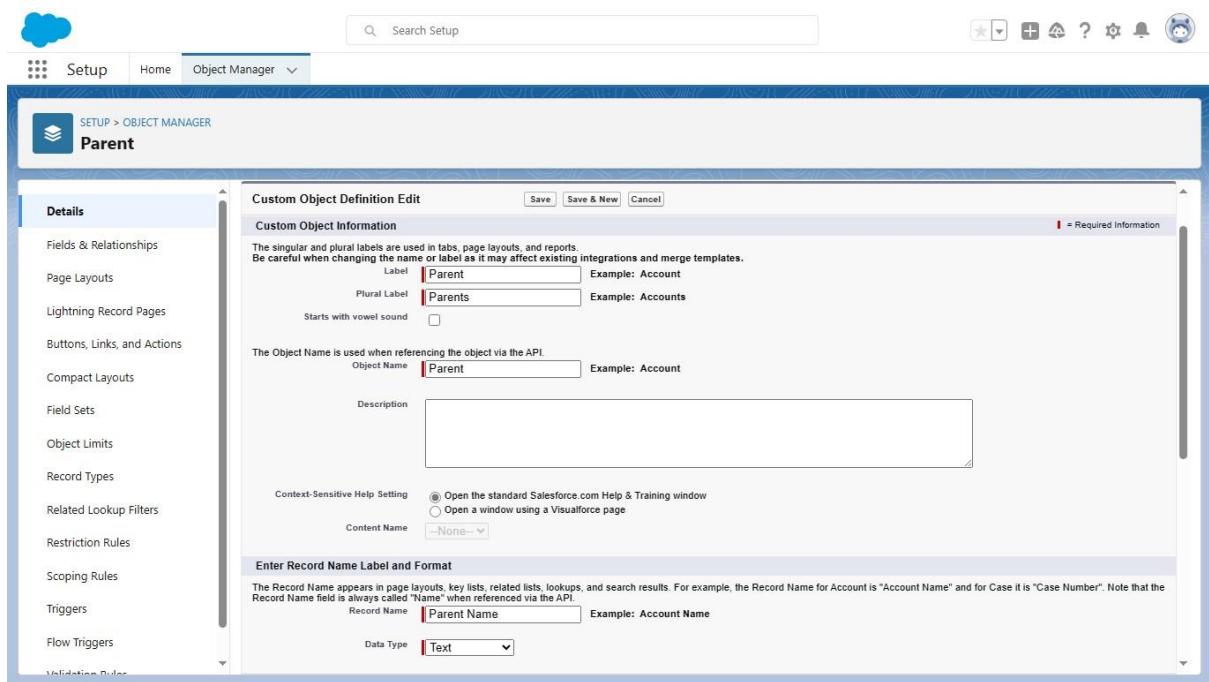


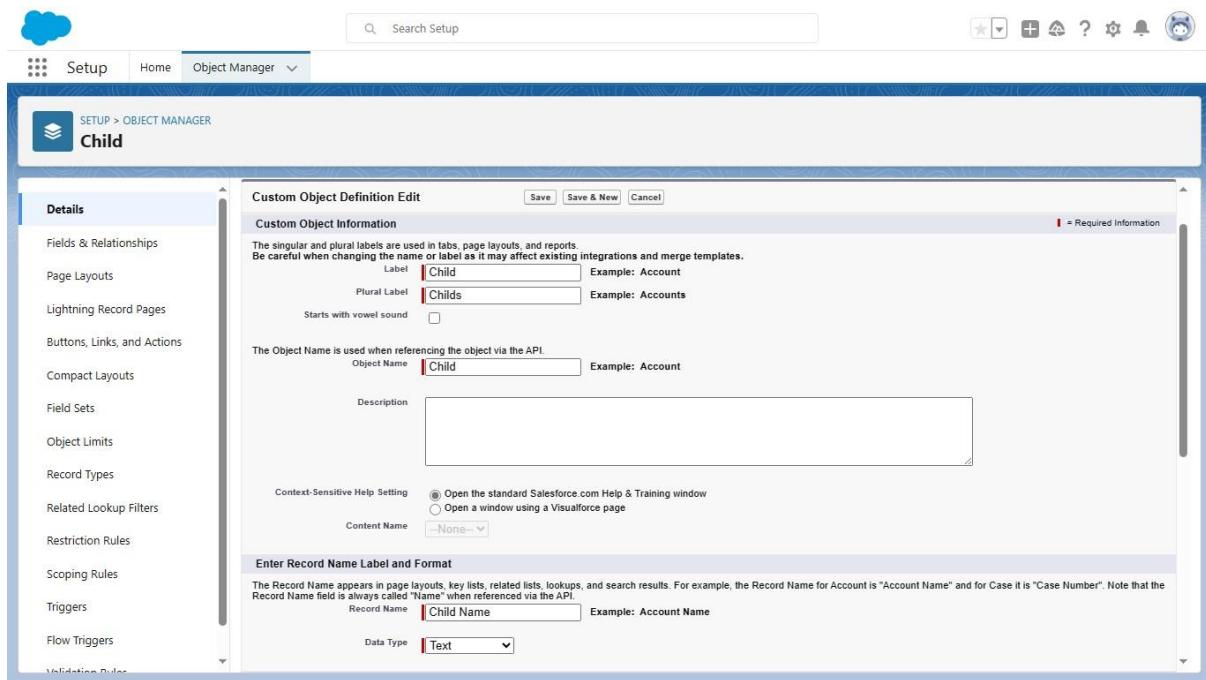
**NAAN MUDHALVAN**  
**Salesforce Developer(Course)**  
**Assignment no 1**

