

NAAN MUDHALVAN
Salesforce Developer(Course)
Assignment no 1

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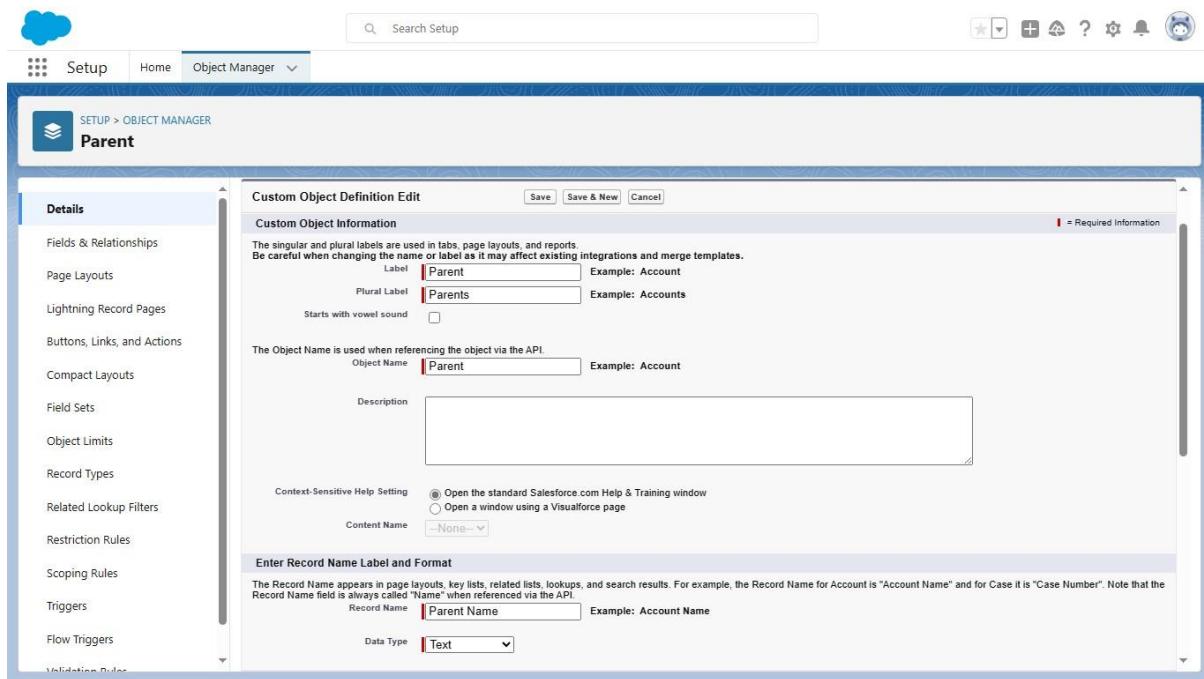
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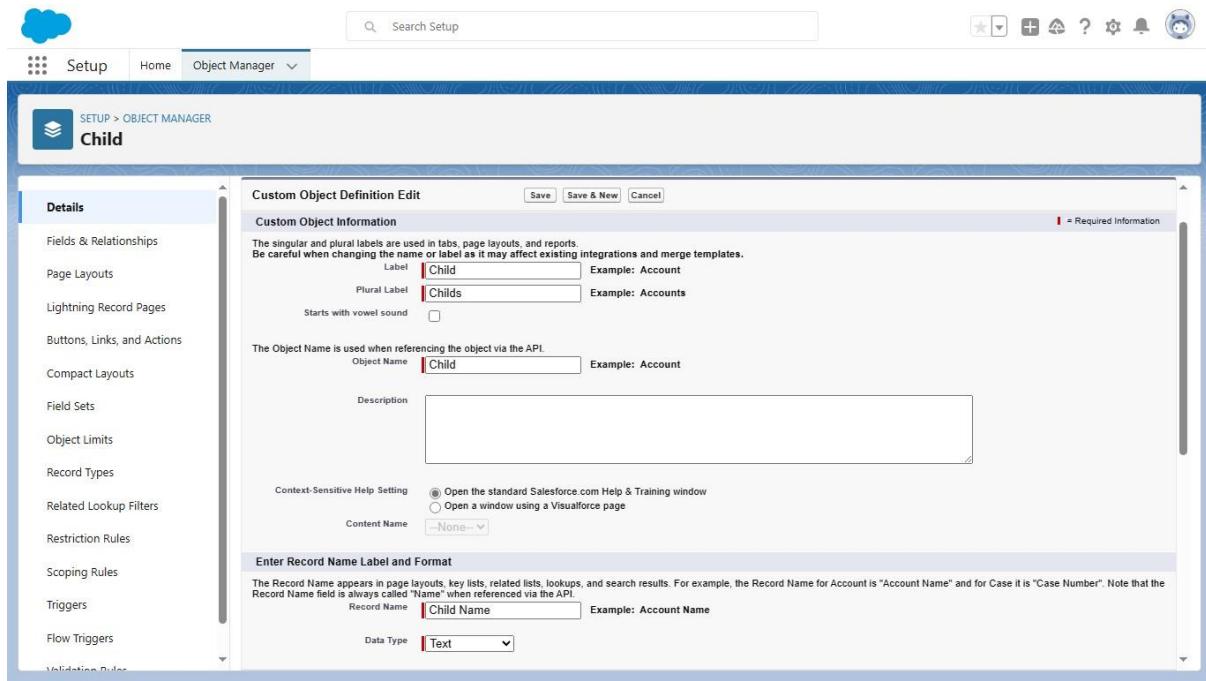
Batch : 2024

