

**NAAN MUDHALVAN**  
**Salesforce Developer (Course)**  
**Assignment**

**Name : DEEPA.J**

**NM USERNAME : au611420104012**

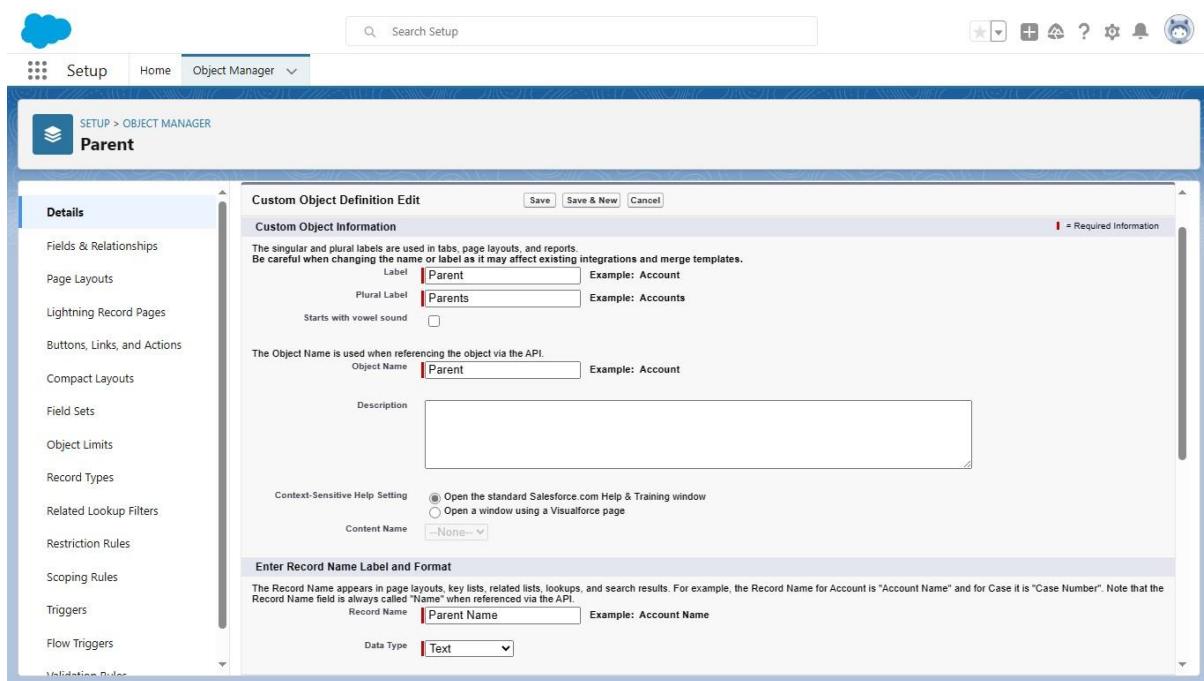
**Year & Dep : IV year &CSE**

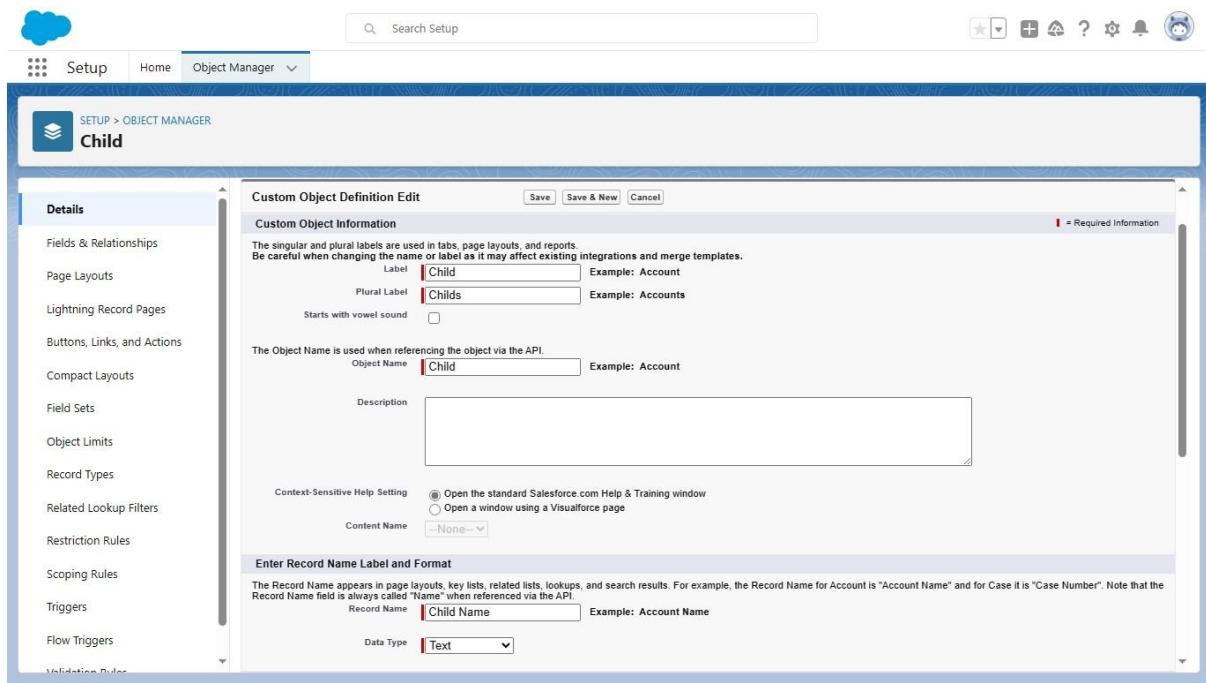
**Batch : 2024**

**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'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Parent'. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Lightning Record Pages', etc. The central area 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)		✓

The 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 title is 'Parent New Custom Field'. The first step, 'Step 1. Choose the field type', is displayed. The sub-header is 'Step 1'. 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.

