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**Salesforce Developer(Course)**  
**Assignment no 1**

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**Year & Dep : IV year & CSBS**

**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.

The screenshot shows the 'Custom Object Definition Edit' page for the 'Parent' object. The 'Label' field is set to 'Parent' and the 'Plural Label' is 'Parents'. The 'Object Name' field is also set to 'Parent'. A 'Description' field is present but empty. Under 'Context-Sensitive Help Setting', the 'Open the standard Salesforce.com Help & Training window' option is selected. The 'Content Name' dropdown is set to 'None'. In the 'Enter Record Name Label and Format' section, the 'Record Name' field is 'Parent Name' and the 'Data Type' is 'Text'.

The screenshot shows the 'Custom Object Definition Edit' page for the 'Child' object. The 'Label' field is set to 'Child' and the 'Plural Label' is 'Children'. The 'Object Name' field is also set to 'Child'. A 'Description' field is present but empty. Under 'Context-Sensitive Help Setting', the 'Open the standard Salesforce.com Help & Training window' option is selected. The 'Content Name' dropdown is set to 'None'. In the 'Enter Record Name Label and Format' section, the 'Record Name' field is 'Child Name' and the 'Data Type' is '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 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 Setup interface with the following details:

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** SETUP > OBJECT MANAGER
- Page Title:** Parent
- Left Sidebar:** A sidebar titled "Fields & Relationships" containing a list of items:
  - 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
- Table:** The main content area displays a table titled "Fields & Relationships" with the following data:

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)		✓

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Parent New Custom Field' under 'Step 1. Choose the field type'. The left sidebar lists various setup categories like 'Fields & Relationships', 'Page Layouts', etc. The right panel details the 'Data Type' selection, with 'Master-Detail Relationship' selected. A detailed description of this relationship type is provided, mentioning it creates a parent-child relationship between the current object and another object.

The screenshot shows the Salesforce Setup interface for creating a new relationship. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Parent New Relationship' under 'Step 2. Choose the related object'. The left sidebar lists various setup categories. The right panel shows a dropdown menu titled 'Related To' with 'Child' selected. A progress bar at the bottom indicates 'Step 2 of 6'.

**Fields & Relationships**

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 1. Choose the field type**

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

**Data Type**

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

## 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.**

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

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

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

The screenshot shows the 'Lightning Experience App Manager' page. The left sidebar has a search bar and navigation links for Setup, Home, Object Manager, and various Salesforce mobile and desktop app categories. The main content area displays a table titled 'Lightning Experience App Manager' with 22 items. The columns are: App Name, Developer Name, Description, Last Modified, Type, and several dropdown arrows. The table lists standard Salesforce apps like All Tabs, Analytics Studio, App Launcher, etc.

