Setup Home Object Manager

SETUP > OBJECT MANAGER Parent

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Restriction Rules Scoping Rules Triggers Flow Triggers Validation Rules

New Relationship Step 2. Choose the related object Step 2 of 6

Select the other object to which this object is related.

Related To Child

Help for this Page

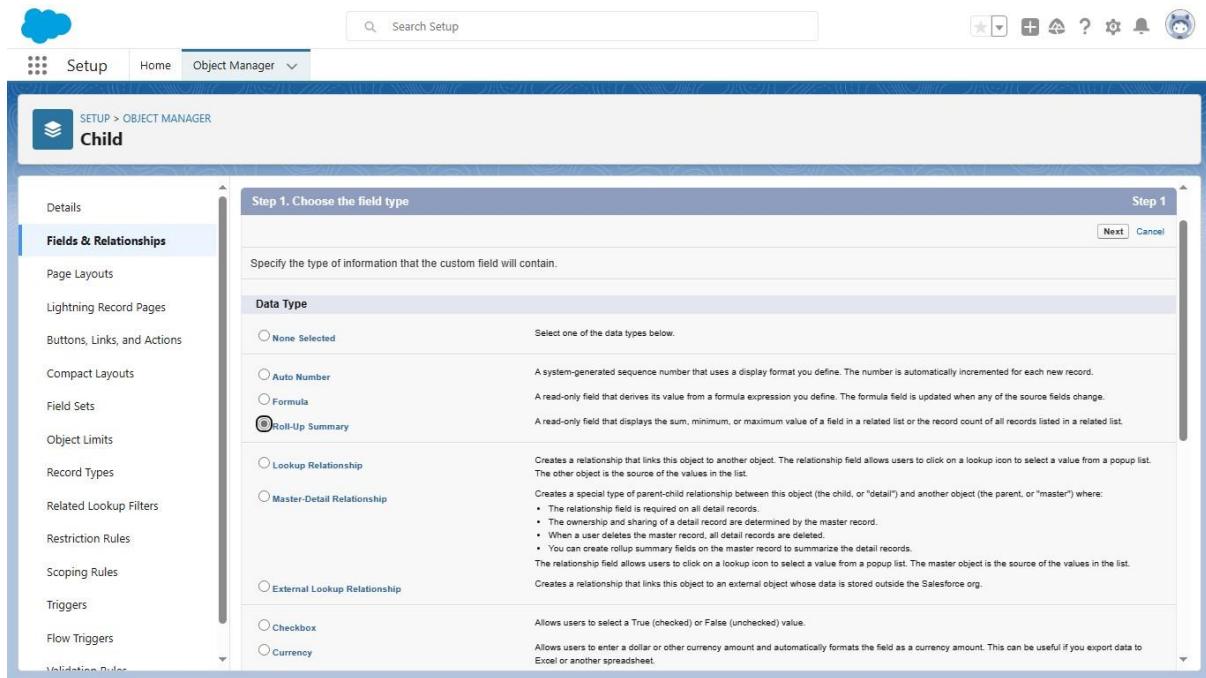
Setup Home Object Manager

SETUP > OBJECT MANAGER Child

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Restriction Rules Scoping Rules Triggers Flow Triggers Validation Rules

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)		



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.**

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has sections for 'User Interface' (Loaded Console Tab Limit, Rename Tabs and Labels) and 'Tabs'. A note says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section includes a 'New' button and a 'What Is This?' link. The 'Custom Object Tabs' section lists tabs for 'Brokers' (People tab style), 'Childs' (Lightning tab style), 'Parents' (Lightning tab style), and 'Properties' (Real Estate Sign tab style). The 'Web Tabs' section says 'No Web Tabs have been defined'. The 'Visualforce Tabs' section says 'No Visualforce Tabs have been defined'. The 'Lightning Component Tabs' section says 'No Lightning component tabs have been defined'. The 'Lightning Page Tabs' section includes a table with columns for Action, Label, Tab Style, and Description.

Action	Label	Tab Style	Description
Edit Del	Brokers	People	
Edit Del	Childs	Lightning	
Edit Del	Parents	Lightning	
Edit Del	Properties	Real Estate Sign	

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.

Lightning Experience App Manager

App Name ↑	Developer Name	Description	Last Modified ...	Type	Vis...
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