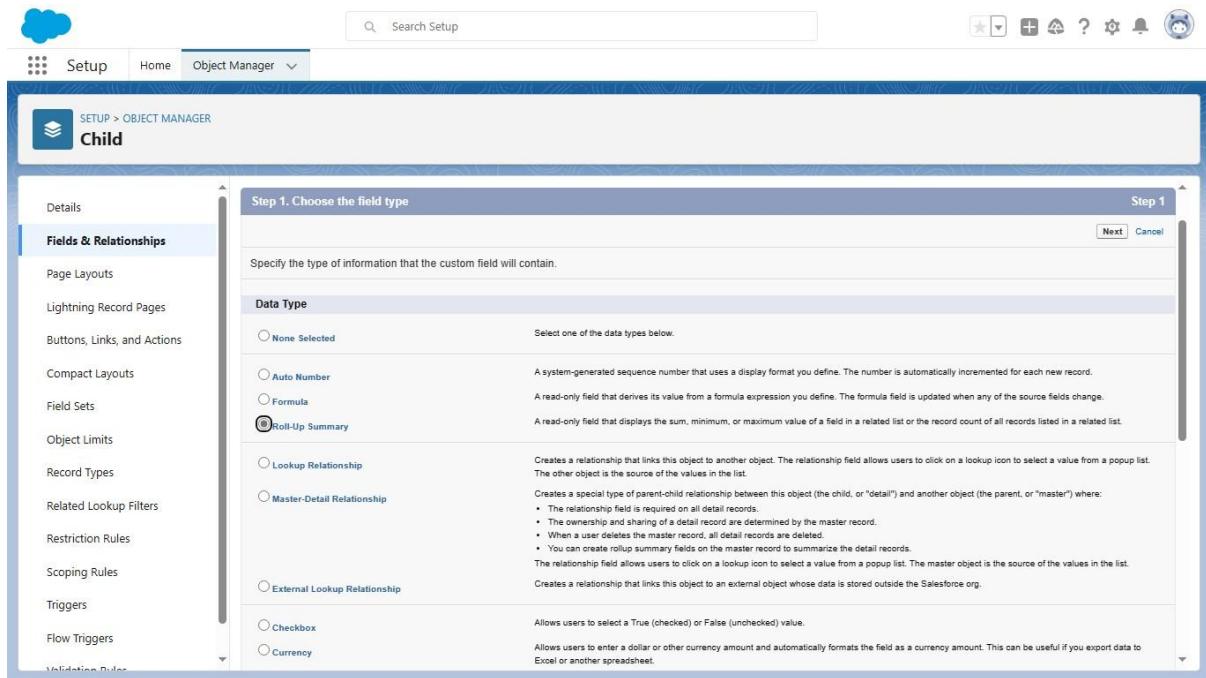
Buttons at the bottom right include 'Next' and 'Cancel'.

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' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various configuration options under 'Fields & Relationships'. The main content area is titled 'New Relationship' and 'Step 2. Choose the related object'. It asks 'Select the other object to which this object is related.' A dropdown menu shows 'Child' selected. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'. A help link 'Help for this Page' is in the top right corner.

The screenshot shows the Salesforce Setup interface for the 'Child' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Child' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various configuration options under 'Fields & Relationships'. The main content area is titled 'Fields & Relationships' and displays a table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows are:

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)		

Navigation buttons at the top right include 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. A help link 'Help for this Page' is in the top right corner.



## 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 message at the top says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Object Tabs' and lists tabs for 'Brokers', 'Childs', 'Parents', and 'Properties'. It also includes sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a note that 'No [tab type] have been defined'. The top navigation bar includes 'Search Setup', a magnifying glass icon, and various system icons.

## 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	Ap... ✓	Vi... ✓
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	22/08/2023, 11:15 am	Classic	✓	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/08/2023, 11:15 am	Classic	✓	✓
3 App Launcher	AppLauncher	App Launcher tabs	22/08/2023, 11:15 am	Classic	✓	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for you...	22/08/2023, 11:17 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	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**