**NAME : SHANKAR M**  
**NAAN MUDHALVAN ID : AU611220244302**  
**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.**





## 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

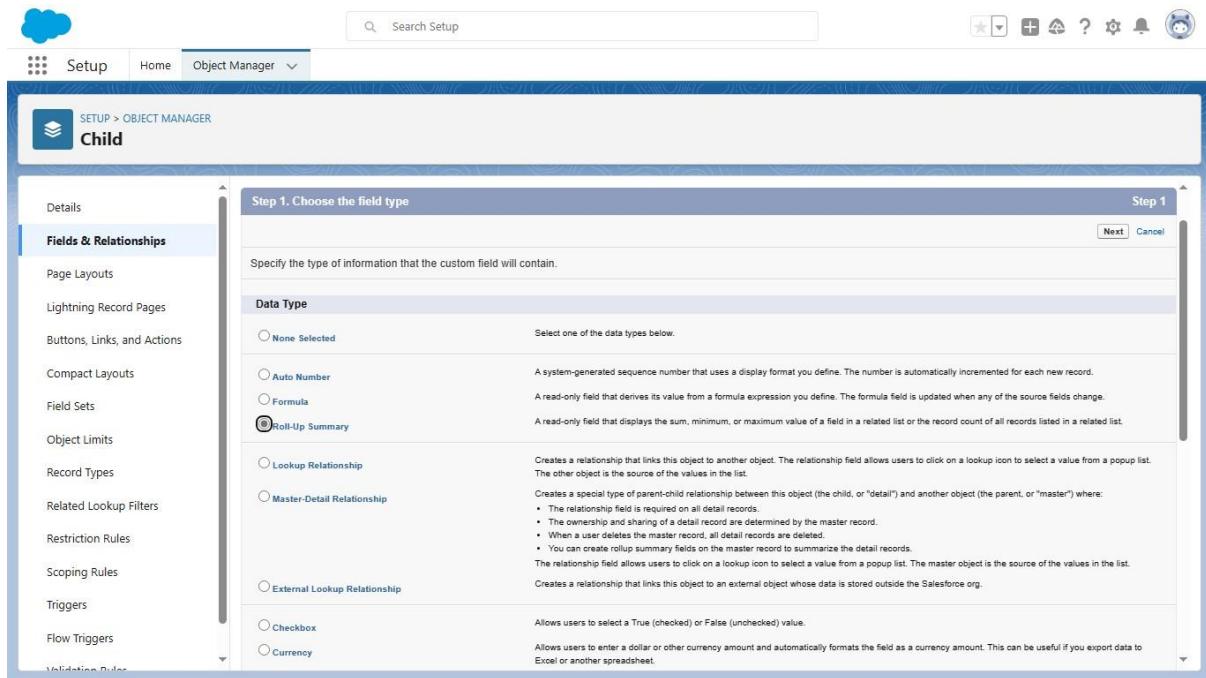
Setup Home Object Manager

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 note says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Object Tabs' and shows a table with columns for Action, Label, Tab Style, and Description. It lists four tabs: 'Brokers' (People style), 'Childs' (Lightning style), 'Parents' (Lightning style), and 'Properties' (Real Estate Sign style). Below this are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a note indicating 'No [tab type] have been defined'.

## STEP 4: UPDATE PAGE LAYOUTS AND RECORD TYPES (IF NECESSARY)

**DEPENDING ON YOUR USE CASE, YOU MAY WANT TO UPDATE PAGE LAYOUTS AND RECORD TYPES TO MAKE SURE THE NEW RELATIONSHIP AND FIELDS ARE DISPLAYED CORRECTLY TO YOUR USERS.**

**Lightning Experience App Manager**

App Name ↑	Developer Name	Description	Last Modified ...	Type	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, 11:17 am	Lightning	✓
5 Community	Community	Salesforce CRM Communities	22/08/2023, 11:15 am	Classic	✓
6 Content	Content	Salesforce CRM Content	22/08/2023, 11:15 am	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and man...	22/08/2023, 11:15 am	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/08/2023, 11:15 am	Lightning	✓
9 Dreamhouse	Dreamhouse		29/08/2023, 4:12 pm	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/08/2023, 11:15 am	Lightning	✓
11 Marketing	Marketing	Best-in-class on-demand marketing automation	22/08/2023, 11:15 am	Classic	✓
12 Platform	Platform	The fundamental Lightning Platform	22/08/2023, 11:15 am	Classic	✓
13 Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2023, 11:15 am	Lightning	✓
14 Sales	Sales	The world's most popular sales force automation (SFA) sol...	22/08/2023, 11:15 am	Classic	✓
15 Sales	LightningSales	Manage your sales process with accounts, leads, opportun...	22/08/2023, 11:15 am	Lightning	✓

