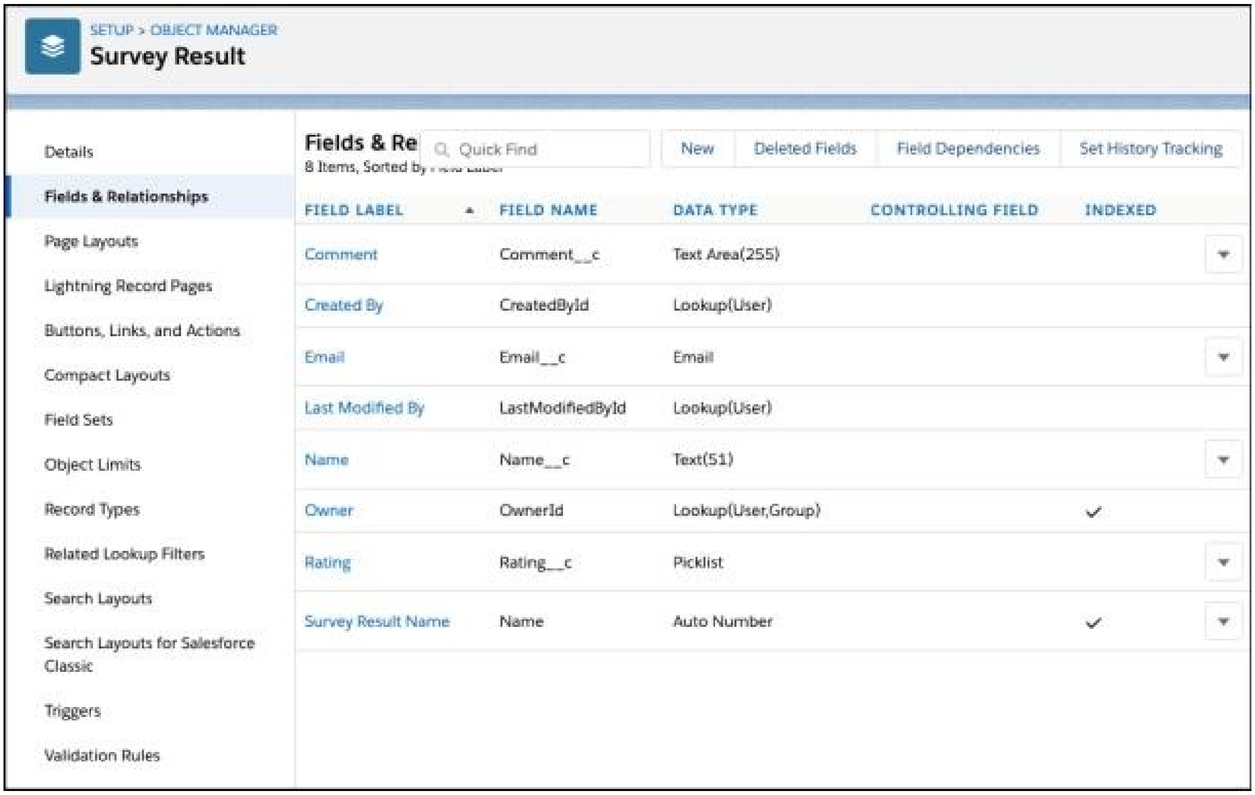
4.Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

The next step is to create a custom object Survey Result and a few custom fields to store survey responses.

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.