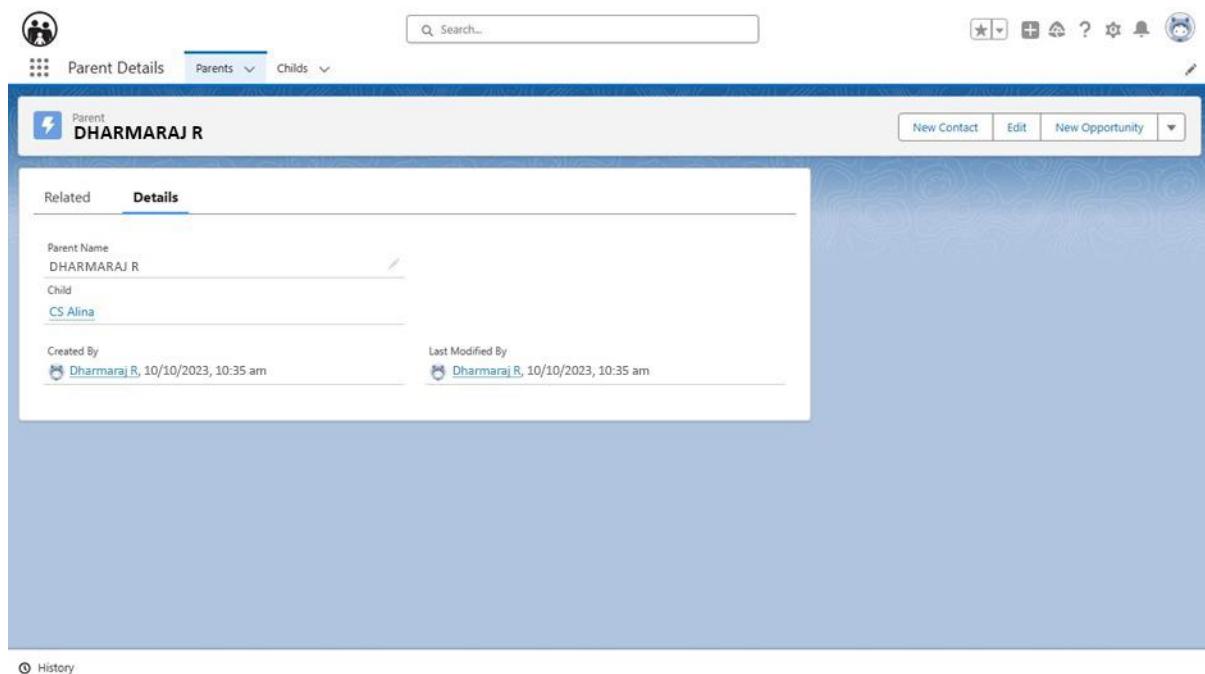
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

<b>App Details</b>	<b>App Branding</b>
* App Name <input type="text" value="Parent Details"/>	Image <input type="file"/> Primary Color Hex Value <input type="text" value="#0070D2"/>
* Developer Name <input type="text" value="Dharmaraj R"/>	
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"/> Salesforce Navigation <input type="radio"/> 13 Queue Management <input type="radio"/> 14 Sales <input type="radio"/> 15 Sales	

## 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.**

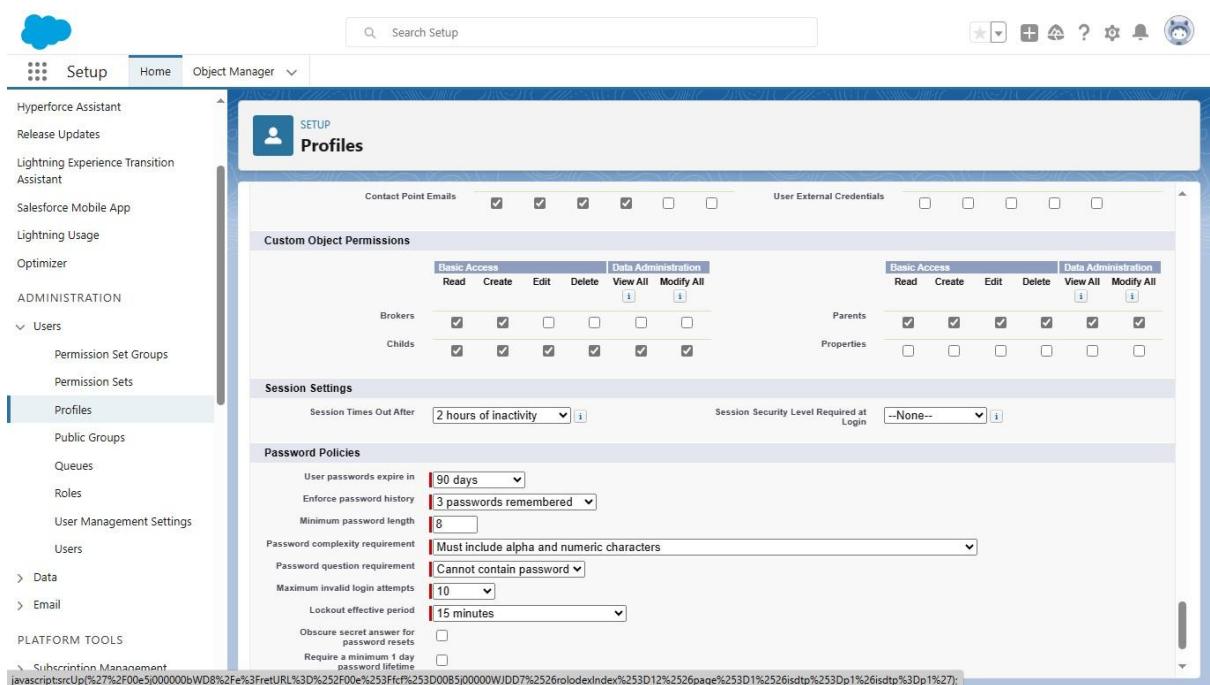
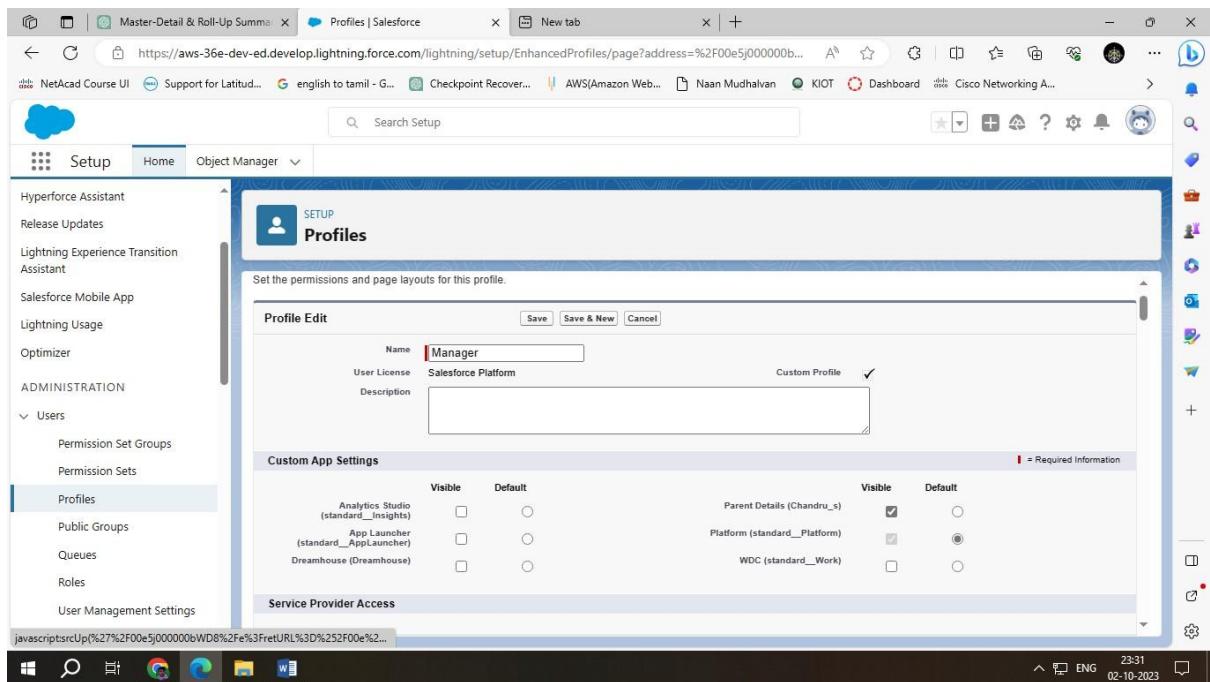
**That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.**