**New Lightning App**

**App Details & Branding**

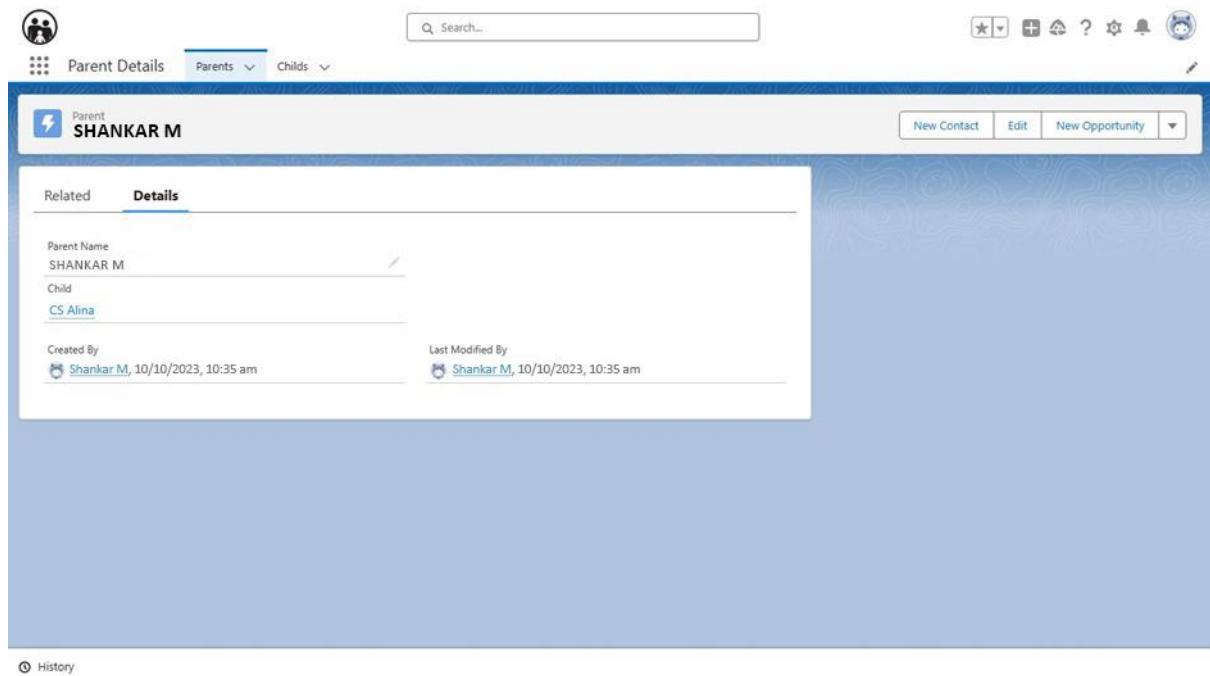
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

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

## STEP 5: TEST THE RELATIONSHIP AND ROLL-UP SUMMARY FIELD

**CREATE SOME RECORDS IN BOTH THE PARENT AND CHILD OBJECTS AND VERIFY THAT THE ROLL-UP SUMMARY FIELD CORRECTLY CALCULATES THE TOTAL NUMBER OF RELATED CHILD RECORDS ON THE PARENT RECORD.**

