

NAAN MUDHALVAN
Salesforce Developer(Course)
Assignment no 1

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YEAR & DEP : IV YEAR & CSBS

BATCH : 2024

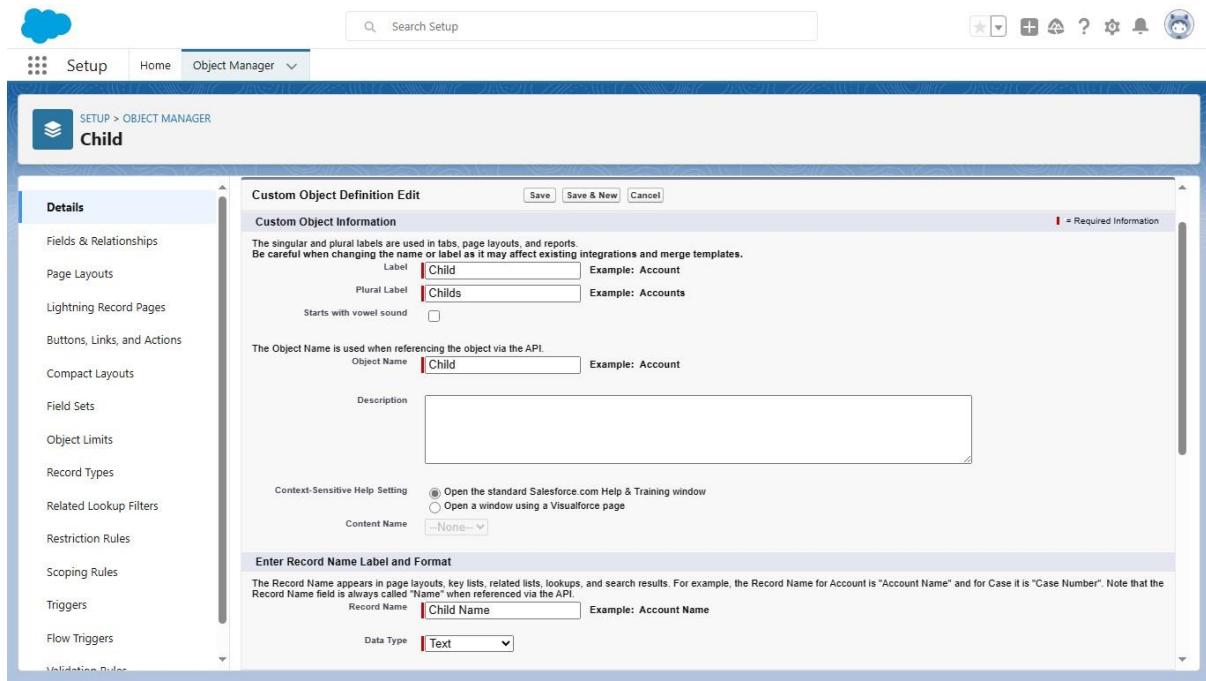
ZONE NO : ZONE 8

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

Step 1: Create Custom Objects.

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

- Header:** SETUP > OBJECT MANAGER
- Object Name:** Parent
- Custom Object Information:**
 - Label: Parent
 - Plural Label: Parents
 - Starts with vowel sound:
 - Object Name: Parent
 - Description: (empty)
 - Context-Sensitive Help Setting:
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
 - Content Name: None
- Details Sidebar:**
 - Fields & Relationships
 - Page Layouts
 - Lightning Record Pages
 - Buttons, Links, and Actions
 - Compact Layouts
 - Field Sets
 - Object Limits
 - Record Types
 - Related Lookup Filters
 - Restriction Rules
 - Scoping Rules
 - Triggers
 - Flow Triggers
 - Validation Rules



Step 2: Create a Master-Detail Relationship

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

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Parent

Details

Fields & Relationships

4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Name	Name	Text(80)		✓

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Parent

Details

Fields & Relationships

New Custom Field

Step 1. Choose the field type

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

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

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

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

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

Help for this Page ?

Step 1

Next Cancel

Cloud icon

Search Setup

Setup Home Object Manager

Parent

SETUP > OBJECT MANAGER

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Parent New Relationship

Step 2. Choose the related object Step 2 of 6

Select the other object to which this object is related.