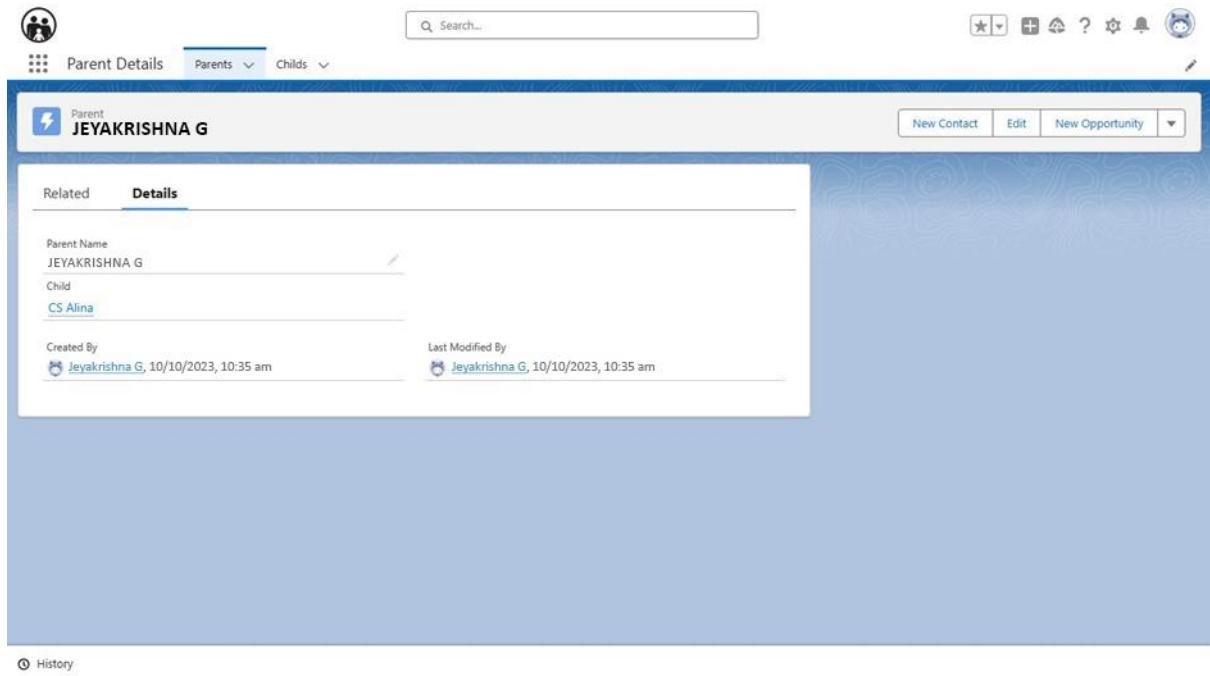
The screenshot shows the 'New Lightning App' configuration page. It includes sections for 'App Details' (App Name: Parent Details, Developer Name: Jeyakrishna G, Description: Enter a description...) and 'App Branding' (Image upload button, Primary Color Hex: #0070D2). There's also an 'Org Theme Options' checkbox and an 'App Launcher Preview' section. A 'Next' button is visible at the bottom right. The background shows a list of existing apps.

