

NAAN MUDHALVAN

Salesforce Developer (Course)

Assignment

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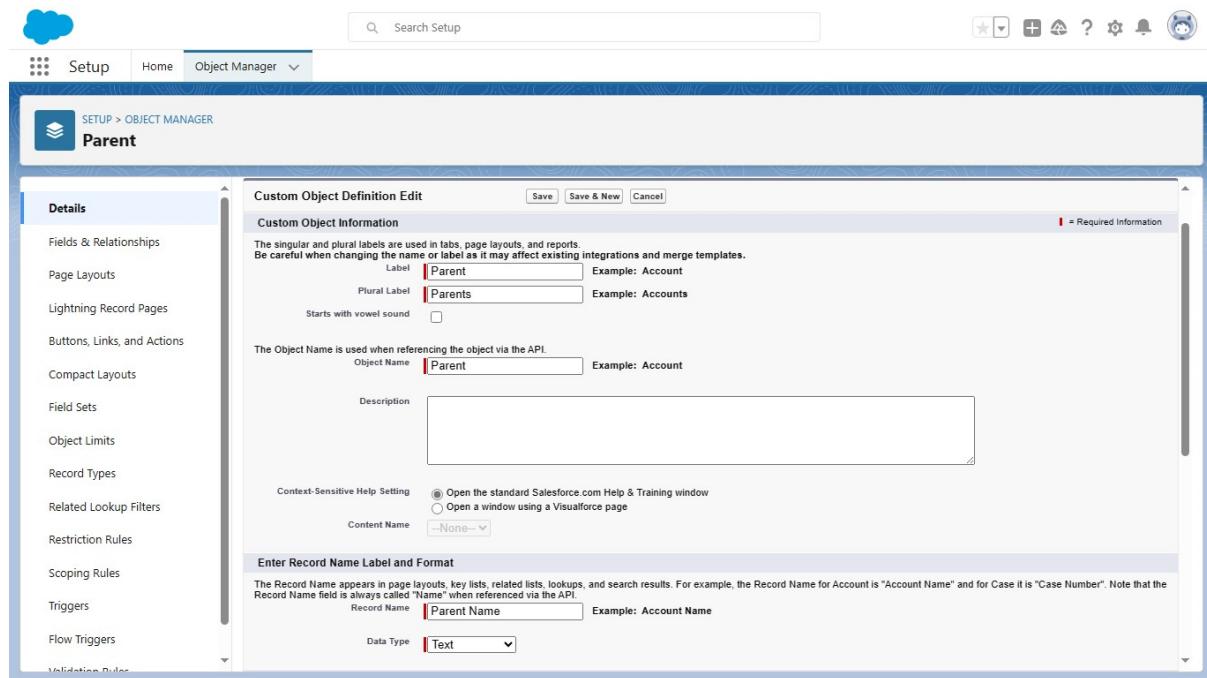
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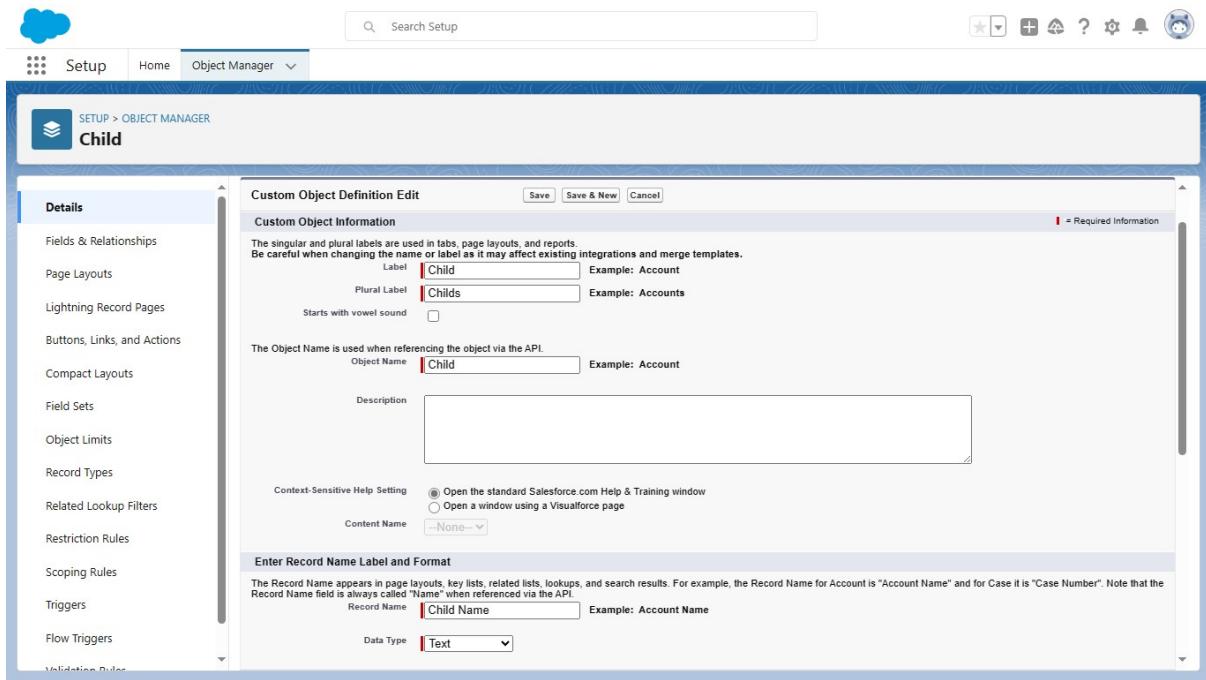
Batch : 2024

Zone no : Zone 8

1. Creating a Master-Detail Relationship between two custom objects and setting up a Roll-Up Summary Field to calculate the total number of records in the child object is a common task in Salesforce. Below are the steps to achieve this:

Step 1: Create Custom Objects.