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

#### **Step 1: Create a Public Group**

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



## Step 2: Create Criteria-Based Sharing Rules

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

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

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

## 4. Create a rule that shares records owned by members of "UserB\_Group" with the "UserA\_Group."

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

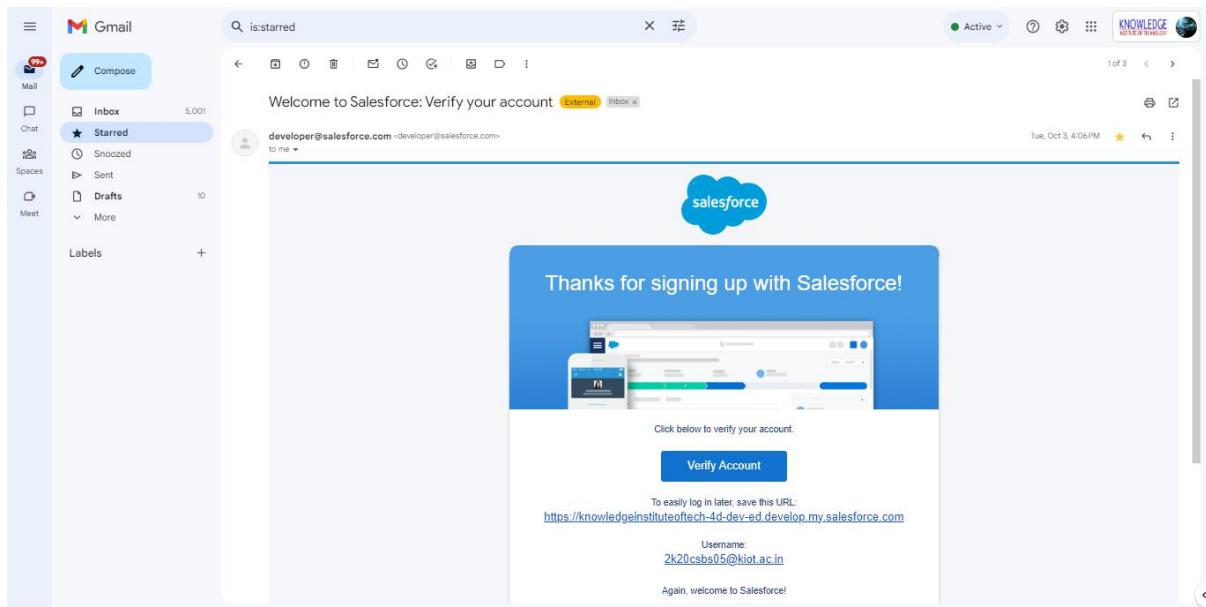
## 6. Save the sharing rule.

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

Field	Value
First Name	Sunil
Last Name	A
Alias	sa
Email	2k20cse176@kiot.ac.in
Username	2k21cse176@kiot.ac.in
Nickname	User169631476178576A9381
Title	
Company	Male
Department	
Division	
Role	<None Specified>
User License	Salesforce Platform
Profile	Manager
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	-None--
Data.com Monthly Addition Limit	Default Limit (300)
Accessibility Mode (Classic Only)	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>
Load Lightning Pages While	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The details of the user 'Sunil A' are displayed:

Field	Value
Name	Sunil A
Alias	sa
Email	2k20cse176@kiot.ac.in [Verify]
Username	2k21cse176@kiot.ac.in
Nickname	User169631476178576A9381
Title	
Company	Male
Department	
Division	
Address	2/73 Kolankonda(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
Federation ID	
Role	
User License	Salesforce Platform
Profile	Manager
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	
Data.com Monthly Addition Limit	
Accessibility Mode (Classic Only)	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>
Load Lightning Pages While	<input type="checkbox"/>



A screenshot of a "Change Your Password" form. The form asks for a new password that includes at least 8 characters, 1 letter, and 1 number. It includes fields for "New Password" (containing "....." and a "Good" feedback message) and "Confirm New Password" (containing "....." and a "Match" feedback message). It also includes a note about Caps Lock being on. The "Security Question" field contains "In what city were you born?" and the "Answer" field contains "SALEM". A "Change Password" button is at the bottom.

