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Salesforce Developer(Course)
Assignment no 1

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Year & Dep : IV year & CSE

Batch : 2024

Zone no : Zone 8

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled 'Search Setup'. Below it, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Child'. On the left, a sidebar lists various setup options: 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, and Validation Rules. The 'Details' section is selected, showing the 'Custom Object Definition Edit' page. This page has tabs for 'Save', 'Save & New', and 'Cancel'. It contains two main sections: 'Custom Object Information' and 'Enter Record Name Label and Format'. The 'Custom Object Information' section includes fields for 'Label' (Child), 'Plural Label' (Childs), 'Starts with vowel sound' (unchecked), 'Object Name' (Child), and 'Description'. It also has a 'Context-Sensitive Help Setting' with two options: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page' (unchecked). The 'Enter Record Name Label and Format' section includes a 'Record Name' field (Child Name) and a 'Data Type' dropdown (Text).

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 datatype.








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.



Search Setup



SetupHomeObject 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


Fields & Relationships

4 Items, Sorted by Field Label








Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

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



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Parent

Details

Fields & Relationships

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Buttons, Links, and Actions

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Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Parent

New Custom Field

Help for this Page

Step 1: Choose the field type

NextCancel

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

Data Type

Select one of the data types below.

☐ None Selected

☐ Auto Number

☐ Formula

☐ Roll-Up Summary

☐ Lookup Relationship

☒ Master-Detail Relationship

☐ External Lookup Relationship

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

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.

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.


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.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:








- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Parent

Details

Fields & Relationships

Page Layouts

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Buttons, Links, and Actions

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Object Limits

Record Types

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Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Parent

New Relationship

Help for this Page

Step 2. Choose the related object


Step 2 of 6

PreviousNextCancel








Select the other object to which this object is related.

Related ToChild

PreviousNextCancel



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Child

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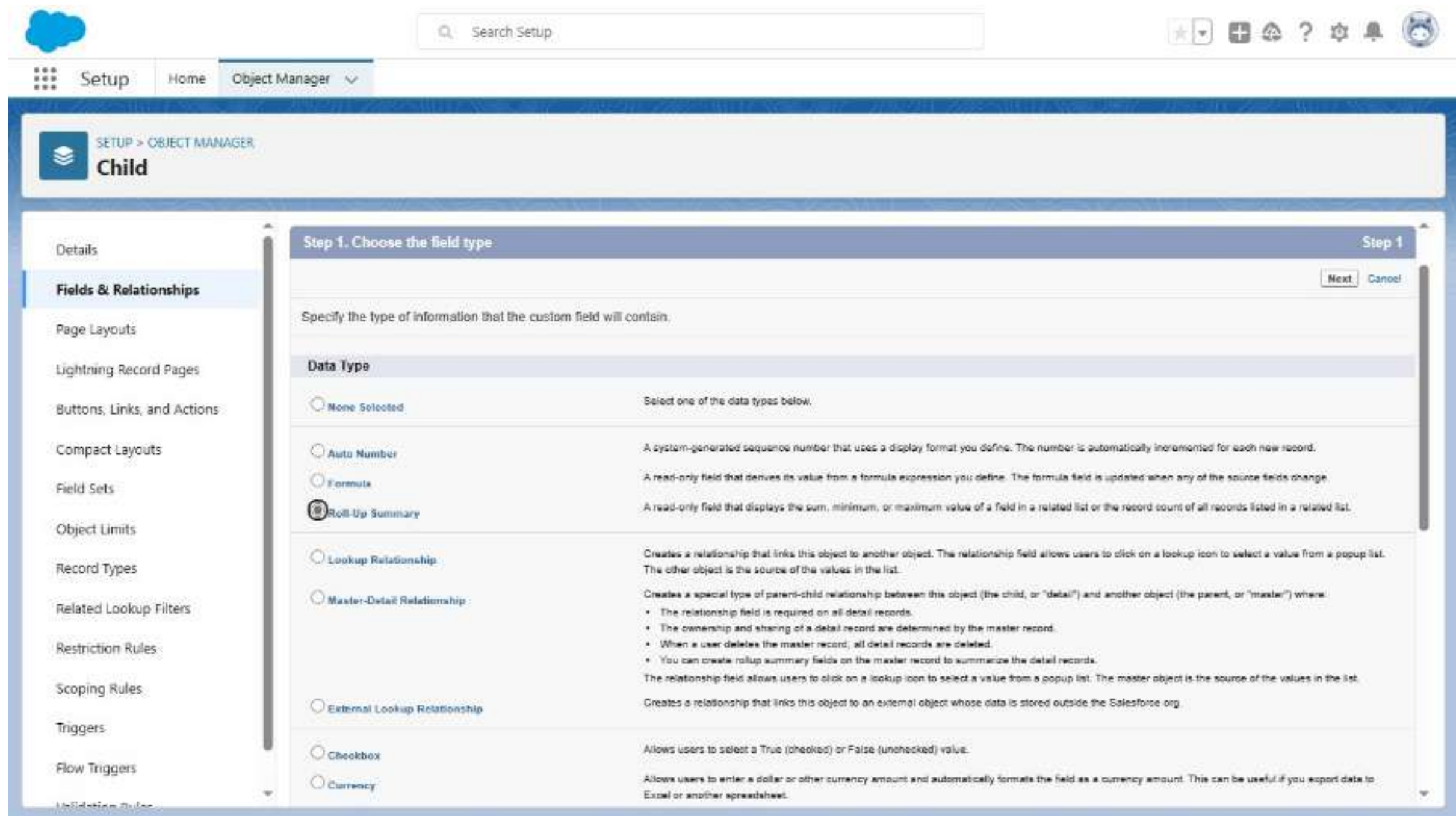
Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

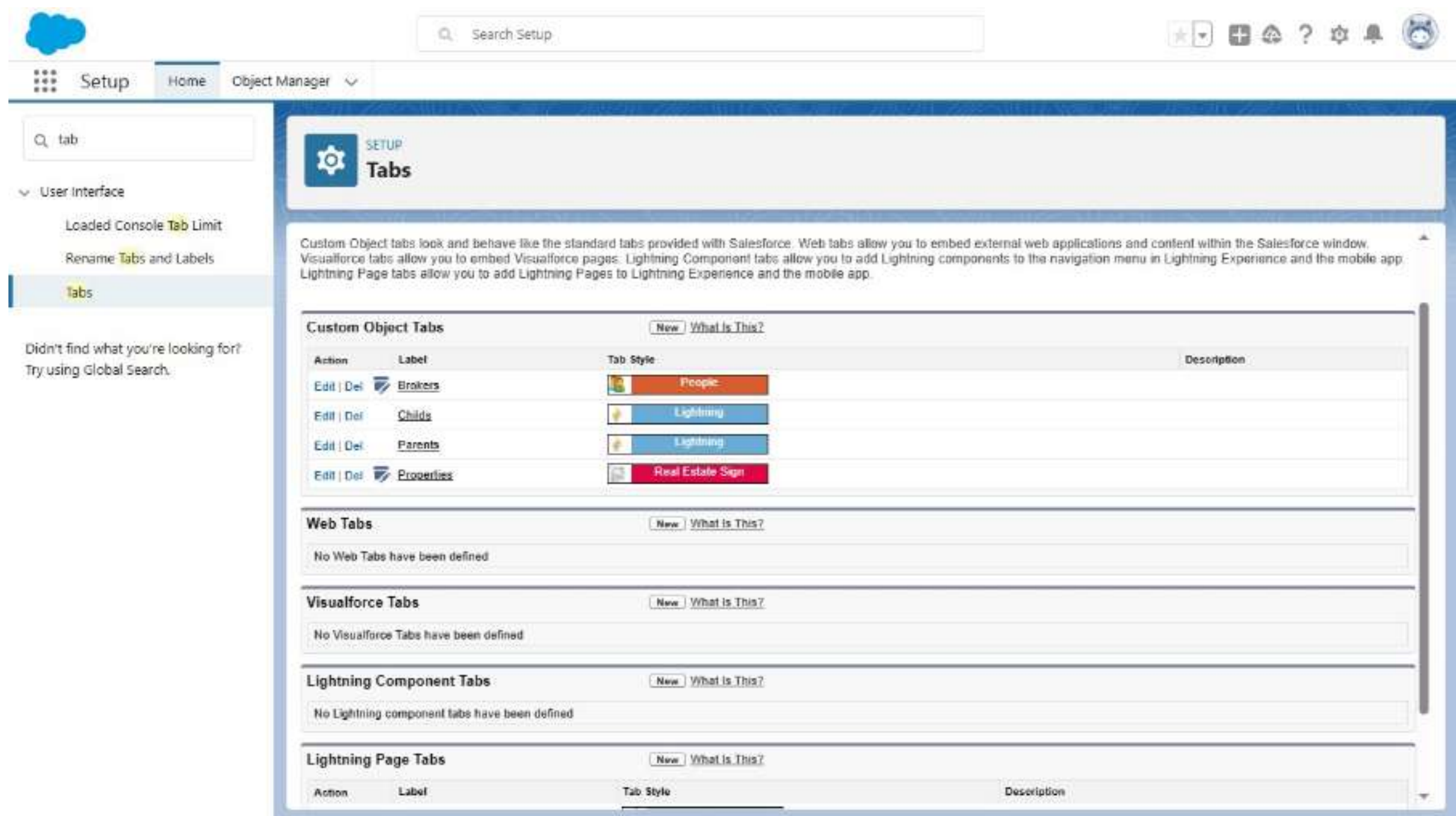
NewDeleted FieldsField DependenciesSet History Tracking

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)		