Step 2: Create a Master-Detail Relationship

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

SETUP > OBJECT MANAGER

Parent

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)		✓

SETUP > OBJECT MANAGER

Parent

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.

Step 1

Help for this Page

Next Cancel

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

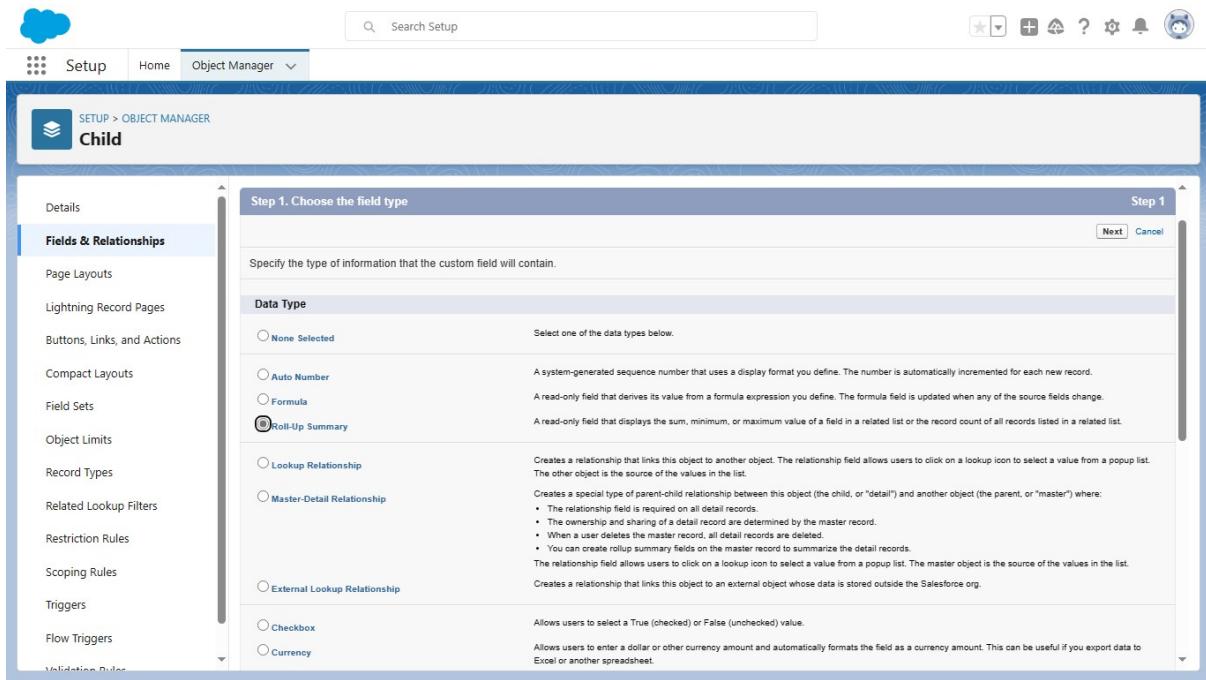
Restriction Rules

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 top says 'Didn't find what you're looking for? Try using Global Search.' The main content area displays four sections: 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs'. Each section has a 'New' and 'What Is This?' link. The 'Custom Object Tabs' section contains the following data:

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

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

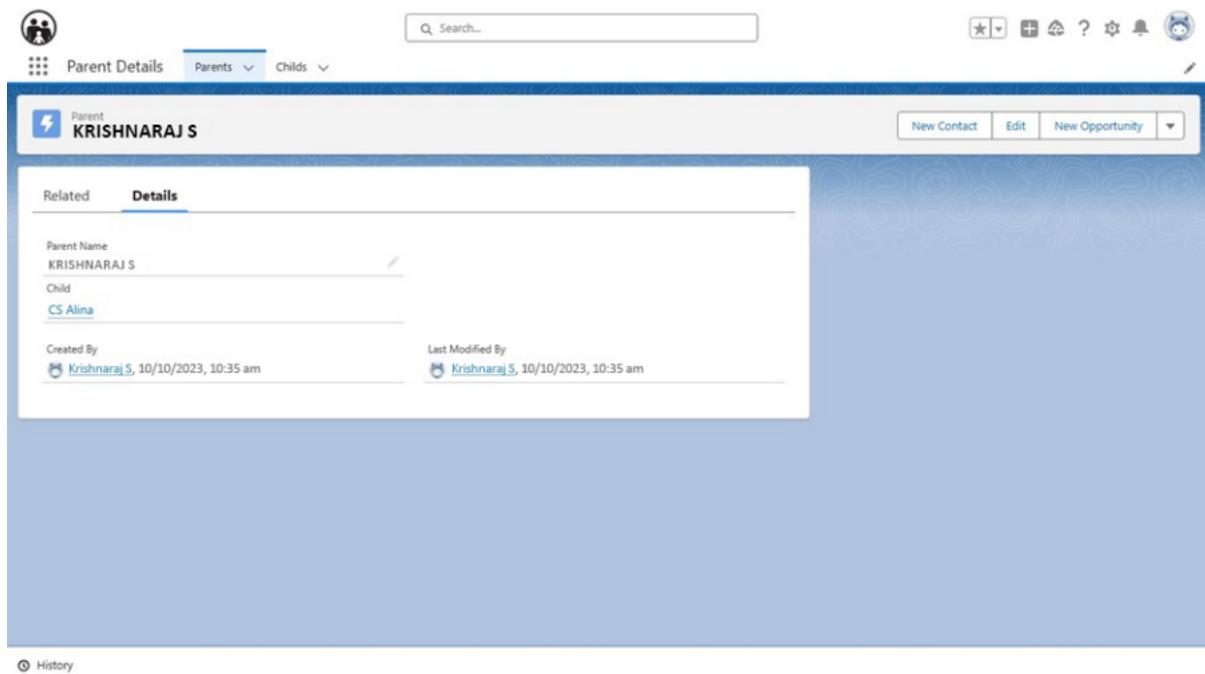
Depending on your use case, you may want to update page layouts and record types to make sure the new relationship and fields are displayed correctly to your users.