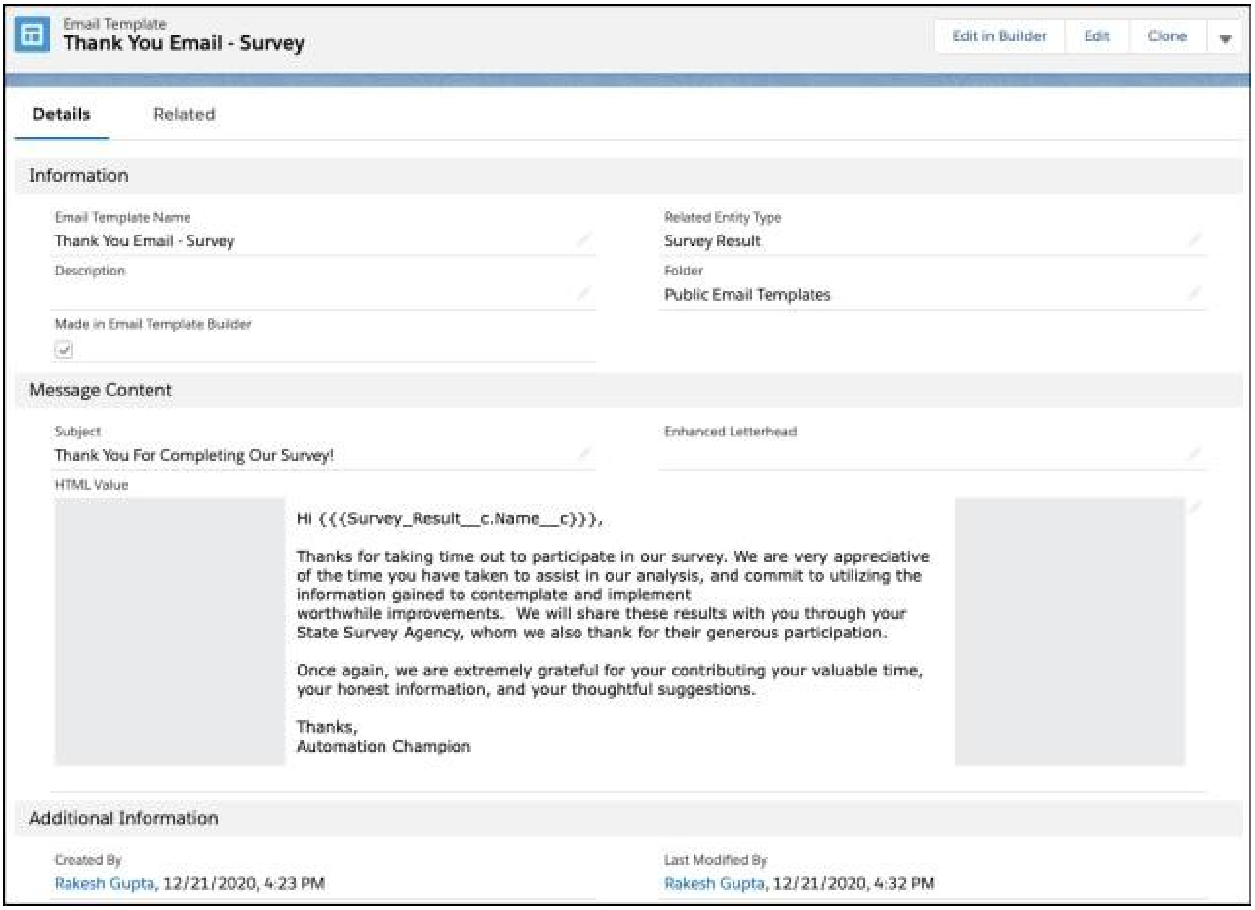


8 Items, Sorted by

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. 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

Information

Email Template Name
Thank You Email - Survey

Related Entity Type
Survey Result

Description

Folder
Public Email Templates

Made in Email Template Builder
☑

Message Content

Subject
Thank You For Completing Our Survey!

Enhanced Letterhead

HTML Value

Hi {{{Survey_Result__c.Name__c}}},

Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.

Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.

Thanks,
Automation Champion

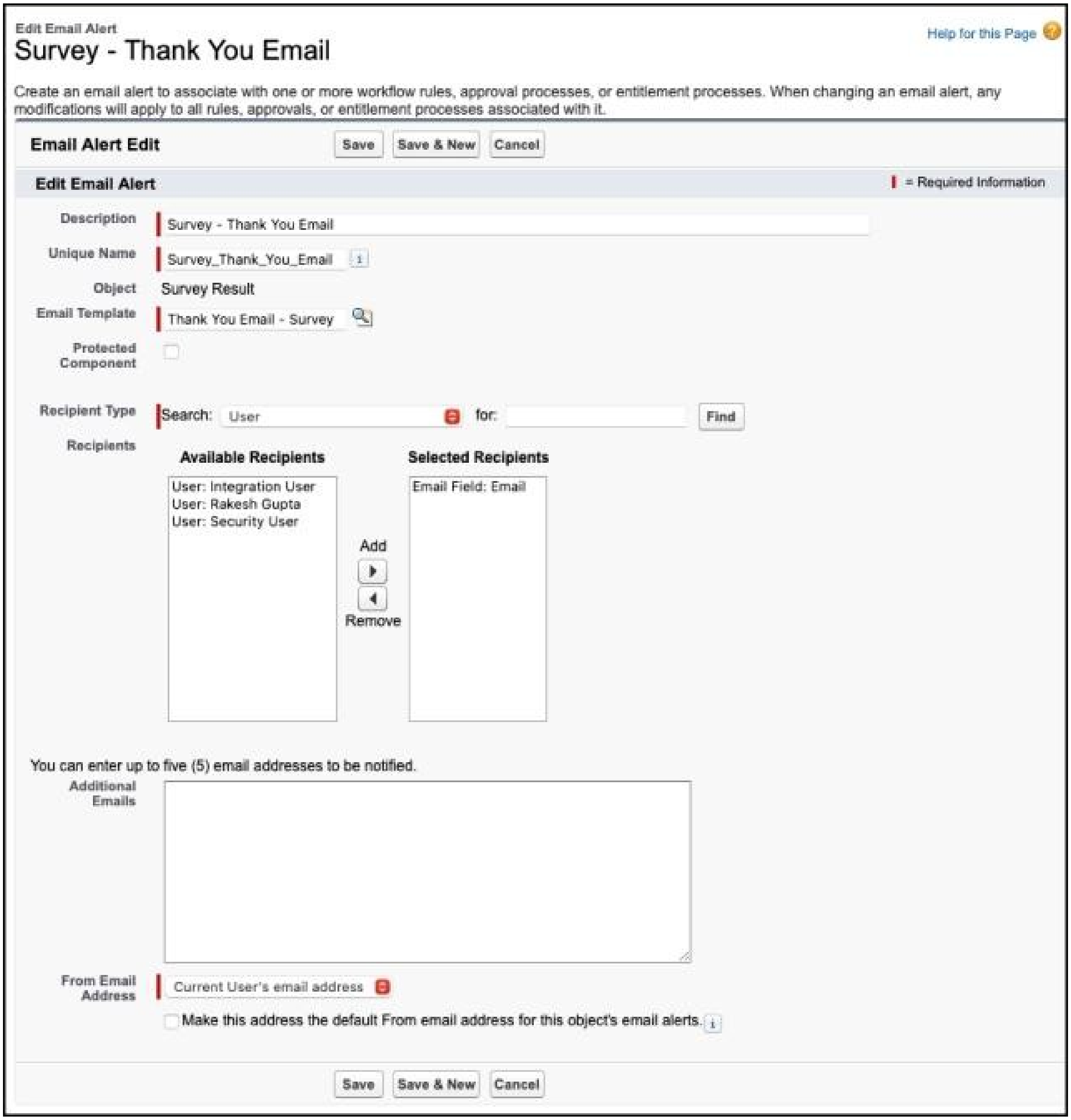
Additional Information

Created By
Rakesh Gupta, 12/21/2020, 4:23 PM

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

Step 3: Create an Email Alert

1. Click Setup.
2. In the Quick Find box, type Email Alerts.
3. Select Email Alerts, click on the New Email Alert button.
4. Name the Email Alert and click the Tab button. The Unique Name will populate.
5. For Object select Survey Result.
6. For the Email Template chooses Lightning Email Template Thank You Email – Survey.
7. For Recipient Type select Email Field: Email.
8. Click Save.