## 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.**

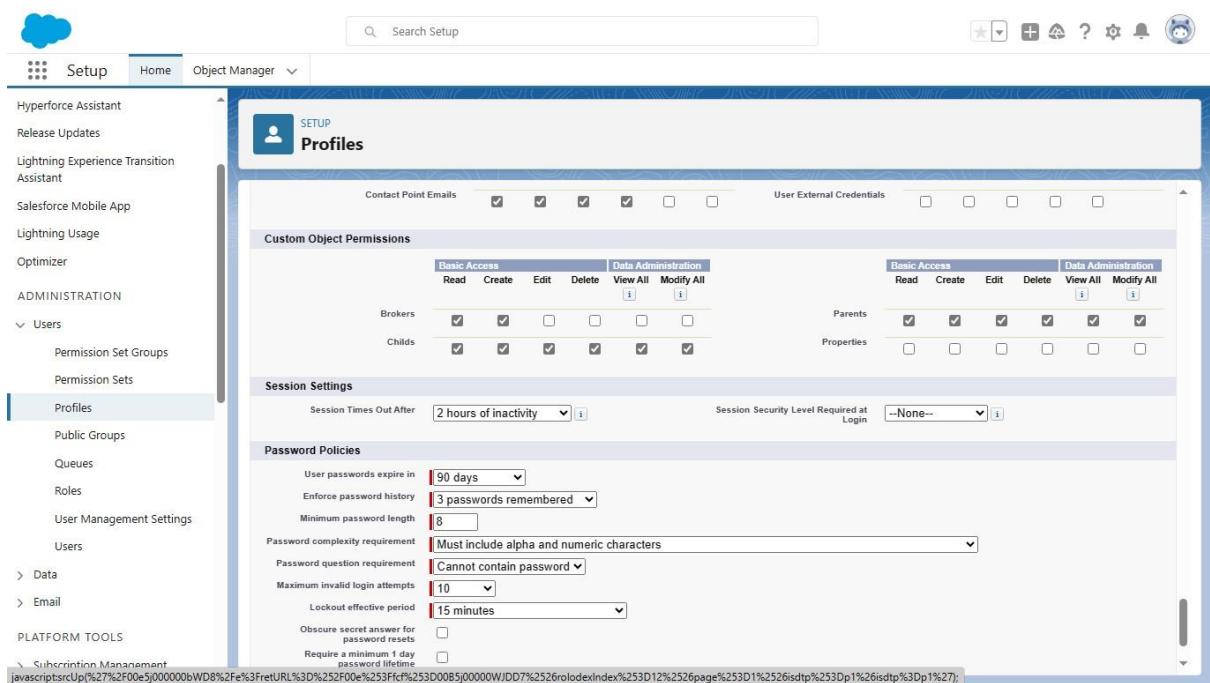
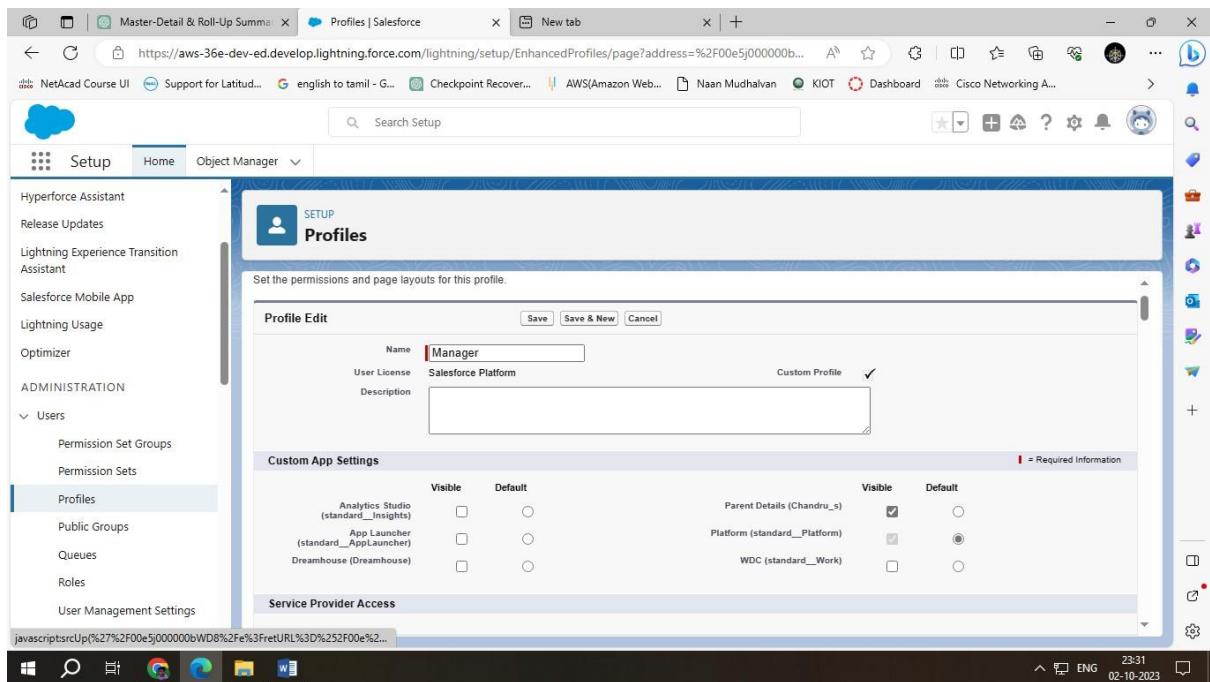


The screenshot shows a Salesforce contact record for 'JEYAKRISHNA G'. The 'Details' tab is active. In the 'Parent Name' field, 'JEYAKRISHNA G' is listed. Under the 'Child' section, 'CS Alina' is listed. At the bottom, it shows the creation and modification details: 'Created By' and 'Last Modified By' both show 'Jeyakrishna G, 10/10/2023, 10:35 am'.

