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Salesforce
Developer(Course)
Assignment no 1

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Batch : 2024
Zone no : Zone 8

1. Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

Solution:

Step 1: Create Custom Objects

Assuming you have two custom objects, let's call them "College_C" and "C Department_C". If you haven't already created these objects, you can do so by going to Setup > Object Manager > Create > Custom Object.

Setup Home Object Manager

New Custom Object

Permissions for this object are granted for all profiles by default. You can provide object permissions to permission sets or to existing system profiles. [Set up object permissions](#) [Set object permissions](#)

Custom Object Definition Edit: Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in lists, single records, and reports.

Label: Example: Account

Plural Label: Example: Accounts

Starts with word plural: ☐

The object name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Custom-Related Help Setting: ☒ Open the standard Salesforce help & training window ☐ Open a custom page in Salesforce page

Custom Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, lists, lists, related lists, reports, 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: Example: Account Name

Field Type:

Optional Features

☐ Allow Reports
☐ Allow Audits
☐ Track Field History
☐ Allow in Chatter Group
☐ Enable Learning AI

Object Classification

When these settings are enabled, this object is classified as an External Application object. When these settings are disabled, the object is classified as a Light Application object. Learn more.

☒ Allow Sharing
☒ Allow Bulk API Access
☒ Allow Streaming API Access

Deployment Status

[What's New?](#)

☐ In Development
☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

☐ Allow Search

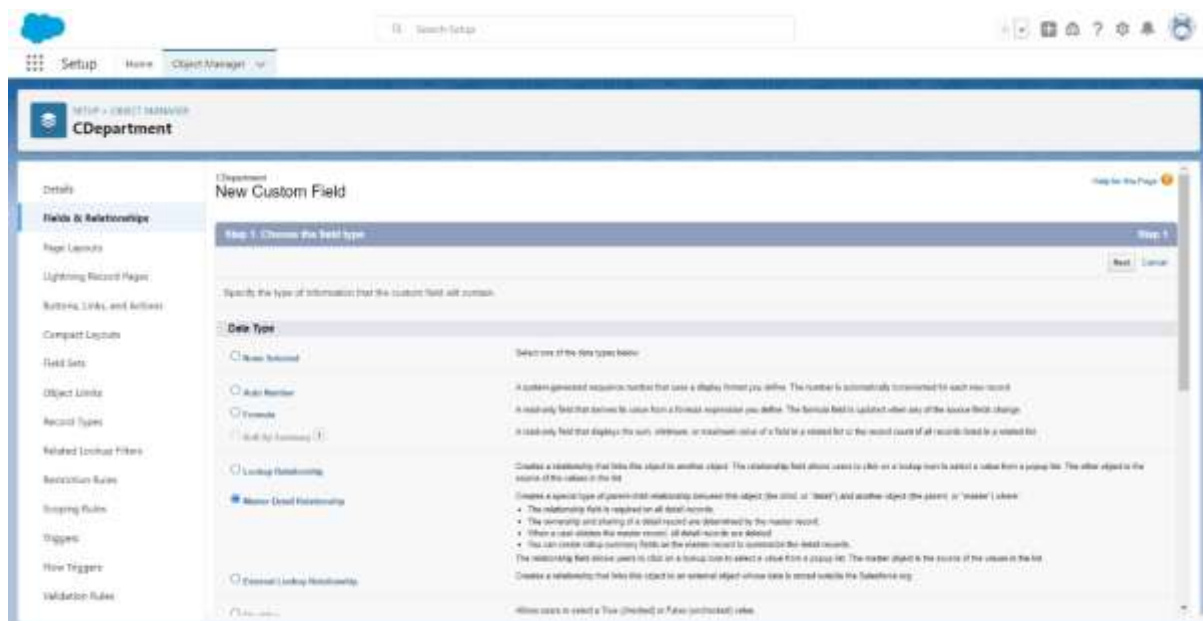
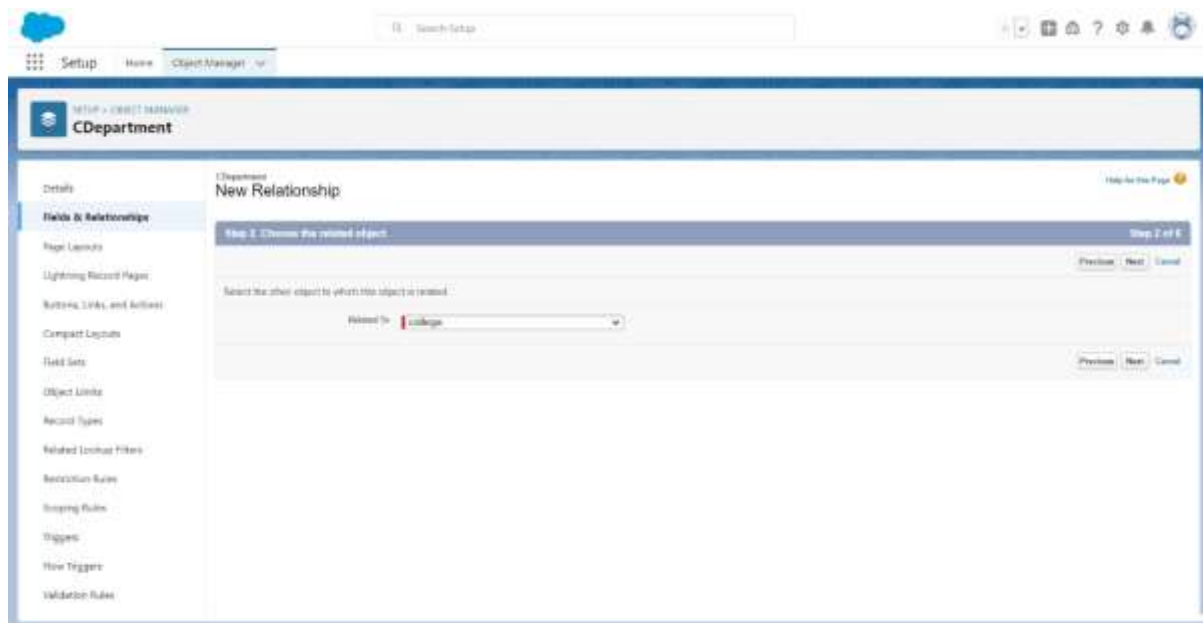
Object Creation Options (Available only when custom object is first created)

☐ Add Mobile and Tablets links without first to desktop page layout
☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

Second custom objects, let's call them
"Department_C"

3. In the left sidebar, click on "Fields & Relationships."
4. Click the "New" button to create a new custom field.
5. Choose "Master-Detail Relationship" as the data type.
6. Enter a label for the relationship, e.g., "Department __c."
7. Choose " Department__c" as the related object.
8. Configure other settings as needed and click "Next."
9. Specify the field-level security and add it to relevant page layouts.
10. Click "Next" and "Save" to create the relationship.



Step 3: Create the Roll Up Summary Field

Now, let's create a Roll Up Summary Field on the "College__c" to calculate the total number of related records "Department__c".

- 1 Still on the "College__c" settings, go to "Fields & Relationships."

1. Still on the "College__c" settings, go to "Fields & Relationships."
2. Click the "New" button to create a new custom field.
3. Choose "Roll Up Summary" as the data type.
4. Enter a label for the field, e.g.
5. Choose "Count" as the Roll Up Type.
6. Select "Department__c" as the object to roll up information from.
7. Specify the filter criteria if you want to filter the related records.
8. Configure other settings as needed and click Next.
9. Specify the field-level security and add it to relevant page layouts.
10. Click Next and Save to create the Roll Up Summary Field.

[Setup](#)
[Home](#)
[Object Manager](#)

Setup > OBJECT MANAGER
CDepartment

[Details](#)
[Fields & Relationships](#)
[Page Layouts](#)
[Lightning Record Pages](#)
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[Compact Layouts](#)
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[Restriction Rules](#)
[Grouping Rules](#)
[Triggers](#)
[Flow Triggers](#)
[Validation Rules](#)

Fields & Relationships
 4 Items, Sorted by Field Label

[Add](#)
[Delete Fields](#)
[Field Dependencies](#)
[Servicing Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college	college_c	Master-Detail(College)		✓
Created By	CreatedBy	Lookup(User)		
Department Name	Name	Text(80)		✓
Last Modified By	LastModifiedBy	Lookup(User)		

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Setup
Tabs

[Q. tabs](#)

[User Interface](#)
[Developer Tools](#)
[Tools & Settings](#)

[Become a Tab and Label](#)

[Tabs](#)

(Don't find what you're looking for? Try using Global Search.)

Custom Tabs
 You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
 Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs
[New](#)
[10/26/23 7:54:07](#)

Action	Label	Tab Style	Description
Edit	Delete	New	
Edit	Delete	New	
Edit	Delete	New	

Web Tabs
[New](#)
[10/26/23 7:54:07](#)

No Web Tabs have been defined.

Visualforce Tabs
[New](#)
[10/26/23 7:54:07](#)

No Visualforce Tabs have been defined.

Lightning Component Tabs
[New](#)
[10/26/23 7:54:07](#)

No Lightning Component tabs have been defined.

Lightning Page Tabs
[New](#)
[10/26/23 7:54:07](#)

No Lightning Page Tabs have been defined.

SetupHomeObject Manager

college

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LinksRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesTriggersFlow TriggersValidation Rules

college

New Custom Field

Help for this Page

Step 3 of 6

Step 3: Add to page layouts

PreviousSave & NewSaveCancel

Field Label	Total count
Field Type	Roll-Up Summary
Field Name	Total_count
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of the field on the page, you will need to customize the page layout.

☒ Add Field / Page Layout Name

☒ college Layout

When finished, click Save & New to create more custom fields, or Click Save if you are done.

PreviousSave & NewSaveCancel

SetupHomeObject Manager

college

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LinksRecord TypesRelated Lookup FiltersRestriction RulesScoping RulesTriggersFlow TriggersValidation Rules

college

New Custom Field

Help for this Page

Step 4 of 6

Step 4: Select field-level security

PreviousNextCancel

Field Label	Total count
Field Type	Roll-Up Summary
Field Name	Total_count
Description	

Select the profiles to which you want to grant edit access to the field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Viewer User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Work Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Page Admin - Asset Submitter (test)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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[Page Layouts](#)
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[Restriction Rules](#)
[Grouping Rules](#)
[Triggers](#)
[Flow Triggers](#)
[Validation Rules](#)

New Custom Field

[Help for this Page](#)

Step 1: Define the summary calculation

Step 2 of 3

Previous

Next

Cancel

Select Object to Summarize

Master Object

college

Summarized Object

CDReportTransact

Required Information

Select Roll-Up Type

COUNT

SUM

MIN

MAX

Field to Aggregate

Rollup

Filter Criteria

All records should be included in the calculation

Only records meeting certain criteria should be included in the calculation

Previous

Next

Cancel

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[Flow Triggers](#)
[Validation Rules](#)

New Custom Field

[Help for this Page](#)

Step 1: Enter the details

Step 2 of 3

Previous

Next

Cancel

Field Label

Total count

Field Name

Total_count

Description

Help Text

Add this field to existing report type

Add this field to existing custom report types that contain this entity

Previous

Next

Cancel

Step 1: Choose the field type

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

Data Type

- ☐ Name-Related: Select one of the data types below.
- ☐ Auto Number: A system-generated sequential number that can be displayed in a format you define. The number is automatically incremented for each new record. It is 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.
- ☐ Formula: A read-only field that displays the sum, difference, or calculated value of a field in a record or the record count of all records based on a related list.
- ☐ Roll-Up Summary: Create a relationship that lets the 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.
- ☐ Lookup Relationship: Create a special type of parent-child relationship between the 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 creates the master record, all detail records are deleted.
 - You can create roll-up summary fields on the master record to summarize the detail records.
 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list. Create a relationship that lets the object to an external object whose data is stored outside the Salesforce org.
- ☐ Master-Detail Relationship: Create a relationship that lets the 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.
- ☐ External Lookup Relationship: Create a relationship that lets the object to an external object whose data is stored outside the Salesforce org.
- ☐ Picklist: Allow users to select a True (checked) or False (unchecked) value.

Fields & Relationships
4 items, sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
college Name	Name	Text(255)		✓
Created By	CreatedById	Lookup(128)		
Last Modified By	LastModifiedById	Lookup(128)		
Owner	OwnerId	Lookup(128, 01mng)		✓

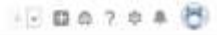
Step 4: Create a Lightning App

1. Type and select "App Manager".
2. Click "New Lightning App".
3. Fill in basic information (Name

3. **Fill in the App Information (Name, Developer Name, Description).**
4. **Choose the App Type (Standard, Console Custom).**
5. **Customize the Logo and Colour Scheme.**
6. **Configure Navigation Items (objects to appear in the app's menu).**
7. **Set the App Visibility (default access).**
8. **Optionally, choose Record Pages (Lightning Record Pages).**
9. **Review and Save the app.**
10. **Assign the app to users or profiles.**
11. **Test the app with the assigned users.**



Search Setup



Setup

Home Object Manager

Q. Help

User Interface

Rename **Tab** and Label

Tab

Didn't find what you're looking for?
Try using Global Search.



Setup

New Custom Object Tab

Help for this Page

Step 2: Add to Profiles

Step 2 of 3

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the related and edit pages of each profile.

- ☒ Apply one tab visibility to all profiles (Default On)
- ☐ Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Mobile	Default On
Authenticated Mobile	Default On
Cloud Kiosk Admin	Default On
Contract Manager	Default On
Cloud Qig Data Prep User	Default On
Customer Marketing Profile	Default On
Customer Sales Profile	Default On
Customer Support Profile	Default On
Customer	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On
Customer Portal Manager - Custom	Default On
Customer Portal Manager - Standard	Default On
External Appx Login user	Default On
External Identity User	Default On
Force.com - App Subscription User	Default On
Force.com - Free User	Default On
Gold Partner User	Default On
High Income Customer Portal	Default On
High Income Customer Portal user	Default On
Identity User	Default On
Manager	Default On
Marketing User	Default On
Minimum Access - Salesforce	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Research Manager	Default On
Research User	Default On
Salesforce API Only System Integration	Default On
Sales User	Default On
Security Profile	Default On
Service Engineer User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

Previous Next Cancel

Setup

Home

Object Manager

User Interface

Remove Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

Setup

Tabs

New Custom Object Tab

Help for this Page

Step 1. Select the Objects

Step 1 of 5

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object.

Object:

Tab Style:

(Optional) Choose a Home Page Custom Link to show on a splash page the first time user clicks on this tab.

Splash Page Custom Link:

Enter a short description.

Description:

Setup

Home

Object Manager

User Interface

Remove Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

Setup

Tabs

Step 2. Add to Custom Apps

Step 2 of 5

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input checked="" type="checkbox"/> Include Tab
Performance (standard__Performance)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Service Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal user	<input checked="" type="checkbox"/>
Authenticated Mobile User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Site)	<input checked="" type="checkbox"/>
Telephony Center (standard__Center)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Rules Console (standard__LightningRulesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Rules (standard__LightningRules)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningUsageApp)	<input checked="" type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
Bot Solutions (standard__LightningBot)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Exclude tab to user's existing personal customizations	

Search Setup

Setup

Home

Object Manager

Q: info

User Interface

Review Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

New Custom Object Tab

Help for this Page

Step 1. Select the Object

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new one.

Object: **CDocument**

Tab Style: **Lightning**

(Optional) Choose a Home Page Custom Link to show on a splash page the first time user clicks on this tab.