Survey - Thank You Email

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

Edit Email Alert

| = Required Information

Description	Survey - Thank You Email
Unique Name	Survey_Thank_You_Email
Object	Survey Result
Email Template	Thank You Email - Survey
Protected Component	□
Recipient Type	Search: User for:

Recipients

Available Recipients	Selected Recipients
User: Integration User User: Rakesh Gupta User: Security User	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.

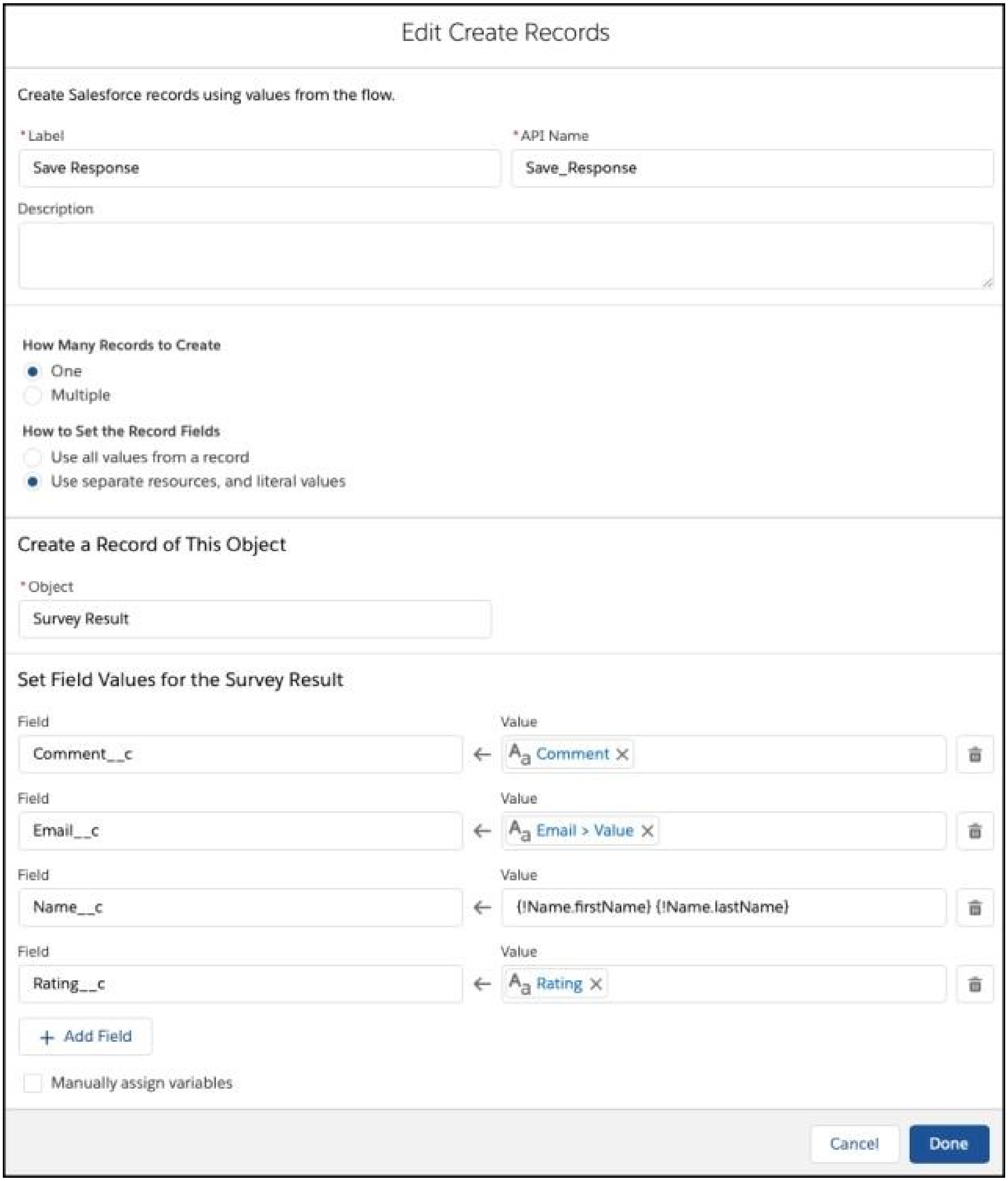
Step 4.1: Salesforce Flow — Create a Screen that Allow Users to Fill Survey

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:
    1. **How do you want to start building: Freeform**

5. 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 Respons

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
    1. Row 1:
    1. Field: Comment__c
    2. Value: {!Comment}
    2. Click Add Row
    3. Row 2:
        1. Field: Email__c
        2. Value: {!Email.value}
    4. Click Add Row
    5. Row 3:
        1. Field: Name__c
        2. Value: {!Name.firstName} {!Name.lastName}
    6. Click Add Row
    7. Row 3:
        1. Field: Rating__c
        2. 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		Value
Comment__c	←	Comment
Email__c	←	Email > Value
Name__c	←	{!Name.firstName} {!Name.lastName}
Rating__c	←	Rating