Related To: Child

Help for this Page

Previous Next Cancel

Previous Next Cancel

Cloud icon

Search Setup

Setup Home Object Manager

Child

SETUP > OBJECT MANAGER

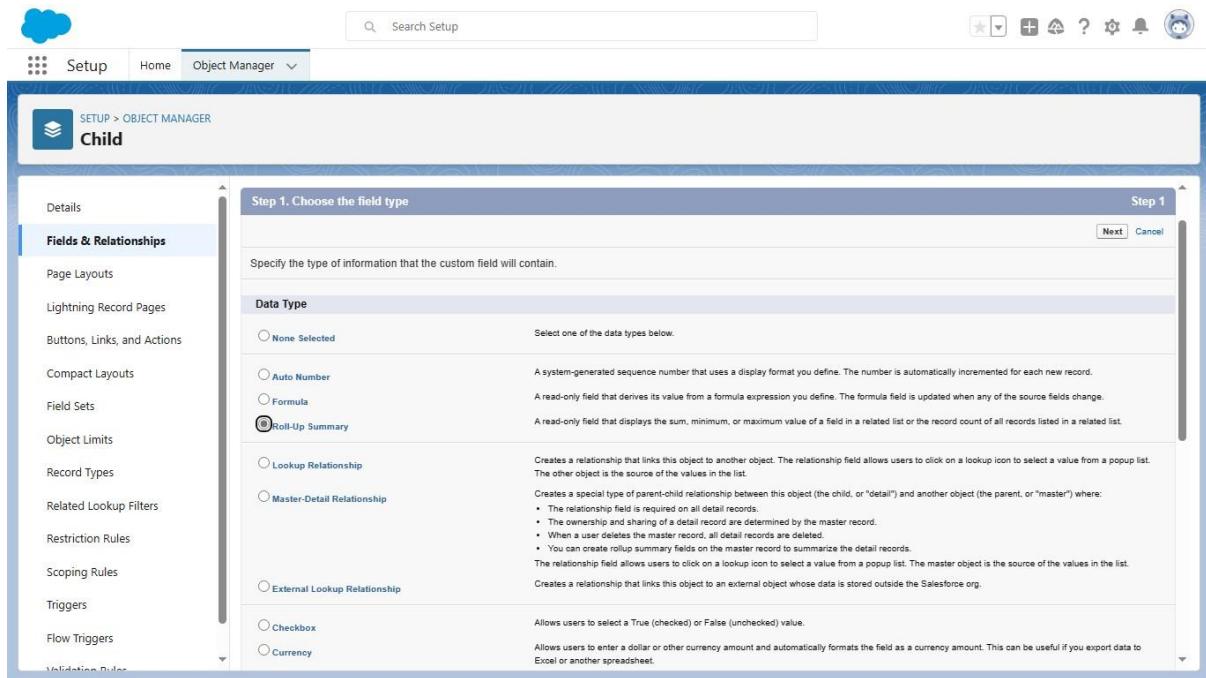
Details

Fields & Relationships

5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Child Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
total child count	total_child_count_c	Roll-Up Summary (COUNT Parent)		

Quick Find New Deleted Fields Field Dependencies Set History Tracking



Step 3: Create a Roll-Up Summary Field

1. In the same "Parent" editing page, scroll down to the "Roll-Up Summary Fields" section.
2. Click "New Roll-Up Summary Field."
3. Choose the "Child" as the child object for which you want to calculate the total.
4. Give your Roll-Up Summary Field a name (e.g., "Total_Child_Records__c").
5. Choose the type of calculation you want (e.g., "COUNT").
6. Configure any additional filter criteria if needed.
7. Save the changes.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has sections for 'User Interface' (Loaded Console Tab Limit, Rename Tabs and Labels) and 'Tabs'. A message at the top says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Object Tabs' and contains a table with four rows:

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

Below this are sections for 'Web Tabs' (No Web Tabs have been defined), 'Visualforce Tabs' (No Visualforce Tabs have been defined), 'Lightning Component Tabs' (No Lightning component tabs have been defined), and 'Lightning Page Tabs' (table with columns Action, Label, Tab Style, Description).

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

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

Lightning Experience App Manager

App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	22/08/2023, 11:15 am	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/08/2023, 11:15 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	22/08/2023, 11:15 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for you...	22/08/2023, 11:17 am	Lightning	✓
5 Community	Community	Salesforce CRM Communities	22/08/2023, 11:15 am	Classic	✓
6 Content	Content	Salesforce CRM Content	22/08/2023, 11:15 am	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and man...	22/08/2023, 11:15 am	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/08/2023, 11:15 am	Lightning	✓
9 Dreamhouse	Dreamhouse		29/08/2023, 4:12 pm	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/08/2023, 11:15 am	Lightning	✓
11 Marketing	Marketing	Best-in-class on-demand marketing automation	22/08/2023, 11:15 am	Classic	✓
12 Platform	Platform	The fundamental Lightning Platform	22/08/2023, 11:15 am	Classic	✓
13 Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2023, 11:15 am	Lightning	✓
14 Sales	Sales	The world's most popular sales force automation (SFA) sol...	22/08/2023, 11:15 am	Classic	✓
15 Sales	LightningSales	Manage your sales process with accounts, leads, opportun...	22/08/2023, 11:15 am	Lightning	✓