Splash Page Custom Link: **None**

Enter a short description:

Description

Next Cancel

Search Setup

Setup

Home

Object Manager

Q: info

Salesforce Mobile App

Data

Mass Transfer AppInstall Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Role Catalog

Lightning Bolt Solutions

Mobile Apps

Selections

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Packaging

Installed Packages

SETUP

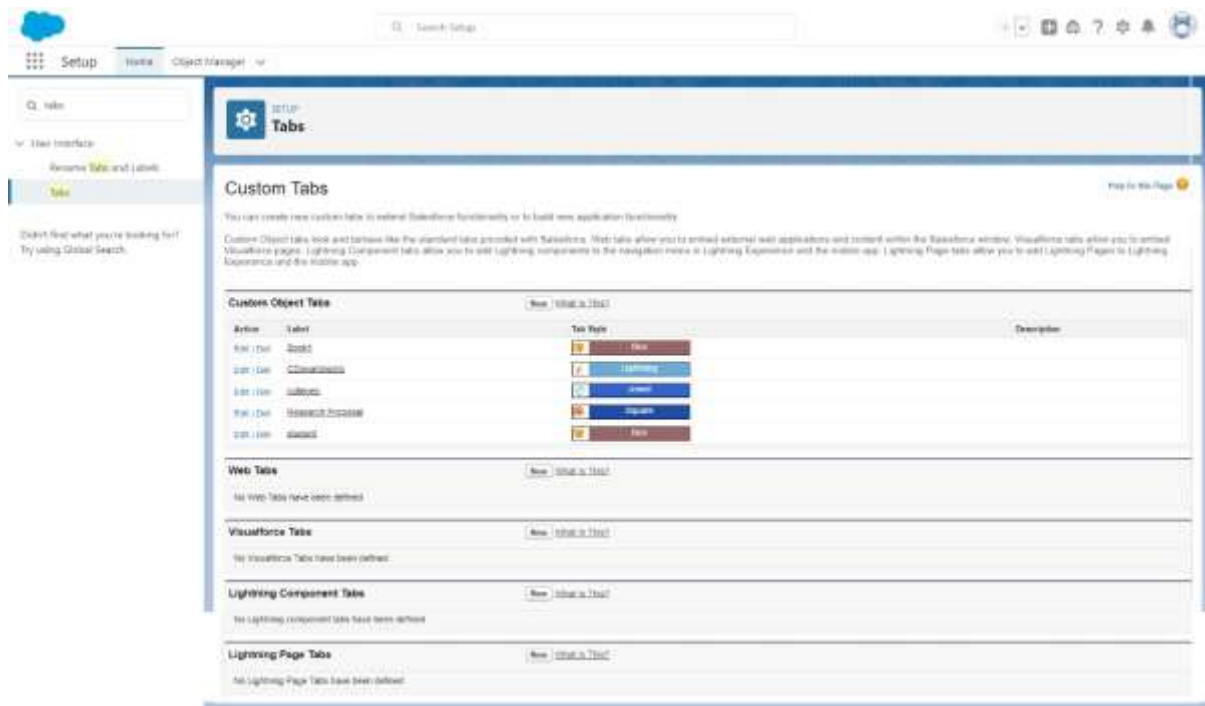
Lightning Experience App Manager

New Lightning App

New Connected App

22 items • Sorted by App Name • Filtered by All app categories • Tabset Type

	App Name	Developer Name	Description	Last Modified Date	App	Val
1	All Tabs	AltTabset		14/07/2021 10:47 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14/07/2021 10:47 am	Classic	
3	App Launcher	AppLauncher	App Launcher tabs	14/07/2021 10:47 am	Classic	
4	Bot Solution	LightningBot	Discover and manage business solutions designed for your industry	14/07/2021 10:47 am	Lightning	
5	Community	Community	Salesforce CRM Communities	14/07/2021 10:47 am	Classic	
6	Content	Content	Salesforce CRM Content	14/07/2021 10:47 am	Classic	
7	Data Manager	DataManager	Use Data Manager to view facts, monitor usage, and manage widgets	14/07/2021 10:47 am	Lightning	
8	Digital Experience	SalesforceDX	Manage content and media for all of your sites	14/07/2021 10:47 am	Lightning	
9	Lightning Usage App	LightningUsageExtension	View Adoption and Usage statistics for Lightning Experience	14/07/2021 10:47 am	Lightning	
10	Marketing	Marketing	Step in close on-demand marketing automation	14/07/2021 10:47 am	Classic	
11	Platform	Platform	The fundamental Lightning Platform	14/07/2021 10:47 am	Classic	
12	Queue Management	QueueManagement	Create and manage queues for your business	14/07/2021 10:47 am	Lightning	
13	Sales	Sales	The world's most popular sales force automation (SFA) solution	14/07/2021 10:47 am	Classic	
14	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	14/07/2021 10:47 am	Lightning	
15	Sales Console	LightningSalesConsole	Lightning Experience! Let's sales reps work with multiple records on one screen	14/07/2021 10:47 am	Lightning	
16	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	14/07/2021 10:47 am	Classic	



Conclusion:

Now, whenever you create or update a record in the "Department__c" related to a "College__c", the "College__c" will automatically update to show the total number of related records. Remember to adjust field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your organization's requirements.

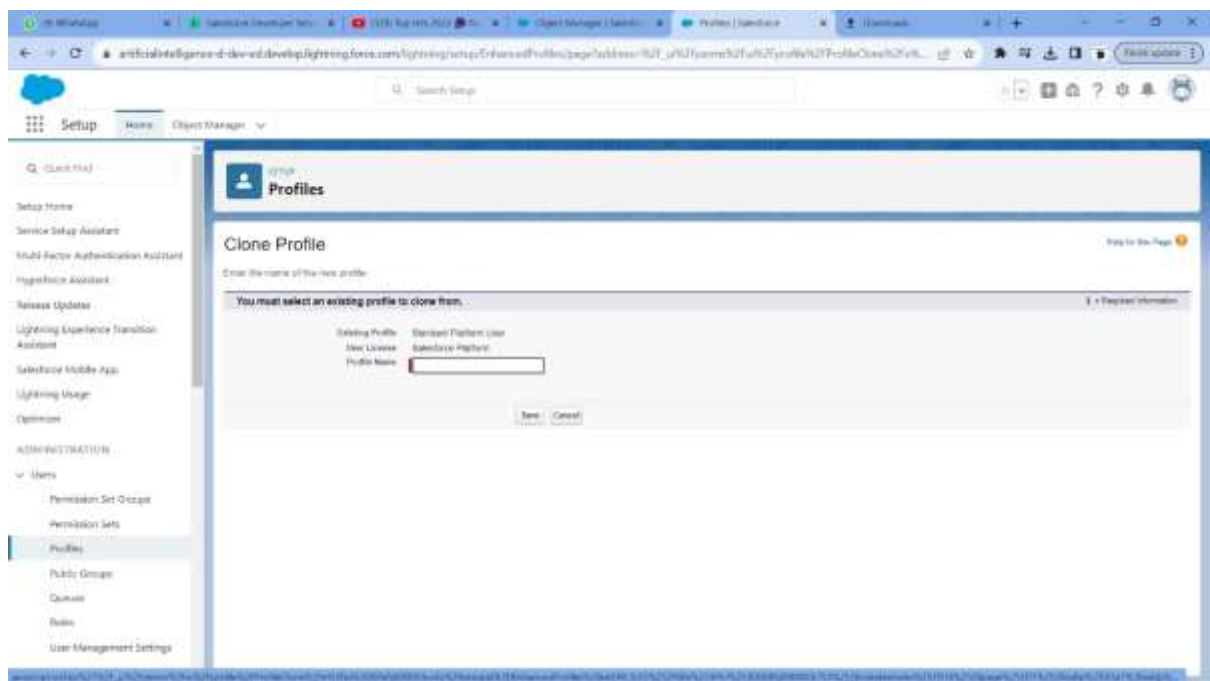
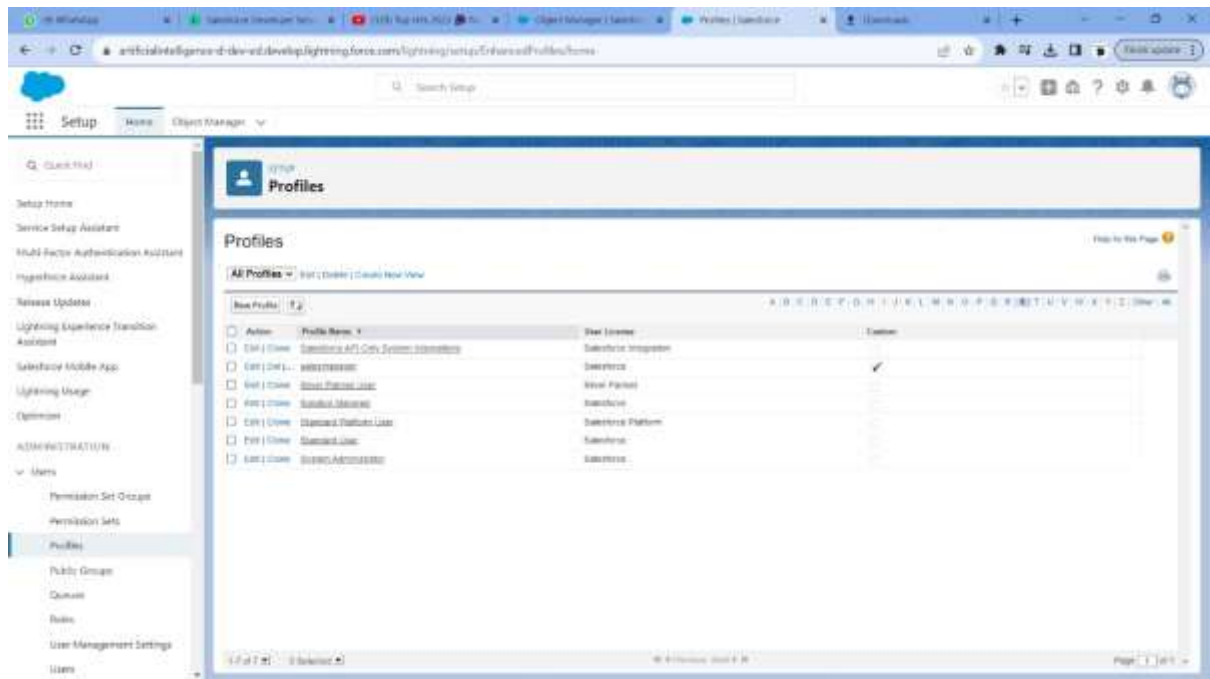
Related

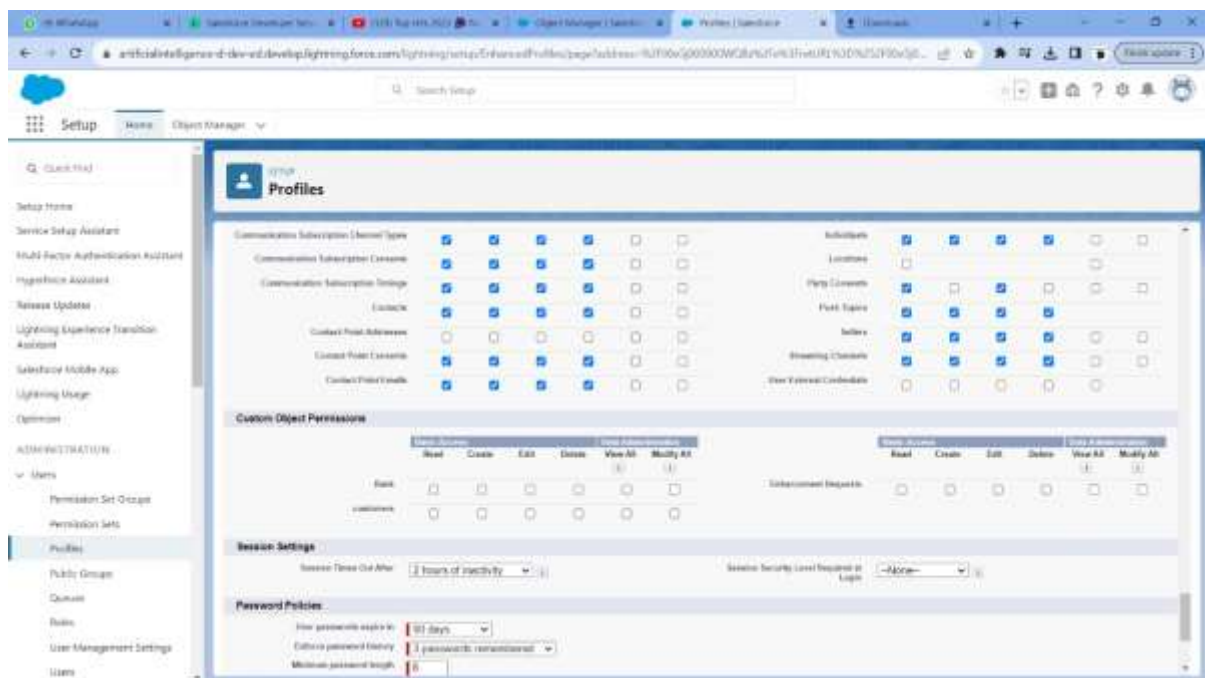
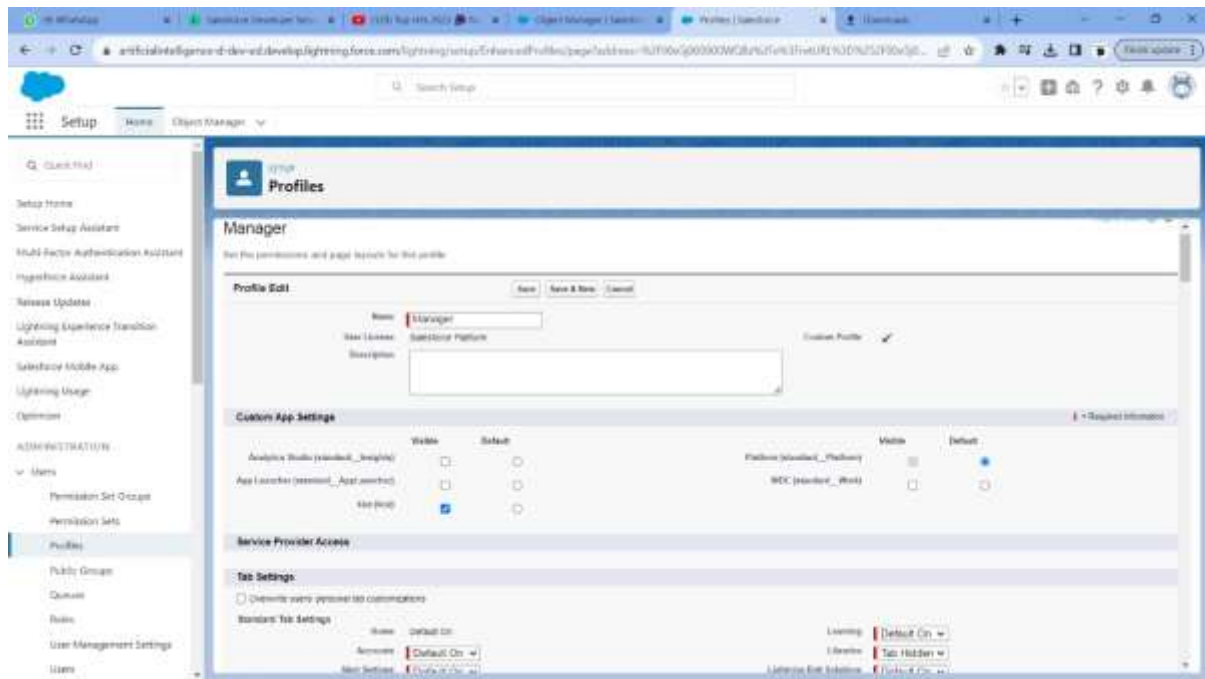
Details

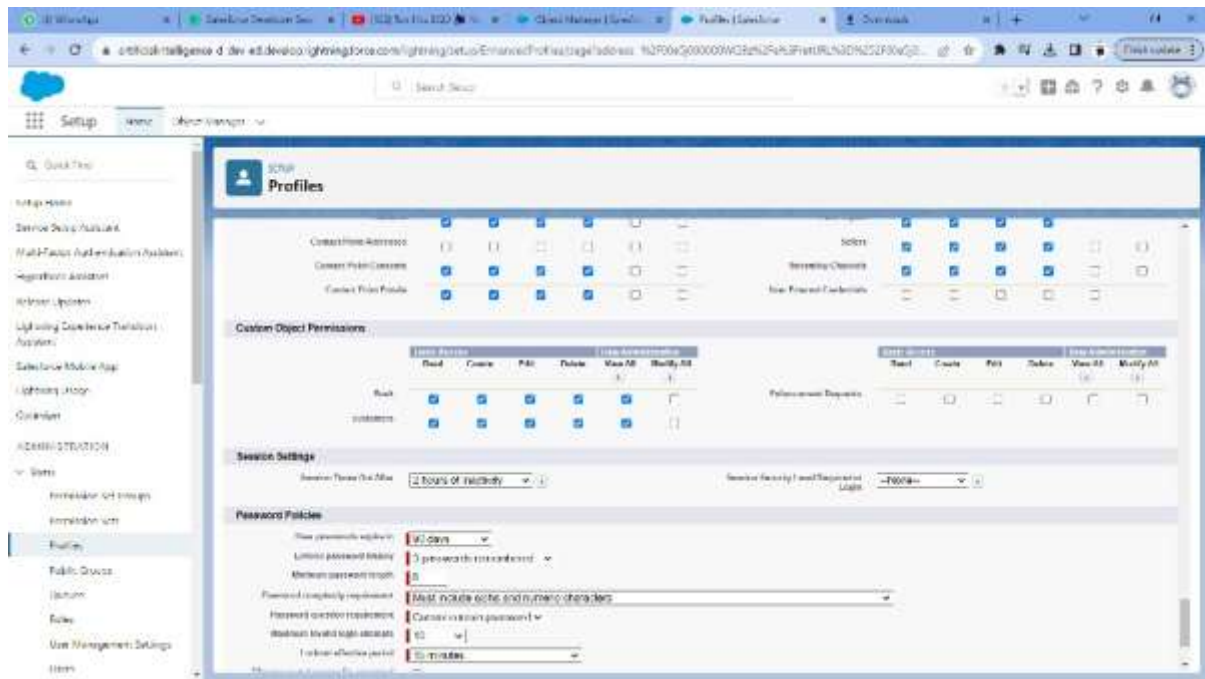
College Name	Details
mecw	 kristina.s
Total count	
2	
Phone	
9587116411	
Email	
kece@gmail.com	
Location	
35.80	
Created by	Last Modified by
 kristina.s 3/1/2022 11:18 am	 kristina.s 3/1/2022 11:18 am

Solution:

[illegible]







Setup | Profiles | Custom Object Permissions

Profiles

Custom Object Permissions

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

Custom Object Permissions

Session Settings

Session Timeout After: 2 hours of inactivity (s)

Session Security Level Required at Login: None (s)

Password Policies

How passwords expire in: 30 days

Enforce password history: 1 passwords remembered

Minimum password length: 8

Password complexity requirements: Must include alpha and numeric characters

Password expiration requirements: Cannot contain password

Maximum failed login attempts: 5

Lockout effective period: 15 minutes

Others users cannot log password: ☐

Require a minimum 1 day password rotation: ☐

Don't automatically expire links to login password resets: ☐

Setup | Users

Users

All Users

On this page you can create, view, and manage users. In addition, download Salesforce to view and edit user details, reset passwords, and perform other administrative tasks from your mobile device. [Get App](#)

View: All Users | Add | Create New User

	Full Name	Role	Username	Profile
<input type="checkbox"/>	Admin User	Admin	admin@salesforce.com	System Administrator
<input type="checkbox"/>	Chatter User	Chatter	chatter@salesforce.com	Chatter Free User
<input type="checkbox"/>	Chatter User	Chatter	chatter@salesforce.com	Standard Platform User
<input type="checkbox"/>	Chatter User	Chatter	chatter@salesforce.com	System Administrator
<input type="checkbox"/>	User Administration	User	user@salesforce.com	System Administrator
<input type="checkbox"/>	User Security	User	user@salesforce.com	System Administrator

[New User](#) [Reset Passwords](#) [Add Multiple Users](#)

Setup Users

New User

Save Save & New Cancel

General Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Language:

Department:

Business:

Role:

New License:

Profile:

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service (Read-Only): ☐

Service (Full-Range User): ☐

Maximum Publishable User: ☐

SEC User: ☐

Resource User Type:

Two-Factor Monthly Addition Limit:

Accessibility Mode (Classic Only): ☐

High-Contrast Palette (in Classic): ☐

Load Lightning Pages While Browsing: ☒

Debug Mode: ☐

Setup Users

New User

Save Save & New Cancel

General Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Language:

Department:

Business:

Role:

New License:

Profile:

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service (Read-Only): ☐

Service (Full-Range User): ☐

Maximum Publishable User: ☐

SEC User: ☐

Resource User Type:

Two-Factor Monthly Addition Limit:

Accessibility Mode (Classic Only): ☐

High-Contrast Palette (in Classic): ☐

Load Lightning Pages While Browsing: ☒

Debug Mode: ☐

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Design System, Optimizer, and Admin Tools. The main content area is titled 'Users' and shows the profile for 'sowmya bala'. The profile details include Name, Email, Username, Password, First Name, Last Name, Company, Department, Division, Job Role, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, and Two-Factor Auth. The 'Roles' section lists various roles assigned to the user, such as Salesforce Platform, Marketing User, CRM User, Knowledge User, Flow User, Service Cloud User, and others.