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

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.

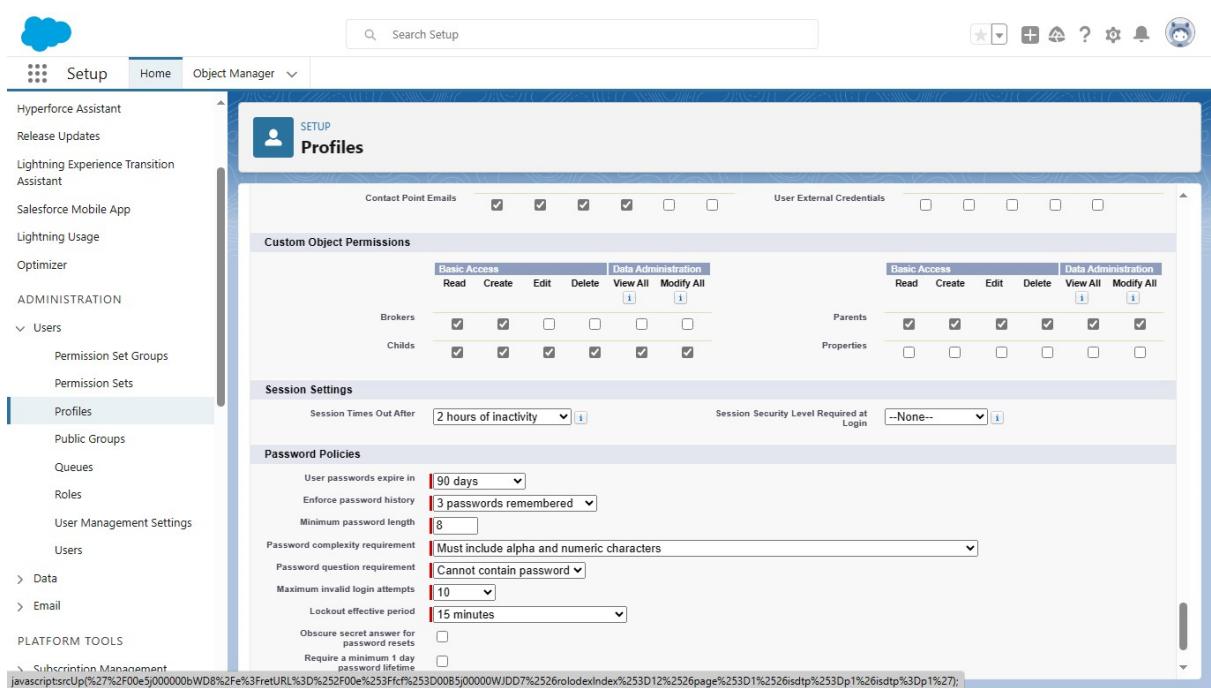
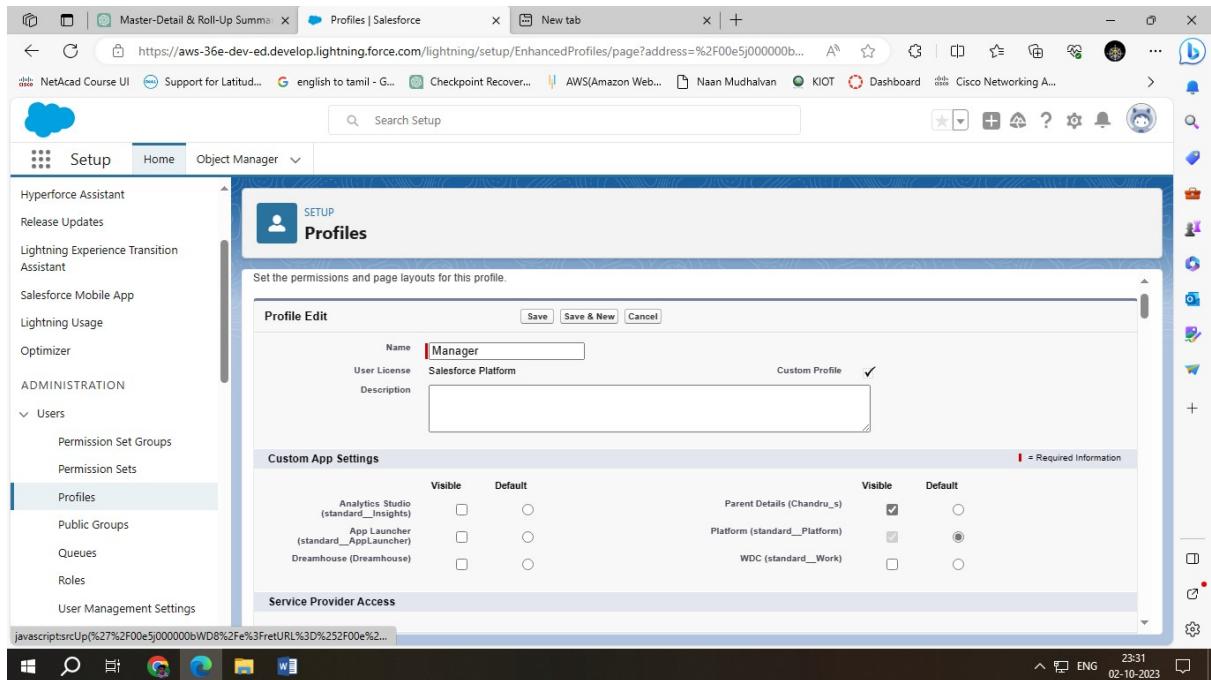
That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



