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Salesforce
Developer(Course)
Assignment no 1

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Year & Dep : 4th year & CSE
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** 15 Search

New Custom Object

New Custom Object Help for this Page

Permissions Permissions for this object are defined for all profiles by default. You can create object permissions in combination with existing reports or new "Salesperson" and "Salesperson Manager" profiles.

Custom Object Definition Edit Save Save & Close Cancel

Custom Object Information 1 Required Information

The object will be visible on your org's page, page layouts, and reports.

Label: **Example:** Account

Record Name: **Example:** Account

Record Name must be used: ☐

The Object Name is used when referencing the object via the API.

Object Name: **Example:** Account

Description:

Custom Business Rule Setting: ☒ Open the required business rule setting & training window ☐ Open a custom page & the object page

Custom Name: Go to Page

Enter Record Name Label and Format

The Record Name appears in page layouts, reports, and object settings. For example, the Record Name for Account is "Account Name" and for Case is "Case Name". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: **Example:** Account Name

Name Type:

Optional Features

☐ Allow Reports

☐ Allow Actions

☐ Allow Field History

☐ Allow in CRM/CRM

☐ Enable Learning Go to Page

Object Classification

When this setting is enabled, the object is considered as an enterprise application object. When this setting is disabled, the object is considered as a light application object. Go to Page

☒ Allow Learning

☒ Allow CRM/CRM

☒ Allow Learning CRM/CRM

Deployment Status Show in Page

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, you can search records of the object type when they search in your org.

☐ Allow Search

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

☐ Add Rules and Attachments when Add to & Add page layout

☐ Launch new custom page layout after saving the custom object

Save Save & Close Cancel

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

New Custom Object

Permissions for the object are defined for all profiles by default. You can enable object permissions in combination with defining reports on New "Sales Report" or create new reports on New "Sales Report".

Custom Object Definition Edit [New](#) [Save & Run](#) [Cancel](#)

Custom Object Information [+ Required Information](#)

The object and table names are used in many places, such as reports and search.

Label: **Example:** Account

Plural Label: **Example:** Accounts

Name with initial value: ☐

The Object Name is used when referencing the object via the API.

Object Name: **Example:** ACCOUNT

Description:

Customizable by API: ☒ Open the required Developer Console & Training window
☐ Open a custom page with a table to page

Record Name: **Example:** Account Name

Name Type:

Optional Features

☐ Allow Reports
☐ Allow Archiving
☐ Track Field History
☐ Index for CRM/Outlook
☐ Enable Streaming

Object Classification

When these settings are enabled, the object is considered as an enterprise application object. When these settings are disabled, the object is considered as a light application object. Learn more

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

Deployment Status [View in Dev](#)

☐ In Development
☒ Deployed

Search Status

When this setting is enabled, you can set up reports of the object type when they search. Learn more

☐ Allow Search

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

☐ Add Rules and Relationships when I click to Add page layout
☐ Launch new custom tab when I click to save the custom object

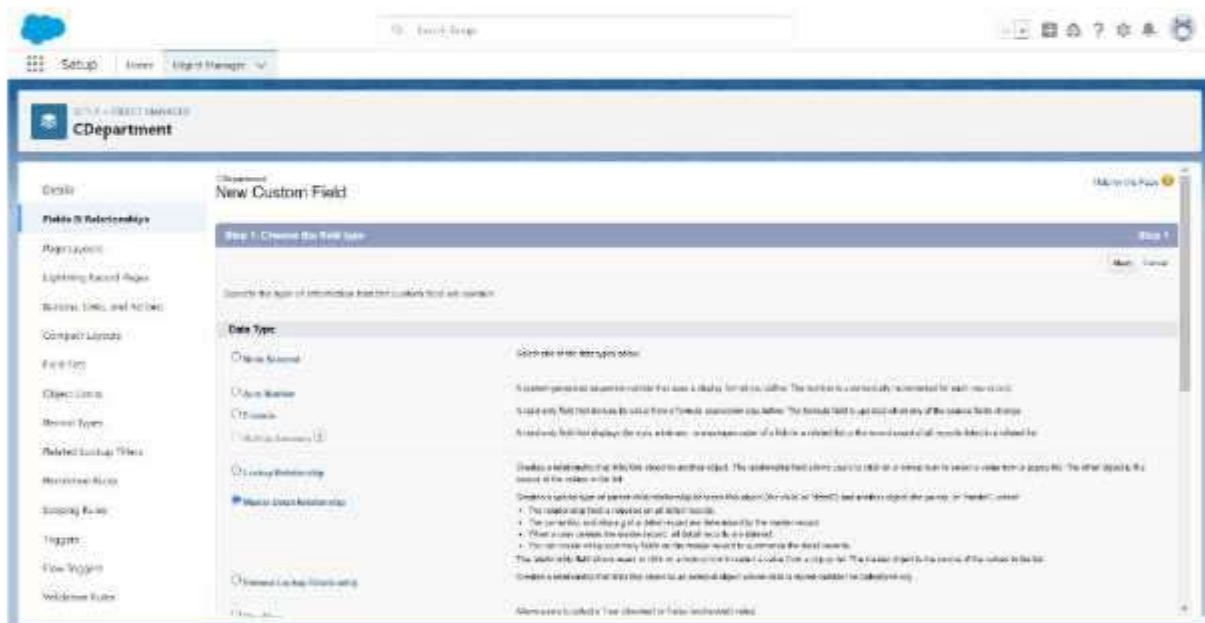
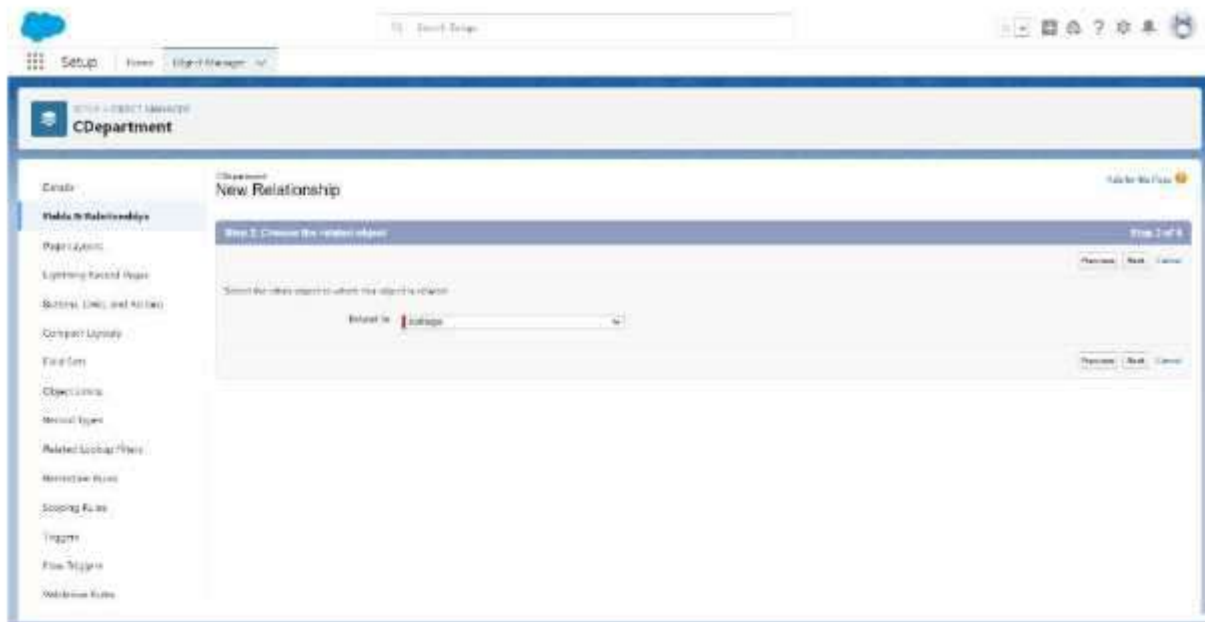
[Edit](#) [Save & Run](#) [Cancel](#)

Step 2: Create a Master-Detail Relationship

To create a Master-Detail relationship between these two custom objects, follow these steps:

1. Go to Setup > Object Manager.
2. Click on "College__c" to open its settings.

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 in "Department__C":

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](#)

STANDARD OBJECT MANAGER

CDepartment

[Fields & Relationships](#)
[Fields & Relationships](#)
[Views](#)
[Current Fields](#)
[Field Dependencies](#)
[Declarative Sharing](#)

4 Items. Sort by: Fields

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	__pageLayout	Master-Details (lookup)		✓
Lightning Record Page	__recordPage	Lookup (lookup)		
Buttons, Links, and Actions	__button	Text (text)		✓
Compact Layouts	__compactLayout	Lookup (lookup)		

- Fields & Relationships
- Views
- Current Fields
- Field Dependencies
- Declarative Sharing

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

STANDARD OBJECT MANAGER

Custom Tabs

[Custom Tabs](#)

4 Items. Sort by: Custom Tabs

Custom Tab Name	Tab Style	Description
Custom Object Tab	Standard	
Web Tab	Web	
Visualforce Tab	Visualforce	
Lightning component tab	Lightning	
Lightning Page Tab	Lightning	

- Custom Tabs

Setup
Tools
Object Manager

college

Details
New Custom Field
Add to My Pages

Step 3: Define the summary calculation
Step 1 of 3
Previous Next Cancel

Select Object to Summarize

Main Object: college
Related Object: **Course**

Select Roll-Up Type

☒ Average
☐ Sum
☐ Min
☐ Max

Filter Criteria

☒ All records should be included in the calculation.
☐ Only records meeting certain criteria should be included in the calculation.

Previous Next Cancel

Setup
Tools
Object Manager

college

Details
New Custom Field
Add to My Pages

Step 3: Enter the details
Step 2 of 3
Previous Next Cancel

Field Label:

Field Name:

Field Type:

☒ Add the field to existing custom report types that contain the field.

Previous Next Cancel

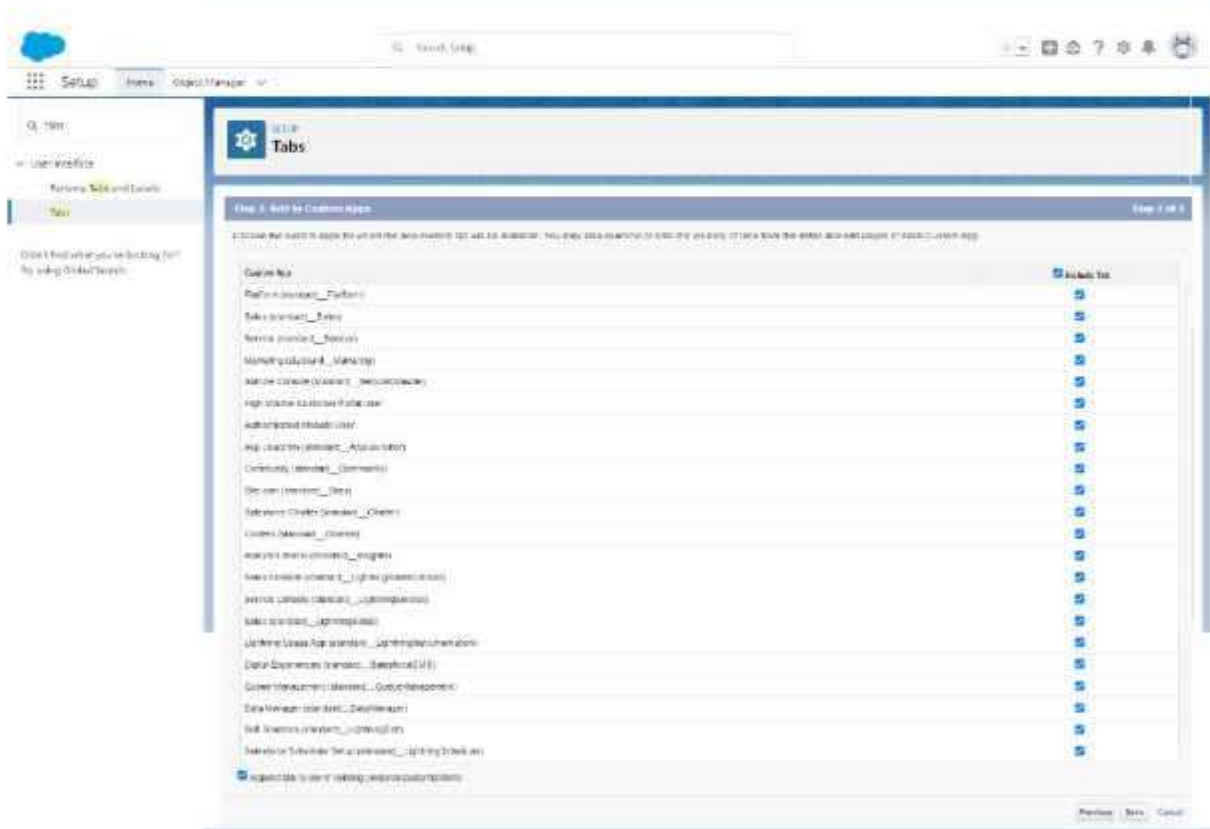
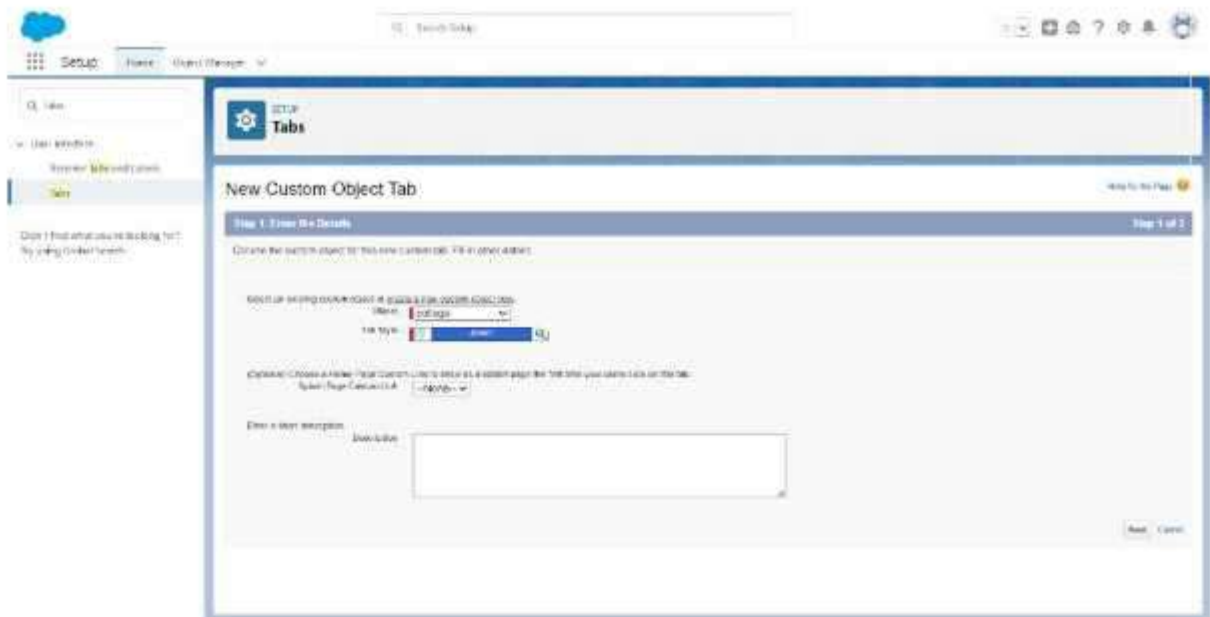
Developer Name, Description).

- 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.**

Stages 2 and 3.

Apply a different size velocity to each profile.

[illegible]





Setup

Home | Object Manager

Search Setup



Q. tabs

Object Manager

Workspace: Tabs and Pages

Tabs

Click a field or value to drill down to its definition or to its usage in your org.



Setup

Custom Tabs

View on 66 Pages

You can create new custom tabs to organize Salesforce data or to add new applications to your org.

Custom Object tabs are the default tabs provided with Salesforce. With tabs, you can view and control which applications and content appear in the Salesforce interface. You can also create tabs to add new applications to your org. Lightning Component tabs allow you to add Lightning components to the navigation bar in Lightning Experience and the header app Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the sidebar app.