New Lightning App

App Details & Branding

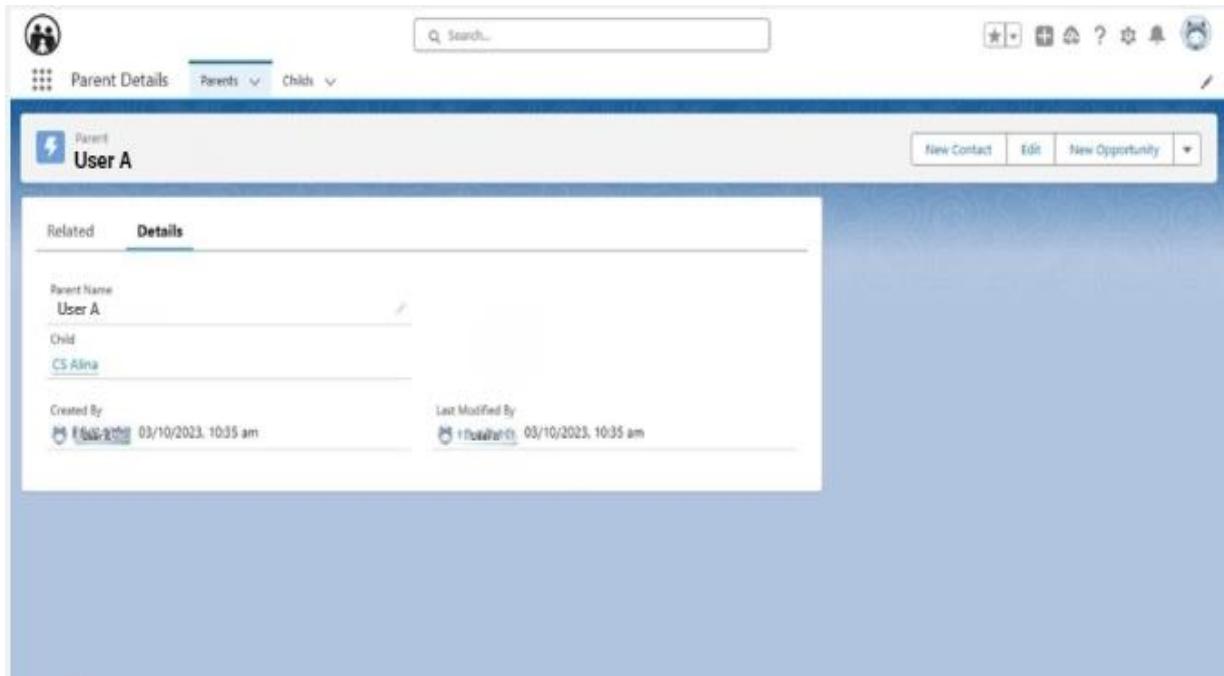
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details	App Branding
*App Name <small>(Required)</small> <input type="text" value="Parent Details"/>	Image <small>(Required)</small> <input type="file" value="Upload"/>
*Developer Name <small>(Required)</small> <input type="text" value="User A"/>	Primary Color Hex Value <small>(Required)</small> <input type="color" value="#007002"/> #007002
Description <small>(Optional)</small> <input type="text" value="Enter a description..."/>	Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme
App Launcher Preview	
<p>0 1 2 3 4 5 6 7 8 9 10</p> <input type="button" value="Next"/>	

Step 5: Test the Relationship and Roll-Up Summary Field

Create some records in both the Parent and Child objects and verify that the Roll-Up Summary Field correctly calculates the total number of related Child records on the Parent record.