**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.**

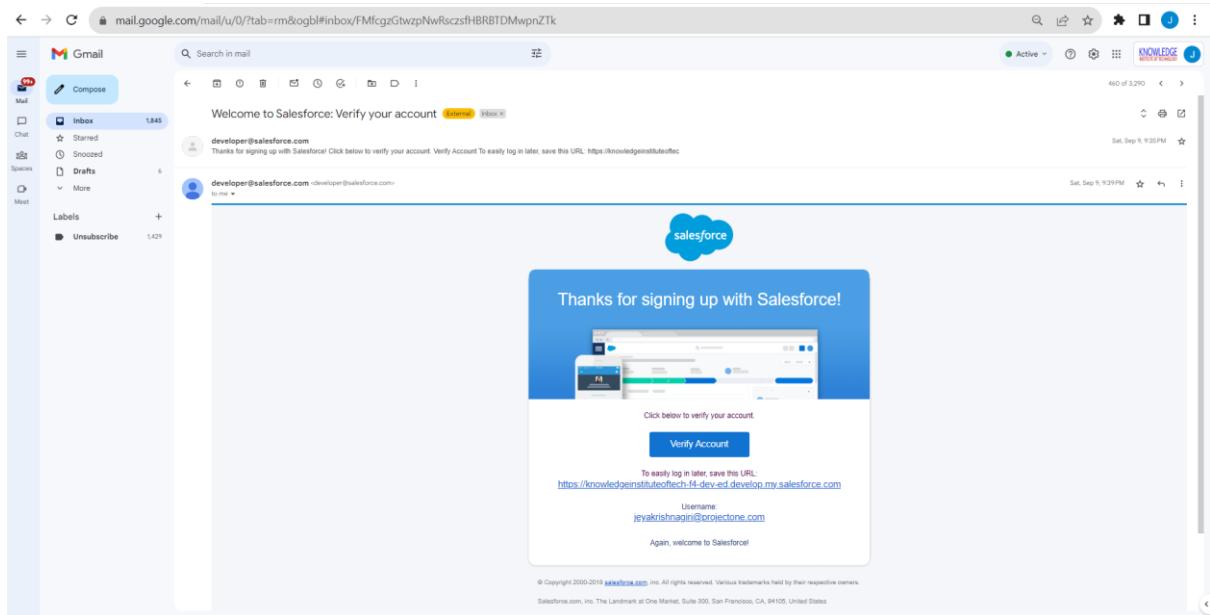
**2. In the Quick Find box, type "Sharing Rules" and select "Sharing Settings."**

**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 'Change Your Password' page on Salesforce. It prompts the user to enter a new password, specifying requirements: 8 characters, 1 letter, and 1 number. Below these requirements, there are fields for 'New Password' and 'Confirm New Password'. A note indicates that Caps Lock is on. There is also a 'Security Question' field asking 'In what city were you born?' and an 'Answer' field containing 'SALEM'. A 'Change Password' button is at the bottom.

Change Your Password

Enter a new password for 2k20csbs15@kiot.ac.in. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

\* New Password

..... Good

\* Confirm New Password

..... Match

⚠ Caps Lock is on.

Security Question

In what city were you born?

\* Answer

SALEM

Change Password

**Profile Edit**

**Bmanager**

Set the permissions and page layouts for this profile.

**Profile Edit**

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

**Profile Edit**

**Bmanager**

Set the permissions and page layouts for this profile.