Custom Object Tabs

View | Setup | Tabs

Object	Label	Tab Type	Description
Account	Account	Standard	
Case	Case	Standard	
Contract	Contract	Standard	
Lead	Lead	Standard	
Product	Product	Standard	
Quote	Quote	Standard	

Web Tabs

View | Setup | Tabs

No Web Tabs have been defined.

Visualforce Tabs

View | Setup | Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

View | Setup | Tabs

No Lightning Component Tabs have been defined.

Lightning Page Tabs

View | Setup | Tabs

No Lightning Page Tabs have been defined.

Conclusion:

Now, whenever you create or update a record in the "Department__c" related to a "College__c," the "TotalCount__c" field on 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.

MECW

My college colleges CDeatments student Content

Search

Home Contact 229 New Opportunity

College
meow

Related
Details

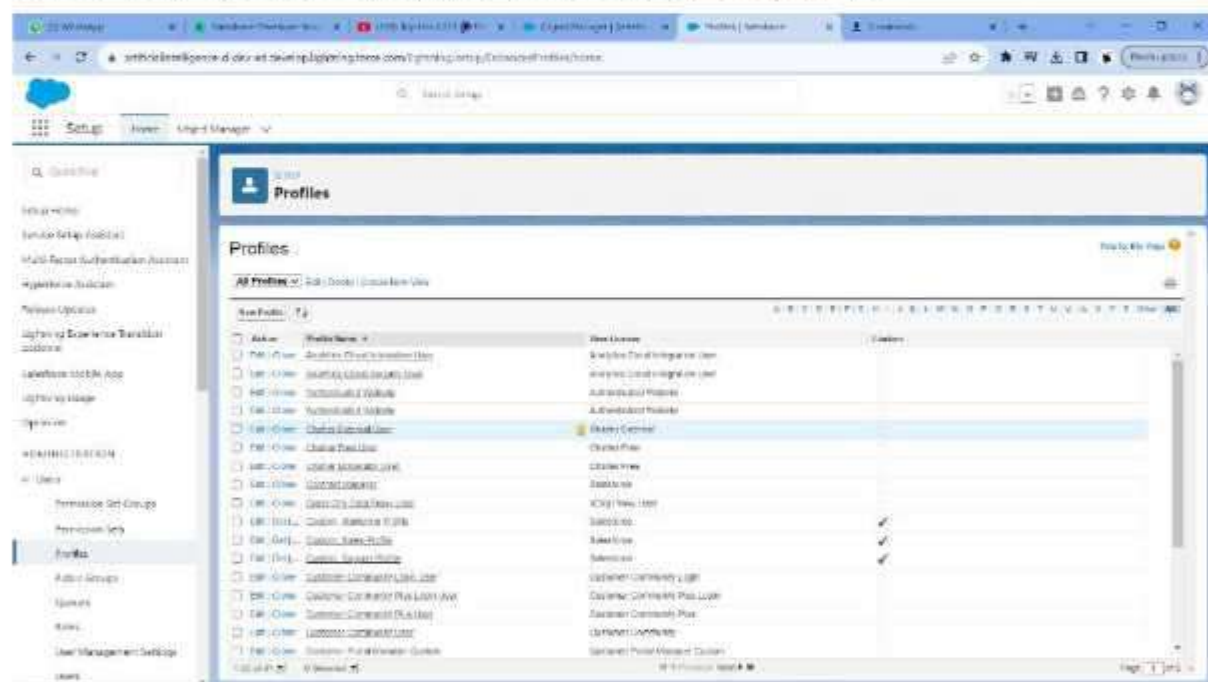
College Name	meow	Name	meow
Student ID	21		
Phone	952715403		
Email	meow@gmail.com		
Location	ME, SC		
Created By	meow 2/10/2023 11:10 am	Last Modified By	meow 2/10/2023 11:10 am

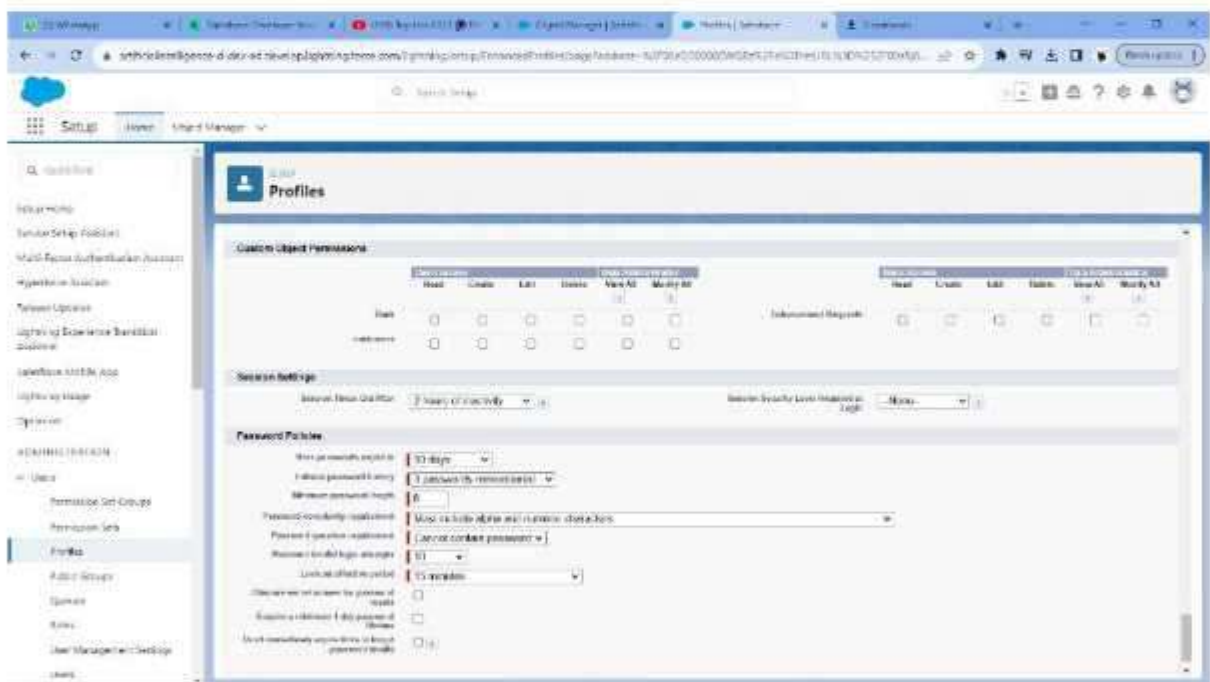
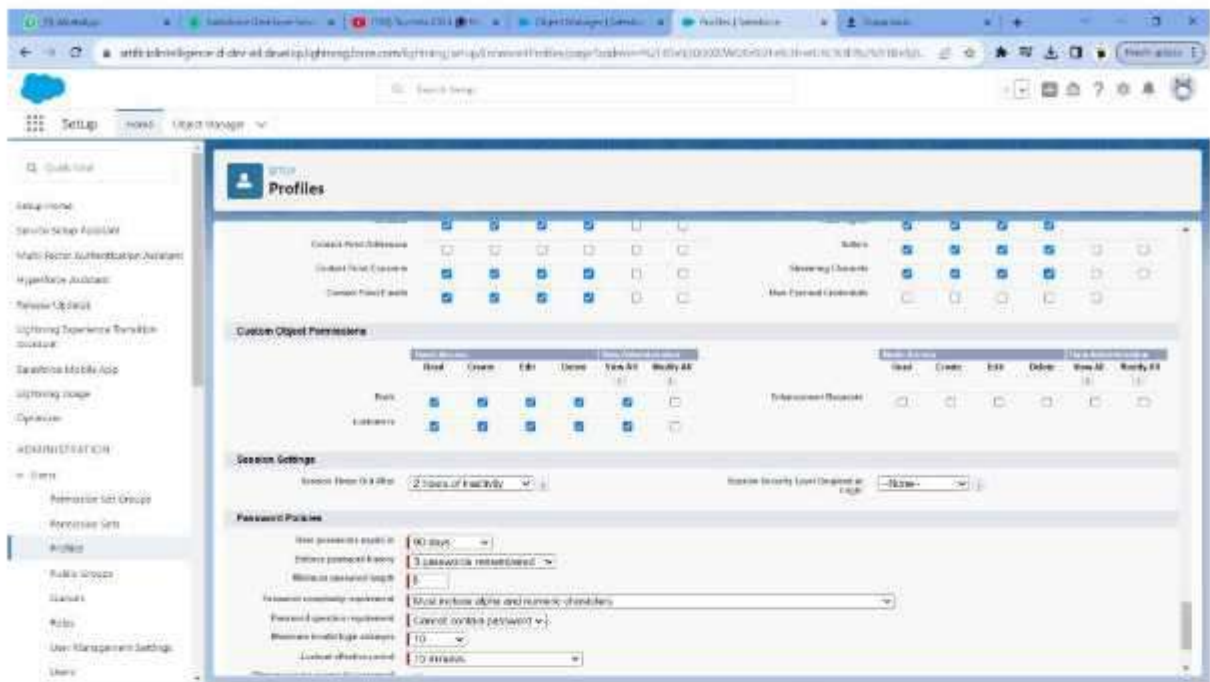
Meow

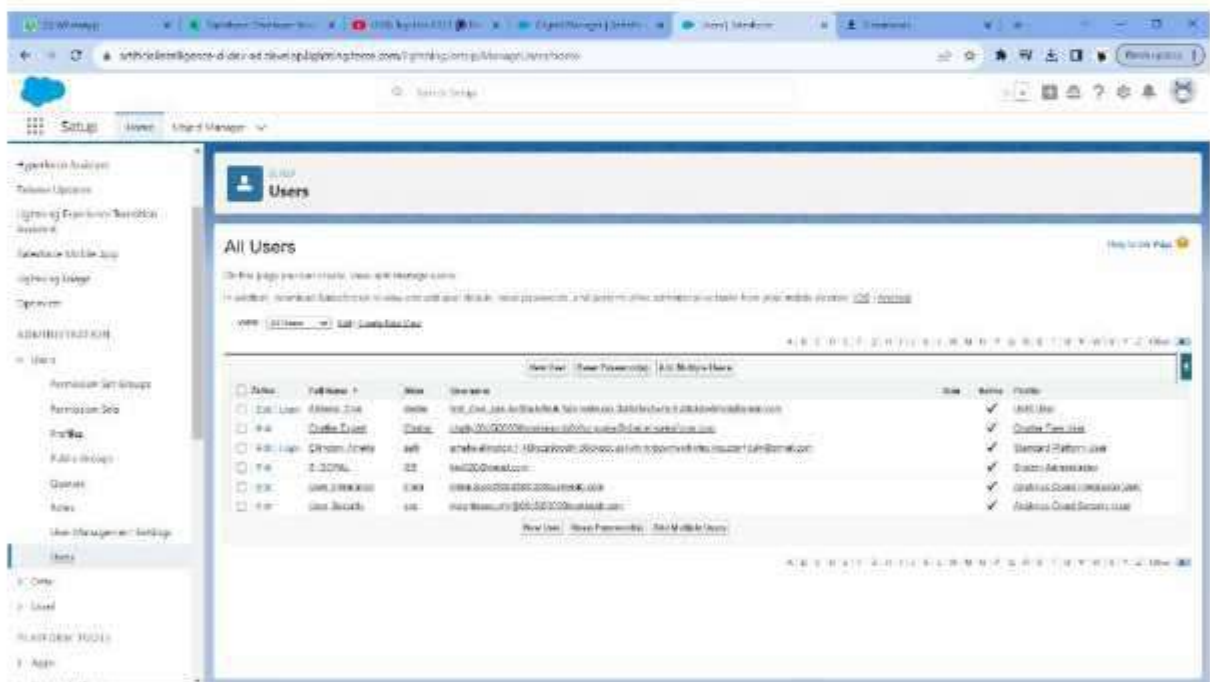
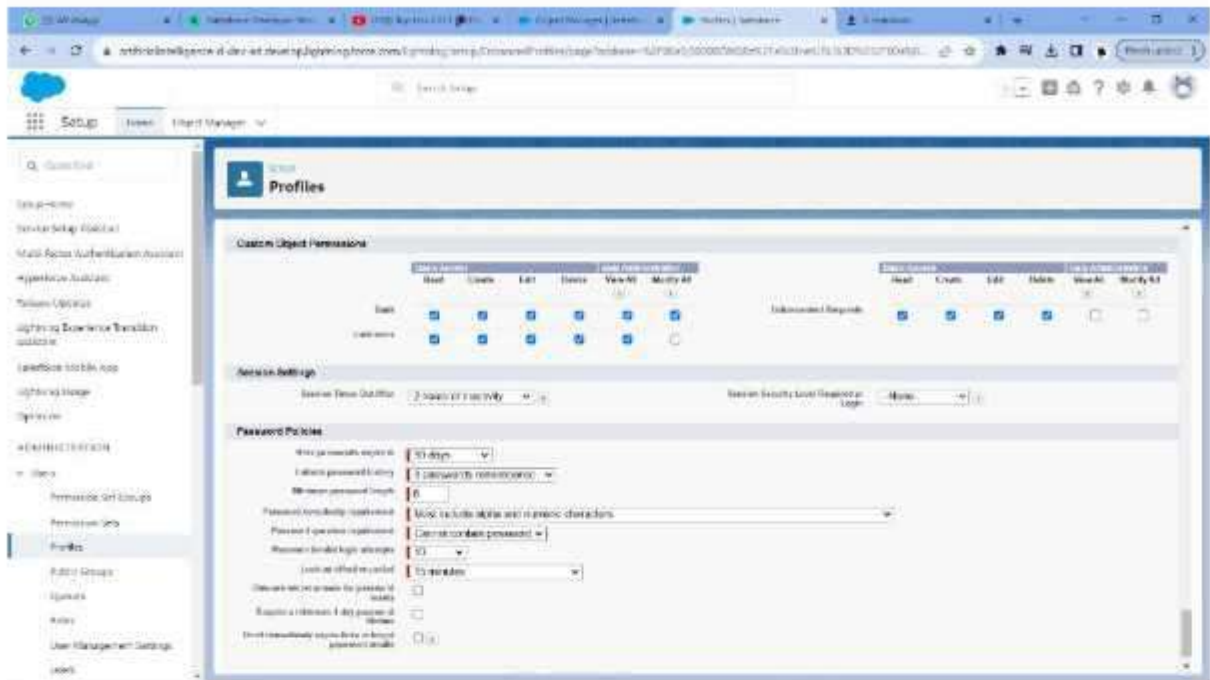
2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

Solution:

Step 1: Create two separate custom profiles, one for User A and one for User B.