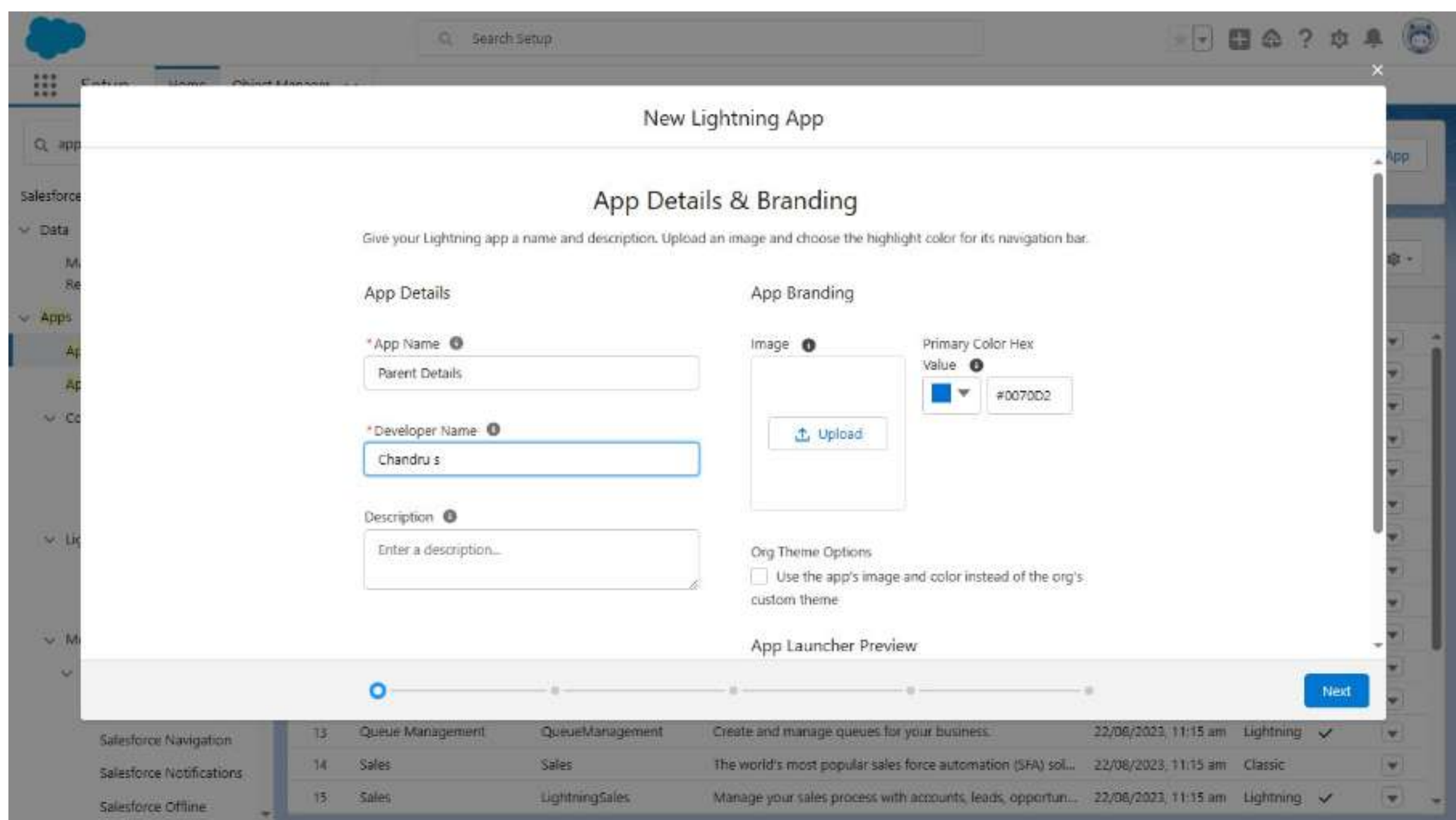
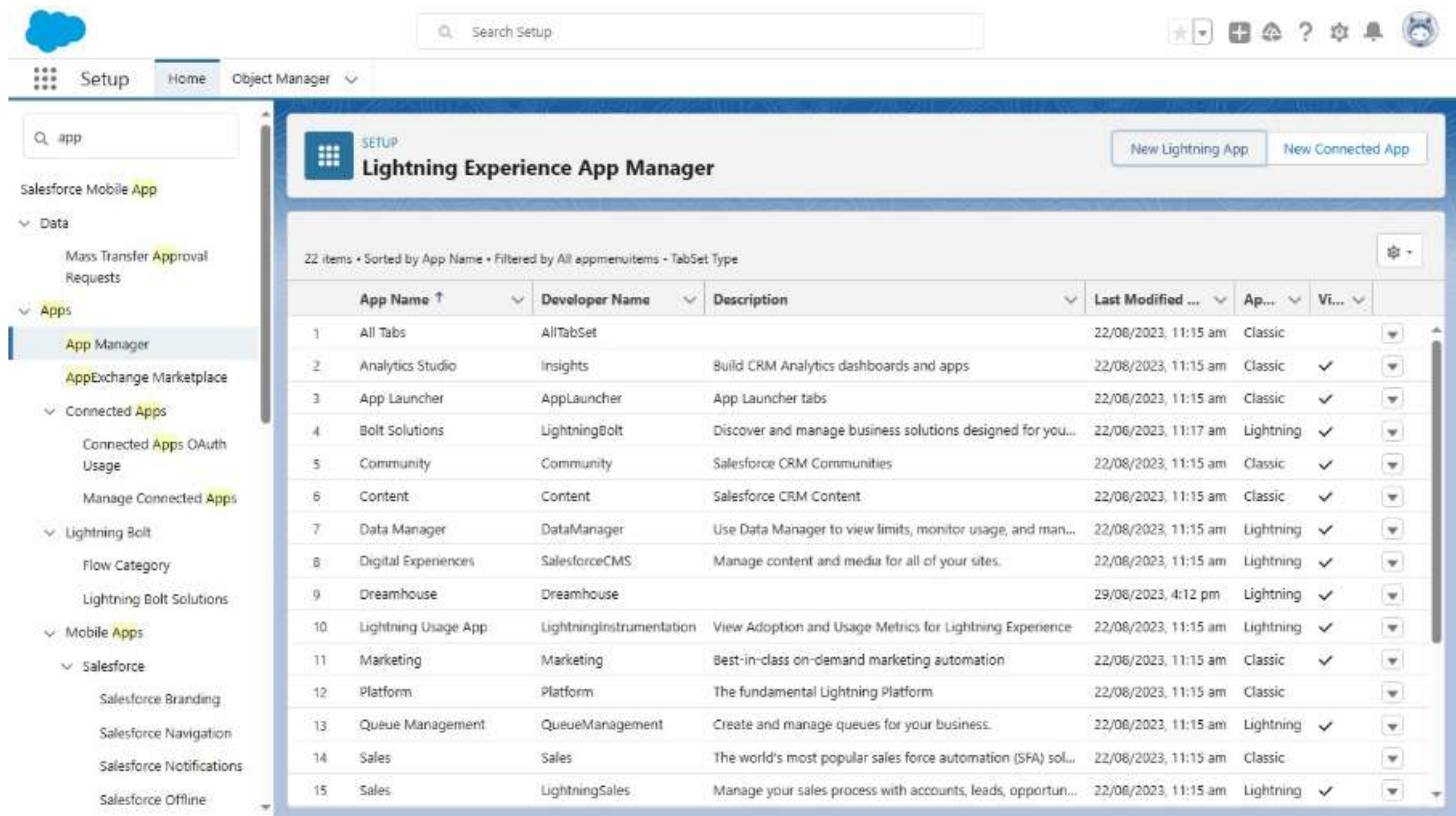
Step 3: Create a Roll-Up Summary Field

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.



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

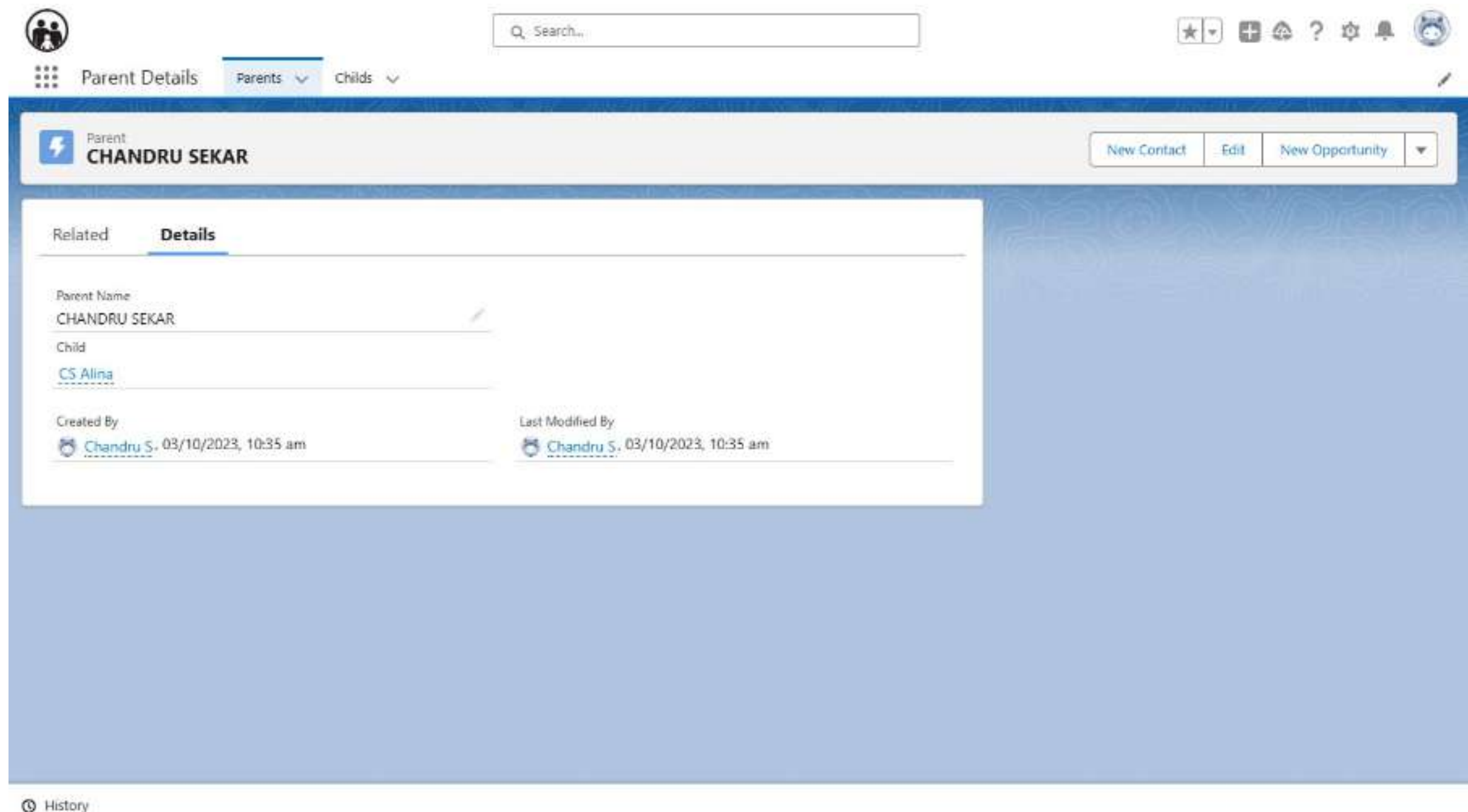
Depending on your use case, you may want to update page layouts and record types to make sure the new relationship and fields are displayed correctly to your users.