The screenshot shows a Gmail inbox with a welcome email from Salesforce. The email is from 'support@salesforce.com' and is titled 'Welcome to Salesforce!'. The email content includes a 'Verify Account' button, a link to the user's profile, and a message saying 'Welcome to Salesforce!'. The email is dated '11:11 PM, 11/11/2023'.

artificialintelligence-dev-ed.developer.salesforce.com

Change Your Password

Enter a new password for 2k211@kakt.us. Your new password must include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

Confirm New Password

Security Question

Answer

Change Password

Password was last changed on 03/28/2023, 7:33 pm.

login | Salesforce

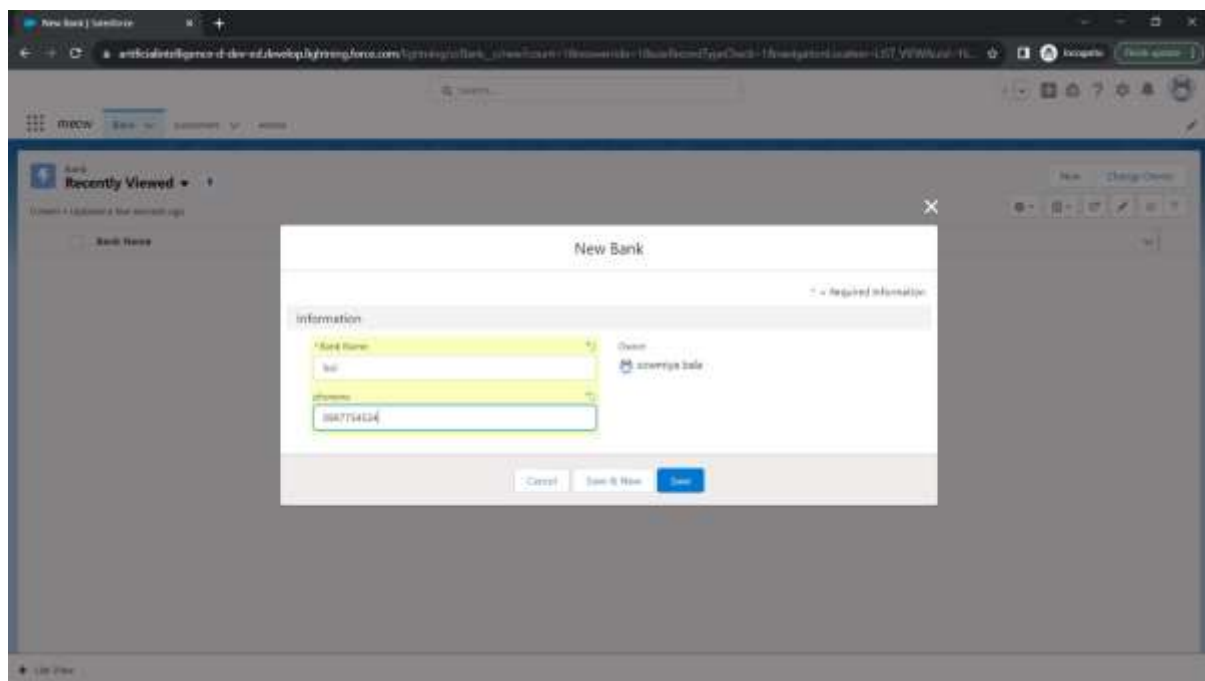
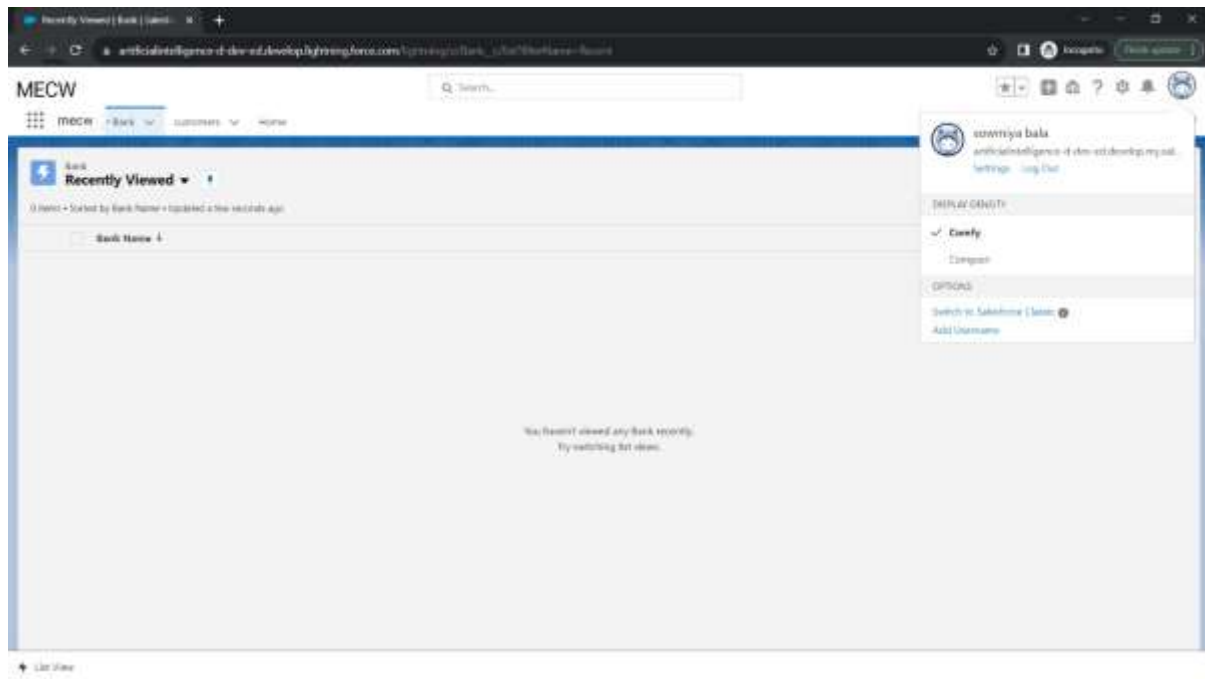
artificialintelligence-dev-ed.developer.salesforce.com

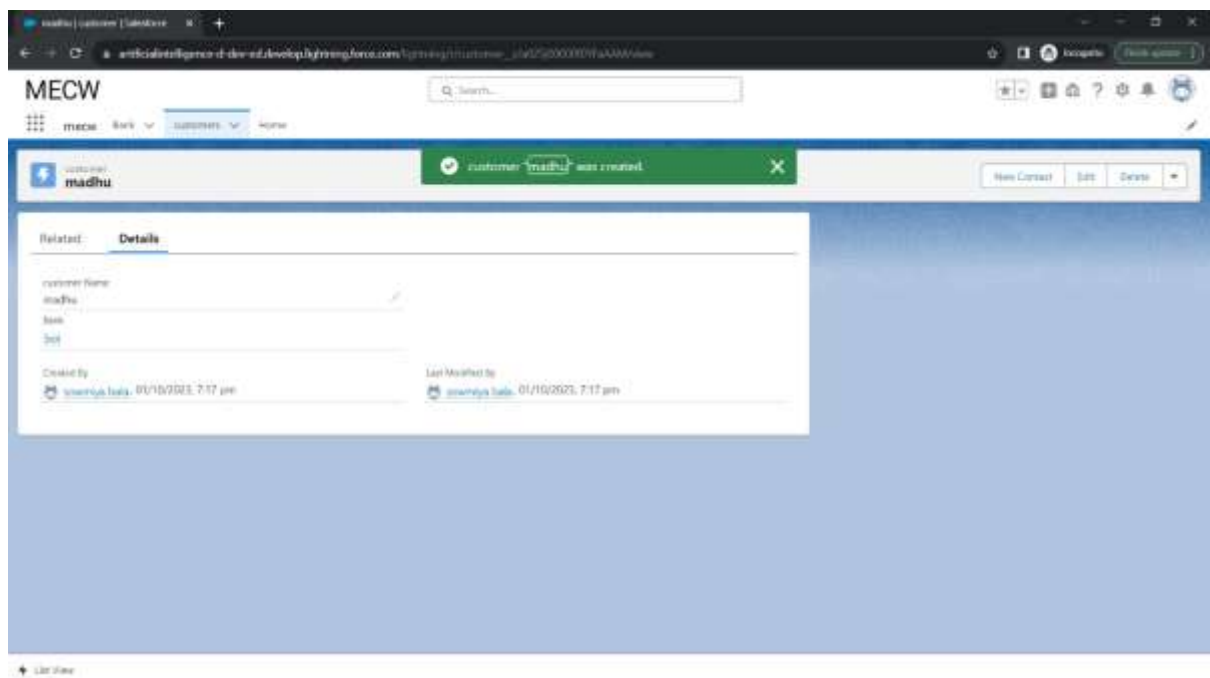
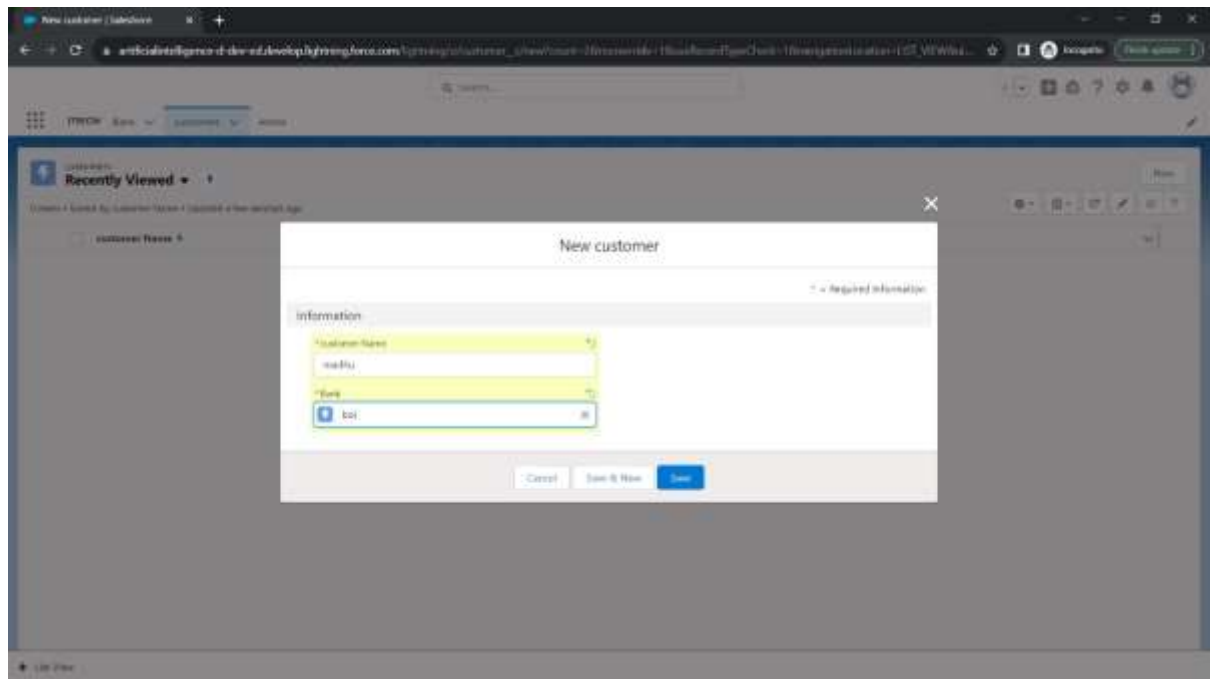
Join us for the future of trusted enterprise AI, streaming on Salesforce+.

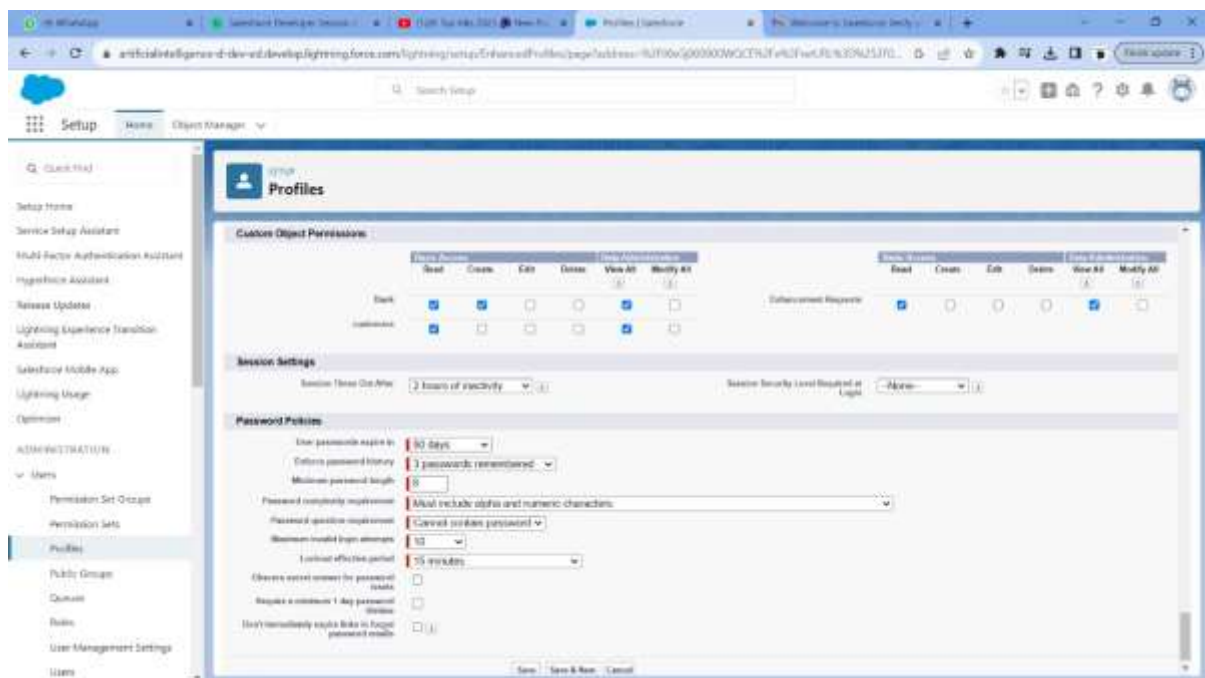
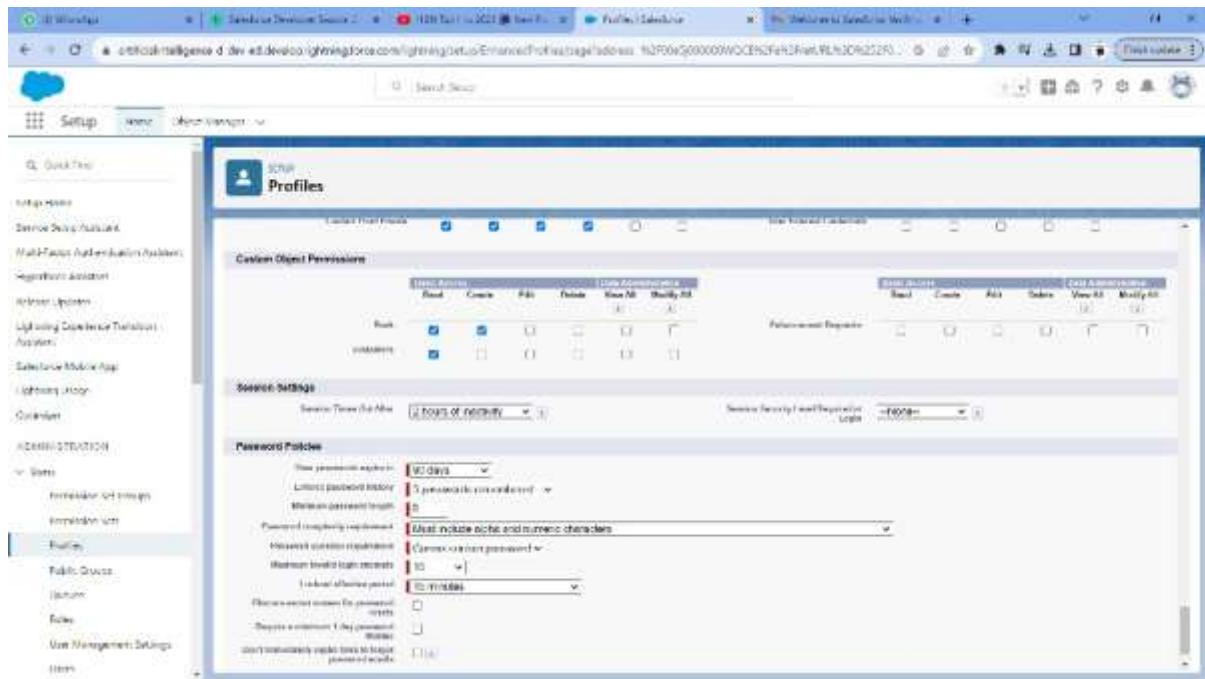
WATCH ON DEMAND