Setup Users

New User

User Edit New New & More Cancel

General Information

First Name:

Last Name:

Job:

Email:

Username:

Phone:

Company:

Department:

Address:

Role:

Full:

New Location:

Profile:

Active: ☒

Marketing User: ☐

Office User: ☐

Inventory User: ☐

Flow User: ☐

Service Cloud User: ☐

Service Center User: ☐

Service Provider User: ☐

WOC User: ☐

Contract User Type:

Resource Monthly Address Limit:

Resource Monthly Work Order Limit:

High Capacity: Follow in Chain: ☐

Local Uploading Paper Address Scanning: ☐

Setup Mode:

Setup Users

New User

User Edit New New & More Cancel

General Information

First Name:

Last Name:

Job:

Email:

Username:

Phone:

Company:

Department:

Address:

Role:

Full:

New Location:

Profile:

Active: ☒

Marketing User: ☐

Office User: ☐

Inventory User: ☐

Flow User: ☐

Service Cloud User: ☐

Service Center User: ☐

Service Provider User: ☐

WOC User: ☐

Contract User Type:

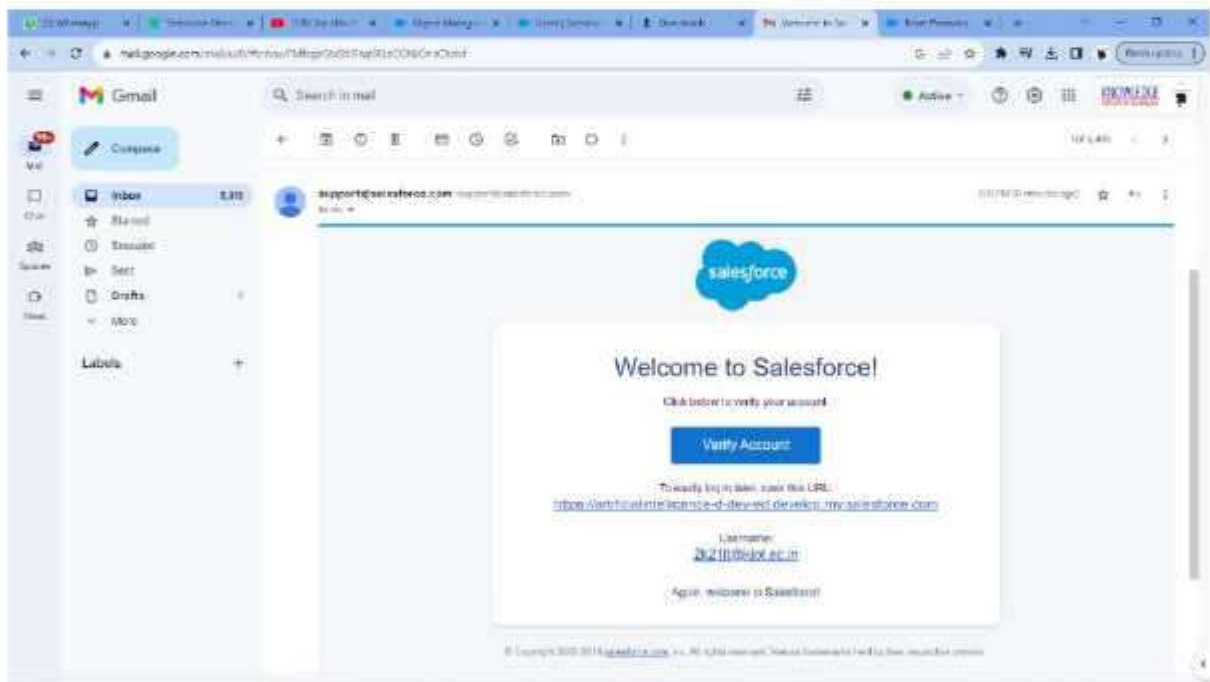
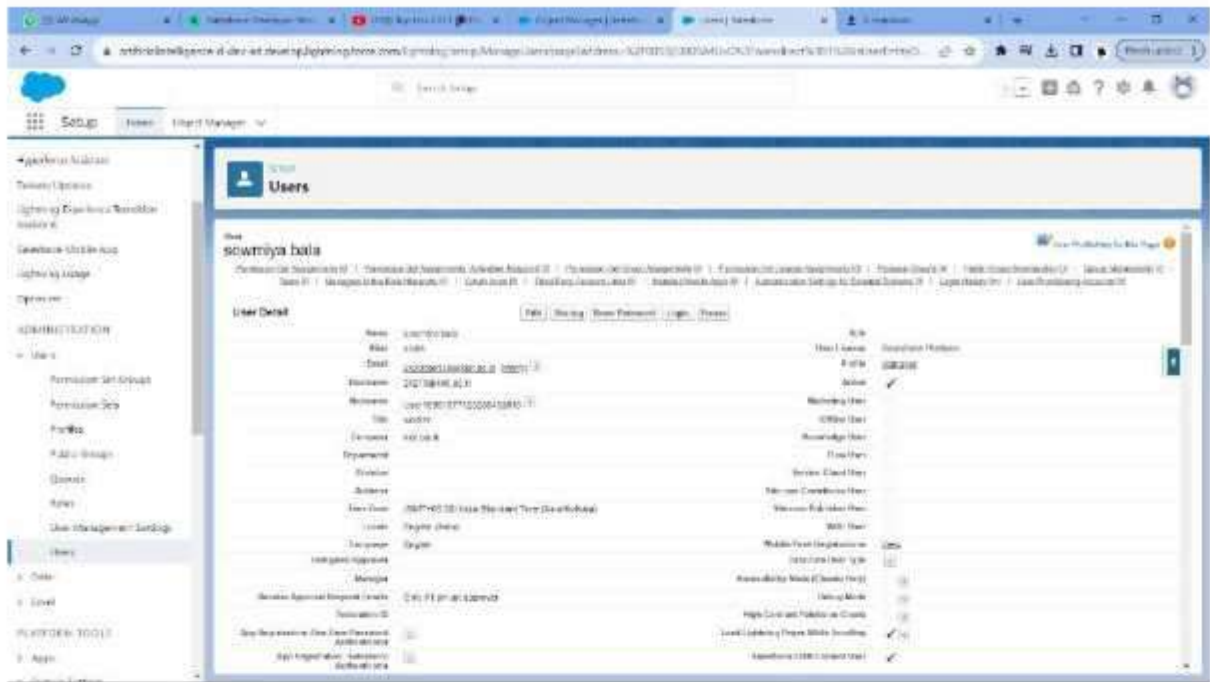
Resource Monthly Address Limit:

Resource Monthly Work Order Limit:

High Capacity: Follow in Chain: ☐

Local Uploading Paper Address Scanning: ☐

Setup Mode:



salesforce

Change Your Password

Enter a new password for **2b2b@bot.acad**. Make sure to include at least:

- ☒ 8 characters
- ☒ Uppercase
- ☒ Lowercase

* New Password:

100%

* Confirm New Password:

100%

Security Question:

* Answer:

[Change Password](#)

Password must not change by 11/20/2022, 1:23 pm

login | Salesforce

salesforce

Username:

Password:

[Log In](#)


☐ Remember Me

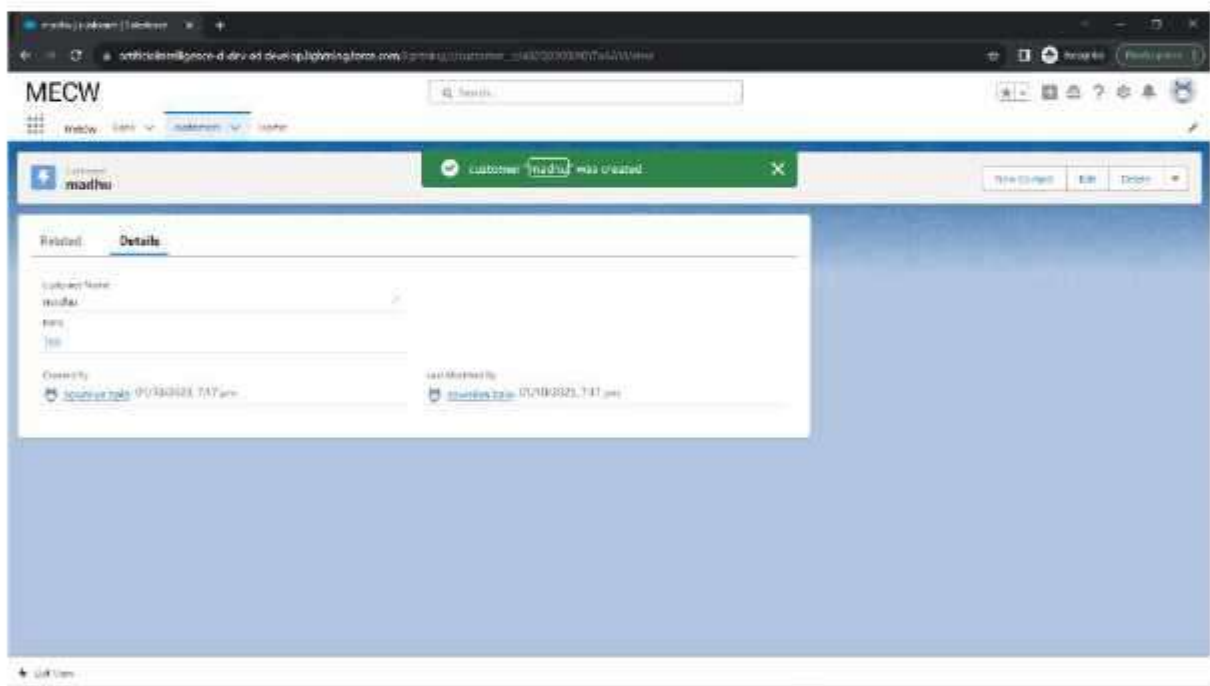
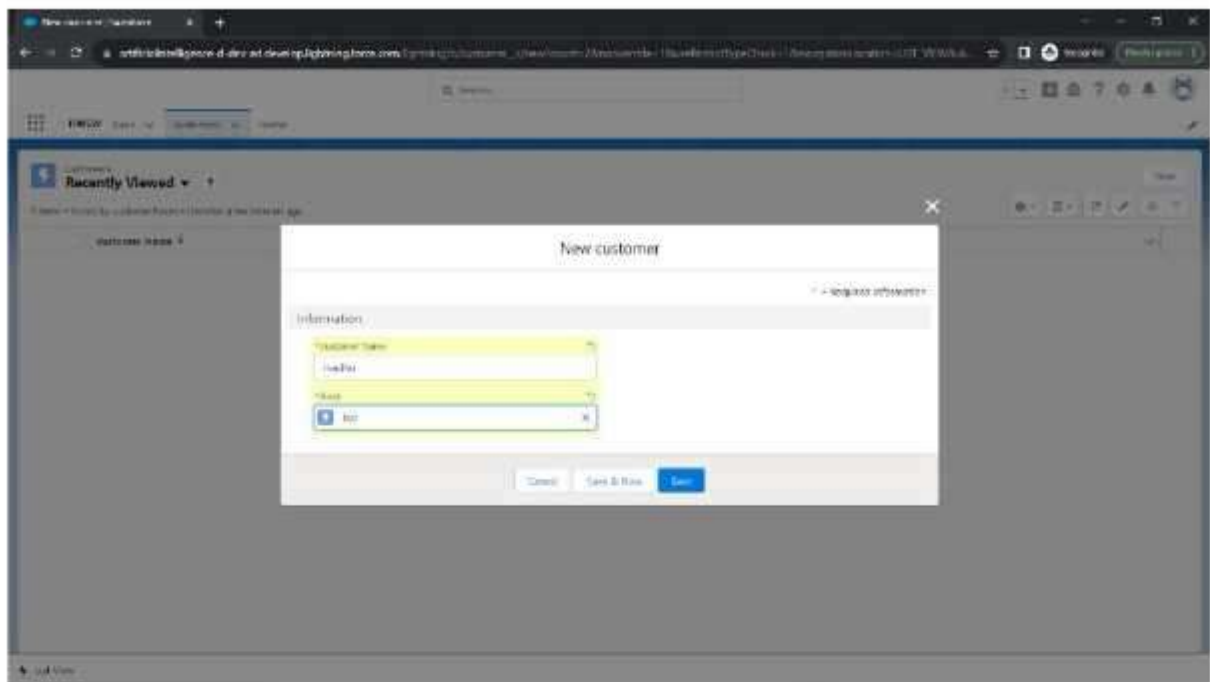
[Forgot Your Password?](#)

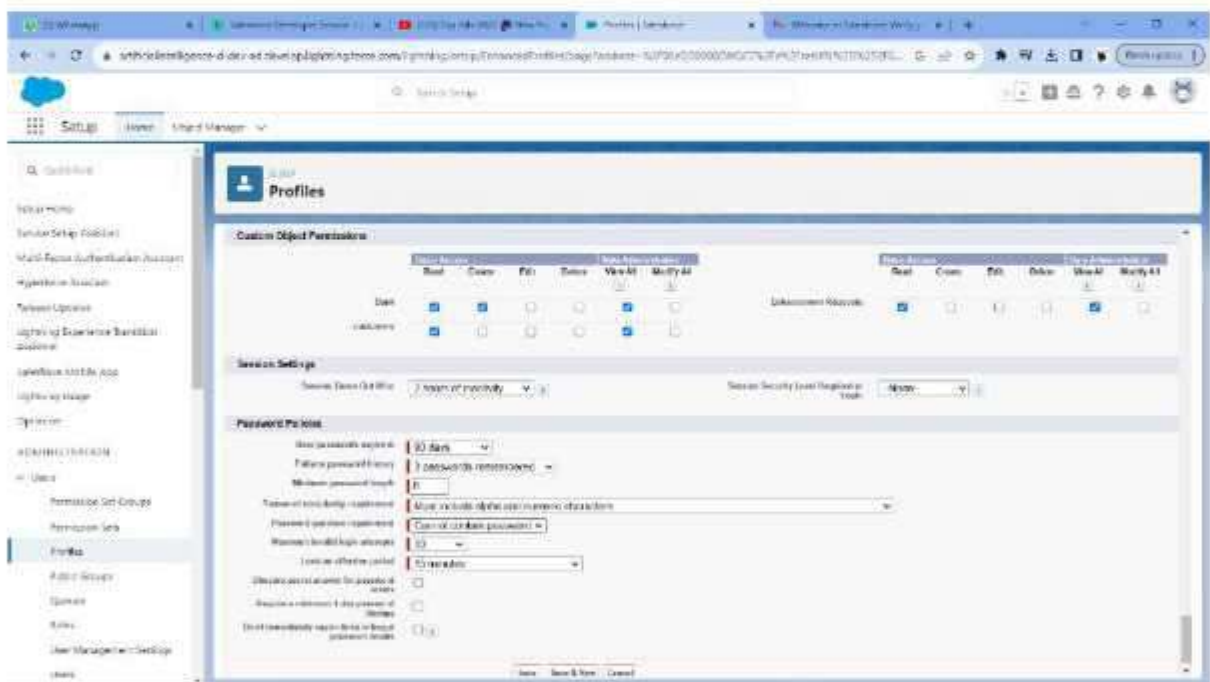
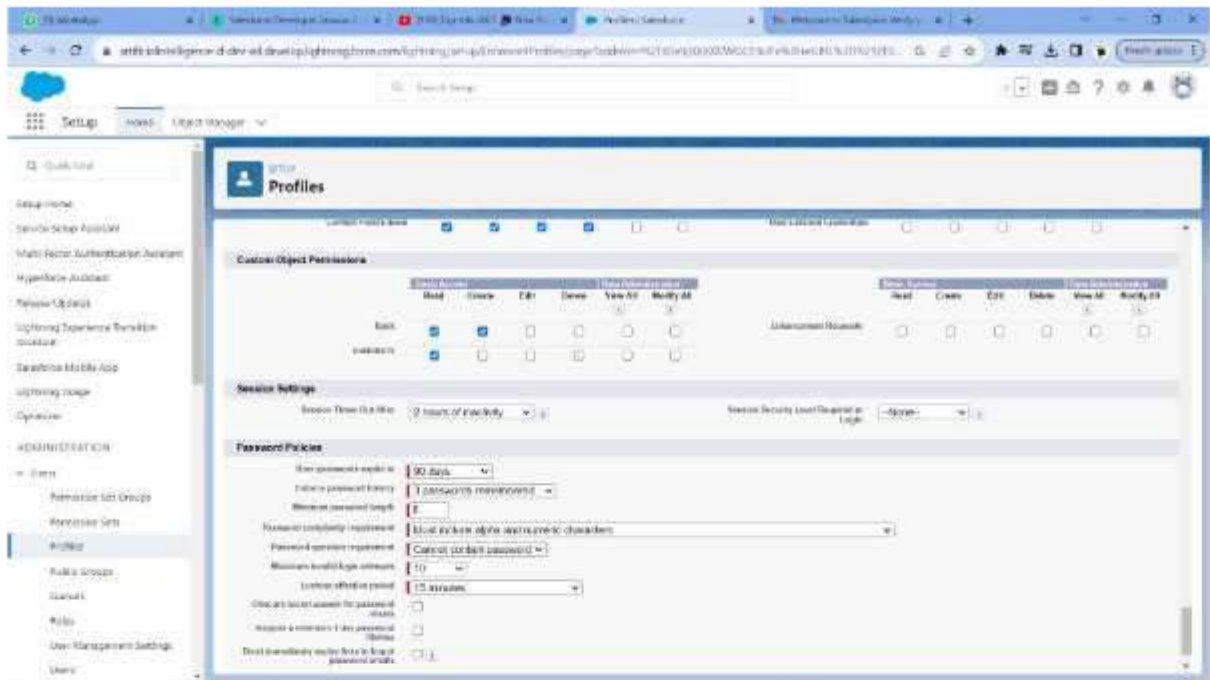
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Join us for the future of
trusted enterprise AI,
streaming on Salesforce+.