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

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

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



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

Step 1: Create a Public Group

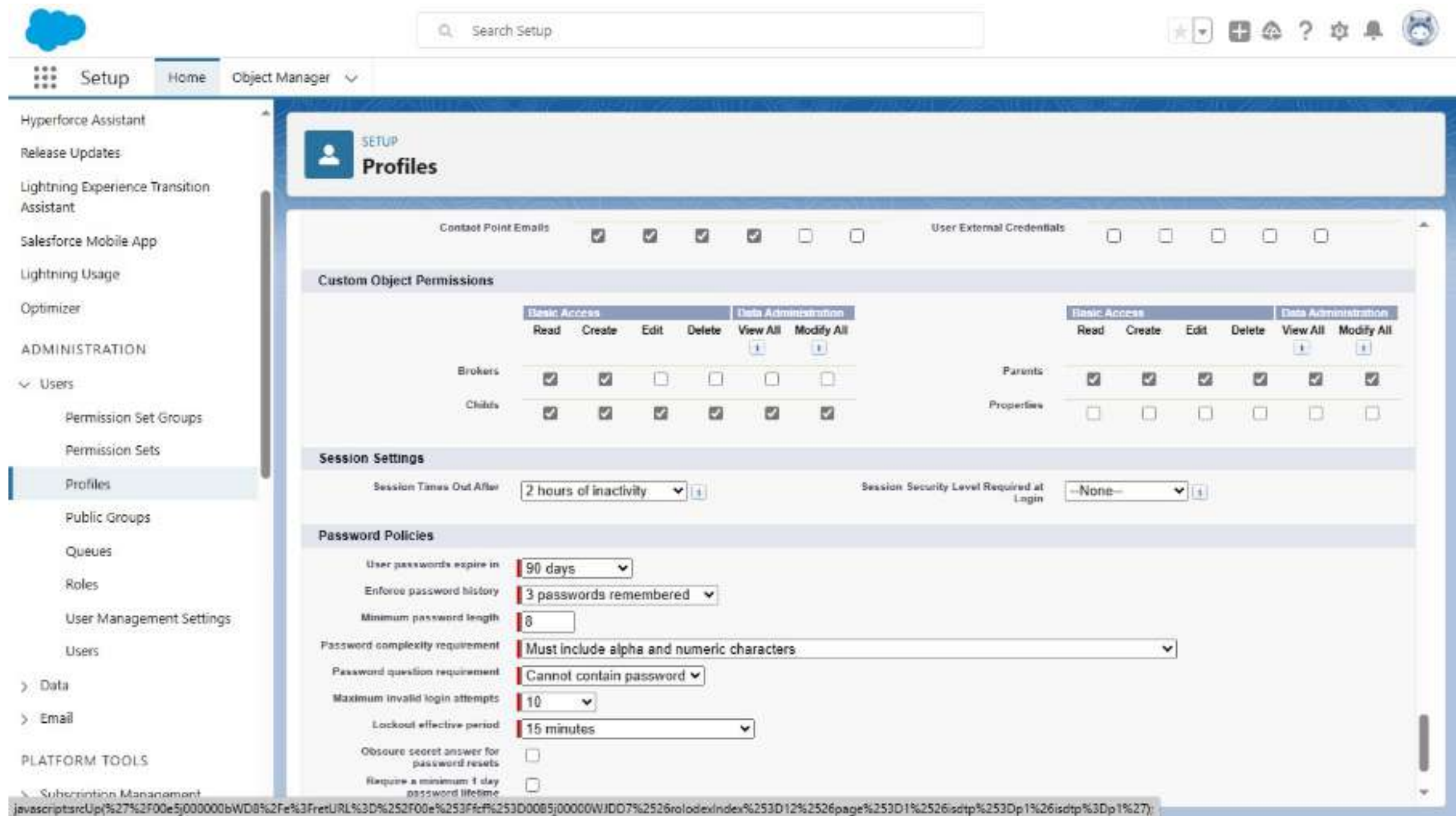
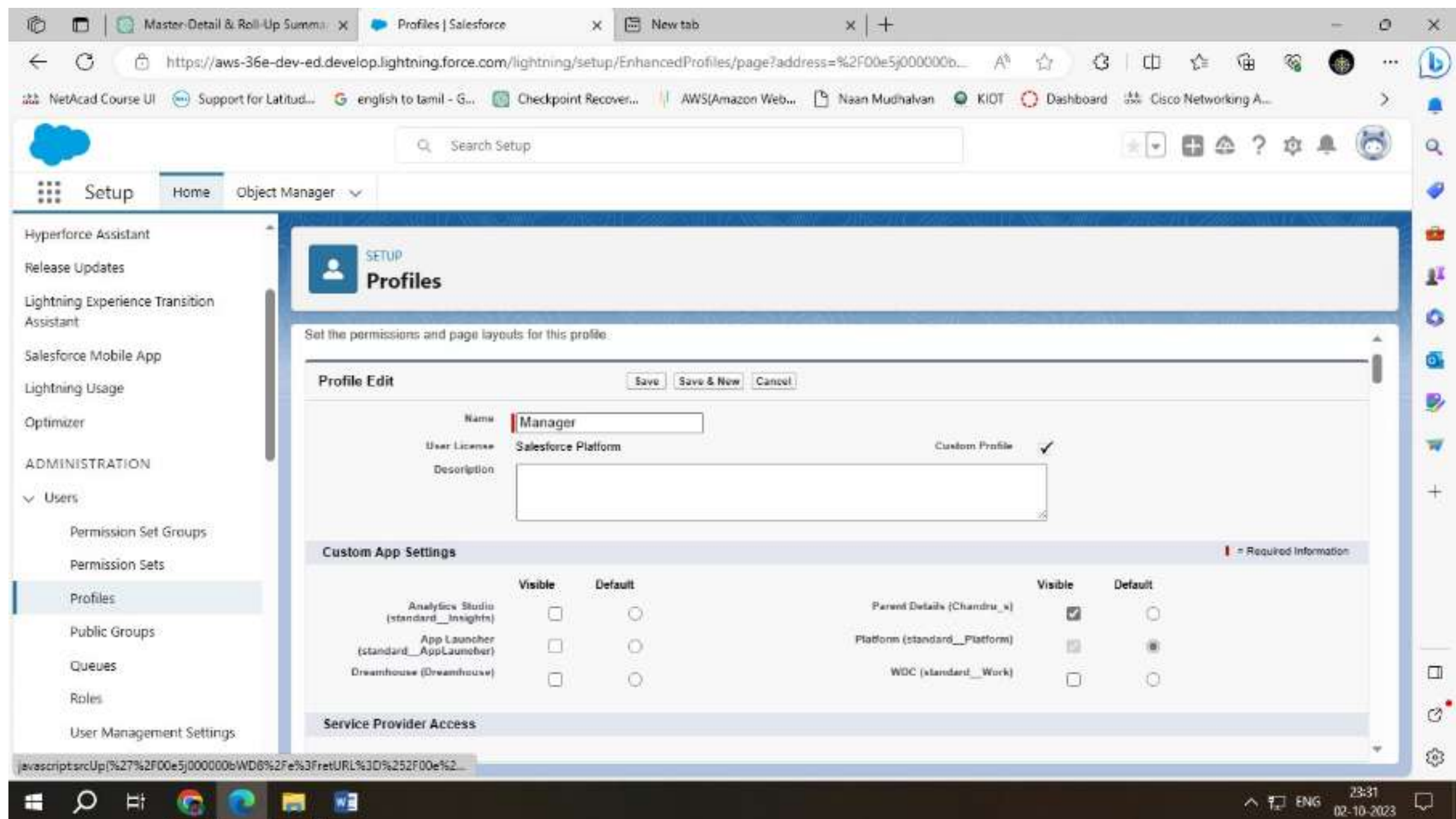
1. Go to "Setup" in Salesforce.