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.**

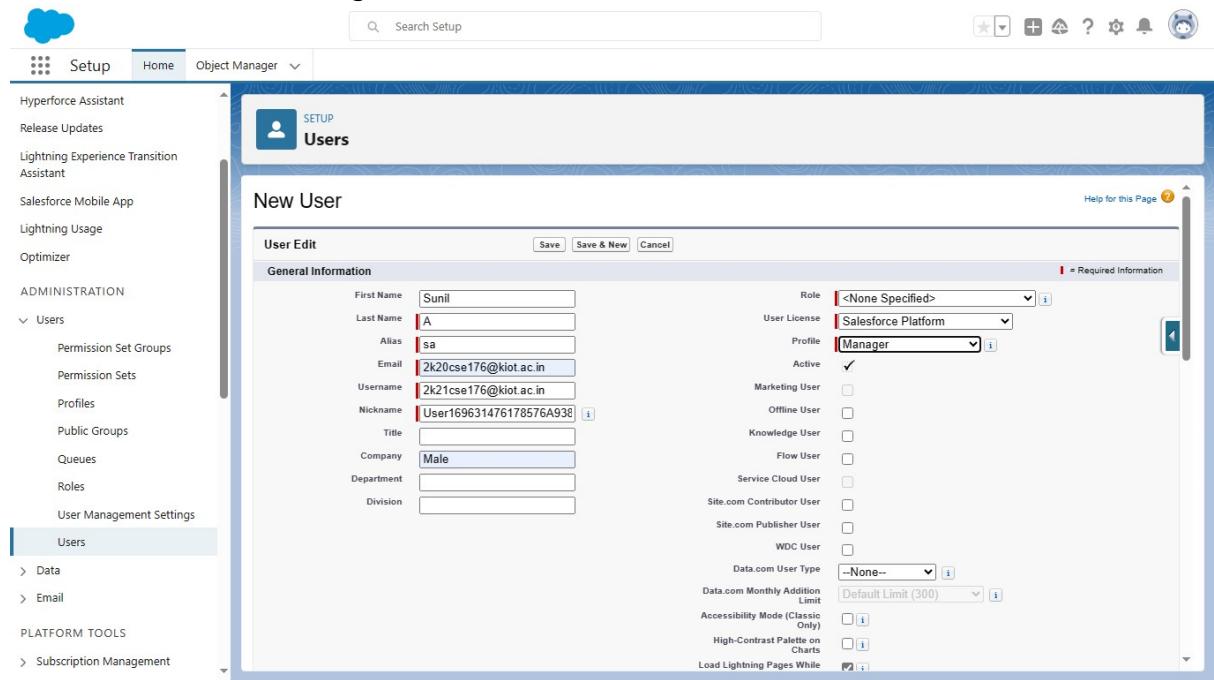


Step 2: Create Criteria-Based Sharing Rules

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

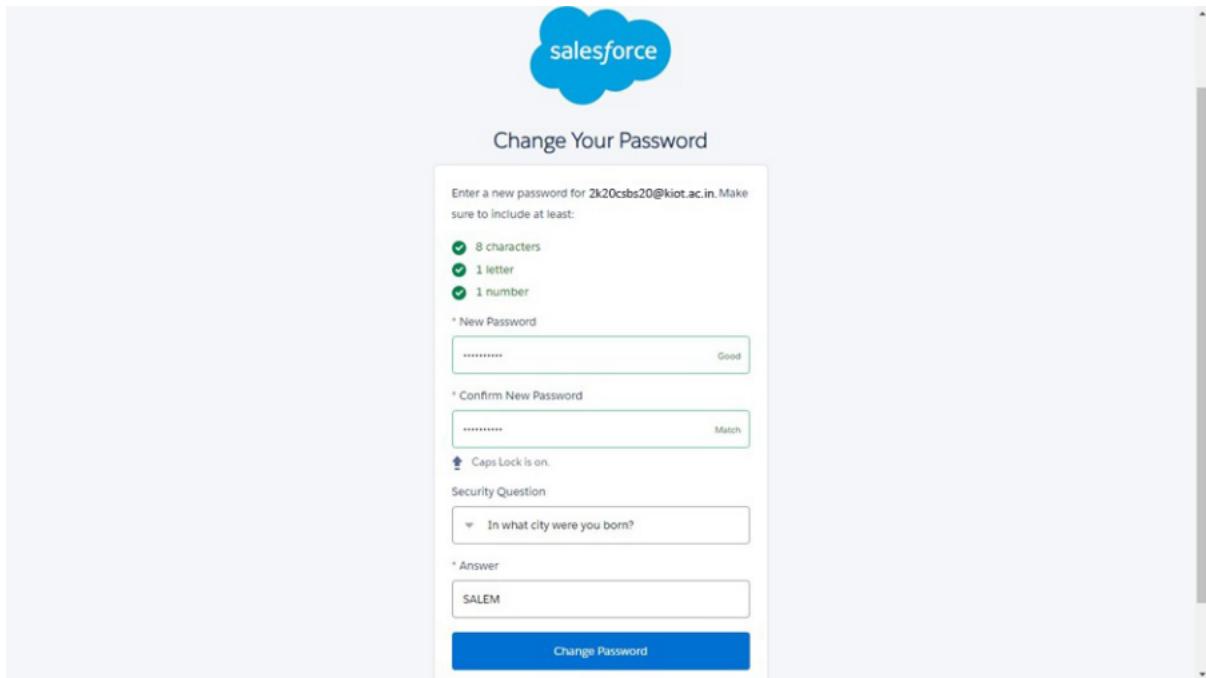
2. In the Quick Find box, type "Sharing Rules" and select "Sharing Settings."