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'. Step 1, 'Choose the field type', is displayed. The sub-header 'Step 1' is at the top right. Below it are 'Next' and 'Cancel' buttons. The 'Data Type' section contains several options:

- None Selected: Select one of the data types below.
- Auto Number: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

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

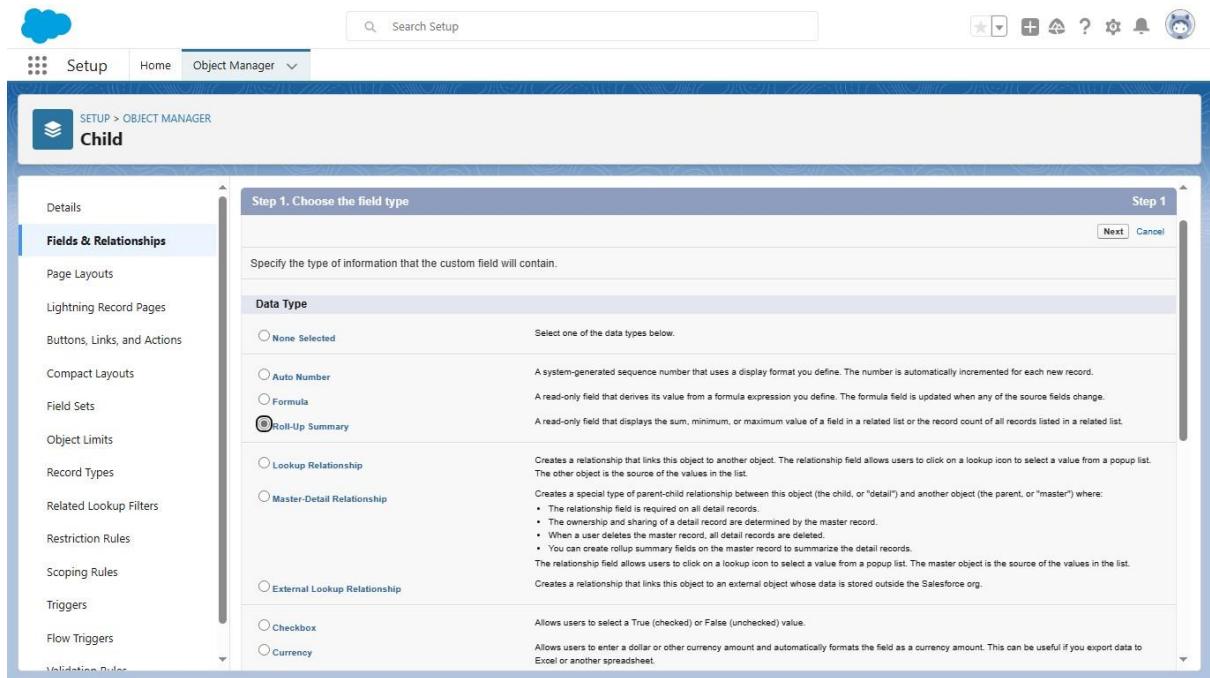
Setup Home Object Manager

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 search bar at the top right says 'Search Setup'. 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'. Under 'Custom Object Tabs', there is a table:

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

Below the table, under 'Web Tabs', it says 'No Web Tabs have been defined'. Under 'Visualforce Tabs', it says 'No Visualforce Tabs have been defined'. Under 'Lightning Component Tabs', it says 'No Lightning component tabs have been defined'. Under 'Lightning Page Tabs', it says 'New | What Is This?'.