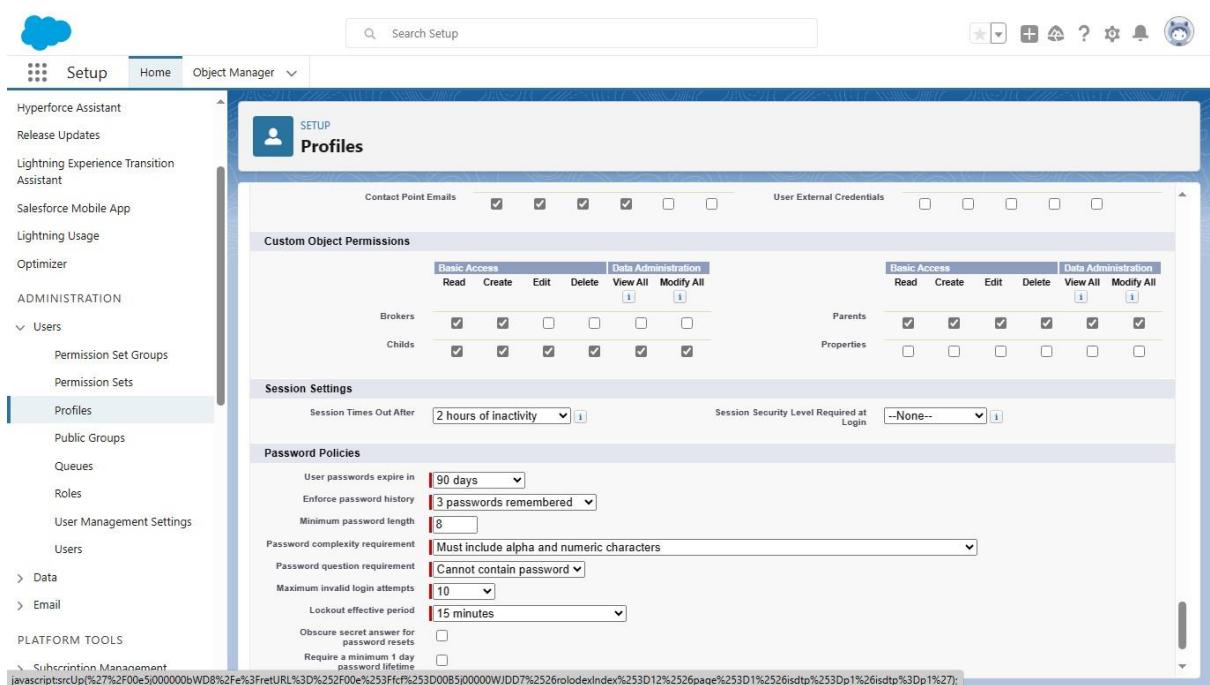
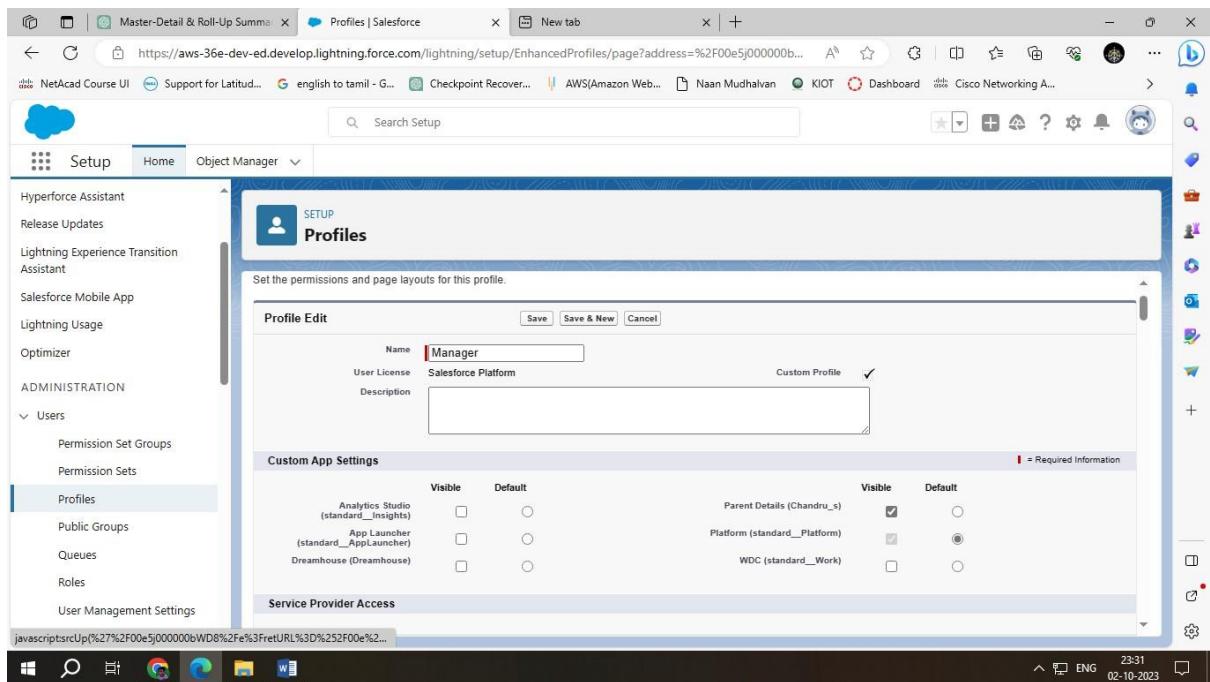
That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



2.If there 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 th Security for the users.

Step 1: Create a Public Group

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



Step 2: Create Criteria-Based Sharing Rules

For User A1. Go to "Setup" in Salesforce.