Enter a new password for 2k20csbs05@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**

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

**Contacts**

	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Push Topics**

	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Custom Object Permissions**

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

**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

**Password Policies**

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

## For User B:

**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.**

New User

User Edit

General Information

First Name	Sanjay	Role	<None Specified>
Last Name	P	User License	Salesforce Platform
Alias	sp	Profile	Bmanager
Email	2k20cse171@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	2k22cse171@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User1696315620912300622	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		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 Addition Limit	Default Limit (300)
		Accessibility Mode (Classic or Org)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While	<input type="checkbox"/>

## Step 3: Assign Records Ownership

Permission Set

Create

Enter permission set information

Label	permission
API Name	permission
Description	(empty)

Session Activation Required

Select the type of users who will use this permission set

Who 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? [Learn more here.](#)

License -None--

Save Cancel

Setup Home Object Manager

## Permission Sets

**Object Settings**

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

Setup Home Object Manager

## Permission Sets

**Childs**

**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 checked="" 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
Dharmaraj R	CS	au811220244005@naanmudhalvan.com	System Administrator

Search this list...

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 ①

Specify the expiration date ①

Time Zone

1 Day 1 Week 30 Days 60 Days Custom Date

Selected Users

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

Cancel Back Assign

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

Setup Home Object Manager

Hyperforce Assistant  
Release Updates  
Lightning Experience Transition Assistant  
Salesforce Mobile App  
Lightning Usage  
Optimizer  
**ADMINISTRATION**  
Users  
    Permission Set Groups  
    Permission Sets  
    Profiles  
    Public Groups  
    Queues  
    Roles  
    User Management Settings  
    Users  
    > Data  
    > Email  
PLATFORM TOOLS  
    > Subscription Management

... > PERMISSION SETS permission

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Sunil A	Salesforce Platform			<input checked="" type="checkbox"/> Success

Done

Search Setup

1 assignments were successful.

Setup Home Object Manager

Hyperforce Assistant  
Release Updates  
Lightning Experience Transition Assistant  
Salesforce Mobile App  
Lightning Usage  
Optimizer  
**ADMINISTRATION**  
Users  
    Permission Set Groups  
    **Permission Sets**  
    Profiles  
    Public Groups  
    Queues  
    Roles  
    User Management Settings  
    Users  
    > Data  
    > Email  
PLATFORM TOOLS  
    > Subscription Management

SETUP Permission Sets

Operating Hours Holidays

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

javascript:srcSelf("%2FOPSS%000007Uxo%3Fs%3DentityPermissions%26o%3D0115...")

