

NAAN MUDHALVAN

Salesforce Developer (Course)

Assignment

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Year & Dep : IV year & CSE

Batch : 2024

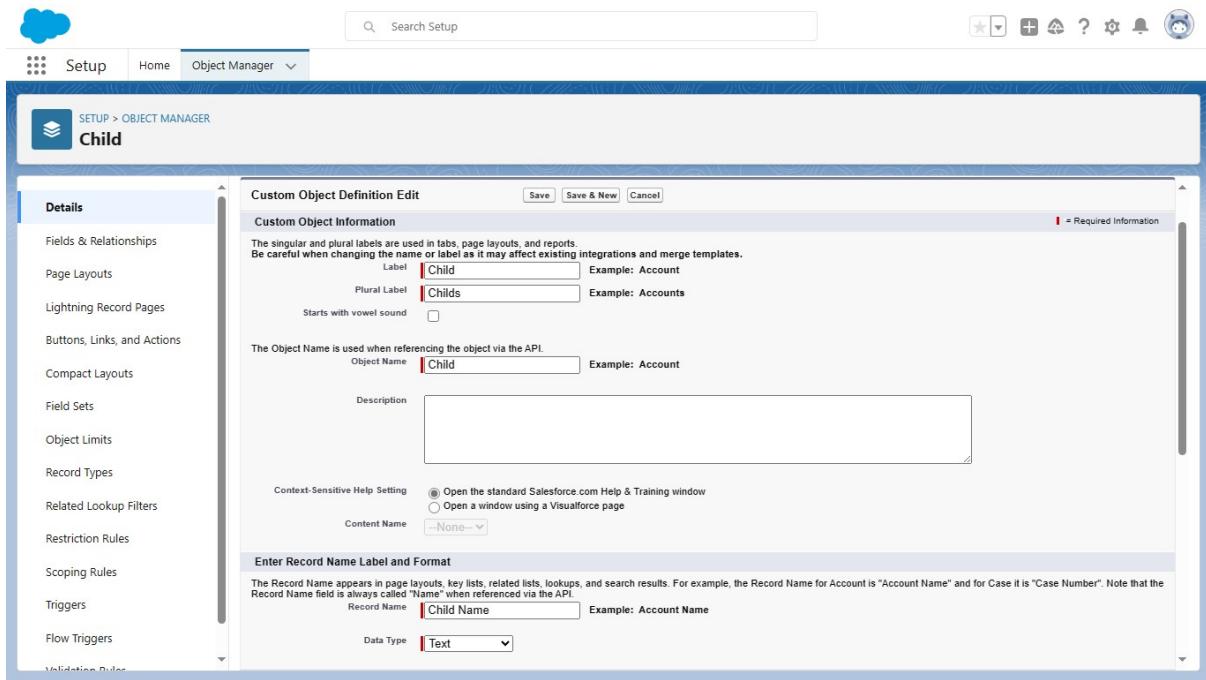
Zone no : Zone 8

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.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A new custom object is being created, named 'Parent'. The 'Custom Object Definition Edit' screen displays the following details:

- Custom Object Information:**
 - Label: Parent (Example: Account)
 - Plural Label: Parents (Example: Accounts)
 - Starts with vowel sound:
- Object Name:** Object Name: Parent (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name:** Content Name: None
- Enter Record Name Label and Format:**
 - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
 - Record Name: Parent Name (Example: Account Name)
 - Data Type: Text



Step 2: Create a Master-Detail Relationship

1. Go to "Setup" in Salesforce.
2. In the Quick Find box, type "Objects" and select "Objects and Fields" > "Objects".
3. Click on "Parent" to edit it.
4. In the "Custom Fields & Relationships" section, click "New" under "Related To".
5. Choose "Master-Detail Relationship" as the data type.
6. In the "Related To" field, select "Child".
7. Configure other options as needed (e.g., setting the relationship name and whether it's required).
8. Save the changes.

Fields & Relationships
4 Items, Sorted by Field Label

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)		✓

New Custom Field

Step 1. Choose the field type

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

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Setup Home Object Manager

SETUP > OBJECT MANAGER Parent

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

Details

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To Child

Help for this Page

Step 2 of 6

Previous Next Cancel

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER Child

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)		

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

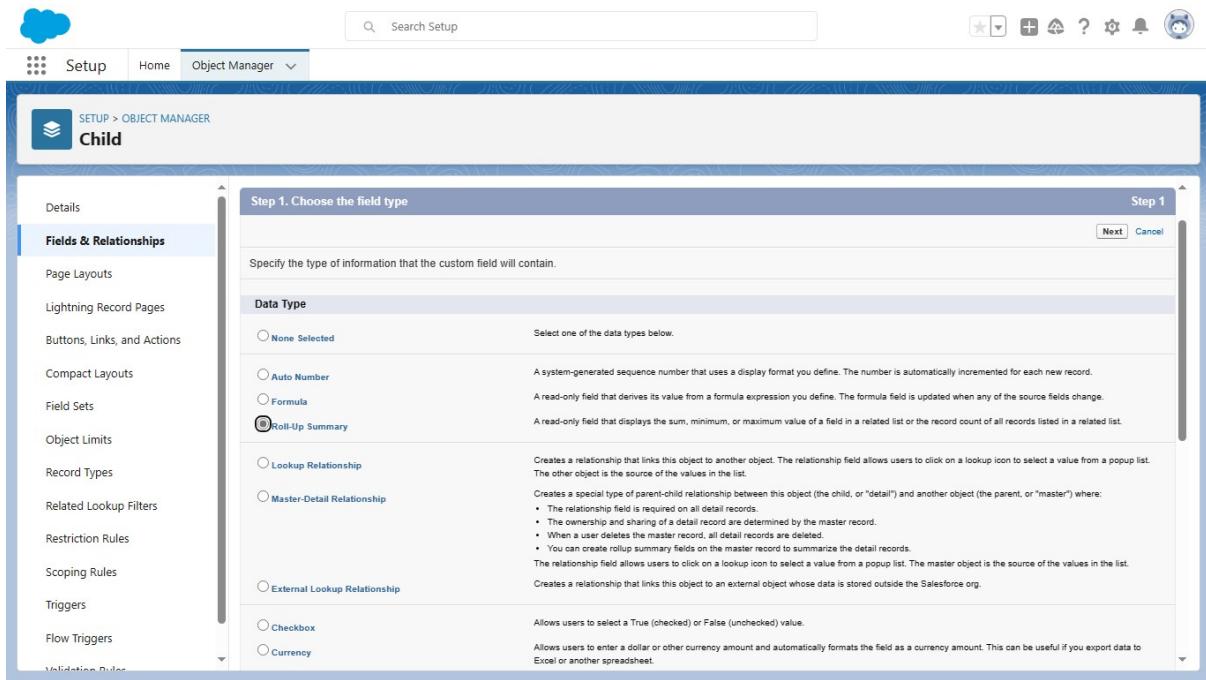
Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules



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 'User Interface' expanded, with 'Tabs' selected. A message at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section has a 'New' and 'What Is This?' link. The 'Custom Object Tabs' section shows a table with four rows:

Action	Label	Tab Style	Description
Edit Del	Brokers	People	
Edit Del	Childs	Lightning	
Edit Del	Parents	Lightning	

The 'Web Tabs' section says 'No Web Tabs have been defined'. The other sections say 'No Visualforce Tabs have been defined', 'No Lightning component tabs have been defined', and 'No Lightning Page tabs 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
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, opportuni...	22/08/2023, 11:15 am	Lightning

New Lightning App

App Details & Branding

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

App Details

*App Name: Parent Details

*Developer Name: Dharmaraj R

Description: Enter a description...

App Branding

Image: Upload

Primary Color Hex: Value: #0070D2

Org Theme Options: Use the app's image and color instead of the org's custom theme

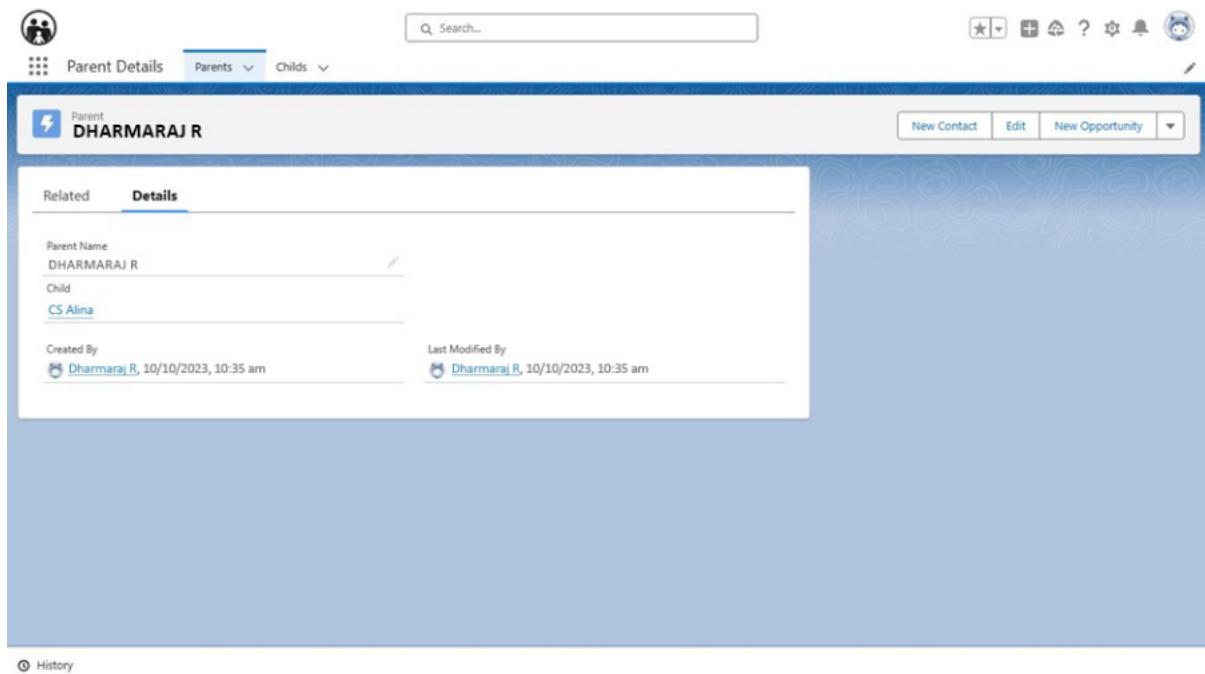
App Launcher Preview

Next

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.