2. In the Quick Find box, type "Public Groups" and select it.

3. Click on "New Public Group."

4. Create a group for User A, let's call it "UserA_Group," and add User A to this group.

5. Create another group for User B, let's call it "UserB_Group," and add User B to this group.



Step 2: Create Criteria-Based Sharing Rules

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

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

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

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

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

6. Save the sharing rule.

The screenshot shows the Salesforce Setup page with the 'Users' section selected in the left sidebar. The 'New User' form is displayed, showing fields for General Information and User License. The form is titled 'New User' and has a 'Help for this Page' link. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'User License' section includes fields for Role, User License, Profile, 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, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, and Load Lightning Pages While.

General Information

Field	Value
First Name	Sunil
Last Name	A
Alias	sa
Email	2k20cse176@kiet.ac.in
Username	2k21cse176@kiet.ac.in
Nickname	User169631476178576A936
Title	
Company	Male
Department	
Division	

User License

Field	Value
Role	<None Specified>
User License	Salesforce Platform
Profile	Manager
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 Addition 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"/>

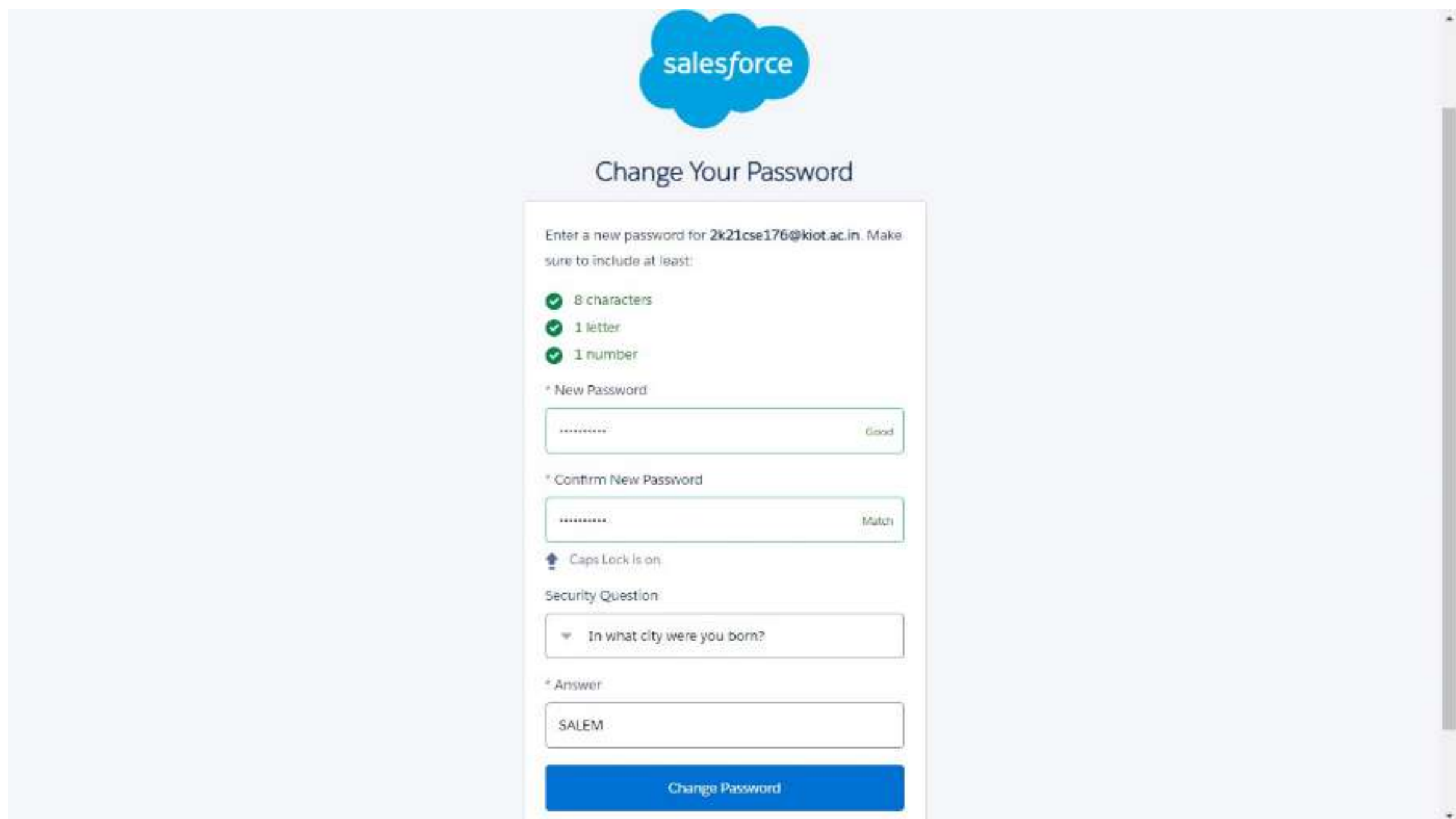
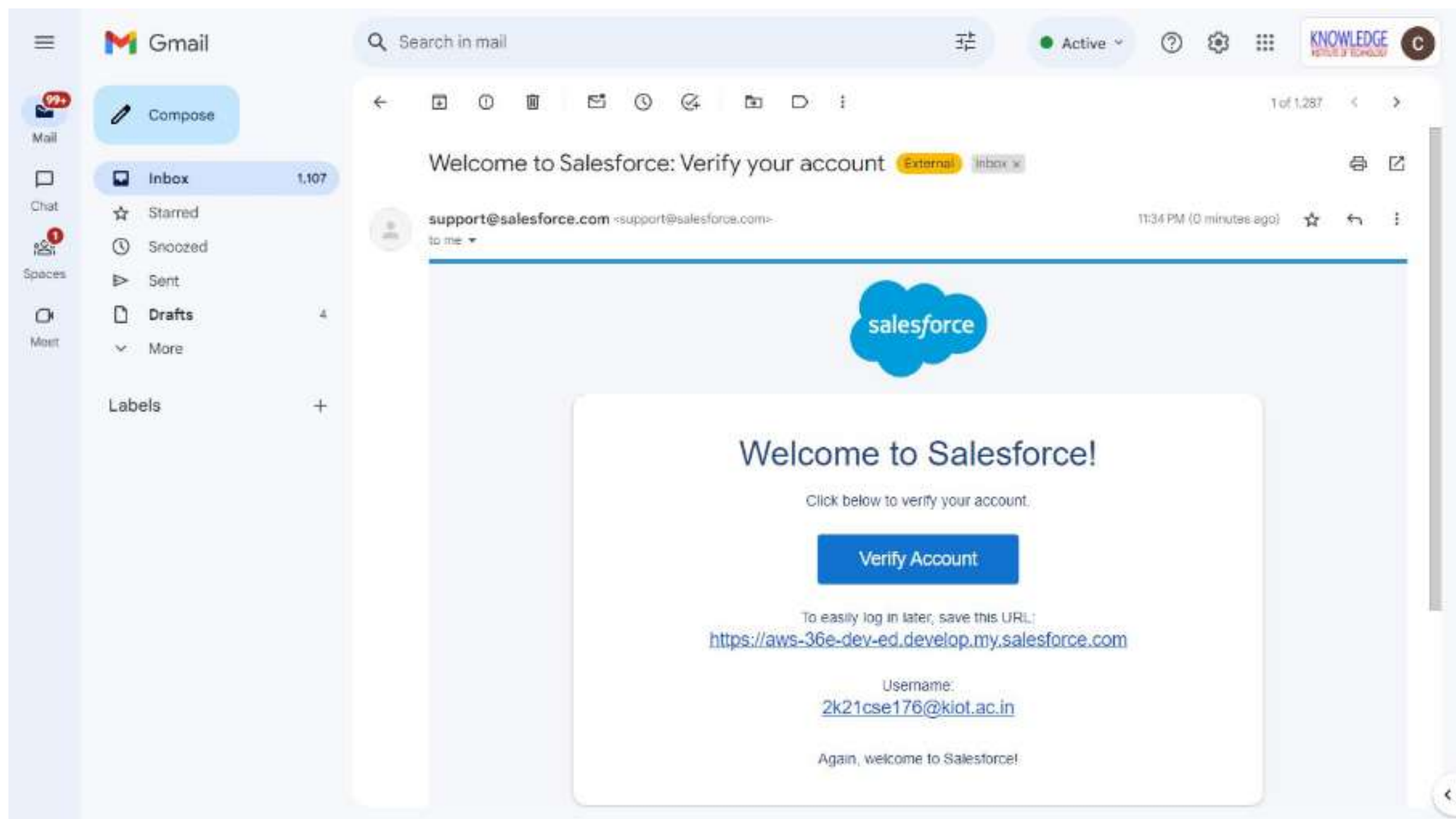
The screenshot shows the Salesforce Setup page with the 'Users' section selected in the left sidebar. The 'User Detail' page for 'Sunil A' is displayed, showing fields for User Detail and User License. The page is titled 'User Sunil A' and has a 'User Profile Help for this Page' link. The 'User Detail' section includes 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 'User License' section includes fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts.

User Detail

Field	Value
Name	Sunil A
Alias	sa
Email	2k20cse176@kiet.ac.in
Username	2k21cse176@kiet.ac.in
Nickname	User169631476178576A936
Title	
Company	Male
Department	
Division	
Address	2/73 Kolankondal (p.o) Mallasamudram 637563 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
Federation ID	

User License

Field	Value
Role	
User License	Salesforce Platform
Profile	Manager
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"/>
Mobile Push Registrations	View
Data.com User Type	
Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>



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
Public Groups
Queues
Roles
User Management Settings
Users

DATA
Data
Email

PLATFORM TOOLS
Subscription Management

SETUP Profiles

Profile Edit: **Bmanager** Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name: **Bmanager**
User License: **Salesforce Platform**
Custom Profile: ☒
Description:

Custom App Settings ! = Required Information

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>	Parent Details (Chandru_s)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Dreamhouse (Dreamhouse)	<input type="checkbox"/>	<input 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** Learning **Default On**

SETUP Profiles

Contacts

	Read	Create	Edit	Delete	View All	Modify All
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Push Topics

	Read	Create	Edit	Delete	View All	Modify All
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Session Settings

Session Times Out After: **2 hours of inactivity** ! Session Security Level Required at Login: **None** !