AI Day

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Setup | Home | Object Manager

Search Setup

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Quota
Roles
User Management Settings
Users

Setup Settings
Data.com
Proportionality
Service
Embedded Service
Messaging for In-App and Web User
Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu

New User

Help to this Page

User Edit Save Save & New Cancel

General Information

First Name
Last Name
Alias
Email
Username
Nickname
Title
Fingerprint
Department
Division

Role
New Username
Profile
Active
Marketing User
Offline User
Knowledge User
Flow User
Service (Lead User)
Business Function User
Business Publisher User
BEC User
Resource User Type
Two-step Monthly Addition Limit
Accessibility Mode (Desktop Only)
High-contrast Pages on (Dark)
Load Lightning Pages While scrolling
Debug Mode

Role:
New Username:
Profile:
Active: ☒
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flow User: ☐
Service (Lead User): ☐
Business Function User: ☐
Business Publisher User: ☐
BEC User: ☐
Resource User Type:
Two-step Monthly Addition Limit:
Accessibility Mode (Desktop Only): ☐
High-contrast Pages on (Dark): ☐
Load Lightning Pages While scrolling: ☒
Debug Mode: ☐

Setup | Home | Object Manager

Search Setup

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
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User Management Settings
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New User

Help to this Page

User Edit Save Save & New Cancel

General Information

First Name
Last Name
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Email
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Role
New Username
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Offline User
Knowledge User
Flow User
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Resource User Type
Two-step Monthly Addition Limit
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First Name:
Last Name:
Alias:
Email:
Username:
Nickname:
Title:
Fingerprint:
Department:
Division:

Role:
New Username:
Profile:
Active: ☒
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flow User: ☐
Service (Lead User): ☐
Business Function User: ☐
Business Publisher User: ☐
BEC User: ☐
Resource User Type:
Two-step Monthly Addition Limit:
Accessibility Mode (Desktop Only): ☐
High-contrast Pages on (Dark): ☐
Load Lightning Pages While scrolling: ☒
Debug Mode: ☐

Setup | Home | Object Manager

Search Setup

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users

Setup Settings
Database
Proprietary Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
Add More

Users

Mailing Address

Street
City
Zip/Postal Code
State/Province
Country

Single Sign-On Information

External ID

Locale Settings

Time Zone: GMT+05:30 India Standard Time (Asia/Kolkata)
Locale: English (India)
Language: English

Approver Settings

Designated Approver
Reviewer: Only if I am an approver
☒ Generate new password and notify user immediately

Save | Save & New | Cancel

Setup | Home | Object Manager

Search Setup

Users

Permission Set Groups
Permission Sets
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Roles
User Management Settings
Users

Setup Settings
Database
Proprietary Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
Add More

Users

Mailing Address

Street: 5114 - Jayaraman, Chennaisalem
City: SALEM
Zip/Postal Code: 626008
State/Province: TAMIL NADU
Country

Single Sign-On Information

External ID

Locale Settings

Time Zone: GMT+05:30 India Standard Time (Asia/Kolkata)
Locale: English (India)
Language: English

Approver Settings

Designated Approver
Reviewer: Only if I am an approver
☒ Generate new password and notify user immediately

Save | Save & New | Cancel

Change Your Password | Salesforce

salesforce

Change Your Password

Enter a new password for **2620cat@kkt.ac.in**. Make sure to include at least:

- 8 characters
- 2 letters
- 1 number

* New Password

* Confirm New Password

Security Question

What city were you born in?

* Answer

India

Password was last changed on 03/28/2023, 7:04 pm.

Recently Viewed | Book | Salesforce

MECW

Search...

MECW Books Customers Home

Recently Viewed

0 items • Updated a few seconds ago

Book Name

You haven't viewed any Book recently.
By watching the video...

Step 2:

Permission Sets:

- Create two permission sets, one for User A and one for User B.

Object-Level Security:

- In each profile and permission set, set the object-level security for the Account object to "Read" to ensure that both I-Jser A and I-Jser B can view Account records.

Record-Level Security:

- Implement record-level security using Criteria-Based Sharing Rules.
- Create a sharing rule that shares Account records owned by User A with User A and records owned by IJser B with user B.
- For the sharing rule criteria, specify that records owned by User A are shared with user A, and records owned by User B are shared with User B.

Ownership:

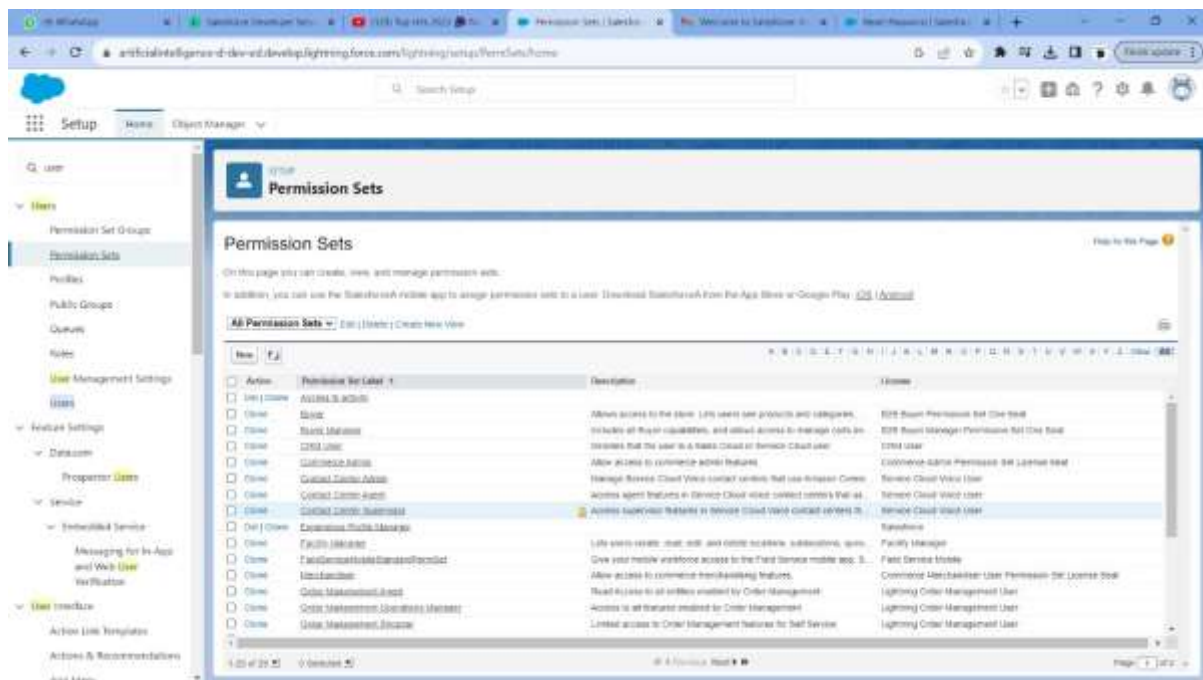
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

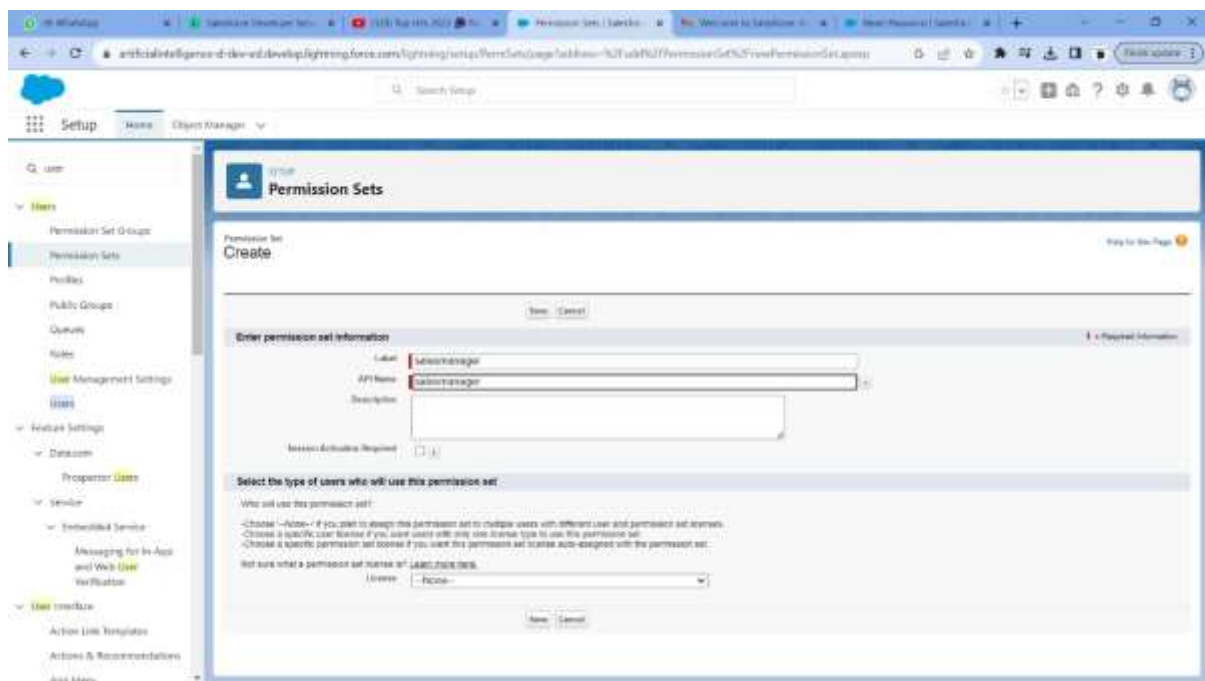
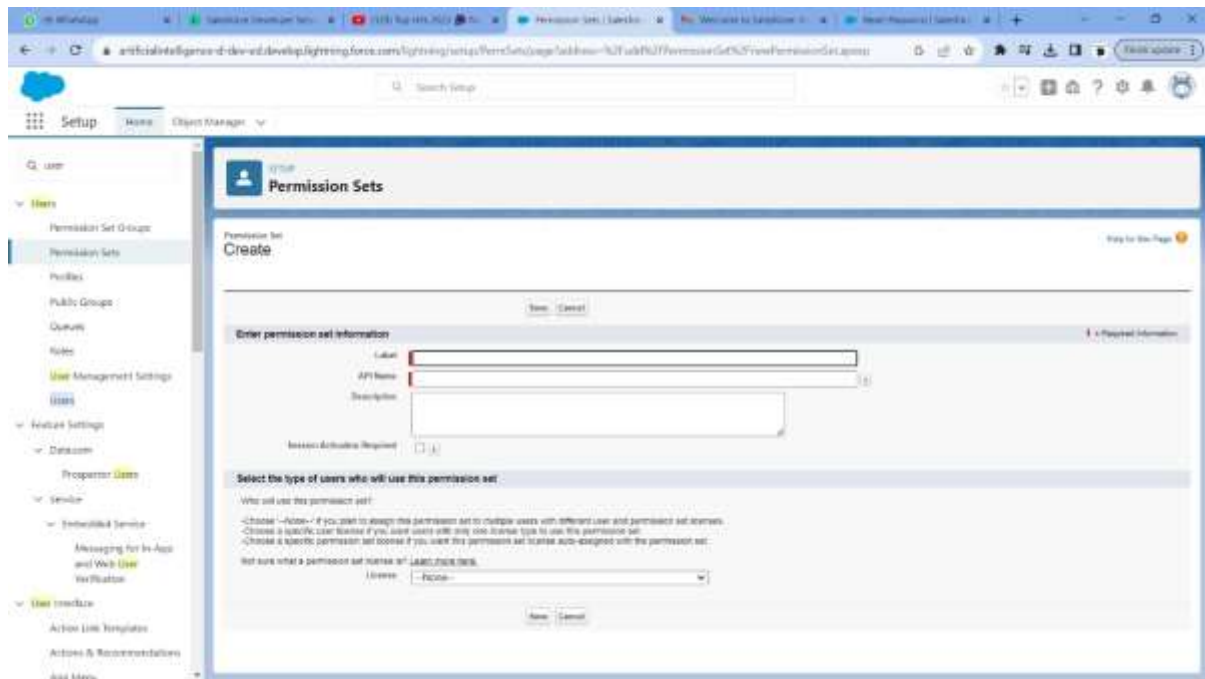
Organization-Wide Defaults:

- Set the organization-wide defaults for the Account object to "Private" to ensure that records are private by default.

Testing:

- Test the setup by logging in as User A and User B separately to verify that they cannot access each other's records.





Setup | Home | Object Manager

user

Items

- Permission Set Groups
- Permission Sets
- Policies
- Public Groups
- Quizzes
- Rules
- User Management Settings
- Users
- Website Settings
- Website
- Proportion
- Service
- Embedded Service
- Messaging for In-App and Web User
- Verification
- User Interface
- Action Link Templates
- Actions & Recommendations

Permission Sets

Permission Set: salesmanager

First Settings | Close | Delete | Edit Properties | Manage Assignments

Permission Set Overview | Object Settings | **Permissions**

Permissions

Tab Settings

Available: ☐ | ☒ All

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Birth Name	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>

Setup | Home | Object Manager

user

Items

- Permission Set Groups
- Permission Sets
- Policies
- Public Groups
- Quizzes
- Rules
- User Management Settings
- Users
- Website Settings
- Website
- Proportion
- Service
- Embedded Service
- Messaging for In-App and Web User
- Verification
- User Interface
- Action Link Templates
- Actions & Recommendations
- Add More...