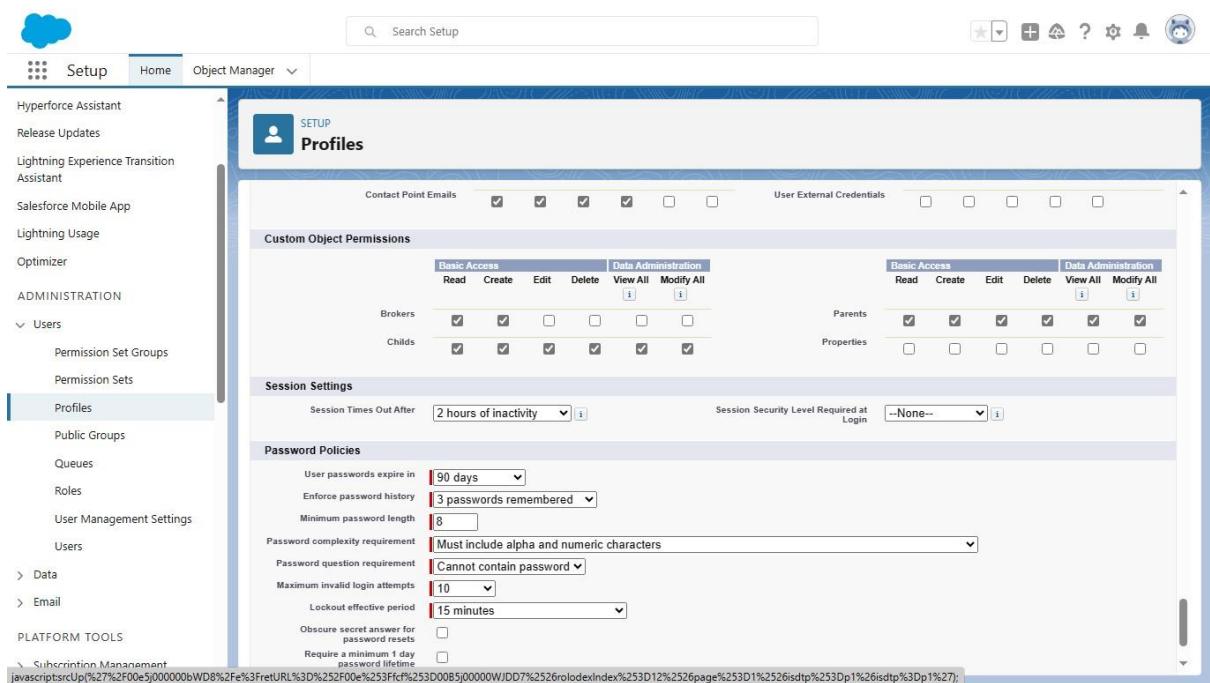
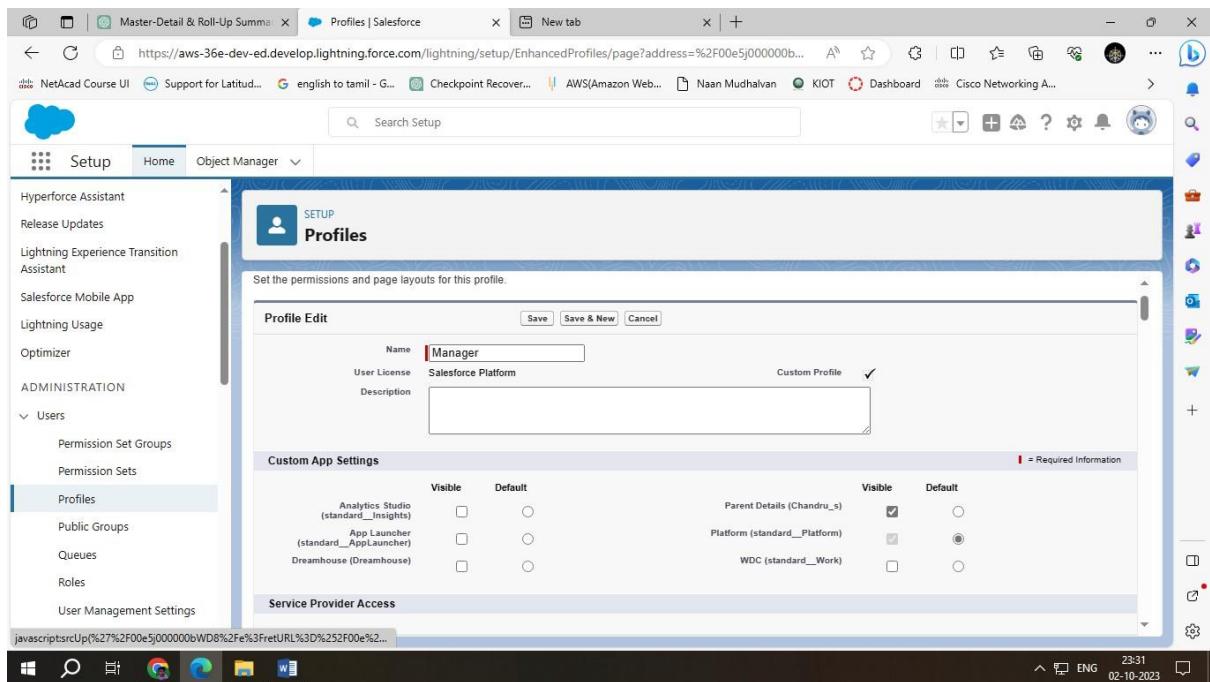
**THAT'S IT! YOU'VE SUCCESSFULLY CREATED A MASTER-DETAIL RELATIONSHIP BETWEEN TWO CUSTOM OBJECTS (PARENT AND CHILD) AND SET UP A ROLL-UP SUMMARY FIELD TO CALCULATE THE TOTAL NUMBER OF RECORDS IN THE CHILD OBJECT.**



**2. IF THERE IS 2 USER, USER A AND USER B IN THE ORGANISATION AND WE WANT IN ACCOUNT OBJECT THAT USER A SHOULD NOT SEE THE USER B RECORD AND USER B SHOULD NOT SEE USER A RECORD THEN APPLY TH SECURITY FOR THE USERS.**

**STEP 1: CREATE A PUBLIC GROUP**

- 1. GO TO "SETUP" IN SALESFORCE.**
- 2. IN THE QUICK FIND BOX, TYPE "PUBLIC GROUPS" AND SELECT IT.**
- 3. CLICK ON "NEW PUBLIC GROUP."**
- 4. CREATE A GROUP FOR USER A, LET'S CALL IT "USERA\_GROUP," AND ADD USER A TO THIS GROUP.**
- 5. CREATE ANOTHER GROUP FOR USER B, LET'S CALL IT "USERB\_GROUP," AND ADD USER B TO THIS GROUP.**