Password Policies

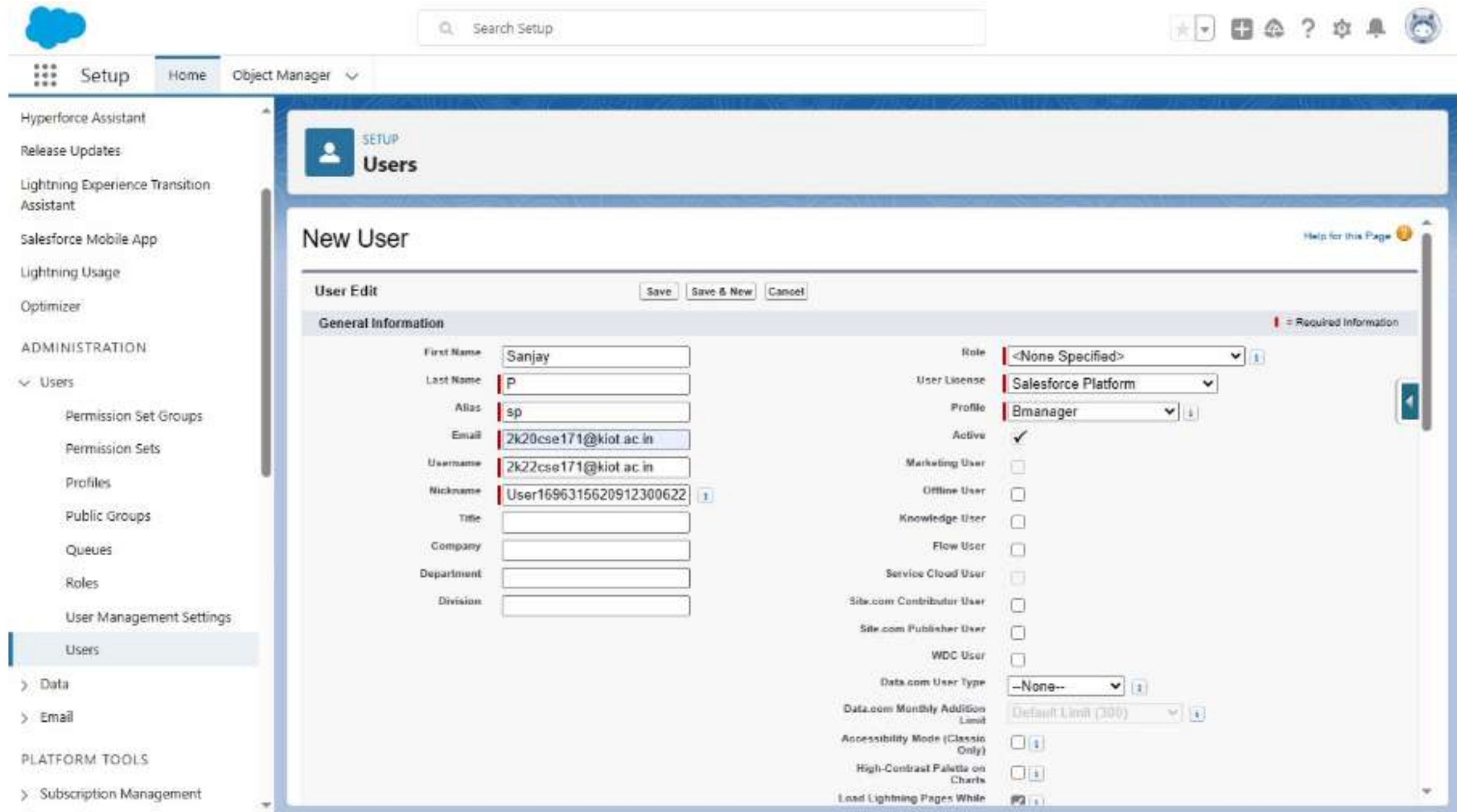
User passwords expire in: **90 days**
 Enforce password history: **3 passwords remembered**
 Minimum password length: **8**
 Password complexity requirement: **Must include alpha and numeric characters**
 Password question requirement: **Cannot contain password**
 Maximum invalid login attempts: **10**

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."

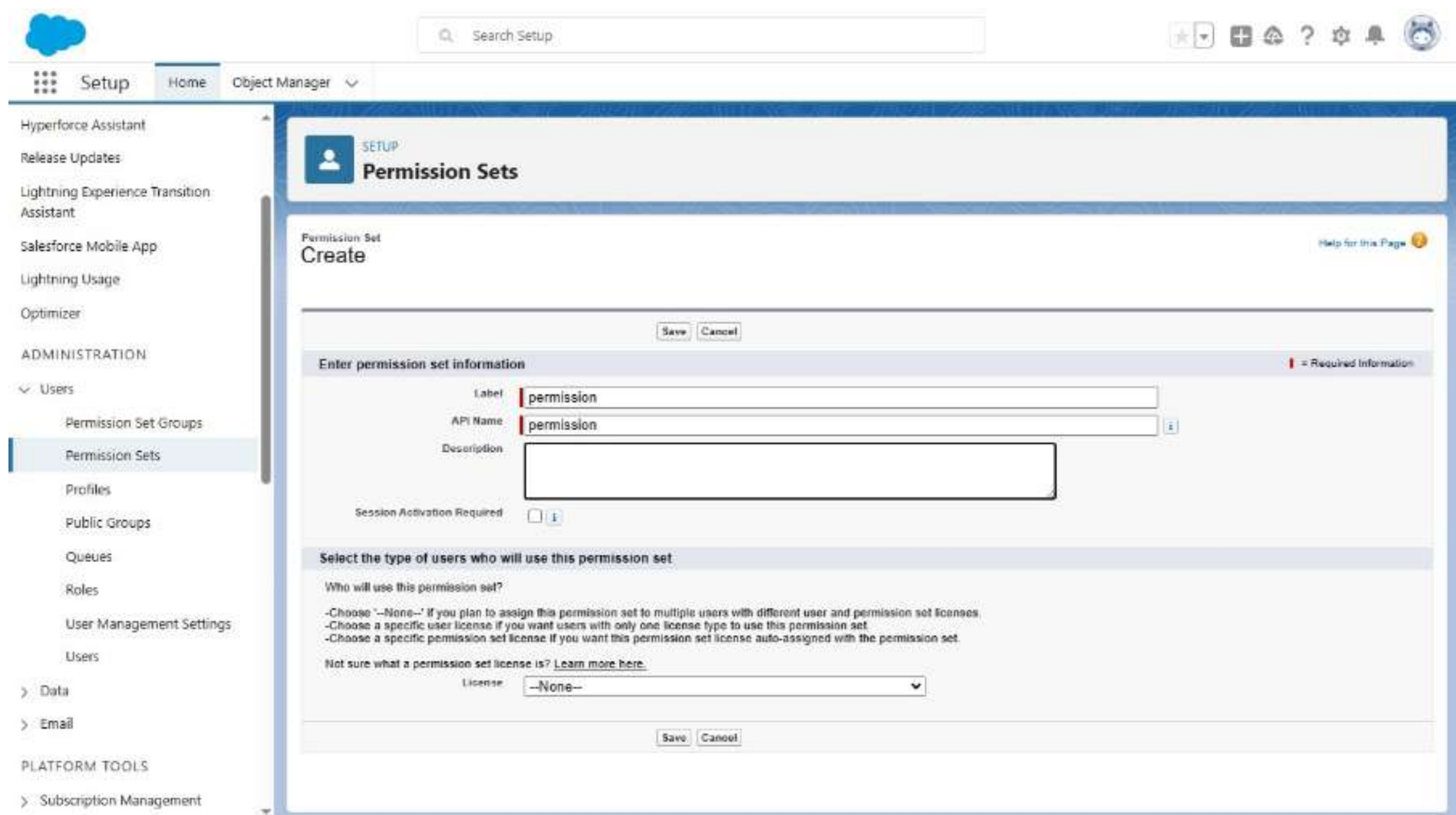
3. Define the criteria based on which records should be shared.

4. Save the sharing rule.



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users (selected), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Data, Email, PLATFORM TOOLS, and Subscription Management. The main content area is titled 'New User' and contains a 'User Edit' form. The form has two columns of fields. The left column includes First Name (Sanjay), Last Name (P), Alias (sp), Email (2k20cse171@kiot.ac.in), Username (2k20cse171@kiot.ac.in), Nickname (User1696315620912300622), Title, Company, Department, and Division. The right column includes Role (<None Specified>), User License (Salesforce Platform), Profile (Bmanager), Active (checked), 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 Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, and Load Lightning Pages While. There are 'Save', 'Save & New', and 'Cancel' buttons at the top of the form.

Step 3: Assign Records Ownership



The screenshot shows the Salesforce Setup interface. The left sidebar is the same as the previous screenshot. The main content area is titled 'Permission Sets' and contains a 'Create' form. The form has a 'Save' and 'Cancel' button at the top. Below the button is a section titled 'Enter permission set information' with fields for Label (permission), API Name (permission), and Description. There is also a checkbox for 'Session Activation Required'. Below this is a section titled 'Select the type of users who will use this permission set' with a dropdown menu for 'License' set to '-None--'. There are 'Save' and 'Cancel' buttons at the bottom of the form.

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SETUP

Permission Sets

Permission Set

permission

Find Settings

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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 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	--

javascriptsrcSelf"%2F0P55j000007UxoI%3Fs%3DEntityPermissions%26o%3DApiA...