Permission Sets

Permission Set: salesmanager

First Settings | Close | Delete | Edit Properties | Manage Assignments

Permission Set Overview | Object Settings | **Permissions**

Permissions

Tab Settings

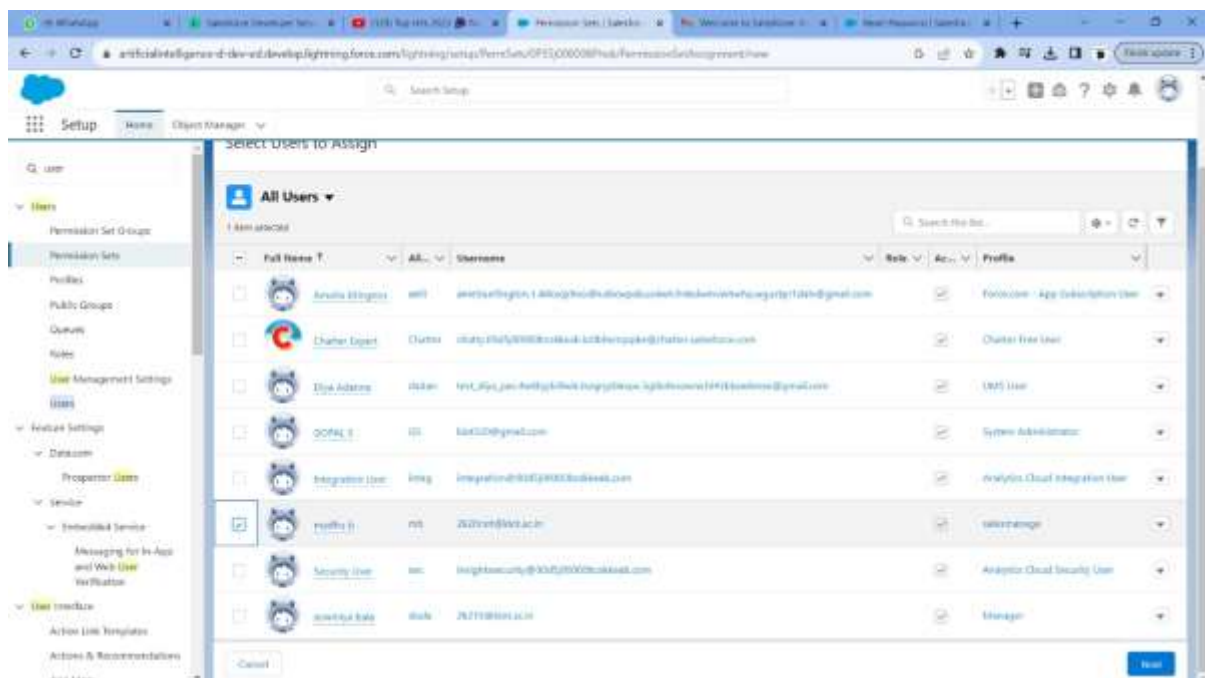
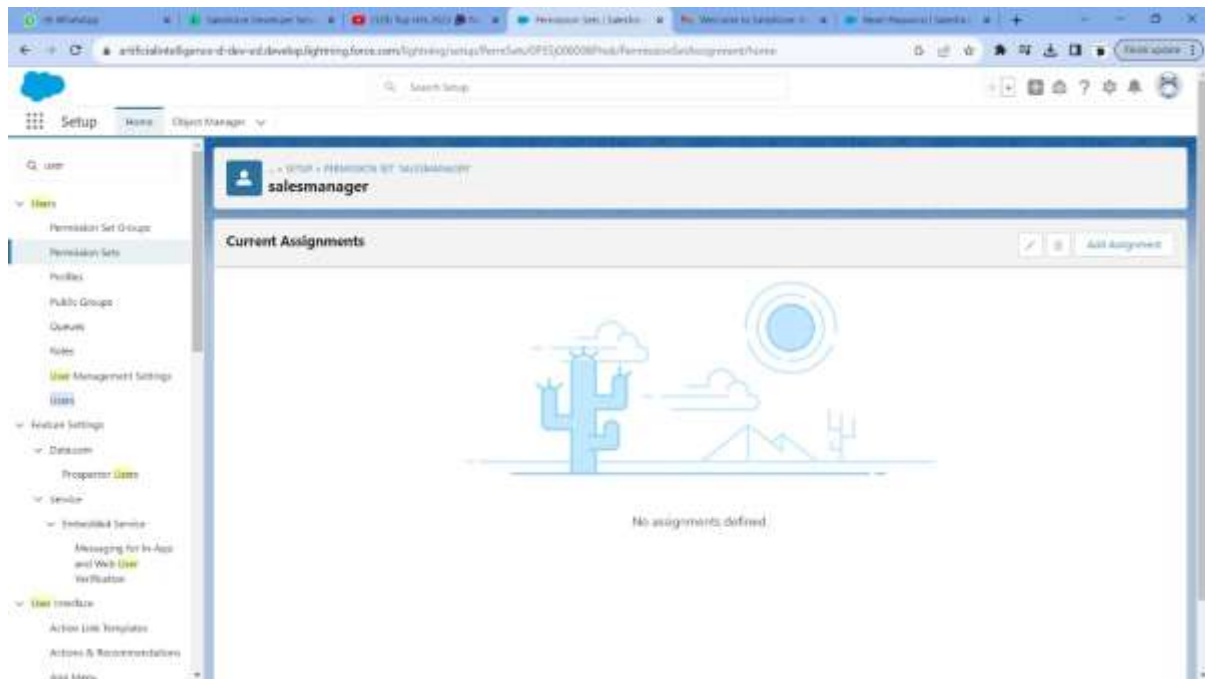
Available: ☐ | ☒ All

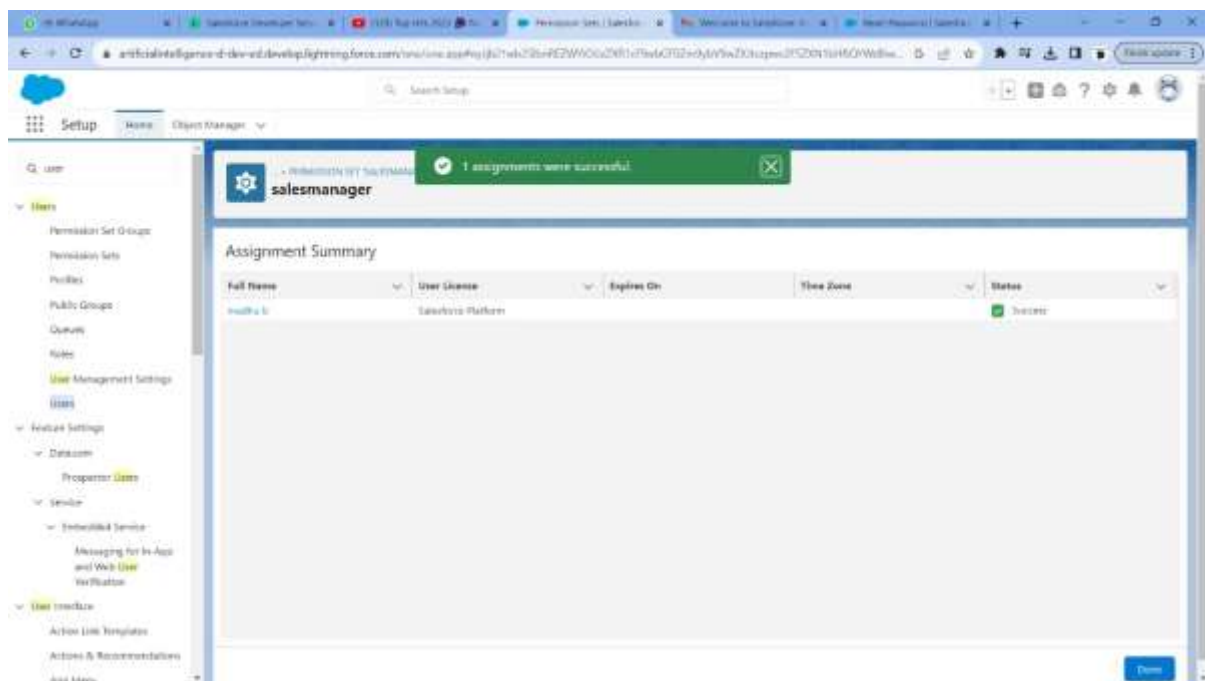
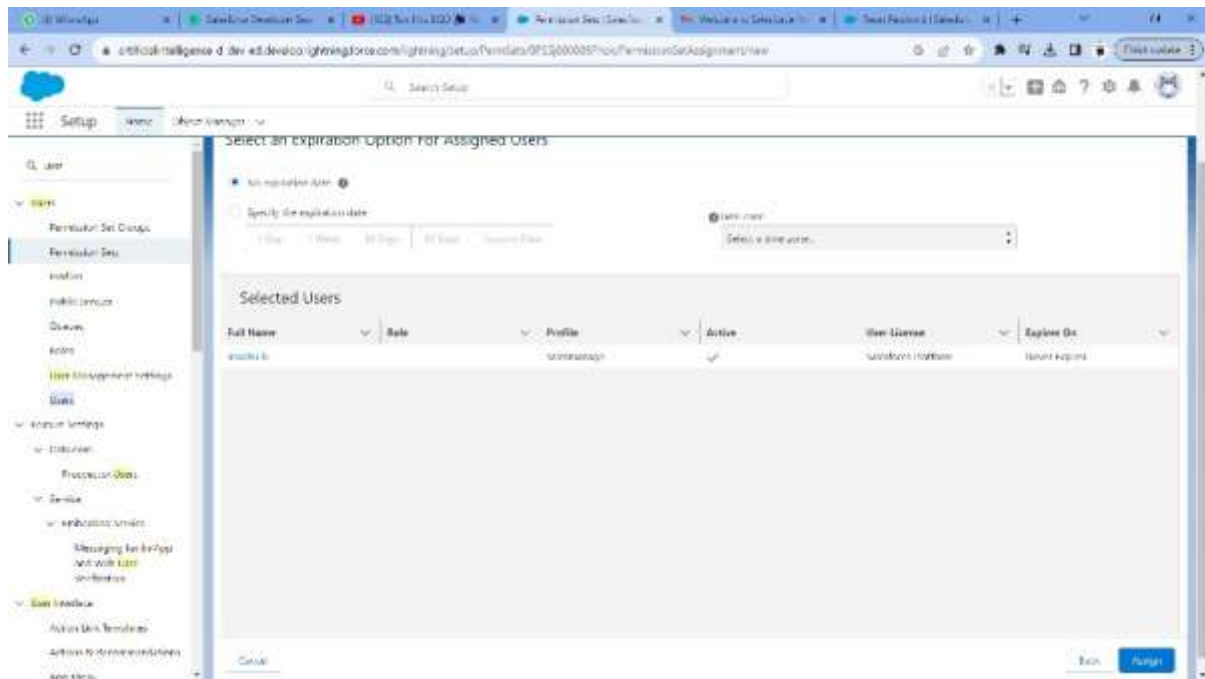
Object Permissions

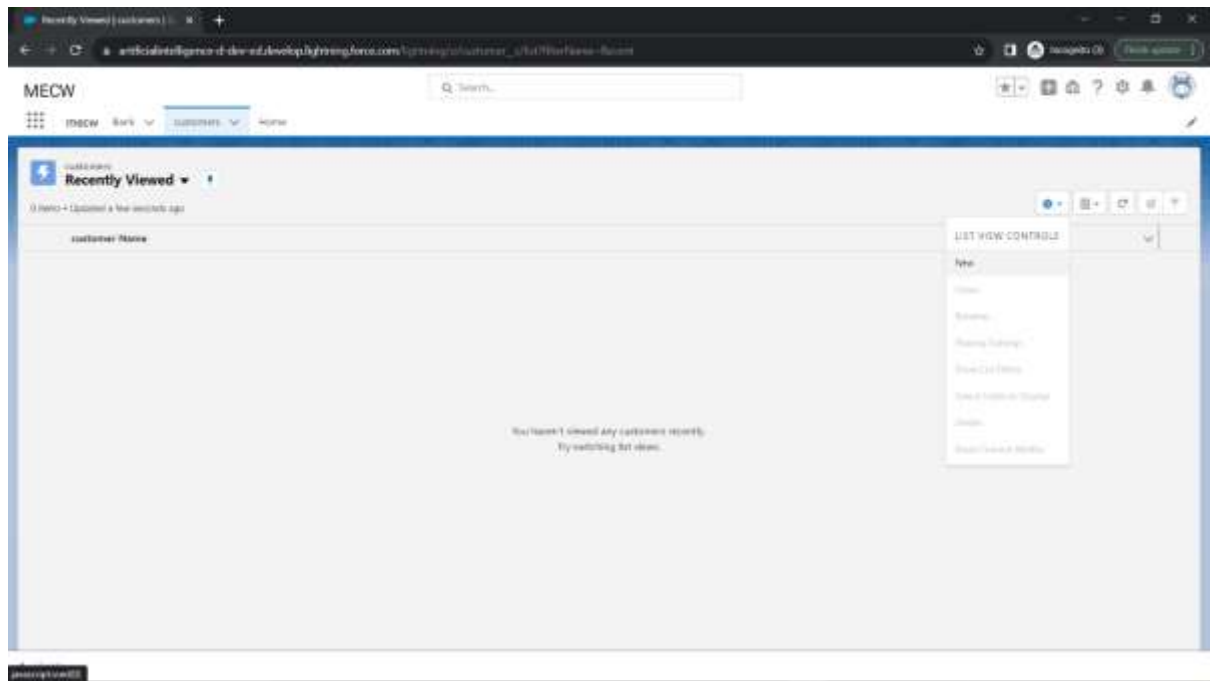
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Read Access	Edit Access
Birth Name	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>





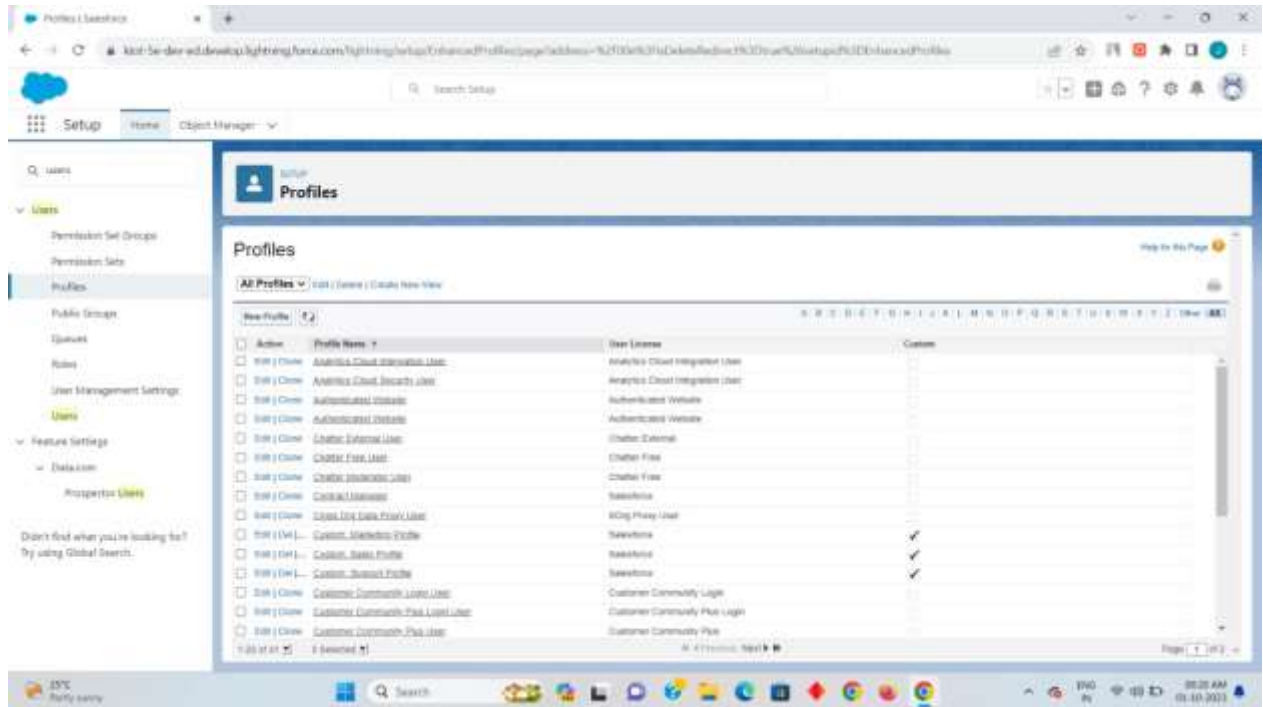


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

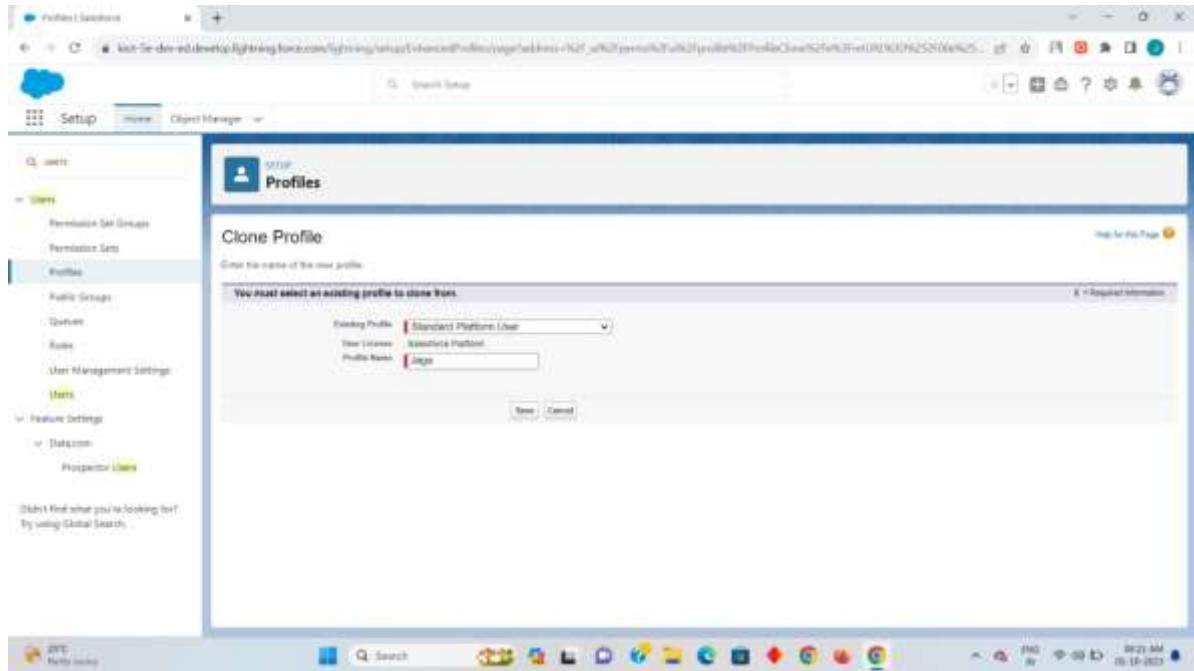
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

Click on the new to create a new profile along with the label and Api



Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.

Step 3:

Now click on the edit and scroll down to custom object settings and enable the read,create,edit and view options. After that click on save.