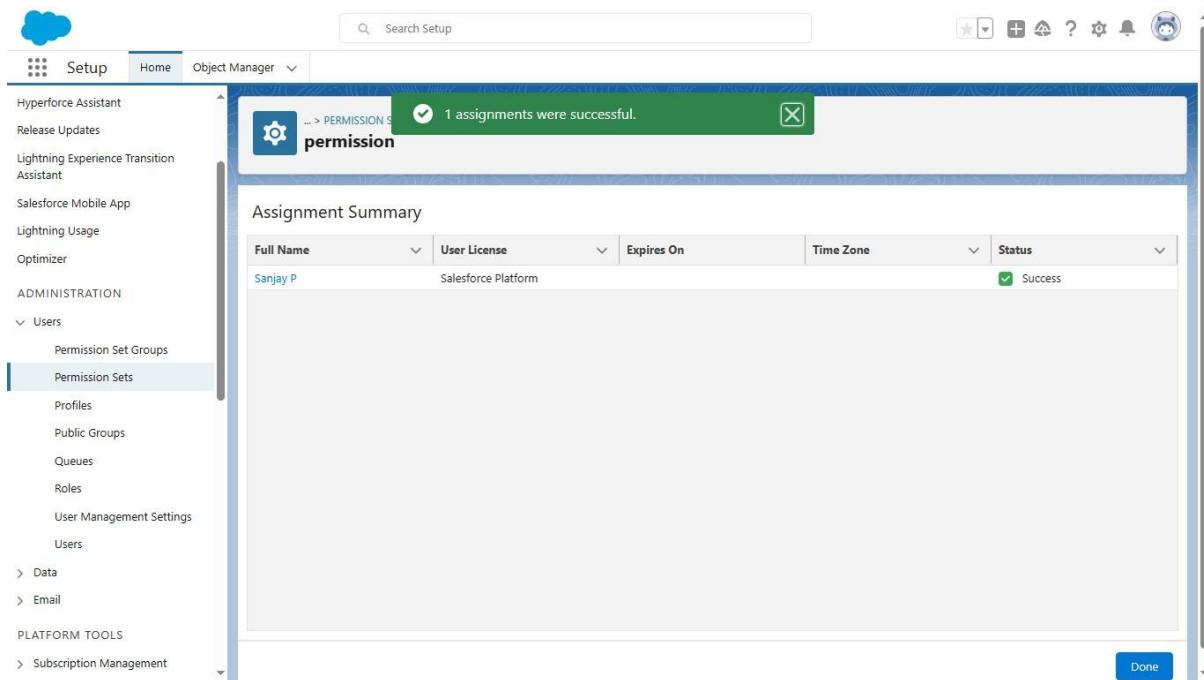
Search Setup

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

- Left Sidebar:** Shows the navigation menu under "ADMINISTRATION" with "Users" expanded, showing "Permission Set Groups" and "Permission Sets".
- Header:** "Search Setup" and various setup icons.
- Page Title:** "SETUP Permission Sets permission"
- Section:** "Permission Set Overview > Object Settings > Parents"
- Parents Tab:** "Save" and "Cancel" buttons.
- Tab Settings:** A table with columns "Available" and "Visible". Under "Available", there is one row with a checkbox. Under "Visible", there is one row with a checkbox and a "Edit" icon.
- Object Permissions:** A table with columns "Permission Name" and "Enabled". Rows include Read (Enabled), Create (Enabled), Edit (Not Enabled), Delete (Not Enabled), View All (Not Enabled), and Modify All (Not Enabled).
- Field Permissions:** A table with columns "Field Name", "Read Access", and "Edit Access". Rows include Child (Read Access Not Enabled, Edit Access Not Enabled) and Created By (Read Access Enabled, Edit Access Not Enabled).

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

- Left Sidebar:** Shows the navigation menu under "ADMINISTRATION" with "Users" expanded, showing "Permission Set Groups" and "Permission Sets".
- Header:** "Search Setup" and various setup icons.
- Page Title:** "SETUP permission ... > PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION"
- Section:** "Select Users to Assign"
- Section Header:** "All Users ▾"
- Table:** A list of users with columns: Full Name, Alias, Username, Role, Access, and Profile. One user, "Sanjay P.", has a checked checkbox in the "Access" column.
- Buttons:** "Cancel" and "Next" at the bottom right.



**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.

The screenshot shows the Salesforce 'Users' page under the 'SETUP' tab. The left sidebar navigation includes 'Optimizer', 'ADMINISTRATION' (with 'Users' selected), 'Queues', 'Roles', 'User Management Settings', 'PLATFORM TOOLS' (with 'Subscription Management' selected), and 'Einstein'. The main content area displays a table titled 'All Users' with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users with their respective details and assigned roles like Manager, System Administrator, etc.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit A_Sunil	SA	2k21cs6176@kiot.ac.in	Manager	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Edit Chatter_Expert	Chatter	chatty.00050000000000000000000000000000@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Edit P_Sanjay	SR	2k22cs6171@kiot.ac.in	Manager	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Edit DhammrajR	CS	au611220244005@maannmudhalvan.com	System Administrator	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Edit User_Integration	integ	integration@00050000000000000000000000000000@salesforce.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Edit User_Security	ses	insightssecurity@00050000000000000000000000000000@salesforce.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	

The screenshot shows the Salesforce 'Profiles' page under the 'SETUP' tab. The left sidebar navigation includes 'Optimizer', 'ADMINISTRATION' (with 'Profiles' selected), 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'PLATFORM TOOLS' (with 'Subscription Management' selected), and 'Einstein'. The main content area displays a table titled 'Profiles' with columns: Action, Profile Name, User License, and Custom. The table lists various profiles such as Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, etc., along with their assigned user licenses.

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Edit   Clone Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit   Del ... Bmanager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit   Clone Chatter_External 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 with the 'Profiles' tab selected under 'ADMINISTRATION / Users'. A modal window titled 'Clone Profile' is open, prompting the user to enter the name of the new profile ('Manager') and select an existing profile to clone from ('Standard Platform User').

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under 'ADMINISTRATION / Users'. The 'Profile Detail' screen for the 'chan' profile is displayed, showing its name ('chan'), user license ('Salesforce Platform'), and creation details ('Created By: Chandru S. 03/10/2023, 1:50 pm'). The 'Page Layouts' section lists various standard object layouts assigned to the profile.

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

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

**Left Sidebar:**

- 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
- Help

**Top Bar:**

- Cloud icon
- Search bar: Search Setup
- Setup icon
- Home icon
- Object Manager icon
- Star icon
- Plus icon
- Cloud icon
- Question mark icon
- Gear icon
- Bell icon
- User icon

**Content Area:**

## SETUP Profiles

**Basic Access**

	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**

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

Buttons: Save, Save & New, Cancel

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

**Left Sidebar:**

- 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
- Help

**Top Bar:**

- Cloud icon
- Search bar: Search Setup
- Setup icon
- Home icon
- Object Manager icon
- Star icon
- Plus icon
- Cloud icon
- Question mark icon
- Gear icon
- Bell icon
- User icon

**Content Area:**

## SETUP Profiles

**Profile Edit**  
chan

Set the permissions and page layouts for this profile.

**Profile Edit**

Name	Save	Save & New	Cancel
chan			
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
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	<input checked="" type="checkbox"/>

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

The page title is 'Users | Salesforce'. The URL is <https://aws-36e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home>.

The left sidebar shows the navigation menu:

- 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

The main content area displays the 'All Users' list:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A_Sunil	sa	2k2cse176@kiot.ac.in	<input checked="" type="checkbox"/>	✓	Manager
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d500000cismgean.eodfzlkibsr@chatter.salesforce.com	<input checked="" type="checkbox"/>	✓	Chatter Free User
<input type="checkbox"/>	P_Sanjay	sp	2k2cse171@kiot.ac.in	<input checked="" type="checkbox"/>	✓	Bmanager
<input type="checkbox"/>	S_Chandru	CS	su611220104303@naanmudhalvan.com	<input checked="" type="checkbox"/>	✓	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00d500000cismgean.com	<input checked="" type="checkbox"/>	✓	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d500000cismgean.com	<input checked="" type="checkbox"/>	✓	Analytics Cloud Security User

Buttons at the top of the list: New User, Reset Password(s), Add Multiple Users.