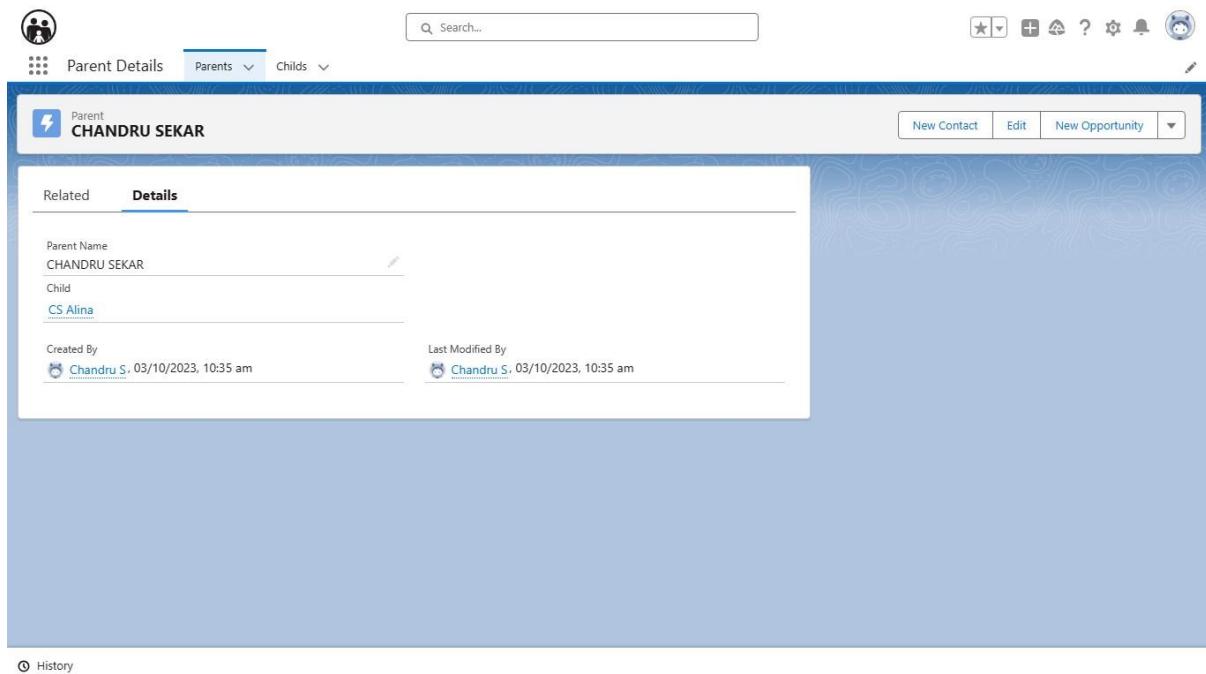
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details	App Branding
* App Name <small>i</small> Parent Details	Image <small>i</small> <input type="button" value="Upload"/>
* Developer Name <small>i</small> Chandru s	Primary Color Hex Value <small>i</small> #0070D2
Description <small>i</small> 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	
<input checked="" type="radio"/> 13 Queue Management QueueManagement Create and manage queues for your business. 