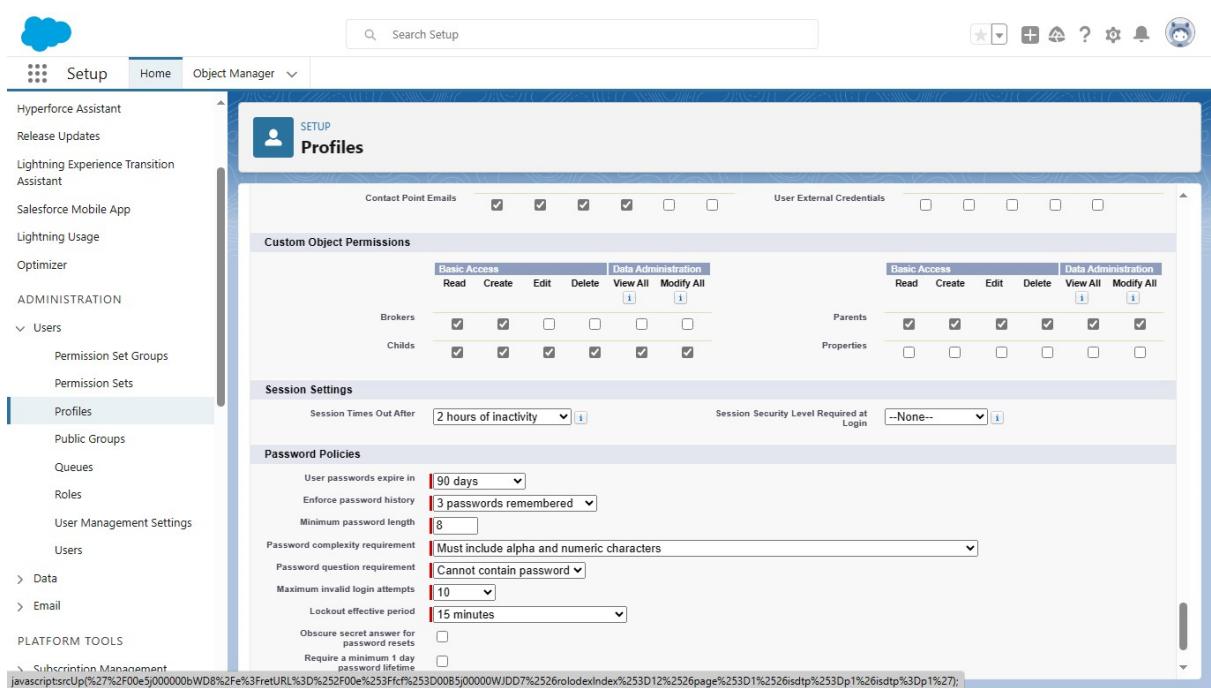
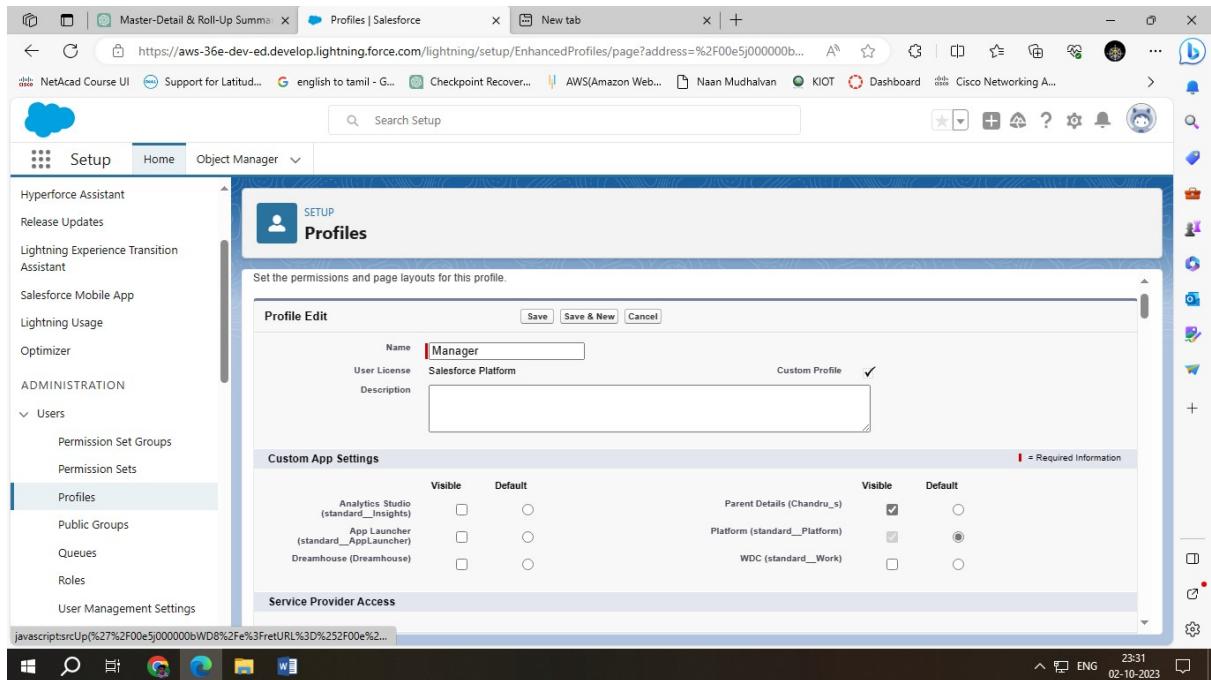
That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