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

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

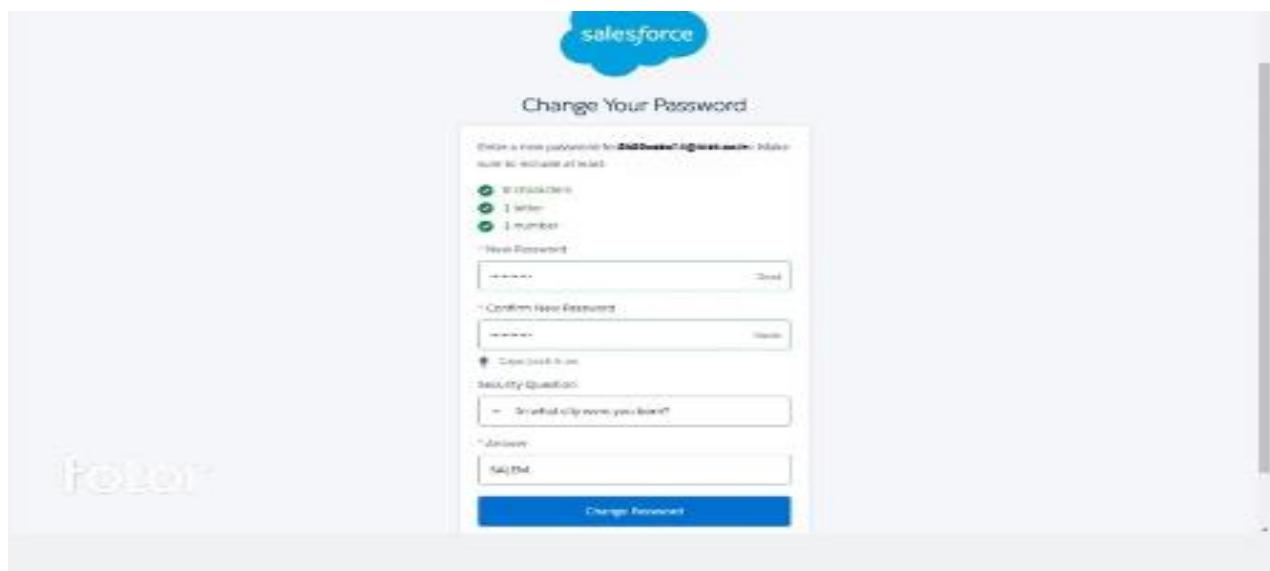
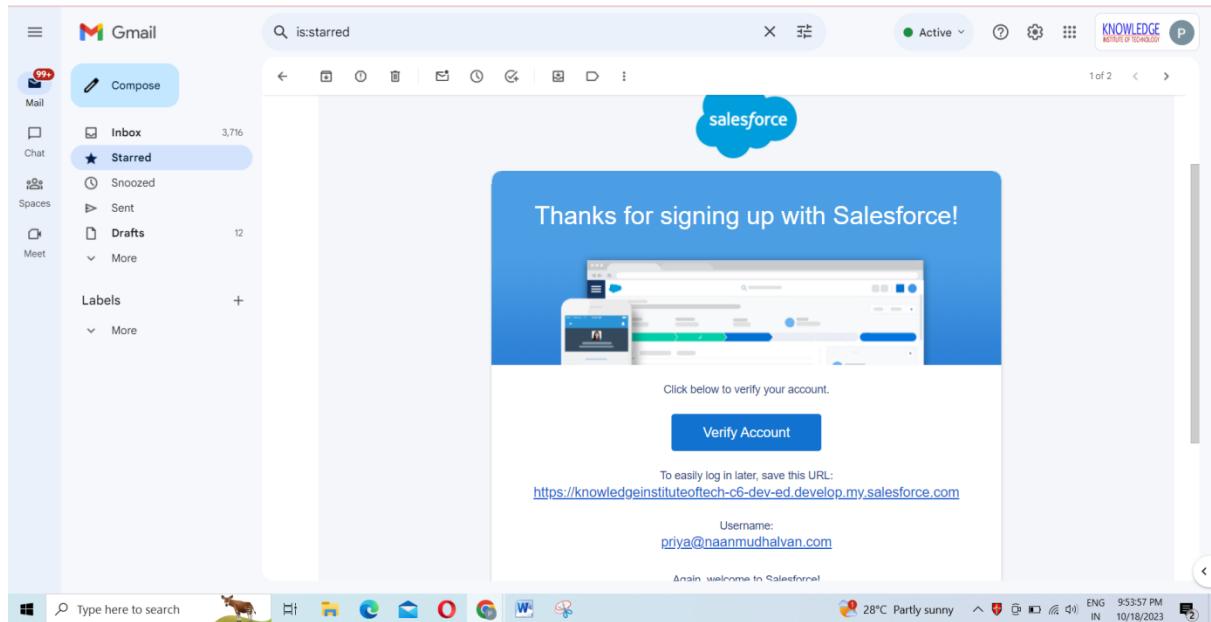
4. Create a rule that shares records owned by members of "UserB_Group" with the "UserA_Group."

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

6. Save the sharing rule.

This screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is visible with sections like Administration, Data, Email, and Platform Tools. The main content area is titled 'User Edit' for a user named 'PRIYADHARSHINI P'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. To the right of these fields is a 'Role' dropdown set to '<None Specified>' and a 'User License' dropdown set to 'Salesforce'. A large list of checkboxes for various user types (Marketing User, Offline User, Knowledge User, etc.) is present, with several checked. At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'.

This screenshot shows the 'User Detail' screen for the same user 'PRIYADHARSHINI P'. The left sidebar remains the same. The main content area shows detailed information about the user, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password Authenticator, Role, User License, Profile, Active status, and various checkboxes for user types. The 'Sharing' tab is selected at the top of the detail screen.



Profile Edit

Bmanager

Name: Bmanager
User License: Salesforce Platform
Description:

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Parent Details (Chandru_s)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Dreamhouse (Dreamhouse)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home Default On Learning Default On

Custom Object Permissions

	Basic Access						Data Administration						
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Brokers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Parents	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
Childs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Properties	<input checked="" type="checkbox"/>	<input type="checkbox"/>								

Session Settings

Session Times Out After: 2 hours of inactivity
Session Security Level Required at Login: None

Password Policies

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

For User B:

1. Follow the same steps as above but create a separate sharing rule for User B.

2. This rule should share records owned by members of "UserA_Group" with the "UserB_Group."

3. Define the criteria based on which records should be shared.

4. Save the sharing rule.

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup' (selected), 'Home', and 'Object Manager'. Under 'ADMINISTRATION', 'Users' is expanded, showing 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users' (selected). Other sections like 'Data', 'Email', and 'Platform Tools' are also listed. The main content area displays the 'User Edit' screen for a user named 'PRIYADHARSHINI P'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. To the right, there are sections for 'Role' (set to '<None Specified>'), 'User License' (set to 'Salesforce'), 'Profile' (set to 'System Administrator'), and various user status checkboxes (Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User). Below these are dropdowns for 'Data.com User Type' (set to '-None-') and 'Data.com Monthly Addition Limit' (set to '300'). At the bottom, there are buttons for 'Save' and 'Cancel'.