22/08/2023, 11:15 am Lightning ✓ <input type="radio"/> 14 Sales Sales The world's most popular sales force automation (SFA) sol... 22/08/2023, 11:15 am Classic ✓ <input type="radio"/> 15 Sales LightningSales Manage your sales process with accounts, leads, opportun... 22/08/2023, 11:15 am Lightning ✓	

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.

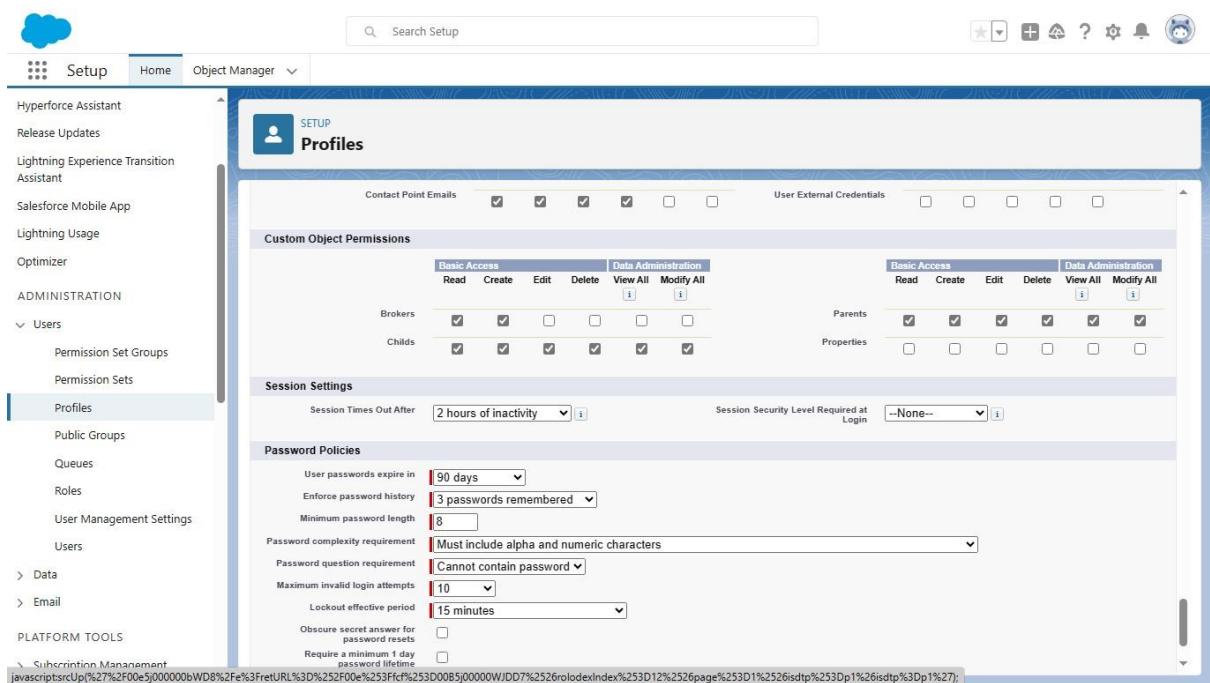
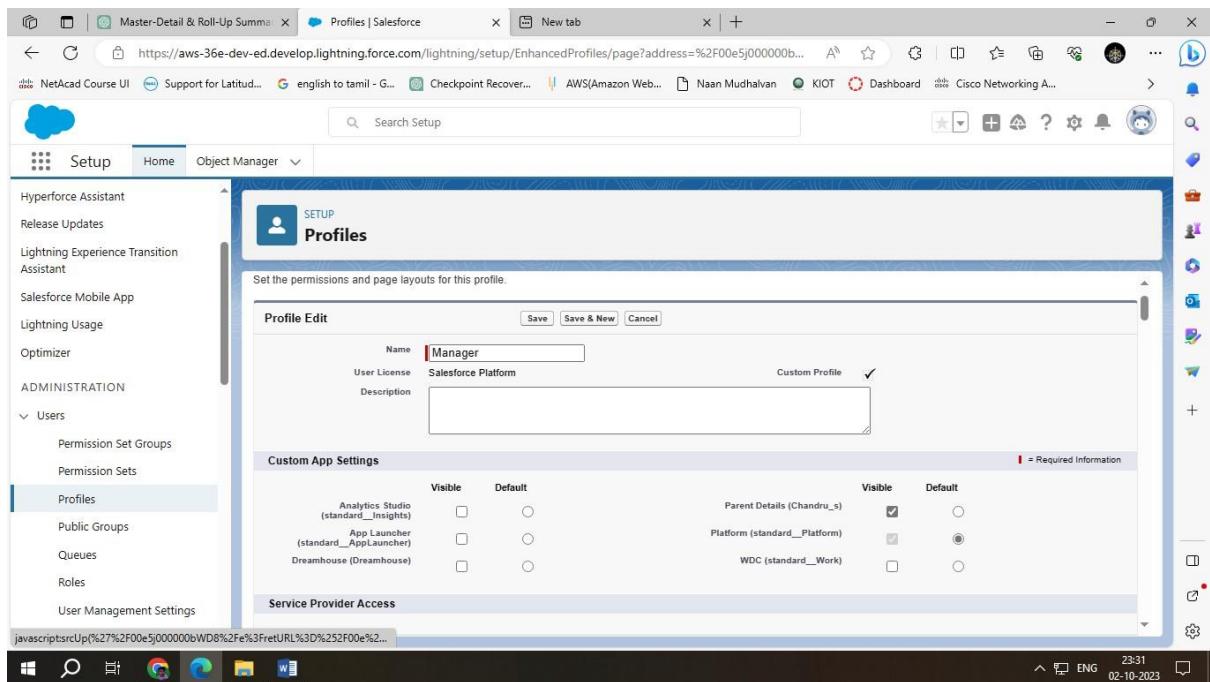
THAT'S IT! YOU'VE SUCCESSFULLY CREATED A MASTER-DETAIL RELATIONSHIP BETWEEN TWO CUSTOM OBJECTS (PARENT AND CHILD) AND SET UP A ROLL-UP SUMMARY FIELD TO CALCULATE THE TOTAL NUMBER OF RECORDS IN THE CHILD OBJECT.