- 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.**

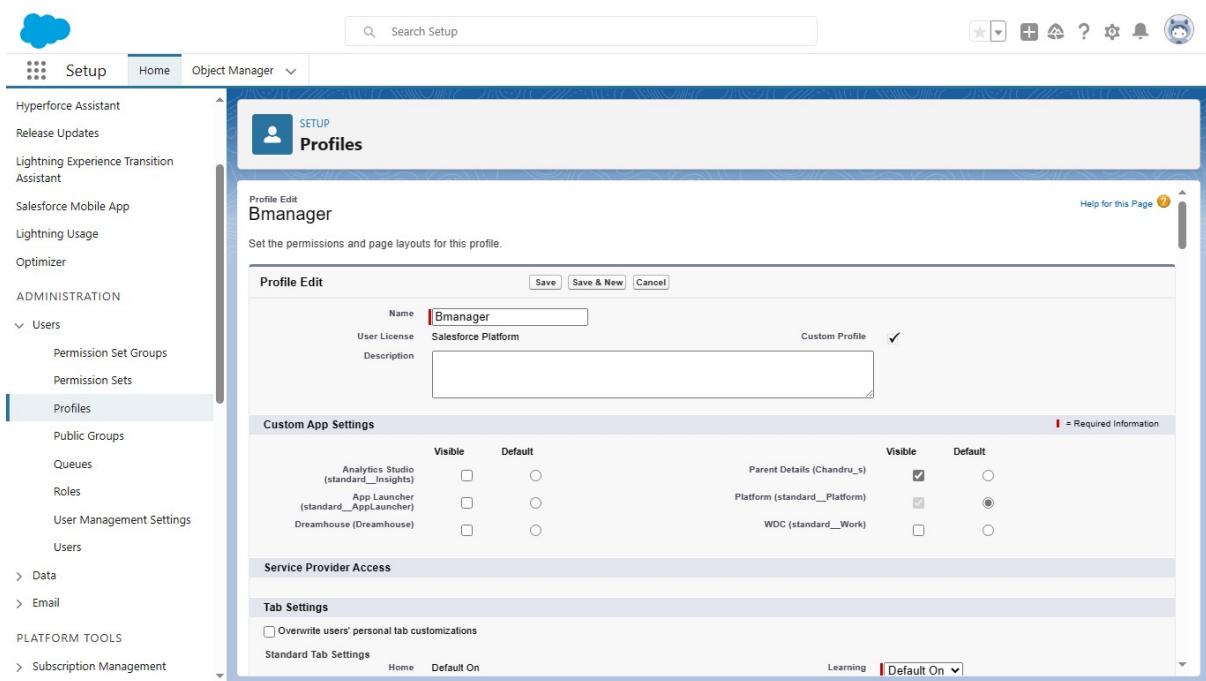


The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'Sunil A'. The user's email is listed as '2k20cse176@kiot.ac.in' with a '(Verify)' link. Other details include 'Active' status, 'Marketing User' role, and 'Male' gender. The page also lists various profiles and permissions like 'Salesforce Platform Manager', 'Service Cloud User', and 'Mobile Push Registrations'. A sidebar on the left provides navigation through various setup categories such as Administration, Data, Email, and Platform Tools.

The screenshot shows a Gmail inbox with a single email from 'developer@salesforce.com'. The subject is 'Welcome to Salesforce: Verify your account'. The email body contains a message from the Salesforce team stating 'Thanks for signing up with Salesforce!' and includes a 'Verify Account' button. Below the button, it says 'To easily log in later, save this URL:' followed by a provided URL. The email is timestamped 'Thu, Apr 21, 8:50 AM'.



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 2k20csbs20@kiot.ac.in. Make sure to include at least:" followed by three requirements with green checkmarks: "8 characters", "1 letter", and "1 number". Below this, there 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. A note below the second field says "Caps Lock is on." There are also fields for "Security Question" ("In what city were you born?") and "Answer" ("SALEM"). At the bottom 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 shows the "Profile Edit" for the "Bmanager" profile. The "Profile Edit" section has fields for Name (Bmanager), User License (Salesforce Platform), Description (Custom Profile), and a "Save" button. Below this is the "Custom App Settings" section, which lists several app settings with checkboxes for "Visible" and "Default". The "Service Provider Access" and "Tab Settings" sections are also visible. A note at the bottom right indicates "I = Required Information".