**Custom Object Permissions**

Object	Basic Access					Data Administration		Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All		
Brokers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Parents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Childs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Properties	<input checked="" 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 with the 'Users' tab selected in the sidebar. The main window displays the 'User Edit' form for creating a new user. The 'General Information' section contains fields for First Name (Sanjay), Last Name (P), Alias (sp), Email (2k20cse171@kiot.ac.in), Username (2k22cse171@kiot.ac.in), Nickname (User1696315620912300622), and various optional checkboxes for roles like Marketing User, Offline User, etc. The 'Data.com User Type' dropdown is set to 'None'. The 'Data.com Monthly Addition Limit' dropdown is set to 'Default Limit (300)'. The 'Accessibility Mode' dropdown is set to 'Classic'. The 'High-Contrast Palette on Charts' checkbox is checked. 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. The 'Enter permission set information' section includes fields for Label (permission), API Name (permission), and Description. The 'Session Activation Required' checkbox is unchecked. The 'Select the type of users who will use this permission set' section includes a note about choosing a license type. The 'Who will use this permission set?' section lists three options: 'Choose - None', 'Choose a specific user license', and 'Choose a specific permission set license'. The 'Not sure what a permission set license is?' link is present. The 'License' dropdown is set to 'None'. The 'Save' and 'Cancel' buttons are at the bottom of the form.

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

- Left Navigation Bar:** Shows categories like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-options like Users, Permission Set Groups, and Permission Sets), and PLATFORM TOOLS.
- Current Page:** The main content area is titled "Permission Sets" under the "SETUP" tab. It displays a table of "Object Settings" for the "permission" object.
- Table Headers:** Object Name, Object Permissions, Total Fields, Tab Settings.
- Table Data:** A list of objects and their permissions, such as Accounts (No Access, 40 fields), AI Record Insights (No Access, 27 fields), API Anomaly Event Stores (No Access, 14 fields), and so on.

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

- Left Navigation Bar:** Same as the first screenshot, showing the "Permission Sets" option selected.
- Current Page:** The main content area is titled "Permission Sets" under the "SETUP" tab. It displays the "Childs" tab settings for the "permission" object.
- Tab Settings:** Shows "Available" and "Visible" columns with checkboxes.
- Object Permissions:** A table showing permission levels for various actions: Read, Create, Edit, Delete, View All, and Modify All. Most actions have the "Enabled" checkbox checked.
- Field Permissions:** A table showing access levels for specific fields: Child Name (Read Access checked, Edit Access unchecked) and Created By (Read Access unchecked, Edit Access checked).

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
Jeyakrishna G	CS	au811220244015@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:

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar (Users):**
  - Hyperforce Assistant
  - Release Updates
  - Lightning Experience Transition Assistant
  - Salesforce Mobile App
  - Lightning Usage
  - Optimizer
  - ADMINISTRATION**
  - Users
    - Permission Set Groups
    - Permission Sets**
    - Profiles
    - Public Groups
    - Queues
    - Roles
    - User Management Settings
    - Users
  - Data
  - Email- Platform Tools:** Subscription Management
- Page Content:** **SETUP Permission Sets**
  - Permission Set 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 checked="" 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**