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 ...	Ap... ↴	Vi... ↴
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, 11:15 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 <input type="text" value="Parent Details"/>	Image <input type="file"/>																					
* Developer Name <input type="text" value="Madhavan S V"/>	Primary Color Hex Value <input type="text" value="#0070D2"/>																					
Description <input type="text" value="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																						
<table border="1"> <tr><td>Salesforce Navigation</td><td>13 Queue Management</td><td>QueueManagement</td><td>Create and manage queues for your business.</td><td>22/08/2023, 11:15 am</td><td>Lightning</td><td>▼</td></tr> <tr><td>Salesforce Notifications</td><td>14 Sales</td><td>Sales</td><td>The world's most popular sales force automation (SFA) sol...</td><td>22/08/2023, 11:15 am</td><td>Classic</td><td>▼</td></tr> <tr><td>Salesforce Offline</td><td>15 Sales</td><td>LightningSales</td><td>Manage your sales process with accounts, leads, opportun...</td><td>22/08/2023, 11:15 am</td><td>Lightning</td><td>▼</td></tr> </table>		Salesforce Navigation	13 Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2023, 11:15 am	Lightning	▼	Salesforce Notifications	14 Sales	Sales	The world's most popular sales force automation (SFA) sol...	22/08/2023, 11:15 am	Classic	▼	Salesforce Offline	15 Sales	LightningSales	Manage your sales process with accounts, leads, opportun...	22/08/2023, 11:15 am	Lightning	▼