Step 3: Assign Records Ownership

The screenshot shows the Salesforce Setup interface. The left sidebar has 'Setup' selected, along with 'Home' and 'Object Manager'. Under 'ADMINISTRATION', 'Users' is expanded, showing 'Permission Set Groups', 'Permission Sets' (selected), 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. Other sections like 'Data', 'Email', and 'Platform Tools' are also listed. The main content area shows the 'Permission Set Create' screen. It starts with 'Enter permission set information' where 'Label' is set to 'permission' and 'API Name' is also set to 'permission'. There is a 'Description' field and a 'Session Activation Required' checkbox. Below this, it asks 'Select the type of users who will use this permission set' with a note about choosing a license. It also asks 'Not sure what a permission set license is? Learn more here.' and provides a dropdown for 'License' (set to '-None-'). At the bottom, there are 'Save' and 'Cancel' buttons.

Permission Set
permission

Object Settings

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

Permission Set
permission

Childs

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

Object Permissions

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

Field Permissions

Field Name	Read Access	Edit Access
Child Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Home, Object Manager, and various administrative tools. Under "Users", "Permission Sets" is selected. The main content area is titled "Permission Sets" and contains a table of existing permission sets. The table columns are Action, Permission Set Label, Description, and License. The table lists several permission sets, including "Buyer", "Buyer Manager", "C360 High Scale Flow Integration User", "CRM User", "Commerce Admin", and "Contact Center Admin".

Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see products ...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to ...	B2B Buyer Manager Permission Set One Seat
Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to ...	Cloud Integration User
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cl...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that us...	Service Cloud Voice User

The screenshot shows the "Create New View" page for Permission Sets in the Salesforce Setup interface. The left sidebar is identical to the previous screenshot. The main content area has a heading "Selected Users" and a table showing two users: "Priyadharshini P" and "Priyadharshini P". The table columns are Full Name, Role, Profile, Active, User License, and Expires On. Both users are listed with "chan" as the profile, "Active" checked, "Salesforce Platform" as the user license, and "Never Expires" as the expiration date. There are also options to set an expiration date and select a time zone.

Full Name	Role	Profile	Active	User License	Expires On
Priyadharshini P		chan	✓	Salesforce Platform	Never Expires
Priyadharshini P		chan	✓	Salesforce Platform	Never Expires

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), Data, Email, Platform Tools, and Subscription Management. The main content area displays a success message: "... > PERMISSIONS > permission" with "1 assignments were successful." Below this is the "Assignment Summary" table:

Full Name	User License	Expires On	Time Zone	Status
Priyadarshini P	Salesforce Platform			Success

A blue "Done" button is located at the bottom right of the table.

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), Data, Email, Platform Tools, and Subscription Management. The main content area displays the "Permission Sets" list:

Operating Hours Holidays	No Access	/	--
Opportunities	No Access	26	--
Opportunity_Contact_Role	--	6	--
Opportunity_Product	--	14	--
Order_Products	--	15	--
Orders	No Access	33	--
Parents	No Access	4	--
Party_Contracts	No Access	18	--
Payment_Authorization_Adjustments	No Access	24	--
Payment_Authorizations	No Access	30	--
Payment_Gateway_Logs	No Access	--	--
Payment_Gateways	No Access	6	--
Payment_Groups	No Access	1	--
Payment_Line_Invoices	No Access	20	--
Payments	No Access	41	--
Pending_Order_Summaries	No Access	--	--
Pending_Order_Summary_Processed_Events	No Access	--	--
Price_Book_Entry	--	9	--
Price_Books	No Access	6	--
Privacy_Contracts	No Access	--	--
Problem_Related_Items	--	10	--
Problems	No Access	21	--
Process_Cart_Pricing_Events	No Access	--	--
Process_Cart_Pricing_Response_Events	No Access	--	--
Process_Exceptions	No Access	12	--
Product_Attributes	--	3	--
Product_Attribute_Set_Products	--	2	--

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

- Left Sidebar:** Includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets), Data, Email, and Platform Tools (Subscription Management).
- Header:** Shows "SETUP" and "Permission Sets".
- Content Area:** Displays the "Permission Set permission" configuration screen. It includes sections for "Tab Settings" (Available: Child, Visible: Child), "Object Permissions" (Read, Create, Edit, Delete, View All, Modify All), and "Field Permissions" (Child, Read Access, Edit Access). Buttons for "Save" and "Cancel" are at the top right.