Buttons at the bottom of the list: New User, Reset Password(s), Add Multiple Users.

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

The page title is 'Setup'. The URL is [https://aws-36e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home](#).

The left sidebar shows the navigation menu:

- 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

The main content area displays the 'New User' form:

**User Edit** (Save, Save & New, Cancel)

**General Information** (Required Information: \*)

First Name	Sunil	Role	<None Specified>
Last Name	A	User License	Salesforce Platform
Alias	sa	Profile	chan
Email	2k2cse176@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	2k2cse176@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 Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "ADMINISTRATION" and includes sections for "Users" (selected), "Data", "Email", "PLATFORM TOOLS", "Subscription Management", "Apps", "Feature Settings", "Slack", "MuleSoft", and "Einstein". The main content area is titled "User Sunil A" and displays the "User Detail" page. The user's name is Sunil A, with alias sa, email 2k20cse176@kiot.ac.in, and active status. The role is "Salesforce Platform" and the profile is "chan". Other details include department (2/3), division (Malasamudram 637503), address (Tamil Nadu India), time zone (GMT+05:30) India Standard Time (Asia/Kolkata), locale (English (India)), language (English), and delegated approver (Manager). The "Receive Approval Request Emails" field is set to "Only if I am an approver". The "Performer ID" field is empty.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous one. The main content area is titled "User Edit Sunil A" and displays the "User Edit" page. The user's first name is Sunil, last name is A, alias is sa, email is 2k20cse176@kiot.ac.in, and active status is checked. The role is "**<None Specified>**" and the profile is chan. Other fields include company (Male), department (Blank), division (Blank), and various checkboxes for user types like Marketing User, Offline User, Knowledge User, etc. The "Data.com User Type" dropdown is set to "-None-". The "Data.com Monthly Addition Limit" is set to 300. The "Accessibility Mode (Classic Only)" and "High-Contrast Palette on Charts" checkboxes are unchecked.

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, Administration, and Users. The main content area is titled "SETUP Users" and displays the "All Users" list. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Two users are listed: "A\_Sunil" (alias s8, username 2k21cse176@kiot.ac.in) and "A\_Sunil" (alias s8, username 2k23cse176@kiot.ac.in). Both users have their "Active" status checked and are assigned to the "chan" profile.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	A_Sunil	s8	2k21cse176@kiot.ac.in		✓	chan
<input type="checkbox"/>   Edit	A_Sunil	s8	2k23cse176@kiot.ac.in		✓	chan

## 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 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 (with sub-links for Users, Permission Set Groups, and Permission Sets). The main content area displays a table of permission sets, with the 'Buyer' row selected. The table columns include Action, Permission Set Label, Description, and License.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and ca...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Ama...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, subloca...	Salesforce
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mo...	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Agent	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Limited access to Order Management features for Self Ser...	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper		

The screenshot shows the 'Edit Properties' dialog for a permission set named 'permission01'. The dialog fields include Label ('permission01'), API Name ('permission01'), and Session Activation Required (unchecked). The 'Edit Properties' button is at the bottom right. The background shows the 'Permission Set Overview' section of the 'Permission01' page, which includes fields for Description, License, Namespace Prefix, Created By, and Last Modified By.

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

(permission01)

Object Manager

Search Setup

Clone | Delete | Edit Properties | Manage Assignments

Video Tutorial | Help for this Page

Accounts

Object Permissions

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

Field Permissions

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

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

(permission01)

Object Manager

Search Setup

Clone | Delete | Edit Properties | Manage Assignments

Video Tutorial | Help for this Page

Accounts

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"/>

Setup Home Object Manager

All Users

2 items selected

Full Name	Role	Username	Profile
Dharmaraj R	CS	au611220244005@naanmudhalvan.com	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzikibsr@chatter.salesforce.com	Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	Analytics Cloud Integration User
Sanjay P	sp	2k22cse171@kiot.ac.in	Bmanager
Security User	sec	insightssecurity@00d5j00000cismqean.com	Analytics Cloud Security User
Sunil A	sa	2k21cse176@kiot.ac.in	chan
Sunil A	sa	2k23cse176@kiot.ac.in	chan