Profiles | Overview

test-frontend-develop@lightningfmc.com lightningfmc.com/Profiles/page/addresses=9L29XG30000M027902SetupP61017KewestProfiles

Search Setup

SetupHomeObject Manager

Q users

Users

Permission Set Groups

Revision Rate

Profiles

Public Groups

Custom

Notes

User Management Settings

Users

Finance Settings

Global.com

Inspector Users

Didn't find what you're looking for?
Try using Global Search

Profiles

Profile: Jaga

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by adding that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Link Of Group ID | Disabled from Group Profile ID | Disabled Metadata Group Profile ID | Disabled External Data Group Profile ID | Disabled Content Controlled Profile ID | Disabled External Content Profile ID | Disabled External Content Profile ID | Disabled External Content Profile ID | Disabled External Content Profile ID | Disabled External Content Profile ID | Disabled External Content Profile ID

Profile Detail

Edit | Clone | Delete | View Users

Name	Jaga	Custom Profile	<input checked="" type="checkbox"/>
Host Location	Standard Platform		
Description			
Created By	admin@lightningfmc.com	Modified By	admin@lightningfmc.com

Page Layouts

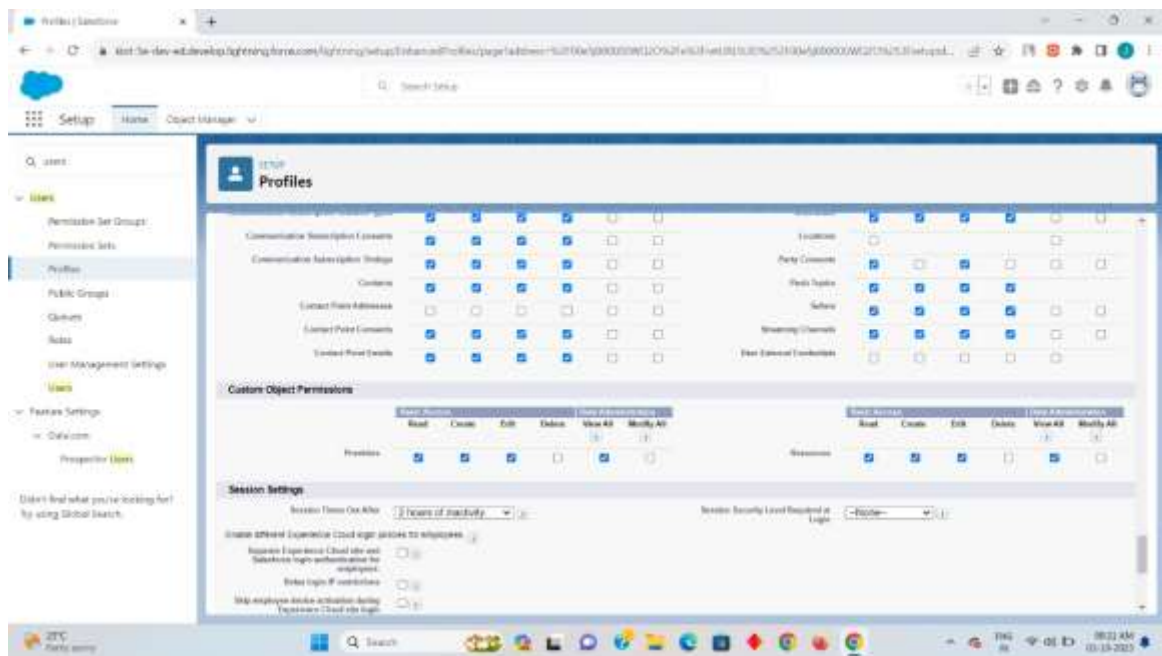
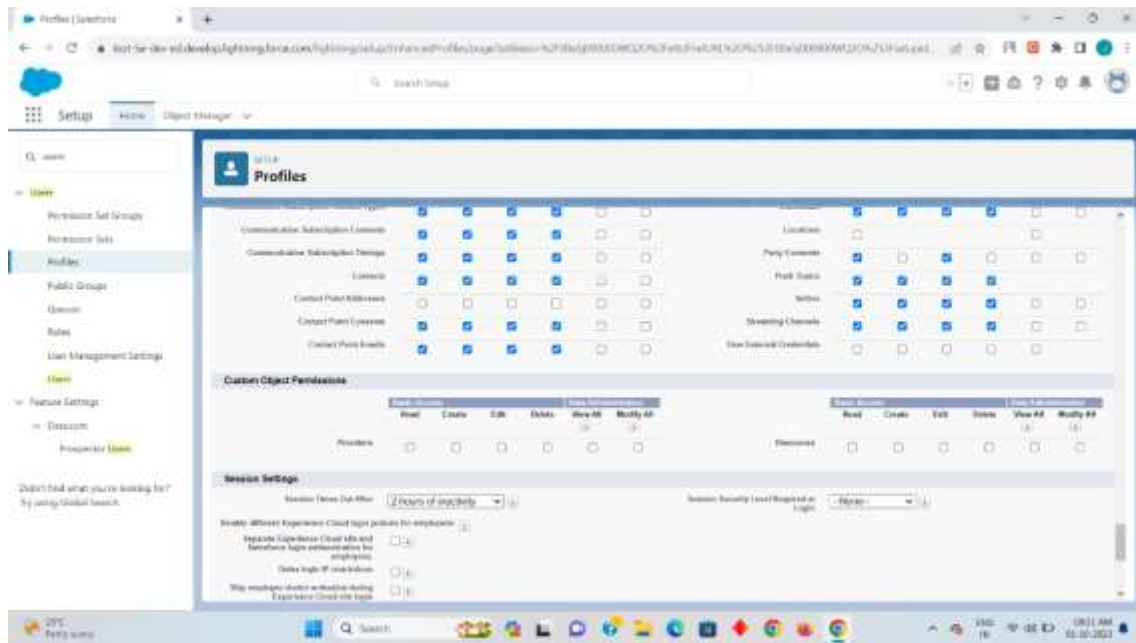
Standard Object Layouts	Global	Global Layout (100,000,000)	Standard Object Layouts	Global Layout (100,000,000)
Host Application	Not Assigned	(100,000,000)	Host Application	Not Assigned
Home Page Layout	Home Page Default (100,000,000)		Home Page Layout	Home Page Default (100,000,000)
Account	Account Layout (100,000,000)		Account	Account Layout (100,000,000)
Alternative Payment Method	Alternative Payment Method Layout (100,000,000)		Alternative Payment Method	Alternative Payment Method Layout (100,000,000)
Agreement Initiation	Agreement Initiation Layout		Agreement Initiation	Agreement Initiation Layout

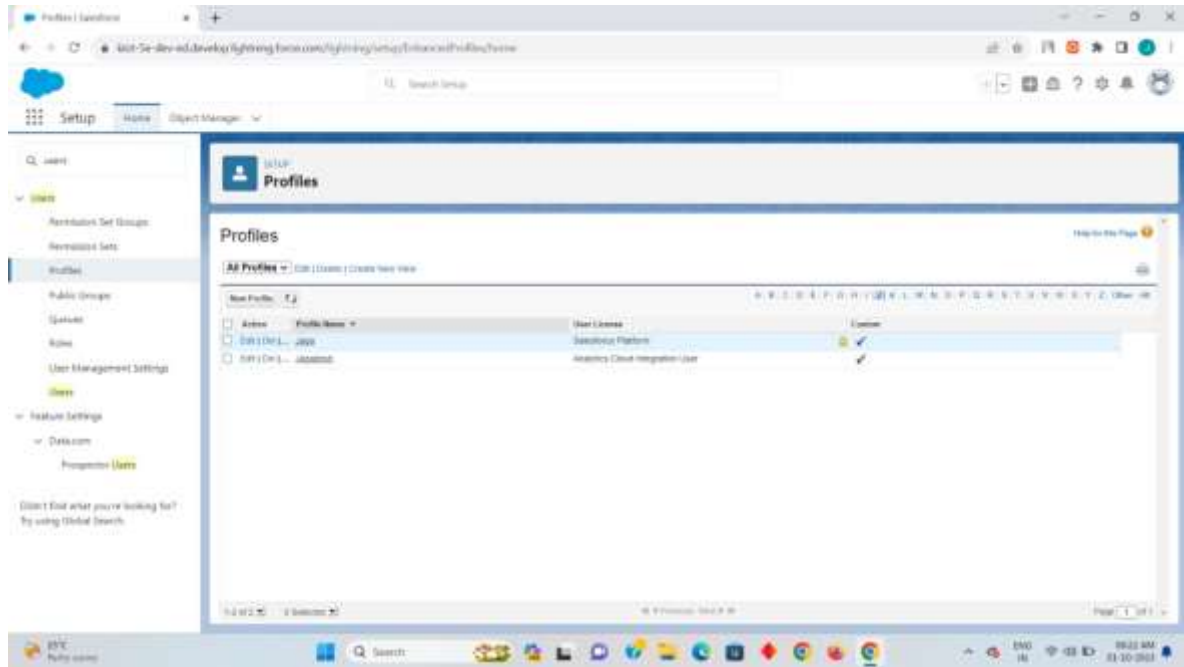
25°C

Ready to work

Search

10:11 AM 10/10/2023

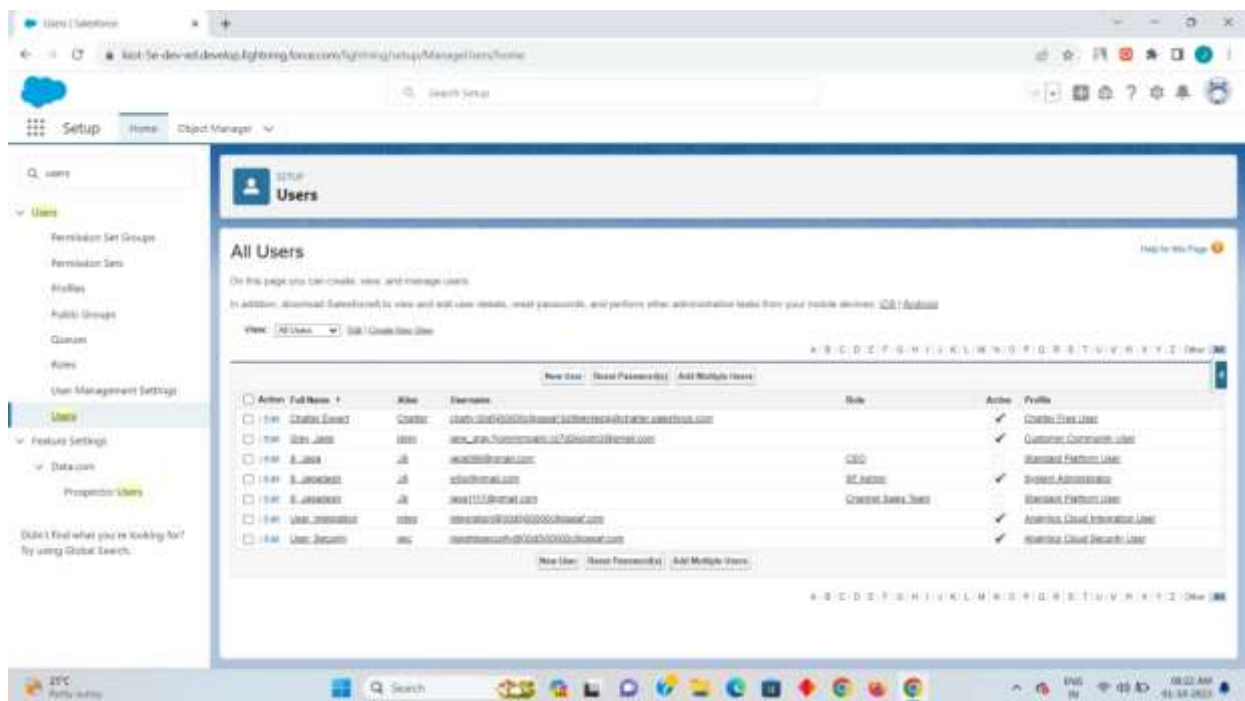


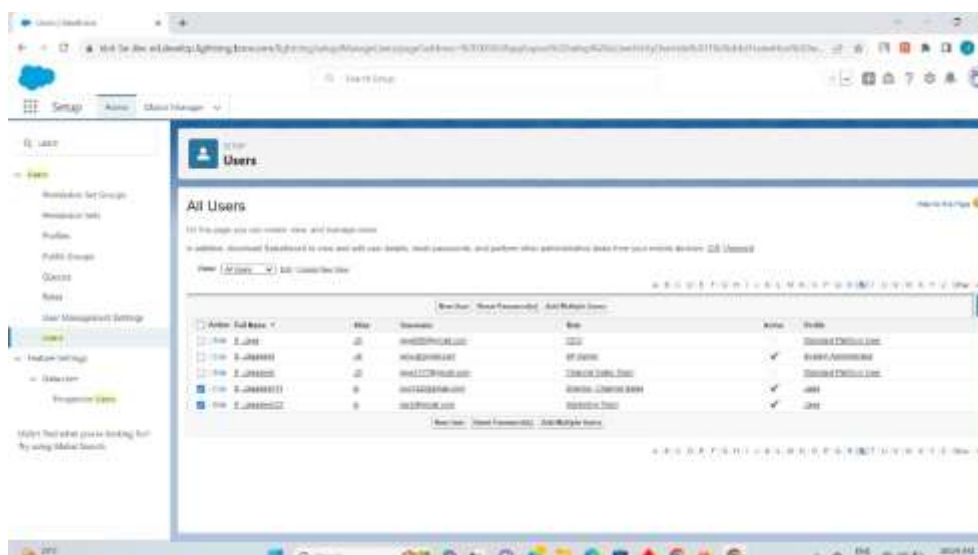


Step 5:

Now create two users by enter into the Setupquick search[user] and then click on new user after

clicking that you need to create two user along with the profile as Jaga which we have created on the step 2.once the one user has been created click on the save&new so that you can create the second user and there the user name can be created with alternate name but with the same user profile and once the two user are create click on save.



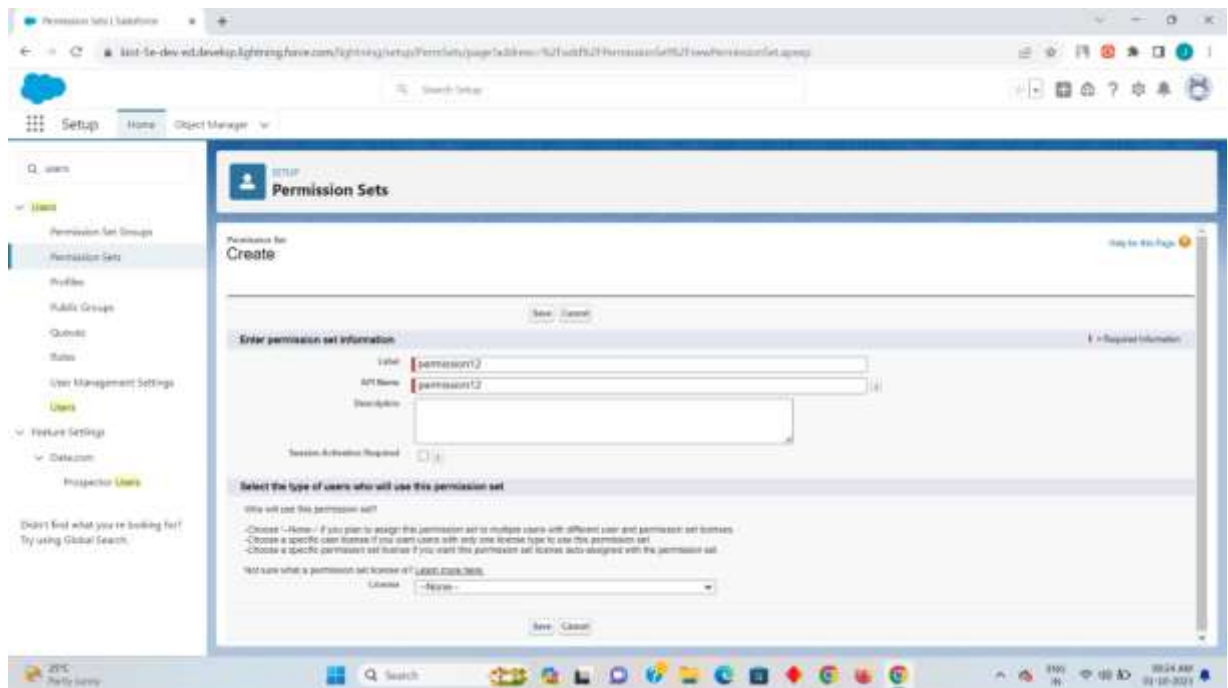


Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

Step 6:

Now the two user as been created with the profile so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can created as

setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.



Permission Sets | Salesforce

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?
Try using Global Search.

Permission Sets

permission12

View Settings Close Details Edit Properties Manage Assignments

Permission Set Overview

Description: Internal

System Activation Required: ☐

Last Modified By: jasper@bcs.co.uk 01/10/2023 8:24 am

API Name: permission12

Registration Profile: [View Profile](#)

Created By: [jasper@bcs.co.uk](#) 01/10/2023 8:24 am

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu.

AVAILABLE COMMON APPS
Settings that specify which standard apps are visible in the app menu.

Client Settings
[Accession Numbers Search and Tools](#) [App History List in the sidebar](#)

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Center".

App Data Access
Permissions to access app records.

Visualforce Page Access
Permissions to access Visualforce pages.

Business Data Source Access

Permission Sets | Salesforce

Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?
Try using Global Search.