Salesforce Navigation	13 Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2023, 11:15 am	Lightning	▼																
Salesforce Notifications	14 Sales	Sales	The world's most popular sales force automation (SFA) sol...	22/08/2023, 11:15 am	Classic	▼																
Salesforce Offline	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.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and includes sections for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with sub-options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), Data, Email, and Platform Tools. The 'Permission Sets' option is currently selected. The main content area is titled 'permission' and shows a sub-section 'Select Users to Assign'. It displays a list of users with checkboxes next to their names. The user 'Sunil A' has a checked checkbox. The list includes:

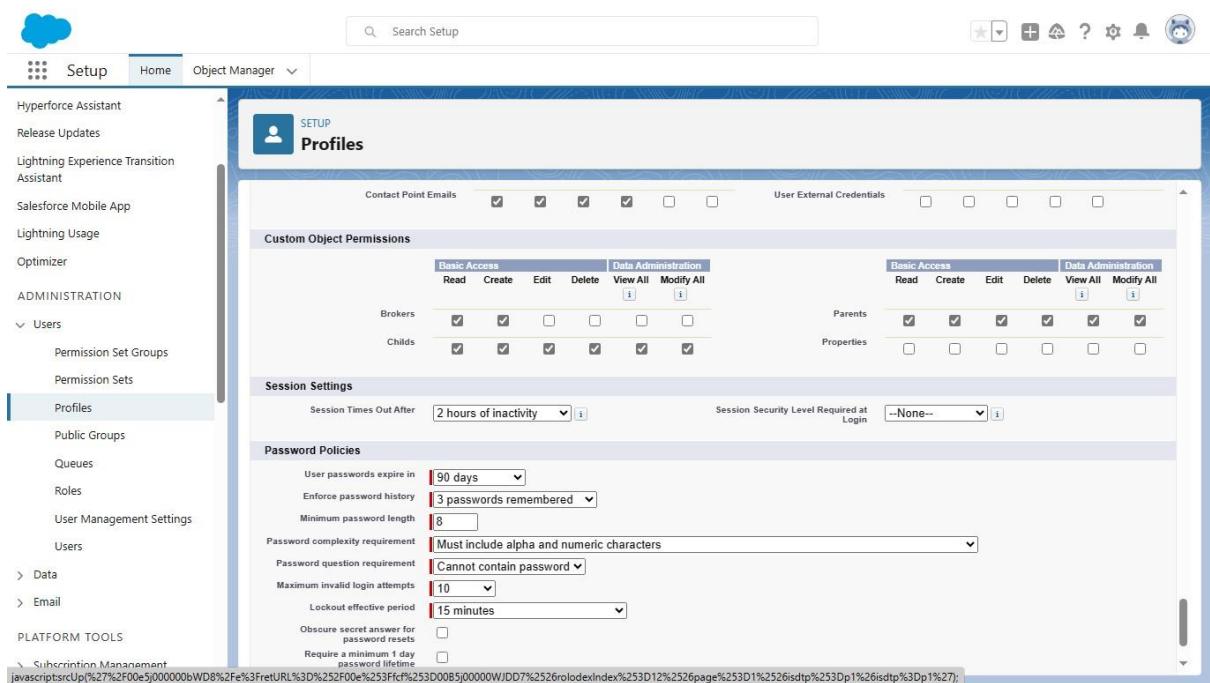
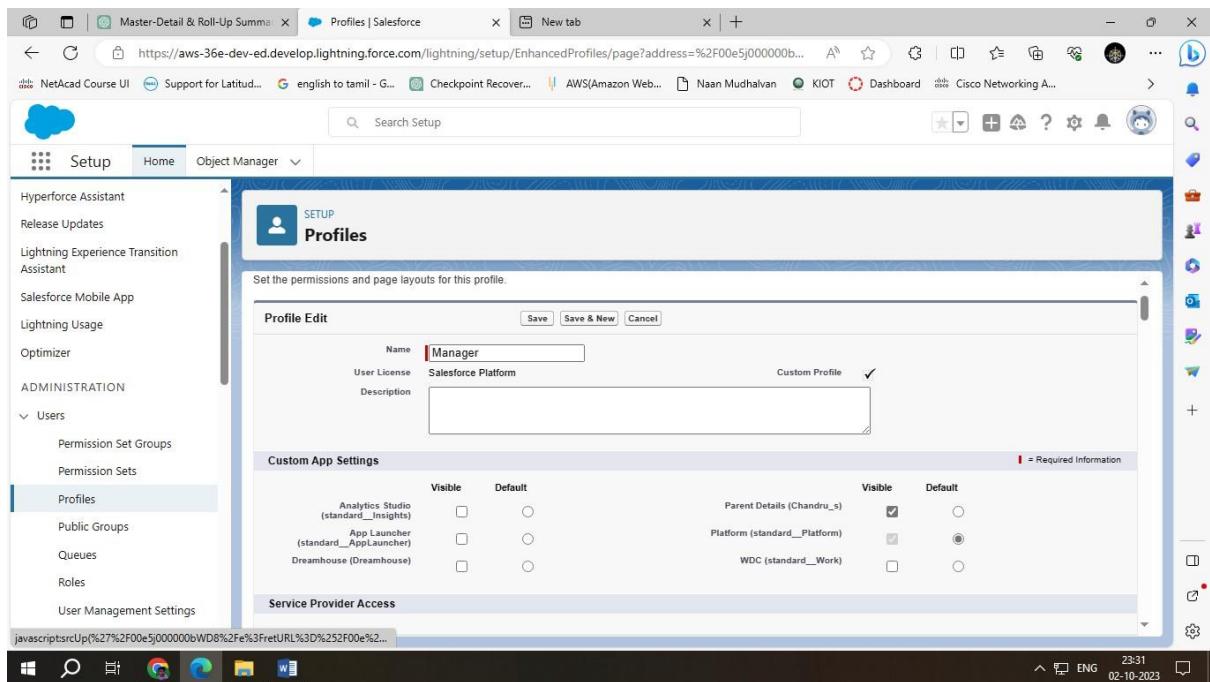
Full Name	Role	Username	Profile
Madhavan S V	CS	au611220244023@naanmudhalvan.com	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzkibsr@chatter.salesforce.com	Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	Analytics Cloud Integration User
Sanjay P	sp	2k22cse171@kiot.ac.in	Bmanager
Security User	sec	insightssecurity@00d5j00000cismqean.com	Analytics Cloud Security User
Sunil A	sa	2k21cse176@kiot.ac.in	Manager