WATCH ON DEMAND

 **AI Day**





Setup Users

Working Address

Street

City

Apartment Code

Post Office Code

Country

Single Sign-On Information

External ID

Locale Settings

Time Zone

Locale

Language

Approval Settings

Approval Process

Approval

Approval Approval Code

☐ Connect new address and notify user immediately

Save Save & Next Cancel

Setup Users

Working Address

Street

City

Apartment Code

Post Office Code

Country

Single Sign-On Information

External ID

Locale Settings

Time Zone

Locale

Language

Approval Settings

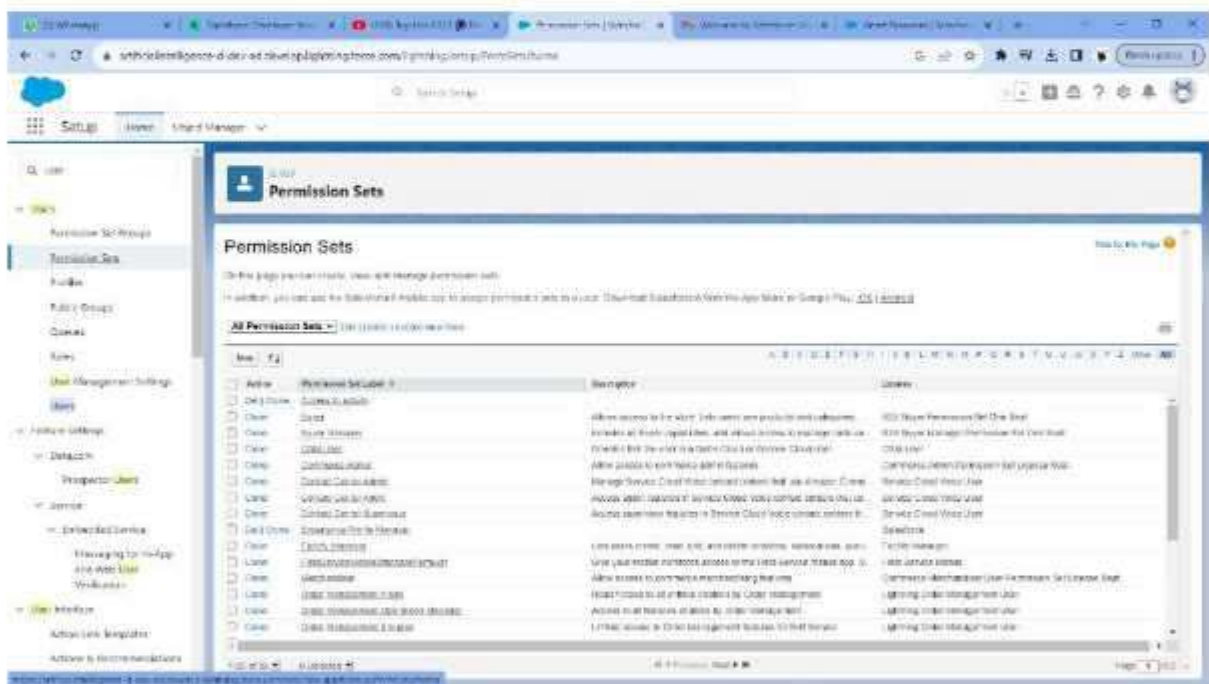
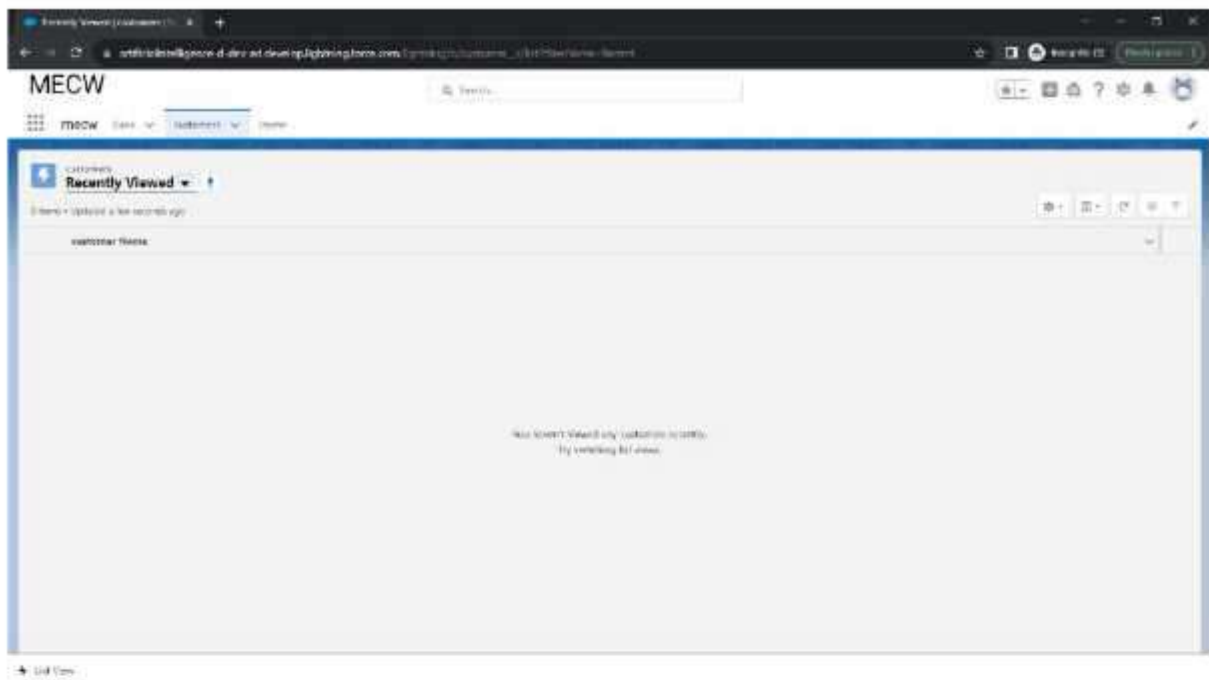
Approval Process

Approval

Approval Approval Code

☐ Connect new address and notify user immediately

Save Save & Next Cancel



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:

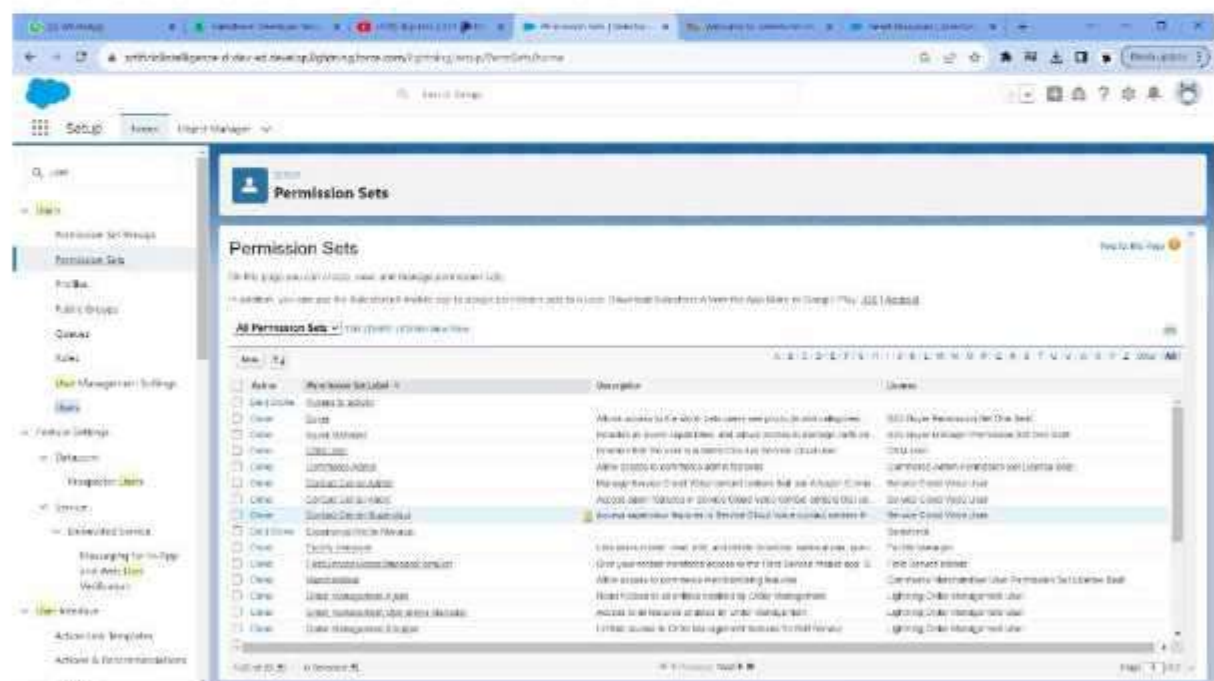
- Ensure that the Account records are owned by the respective users, with User A owning their records and User B owning their records.

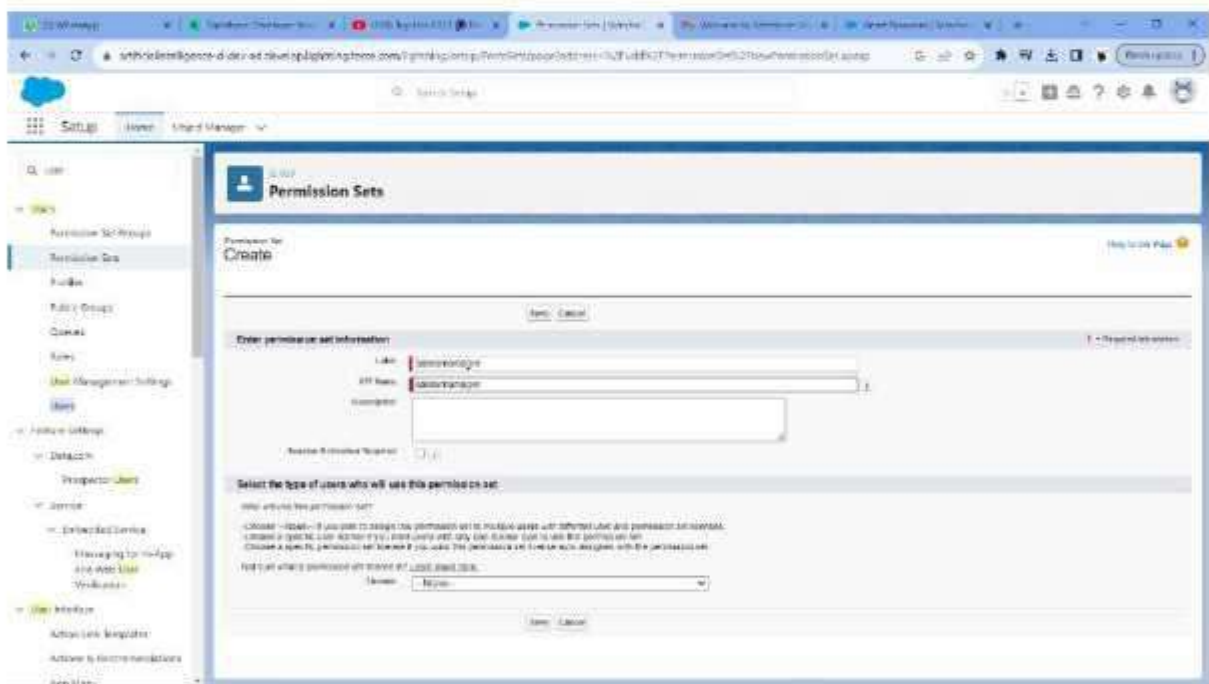
Organization-Wide Defaults:

- 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 | Users | User Manager

Q: User

Users

- Permission Set Groups
- Permission Sets**
- Profile
- Policy Groups
- Groups
- Rules
- User Management Settings
- Users

Policy Settings

- Default
- Inspector User

Service

- Unpublished Service
- Handling for In-App and Web Apps
- Webhooks

User Interface

- Action Link Inspector
- Action & Recommendations

Permission Sets

Permission Set: salesmanager

From Settings | Close | Details | Add Properties | Manage Subproperties

Inspector Set Overview | Close | Actions | Search

Done | Cancel

Set Settings

Available | Hidden

Object Permissions

Permission Name	Allowed
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Full	<input type="checkbox"/>
Delete	<input type="checkbox"/>
Web API	<input type="checkbox"/>
Webhook	<input type="checkbox"/>

Field Permissions

Field Name	Read Access	Edit Access
id	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
created by	<input type="checkbox"/>	<input type="checkbox"/>
last modified by	<input type="checkbox"/>	<input type="checkbox"/>

Setup | Users | User Manager

Q: User

Users

- Permission Set Groups
- Permission Sets**
- Profile
- Policy Groups
- Groups
- Rules
- User Management Settings
- Users

Policy Settings

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- Action & Recommendations

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Permission Set: salesmanager

From Settings | Close | Details | Add Properties | Manage Subproperties

Inspector Set Overview | Close | Actions | Search

Done | Cancel

Set Settings

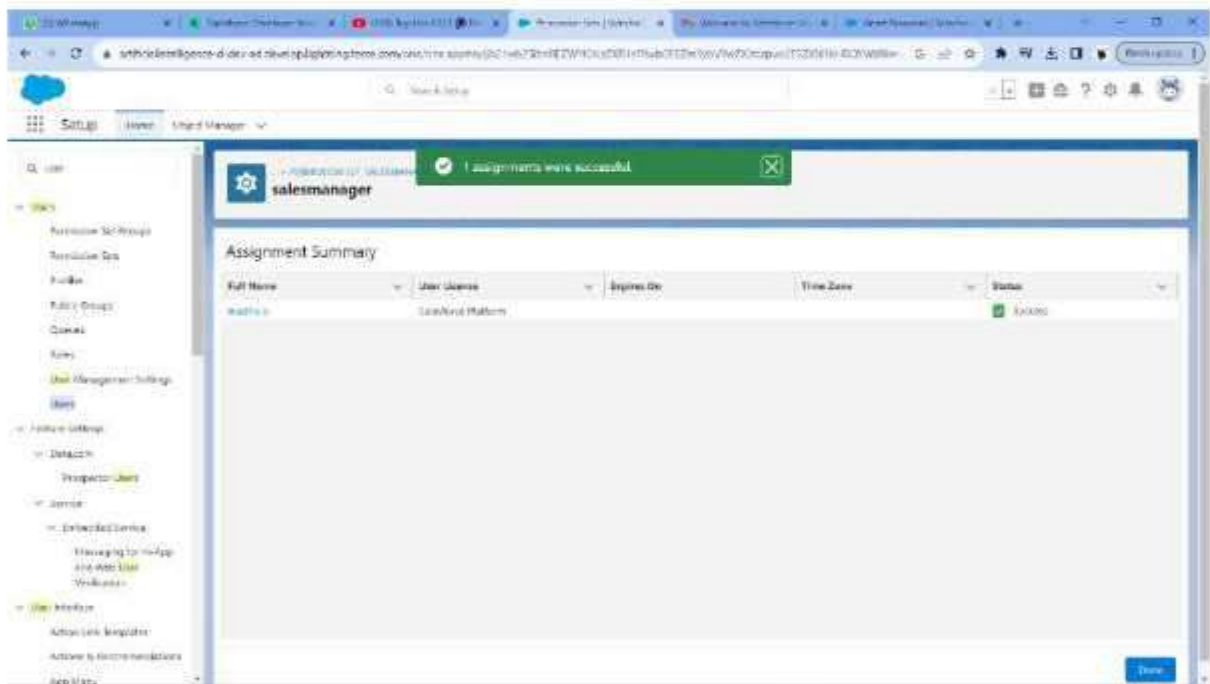
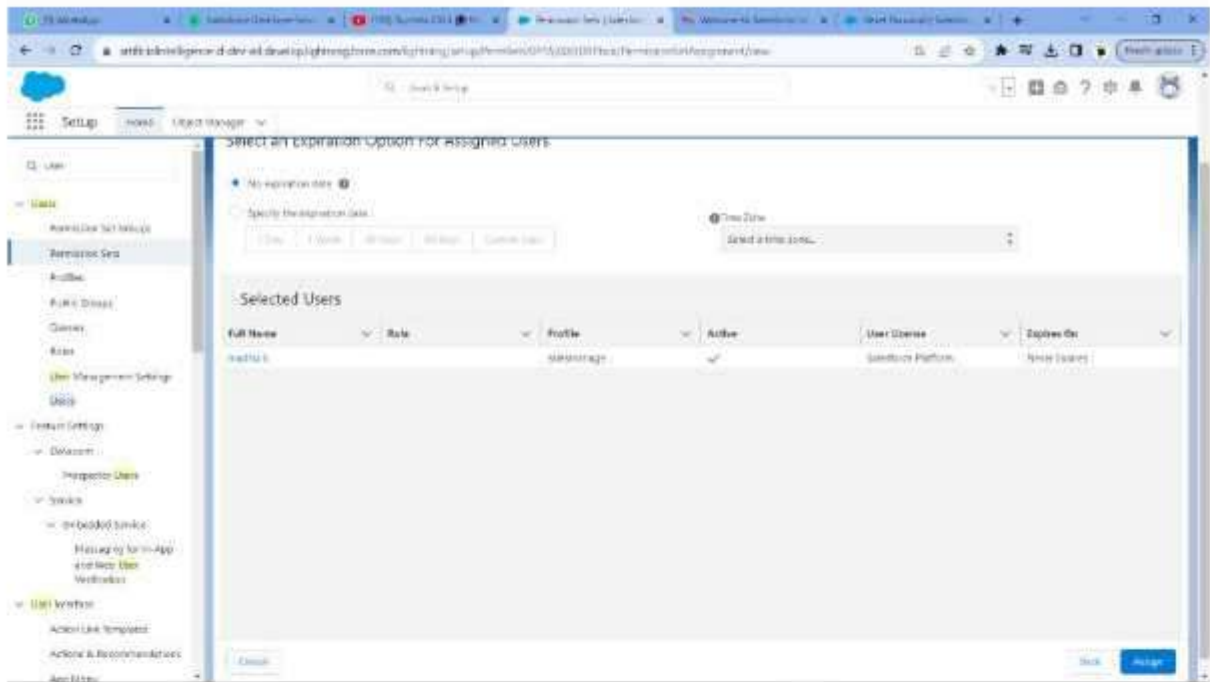
Available | Hidden