Permission Sets

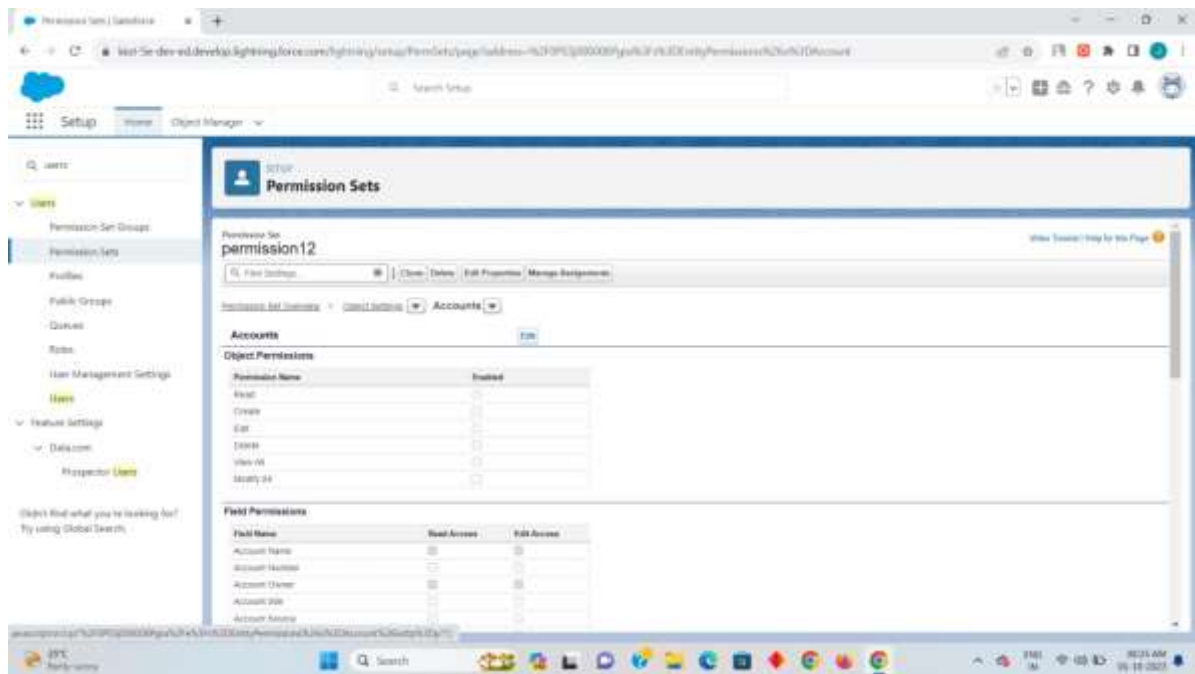
permission12

View Settings Close Details Edit Properties Manage Assignments

Permission Set Overview

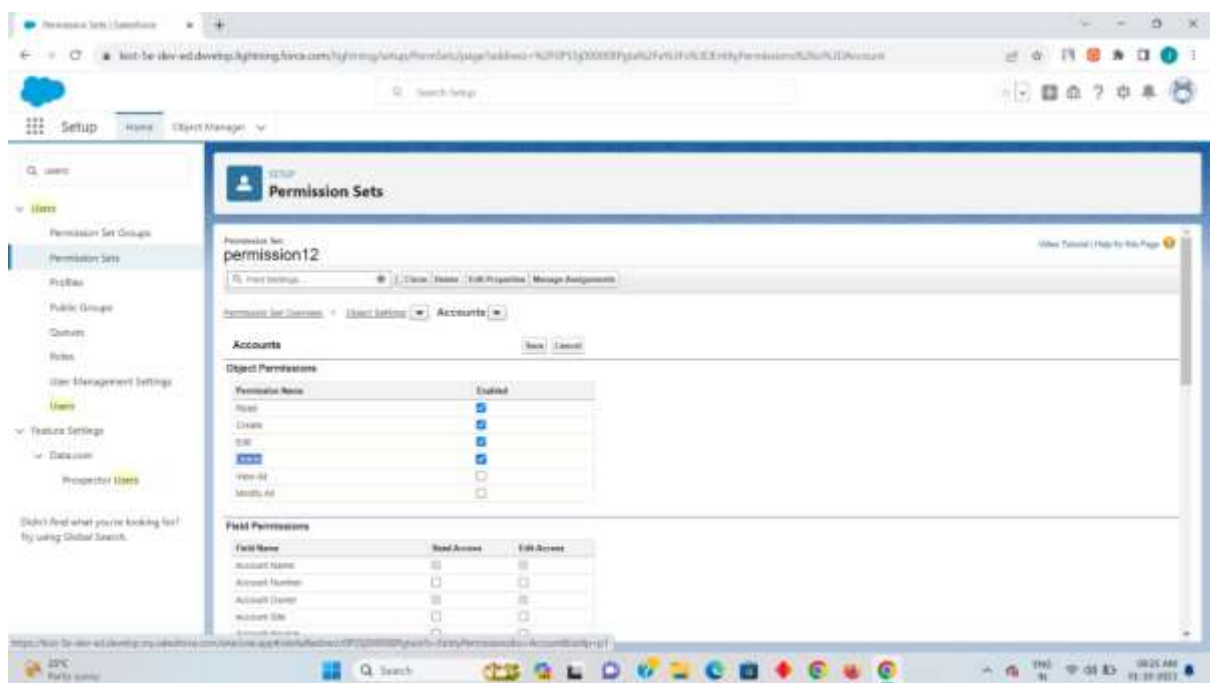
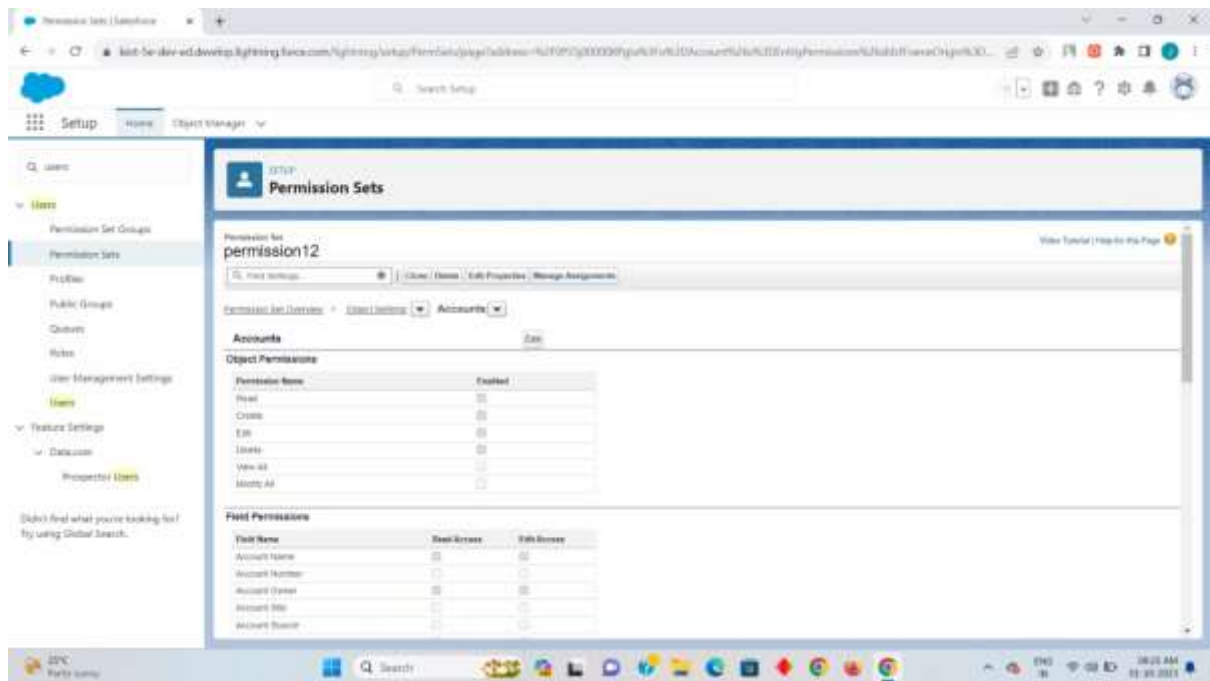
Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Account	No Access	0	---
Account History	No Access	44	---
Account Relationship	No Access	---	---
Account Relationship	No Access	---	---
Alternative Payment Methods	No Access	27	---
API Accessible User Stories	No Access	18	---
App Analytics Query Resources	No Access	---	---
Appointment Queue Assignment	No Access	---	---
Appointment Queue Assignment	No Access	5	---
Appointment Queue Assignment	No Access	17	---
Appointment Queue Assignment	No Access	4	---
Appointment Queue Assignment	No Access	---	---
Appointment Queue Assignment	No Access	---	---
Appointment Queue Assignment	No Access	6	---
Appointment Queue Assignment	No Access	30	---
Appointment Queue Assignment	No Access	18	---



Step 7:

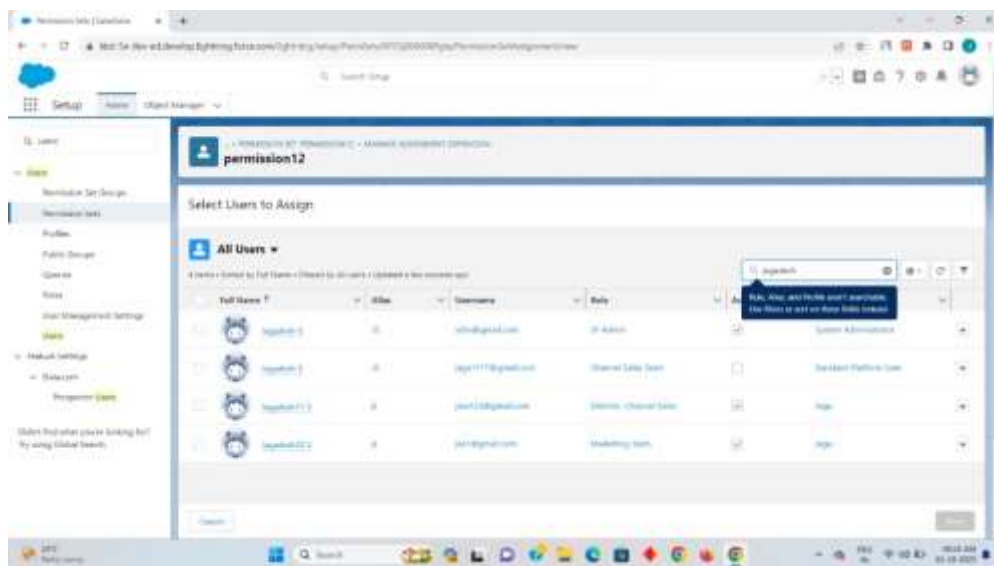
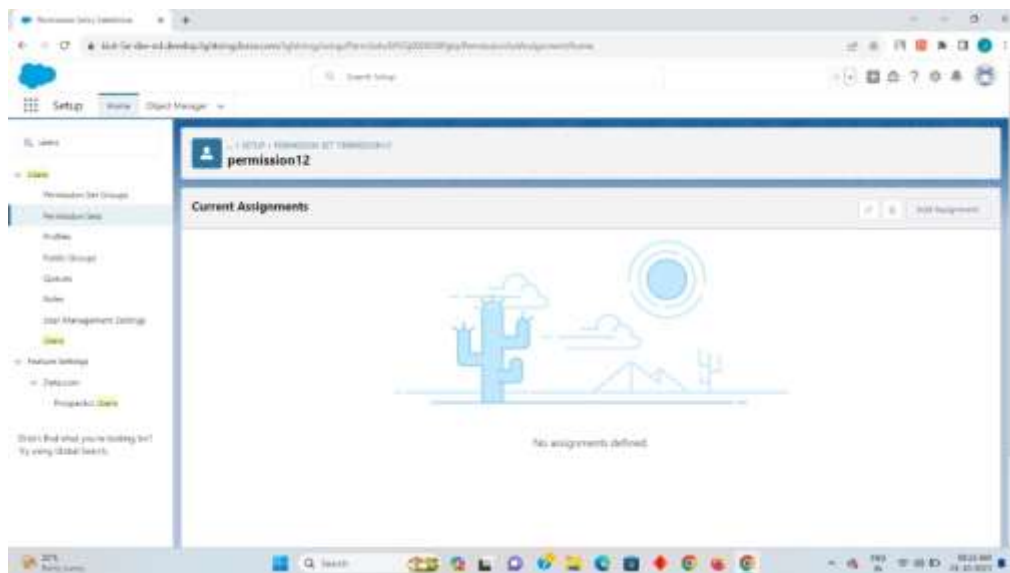
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

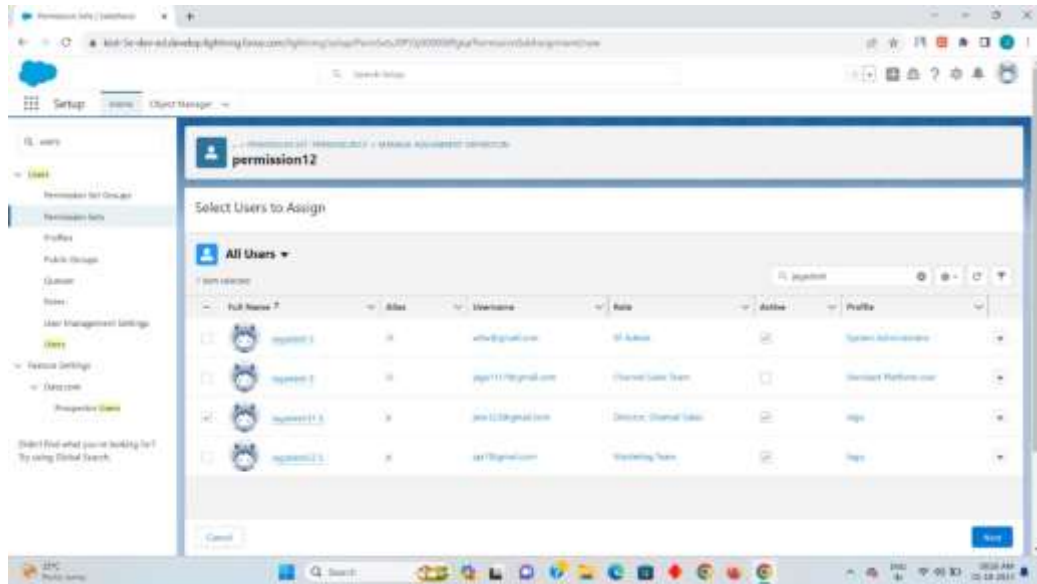


Step 8

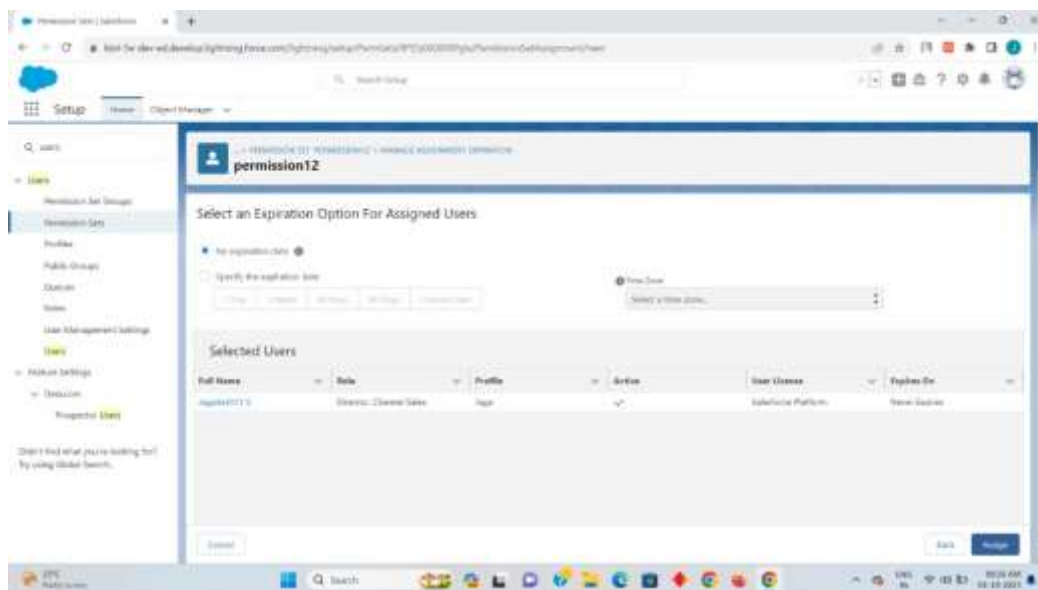
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click

on assign so that the specific selected user can have a special access as delete on it.

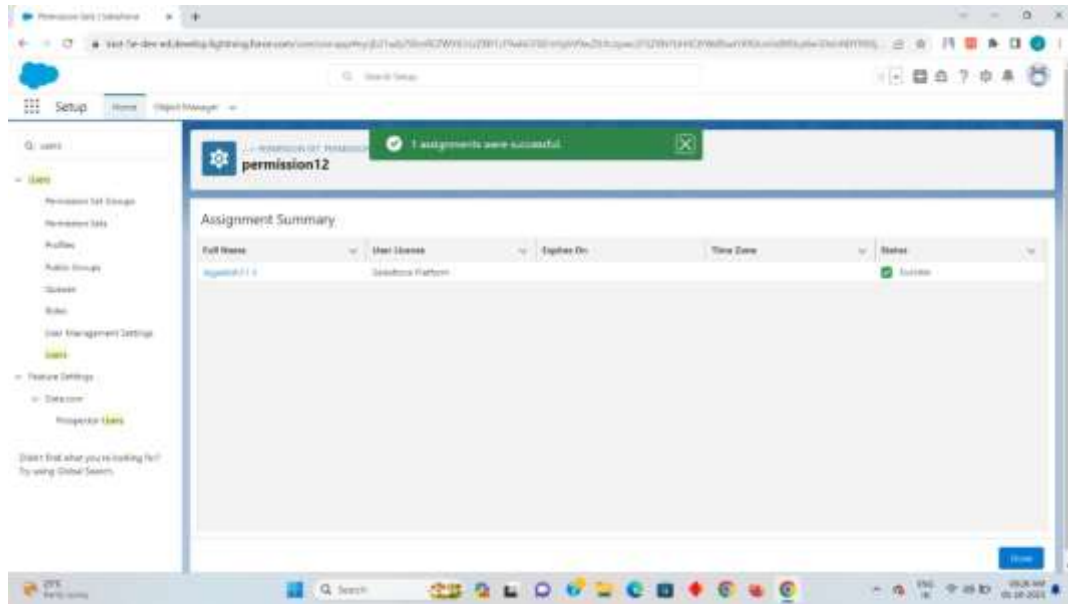




Click on next.