At the bottom right of the list is a 'Next' button.

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

Step 1: Create a Public Group

1. Go to "Setup" in Salesforce.
2. In the Quick Find box, type "Public Groups" and select it.
3. Click on "New Public Group."
4. Create a group for User A, let's call it "UserA_Group," and add User A to this group.
5. Create another group for User B, let's call it "UserB_Group," and add User B to this group.



Step 2: Create Criteria-Based Sharing Rules

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

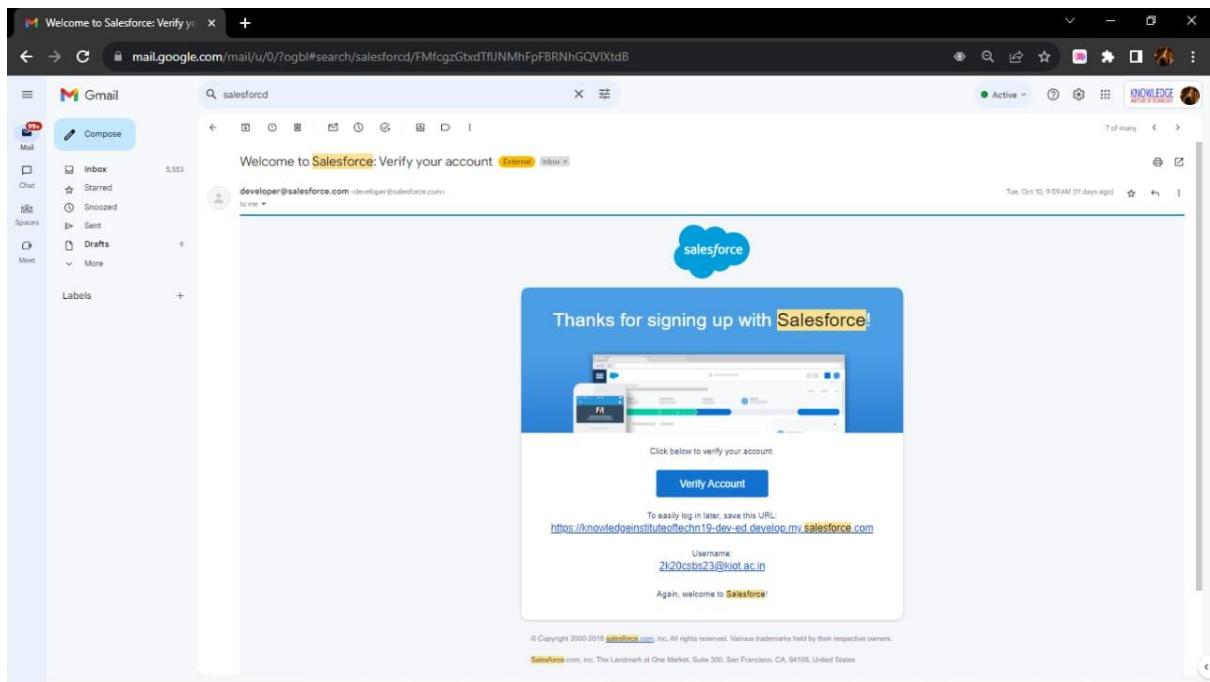
2. In the Quick Find box, type "Sharing Rules" and select "Sharing Settings."

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 "Change Your Password" page for Salesforce. It features a large blue cloud logo at the top. The main heading is "Change Your Password". Below it, a note says "Enter a new password for 2k20csbs23@kiot.ac.in. Make sure to include at least:". There is a list of requirements with checkmarks: "8 characters", "1 letter", and "1 number". The "New Password" field contains "....." and is labeled "Good". The "Confirm New Password" field also contains "....." and is labeled "Match". A note below the fields says "Caps Lock is on.". The "Security Question" section asks "In what city were you born?" with the answer "SALEM" entered. A "Change Password" button is at the bottom.

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

For User B:

- Follow the same steps as above but create a separate sharing rule for User B.
- 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 in the sidebar. The main window displays the 'User Edit' form for creating a new user named 'Sanjay'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' field is set to '<None Specified>'. The 'User License' is set to 'Salesforce Platform'. The 'Profile' is set to 'Bmanager'. The 'Active' checkbox is checked. Other optional checkboxes like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type are available but not selected. The 'Data.com Monthly Addition Limit' is set to 'Default Limit (300)'. Accessibility Mode (Classic or Dark) and High-Contrast Palette (on Charts) options are also present. The 'Load Lightning Pages While' dropdown is set to 'None'.

Step 3: Assign Records Ownership

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected in the sidebar. The main window displays the 'Permission Set Create' form. In the 'Enter permission set information' section, the 'Label' is set to 'permission' and the 'API Name' is also set to 'permission'. The 'Description' field is empty. The 'Session Activation Required' checkbox is unchecked. In the 'Select the type of users who will use this permission set' section, there is a note about choosing a license type. The 'License' dropdown is set to 'None'. The 'Save' and 'Cancel' buttons are at the bottom of the form.

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invitees	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
Asset State Periods	No Access	11	--

Childs

Tab Settings

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

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 type="checkbox"/>
Created By	<input 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
Madhavan S V	CS	au611220244023@naanmudhalvan.com	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzkibsr@chatter.salesforce.com	Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	Analytics Cloud Integration User
Sanjay R	sp	2k22cse171@kiot.ac.in	Bmanager
Security User	sec	insightssecurity@00d5j00000cismqean.com	Analytics Cloud Security User
Sunil A	sa	2k21cse176@kiot.ac.in	Manager

Cancel Next

Subscription Management aws-36e-dev-ed.lightning.force.com/lightning/r/0035j000009Zv6qAAC/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

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

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

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), Data, Email, and Platform Tools (Subscription Management). The main content area displays the "Permission Sets" page, listing various objects and their access levels (e.g., No Access, 26, 6, 14, 15, 33, 4, 18, 24, 30, 6, 1, 20, 41, etc.).

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:** "Permission Sets" (with a user icon).
- Section:** "Permission Set permission".
- Buttons:** "Find Settings...", "Clone", "Edit Properties", "Manage Assignments".
- Breadcrumbs:** "Permission Set Overview > Object Settings > Parents".
- Form Fields:**
 - Parents:** "Available" and "Visible" checkboxes.
 - Tab Settings:** "Available" and "Visible" checkboxes.
 - Object Permissions:** A table with columns "Permission Name" and "Enabled".