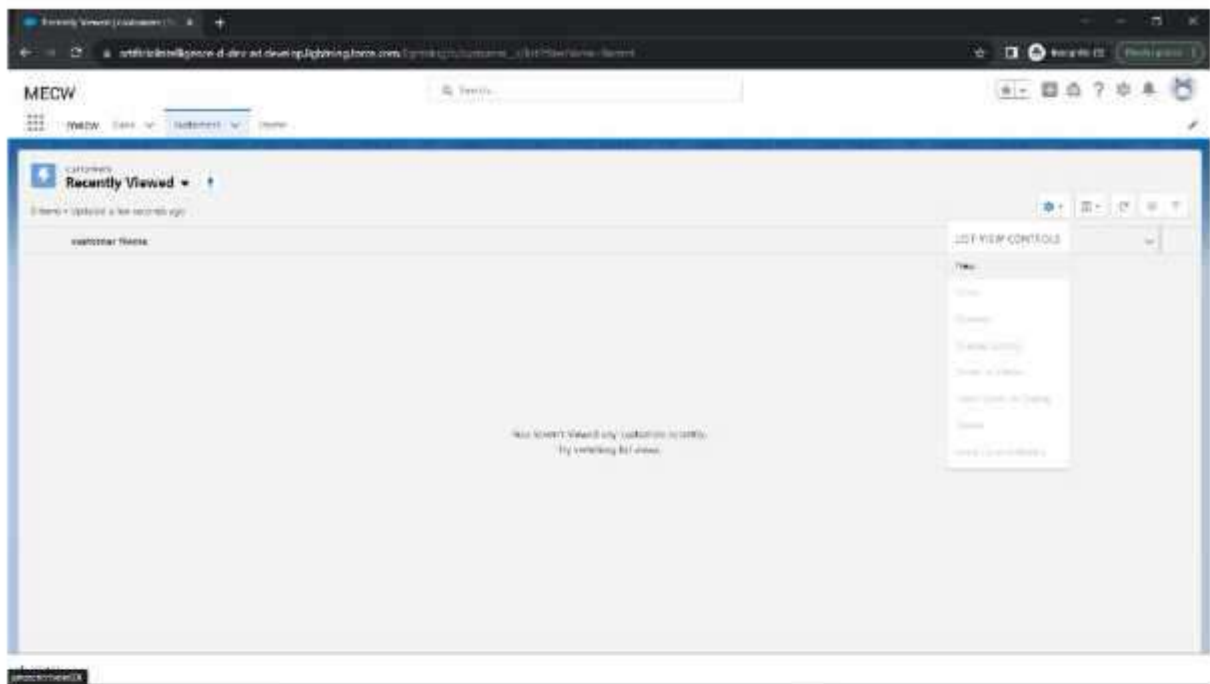
Object Permissions

Permission Name	Allowed
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Full	<input type="checkbox"/>
Delete	<input type="checkbox"/>
Web API	<input checked="" type="checkbox"/>
Webhook	<input type="checkbox"/>

Field Permissions

Field Name	Read Access	Edit Access
id	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
created by	<input type="checkbox"/>	<input type="checkbox"/>
last modified by	<input type="checkbox"/>	<input type="checkbox"/>



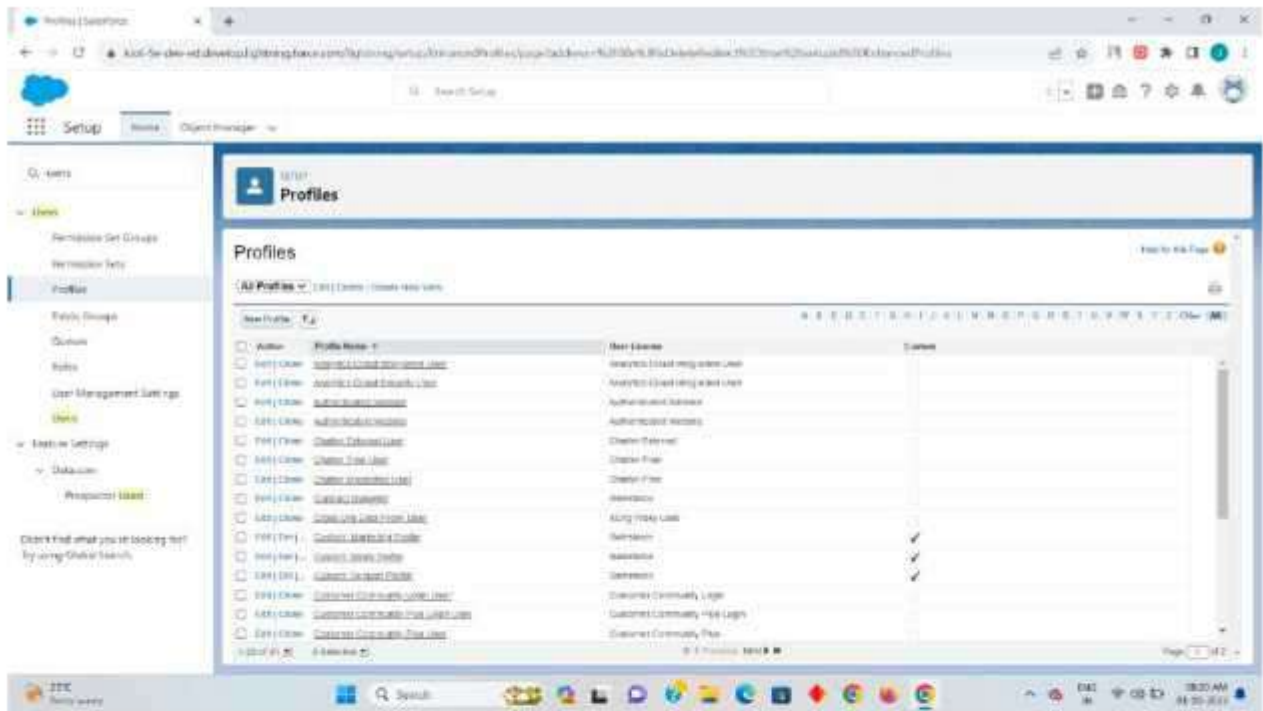


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

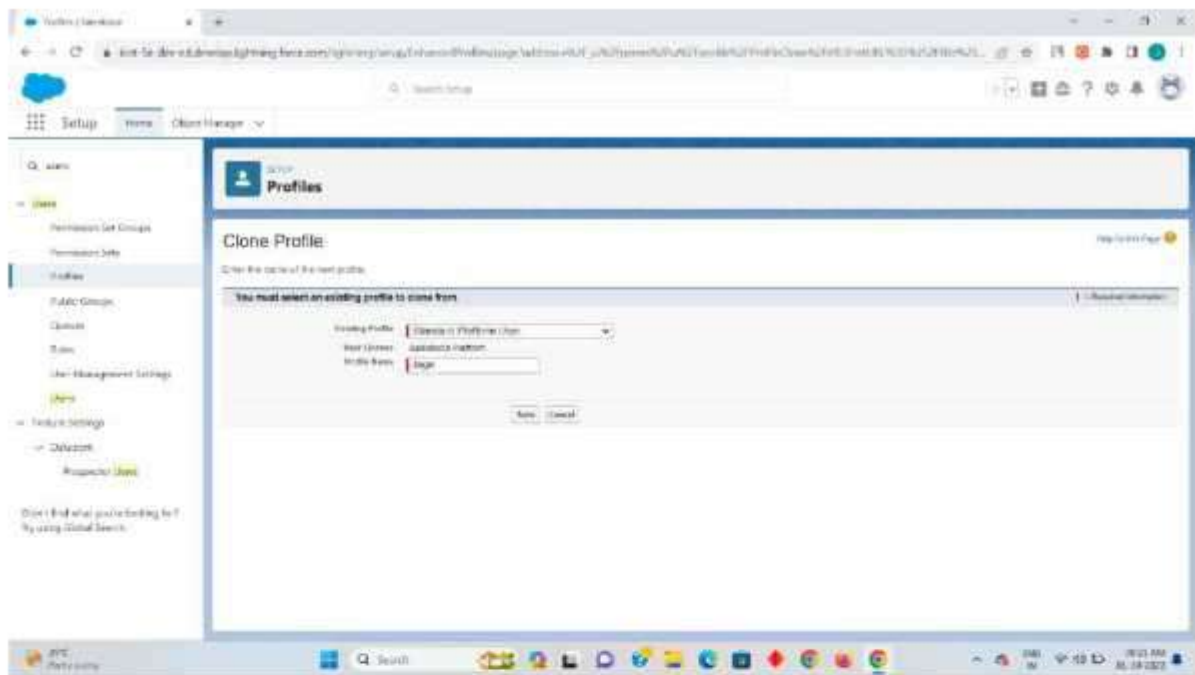
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

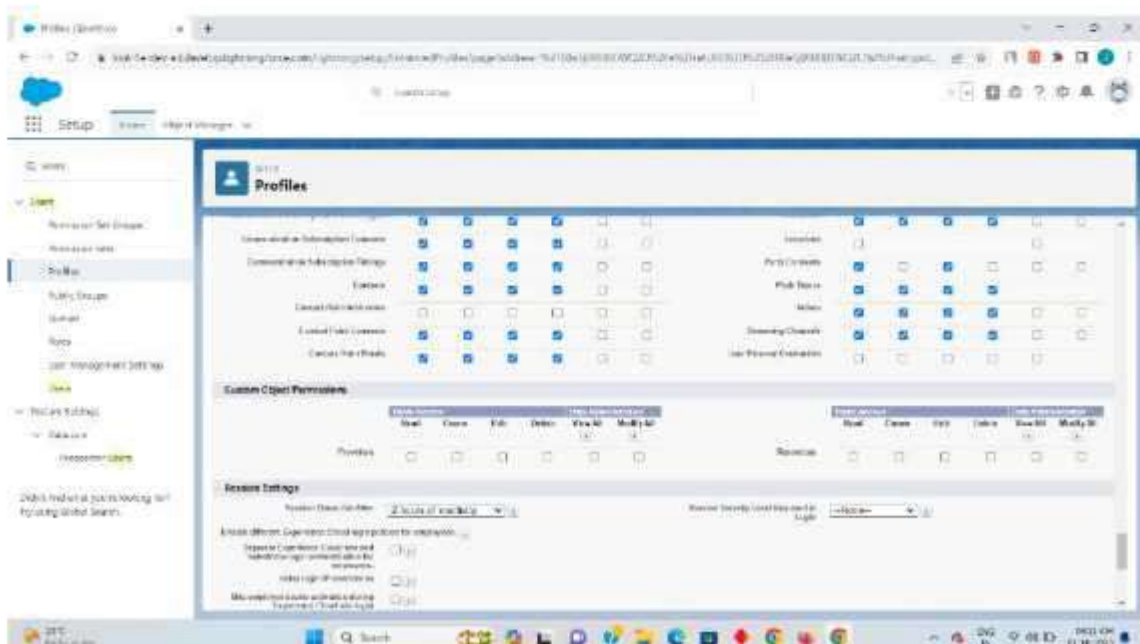
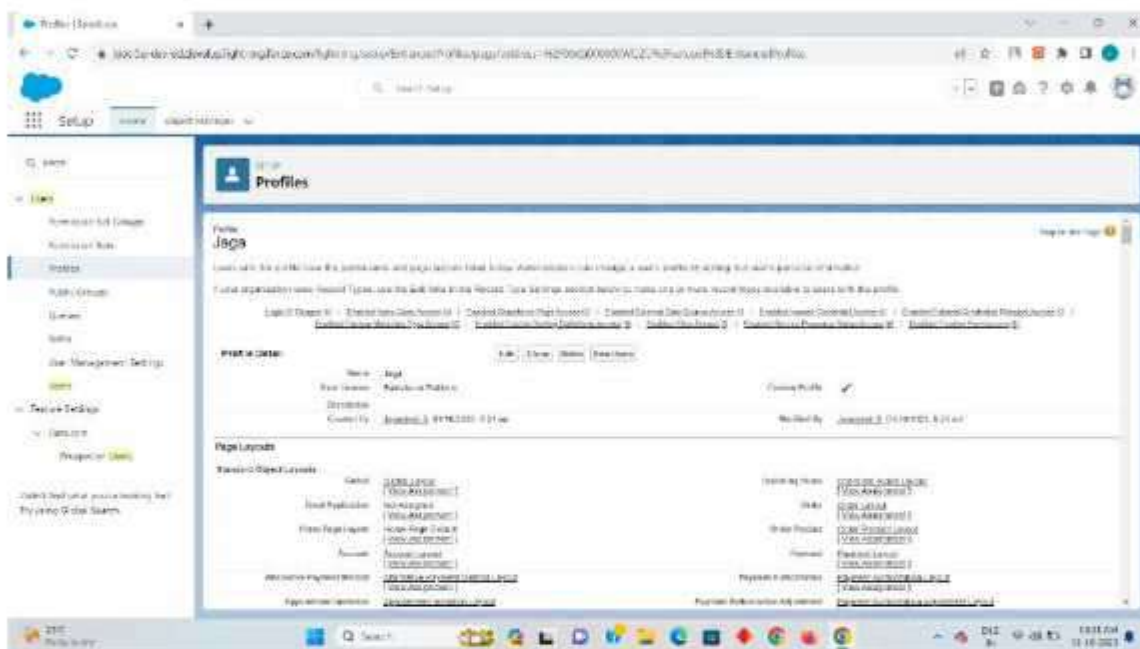
Click on the new to create a new profile along with the label and Api