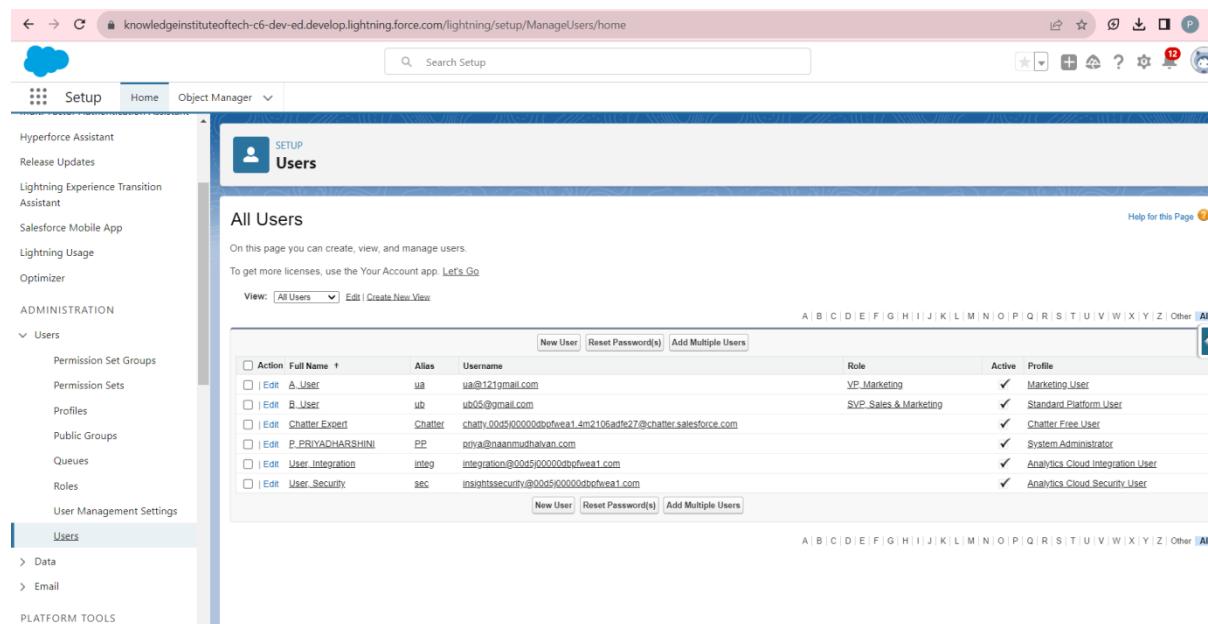
The screenshot shows the Salesforce Setup interface with the following details:

- Left Sidebar:** Same as the first screenshot, including links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets), Data, Email, and Platform Tools (Subscription Management).
- Header:** Shows "SETUP" and "permission".
- Content Area:** Displays a green success message: "... > PERMISSION S 1 assignments were successful." Below it is the "Assignment Summary" table, which shows one assignment for "Sunil A" with "Salesforce Platform" as the User License, "Success" as the Status, and no specific expiration date or time zone listed. A "Done" button is at the bottom right.

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

Step 1: Create a Permission Set for Delete Access

- 1. Go to "Setup" in Salesforce.**
- 2. In the Quick Find box, type "Permission Sets" and select it.**
- 3. Click "New Permission Set" to create a new one.**
- 4. Give the permission set a name (e.g., "Delete Access Permission Set").**
- 5. In the "System Permissions" section, find and enable the "Delete" permission for the "Account" object.**
- 6. Save the permission set.**



The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The left sidebar shows navigation options like Home, Object Manager, and various Admin sections. The main area displays a list of users under the heading 'All Users'. The table includes columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The 'Active' column contains checkmarks for most users, except for one which is crossed out. The 'Profile' column lists profiles such as Marketing User, Standard Platform User, Chatter Free User, System Administrator, Analytics Cloud Integration User, and Analytics Cloud Security User. At the bottom of the table, there are buttons for New User, Reset Password(s), and Add Multiple Users.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A_User	ua	ua@t21mail.com	VP_Marketing	✓	Marketing User
<input type="checkbox"/>	B_User	ub	ub05@mail.com	SVP_Sales & Marketing	✓	Standard Platform User
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty.0005 00000pbvfeat14m2106adfe27@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	P_PRIYACHARSHINI	PP	ppva@nannudhabavan.com		✓	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00d5 00000pbvfeat1.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d5 00000pbvfeat1.com		✓	Analytics Cloud Security User

Cloud icon

Setup Home Object Manager

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

> Data

> Email

PLATFORM TOOLS

- Subscription Management
- Apps
- Feature Settings
- Slack
- MuleSoft
- Einstein

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

SETUP Profiles

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Edit Clone	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Analytics Cloud Security User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ...	Bmanager	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Chatter External User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Chatter Free User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Chatter Moderator User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Contract Manager	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Cross Org Data Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ...	Custom Marketing Profile	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ...	Custom Sales Profile	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ...	Custom Support Profile	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Customer Community Login User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Customer Community Plus Login User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Customer Community Plus User	<input type="checkbox"/>

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | All

1-25 of 41 | 0 Selected | Page 1 of 2

Cloud icon

Setup Home Object Manager

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

> Data

> Email

PLATFORM TOOLS

- Subscription Management
- Apps
- Feature Settings
- Slack
- MuleSoft
- Einstein

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. * Required Information

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	Manager

Save Cancel

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Setup Home, Service Setup Assistant, Commerce Setup Center, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. The main content area is titled 'SETUP Profiles' and shows the 'PRIYA' profile details. The profile has a Name of 'PRIYA', User License of 'Salesforce', and was Created By 'PRIYADHARSHINI.P' on 19/10/2023, 11:09 am. It also lists various permissions and access levels.