Cancel Next

Setup Home Object Manager

No expiration date

Specify the expiration date

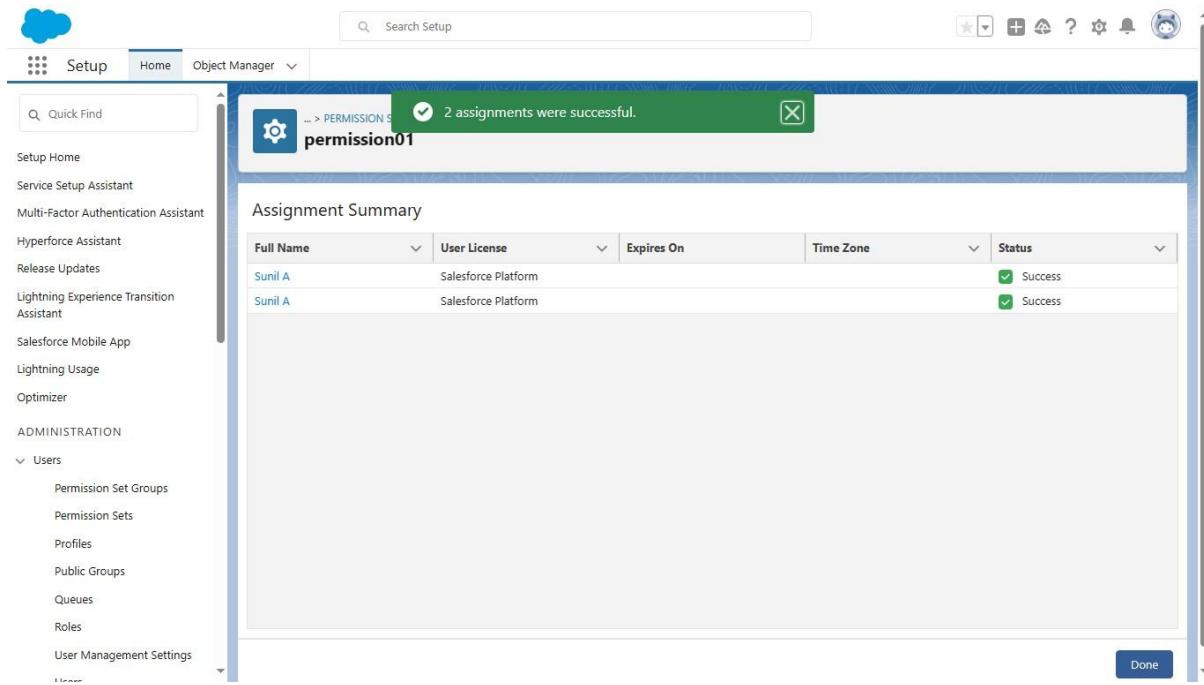
1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Sunil A	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.

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 <a href="#">Dharmaraj R</a> , 12/10/2023, 5: 32 PM	Last Modified By <a href="#">Dharmaraj R</a> , 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 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 drop-down list.
- 6.Set Field Values for the Survey Result

Row 1:

Field: Comment\_\_c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email\_\_c

Value: {!Email.value}

Click Add Row

Row3:

Field: Name\_\_c

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

Click Add Row

Row 3:

Field: Rating\_\_c

Value: {!Rating}

7.Click Done.

**Edit Create Records**

Create Salesforce records using values from the flow.

* Label	* API Name																				
Save Response	Save_Response																				
Description																					
<p>How Many Records to Create</p> <input checked="" type="radio"/> One <input type="radio"/> Multiple																					
<p>How to Set the Record Fields</p> <input type="radio"/> Use all values from a record <input checked="" type="radio"/> Use separate resources, and literal values																					
<p><b>Create a Record of This Object</b></p> <p>* Object</p> <input type="text" value="Survey Result"/>																					
<p><b>Set Field Values for the Survey Result</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Field</td> <td style="width: 50%;">Value</td> </tr> <tr> <td>Comment__c</td> <td>← A_a Comment X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Email__c</td> <td>← A_a Email &gt; Value X</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Name__c</td> <td>← {!Name.firstName} {!Name.lastName}</td> </tr> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Rating__c</td> <td>← A_a Rating X</td> </tr> <tr> <td colspan="2"> <input type="button" value="+ Add Field"/> </td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Manually assign variables         </td> </tr> </table>		Field	Value	Comment__c	← A_a Comment X	Field	Value	Email__c	← A_a Email > Value X	Field	Value	Name__c	← {!Name.firstName} {!Name.lastName}	Field	Value	Rating__c	← A_a Rating X	<input type="button" value="+ Add Field"/>		<input type="checkbox"/> Manually assign variables	
Field	Value																				
Comment__c	← A_a Comment X																				
Field	Value																				
Email__c	← A_a Email > Value X																				
Field	Value																				
Name__c	← {!Name.firstName} {!Name.lastName}																				
Field	Value																				
Rating__c	← 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					
<div style="border: 1px solid #ccc; height: 40px; margin-bottom: 10px;"></div>					
<b>Set Input Values</b>					
<table border="1"><tr><td>A_a</td><td>* Record ID</td></tr><tr><td colspan="2">{!Save_Response}</td></tr></table>		A_a	* Record ID	{!Save_Response}	
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 **Survey**

\* Flow API Name **Survey**

Description

[Hide Advanced](#)

How to Run the Flow [?](#)

User or System Context—Depends on How Flow is Launched

\* Type **Screen Flow**

\* API Version for Running the Flow **51**

Interview Label [?](#)

Insert a resource...

Survey {!\$Flow.CurrentDateTime}

Last Modified  
12/10/2023, 5:32 PM by Dharmaraj R

Status: <b>Active</b>	Type: <b>Screen Flow</b>	Version Number: <b>2</b>
-----------------------	--------------------------	--------------------------

**Cancel** **Save**

## Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a Visualforce Page

Now we will create a Lightning Application that declares a dependency on the lightning:flow component.

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

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

VFPageToLC.app \*

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

Logs, Tests, and Problems

```

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

```

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

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

1.Click Setup.

2.In the Quick Find box, type Sites.

3.Clicks on the New button.

4.Fill the details as per the screenshot below:

5.Click Save.

**Site Edit**

**Save** **Cancel**

Site Label	Survey 
Site Name	Survey 
Site Description	    
Site Contact	Dharmaraj R  
Default Record Owner	Dharmaraj R  
Default Web Address	http://katihar-developer-edition.gus.force.com/ survey 
Active	<input checked="" type="checkbox"/> 
Active Site Home Page	Survey  
Inactive Site Home Page	InMaintenance  
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.