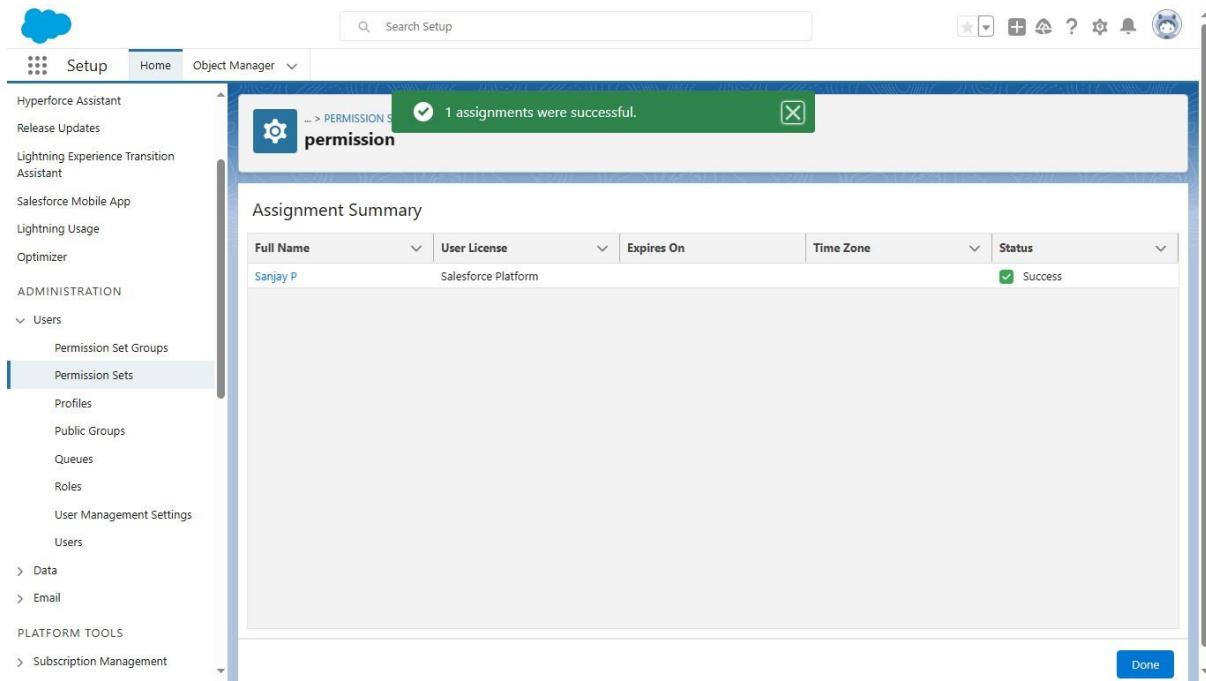
Field Name	Read Access	Edit Access
Child	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar (Users):**
  - Hyperforce Assistant
  - Release Updates
  - Lightning Experience Transition Assistant
  - Salesforce Mobile App
  - Lightning Usage
  - Optimizer
  - ADMINISTRATION**
  - Users
    - Permission Set Groups
    - Permission Sets**
    - Profiles
    - Public Groups
    - Queues
    - Roles
    - User Management Settings
    - Users
  - Data
  - Email- Platform Tools:** Subscription Management
- Page Content:** **PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION**
  - permission**
  - Select Users to Assign
  - All Users** | **1 item selected**
  - Search this list... |
  - Full Name** ↑ | **Ali...** | **Username** | **Role** | **Ac...** | **Profile**

Full Name	Ali...	Username	Role	Ac...	Profile
Jeyakrishna G	CS	au611220244015@naanmudhalvan.com	<input checked="" type="checkbox"/>	System Administrator	
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzikbsrf@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	
Integration User	integ	integration@00d5j00000cismqean.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
Sanjay P	sp	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>	Bmanager	
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.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	A_Sunil	sa	2k21cse176@kiot.ac.in	Manager	✓	Manager
<a href="#">Edit</a>	Chatter_Expert	Chatter	chatty_00d50000000csmoean.eodfzklbsrl@chatter.salesforce.com	Chatter Free User	✓	Chatter Free User
<a href="#">Edit</a>	P_Sanjay	sq	2k22cse171@kiot.ac.in	Manager	✓	Manager
<a href="#">Edit</a>	Jeeyakrishna_G	CS	au611220240015@naanmudhalvan.com	System Administrator	✓	System Administrator
<a href="#">Edit</a>	User_Integration	integ	integration@00d50000000csmoean.com	Analytics Cloud Integration User	✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	ses	Insightsecurity@00d50000000csmoean.com	Analytics Cloud Security User	✓	Analytics Cloud Security User