## STEP 2: CREATE CRITERIA-BASED SHARING RULES

**FOR USER A: 1. GO TO "SETUP" IN SALESFORCE.**

**2. IN THE QUICK FIND BOX, TYPE "SHARING RULES" AND SELECT "SHARING SETTINGS."**

**3. UNDER "ACCOUNT SHARING RULES," CLICK ON "NEW SHARING RULE."**

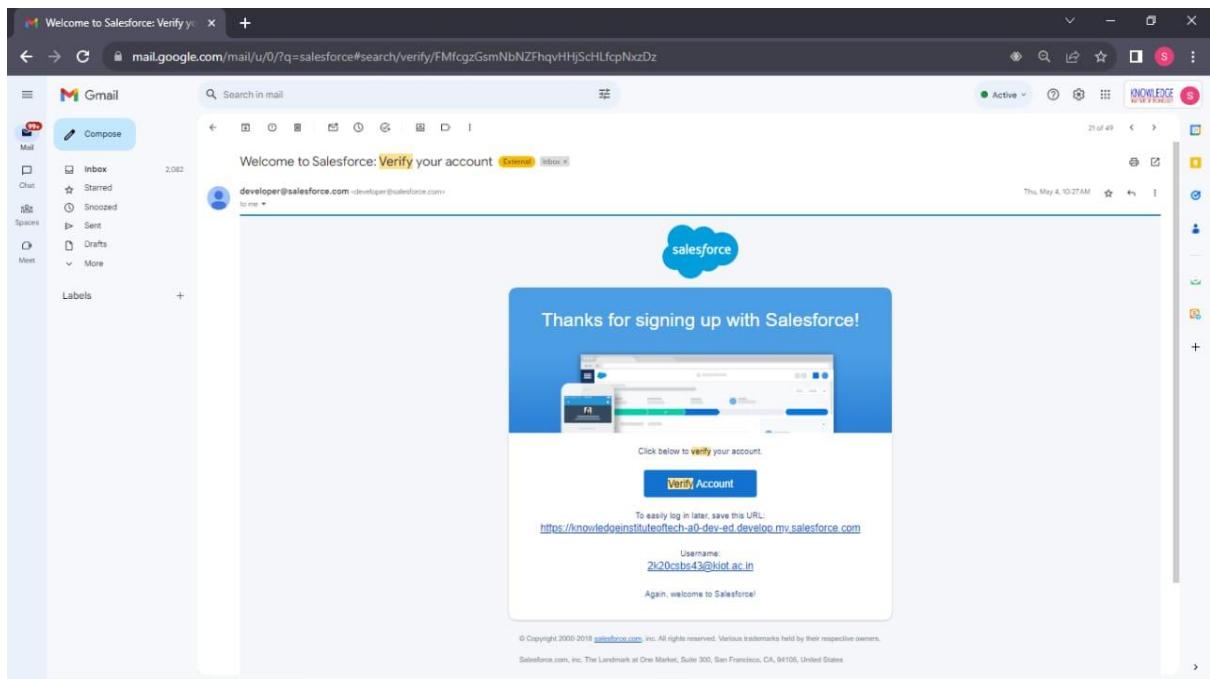
## **4. CREATE A RULE THAT SHARES RECORDS OWNED BY MEMBERS OF "USERB\_GROUP" WITH THE "USERA\_GROUP."**

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

## **6. SAVE THE SHARING RULE.**

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

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



The screenshot shows the "Change Your Password" page from Salesforce. At the top, there is a "salesforce" logo. Below it, the heading "Change Your Password" is displayed. The form asks for a new password, specifying requirements: "Enter a new password for 2k20csbs43@kiot.ac.in. Make sure to include at least:" followed by three checked items: "8 characters", "1 letter", and "1 number". The "New Password" field contains "....." and is labeled "Good". The "Confirm New Password" field contains "....." and is labeled "Match". A note "Caps Lock is on." appears next to the "Confirm New Password" field. Below these fields is a "Security Question" field containing "In what city were you born?". The answer "SALEM" is entered in the "Answer" field. At the bottom of the form is a large blue "Change Password" button.

## FOR USER B:

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

## **2. THIS RULE SHOULD SHARE RECORDS OWNED BY MEMBERS OF "USERA\_GROUP" WITH THE "USERB\_GROUP."**

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

## **4. SAVE THE SHARING RULE.**

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

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

## **STEP 3: ASSIGN RECORDS OWNERSHIP**

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. A new permission set is being created with the following details:

Field	Value
Label	permission
API Name	permission
Description	
Session Activation Required	<input type="checkbox"/>
Select the type of users who will use this permission set	
Will use this permission set?	-Choose '-None-' if you plan to assign this permission set to multiple users with different user and permission set licenses. -Choose a specific user license if you want users with only one license type to use this permission set. -Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
Not sure what a permission set license is? <a href="#">Learn more here.</a>	
License	--None--

**Permission Set**  
**permission**

Object Name Object Permissions Total Fields Tab Settings

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

**Permission Set**  
**permission**

Childs 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 checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

**Field Permissions**

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

Setup Home Object Manager

PERMISSION SET PERMISSION > MANAGE ASSIGNMENT EXPIRATION

### permission

Select Users to Assign

All Users

1 item selected

Full Name	Role	Username	Profile
Shankar M	CS	au611220244043@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".