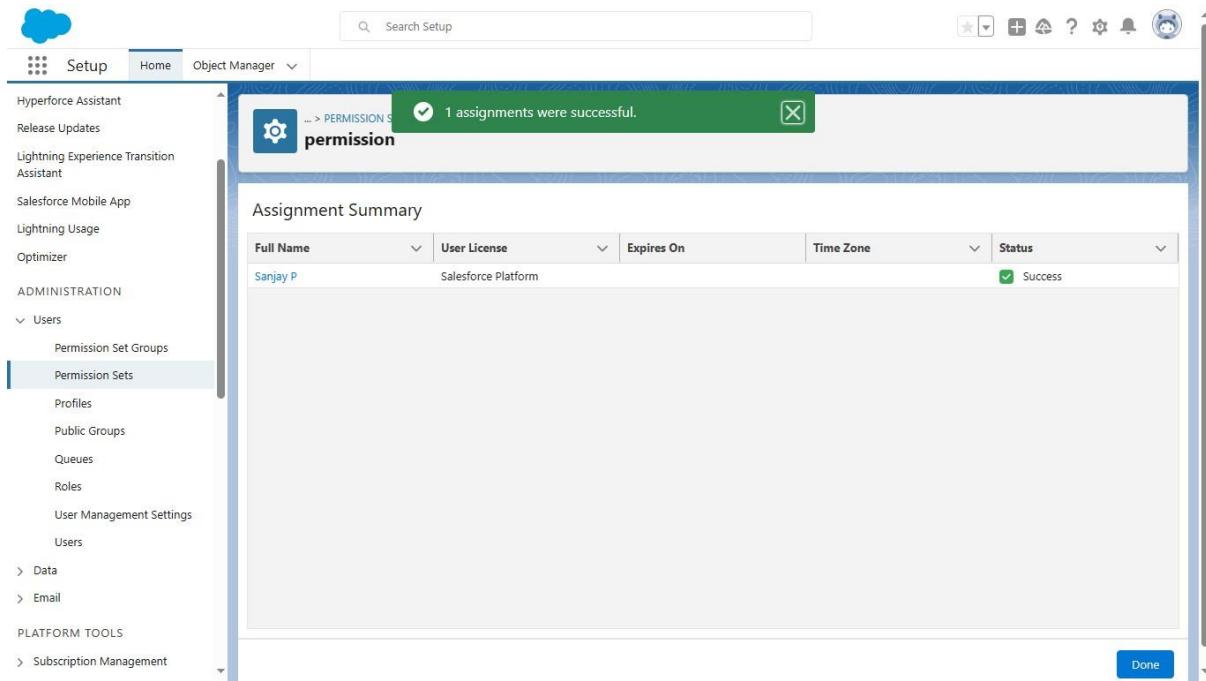
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>
 - Field Permissions:** A table with columns "Field Name", "Read Access", and "Edit Access".

Field Name	Read Access	Edit Access
Child	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
- Page URL:** <https://aws-36e-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/0P55j000007Uxoi/e?s=EntityPermissions&o=015j000002rl5H&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:** "permission" (with a user icon). Subtitle: "... > PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION".
- Section:** "Select Users to Assign".
- Buttons:** "All Users" dropdown, "Search this list..." input field, and "Next" button.
- Table:** A list of users with columns: "Full Name", "Alias", "Username", "Role", "Access", and "Profile".

Full Name	Alias	Username	Role	Access	Profile
Madhavan S V	CS	au611220244023@naanmudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzikbsrf@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Sanjay P	sp	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bmanager
Security User	sec	insightssecurity@00d5j00000cismqean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
- Buttons:** "Cancel" and "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.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A_Sumit	SA	2k21cse176@kiot.ac.in		<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Chatter Expert	Chatter	shatty_00d50000000csmoean.eodfzklbsrl@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	P_Sanjay	SQ	2k22cse171@kiot.ac.in		<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	MadhavanSV	CS	au611220244023@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00d5000000csmoean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	ses	Insightsecurity@00d5000000csmoean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Manager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Cross_Org_Data_Proxy_User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	Custom_Marketing_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Custom_Sales_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Custom_Support_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Customer_Community_Login_User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/>	Customer_Community_Plus_Login_User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/>	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 object layouts assigned to the profile.

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

- Setup Home**: The current page is "Profiles".
- Basic Access** and **Data Administration** sections are visible for Brokers, Parents, and Properties.
- Session Settings**: Session Times Out After is set to "2 hours of inactivity".
- Password Policies**: User passwords expire in "90 days", and there are 3 passwords remembered. Minimum password length is 8, and it must include alpha and numeric characters.
- Save Buttons**: Save, Save & New, Cancel.