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Childs

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Cancel

Tab Settings

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

javascriptsrcUpI"%2F0P55j000007UxoI%2Fe%3Fs%3DEntityPermissions%26o%3D0115j000002r5b%26isdp%3Dp1%

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PERMISSION SET PERMISSION MANAGE ASSIGNMENT EXPIRATION

permission

Select Users to Assign

All Users

1 item selected

Search this list

Full Name

AI...

Username

R...

A...

Profile

☐

Chandru SCSau611220104303@naanmudhalvan.com

☒

System Administrator

☐

Chatter ExpertChatterchatty.00d5j00000cismqean.eodfzlkbsrf@chatter.salesforce.com

☒

Chatter Free User

☐

Integration Userintegintegration@00d5j00000cismqean.com

☒

Analytics Cloud Integration User

☐

Sanjay Psp2k22cse171@kiotac.in

☒

Bmanager

☐

Security Usersecinsightsecurity@00d5j00000cismqean.com

☒

Analytics Cloud Security User

☒

Sunil Asa2k21cse176@kiotac.in

☒

Manager

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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

Manager

☒

Salesforce Platform

Never Expires

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Search Setup

1 assignments were successful.

permission

Assignment Summary

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

Done

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Permission Sets

Operating Hours Modules	--	7	--
Opportunities	No Access	26	--
Opportunity Contact Role	--	6	--
Opportunity Product	--	14	--
Order Products	--	15	--
Orders	No Access	33	--
Parents	No Access	4	--
Party Consents	No Access	18	--
Payment Authorization Adjustments	No Access	24	--
Payment Authorizations	No Access	30	--
Payment Gateway Logs	No Access	--	--
Payment Gateways	No Access	6	--
Payment Groups	No Access	1	--
Payment Line Invoices	No Access	20	--
Payments	No Access	41	--
Pending Order Summaries	No Access	--	--
Pending Order Summary Processed Events	No Access	--	--
Price Book Entries	--	9	--
Price Books	No Access	6	--
Privacy Consents	No Access	--	--
Problem Related Items	--	10	--
Problems	No Access	21	--
Process Cart Pricing Events	No Access	--	--
Process Cart Pricing Response Events	No Access	--	--
Process Exceptions	No Access	12	--
Product Attributes	--	3	--
Product Attribute Set Products	--	2	--

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Permission Sets

permission

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview > Object Settings > Parents

Parents Save Cancel

Tab Settings

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

Object Permissions

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

Field Permissions

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

https://aws-36e-dev-ed.develop.my.salesforce.com/one/one.app#/a/ohaRedirect/0P55j000007Uxoi/e?s=EntityPermissions&lo=0115j000002n5H&isdtp=p1

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Search Setup

permission

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

Select Users to Assign

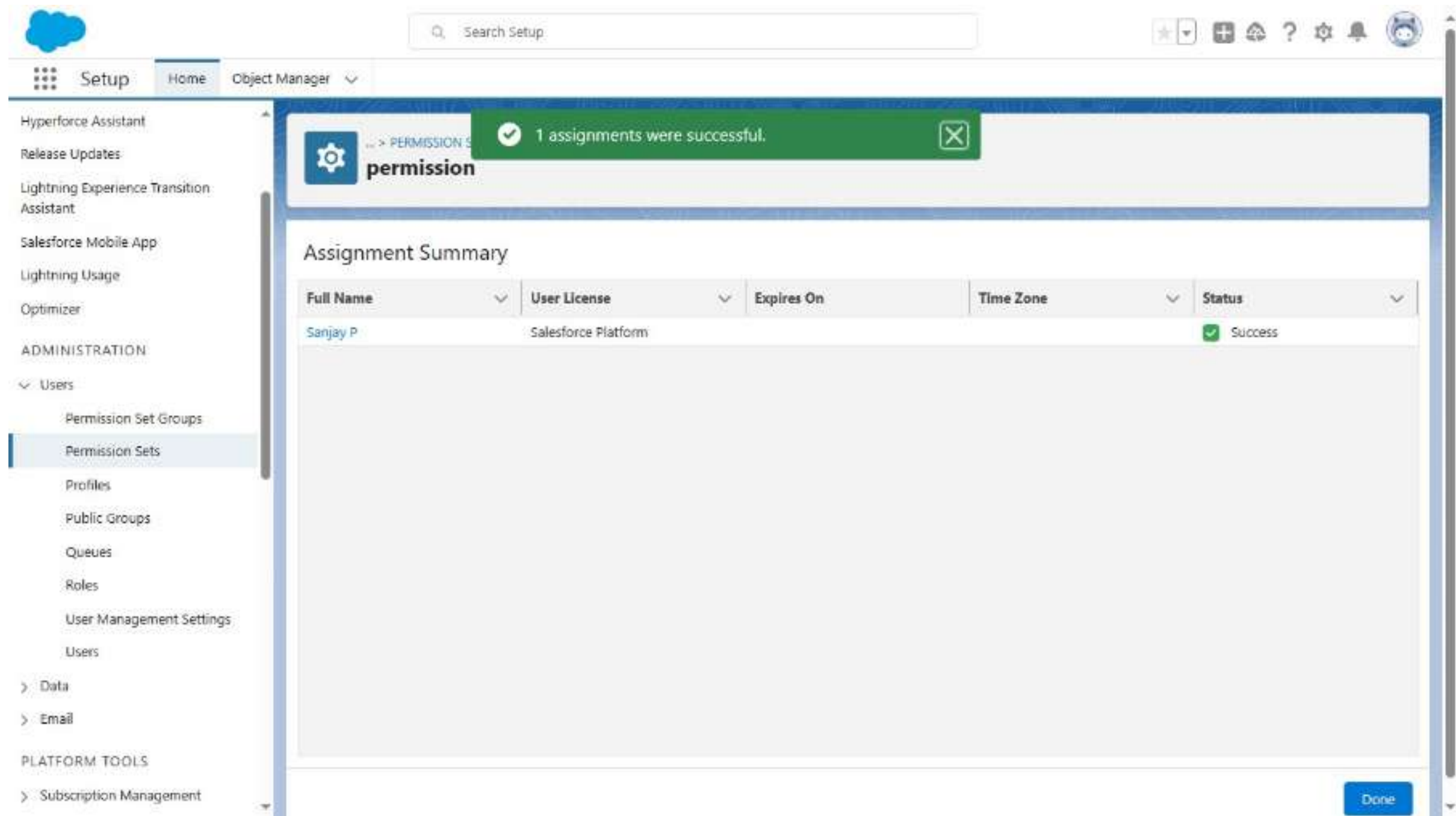
All Users

1 item selected

Search this list...

	Full Name	All...	Username	Role	Ac...	Profile
<input type="checkbox"/>	Chandru S	CS	au611220104903@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzikibsr@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000cismqean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	Sanjay P	sp	2k22cse171@kiot.ac.in		<input checked="" type="checkbox"/>	Bmanager
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000cismqean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next



3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Step 1: Create a Permission Set for Delete Access

1. Go to "Setup" in Salesforce.

2. In the Quick Find box, type "Permission Sets" and select it.

3. Click "New Permission Set" to create a new one.

4. Give the permission set a name (e.g., "Delete Access Permission Set").

5. In the "System Permissions" section, find and enable the "Delete" permission for the "Account" object.

6. Save the permission set.

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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

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/>	Action	Full Name +	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	A. Sunil	sa	2621cse178@kiol.ac.in		✓	Manager
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty00d5j00000cismqean_eodf@kibart@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	P. Sanjay	sr	2622cse171@kiol.ac.in		✓	Bmanager
<input type="checkbox"/>	Edit	S. Chandru	CS	au611220104303@naanmudhalvan.com		✓	System Administrator
<input type="checkbox"/>	Edit	User Integration	inteo	integration@00d5j00000cismqean.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User Security	asec	insyhtsecurity@00d5j00000cismqean.com		✓	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with categories like Lightning Usage, ADMINISTRATION, PLATFORM TOOLS, and more. The main area displays the 'Profiles' page under the 'Users' section. At the top of the main area, there's a search bar and utility icons. Below that, the 'Profiles' header includes a user icon, the word 'SETUP', and the title 'Profiles'. A toolbar offers options like 'All Profiles', 'Edit', 'Delete', and 'Create New View'. A secondary toolbar contains 'New Profile', a filter icon, and an alphabetical index (A-Z). The core of the page is a table listing various profiles, each with an 'Action' column (containing 'Edit' and 'Clone' links), a 'Profile Name' column, a 'User License' column, and a 'Custom' checkbox.

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 Users	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"/>

At the bottom of the table, it indicates '1-25 of 41' items and '0 Selected'. The footer shows the URL 'https://www-36e-dev-ed.develop.lightning.force.com/one/one.app#/setup/enhancedProfiles/home' and page information 'Page 1 of 2'.

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Profiles

Clone Profile

Help for this Page

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

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Profile

chan

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login (P.Rapex) | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Edit

Clone

Delete

View Users

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

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Order	Order Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Order Product	Order Product Layout [View Assignment]
Account	Account Layout [View Assignment]	Payment	Payment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Payment Authorization	Payment Authorization Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Payment Authorization Adjustment	Payment Authorization Adjustment Layout [View Assignment]
Asset	Asset Layout	Payment Gateway	Payment Gateway Layout

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Profiles

	Basic Access				Data Administration	
	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"/>
Childs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
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

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Profiles

Profile Edit

chan

Set the permissions and page layouts for this profile.