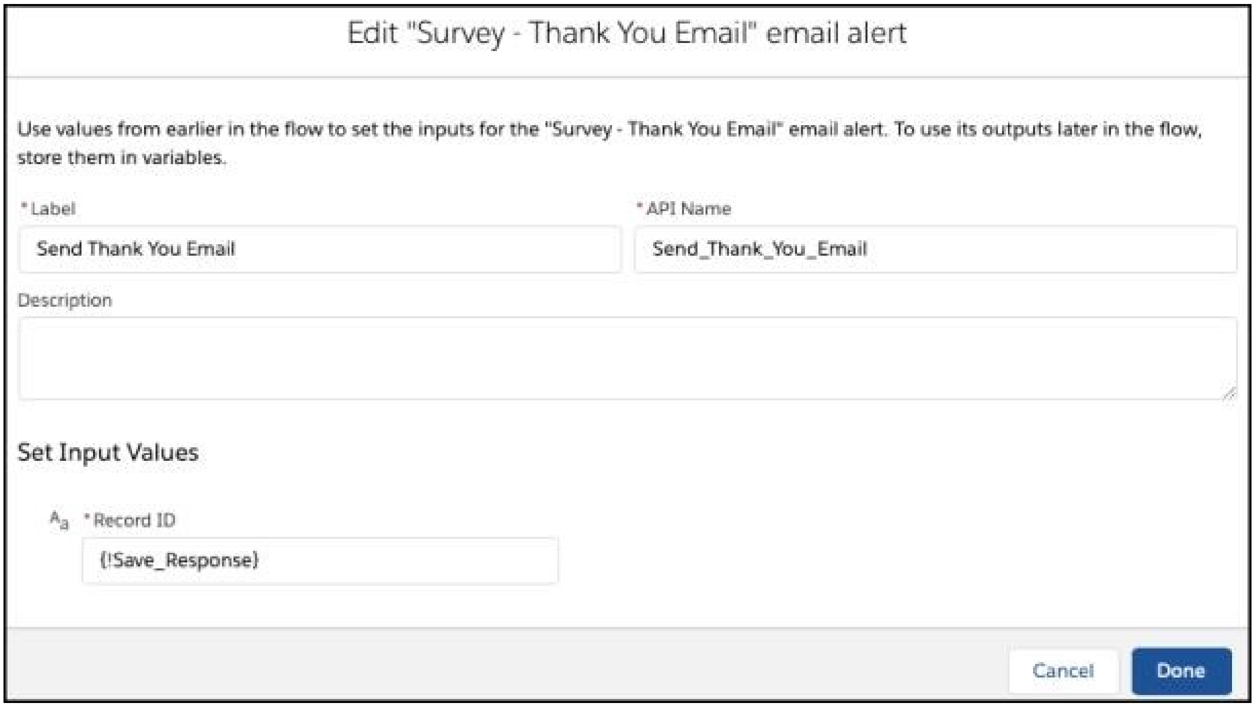
□ Manually assign variables

Step 4.3: Salesforce Flow — Call an Acton — Email Alert to Send Out Thank You Email

The next step is to call the Survey – Thank You Email email alert from flow so that when flow fires it triggers the thank you email to survey participants.

1. Under Toolbox, select Element.

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



Edit "Survey - Thank You Email" email alert

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

*Label: Send Thank You Email

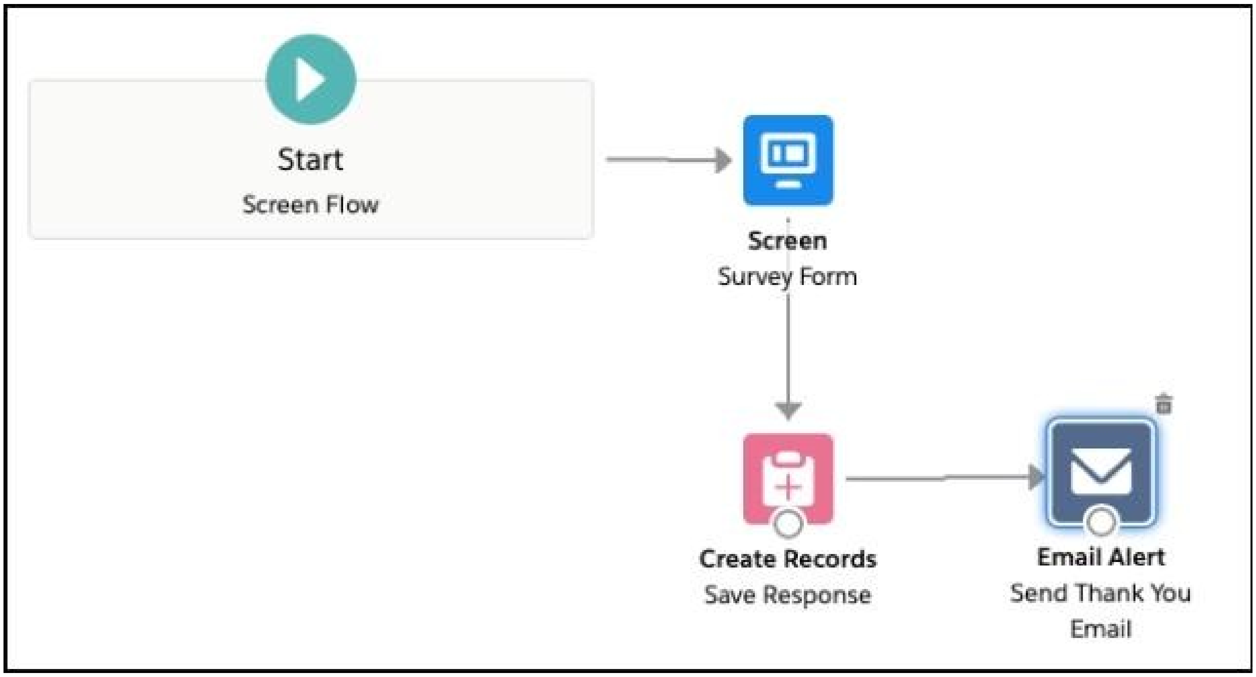
*API Name: Send_Thank_You_Email

Description:

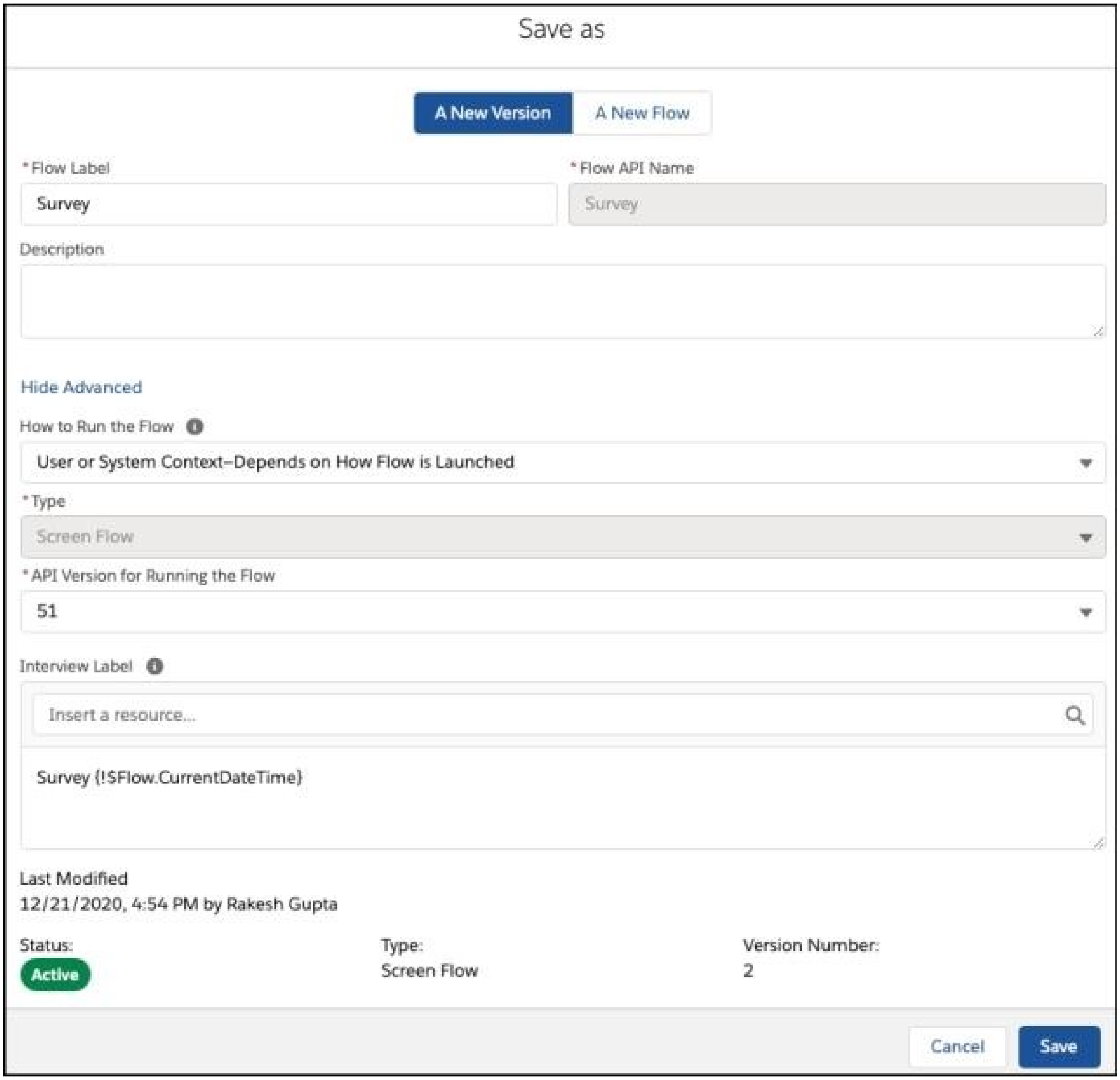
Set Input Values

*Record ID: {!Save_Response}

In the end, Sergio's Flow will look like the following screenshot:



1. Click Save.
2. Enter Flow Label the API Name will auto-populate.
3. Click Show Advanced.
4. How to Run the Flow: User or System Context—Depends on How Flow is Launched
5. Type: Screen Flow
6. API Version for Running the Flow: 51
7. Interview Label: Survey {!$Flow.CurrentDateTime}
8. Click Save