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."

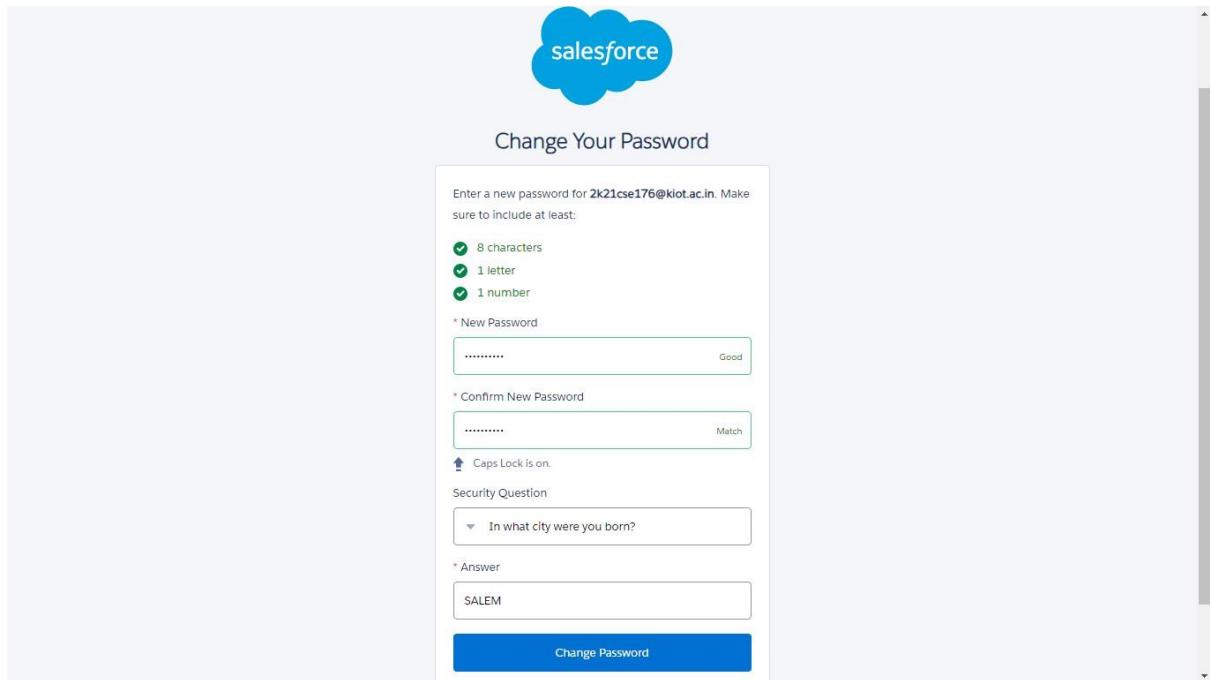
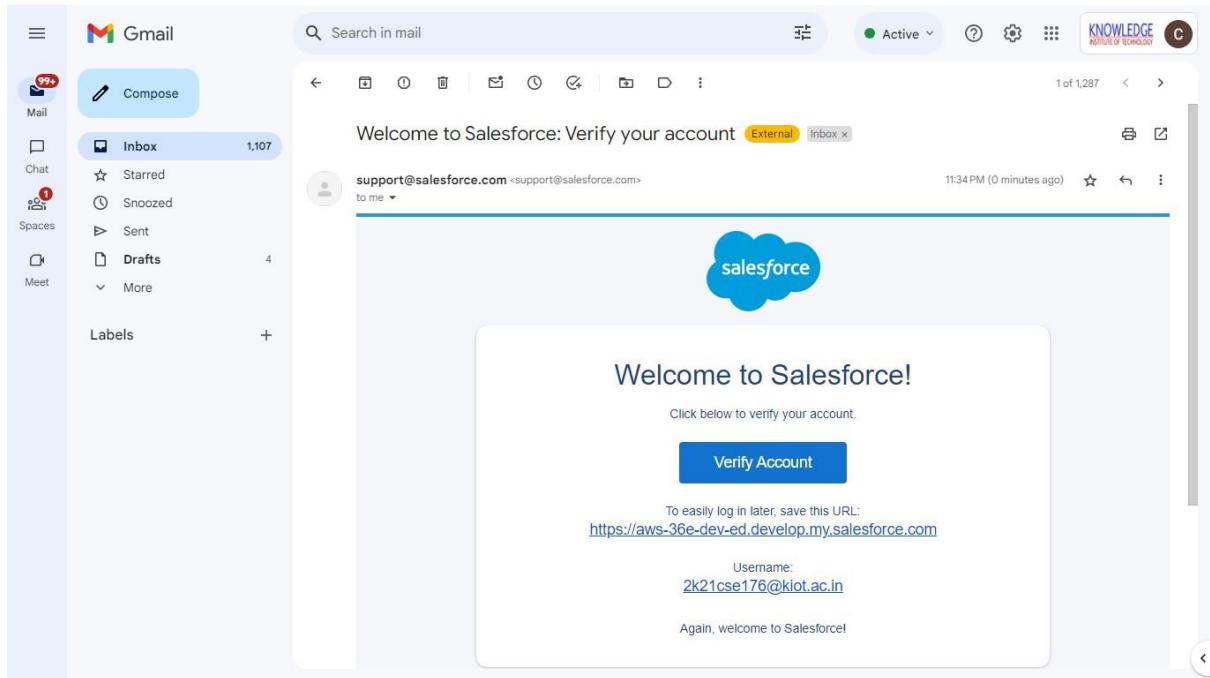
4. CREATE A RULE THAT SHARES RECORDS OWNED BY MEMBERS OF "USERB_GROUP" WITH THE "USERA_GROUP."

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

6. SAVE THE SHARING RULE.

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing options like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, and various Administration sections including Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, and User Management Settings. The 'Users' section is currently selected. In the main content area, a 'New User' page is displayed under the 'User Edit' tab. The 'General Information' section contains fields for First Name (Sunil), Last Name (A), Alias (sa), Email (2k20cse176@kiot.ac.in), Username (2k21cse176@kiot.ac.in), Nickname (User169631476178576A938), Title (Male), Company (Male), Department (Division), and Role (None Specified). Other tabs like 'Sharing' and 'Advanced' are visible at the bottom of the edit screen. The top right corner has a 'Help for this Page' link.

The screenshot shows the Salesforce Setup interface, similar to the previous one but with a different user selected. The navigation sidebar is identical. In the main content area, the 'User Detail' page for 'Sunil A' is displayed. The 'User Detail' tab is active, showing the same general information as the previous screenshot. Below this, there are additional sections for Address (2/3 Kolankondai(p.o) Malasamudram 637503 Tamil Nadu India), Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata), Locale (English (India)), Language (English), Delegated Approver (Manager), Receive Approval Request Emails (Only if I am an approver), and Federation ID. The 'Sharing' tab is also visible at the bottom. The top right corner has a 'User Profile Help for this Page' link.



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		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"/>	Parents	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
Children	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Properties	<input checked="" type="checkbox"/>	<input type="checkbox"/>								

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

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

FOR USER B:

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

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

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

4. SAVE THE SHARING RULE.

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

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

Field	Value
Label	permission
API Name	permission
Description	
Session Activation Required	<input type="checkbox"/>
Select the type of users who will use this permission set	
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--

Setup Home Object Manager

Permission Sets

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 Invites	--	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	--

Setup Home Object Manager

Permission Sets

Permission Set permission

Childs

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"/>

Setup Home Object Manager

... > PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION

permission

Select Users to Assign

All Users

1 item selected

Full Name	Role	Username	Profile
Chandru S	CS	au611220104303@naanmudhalvan.com	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzikbsrf@chatter.salesforce.com	Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	Analytics Cloud Integration User
Sanjay P	sp	2k22cse171@kiot.ac.in	Bmanager
Security User	sec	insightsecurity@00d5j00000cismqean.com	Analytics Cloud Security User
Sunil A	sa	2k21cse176@kiot.ac.in	Manager

Cancel Next

Subscription Management aws-3fe-dev-ed.develop.lightning.force.com/lightning/r/0055j000009Zv6qAAC/vi...