Save Save & New Cancel

Name: chan

User License: Salesforce Platform

Description:

Custom Profile: ☒

Custom App Settings

	Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>
Dreamhouse (Dreamhouse)	<input type="checkbox"/>	<input type="radio"/>

	Visible	Default
Parent Details (Chandru_s)	<input checked="" type="checkbox"/>	<input type="radio"/>
Platform (standard__Platform)	<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

Learning Default On

Master-Detail & Roll-Up Summary

Users | Salesforce

New tab

https://aws-36e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

NetAcad Course UI | Support for Latitud... | english to tamil - G... | Checkpoint Recover... | AWS(Amazon Web... | Naan Mudhalvan | KIOT | Dashboard | Cisco Networking A... | Python Tutorial

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SETUP

Users

Help for this Page

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

New User | Reset Password(s) | Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A. Sunil	sa	2k21cse176@kiot.ac.in		✓	Manager
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty00d5000000cismoean.cedf@kiot.ac.in		✓	Chatter Free User
<input type="checkbox"/> Edit	P. Sanjay	sr	2k22cse171@kiot.ac.in		✓	Rmanager
<input type="checkbox"/> Edit	S. Chandru	CS	au611220104303@naanmudhalvan.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	inteo	integration@00d5000000cismoean.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d5000000cismoean.com		✓	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

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New User

User Edit

Save | Save & New | Cancel

General Information

First Name: Sunil

Last Name: A

Alias: sa

Email: 2k20cse176@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 Addition Limit: Default Limit (300)

Accessibility Mode (Classic Only): ☐

High-Contrast Palette on Charts: ☐

Load Lightning Pages While: ☒

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Permission Set Assignments: Activation Required

Permission Set Group Assignments

Permission Set License Assignments

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Third-Party Account Links

Installed Mobile Apps

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Name	Sunil A	Role	
Alias	sa	User License	Salesforce Platform
Email	2k20cse176@kiet.ac.in	Profile	chan
Username	2k20cse176@kiet.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User1696321490002329619	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	Male	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	2/73 Kolankondal(p.o) Mallasamudram 637563 Tamil Nadu India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	
Receive Approval Request Emails	Only if I am an approver	Debug Mode	
Federation ID		High-Contrast Palette on Objects	

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User Edit

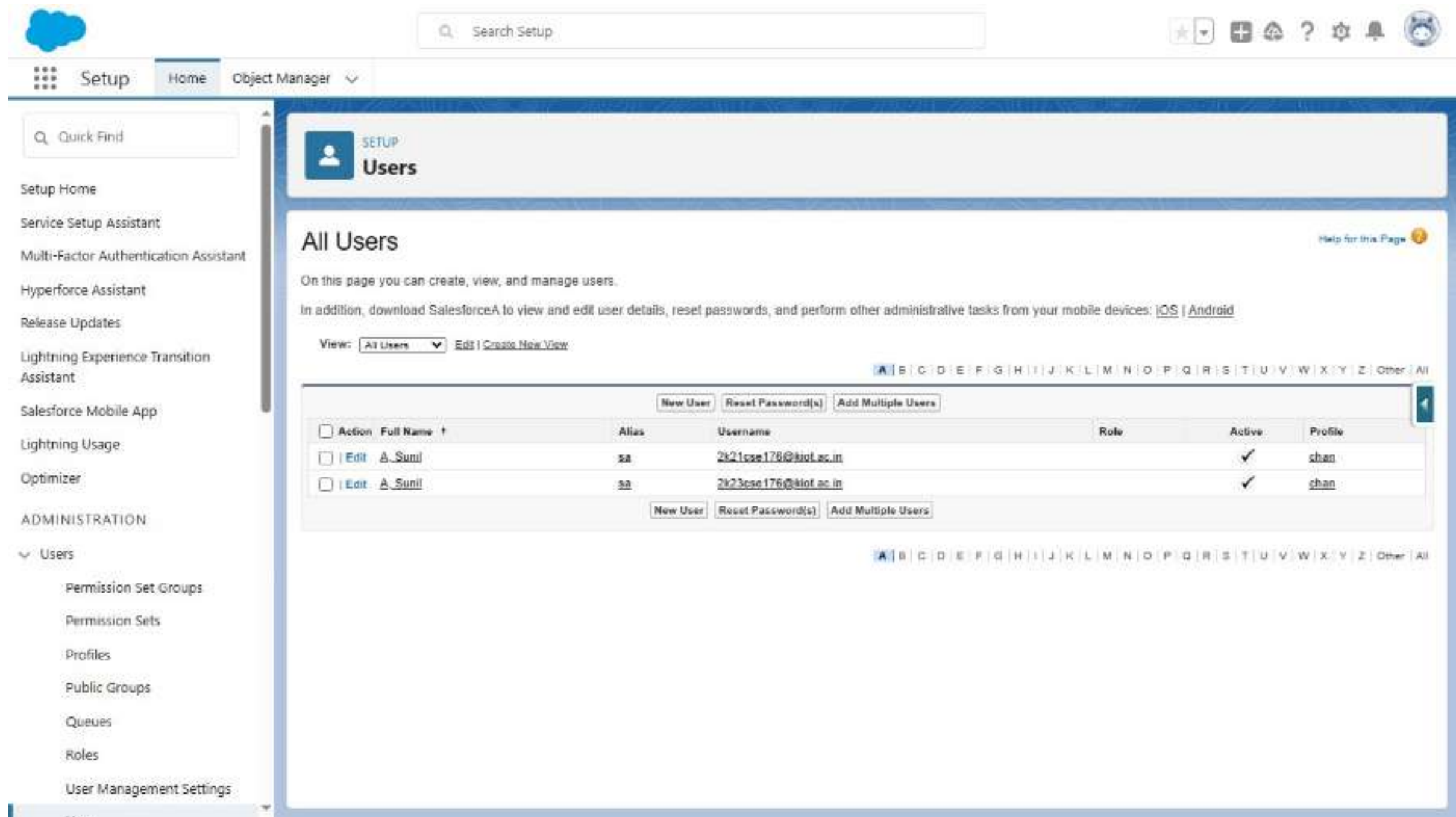
Save

Save & New

Cancel

General Information

= Required Information

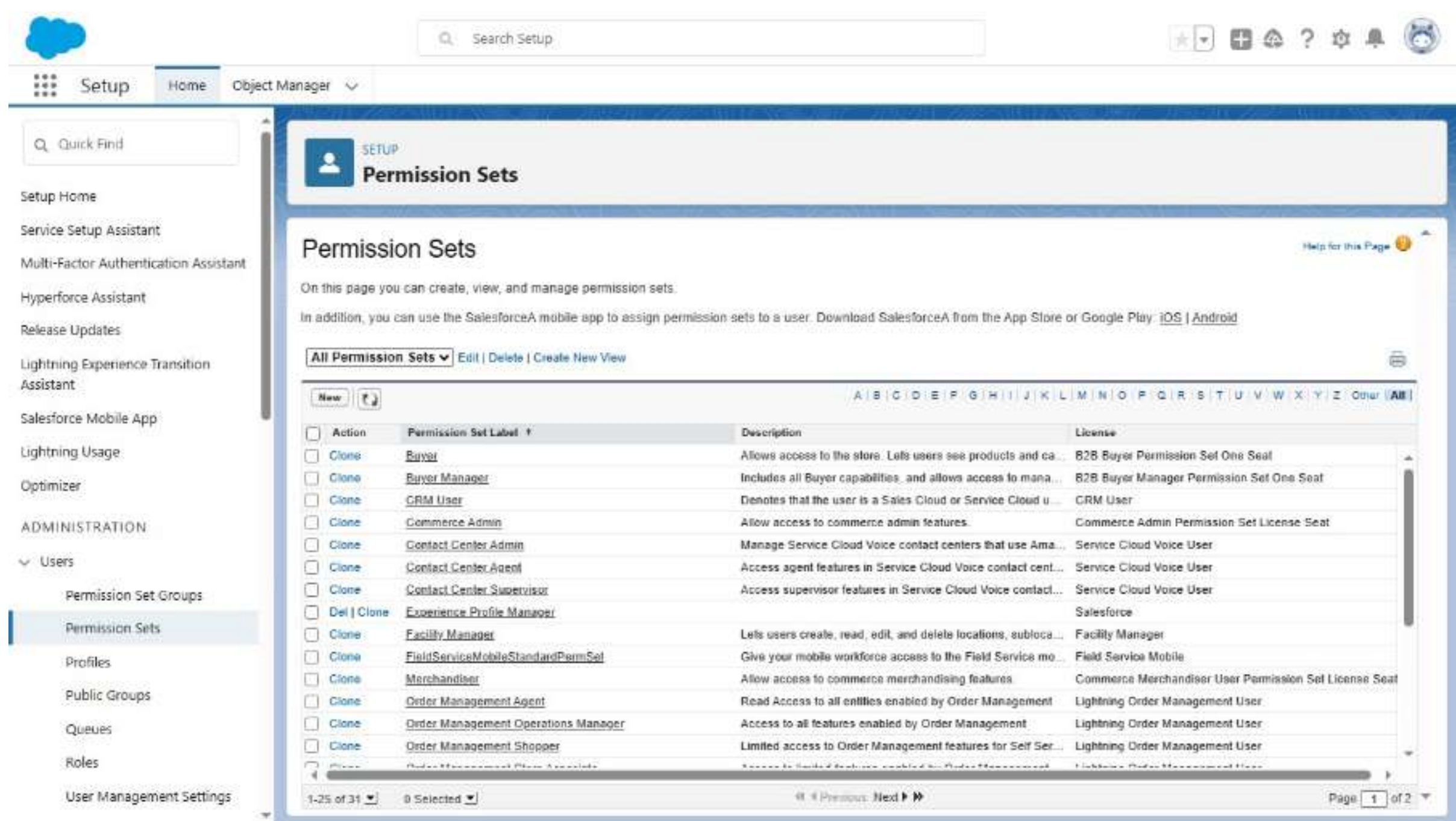


Step 2: Assign the Permission Set to the User Needing Delete Access

1. In the "Permission Set Detail" page, click on "Manage Assignments."

2. Click "Add Assignments" and select the user who needs delete access.

3. Save the assignment.



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permission01

Find Settings

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Delete

Edit Properties

Manage Assignments

Permission Set Overview

Description

License

Session Activation Required

Last Modified By

Chandru S. 03/10/2023, 1:59 pm

API Name

permission01

Namespace Prefix

Created By

Chandru S. 03/10/2023, 1:59 pm

Apps

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

External Data Source Access

Permissions to authenticate against external data sources

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

Edit Properties

Label

permission01

API Name

permission01

Description

Session Activation Required

Save

Cancel

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Permission Set Overview > Object Settings > Accounts

Accounts

Edit

Object Permissions

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

Field Permissions

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

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Find Settings...CloneDeleteEdit PropertiesManage Assignments

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AccountsEdit

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 type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

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

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All Users

2 items selected

Search this list...