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

Step 1: Create a Public Group

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

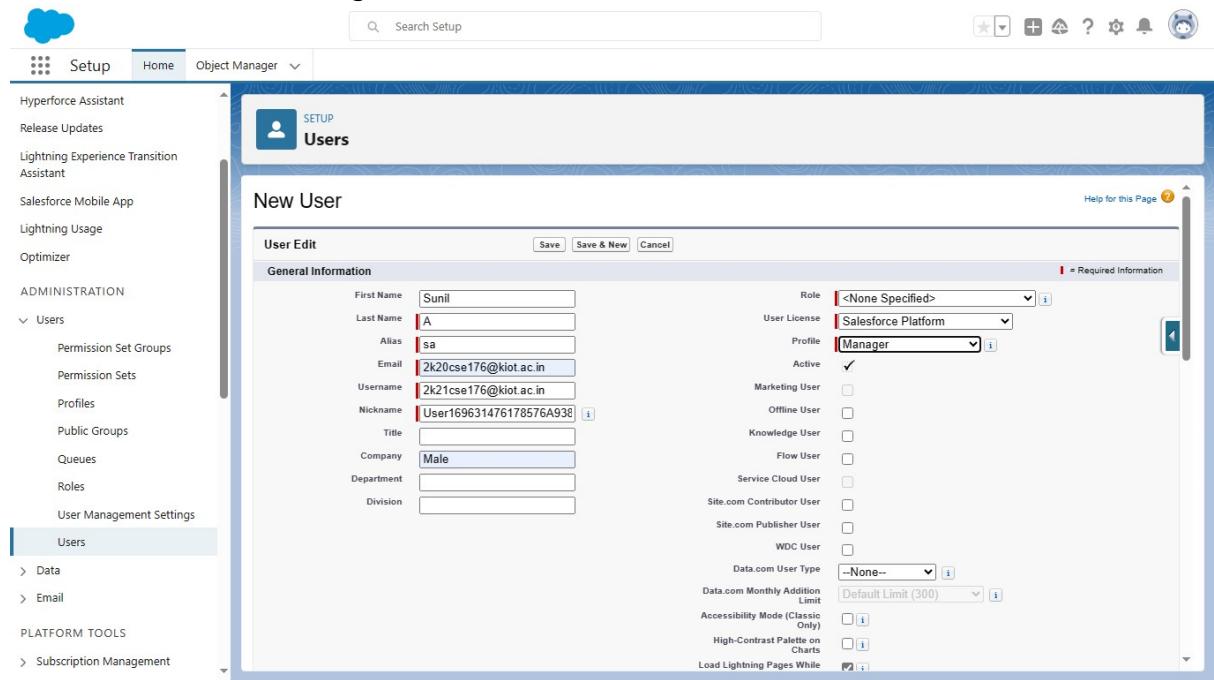


Step 2: Create Criteria-Based Sharing Rules

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

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

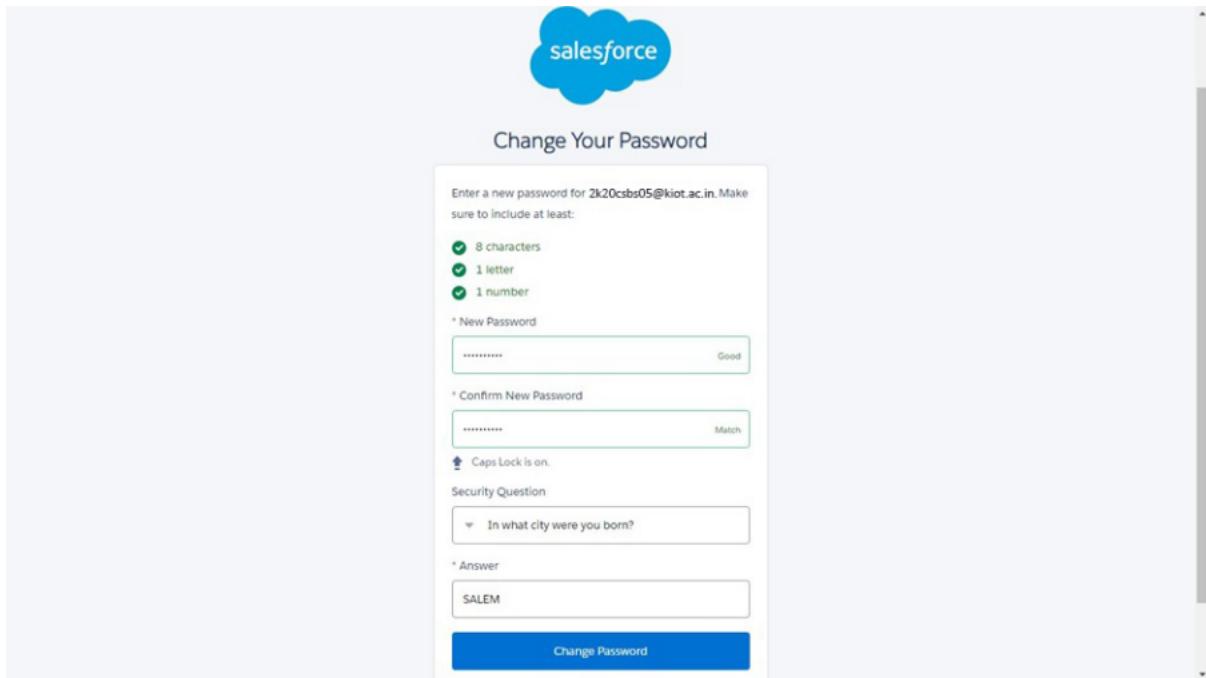
- 3. Under "Account Sharing Rules," click on "New Sharing Rule."**
- 4. Create a rule that shares records owned by members of "UserB_Group" with the "UserA_Group."**
- 5. Define the criteria based on which records should be shared (e.g., ownership).**
- 6. Save the sharing rule.**



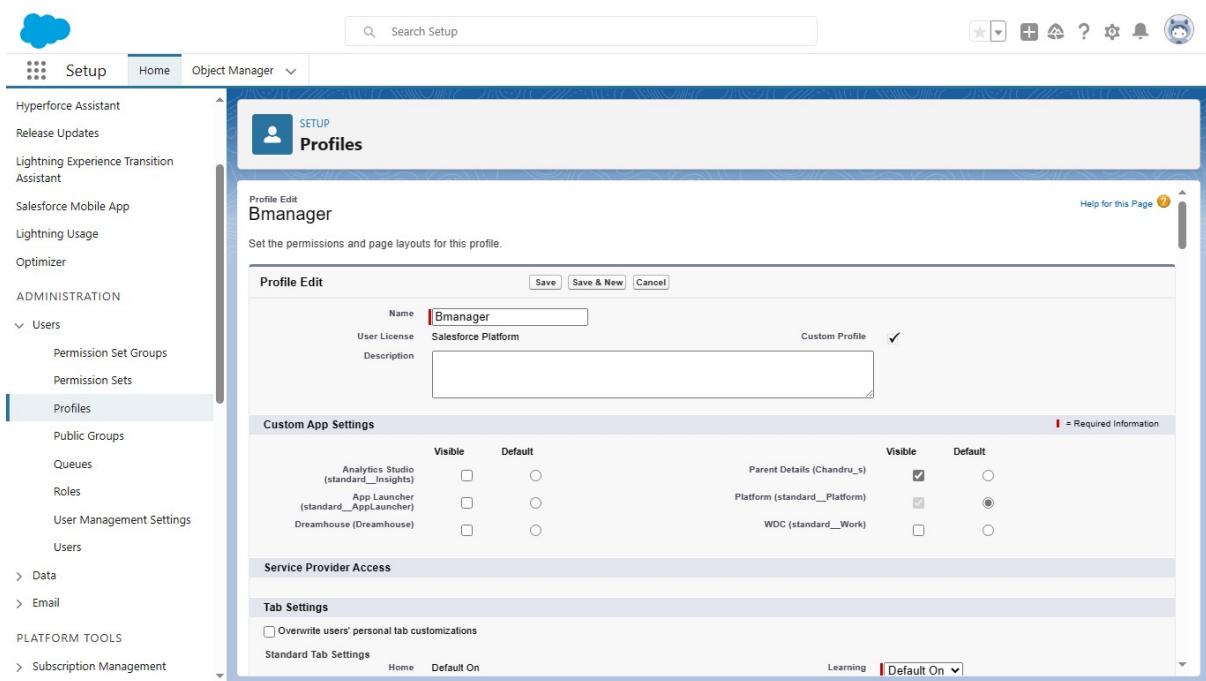
The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, a sidebar lists various setup categories like Hyperforce Assistant, Release Updates, and Administration. The main content area displays the 'User Detail' page for a user named 'Sunil A'. The user's details include:

Name	Sunil A	Role	Salesforce Platform Manager
Alias	sa	User License	
Email	2k20cse176@kiot.ac.in (Verify) [i]	Profile	Manager
Username	2k21cse176@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User169631476178576A93816 [i]	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	Male	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	275 Kolankondai(p.o) Mallasamudram 637503 Tamil Nadu India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	[i]
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> [i]
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> [i]
Federation ID		Hatched Contrast Palette on Charts	<input type="checkbox"/> [i]

The screenshot shows an open Gmail inbox. A new message from 'developer@salesforce.com' is visible, with the subject 'Welcome to Salesforce: Verify your account'. The message body contains a welcome message from Salesforce and a blue button labeled 'Verify Account'. Below the button, it says 'To easily log in later, save this URL:' followed by a link: <https://knowledgeinstituteoftech-4d-dev-ed-develop.my.salesforce.com>. The message also includes a placeholder for a username: 'Username: 2k20csb05@kiot.ac.in'.