Setup Home Object Manager

... > PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION

permission

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

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

Cancel Back Assign

Subscription Management

Setup Home Object Manager

Hyperfase 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

... > PERMISSIONS permission

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Sunil A	Salesforce Platform			<input checked="" type="checkbox"/> Success

Done

1 assignments were successful.

Setup Home Object Manager

Hyperfase 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

Operating Hours Holidays

	No Access	/	--
Opportunities	No Access	26	--
Opportunity Contact Role	No Access	6	--
Opportunity Product	No Access	14	--
Order Products	No Access	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	No Access	9	--
Price Books	No Access	6	--
Privacy Consents	No Access	--	--
Problem Related Items	No Access	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	No Access	3	--
Product Attribute Set Products	No Access	2	--

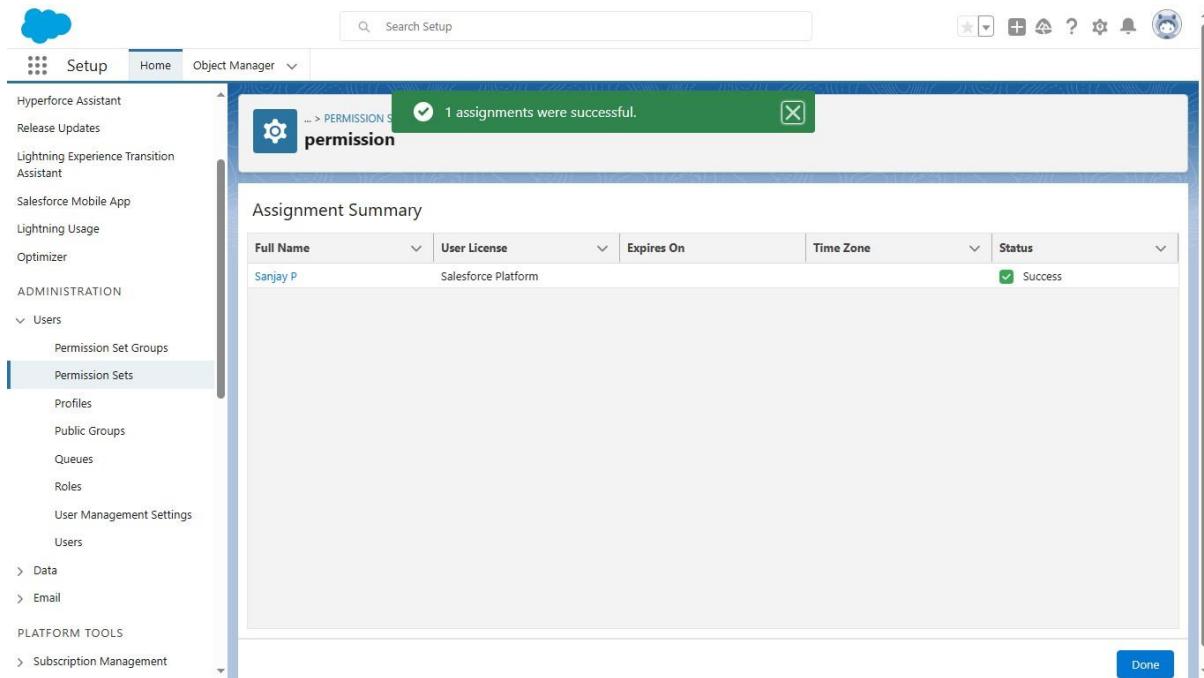
The screenshot shows the Salesforce Setup interface with the following details:

- Left Sidebar:** Shows the navigation menu under "ADMINISTRATION" with "Permission Sets" selected.
- Header:** "Search Setup" and various setup icons.
- Page Title:** "SETUP Permission Sets permission".
- Section:** "Permission Set Overview > Object Settings > Parents".
- Parents:** A table with columns "Available" and "Visible".
- Tab Settings:** A table with columns "Permission Name" and "Enabled".
- Object Permissions:** A table with columns "Permission Name" and "Enabled".
- Field Permissions:** A table with columns "Field Name", "Read Access", and "Edit Access".

A URL in the address bar: <https://aws-36e-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/0P55j000007Uxoi/e?s=EntityPermissions&o=011j000002rl5H&isdtp=p1>

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

- Left Sidebar:** Shows the navigation menu under "ADMINISTRATION" with "Permission Sets" selected.
- Header:** "Search Setup" and various setup icons.
- Page Title:** "SETUP permission ... > PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION".
- Section:** "Select Users to Assign".
- Table:** "All Users" table with columns: Full Name, Alias, Username, Role, Ac..., Profile. It lists users including Chandru S, Chatter Expert, Integration User, Sanjay P, and Security User. The "Sanjay P" row has a checked checkbox in the "Role" column.
- Buttons:** "Cancel" and "Next" 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.