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.
- Current Page:** SETUP Profiles
- Content Area:**
 - Sharing Settings:** Contact, Contact Point Addresses, Contact Point Consents, Contact Point Emails, Push Topics, Sellers, Streaming Channels, User External Credentials.
 - Custom Object Permissions:** Basic Access (Read, Create, Edit, Delete, View All, Modify All) for Brokers, Childs, Parents, Properties.
 - 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. The main window displays the 'New User' creation page. The 'General Information' section contains fields for First Name (Sanjay), Last Name (P), Alias (sp), Email (2k20cse171@kiot.ac.in), Username (2k22cse171@kiot.ac.in), Nickname (User1696315620912300622), Title, Company, Department, and Division. To the right, there are several optional checkboxes for roles like Marketing User, Offline User, Knowledge User, etc., and a dropdown for Data.com User Type set to 'None'. Other settings include Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, and Load Lightning Pages While.

Step 3: Assign Records Ownership

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. The main window displays the 'Permission Set Create' page. It starts with an 'Enter permission set information' section where the Label is set to 'permission' and the API Name is also 'permission'. Below this is a 'Description' field with no input. Under 'Select the type of users who will use this permission set', there's a note about choosing a license type. A dropdown for 'License' is set to 'None'. At the bottom of the page are 'Save' and 'Cancel' buttons.

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

- Left Navigation Bar:** 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, and Permission Sets), Data, Email, and Platform Tools.
- Page Header:** Shows "Setup", "Home", "Object Manager", and a search bar labeled "Search Setup".
- Page Title:** "Permission Sets" under the "SETUP" tab.
- Section:** "Permission Set permission".
- Buttons:** "Find Settings...", "Clone", "Delete", "Edit Properties", "Manage Assignments".
- Links:** "Permission Set Overview" and "Object Settings".
- Table:** "Object Settings" table showing permissions for various objects. The table has columns: Object Name, Object Permissions, Total Fields, and Tab Settings. Key rows include:
 - Accounts:** No Access, 40 fields, Tab Settings --.
 - AI Insight Reasons:** No Access, -- fields, Tab Settings --.
 - AI Record Insights:** No Access, -- fields, Tab Settings --.
 - Alternative Payment Methods:** No Access, 27 fields, Tab Settings --.
 - API Anomaly Event Stores:** No Access, 14 fields, Tab Settings --.
 - App Analytics Query Requests:** No Access, -- fields, Tab Settings --.
 - Application Usage Assignments:** No Access, -- fields, Tab Settings --.
 - Appointment Categories:** No Access, 3 fields, Tab Settings --.
 - Appointment Invitations:** No Access, 17 fields, Tab Settings --.
 - Appointment Invitees:** --, 4 fields, Tab Settings --.
 - Appointment Schedule Aggregates:** No Access, -- fields, Tab Settings --.
 - Appointment Schedule Logs:** No Access, -- fields, Tab Settings --.
 - Appointment Topic Time Slots:** No Access, 6 fields, Tab Settings --.
 - Asset Actions:** No Access, 30 fields, Tab Settings --.
 - Asset Action Sources:** No Access, 18 fields, Tab Settings --.
 - Asset Relationships:** --, 10 fields, Tab Settings --.
 - Assets:** No Access, 42 fields, Tab Settings --.
 - Asset State Periods:** No Access, 11 fields, Tab Settings --.
- Bottom:** A script tag: "javascritsrcSelf%2FOP5\$000007Uxo%3Fs%3DEntityPermissions%26o%3DApIA..."

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

- Left Navigation Bar:** Same as the first screenshot.
- Page Header:** Shows "Setup", "Home", "Object Manager", and a search bar labeled "Search Setup".
- Page Title:** "Permission Sets" under the "SETUP" tab.
- Section:** "Permission Set permission".
- Buttons:** "Find Settings...", "Clone", "Delete", "Edit Properties", "Manage Assignments".
- Links:** "Permission Set Overview" and "Childs".
- Form:** "Childs" tab settings. It includes a "Tab Settings" section with "Available" and "Visible" dropdowns, and a "Save" and "Cancel" button.
- Table:** "Object Permissions" table showing permissions for various objects. The table has columns: Permission Name and Enabled. All checkboxes are checked.

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"/>
- Table:** "Field Permissions" table showing permissions for specific fields. The table has columns: Field Name, Read Access, and Edit Access. The "Created By" field has both checkboxes checked.

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"/>
- Bottom:** A script tag: "javascritsrcUp(%2FOP5\$000007Uxo%2Fe%3Fs%3DEntityPermissions%26o%3D0115j000002rl5b%26sdtp%3Dp1);"

Setup Home Object Manager

(permission) > PERMISSION SET > PERMISSION > MANAGE ASSIGNMENT EXPIRATION

Select Users to Assign

All Users

Full Name	Role	Username	Profile
Krishnaraj S	CS	au611220244020@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) > PERMISSION SET > PERMISSION > MANAGE ASSIGNMENT EXPIRATION

Select an Expiration Option For Assigned Users

No expiration date ①

Specify the expiration date ①

Time Zone ① Select a time zone...