The screenshot shows the "Change Your Password" page in the Salesforce interface. At the top, there's a blue cloud icon with the word "salesforce". Below it, the title "Change Your Password" is centered. A message box contains instructions: "Enter a new password for 2k20csbs05@kiot.ac.in. Make sure to include at least:" followed by three requirements with green checkmarks: "8 characters", "1 letter", and "1 number". Below these requirements are two input fields: "New Password" and "Confirm New Password". The "New Password" field has a green "Good" status indicator. The "Confirm New Password" field has a green "Match" status indicator. There's also a note "Caps Lock is on." with a small warning icon. Below these fields are "Security Question" and "Answer" sections. The security question is "In what city were you born?" and the answer is "SALEM". At the bottom right is a large blue "Change Password" button.



The screenshot shows the "Profiles" page in 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 Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), Data, Email, Platform Tools, and Subscription Management. The main content area is titled "Profiles" and shows a "Profile Edit" for the profile "Bmanager". The profile details are: Name (Bmanager), User License (Salesforce Platform), and Description (Custom Profile). The "Custom App Settings" section lists several app settings with checkboxes for "Visible" and "Default". The "Service Provider Access" section is collapsed. The "Tab Settings" section includes a checkbox for "Overwrite users' personal tab customizations" and a "Standard Tab Settings" section with a "Default On" dropdown. A "Help for this Page" link is located in the top right corner of the main content area.

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

- Left Sidebar:**
 - Hyperforce Assistant
 - Release Updates
 - Lightning Experience Transition Assistant
 - Salesforce Mobile App
 - Lightning Usage
 - Optimizer
 - ADMINISTRATION**
 - Users** (selected)
 - Permission Set Groups
 - Permission Sets
 - Profiles** (selected)
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
 - Users - Data
 - Email
 - PLATFORM TOOLS
 - Subscription Management
- Top Bar:** Search Setup, Home, Object Manager, Setup icon, Help icon, Notifications, User icon.
- Main Content Area - Profiles Page:**

SETUP Profiles

	Contacts	Push Topics
Contact Point Addresses	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" 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"/>	<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"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Sellers	Streaming Channels
	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	User External Credentials	
	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <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.

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	Sanjay
Last Name	P
Alias	sp
Email	2k20cse171@kiot.ac.in
Username	2k22cse171@kiot.ac.in
Nickname	User1696315620912300622
Title	
Company	
Department	
Division	
Role	<None Specified>
User License	Salesforce Platform
Profile	Bmanager
Active	✓
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 checked="" 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"/>
Who will use this permission set?	<p>-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.</p>
Not sure what a permission set license is? Learn more here.	
License	-None--

Permission Set
permission

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 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

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

Full Name	Role	Username	Profile
Dharmaraj R	CS	au611220244005@naanmudhalvan.com	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzkibsrf@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	insightsecurity@00d5j00000cismqean.com	Analytics Cloud Security User
Sunil A	sa	2k21cse176@kiot.ac.in	Manager

Cancel Next

Subscription Management

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

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	Manager	Salesforce Platform	✓	Never Expires	

Cancel Back Assign

Subscription Management

Setup Home Object Manager

Hyperfector 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

... > PERMISSIONS permission

1 assignments were successful.

Assignment Summary

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

Done

Setup Home Object Manager

Hyperfector 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

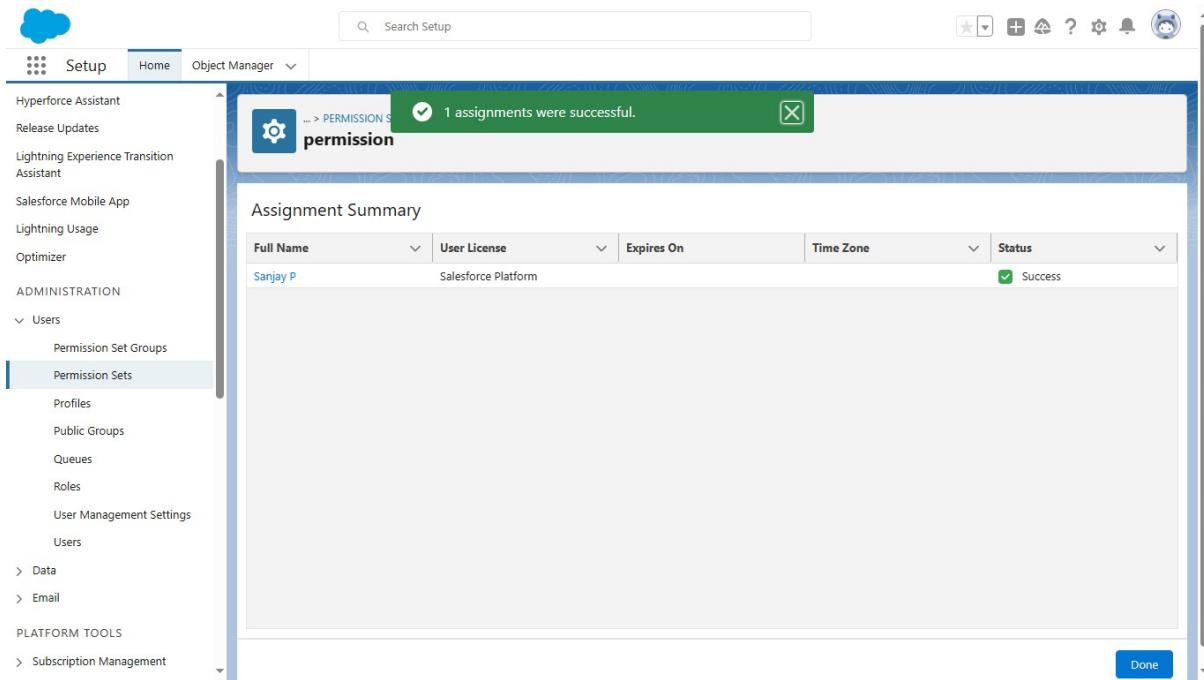
Operating Hours Holidays
Opportunities
Opportunity_Contact Role
Opportunity_Product
Order Products
Orders
Parents
Party Consents
Payment Authorization Adjustments
Payment Authorizations
Payment Gateway Logs
Payment Gateways
Payment Groups
Payment Line Invoices
Payments
Pending Order Summaries
Pending Order Summary Processed Events
Price Book Entries
Price Books
Privacy Consents
Problem Related Items
Problems
Process Cart Pricing Events
Process Cart Pricing Response Events
Process Exceptions
Product Attributes
Product Attribute Set Products