Users

All Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit A_Sunil	sa	2k21cse176@kiot.ac.in		<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Edit Chatter Expert	Chatter	chatty.00d5000000cismqe0n.eodfzlkbsrf@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit P_Sanjay	sr	2k22cse171@kiot.ac.in		<input checked="" type="checkbox"/>	Bmanager
<input type="checkbox"/>	Edit S_Chandru	CS	gu811220104303@naannudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit User_Integration	integ	integration@00d5000000cismqe0an.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit User_Security	sec	insightssecurity@00d5000000cismqe0an.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Profiles

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Edit Clone Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ... Bmanager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ... Custom_Marketing_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Del ... Custom_Sales_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Del ... Custom_Support_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone Customer_Community_Login_User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Customer_Community_Plus_Login_User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Customer_Community_Plus_User	Customer Community Plus	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface for cloning a profile. The left sidebar includes sections like 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), and Quick Find.

The main content area is titled "Clone Profile" under the "SETUP Profiles" header. It displays a form with the following fields:

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

Buttons at the bottom include "Save" and "Cancel". A help link "Help for this Page" is located in the top right corner.

The screenshot shows the Salesforce Setup interface for viewing the details of the 'chan' profile. The left sidebar includes sections like 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), and Quick Find.

The main content area is titled "Profile chan" under the "SETUP Profiles" header. It displays the following profile details:

Name	chan	User License	Salesforce Platform	Description	Created By	Modified By
					Chandru S	03/10/2023, 1:50 pm

Below the profile detail, there is a section for "Page Layouts" showing various standard object layouts assigned to the profile.

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

Help

SETUP Profiles

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

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

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

Help

SETUP Profiles

Profile Edit
chan

Set the permissions and page layouts for this profile.

Profile Edit

Name: chan	Save Save & New Cancel
User License: Salesforce Platform	Custom Profile: <input checked="" type="checkbox"/>
Description:	

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings: Home | Default On | Learning | Default On

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

Help for this Page [?](#)

All Users

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

In addition, download Salesforce1 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_Sunil	sa	2k20cse176@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager
Edit	Chatter Expert	Chatter	chatty.00d500000cismgean.eodfz!kiber!@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Edit	P_Sanjay	sp	2k20cse171@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager
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

Search Setup

Help for this Page [?](#)

New User

User Edit

General Information

First Name	Sunil	Role	<None Specified>
Last Name	A	User License	Salesforce Platform
Alias	sa	Profile	chan
Email	2k20cse176@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	2k20cse176@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User1696321490080232961	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	Male	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Additional Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While	<input type="checkbox"/>

I = Required Information

Cloud icon

Setup Home

Search Setup

Home Object Manager

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

User Sunil A

Permission Set Assignments Activation Required Permission Set Group Assignments Personal Groups Public Group Membership Queue Membership Team Managers in the Role Hierarchy OAuth Apps Third-Party Account Links Installed Mobile Apps Authentication Settings for External Systems Login History User Provisioning Accounts

User Detail

Name	Sunil A	Role
Alias	sa	User License
Email	2k20cse176@kiot.ac.in [Verify]	Profile
Username	2k23cse176@kiot.ac.in	Active
Nickname	User1696314900802329619	Marketing User
Title		Offline User
Company	Male	Knowledge User
Department		Flow User
Division		Service Cloud User
Address	2/73 Bankandaip(o) Mallasamudram 637503 Tamil Nadu India	Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type
Manager		Accessibility Mode (Classic Only)
Receive Approval Request Emails	Only if I am an approver	Debug Mode
Expiration ID		High-Contrast Palette on Charts

Edit Sharing Reset Password Freeze

User Profile Help for this Page

Help for this Page

Cloud icon

Setup Home

Search 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 Users

User Edit Sunil A

General Information

First Name	Sunil	Role	<None Specified>
Last Name	A	User License	Salesforce Platform
Alias	sa	Profile	chan
Email	2k20cse176@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	2k21cse176@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User169631476178576A938	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	Male	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

Save Save & New Cancel

Help for this Page

The screenshot shows the Salesforce Setup interface with the 'Users' 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, Administration, and Users. The main content area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Two users are listed: 'A_Sunil' with alias 'sa' and username '2k21cse176@kiot.ac.in', and another 'A_Sunil' with alias 'sa' and username '2k23cse176@kiot.ac.in'. Both users have the role 'chan' and are marked as active.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	A_Sunil	sa	2k21cse176@kiot.ac.in	chan	✓	chan
Edit	A_Sunil	sa	2k23cse176@kiot.ac.in	chan	✓	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.**

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

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** 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 (with sub-items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings).
- Content Area:**
 - Section Header:** Permission Sets
 - Description:** On this page you can create, view, and manage permission sets. In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: [iOS](#) | [Android](#).
 - Table:** All Permission Sets (A-Z, All)
| Action | Permission Set Label | Description | License |
| --- | --- | --- | --- |
| | [Buyer](#) | Allows access to the store. Lets users see products and ca... | B2B Buyer Permission Set One Seat |
| | [Buyer Manager](#) | Includes all Buyer capabilities, and allows access to mana... | B2B Buyer Manager Permission Set One Seat |
| | [CRM User](#) | Denotes that the user is a Sales Cloud or Service Cloud u... | CRM User |
| | [Commerce Admin](#) | Allow access to commerce admin features. | Commerce Admin Permission Set License Seat |
| | [Contact Center Admin](#) | Manage Service Cloud Voice contact centers that use Ama... | Service Cloud Voice User |
| | [Contact Center Agent](#) | Access agent features in Service Cloud Voice contact cent... | Service Cloud Voice User |
| | [Contact Center Supervisor](#) | Access supervisor features in Service Cloud Voice contact... | Service Cloud Voice User |
| | [Del I Clone](#) | | Salesforce |
| | [Experience Profile Manager](#) | Lets users create, read, edit, and delete locations, subloc... | Facility Manager |
| | [FieldServiceMobileStandardPermSet](#) | Give your mobile workforce access to the Field Service mo... | Field Service Mobile |
| | [Merchandiser](#) | Allow access to commerce merchandising features. | Commerce Merchandiser User Permission Set License Seat |
| | [Order Management Agent](#) | Read Access to all entities enabled by Order Management | Lightning Order Management User |
| | [Order Management Operations Manager](#) | Access to all features enabled by Order Management | Lightning Order Management User |
| | [Order Management Shopper](#) | Limited access to Order Management features for Self Ser... | Lightning Order Management User |
| | [Order Management Superuser](#) | | Lightning Order Management Superuser |
 - Page Navigation:** 1-25 of 31, 0 Selected, Page 1 of 2.