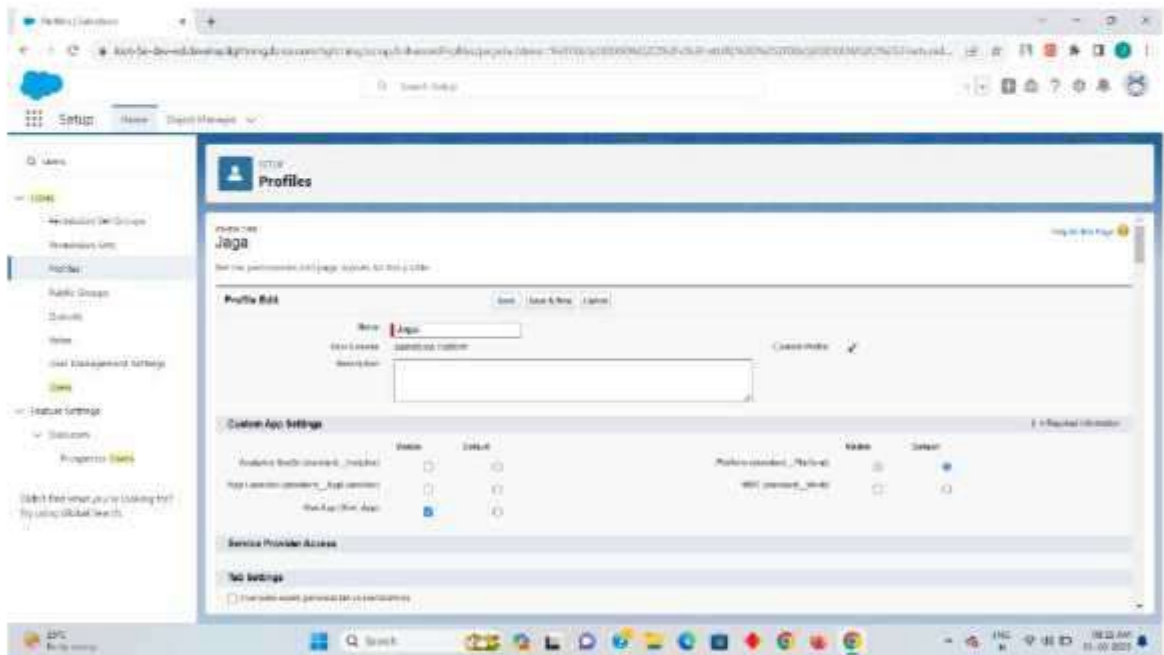
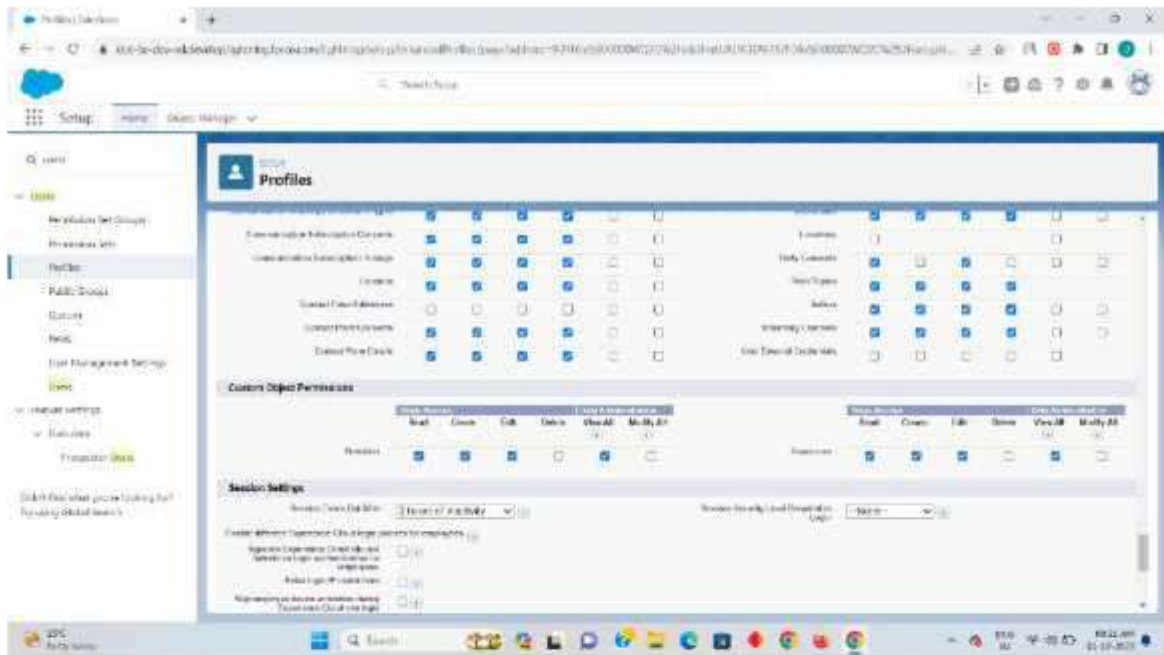


Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.

Step 3:

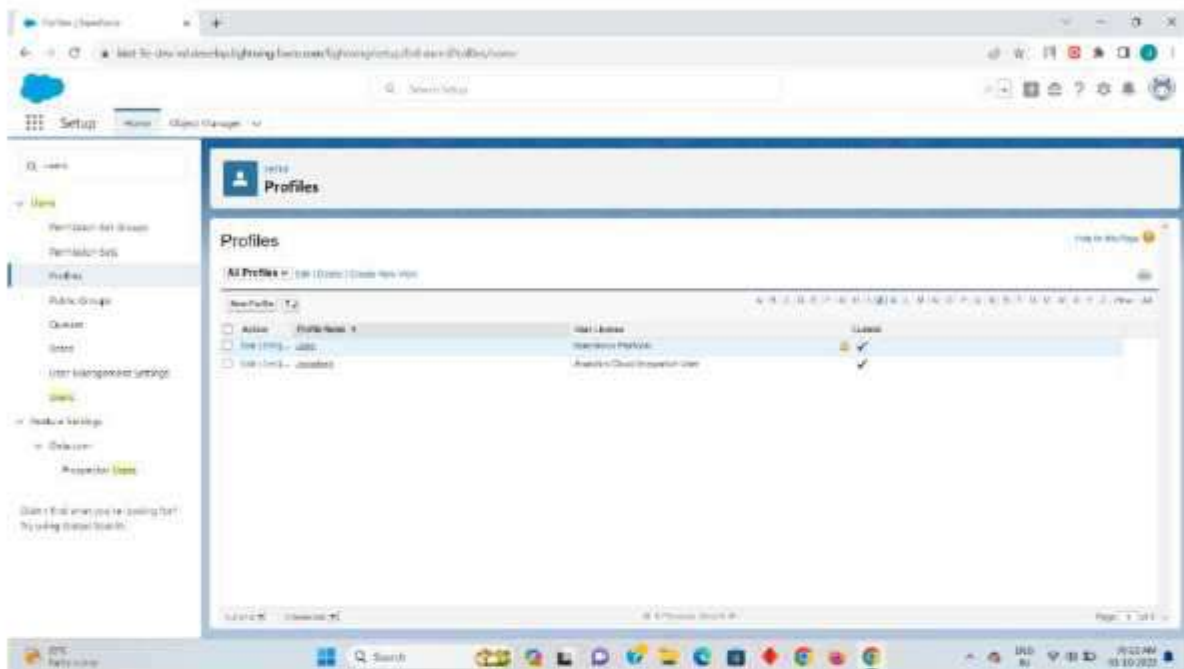
Now click on the edit and scroll down to custom object settings and enable the read,create,edit and view options. After that click on save.





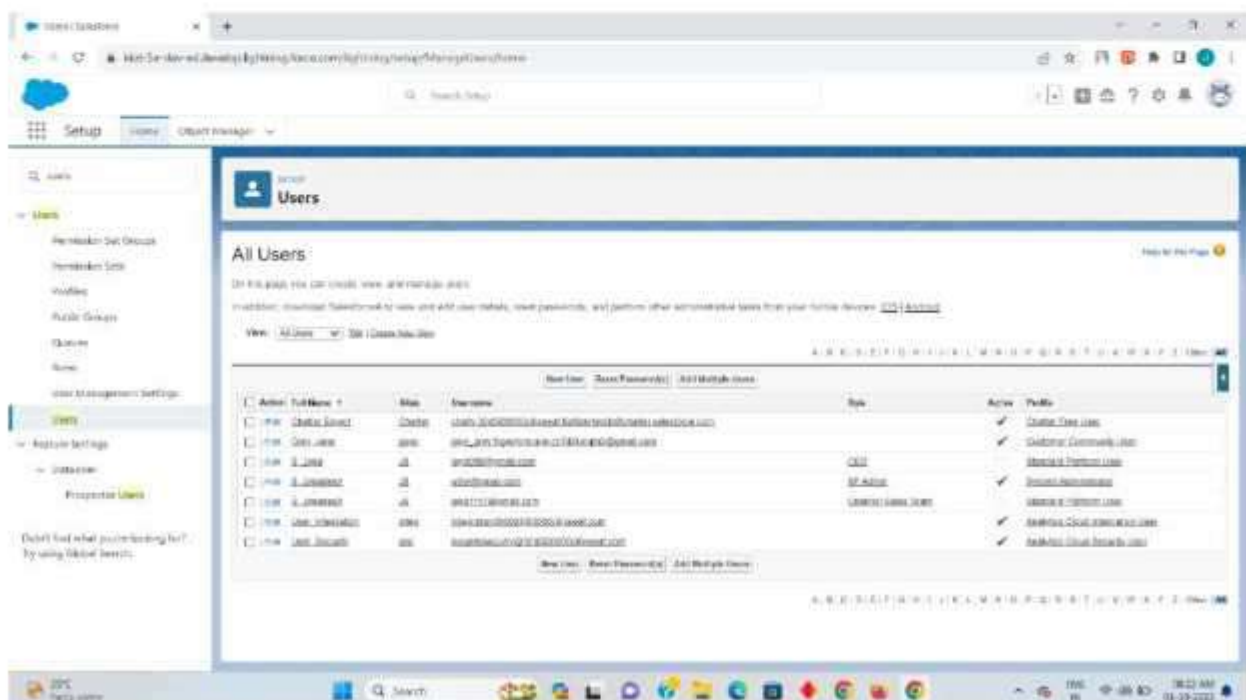
Step 4

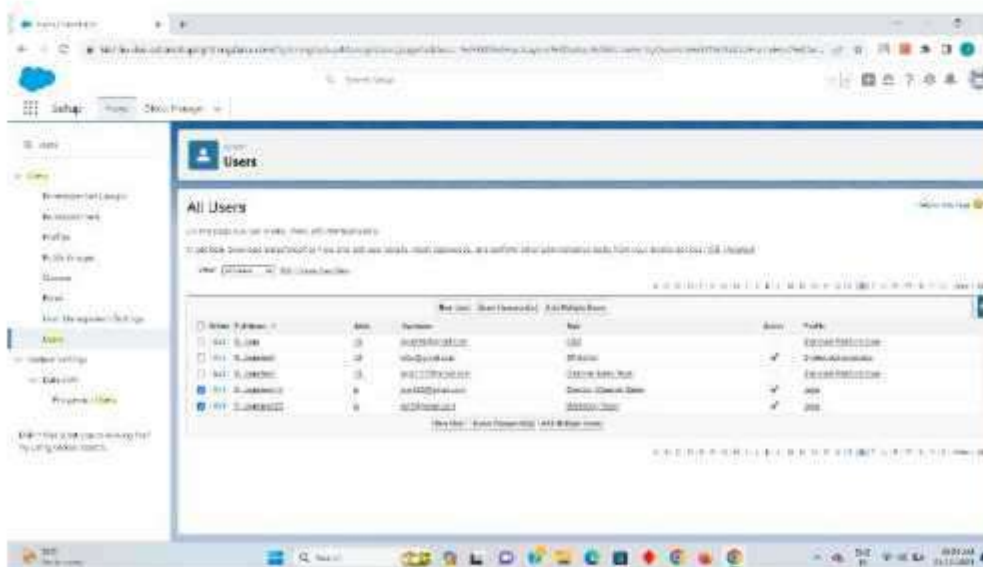
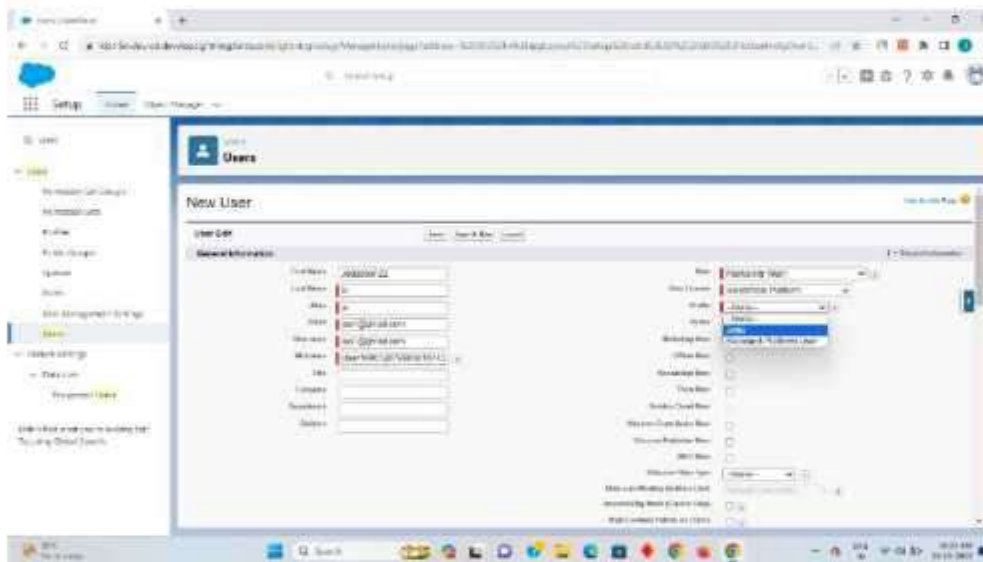
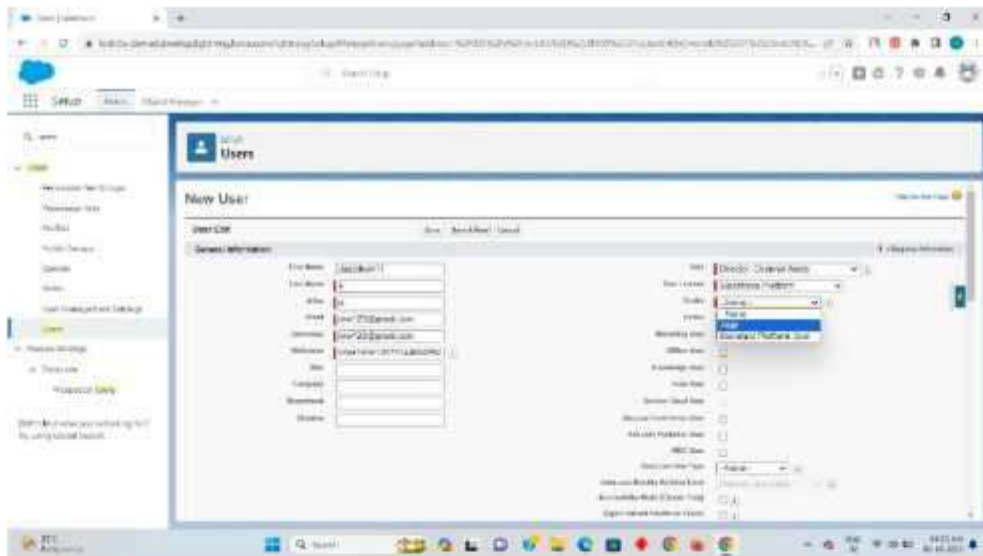
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it



Step 5:

Now create two users by enter into the Setup-quick 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 been created with alternate name but with the same user profile and once the two user are create click on save.