Action	Profile Name	User License	Custom
<a href="#">Edit   Clone</a>	Analytics_Cloud_Integration_User	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Analytics_Cloud_Security_User	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Authenticated_Website	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Authenticated_Website	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit   Del ...</a>	Manager	Salesforce Platform	✓
<a href="#">Edit   Clone</a>	Chatter_External	Chatter External	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Chatter_Free	Chatter Free	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Chatter_Moderator	Chatter Free	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Contract_Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	XOrg_Proxy_User	XOrg Proxy User	<input type="checkbox"/>
<a href="#">Edit   Del ...</a>	Custom_Marketing_Profile	Salesforce	✓
<a href="#">Edit   Del ...</a>	Custom_Sales_Profile	Salesforce	✓
<a href="#">Edit   Del ...</a>	Custom_Support_Profile	Salesforce	✓
<a href="#">Edit   Clone</a>	Customer_Community_Login_User	Customer Community Login	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Customer_Community_Plus_Login	Customer Community Plus Login	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Customer_Community_Plus	Customer Community Plus	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface for cloning a profile. The left sidebar includes sections like Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users), Data, Email, Platform Tools (Subscription Management, Apps, Feature Settings, Slack, MuleSoft, Einstein), and Quick Find.

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

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

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

The screenshot shows the Salesforce Setup interface for viewing the details of the 'chan' profile. The left sidebar includes sections like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), and Quick Find.

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

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

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

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets
- Profiles**
- Public Groups
- Queues
- Roles
- User Management Settings

Cloud

Search Setup

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save Save & New Cancel

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets
- Profiles**
- Public Groups
- Queues
- Roles
- User Management Settings

Cloud

Search Setup

SETUP Profiles

Profile Edit chan

Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit

Name: chan

User License: Salesforce Platform

Custom Profile:

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 checked="" type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home Default On Learning Default On

Screenshot of the Salesforce Lightning Experience showing the 'Users' page under 'ADMINISTRATION'.

The URL is <https://aws-36e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home>

**Left Navigation Bar:**

- Lightning Usage
- Optimizer
- ADMINISTRATION**
  - 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

**Page Content:**

## All Users

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

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

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

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	A_Sunil	sa	2k20cse176@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00050000000usemcpean.eodfzki0sr@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	P_Sanjay	sr	2k20cse171@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager
<a href="#">Edit</a>	jevalishra.G	CS	au611220244015@naanrmudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	User_Integration	Integ	integration@00050000000usemcpean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	ses	insightssecurity@00050000000usemcpean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

Screenshot of the Salesforce Setup interface showing the 'New User' page under 'ADMINISTRATION'.

The URL is [Search Setup](#)

**Left Navigation Bar:**

- Lightning Usage
- Optimizer
- ADMINISTRATION**
  - 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

**Page Content:**

## New User

Help for this Page

**User Edit**

**General Information**

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

**Required Information**

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 'Session Activation Required' checkbox is checked. The 'Created by' field shows Chandru S. and the 'Last Modified By' field also shows Chandru S. with the timestamp 03/10/2023, 1:59 pm.

This screenshot shows the same Salesforce Setup interface as the previous one, but with a different view. 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 'Field Name' (Account Name, Account Number, Account Owner, Account Site, Account Source, Active, Annual Revenue) and 'Read Access' and 'Edit Access' checkboxes. Some fields like Account Name and Account Owner have their checkboxes checked.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (Users, Permission Set Groups). The main content area displays the 'permission01' permission set, showing object permissions for 'Accounts' and field permissions for various account fields.

**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"/>

The screenshot shows the Salesforce Setup interface with the 'All Users' page open. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (Users, Permission Set Groups). The main content area displays a list of users, with two items selected. A modal dialog is overlaid on the page, allowing users to manage selected profiles.

**All Users**

Full Name	Role	Profile
Jeyakrishna G	System Administrator	
Chatter Expert	Chatter Free User	
Integration User	Analytics Cloud Integration User	
Sanjay P	Bmanager	
Security User	Analytics Cloud Security User	
Sunil A	chan	
Sunil A	chan	

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, or 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 left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows show fields such as Comment, Created By, Email, Last Modified By, Name, Owner, Rating, and Survey Result Name, each with its respective data type and field dependencies.