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

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** 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 (with sub-items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings).
- Content Area:**
 - Section Header:** Permission Sets
 - Detail View:** Permission Set Overview for **permission01**.
 - Properties:** API Name: permission01, Namespace Prefix: , Created By: Chandru S., Last Modified By: Chandru S., Last Modified Date: 03/10/2023, Session Activation Required: .
 - Edit Properties Modal:** Label: permission01, API Name: permission01, Description: , Session Activation: i, Required: .
 - App Permissions:** Apex Class Access, Visualforce Page Access, External Data Source Access.

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, and Administration (with sub-links for Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and Help). The main content area is titled "Permission Sets" and shows a permission set named "permission01". It includes tabs for "Object Settings" and "Accounts". Under "Object Permissions" for "Accounts", the "Enabled" column has checkboxes for Read, Create, Edit, Delete, View All, and Modify All, all of which are checked. Under "Field Permissions" for "Accounts", the "Read Access" and "Edit Access" columns have checkboxes for Account Name, Account Number, Account Owner, Account Site, Account Source, Active, and Annual Revenue, with various combinations of checkboxes checked.

This screenshot is identical to the one above, showing the same setup of the Salesforce interface and the configuration of the "permission01" permission set. The "Accounts" tab is selected, displaying the object permissions and field permissions for the "Accounts" object. The "Enabled" column for object permissions has checkboxes for Read, Create, Edit, Delete, View All, and Modify All, all of which are checked. The "Field Permissions" section shows checkboxes for Account Name, Account Number, Account Owner, Account Site, Account Source, Active, and Annual Revenue, with various combinations of checkboxes checked.

Setup Home Object Manager

All Users

2 items selected

Full Name	Role	Profile
Chandru S	CS	System Administrator
Chatter Expert	Chatter	Chatter Free User
Integration User	integ	Analytics Cloud Integration User
Sanjay P	sp	Bmanager
Security User	sec	Analytics Cloud Security User
Sunil A	sa	chan
Sunil A	sa	chan

Cancel Next

Setup Home Object Manager

No expiration date

Specify the expiration date

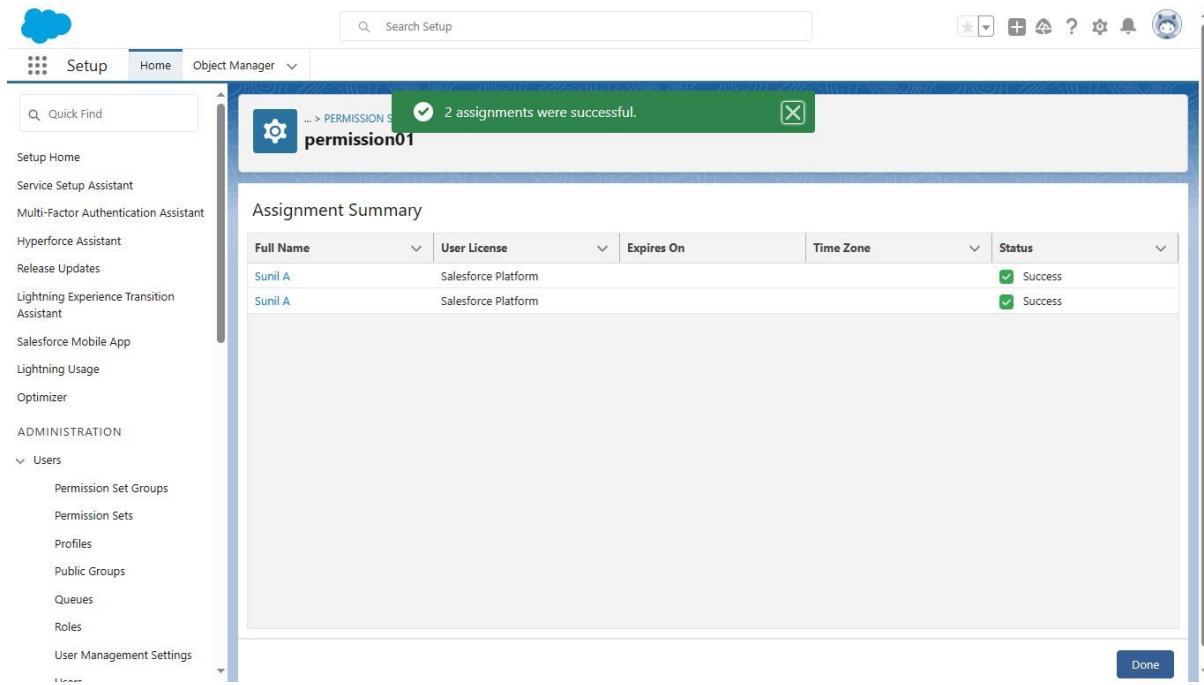
1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