Full Name

Alias

Username

Role

Account

Profile

<input type="checkbox"/>	Chandru S	CS	au611220104303@raanmudhalvan.com	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodtzikibsr1@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00d5j00000cismqean.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Sanjay P	sp	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>	Rmanager
<input type="checkbox"/>	Security User	sec	insightssecurity@00d5j00000cismqean.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input checked="" type="checkbox"/>	Sunil A	sa	2k21cse176@kiot.ac.in	<input checked="" type="checkbox"/>	chan
<input checked="" type="checkbox"/>	Sunil A	sa	2k23cse176@kiot.ac.in	<input checked="" type="checkbox"/>	chan

CancelNext

The screenshot shows the Salesforce Setup interface. On the left, the 'Users' menu is expanded, and 'Permission Sets' is selected. The main content area displays the 'Selected Users' table for assigning a permission set.

Selected Users Table:

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 top of the main content area, there are options for 'No expiration date' (selected) and 'Specify the expiration date' (with buttons for 1 Day, 1 Week, 30 Days, 90 Days, and Custom Date). A 'Time Zone' dropdown menu is also present.

At the bottom of the main content area, there are 'Cancel', 'Back', and 'Assign' buttons.

The screenshot shows the Salesforce Setup interface after assigning a permission set. A green banner at the top indicates '2 assignments were successful.' The main content area displays the 'Assignment Summary' table.

Assignment Summary Table:

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

At the bottom right of the main content area, there 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.
- 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

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

Validation Rules

Fields & Relationships

Quick Find

8 Items, Sorted by Name

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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		
Survey Result Name	Name	Auto Number		✓

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. Click 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

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

Save

Save & New

Cancel

Edit Email Alert

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: Find

Recipients

Available Recipients

User: Integration User
User: Rakesh Gupta
User: Security User

Add

Remove

Selected Recipients

Email Field: Email

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

Additional Emails

From Email Address

Current User's email address

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

Save

Save & New

Cancel

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

1. Click Setup.

2. In the Quick Find box, type Flows.

3. Select Flows then click on the New Flow.

4. Select the Screen Flow option and click on Next and configure the flow as follows:

5. How do you want to start building: Freeform

6. We will use the Screen element to capture a Survey response form. Drag and drop a Screen element onto the canvas.

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

1. Drag-and-drop the Create Records element onto the Flow designer. 2. Enter a name in the Label (Save Response) field; the API Name will auto-populate.

3. For How Many Records to Create – select one.

4. For How to Set the Record Fields – select Use separate resources, and literal values.

5. Select the Survey_Result__c object from the dropdown list.

6. Set Field Values for the Survey Result

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row 3:

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

Save Response

* API Name

Save_Response

Description

How Many Records to Create

☒ One

☐ Multiple

How to Set the Record Fields

☐ Use all values from a record

☒ Use separate resources, and literal values

Create a Record of This Object

* Object

Survey Result

Set Field Values for the Survey Result

Field

Comment__c

Value

←

Ad Comment

 ×

Field

Email__c

Value

←

Ad Email > Value

 ×

Field

Name__c

Value

← (!Name.firstName) (!Name.lastName)

Field

Rating__c

Value

←

Ad Rating

 ×

+ Add Field

☐ Manually assign variables

Cancel

Done

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

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

Edit "Survey - Thank You Email" email alert

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

* Label

Send Thank You Email

* API Name

Send_Thank_You_Email

Description

Set Input Values

A₃

* Record ID

{!Save_Response}

Cancel

Done

Save as

A New Version
A New Flow

* Flow Label

* Flow API Name

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.

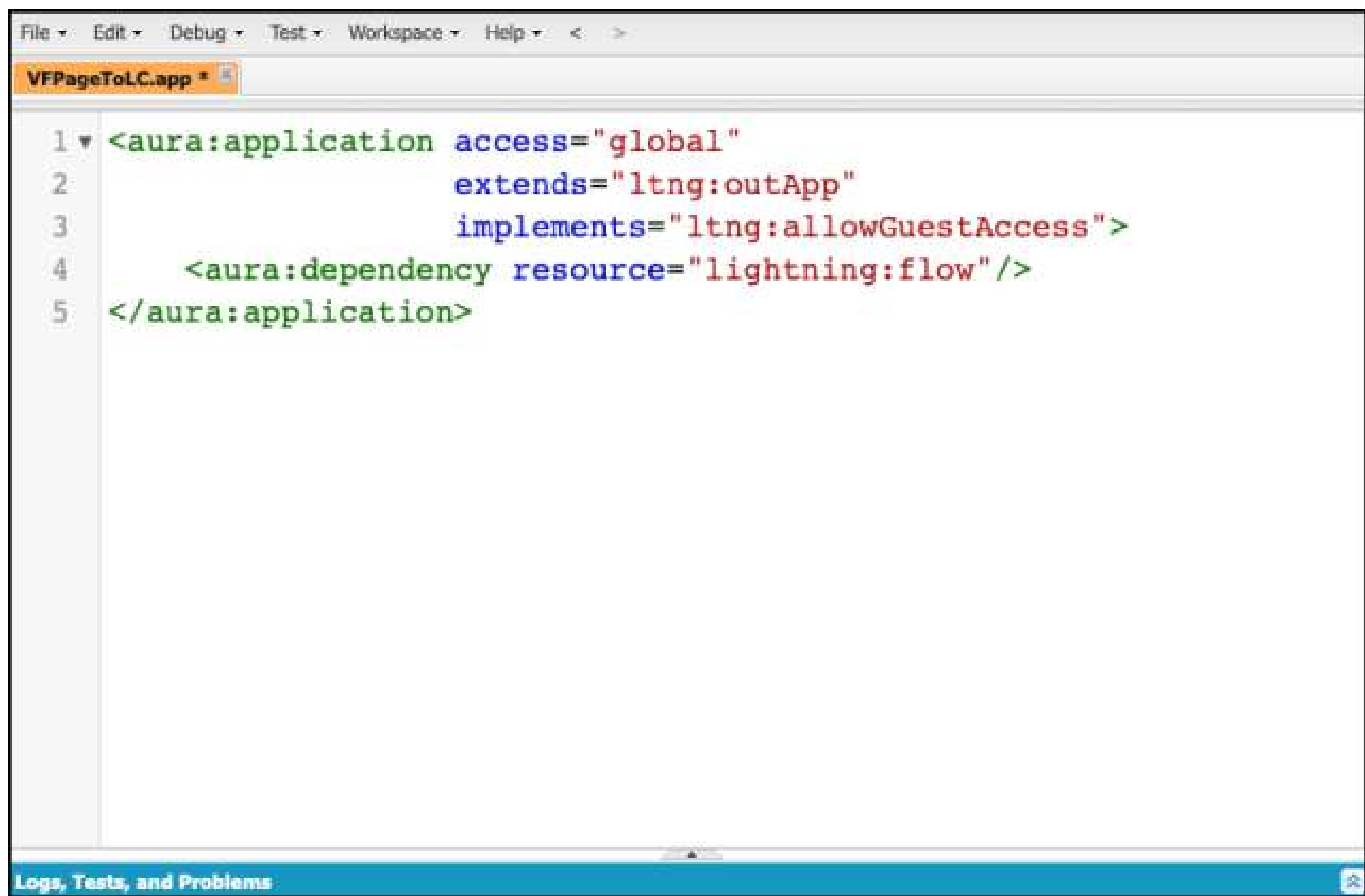
1. Click Setup | Developer Console

2. Navigate to File | New | Lightning Application

3. Enter a Name (VFPageTLC) 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.



Visualforce Page
Survey Help for this Page

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

Page Information Required Information

Label

Name

Description

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

Require CSRF protection on GET requests ☐

Visualforce Markup Version Settings

```

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       };
22       $Lightning.use("c:VFPageToLC", function() {
23         $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
24           "flowContainer",
25           function (component) {
26             component.startFlow("Survey", );
27           }
28         );
29       });
30     </script>
31   </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. Click on the New button.

4. Fill the details as per the screenshot below:

5. Click Save.

Site Edit

Save

Cancel

Site Label

Survey

i

Site Name

Survey

i

Site Description

Site Contact

Rakesh Gupta

i

Default Record Owner

Rakesh Gupta

i

Default Web Address

http://katihar-developer-edition.gus.force.com/

survey

i

Active

☒

i

Active Site Home Page

Survey

[Preview]

Inactive Site Home Page

InMaintenance

[Preview]

Site Template

SiteTemplate

i

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

i

URL Rewriter Class

i

Enable Feeds

☐

Clickjack Protection Level

Allow framing by the same origin only (Recommended)

i

Require Secure Connections (HTTPS)

☒

i

Lightning Features for Guest Users

☒

i

Upgrade all requests to HTTPS

☒

i

Enable Content Sniffing Protection

☒

i

Enable Browser Cross Site Scripting Protection

☒

i

Referrer URL Protection

☒

i

Guest Access to the Payments API

☐

i

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

Proof of Concept

Nowward, if someone opens the site url and fills the form:

Survey

Name

First Name

Alok

Last Name

Sinfal

* Email

* 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.