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

## Step 2: Create a Thank You For Survey Lightning Email Template

- 1.Click App Launcher.
- 2.In the Quick Find box, type Email Templates.
- 3.Clicks on the New Email template button.
- 4.Name the Lightning Email Template and make sure to store it in the Public Email Templates folder.
- 5.Create a template like the following screenshot

Email Template  
Thank You Email - Survey

**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 Jeyakrishna G, 12/10/2023, 5: 32 PM	Last Modified By Jeyakrishna G, 12/10/2023, 5: 32 PM
---	---

### Step 3: Create an Email Alert

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

## 8.Click Save.

Edit Email Alert

Survey - Thank You Email

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

Email Alert Edit

Description: Survey - Thank You Email

Unique Name: Survey\_Thank\_You\_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for:

Recipients:

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

Add  Remove

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

Additional Emails

From Email Address: Current User's email address

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

Save Save & New Cancel

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

1.Click Setup.

2.In the Quick Find box, type Flows.

3.Select Flows then click on the New Flow.

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

5.How do you want to start building: Freeform

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

## Step 4.2: Salesforce Flow – Add a Record 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.

<b>*Label</b> <input type="text" value="Save Response"/>	<b>*API Name</b> <input type="text" value="Save_Response"/>
<b>Description</b> <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	Value
<input type="text" value="Comment__c"/>	<input type="text" value="A_a Comment X"/> <span style="float: right;">←</span> <span style="float: right;">✖</span> <span style="float: right;">trash</span>
<input type="text" value="Email__c"/>	<input type="text" value="A_a Email &gt; Value X"/> <span style="float: right;">←</span> <span style="float: right;">✖</span> <span style="float: right;">trash</span>
<input type="text" value="Name__c"/>	<input type="text" value="(!Name.firstName) (!Name.lastName)"/> <span style="float: right;">✖</span> <span style="float: right;">trash</span>
<input type="text" value="Rating__c"/>	<input type="text" value="A_a Rating X"/> <span style="float: right;">←</span> <span style="float: right;">✖</span> <span style="float: right;">trash</span>
<a href="#" style="color: blue;">+ Add Field</a>	
<input type="checkbox"/> Manually assign variables	

Cancel
Done

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

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

## Edit "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 href="#">A New Version</a>	<a href="#">A New Flow</a>	
<b>* Flow Label</b> <input type="text" value="Survey"/>	<b>* Flow API Name</b> <input type="text" value="Survey"/>	
<b>Description</b> <input type="text"/>		
<a href="#">Hide Advanced</a>		
<b>How to Run the Flow</b> ⓘ <input type="text" value="User or System Context—Depends on How Flow is Launched"/>		
<b>Type</b> <input type="text" value="Screen Flow"/>		
<b>API Version for Running the Flow</b> <input type="text" value="51"/>		
<b>Interview Label</b> ⓘ <input type="text" value="Survey {!\$Flow.CurrentDateTime}"/>		
<b>Last Modified</b> 12/10/2023, 5:32 PM by Jeyakrishna G		
<b>Status:</b> <span style="background-color: green; color: white; border-radius: 50%; padding: 2px 5px; font-weight: bold;">Active</span>	<b>Type:</b> Screen Flow	<b>Version Number:</b> 2
		<a href="#">Cancel</a> <span style="margin-left: 10px; background-color: blue; color: white; border-radius: 5px; padding: 2px 10px; font-weight: bold;">Save</span>

## 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

Visualforce Page  
Survey

**Page Edit**

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

**Page Information**

Label: Survey  
Name: Survey  
Description:

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

Require CSRF protection on GET requests

**Visualforce Markup**

```

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

```

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

Now we will create a site to open the flow for unauthenticated access. 1.Click Setup.

2.In the Quick Find box, type Sites.

3.Clicks on the New button.

4.Fill the details as per the screenshot below:

5.Click Save.

**Site Edit**

**Save** **Cancel**

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

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.