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

- Left Sidebar:** Includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, Permission Set Groups, and Permission Sets.
- Page Header:** Shows "Search Setup" and various navigation icons.
- Page Title:** "Permission Sets" under "SETUP".
- Section:** "Permission Set permission".
- Buttons:** "Find Settings...", "Clone", "Edit Properties", "Manage Assignments".
- Breadcrumbs:** "Permission Set Overview > Object Settings > Parents".
- Form Fields:** "Parents" section with "Available" and "Visible" columns, and a "Save" button.
- Table:** "Object Permissions" table with columns "Permission Name" and "Enabled".
- Table:** "Field Permissions" table with columns "Field Name", "Read Access", and "Edit Access".
- Page URL:** <https://aws-36e-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/0P5j000007Uxoi/e?s=EntityPermissions&o=01I5j000002r15H&isotp=p1>

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

- Left Sidebar:** Includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, Permission Set Groups, and Permission Sets.
- Page Header:** Shows "Search Setup" and various navigation icons.
- Page Title:** "permission" under "PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION".
- Section:** "Select Users to Assign".
- Section:** "All Users".
- Table:** A list of users with columns: Full Name, Username, Role, Ac..., and Profile. One user, "Sanjay P", has a checked checkbox in the "Role" column.
- 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.

Screenshot of the Salesforce Lightning Experience showing the "All Users" page under the "Users" section of the Setup menu.

Page Headers: Master-Detail & Roll-Up Summary, Users | Salesforce, New tab, https://aws-36e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Page Content:

- Left Sidebar:** 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).
- Section Header:** All Users
- Text:** On this page you can create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android.
- View Options:** View: All Users, Edit | Create New View
- Table:** A list of users with columns: Action, Full Name, Alias, Username, Role, Active, Profile. The table includes links for Edit, Delete, and Clone. A checkbox header is present.
- Buttons:** New User, Reset Password(s), Add Multiple Users.
- Page Footer:** Help for this Page, A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Screenshot of the Salesforce Lightning Experience showing the "Profiles" page under the "Profiles" section of the Setup menu.

Page Headers: Home, Object Manager, Search Setup, https://aws-36e-dev-ed.develop.lightning.force.com/one/one.app#/setup/EnhancedProfiles/home

Page Content:

- Left Sidebar:** 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).
- Section Header:** Profiles
- Text:** All Profiles, Edit | Delete | Create New View
- Table:** A list of profiles with columns: Action, Profile Name, User License, Custom. The table includes links for Edit, Clone, Delete, and Details. A checkbox header is present.
- Buttons:** New Profile, Edit | Delete | Create New View.
- Page Footer:** Help for this Page, A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All, Page 1 of 2

The screenshot shows the Salesforce Setup interface for cloning a profile. The left sidebar includes sections like Lightning Usage, Administration, Data, Email, Platform Tools, and Einstein. The main content area is titled "Clone Profile" and displays a form to clone the "Standard Platform User" profile into a new one named "Manager". A note at the top says "You must select an existing profile to clone from." The form fields are: Existing Profile (dropdown set to "Standard Platform User"), User License (dropdown set to "Salesforce Platform"), and Profile Name (text input set to "Manager"). Buttons for "Save" and "Cancel" are at the bottom.

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, and Administration. The main content area is titled "Profile Detail" for the "chan" profile. It shows the profile's name ("chan"), user license ("Salesforce Platform"), and creation details ("Created By: Chandru S. 03/10/2023, 1:50 pm"). Below this, the "Page Layouts" section lists various standard object layouts assigned to the profile, such as Global Layout for Email Application and Home Page Default for Home Page Layout. Buttons for "Edit", "Clone", "Delete", and "View Users" are available at the top of the profile detail section.

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

SETUP Profiles

Basic Access						Data Administration					
Read	Create	Edit	Delete	View All	Modify All	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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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"/>	<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"/>	<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"/>	<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 minimum 1 day password expiration

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

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

Description:

Custom Profile:

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"/>

I = Required Information

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 "Users". The "Users" section is currently selected. The main content area is titled "All Users" and displays a table of users. The table columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	A_Sunil	sa	2k2cse176@kiot.ac.in	Manager	<input checked="" type="checkbox"/>	Manager
Edit	Chatter_Expert	Chatter	chatty.00d5000000cismoean.eodfzibtsrf@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	Chatter Free User
Edit	P_Sanjay	SR	2k2cse171@kiot.ac.in	Manager	<input checked="" type="checkbox"/>	Manager
Edit	S_Chandru	CS	au811220104303@naanmudhalvan.com	System Administrator	<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@00d5000000cismoean.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d5000000cismoean.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	Analytics Cloud Security User