Now click on Assign.



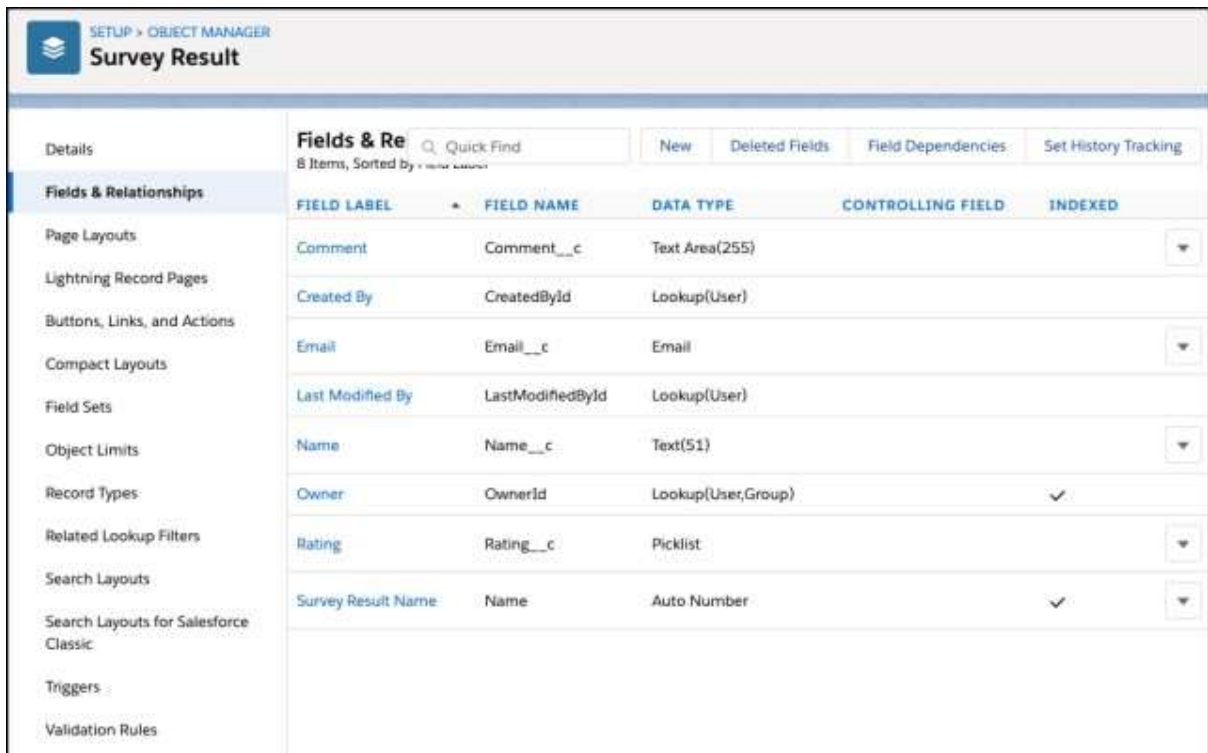
Now the specific access for the Jagadesh11 user has been assigned successfully.

4. Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object The next step is to create a custom object Survey Result and a few custom fields to store survey responses.

1. Click **Setup**
2. In the Object Manager, click **Create | Custom Object**.
3. Now create a custom object **Survey Result** and fields as shown in the screenshot below:
4. Click **Save**.



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

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. Click on the **New Email Template** button.
4. Name the **Lightning Email Template** and ensure to store it in the **Public Email Templates** folder.
5. Create a template like the following screenshot.

The screenshot displays the Lightning Email Template Builder interface. At the top, the title bar reads 'Email Template: Thank You Email - Survey' with buttons for 'Edit in Builder', 'Edit', and 'Clone'. Below this, there are two tabs: 'Details' (selected) and 'Related'. The 'Details' tab is divided into two main sections: 'Information' and 'Message Content'. The 'Information' section contains fields for 'Email Template Name' (Thank You Email - Survey), 'Description', 'Related Entity Type' (Survey Result), 'Folder' (Public Email Templates), and a checkbox for 'Made in Email Template Builder' which is checked. The 'Message Content' section includes a 'Subject' field (Thank You For Completing Our Survey!) and an 'Enhanced Letterhead' field. Below these, the 'HTML Value' field contains a preview of the email content, which includes a greeting 'Hi {{{Survey_Result__c.Name__c}}}', a paragraph of appreciation, another paragraph of gratitude, and a sign-off 'Thanks, Automation Champion'. At the bottom, the 'Additional Information' section shows 'Created By' (Rakesh Gupta, 12/21/2020, 4:23 PM) and 'Last Modified By' (Rakesh Gupta, 12/21/2020, 4:32 PM).

Step 3: Create an Email Alert

1. Click **Setup**
2. In the Quick Find box, type **Email Alerts**

3. **Email Alert** **Email Alerts** click on the **New**
Name **Email Alert**
Unique Name

button.

4. Click the **Recipients** button and click the **Find** button. The **Recipients** window will appear.
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**.

The screenshot shows the 'Edit Email Alert' form for 'Survey - Thank You Email'. The form includes fields for Description, Unique Name, Object, Email Template, Protected Component, Recipient Type, and Recipients. The Recipient Type is set to 'Email Field: Email'. The Recipients section shows a list of available recipients and a list of selected recipients. The form also includes a section for 'Additional Emails' and a 'From Email Address' section.

Edit Email Alert Help for this Page

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 Save Save & New Cancel

Edit Email Alert ! = Required Information

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component: ☐

Recipient Type: Search: User for: Find

Recipients

Available Recipients

User: Integration User
User: Rakesh Gupta
User: Security User

Selected Recipients

Email Field: Email

Add ➔
Remove ⬅

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

Additional Emails

From Email Address: Current User's email address !

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

Save Save & New Cancel

populate.

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**.
4. Select the **Screen Flow** option and click on **Next** and configure the flow as follows:
 1. How do you want to start building:
Freeform
5. We will use the **Screen** element to capture **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** (a **Save Response**) field; the **API Name** will autopopulate.
3. For **How Many Records to Create** select **One**.

4. For How to Set the Record Fields select Use separate resources and literal values.
5. Select the Survey_Result__c object from the dropdown list.
6. Set Field Values for the Survey Result
 1. Row 1:
 1. Field: Comment__c
 2. Value: {!Comment}. Click Add Row
 3. Row 2:
 1. Field: Email__c
 2. Value: {!Email.value}. Click Add Row
 5. Row 3:
 1. Field: Name__c
 2. Value: {!Name.firstName} {!Name.lastName}. Click Add Row
7. Row 3:
 1. Field: Rating__c
 2. Value: {!Rating}. Click Done

Step 4.3: Salesforce Flow — Call an Action — Email Alert to Send Out Thank You Email The next step is to call the Survey Thank You Email email alert from flow so that when flow fires it triggers the thank you email to survey participants.

1. Under **Toolbox** select **Element**
2. Drag-and-drop **Action** element onto the Flow designer.

4. Clicks **Action** Survey — Survey You Thank
Email Email alert. the

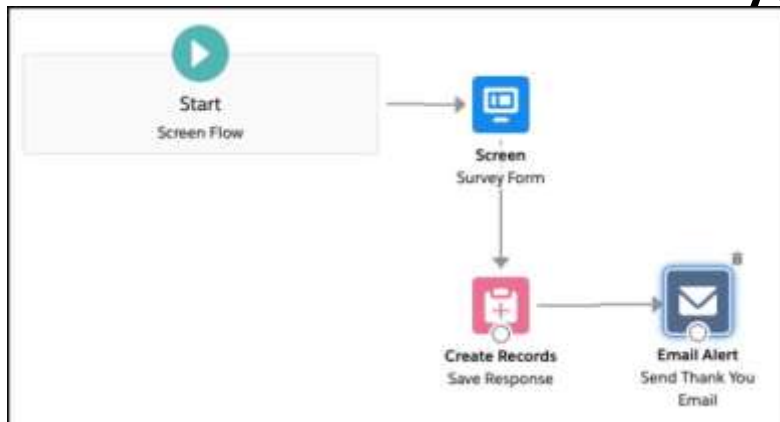
5. Click **Done**. **Survey Thank You**

The screenshot shows a form titled "Edit 'Survey - Thank You Email' email alert". It includes a header with instructions: "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." The form has two main sections: "Label" and "API Name", both with a text input field containing "Send Thank You Email". Below these is a "Description" field. The "Set Input Values" section contains a variable input field labeled "Record ID" with the value "{!Save_Response}". At the bottom right are "Cancel" and "Done" buttons.

In the end, Sergio's **Flow** will look like the
Action box, type Survey —Thank You
Email.

following screenshot:

API Name



Save

2. Enter **Flow Label** the API Name will₁.

Click Save.

auto-populate.

3. Click Show Advanced
4. How to Run the Flow Use for System Context—Depends on How Flow is

Launched

5. Type: Screen Flow
6. API Version for Running the Flow: 51
7. Interview Label: Survey
{!\$Flow.CurrentDateTime}
8. Click Save.

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

12/21/2020, 4:54 PM by Rakesh Gupta

Status:

Active

Type:

Screen Flow

Version Number:

2

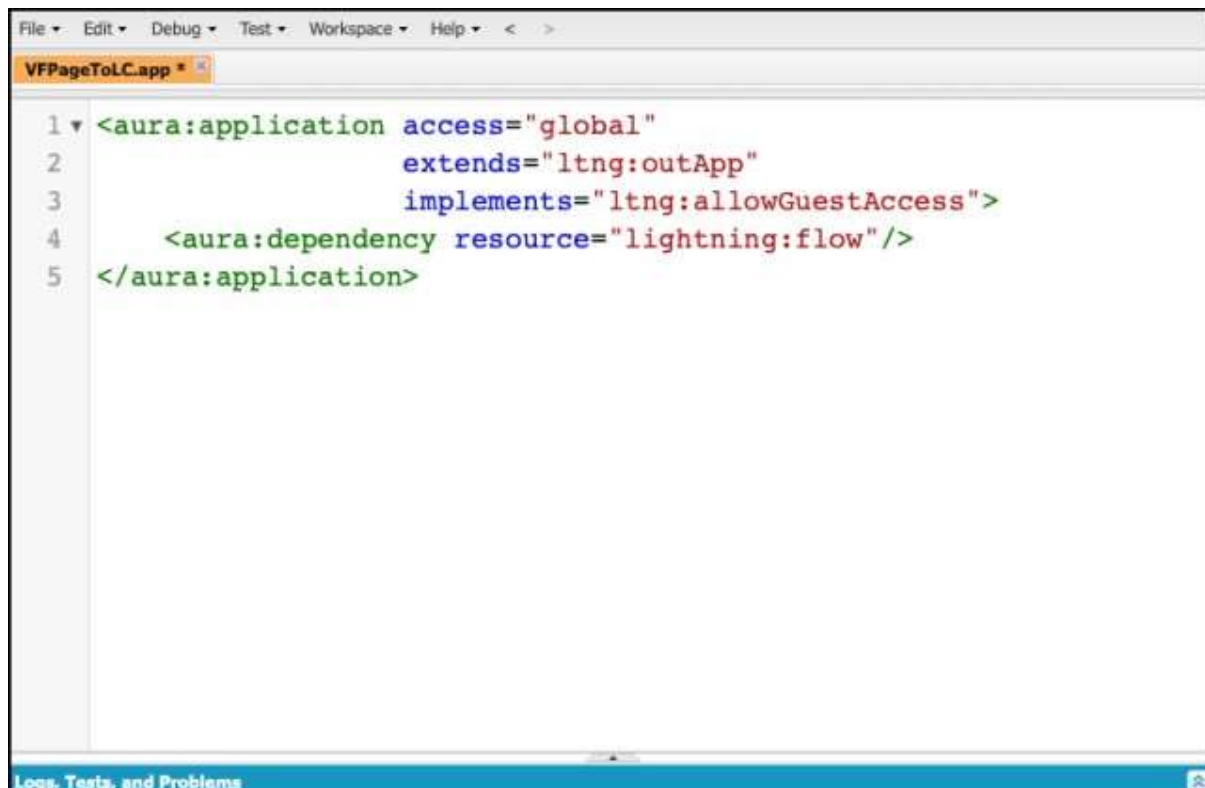
Cancel

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) in the 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.



The screenshot shows the Salesforce IDE interface. The top menu bar includes File, Edit, Debug, Test, Workspace, and Help. The active file is 'VFPageToLC.app'. The code editor displays the following XML code:

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

The bottom status bar indicates 'Logs, Tests, and Problems'.

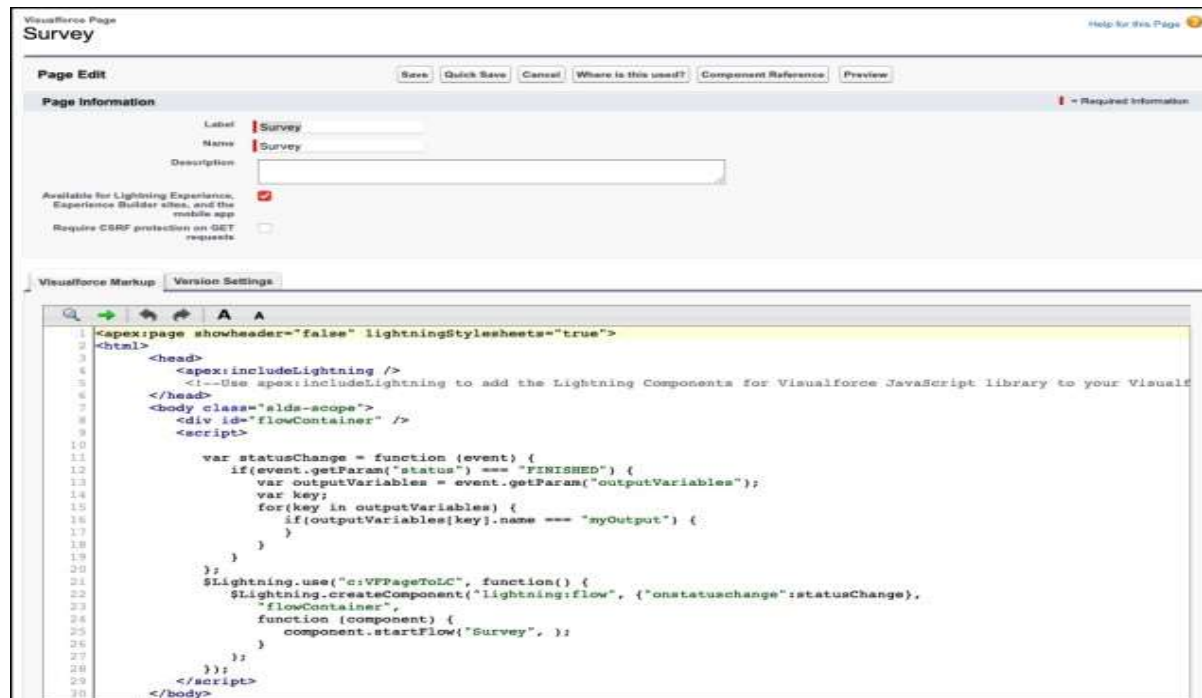
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

Add the Lightning Components for Visualforce JavaScript library to your Visualforce page using the `<apex:includeLightning/>` component. In the Visualforce page, reference the dependency app. Then write a JavaScript function that creates the component on the page using `$Lightning.createComponent()`

1. Click **Setup**.
2. In the Quick Find box, type **Visualforce Pages**.
3. Clicks on the **New** button.
4. Copy code from **GitHub** and paste it into your visualforce page

Click **Save**.



5.

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

Rakesh Gupta

Default Record Owner

Rakesh Gupta

Default Web Address

http://kathar-developer-edition.gus.force.com/survey

Active

☒

Active Site Home Page

Survey

Inactive Site Home Page

InMaintenance

Site Template

SiteTemplate

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

URL Rewriter Class

Enable Feeds

☐

Clickjack Protection Level

Allow framing by the same origin only (Recommended)

Require Secure Connections (HTTPS)

☒

Lightning Features for Guest Users

☒

Upgrade all requests to HTTPS

☒

Enable Content Sniffing Protection

☒

Enable Browser Cross Site Scripting Protection

☒

Referrer URL Protection

☒

Guest Access to the Payments API

☐

Under site, **Public Access Settings** make sure that guest users have **Create** access on **Survey Result** object and **Edit** on the **Survey Result** object's **fields**.

Now onward, if someone opens the site url and fills the form:

Survey

Name

First Name

Alok

Last Name

Sinhal

*Email

*Rating

5

*Comment

Awesome Blog

Next

After successful submission, he/she will receive an email.

Thank You For Completing Our Survey!

Survey Site Guest User

to me

Hi Alok Sinhal,

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.

Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.

Thanks,
Automation Champion

Reply

Forward