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

- Profile Edit**: The profile is named "chan".
- Profile Details**: Name is "chan", User License is "Salesforce Platform", and Description is empty.
- Custom App Settings**: Shows settings for Analytics Studio, App Launcher, Dreamhouse, Parent Details, Platform, and WDC.
- Service Provider Access**: Shows access for various services.
- Tab Settings**: Overwrite users' personal tab customizations is checked. Standard Tab Settings: Home is selected, Default On.
- Save Buttons**: Save, Save & New, Cancel.

The screenshot shows the Salesforce Lightning Experience interface. The left sidebar is titled 'ADMINISTRATION' and includes sections for 'Optimizer', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The 'Users' section is currently selected. The main content area is titled 'All Users' and displays a table of users. The columns include 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. The table lists several users, each with a checkbox and edit links. The profiles listed are Manager, Chatter Free User, System Administrator, Analytics Cloud Integration User, and Analytics Cloud Security User.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the one in the top screenshot, with the 'Users' section selected. The main content area is titled 'New User' and shows a 'User Edit' form. The 'General Information' tab is active. The form fields include: First Name (Sunil), Last Name (A), Alias (sa), Email (2k20cse176@kiot.ac.in), Username (2k20cse176@kiot.ac.in), Nickname (User1696321490080232961), Title (Blank), Company (Male), Department (Blank), Division (Blank), Role (<None Specified>), User License (Salesforce Platform), Profile (chan), Active (checked), Marketing User (unchecked), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), Site.com Contributor User (unchecked), Site.com Publisher User (unchecked), WDC User (unchecked), Data.com User Type (<None>), Data.com Monthly Additional Limit (Default Limit (300)), Accessibility Mode (Classic Only) (unchecked), High-Contrast Palette on Charts (unchecked), and Load Lightning Pages While (checkbox checked).

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'Sunil A'. The page includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, and various checkboxes for roles like Marketing User, Offline User, Knowledge User, etc. The 'Role' dropdown is set to '<None Specified>'. The 'User License' dropdown is set to 'Salesforce Platform'. The 'Profile' dropdown is set to 'chan'. The 'Active' checkbox is checked. The 'Last Log In' field shows 'Never'. The 'Last Activity' field shows 'Never'.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Edit' page for a user named 'Sunil A'. The page includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Role, User License, Profile, Active status, and various checkboxes for roles like Marketing User, Offline User, Knowledge User, etc. The 'Role' dropdown is set to '<None Specified>'. The 'User License' dropdown is set to 'Salesforce Platform'. The 'Profile' dropdown is set to 'chan'. The 'Active' checkbox is checked. The 'Last Log In' field shows 'Never'. The 'Last Activity' field shows 'Never'.

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. On the left, the navigation sidebar includes links like 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. Under Administration, there are sections for Users, Permission Set Groups, and Permission Sets. The 'Permission Sets' section is currently selected. The main content area displays a 'Permission Set Overview' for 'Permission01'. The 'Edit Properties' dialog is open, showing fields for Label (permission01), API Name (permission01), and Description. Other tabs in the dialog include App Permissions, Apex Class Access, Visualforce Page Access, and External Data Source Access. The top right of the main window shows standard setup icons.

This screenshot shows the same Salesforce Setup interface as the first one, but with a different focus. The 'Object Settings' tab is selected in the 'Accounts' section of the 'Object Permissions' table. The table has two columns: 'Permission Name' (Read, Create, Edit, Delete, View All, Modify All) and 'Enabled' (checkboxes). Below this is a 'Field Permissions' table with columns for 'Field Name' (Account Name, Account Number, Account Owner, Account Site, Account Source, Active, Annual Revenue) and 'Read Access' and 'Edit Access' (checkboxes). The top right of the main window shows standard setup icons.

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, Users, Permission Set Groups, and Permission Sets (which is selected).
- Main Content:** The title is "Permission Sets" under "SETUP". A permission set named "permission01" is selected. The "Accounts" tab is active. The "Object Permissions" section shows the following table:

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"/>

The "Field Permissions" section shows the following table:

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"/>

There is also a "Video Tutorial | Help for this Page" link at the top right.

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, Users, Permission Set Groups, and Permission Sets (which is selected).
- Main Content:** The title is "All Users" under "SETUP". It shows a list of users with the following columns: Full Name, Alias, Username, Role, Actions, and Profile. Two users are selected: Sunil A and Sunil A.

Full Name	Alias	Username	Role	Actions	Profile
Madhavan SV	CS	au611220244023@naanmudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.ecdfzkibsrf@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Sanjay P	sp	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bmanager
Security User	sec	insightssecurity@00d5j00000cismqean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
Sunil A	sa	2k21cse176@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	chan
Sunil A	sa	2k23cse176@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	chan

Buttons at the bottom include "Cancel" and "Next".