The screenshot shows the Salesforce Classic Experience. The left sidebar is identical to the one in the top screenshot. The main content area is titled "New User" and shows the "User Edit" form. The "General Information" section contains fields for First Name (Sunil), Last Name (A), Alias (sa), Email (2k2cse176@kiot.ac.in), Username (2k2cse176@kiot.ac.in), Nickname (User1696321490080232961), Title, Company (Male), Department, and Division. To the right of these fields are dropdown menus for Role (selected: <None Specified>), User License (Salesforce Platform), Profile (chan), and Active (checked). Below these are checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (selected: --None--). At the bottom are checkboxes for 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. The left sidebar is titled "Setup" and includes sections for Lightning Usage, Optimizer, Administration, and various tools like Data, Email, and Platform Tools. Under Administration, the "Users" section is expanded, showing sub-options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The "Users" option is selected. 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. The email address is 2k20cse176@kiot.ac.in, which is verified. The username is 2k23cse176@kiot.ac.in. The nickname is User16963214900802329619. The user is active and assigned to the Marketing User role. The profile is chan. The company is Male. The department is 2/75 Kolankondai(p.o) Mallasamudram 637503 Tamil Nadu India. The time zone is (GMT+05:30) India Standard Time (Asia/Kolkata). The locale is English (India). The language is English. The user has Site.com Contributor User license. The mobile push registrations are View. The data.com user type is WDC User. The accessibility mode is Classic Only. The debug mode is off. The federation ID is Only if I am an approver. The high-contrast palette on charts is off.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous one, with sections 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 "Users" section is expanded, showing sub-options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The "Users" option is selected. 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, username is 2k21cse176@kiot.ac.in, nickname is User169631476178576A938, title is blank, company is Male, department is blank, and division is blank. The role is <None Specified>, user license is Salesforce Platform, profile is chan, and active is checked. The marketing user, offline user, knowledge user, flow user, service cloud user, site.com publisher user, site.com contributor user, site.com publisher user, wdc user, data.com user type (set to --None--), data.com monthly addition limit (set to 300), accessibility mode (classic only), and high-contrast palette on charts are all off. The help for this page is available.

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. Under Users, there are links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled "SETUP Users All Users". It displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Two users are listed: "A_Sunil" (alias SA, username 2k21cse176@kiot.ac.in, role chan, active) and "A_Sunil" (alias SA, username 2k23cse176@kiot.ac.in, role chan, active). Navigation links at the bottom include New User, Reset Password(s), Add Multiple Users, and letter-based navigation (A-Z).

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 following details:

- Header:** Search Setup, Home, Object Manager.
- 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 (selected)
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
- Content Area:**

Permission Sets

On this page you can create, view, and manage permission sets. In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | [Edit](#) | [Delete](#) | [Create New View](#)

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, subloc...	Facility Manager
<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		

Page 1 of 2

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

- Header:** Search Setup, Home, Object Manager.
- 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 (selected)
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
- Content Area:**

Permission Set

permission01

Find Settings... | [Clone](#) | [Delete](#) | [Edit Properties](#) | [Manage Assignments](#)

Permission Set Overview

Description	API Name	permission01
License	Namespace Prefix	
Session Activation Required	Created By	Chandru S. 03/10/2023, 1:59 pm
Last Modified By		

Edit Properties

Label: API Name: Description:
 Session Activation Required

App Permissions
Apex Class Access
Visualforce Page Access
External Data Source Access

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes links for Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. Under "Users", there are sections for Permission Set Groups and Permission Sets, with "Permission Sets" currently selected. The main content area is titled "Permission Sets" and shows "permission01". The navigation bar at the top of the content area includes "Find Settings...", "Clone", "Delete", "Edit Properties", and "Manage Assignments". Below this, the breadcrumb trail shows "Permission Set Overview > Object Settings > Accounts". The "Accounts" tab is selected. The "Object Permissions" section lists permissions for "Account": Read, Create, Edit, Delete, View All, and Modify All, all of which are checked. The "Field Permissions" section lists permissions for fields: Account Name, Account Number, Account Owner, Account Site, Account Source, Active, and Annual Revenue. For most fields, "Read Access" is checked and "Edit Access" is unchecked, except for Account Owner where both are checked.

This screenshot is identical to the one above, showing the "Permission Sets" page for "permission01". The left sidebar and main content area are exactly the same, displaying the object settings for the "Accounts" object. The "Object Permissions" and "Field Permissions" tables show the same access levels as the first screenshot.

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

All Users

2 items selected

Full Name	Role	Username	Profile
Dhammara R	CS	au611220244005@naanmudhalvan.com	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzibsr@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

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

No expiration date

Specify the expiration date

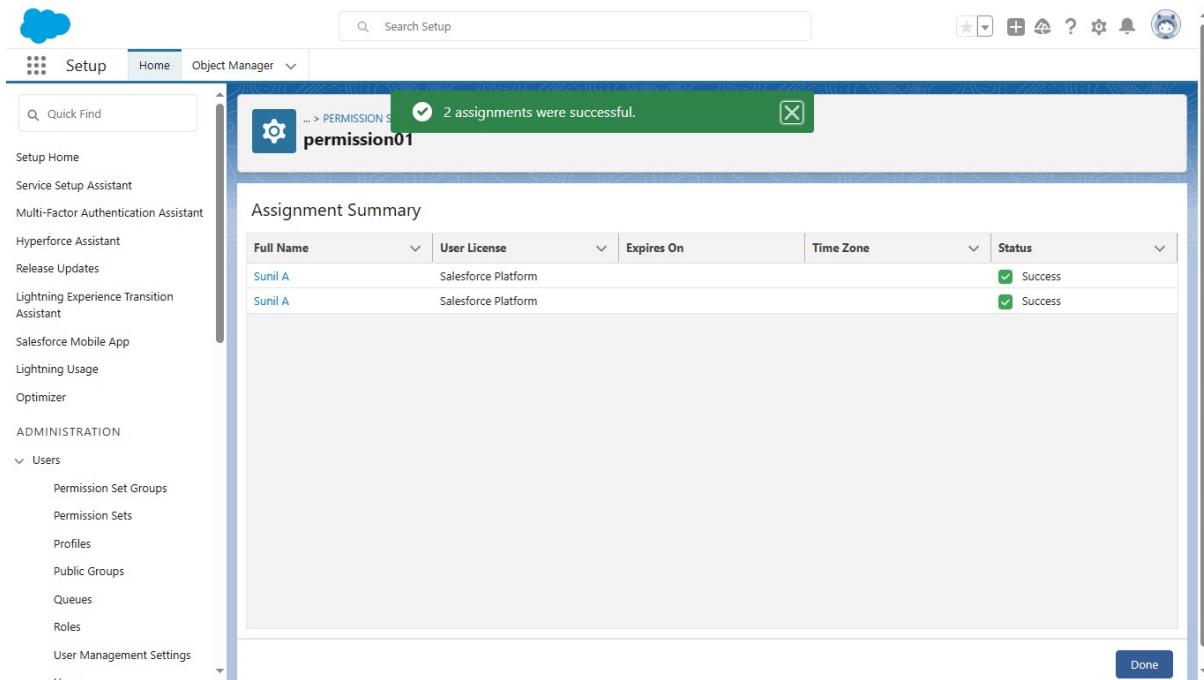
1 Day 1 Week 30 Days 60 Days Custom Date