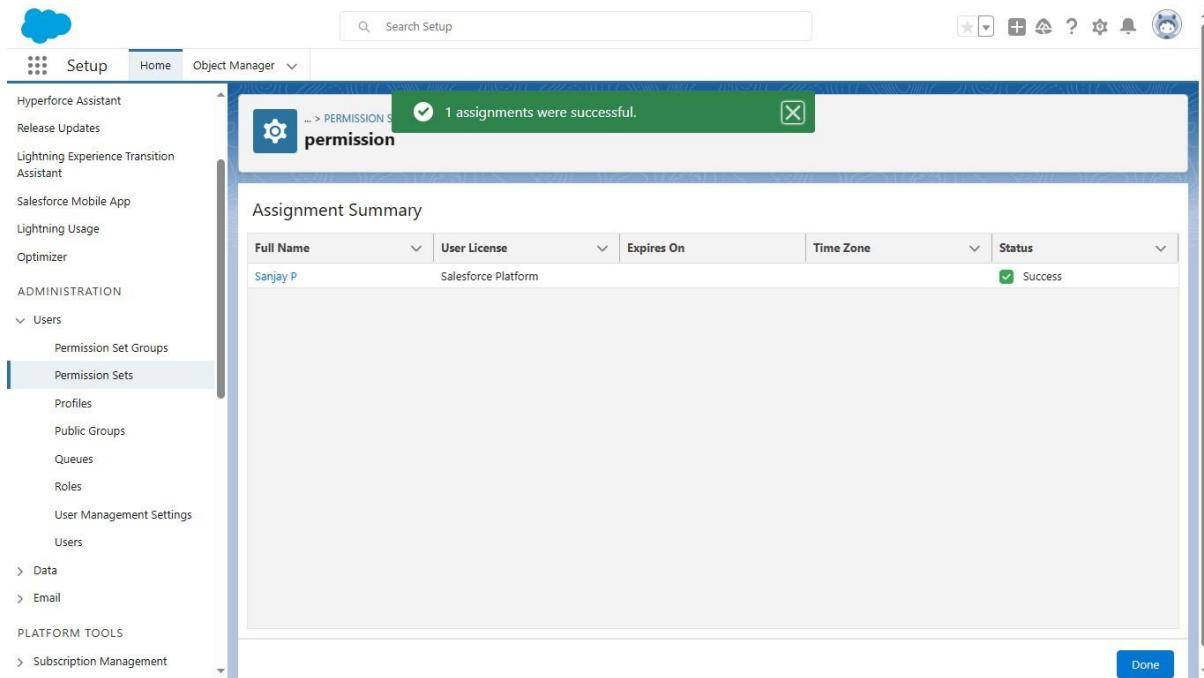
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>
  - Field Permissions:** A table with columns "Field Name", "Read 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). Breadcrumbs: "... > PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION".
- Section:** "Select Users to Assign".
- Buttons:** "All Users" dropdown, "Search this list..." input, 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
Shankar M	CS	au611220244043@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"/>	Edit A_Sunil	aa	2k21cse176@kiot.ac.in		<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Edit Chatter_Expert		chatty.00050000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit P_Sanay	aa	2k21cse171@kiot.ac.in		<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Edit Shankar M	CS	au611220244043@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit User_Integration	integ	integration@00050000000000000000000000000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit User_Security	ses	insightssecurity@00050000000000000000000000000000@salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Action	Profile Name	User License	Status
<input type="checkbox"/>	Edit   Clone Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Del ... Manager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Del ... Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit   Del ... Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit   Del ... Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>

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

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

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

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

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

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

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

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

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

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

The screenshot shows the Salesforce Lightning Experience. The left sidebar is titled 'ADMINISTRATION' and includes sections for 'Optimizer', 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Data', 'Email'. The 'Users' section is currently selected. The main content area is titled 'All Users' and displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users with their respective details and roles like Manager, Chatter Free User, System Administrator, etc.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the one in the top screenshot. The main content area is titled 'New User' and shows a 'User Edit' form under the 'General Information' tab. 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, Company (Male), Department, Division, Role (<None Specified>), User License (Salesforce Platform), Profile (chan), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (<None>), Data.com Monthly Additional Limit (Default Limit (300)), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, and Load Lightning Pages While.

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, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode, Debug Mode, and High-Contrast Palette on Charts. 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 'Email' field contains '2k20cse176@kiot.ac.in'.

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, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode, and High-Contrast Palette on Charts. The 'First Name' field is set to 'Sunil', 'Last Name' to 'A', 'Email' to '2k20cse176@kiot.ac.in', 'Username' to '2k21cse176@kiot.ac.in', and 'Nickname' to 'User169631476178576A938'. 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 'Email' field contains '2k21cse176@kiot.ac.in'.

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. The main content area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Two users are listed: 'A\_Sunil' with alias 'sa' and username '2k21cse176@kiot.ac.in', and another 'A\_Sunil' with alias 'sa' and username '2k23cse176@kiot.ac.in'. Both users have the role 'chan' and are marked as active.

## **STEP 2: ASSIGN THE PERMISSION SET TO THE USER NEEDING DELETE ACCESS**

- 1. IN THE "PERMISSION SET DETAIL" PAGE, CLICK ON "MANAGE ASSIGNMENTS."**
- 2. CLICK "ADD ASSIGNMENTS" AND SELECT THE USER WHO NEEDS DELETE ACCESS.**
- 3. SAVE THE ASSIGNMENT.**

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Help). The main content area displays a table of permission sets, with columns for Action, Permission Set Label, Description, and License. The table lists various permission sets such as Buyer, Buyer Manager, CRM User, Commerce Admin, Contact Center Admin, Contact Center Agent, Contact Center Supervisor, Experience Profile Manager, Facility Manager, FieldServiceMobileStandardPermSet, Merchandiser, Order Management Agent, Order Management Operations Manager, Order Management Shopper, and Order Management Shopper. The 'Description' column provides a brief overview of each permission set's functionality.

The screenshot shows the Salesforce Setup interface with the 'Edit Properties' screen for a permission set named 'permission01'. The top navigation bar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Help). The main content area displays the 'Edit Properties' dialog box, which includes fields for Label ('permission01'), API Name ('permission01'), Description, Session Activation Required (unchecked), and a Save button. Below the dialog, the 'App Permissions' section is visible, listing Apex Class Access, Visualforce Page Access, and External Data Source Access. The 'Permission Set Overview' section shows the API Name as 'permission01', Namespace Prefix as 'Chandru\_S', and Created By as 'Chandru S' on 03/10/2023, 1:59 pm.