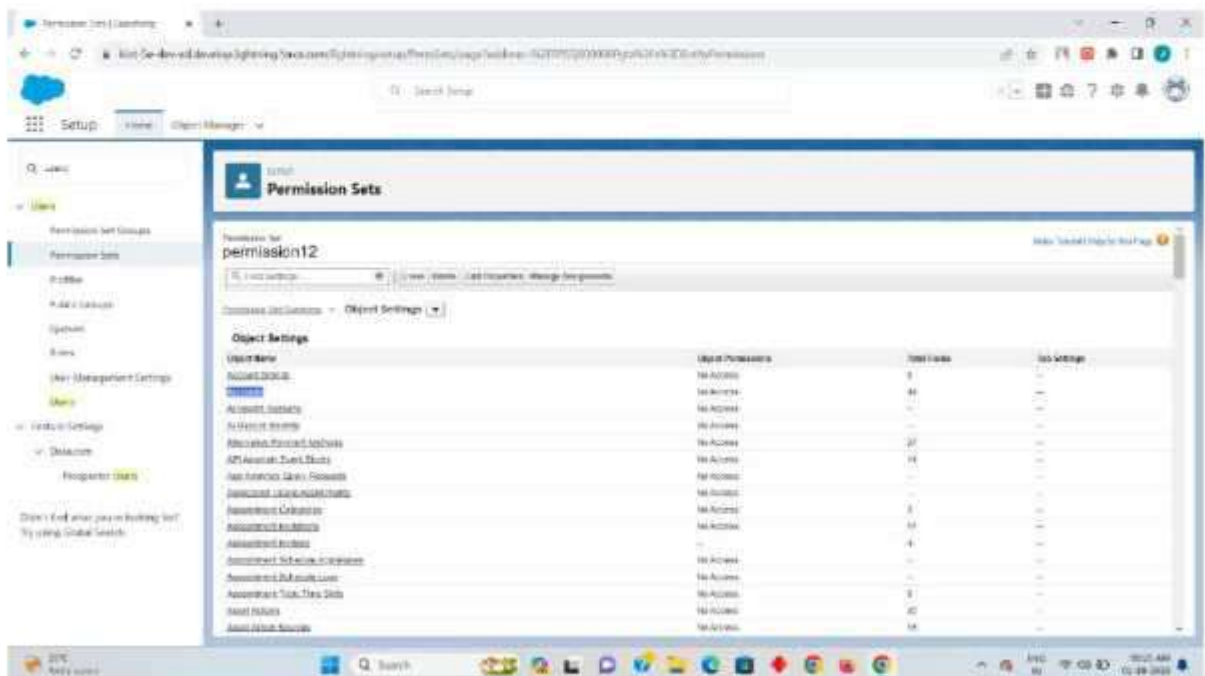


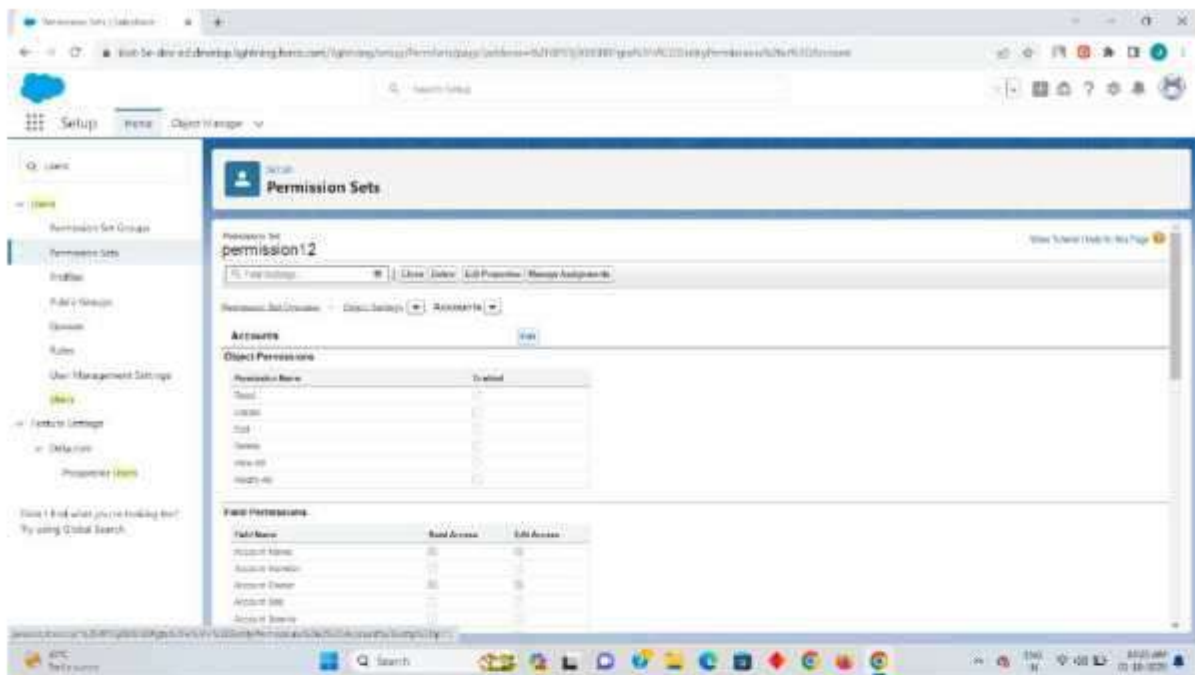
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

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

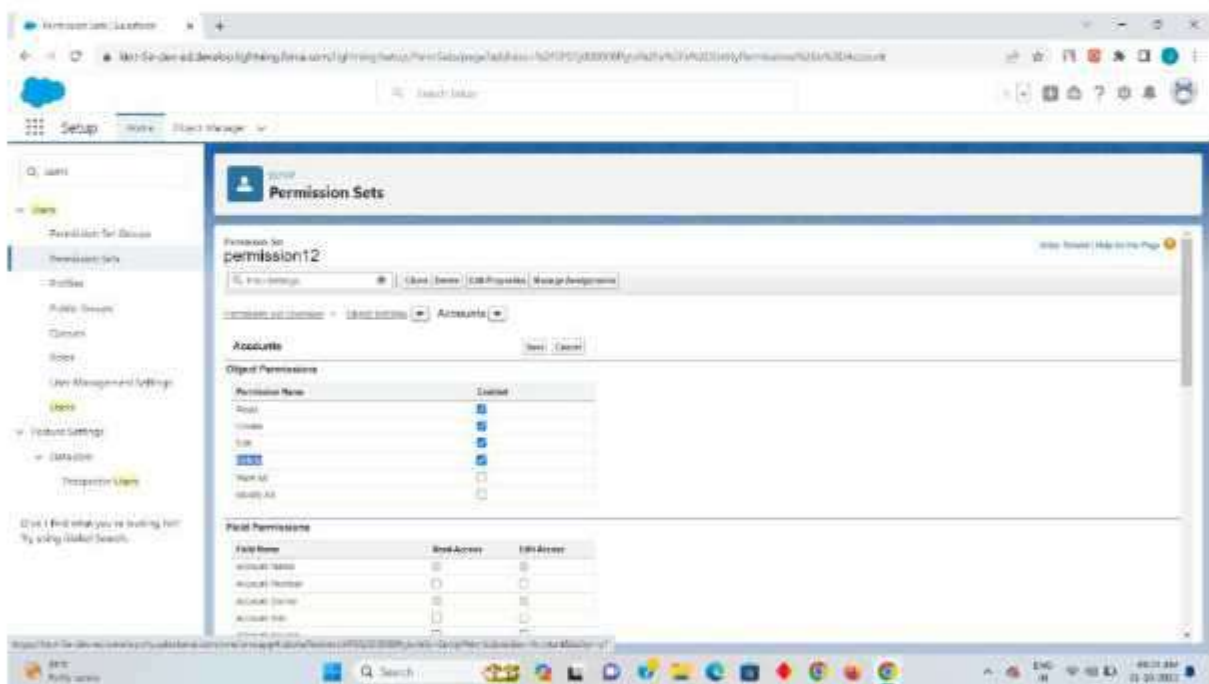
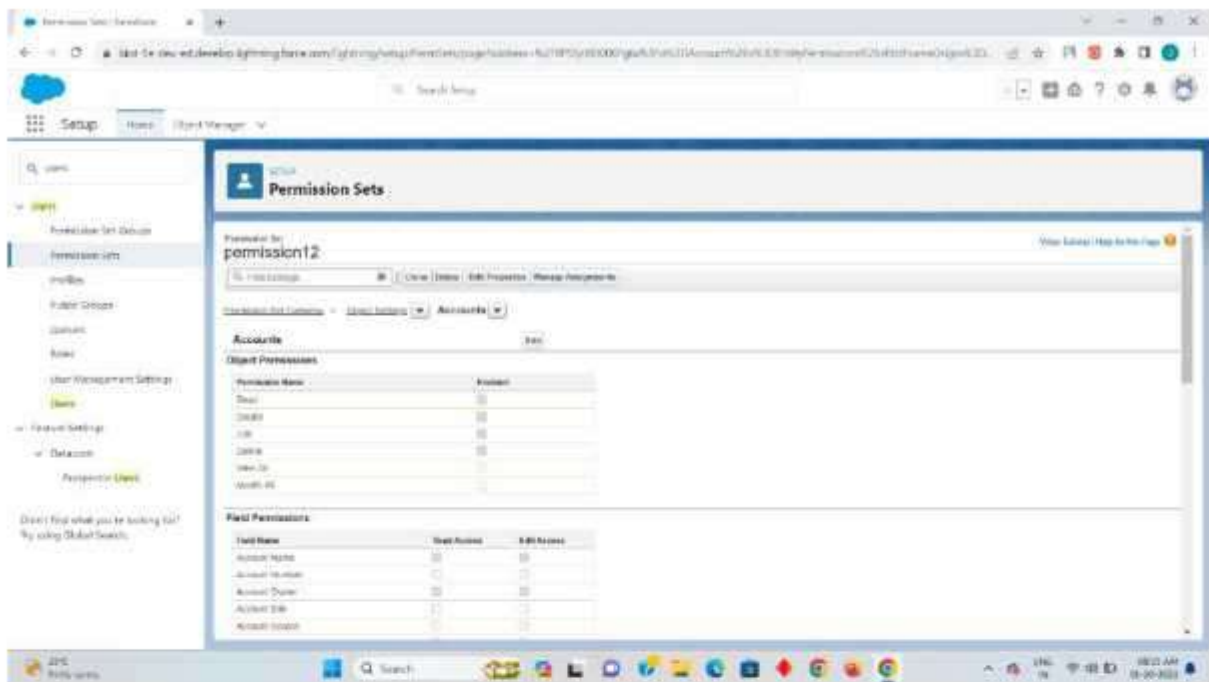
setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.





Step 7:

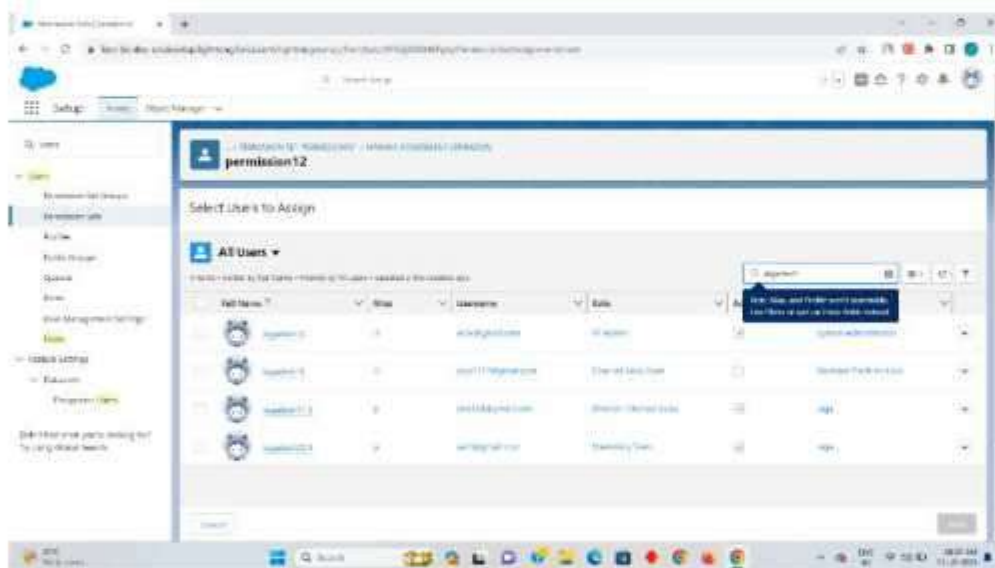
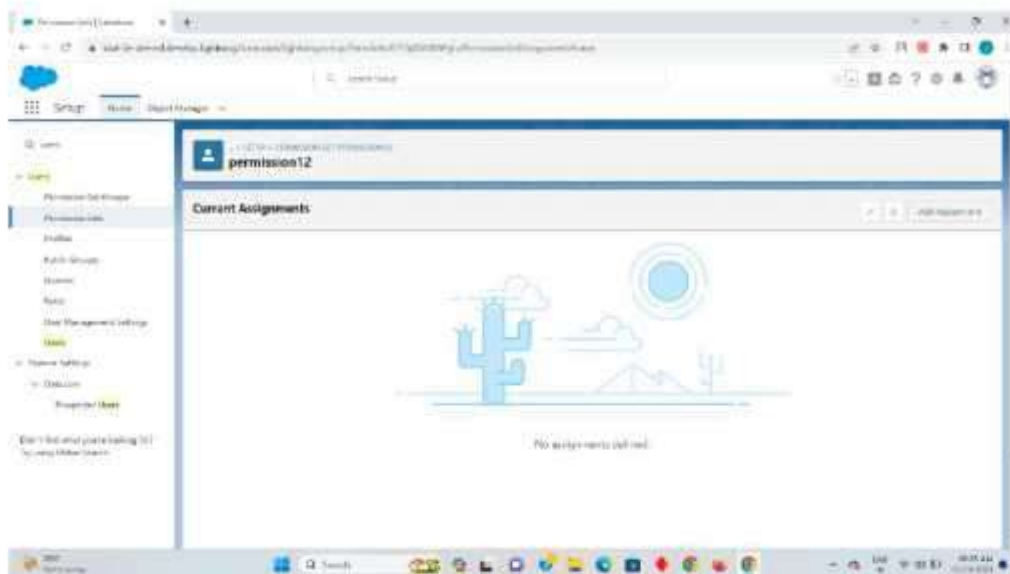
Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

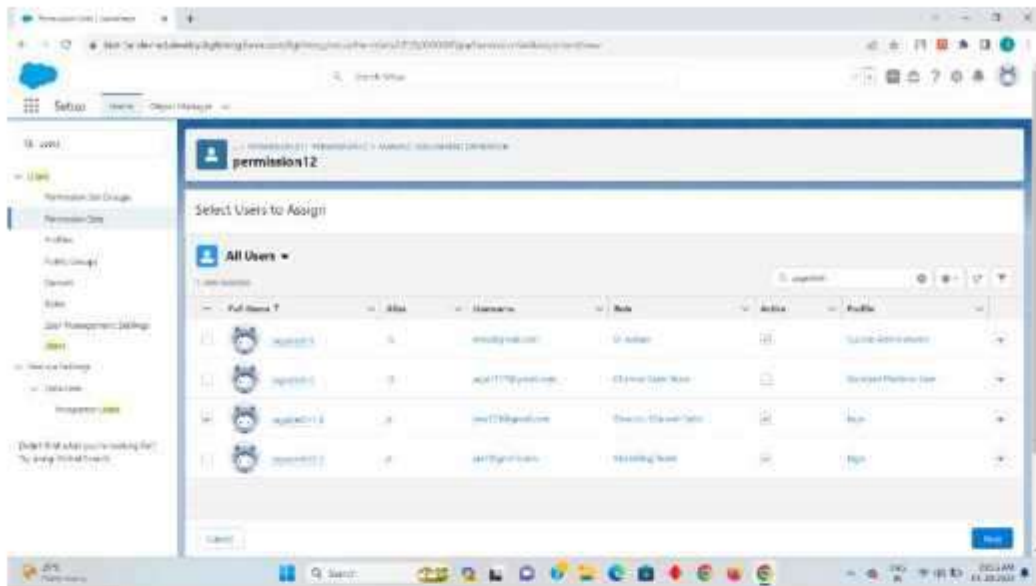


Step 8

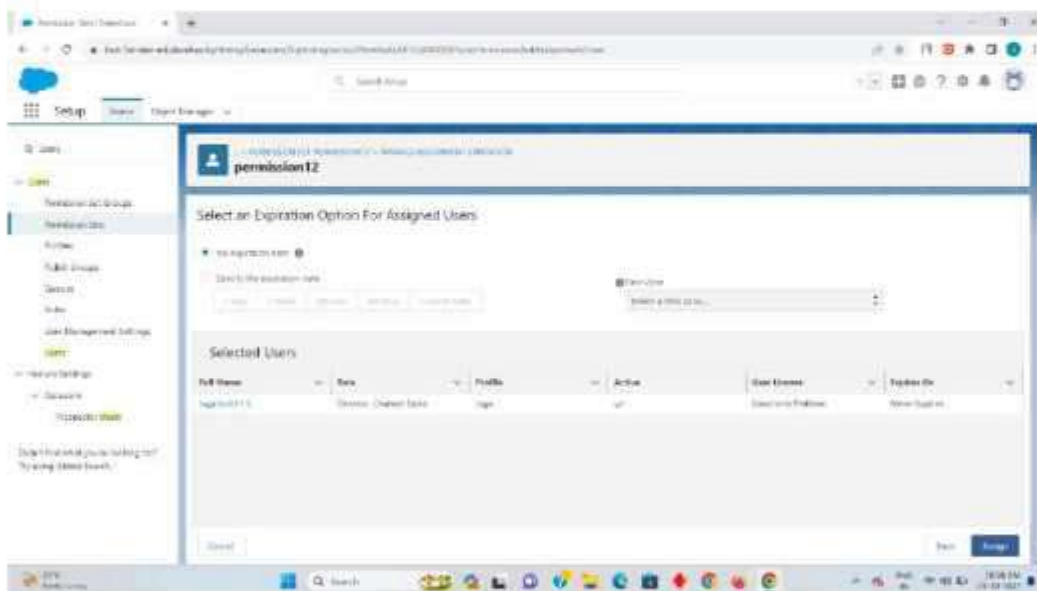
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific

selected user can have a special access as delete on it.