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

Back Assign Cancel



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

STEP 1: CREATE A CUSTOM OBJECT

1. CLICK SETUP.

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

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

4. CLICK SAVE.



SETUP > OBJECT MANAGER
Survey Result

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

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

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

Email Template
Thank You Email - Survey

[Edit in Builder](#) [Edit](#) [Clone](#)

Details	Related
Information	
Email Template Name Thank You Email - Survey	Related Entity Type Survey Result
Description	Folder Public Email Templates
Made in Email Template Builder <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

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 Email Alert

Survey - Thank You Email

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

Email Alert Edit

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for:

Recipients:

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

Add Remove

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

Additional Emails

From Email Address: Current User's email address

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

Save Save & New Cancel

STEP 4.1: SALESFORCE FLOW – CREATE A SCREEN THAT ALLOW USERS TO FILL SURVEY

1.CLICK SETUP.

2.IN THE QUICK FIND BOX, TYPE FLOWS.

3.SELECT FLOWS THEN CLICK ON THE NEW FLOW.

4.SELECT THE SCREEN FLOW OPTION AND CLICK ON NEXT AND CONFIGURE THE FLOW AS FOLLOWS:

5.HOW DO YOU WANT TO START BUILDING: FREEFORM

6.WE WILL USE THE SCREEN ELEMENT TO CAPTURE A SURVEY RESPONSE FORM. DRAG AND DROP A SCREEN ELEMENT ONTO THE

CANVAS.

**STEP 4.2: SALESFORCE FLOW – ADD A RECORD CREATE 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 DROPODOWN 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 <input type="text" value="Save Response"/>	*API Name <input type="text" value="Save_Response"/>
Description <input type="text"/>	
How Many Records to Create <input checked="" type="radio"/> One <input type="radio"/> Multiple	
How to Set the Record Fields <input type="radio"/> Use all values from a record <input checked="" type="radio"/> 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 <input type="text" value="Comment__c"/>	Value <input type="text" value="A_a Comment X"/>
Field <input type="text" value="Email__c"/>	Value <input type="text" value="A_a Email > Value X"/>
Field <input type="text" value="Name__c"/>	Value <input type="text" value="(!Name.firstName) (!Name.lastName)"/>
Field <input type="text" value="Rating__c"/>	Value <input type="text" value="A_a Rating X"/>
<input type="button" value="+ Add Field"/>	
<input type="checkbox"/> Manually assign variables	
<input type="button" value="Cancel"/> <input type="button" value="Done"/>	

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

1. UNDER TOOLBOX, SELECT ELEMENT.
2. DRAG-AND-DROP ACTION ELEMENT ONTO THE FLOW DESIGNER.
3. IN THE ACTION BOX, TYPE SURVEY – THANK YOU EMAIL.

4.CLICKS ON THE SURVEY – THANK YOU EMAIL EMAIL ALERT.

5.CLICK DONE.

Edit "Survey - Thank You Email" email alert

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

*Label	*API Name
Send Thank You Email	Send_Thank_You_Email
Description	
<input type="text"/>	
Set Input Values	
A_a	*Record ID
{!Save_Response}	
<input type="button" value="Cancel"/> <input type="button" value="Done"/>	

Save as

A New Version
A New Flow

* Flow Label <input type="text" value="Survey"/>	* Flow API Name <input type="text" value="Survey"/>	
Description <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div>		
Hide Advanced		
How to Run the Flow ⓘ <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">User or System Context—Depends on How Flow is Launched</div> * Type <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Screen Flow</div> * API Version for Running the Flow <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">51</div>		
Interview Label ⓘ <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Insert a resource...</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Survey {!\$Flow.CurrentDateTime}</div>		
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.

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

The screenshot shows the Visualforce Page Editor interface. At the top, it says "Visualforce Page Survey". Below that is the "Page Edit" header with buttons for Save, Quick Save, Cancel, Where is this used?, Component Reference, and Preview. A "Help for this Page" link is in the top right corner.

The main area is titled "Page Information" with a note "1 = Required Information". It includes fields for Label (Survey), Name (Survey), Description (empty), and checkboxes for "Available for Lightning Experience, Experience Builder sites, and the mobile app" (checked) and "Require CSRF protection on GET requests" (unchecked).

At the bottom, there are tabs for "Visualforce Markup" (selected) and "Version Settings". The "Visualforce Markup" tab displays the following Apex code:

```
<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	<input type="text" value="Survey"/>
Site Name	<input type="text" value="Survey"/>
Site Description	<div style="border: 1px solid black; height: 100px; width: 100%;"></div>
Site Contact	<input type="text" value="Rakesh Gupta"/>
Default Record Owner	<input type="text" value="Rakesh Gupta"/>
Default Web Address	<input type="text" value="http://katihar-developer-edition.gus.force.com/ survey"/>
Active	<input checked="" type="checkbox"/>
Active Site Home Page	<input type="text" value="Survey"/> [Preview]
Inactive Site Home Page	<input type="text" value="InMaintenance"/> [Preview]
Site Template	<input type="text" value="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	<input type="text" value="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"/>

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.