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-links for Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and Help). The main content area is titled "Permission Sets" and shows a permission set named "permission01". It includes tabs for "Object Settings" (selected), "Accounts", "Contact", "Opportunity", and "Lead". Under "Object Permissions" for Accounts, all permissions (Read, Create, Edit, Delete, View All, Modify All) are disabled. Under "Field Permissions" for Accounts, "Account Name" has both Read Access and Edit Access checked; "Account Number", "Account Owner", and "Active" have both checked; while "Account Site", "Account Source", and "Annual Revenue" have neither checked. A "Video Tutorial | Help for this Page" link is at the top right.

This screenshot is identical to the one above, showing the "permission01" permission set in the Salesforce Setup interface. The "Object Settings" tab is selected, displaying the same permission and field settings for Accounts, Contact, Opportunity, and Lead objects. The "Edit" button is visible at the top of each section.

Setup Home Object Manager

All Users

2 items selected

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

Cancel Next

Setup Home Object Manager

No expiration date

Specify the expiration date

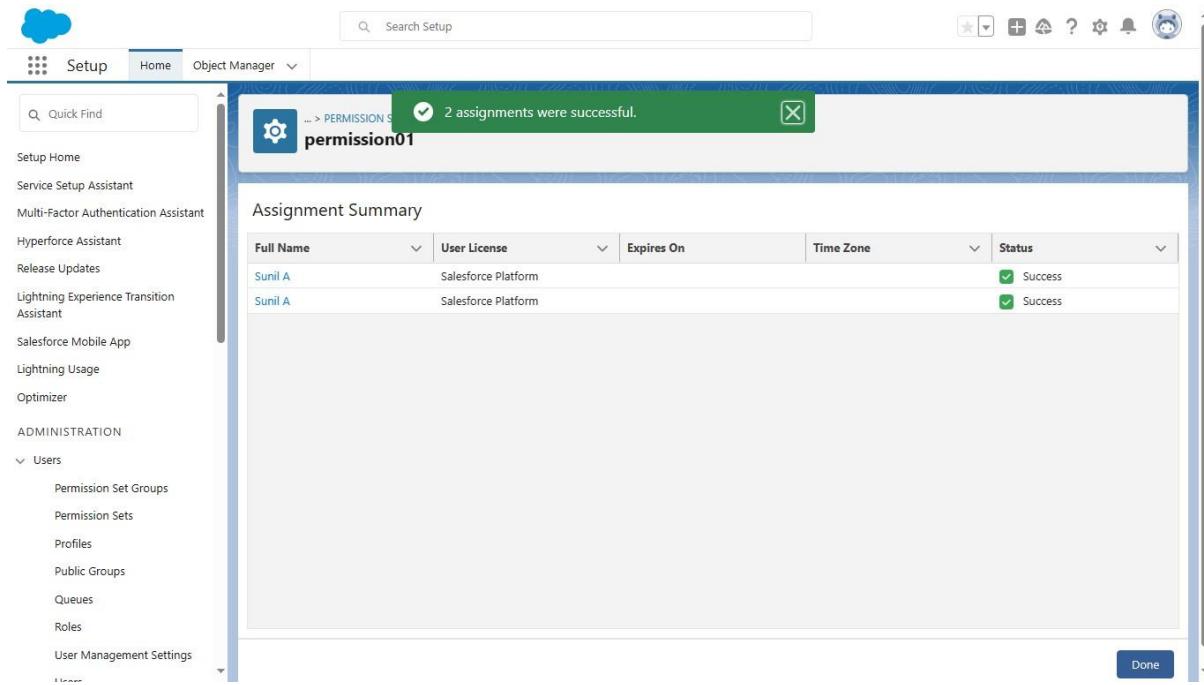
1 Day 1 Week 30 Days 60 Days Custom Date

Select a time zone...

Selected Users

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

Cancel Back Assign



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

### **STEP 1: CREATE A CUSTOM OBJECT**

**1. CLICK SETUP.**

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

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

**4. CLICK SAVE.**



SETUP > OBJECT MANAGER  
Survey Result

Details	Fields & Relationships				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Comment	Comment__c	Text Area(255)		▼
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Email	Email__c	Email		▼
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Name	Name__c	Text(51)		▼
Object Limits	Owner	OwnerId	Lookup(User,Group)	✓	
Record Types	Rating	Rating__c	Picklist		▼
Related Lookup Filters	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 Shankar M, 12/10/2023, 5: 32 PM	Last Modified By Shankar M, 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.

Edit Email Alert

Survey - Thank You Email

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

Email Alert Edit

Description: Survey - Thank You Email

Unique Name: Survey\_Thank\_You\_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for:

Recipients:

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

Add  Remove

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

Additional Emails

From Email Address: Current User's email address

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

Save Save & New Cancel

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

1.CLICK SETUP.

2.IN THE QUICK FIND BOX, TYPE FLOWS.

3.SELECT FLOWS THEN CLICK ON THE NEW FLOW.

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

5.HOW DO YOU WANT TO START BUILDING: FREEFORM

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

CANVAS.

**STEP 4.2: SALESFORCE FLOW – ADD A RECORD CREATE ELEMENT TO  
SAVE SURVEY RESPONSE**

1.DRAG-AND-DROP THE CREATE RECORDS ELEMENT ONTO THE FLOW DESIGNER. 2.ENTER A NAME IN THE LABEL (SAVE RESPONSE) FIELD; THE API NAME WILL AUTO-POPULATE.

3.FOR HOW MANY RECORDS TO CREATE – SELECT ONE.

4.FOR HOW TO SET THE RECORD FIELDS – SELECT USE SEPARATE RESOURCES, AND LITERAL VALUES.