Save as

*Flow Label: Survey

*Flow API Name: Survey

Description

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

Survey {!$Flow.CurrentDateTime}

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

Status: Active

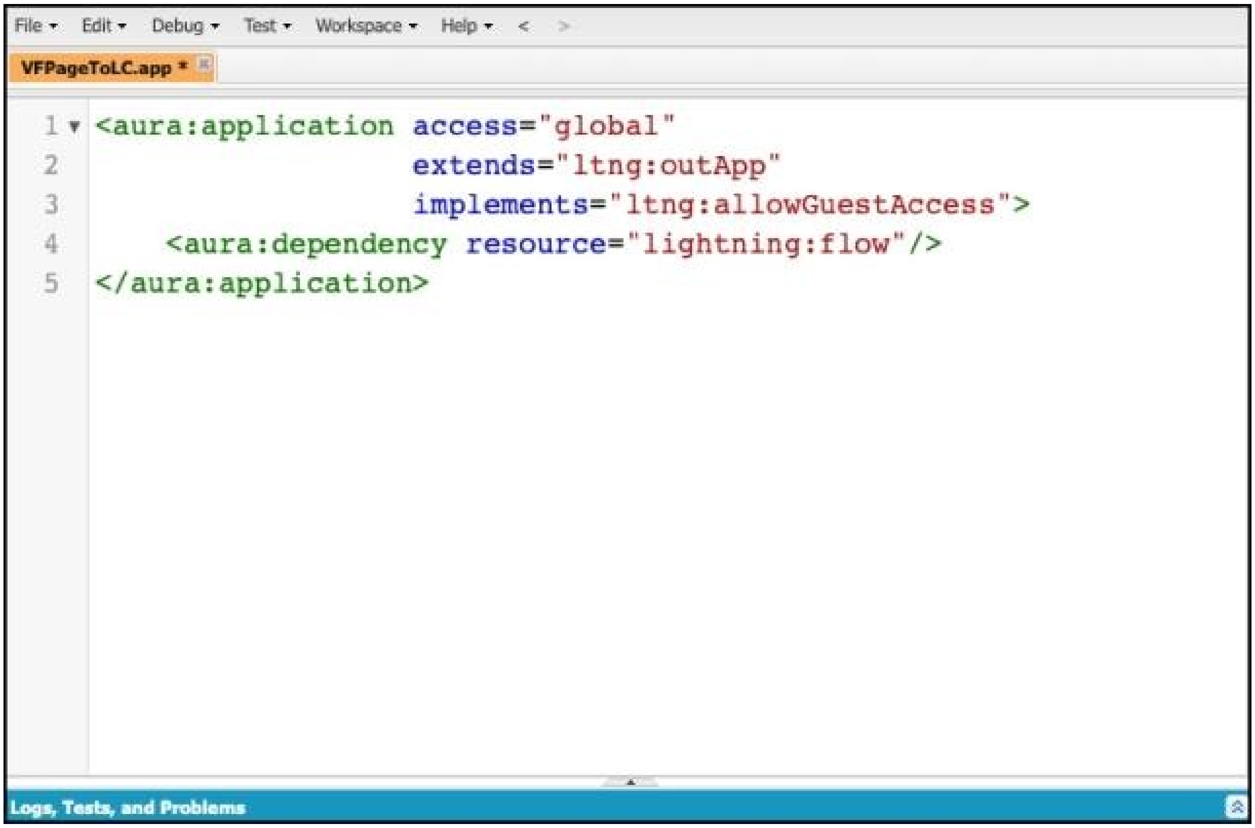
Type: Screen Flow

Version Number: 2

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.

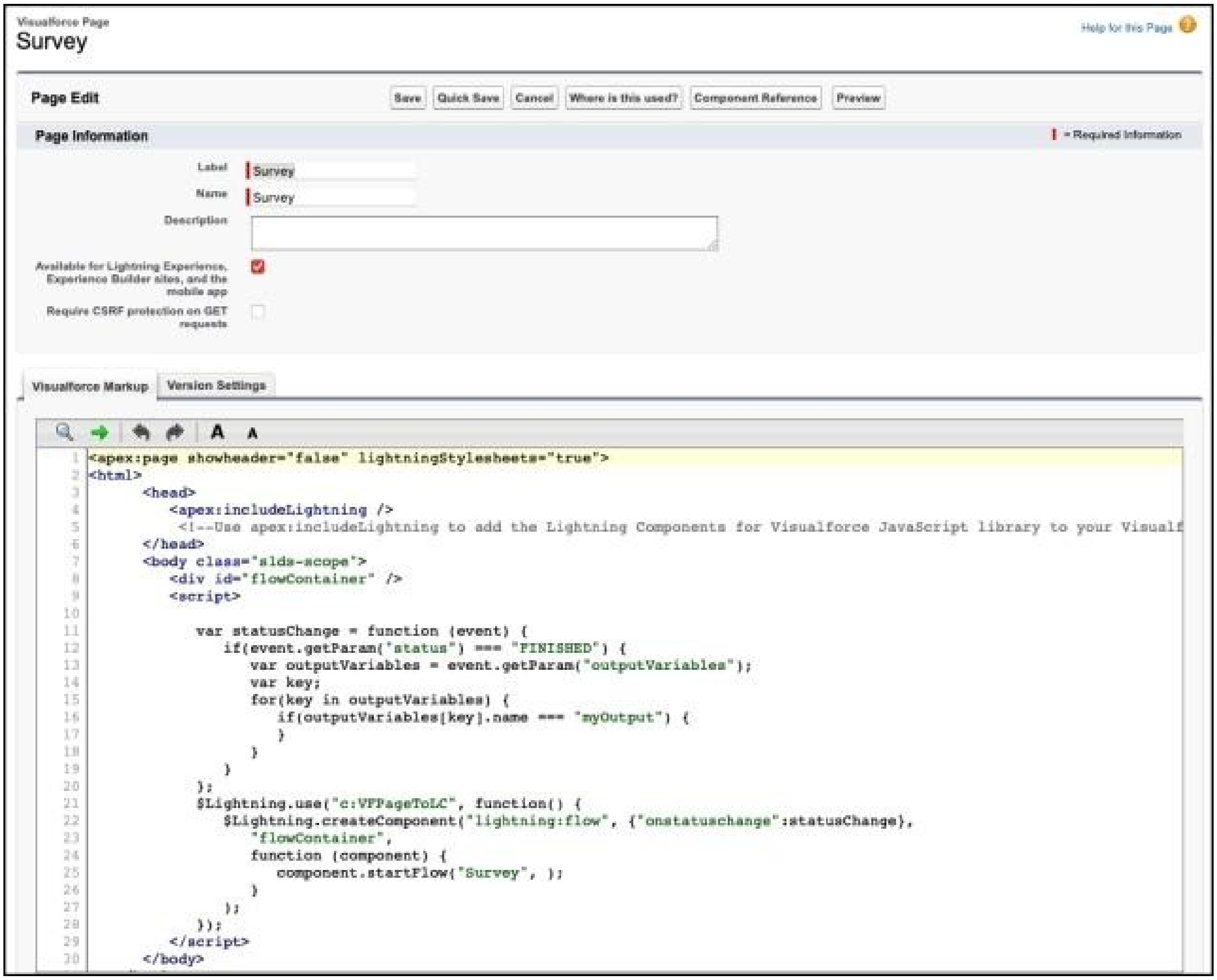
1. Click Setup | Developer Console
2. Navigate to File | New | Lightning Application
3. Enter a Name (VFPageToLC) field, make sure to select the Lightning Out Dependency App checkbox.
4. Click Submit.
5. Copy code from GitHub and paste it into your Lightning Application.
6. Save your code.