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Selected Users' and displays a table of users assigned to a permission set. The table columns are: Full Name, Role, Profile, Active, User License, and Expires On. Two users, 'Sunil A' and 'Sunil A', are listed, both assigned to the 'chan' profile and having 'Salesforce Platform' user licenses with 'Never Expires' expiration dates. Above the table, there are options for specifying an expiration date (radio buttons for 'No expiration date' and 'Specify the expiration date', with sub-options for 1 Day, 1 Week, 30 Days, 60 Days, and Custom Date) and a 'Time Zone' dropdown. At the bottom right are 'Back' and 'Assign' buttons.

The screenshot shows the Salesforce Setup interface after the assignment. A green success message at the top states '... > PERMISSION S ... 2 assignments were successful.' Below it, the title 'permission01' is displayed. The main content area is titled 'Assignment Summary' and shows a table of assigned users. The table columns are: Full Name, User License, Expires On, Time Zone, and Status. Two users, 'Sunil A' and 'Sunil A', are listed, both assigned to the 'Salesforce Platform' user license and marked as 'Success' in the status column. At the bottom right is a 'Done' button.

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

Step 1: Create a custom object

1.Click Setup.

2.In the Object Manager, click Create | Custom Object.

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

screenshot below:

4. Click Save.

The screenshot shows the 'Survey Result' object in the Object Manager. The 'Fields & Relationships' tab is selected. The table lists the following fields:

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

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 Madhavan S V, 12/10/2023, 5:32 PM	Last Modified By Madhavan S V, 12/10/2023, 5:32 PM
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Step 3: Create an Email Alert

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

8.Click Save.

The screenshot shows the 'Edit Email Alert' interface for a 'Survey - Thank You Email'. The 'Description' field contains 'Survey - Thank You Email'. The 'Unique Name' field is set to 'Survey_Thank_You_Email'. The 'Object' is 'Survey Result'. The 'Email Template' is 'Thank You Email - Survey'. The 'Protected Component' checkbox is unchecked. Under 'Recipients', there is a search bar for 'User' and a 'Find' button. The 'Available Recipients' list includes 'User: Integration User', 'User: Rakesh Gupta', and 'User: Security User'. The 'Selected Recipients' list has one entry: 'Email Field: Email'. Below the recipient section, a note says 'You can enter up to five (5) email addresses to be notified.' There is a 'From Email Address' field set to 'Current User's email address' with a checkbox option to make it the default. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

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

1.Click Setup.

2.In the Quick Find box, type Flows.

3.Select Flows then click on the New Flow.

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

5.How do you want to start building: Freeform

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

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

Response

- 1.Drag-and-drop the Create Records element onto the Flow designer.
- 2.Enter a name in the Label (Save Response) field; the API Name will auto-populate.
- 3.For How Many Records to Create – select One.
- 4.For How to Set the Record Fields – select Use separate resources, and literal values.
- 5.Select the Survey_Result__c object from the dropdown list.
- 6.Set Field Values for the Survey Result

Row 1:

Field: Comment__c

Value: { !Comment }

Click Add Row

Row 2:

Field: Email__c

Value: { !Email.value }

Click Add Row

Row3:

Field: Name__c

Value: { !Name.firstName } { !Name.lastName }

Click Add Row

Row 3:

Field: Rating__c

Value: { !Rating }

7.Click Done.

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 <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>	

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**

Set Field Values for the Survey Result

Field <input type="text" value="Comment__c"/>	Value <input type="text" value="A_a Comment <input type='button' value='X' style='float: right;' />"/>
Field <input type="text" value="Email__c"/>	Value <input type="text" value="A_a Email > Value <input type='button' value='X' style='float: right;' />"/>
Field <input type="text" value="Name__c"/>	Value <input type="text" value="(!Name.firstName) (!Name.lastName) <input type='button' value='X' style='float: right;' />"/>
Field <input type="text" value="Rating__c"/>	Value <input type="text" value="A_a Rating <input type='button' value='X' style='float: right;' />"/>
<input type="button" value="+ Add Field"/>	
<input type="checkbox"/> Manually assign variables	

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

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 <input type="text" value="Survey"/>	* Flow API Name <input type="text" value="Survey"/>	
Description <input type="text"/>		
Hide Advanced		
How to Run the Flow ⓘ <input type="text" value="User or System Context—Depends on How Flow is Launched"/>		
* Type <input type="text" value="Screen Flow"/>		
* API Version for Running the Flow <input type="text" value="51"/>		
Interview Label ⓘ <input type="text" value="Survey {!\$Flow.CurrentDateTime}"/>		
Last Modified 12/10/2023, 5:32 PM by Madhavan S V		
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

```

<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="Madhavan S V"/>	
Default Record Owner <input type="text" value="Madhavan S V"/>	
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.