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

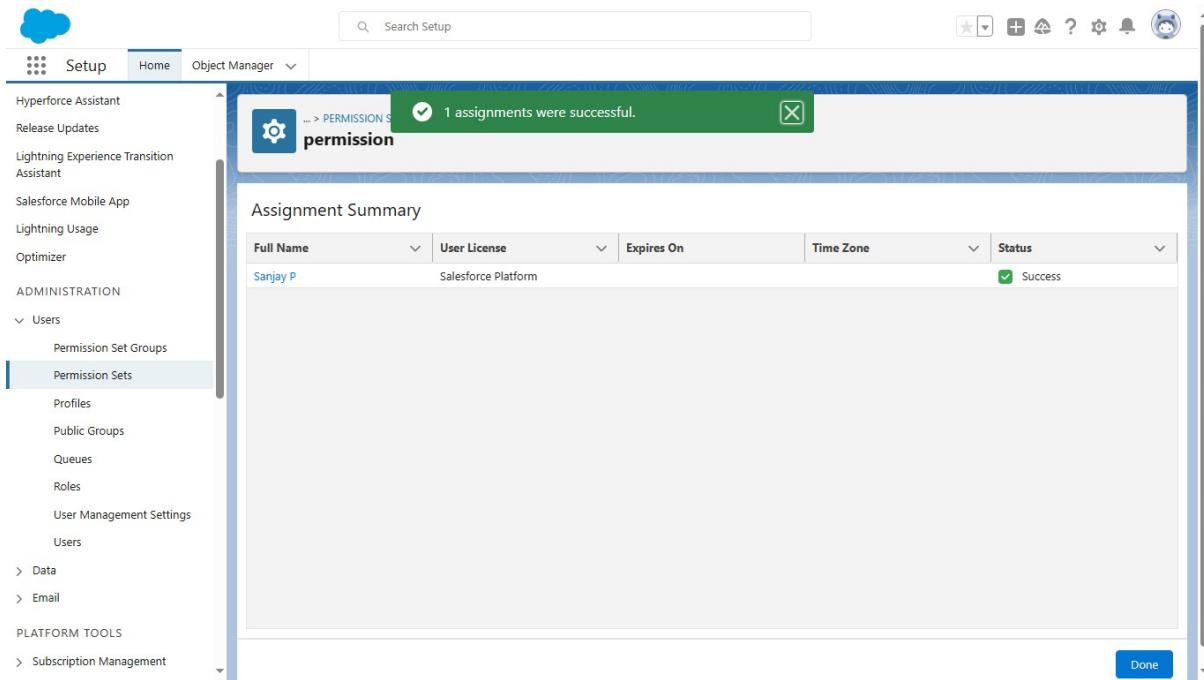
Operating Hours Holidays
Opportunities
Opportunity_Contact Role
Opportunity_Product
Order Products
Orders
Parents
Party Consents
Payment Authorization Adjustments
Payment Authorizations
Payment Gateway Logs
Payment Gateways
Payment Groups
Payment Line Invoices
Payments
Pending Order Summaries
Pending 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=01Ij000002rI5H&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:** User list table with columns: Full Name, Username, Role, Ac..., and Profile. One user, "Sanjay P", has a checked checkbox in the first 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.

Setup **Users**

All Users

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

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	A_Sathish	RR	2k21cs178@kol.ac.in		<input checked="" type="checkbox"/>	Manager
Edit	Chatter Expert	Chatter	chatty_00d50000000cmopean.eodfzliber@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	P_Sanith	RR	2k21cs171@kol.ac.in		<input checked="" type="checkbox"/>	Manager
Edit	kishnaraaj5	CS	au611220344020@naarmudhalakan.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User Integration	integ	integration@00d5000000cmopean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	ses	insightssecurity@00d5000000cmopean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

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.

Setup **Profiles**

Profiles

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

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

[New Profile](#)

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

<https://aws-36e-dev-ed.develop.lightning.force.com/one/one.app#/setup/EnhancedProfiles/home>

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, the navigation sidebar includes categories like Lightning Usage, Administration, and Platform Tools. Under Administration, the 'Users' section is expanded, showing options such as Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The 'Profiles' option is selected and highlighted with a blue bar. The main content area is titled 'Clone Profile' and displays a form for cloning a profile. It asks for the 'Existing Profile' (set to 'Standard Platform User'), 'User License' (set to 'Salesforce Platform'), and 'Profile Name' (set to 'Manager'). A note at the top states 'You must select an existing profile to clone from.' Below the form are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar is identical to the previous screenshot, with the 'Profiles' option selected. The main content area is titled 'Profile' and shows details for the 'chan' profile. It includes sections for 'Profile Detail' (Name: chan, User License: Salesforce Platform, Description: null, Created By: Chandru S., Created Date: 03/10/2023, 1:50 pm, Modified By: Chandru S., Modified Date: 03/10/2023, 1:50 pm), 'Page Layouts' (listing Standard Object Layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, and Asset, each with a 'View Assignment' link), and 'Operating Hours' (listing layouts for Order, Order Product, Payment, Payment Authorization, Payment Authorization Adjustment, and Payment Gateway, each with a 'View Assignment' link). A 'Help for this Page' button is visible in the top right corner.

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets

Require minimum 1 day password expiration

Don't immediately expire links in forgot password emails

Save | Save & New | Cancel

Setup Home

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Hyperforce Assistant

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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, Data.com User Type (selected: --None--), Data.com Monthly Additional Limit (Default Limit (300)), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, and Load Lightning Pages While.