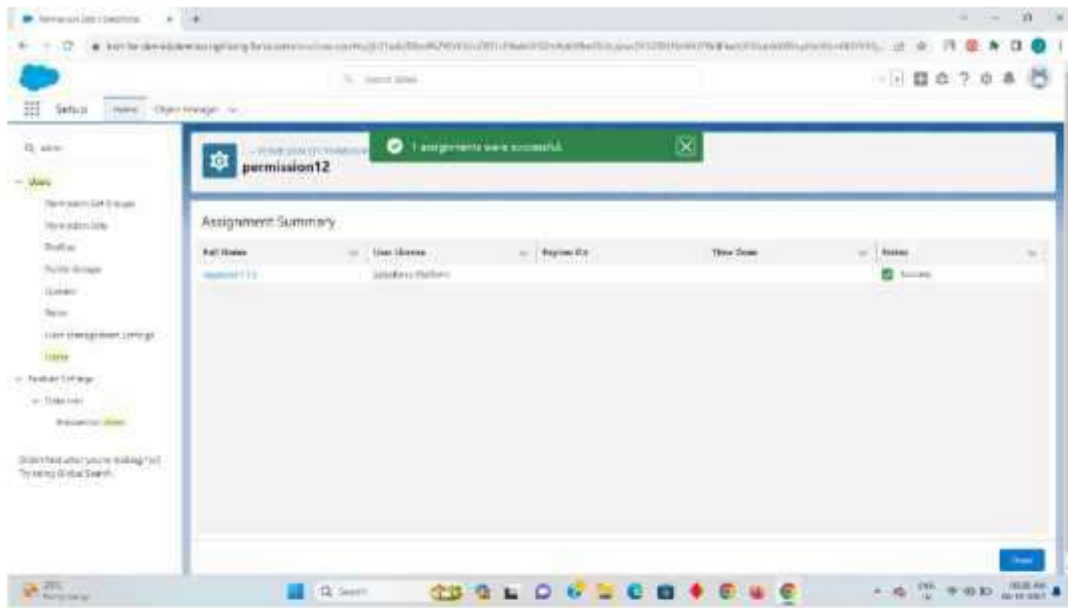




Click on next.



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**.

screenshot.

The screenshot shows a configuration page for an email template titled 'Thank You Email - Survey'. The page has a top bar with 'Email Template' and the title, and buttons for 'Edit in Builder', 'Edit', and 'Clone'. Below the title bar are two tabs: 'Details' (selected) and 'Related'. The 'Details' tab contains two sections: 'Information' and 'Message Content'. The 'Information' section has 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' (checked). The 'Message Content' section has a 'Subject' field (Thank You For Completing Our Survey!) and an 'Enhanced Letterhead' checkbox (checked). Below these is a large 'HTML Value' field containing a placeholder image on the left, a text block with a greeting 'Hi {{{Survey_Result__c.Name__c}}},', a paragraph of thank-you text, another paragraph, and a sign-off 'Thanks, Automation Champion', and a second placeholder image on the right. At the bottom is an 'Additional Information' section with 'Created By' (Rakesh Gupta, 12/21/2020, 4:23 PM) and 'Last Modified By' (Rakesh Gupta, 12/21/2020, 4:32 PM).

Email Template
Thank You Email - Survey Edit in Builder Edit Clone

Details Related

Information

Email Template Name
Thank You Email - Survey

Description

Made in Email Template Builder
☒

Related Entity Type
Survey Result

Folder
Public Email Templates

Message Content

Subject
Thank You For Completing Our Survey!

Enhanced Letterhead
☒

HTML Value

Hi {{{Survey_Result__c.Name__c}}},

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

Additional Information

Created By
Rakesh Gupta, 12/21/2020, 4:23 PM

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. 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 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		Selected Recipients
User: Integration User User: Rakesh Gupta User: Security User	<div>Add Remove</div>	Email Field: Email

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

Additional Emails:

From Email Address: Current User's email address Make this address the default From email address for this object's email alerts.

Save Save & New Cancel

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

1. Click **Setup**.
2. In the Quick Find box, type **Flows**.
3. Select **Flows** then click on the **New Flow**.
4. Select the **Screen Flow** option and click on **Next** and configure the flow as follows:
 1. **How do you want to start building: Freeform**
5. 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 dropdown list.
6. **Set Field Values for the Survey Result**
 1. Row 1:
 1. **Field: Comment__c**
 2. **Value: {!Comment}**
 2. Click **Add Row**
 3. Row 2:
 1. **Field: Email__c**
 2. **Value: {!Email.value}**
 4. Click **Add Row**
 5. Row 3:
 1. **Field: Name__c**
 2. **Value: {!Name.firstName}
 {!Name.lastName}**
 6. Click **Add Row**
 7. Row 3:
 1. **Field: Rating__c**
 2. **Value: {!Rating}**
7. Click **Done.**

Edit Create Records

Create Salesforce records using values from the flow.

* Label: * API Name:

Description:

How Many Records to Create

☒ One
☐ Multiple

How to Set the Record Fields

☐ Use all values from a record
☒ Use separate resources, and internal values

Create a Record of This Object

* Object:

Set Field Values for the Survey Result

Field	Value
<input type="text" value="Comment__c"/>	<input type="text" value="A_8 Comment X"/>
<input type="text" value="Email__c"/>	<input type="text" value="A_9 Email > Value X"/>
<input type="text" value="Name__c"/>	<input type="text" value="{!Name.firstName} {!Name.lastName}"/>
<input type="text" value="Rating__c"/>	<input type="text" value="A_9 Rating X"/>

[+ Add Field](#)

[Manually assign variables](#)

[Cancel](#) [Done](#)

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

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.

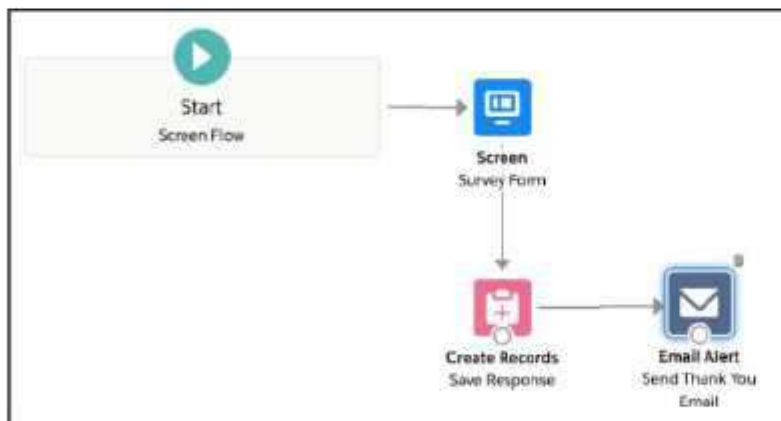
1. Under **Toolbox**, select **Element**.
2. Drag-and-drop **Action** element onto the Flow designer.
3. In the **Action** box, type **Survey – Thank**

You Email.

4. Clicks on the **Survey – Thank You Email** email alert.
5. Click **Done**.

The screenshot shows the 'Edit "Survey - Thank You Email" email alert' configuration window. At the top, it says '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.' Below this, there are two input fields: '* Label' with the value 'Send Thank You Email' and '* API Name' with the value 'Send_Thank_You_Email'. There is also a 'Description' field which is empty. Under the 'Set Input Values' section, there is a field for '* Record ID' with the value '{Save_Response}'. At the bottom right, there are 'Cancel' and 'Done' buttons.

In the end, Sergio's **Flow** will look like the following screenshot:



1. Click **Save**.
2. Enter **Flow Label** the **API Name** will auto-populate.
3. Click **Show Advanced**.
4. **How to Run the Flow: User or 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

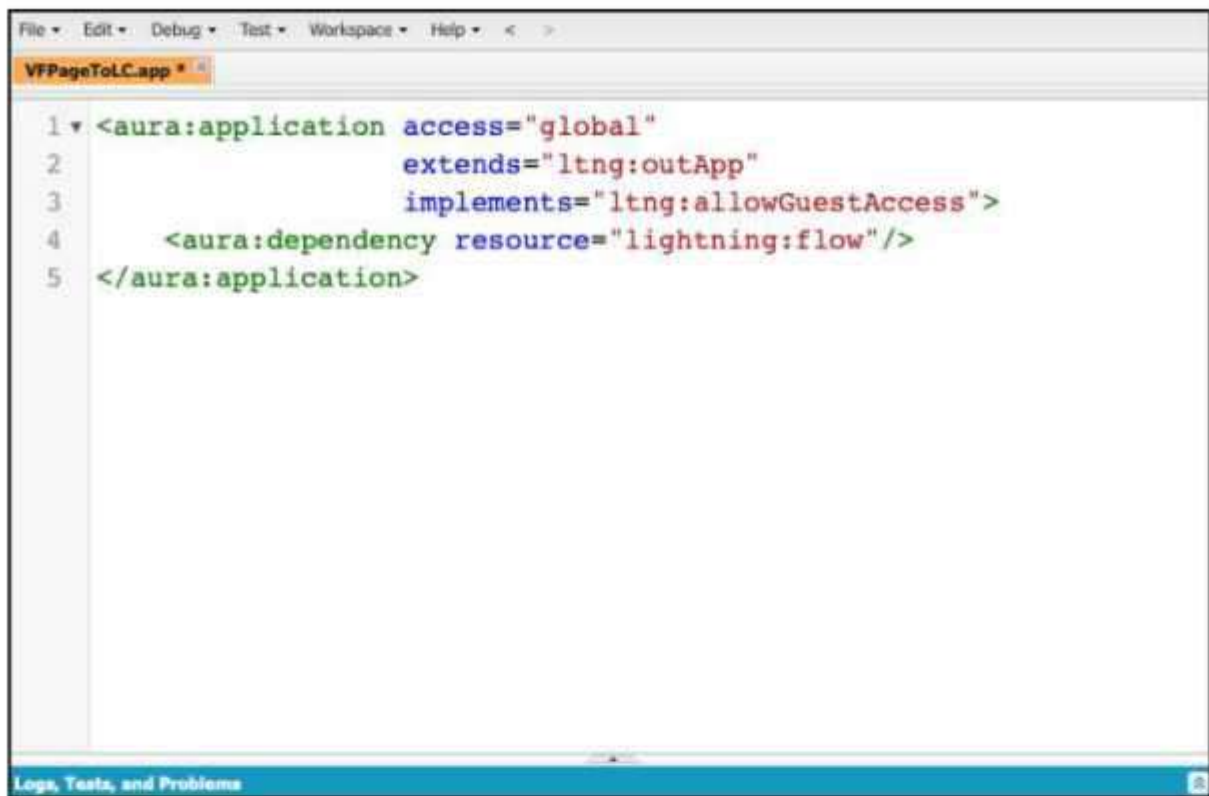
Cancel

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)** 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.



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

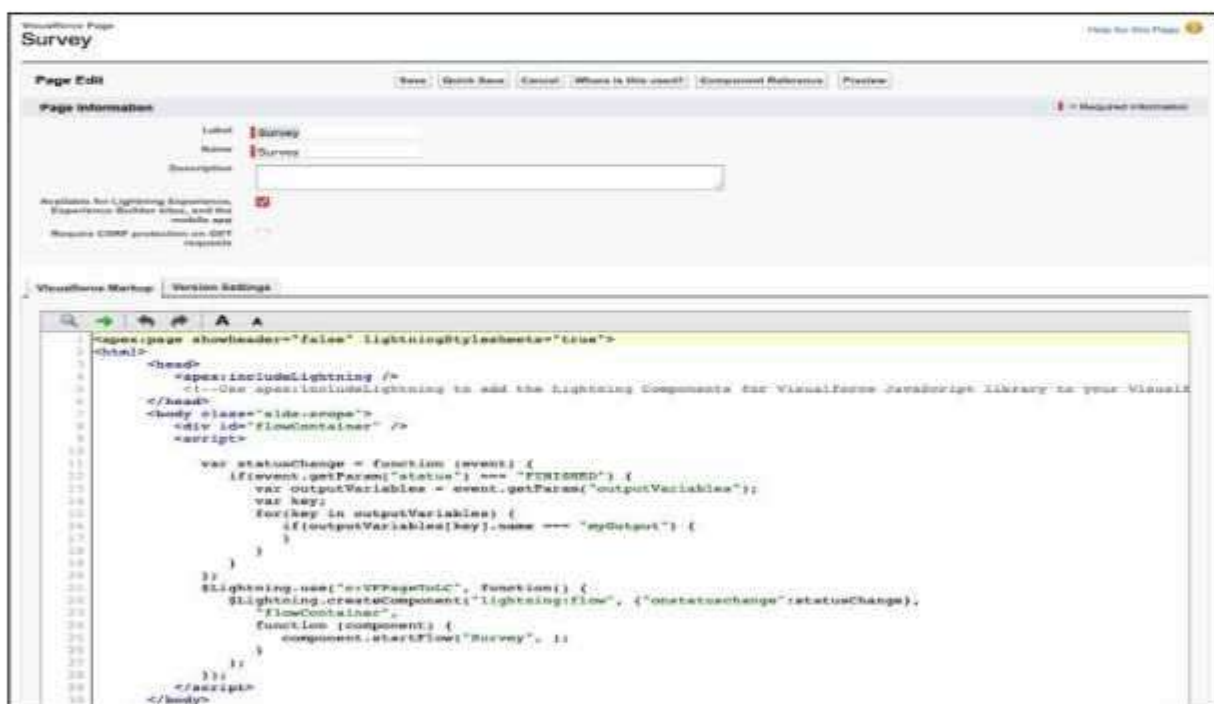
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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
5. Click **Save**.



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: [Empty Text Area]

Site Contact: Rakesh Gupta

Default Record Owner: Rakesh Gupta

Default Web Address: <http://kathas-developer-edition.gus.force.com/> survey

Active: ☒

Active Site Home Page: Survey (Picklist)

Inactive Site Home Page: InMaintenance (Picklist)

Site Template: SiteTemplate (Picklist)

Site Role(s): [Empty Text Area]

Site Favorite Icon: [Empty Text Area]

Analytics Tracking Code: [Empty Text Area]

URL Helper Class: [Empty Text Area]

Enable Fields: [Empty Text Area]

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 **fields**.

Proof of Concept

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

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, when 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