5.SELECT THE SURVEY\_RESULT\_\_C OBJECT FROM THE DROPODOWN LIST.

6.SET FIELD VALUES FOR THE SURVEY RESULT

ROW 1:

FIELD: COMMENT\_\_C

VALUE: {!COMMENT}

CLICK ADD ROW

ROW 2:

FIELD: EMAIL\_\_C

VALUE: {!EMAIL.VALUE}

CLICK ADD ROW

ROW3:

FIELD: NAME\_\_C

VALUE: {!NAME.FIRSTNAME} {!NAME.LASTNAME}

CLICK ADD ROW

ROW 3:

FIELD: RATING\_\_C

VALUE: {!RATING}

7.CLICK DONE.

**Edit Create Records**

Create Salesforce records using values from the flow.

<b>*Label</b> <input type="text" value="Save Response"/>	<b>*API Name</b> <input type="text" value="Save_Response"/>
<b>Description</b> <input type="text"/>	
<b>How Many Records to Create</b> <input checked="" type="radio"/> One <input type="radio"/> Multiple	
<b>How to Set the Record Fields</b> <input type="radio"/> Use all values from a record <input checked="" type="radio"/> Use separate resources, and literal values	
<b>Create a Record of This Object</b>	
<b>*Object</b> <input type="text" value="Survey Result"/>	
<b>Set Field Values for the Survey Result</b>	
<b>Field</b> <input type="text" value="Comment__c"/>	<b>Value</b> <input type="text" value="A_a Comment X"/>
<b>Field</b> <input type="text" value="Email__c"/>	<b>Value</b> <input type="text" value="A_a Email &gt; Value X"/>
<b>Field</b> <input type="text" value="Name__c"/>	<b>Value</b> <input type="text" value="(!Name.firstName) (!Name.lastName)"/>
<b>Field</b> <input type="text" value="Rating__c"/>	<b>Value</b> <input type="text" value="A_a Rating X"/>
<input type="button" value="+ Add Field"/>	
<input type="checkbox"/> Manually assign variables	
<input type="button" value="Cancel"/> <input type="button" value="Done"/>	

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

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

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

#### 5.CLICK DONE.

Edit "Survey - Thank You Email" email alert

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

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

Save as

A New Version
A New Flow

* Flow Label	* Flow API Name	
Survey	Survey	
Description		
<div style="height: 50px; border: 1px solid #ccc; margin-bottom: 5px;"></div>		
<a href="#">Hide Advanced</a>		
<b>How to Run the Flow</b> ⓘ		
User or System Context—Depends on How Flow is Launched		
* Type		
Screen Flow		
* API Version for Running the Flow		
51		
<b>Interview Label</b> ⓘ		
Insert a resource...		
Survey {!\$Flow.CurrentDateTime}		
<div style="height: 50px; border: 1px solid #ccc; margin-top: 10px;"></div>		
<b>Last Modified</b> 12/10/2023, 5:32 PM by Shankar M		
Status:	Type:	Version Number:
Active	Screen Flow	2
		<input type="button" value="Cancel"/> <input type="button" value="Save"/>

## STEP 5: CREATE A LIGHTNING APPLICATION TO RENDER LIGHTNING RUNTIME FOR FLOW IN A VISUALFORCE PAGE

NOW WE WILL CREATE A LIGHTNING APPLICATION THAT DECLares A DEPENDENCY ON THE LIGHTNING:FLOW COMPONENT.

- 1.CLICK SETUP | DEVELOPER CONSOLE
- 2.NAVIGATE TO FILE | NEW | LIGHTNING APPLICATION
- 3.ENTER A NAME (VFPAGETOLC) FIELD, MAKE SURE TO SELECT THE LIGHTNING OUT DEPENDENCY APP CHECKBOX.
- 4.CLICK SUBMIT.
- 5.COPY CODE FROM GITHUB AND PASTE IT INTO YOUR LIGHTNING APPLICATION.
- 6.SAVE YOUR CODE.

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

VFPageToLC.app \*

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

Logs, Tests, and Problems

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

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

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

```
<apex:page showheader="false" lightningStylesheets="true">
<html>
<head>
<apex:includeLightning />
<!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualforce page-->
</head>
<body class="slds-scope">
<div id="flowContainer" />
<script>
var statusChange = function (event) {
if(event.getParam("status") === "FINISHED") {
var outputVariables = event.getParam("outputVariables");
var key;
for(key in outputVariables) {
if(outputVariables[key].name === "myOutput") {
}
}
}
};
$Lightning.use("c:VFPPageToLC", function() {
$Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
"flowContainer",
function (component) {
component.startFlow("Survey", );
}
);
});
</script>
</body>
```

## STEP 7: CREATE A FORCE.COM SITE TO OPEN YOUR FLOW FOR UNAUTHENTICATED ACCESS

NOW WE WILL CREATE A SITE TO OPEN THE FLOW FOR UNAUTHENTICATED ACCESS.

1. CLICK SETUP.
2. IN THE QUICK FIND BOX, TYPE SITES.
3. CLICKS ON THE NEW BUTTON.
4. FILL THE DETAILS AS PER THE SCREENSHOT BELOW:
5. CLICK SAVE.

**Site Edit**

**Save** **Cancel**

Site Label	Survey 
Site Name	Survey 
Site Description	    
Site Contact	Shankar M  
Default Record Owner	Shankar M  
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.**