The screenshot shows the Salesforce Setup interface. 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 shows the "User Detail" page. The user's name is Sunil A, with alias sa, email 2k20cse176@kiot.ac.in, and username 2k23cse176@kiot.ac.in. The profile is chan, and the role is Salesforce Platform. Other details include department (275), address (Kolankondai(p.o) Mallasamudram 637503 Tamil Nadu India), time zone (GMT+05:30) India Standard Time (Asia/Kolkata), locale (English (India)), language (English), and manager (Delegated Approver). The user is active and has Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations (View), Data.com User Type (i), Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts.

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". The "General Information" section contains fields for First Name (Sunil), Last Name (A), Alias (sa), Email (2k20cse176@kiot.ac.in), Username (2k21cse176@kiot.ac.in), Nickname (User169631476178576A938), Title, Company (Male), Department, and Division. To the right of these fields are dropdown menus for Role (<None Specified>, Salesforce Platform, chan), User License (Salesforce Platform), Profile (chan), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (--None--), Data.com Monthly Addition Limit (300), Accessibility Mode (Classic Only), and High-Contrast Palette on Charts. A note at the bottom states "1 and 2 instances 1000 MBs".

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: checked) and "A_Sunil" (Alias: SA, Username: 2k23cse176@kiot.ac.in, Role: chan, Active: checked). Navigation links at the bottom include New User, Reset Password(s), Add Multiple Users, and letters A through 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 a permission set named "permission01". The "Object Settings" tab is selected, and the "Accounts" section is active. The "Object Permissions" table lists permissions for the "Accounts" object:

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"/>

The "Field Permissions" table lists permissions for various fields on the Account object:

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"/>

This screenshot is identical to the one above, showing the "Permission Sets" page for "permission01" in the Salesforce Setup interface. The left sidebar and main content area are exactly the same, displaying the "Object Settings" tab and the "Accounts" section for the "Accounts" object.

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

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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
Krishnaraj S	CS	au611220244020@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

Time Zone

Select a time zone...

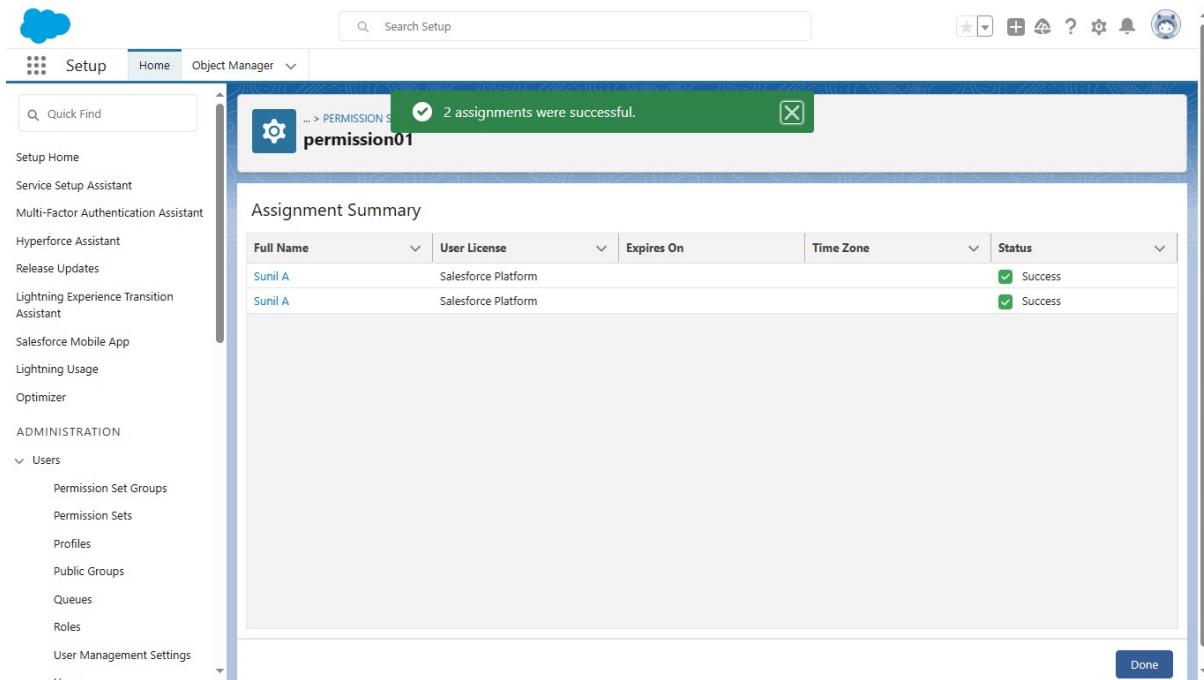
Selected Users

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 Krishnaraj S, 12/10/2023, 5: 32 PM	Last Modified By Krishnaraj S, 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"/> 																									
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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

Save Response

* API Name

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

Survey Result

Set Field Values for the Survey Result

Field

Comment__c

Value

A_a Comment

Field

Email__c

Value

A_a Email > Value

Field

Name__c

Value

{!Name.firstName} {!Name.lastName}

Field

Rating__c

Value

A_a Rating

+ Add Field

Manually assign variables

Cancel

Done

Step 4.3: Salesforce Flow – Call an Acton – 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 Krishnaraj S

Status: Active Type: Screen Flow Version Number: 2

Cancel Save

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

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

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

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

VFPageToLC.app *

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

Logs, Tests, and Problems

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	Krishnaraj S  
Default Record Owner	Krishnaraj S  
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

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.