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

Step 6: Create a Visualforce Page and Embed Your Flow Into It
Now we will create a Lightning Application that declares a dependency on the lightning:flow component.
Add the Lightning Components for Visualforce JavaScript library to your Visualforce page using the <apex:includeLightning/> component. In the Visualforce page, reference the dependency app. Then write a JavaScript function that creates the component on the page using $Lightning.createComponent()Click Setup.

1. In the Quick Find box, type Visualforce Pages.
2. Clicks on the New button.
3. Copy code from GitHub and paste it into your visualforce page
4. Click Save.



Survey

Page Information

| = Required Information

Label: Survey

Name: Survey

Description:

Available for Lightning Experience, Experience Builder sites, and the mobile app: ☑

Require CSRF protection on GET requests: □

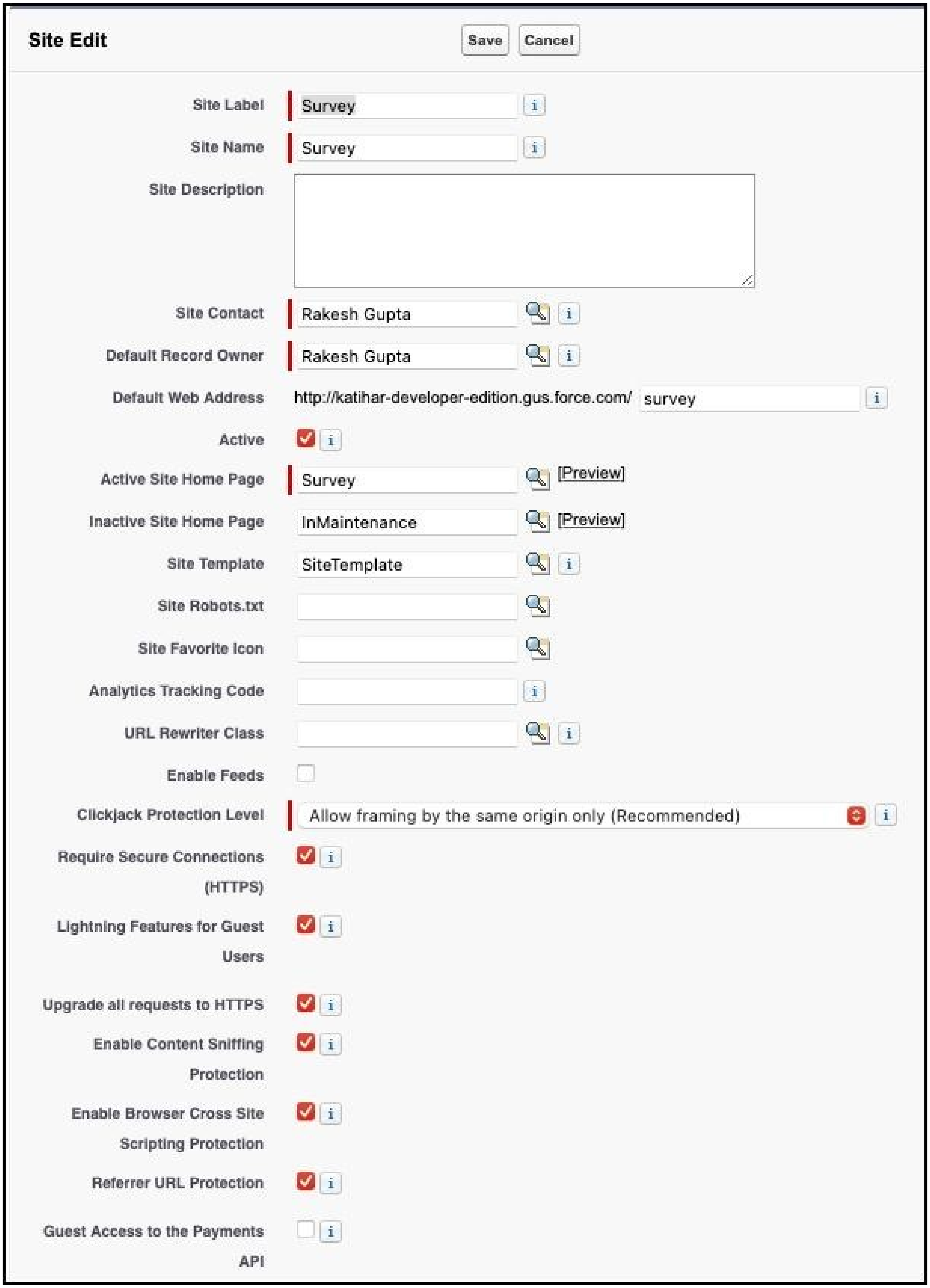
```
<apex:page showheader="false" lightningStylesheets="true">
<html>
        <head>
            <apex:includeLightning />
             <!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualf
        </head>
        <body class='slds-scope'>
            <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:VFPageToLC", function() {
                    $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
                        "flowContainer",
                        function (component) {
                            component.startFlow("Survey", );
                        }
                    );
                });
            </script>
        </body>
```