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	

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

Step 3: Create an Email Alert

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

Edit Email Alert Help for this Page 
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		<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>																													
<p>Edit Email Alert = Required Information</p> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Description</td> <td style="width: 85%;"><input type="text" value="Survey - Thank You Email"/></td> </tr> <tr> <td>Unique Name</td> <td><input type="text" value="Survey_Thank_You_Email"/> </td> </tr> <tr> <td>Object</td> <td>Survey Result</td> </tr> <tr> <td>Email Template</td> <td><input type="text" value="Thank You Email - Survey"/> </td> </tr> <tr> <td>Protected Component</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Recipient Type</td> <td> Search: <input type="text" value="User"/>  for: <input type="text"/> <input type="button" value="Find"/> </td> </tr> <tr> <td>Recipients</td> <td> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 50%;">Available Recipients</th> <th style="width: 50%;">Selected Recipients</th> </tr> <tr> <td style="vertical-align: top;"> User: Integration User User: Rakesh Gupta User: Security User </td> <td style="vertical-align: top;"> Email Field: Email </td> </tr> <tr> <td style="text-align: center;"> <input type="button" value="Add"/>  <input type="button" value="Remove"/>  </td> <td></td> </tr> </table> </td> </tr> <tr> <td colspan="3" style="padding-top: 10px;"> You can enter up to five (5) email addresses to be notified. Additional Emails <input type="text"/> </td> </tr> <tr> <td>From Email Address</td> <td colspan="2"> <input type="text" value="Current User's email address"/>  </td> </tr> <tr> <td colspan="3"> <input type="checkbox"/> Make this address the default From email address for this object's email alerts.  </td> </tr> </table>			Description	<input type="text" value="Survey - Thank You Email"/>	Unique Name	<input type="text" value="Survey_Thank_You_Email"/> 	Object	Survey Result	Email Template	<input type="text" value="Thank You Email - Survey"/> 	Protected Component	<input type="checkbox"/>	Recipient Type	Search: <input type="text" value="User"/>  for: <input type="text"/> <input type="button" value="Find"/>	Recipients	<table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 50%;">Available Recipients</th> <th style="width: 50%;">Selected Recipients</th> </tr> <tr> <td style="vertical-align: top;"> User: Integration User User: Rakesh Gupta User: Security User </td> <td style="vertical-align: top;"> Email Field: Email </td> </tr> <tr> <td style="text-align: center;"> <input type="button" value="Add"/>  <input type="button" value="Remove"/>  </td> <td></td> </tr> </table>	Available Recipients	Selected Recipients	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email	<input type="button" value="Add"/>  <input type="button" value="Remove"/> 		You can enter up to five (5) email addresses to be notified. Additional Emails <input type="text"/>			From Email Address	<input type="text" value="Current User's email address"/> 		<input type="checkbox"/> Make this address the default From email address for this object's email alerts. 		
Description	<input type="text" value="Survey - Thank You Email"/>																														
Unique Name	<input type="text" value="Survey_Thank_You_Email"/> 																														
Object	Survey Result																														
Email Template	<input type="text" value="Thank You Email - Survey"/> 																														
Protected Component	<input type="checkbox"/>																														
Recipient Type	Search: <input type="text" value="User"/>  for: <input type="text"/> <input type="button" value="Find"/>																														
Recipients	<table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 50%;">Available Recipients</th> <th style="width: 50%;">Selected Recipients</th> </tr> <tr> <td style="vertical-align: top;"> User: Integration User User: Rakesh Gupta User: Security User </td> <td style="vertical-align: top;"> Email Field: Email </td> </tr> <tr> <td style="text-align: center;"> <input type="button" value="Add"/>  <input type="button" value="Remove"/>  </td> <td></td> </tr> </table>	Available Recipients	Selected Recipients	User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email	<input type="button" value="Add"/>  <input type="button" value="Remove"/> 																									
Available Recipients	Selected Recipients																														
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email																														
<input type="button" value="Add"/>  <input type="button" value="Remove"/> 																															
You can enter up to five (5) email addresses to be notified. Additional Emails <input type="text"/>																															
From Email Address	<input type="text" value="Current User's email address"/> 																														
<input type="checkbox"/> Make this address the default From email address for this object's email alerts. 																															

| | | |

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

- 1.Click Setup.
- 2.In the Quick Find box, type Flows.
- 3.Select Flows then click on the New Flow.
- 4.Select the Screen Flow option and click on Next and configure the flow as follows:
- 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
<input type="text" value="Save Response"/>	<input type="text" value="Save_Response"/>

Description

How Many Records to Create

- One
- Multiple

How to Set the Record Fields

- Use all values from a record
- Use separate resources, and literal values

Create a Record of This Object

***Object**

Set Field Values for the Survey Result

Field	Value
<input type="text" value="Comment__c"/>	<input type="text" value="A_a Comment X"/> ←
<input type="text" value="Email__c"/>	<input type="text" value="A_a Email > Value X"/> ←
<input type="text" value="Name__c"/>	<input type="text" value="(!Name.firstName) (!Name.lastName)"/> ←
<input type="text" value="Rating__c"/>	<input type="text" value="A_a Rating X"/> ←

+ Add Field

Manually assign variables

Cancel **Done**

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

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

5.Click Done.

Edit "Survey - Thank You Email" email alert

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

* Label	* API Name
Send Thank You Email	Send_Thank_You_Email
Description	
<input type="text"/>	
Set Input Values	
A3 * Record ID	<input type="text"/> {!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: Active Type: Screen Flow Version Number: 2

Cancel Save

The screenshot shows the 'Save as' dialog for a new flow. The 'A New Version' button is selected. The 'Flow Label' is 'Survey' and the 'Flow API Name' is also 'Survey'. There is a 'Description' field which is empty. Under 'How to Run the Flow', it says 'User or System Context—Depends on How Flow is Launched'. The 'Type' is set to 'Screen Flow'. The 'API Version for Running the Flow' is '51'. In the 'Interview Label' section, there is a search bar with 'Survey {!\$Flow.CurrentDateTime}' entered. At the bottom, the status is 'Active', the type is 'Screen Flow', and the version number is '2'. There are 'Cancel' and 'Save' buttons.

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 also present.

The main area is titled "Page Information" with a note "1 = Required Information". 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" (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	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   [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

G

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.