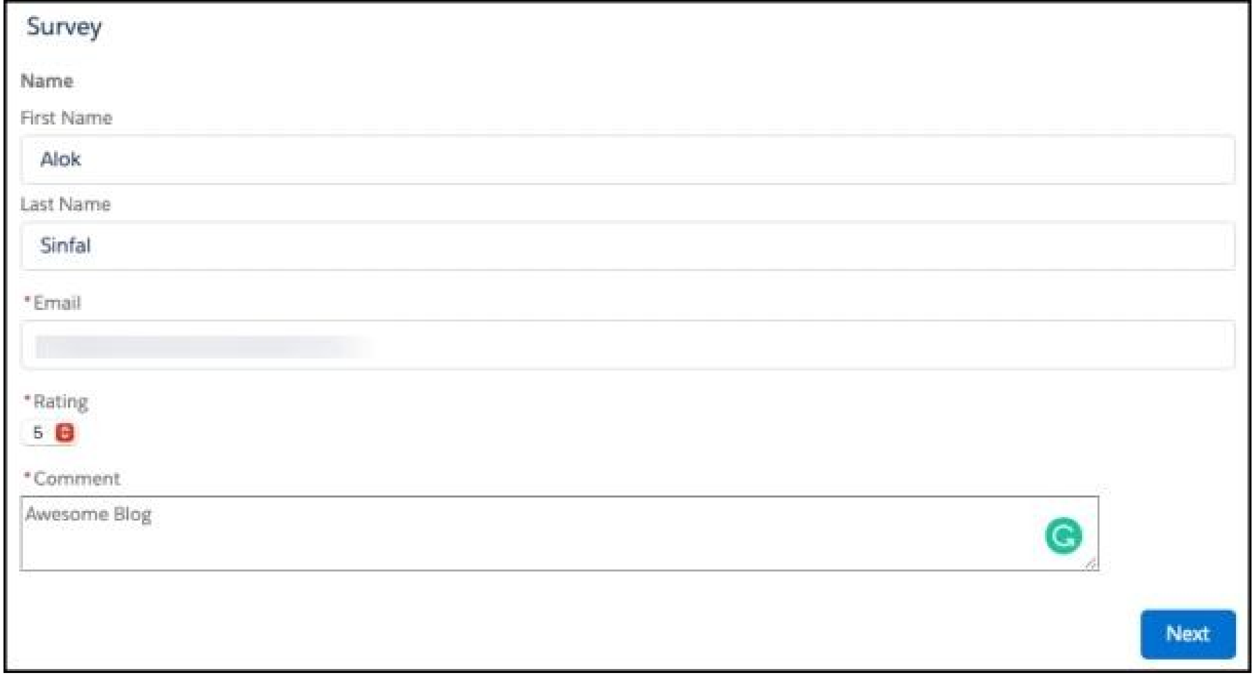
Step 7: Create a Force.com Site to Open Your Flow for Unauthenticated Access

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



Survey

Name

First Name

Alok

Last Name

Sinfal

*Email

[redacted]

*Rating

5

*Comment

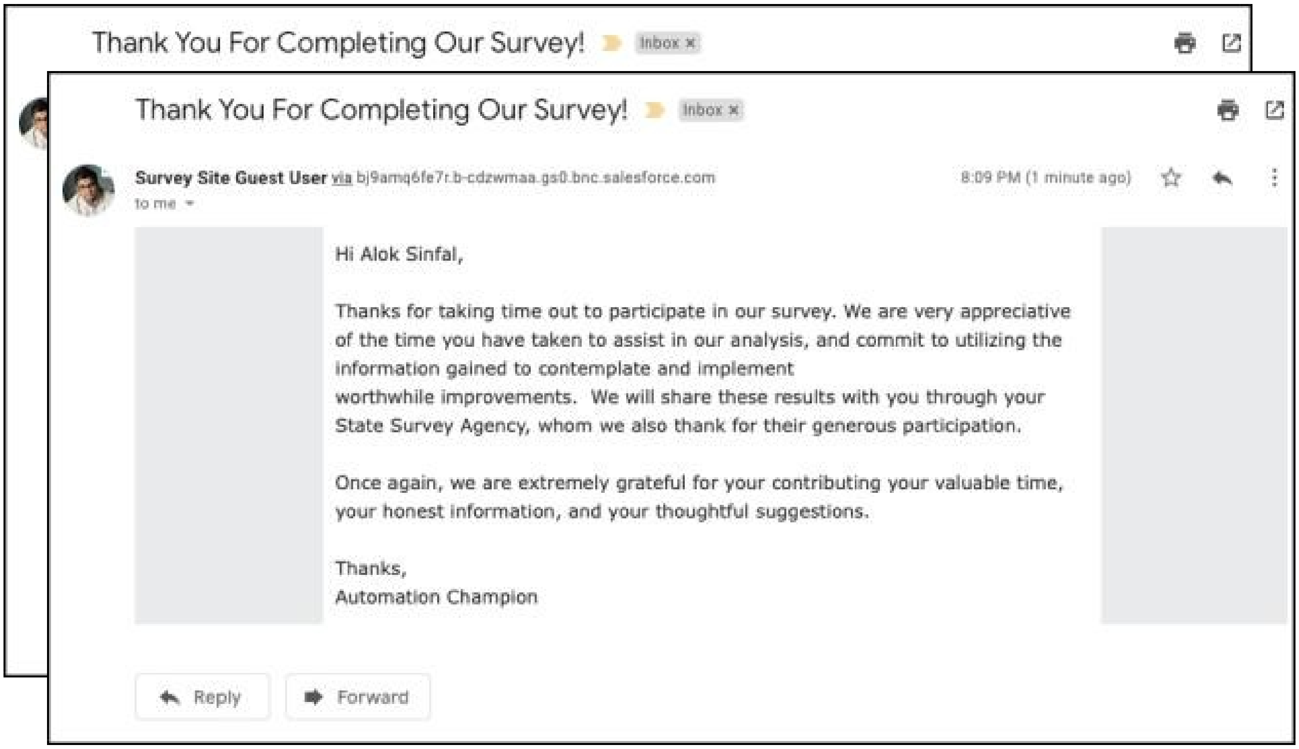
Awesome Blog

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

Proof of Concept

Now onward, if someone opens the site url and fills the form:

After successful submission, he/she will receive an email



Thank You For Completing Our Survey!

Thank You For Completing Our Survey!

Survey Site Guest User via bj9amq6fe7r.b-cdzwmaa.gs0.bnc.salesforce.com

to me

8:09 PM (1 minute ago)

Hi Alok Sinfal,

Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.

Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.

Thanks,
Automation Champion