The screenshot shows the Salesforce Setup interface with a search bar containing 'user'. The left sidebar is expanded, showing sections like Permission Set Groups, Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, Users (selected), Feature Settings, Data.com, Prospector Users, and Service. The main content area is titled 'SETUP Profiles' and shows the 'Page Layouts' section for the 'Profiles' category. It displays a table of standard object layouts, including Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, Asset Relationship, and Assigned Resource layouts, along with their corresponding global layouts and object milestones.

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, there's a sidebar with links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users). The main content area is titled "SETUP Profiles". It contains several tabs: "Basic Access", "Data Administration", "Session Settings", and "Password Policies". Under "Basic Access", there are sections for "Brokers" and "Children". Under "Data Administration", there are sections for "Parents" and "Properties". In "Session Settings", you can set "Session Times Out After" to "2 hours of inactivity" and "Session Security Level Required at Login" to "-None-". In "Password Policies", you can set "User passwords expire in" to "90 days", "Enforce password history" to "3 passwords remembered", "Minimum password length" to "8", and "Password complexity requirement" to "Must include alpha and numeric characters". Other settings include "Password question requirement" (set to "Cannot contain password"), "Maximum invalid login attempts" (set to "10"), "Lockout effective period" (set to "15 minutes"), "Obscure secret answer for password resets" (unchecked), "Require a minimum 1 day password lifetime" (unchecked), and "Don't immediately expire links in forgot password emails" (unchecked). At the bottom are "Save", "Save & New", and "Cancel" buttons.

The screenshot shows the Salesforce Setup interface under the Profiles section, specifically the "Profile Edit" page for the "PRIYA" profile. The sidebar is identical to the previous screenshot. The main content area is titled "Profile Edit PRIYA". It has a "Custom Profile" checkbox checked. Below it is a "Custom App Settings" table. The table has two columns of checkboxes for "Visible" and "Default" status. The rows are: All Tabs (standard__AllTabSet) (Visible checked, Default radio button selected), Analytics Studio (standard__Insights) (Visible checked, Default radio button selected), App Launcher (standard__AppLauncher) (Visible checked, Default radio button selected), Bolt Solutions (standard__LightningBolt) (Visible checked, Default radio button selected), Sales (standard__LightningSales) (Visible checked, Default radio button selected), Sales (standard__Sales) (Visible radio button selected, Default checked), Sales Console (standard__LightningSalesConsole) (Visible checked, Default radio button selected), and Salesforce Chatter (standard__Chatter) (Visible checked, Default radio button selected). A note at the top right says "Help for this Page".

knowledgeinstituteoftech-c6-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A_User	ua	ua@121@gmail.com	VP_Marketing	<input checked="" type="checkbox"/>	Marketing User
<input type="checkbox"/>	B_User	ub	ub05@gmail.com	SVP_Sales & Marketing	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Charter Expert	Chatter	chatty.0005j000000tgfwet1.4m2106adfe27@chatter.salesforce.com		<input checked="" type="checkbox"/>	Charter Free User
<input type="checkbox"/>	P_PRIYADHARSHINI	pp	prya@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@0005j000000tbydfweat1.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@0005j000000bpfwea1.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

knowledgeinstituteoftech-c6-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005j00000AR7fx%2Fe%3FisUserEntityOverride%3D1%26retURL%3D%252...

The screenshot shows the Salesforce Lightning Experience setup interface. The left sidebar is titled "Setup" and includes sections for "Salesforce Mobile App", "Lightning Usage", "Optimizer", "ADMINISTRATION", "Users", "Permission Set Groups", "Permission Sets", "Profiles", "Public Groups", "Queues", "Roles", "User Management Settings", and "Users". The "Users" section is currently selected. The main content area is titled "User PRIYADARSHINI P" and displays the "User Detail" page. The user's name is listed as "PRIYADARSHINI P" with an alias "PP". The email address is "2k20csbs31@kiot.ac.in [Verified]". The user is active and assigned to the "System Administrator" profile. Other roles listed include "Marketing User" and "Service Cloud User". The "Sharing" tab is selected at the top of the detail page.

The screenshot shows the "User Edit" page for the same user, "PRIYADARSHINI P". The left sidebar is identical to the previous screenshot. The main content area is titled "User Edit PRIYADARSHINI P". The "General Information" section contains fields for First Name ("PRIYADARSHINI"), Last Name ("P"), Alias ("PP"), Email ("2k20csbs31@kiot.ac.in"), Username ("priya@naanmudhalvan.com"), Nickname ("User169630937262643184"), Title (empty), Company ("KNOWLEDGE INSTITUTE"), Department (empty), and Division (empty). The "Role" dropdown is set to "<None Specified>". The "Profile" is set to "System Administrator". The "Active" checkbox is checked. Other checkboxes for "Marketing User", "Offline User", and "Service Cloud User" are also checked. The "Data.com User Type" dropdown is set to "-None-". The "Data.com Monthly Addition Limit" is set to 300. The "Help for this Page" link is visible at the top right of the edit page.

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar includes sections for User Management Settings, such as Permission Set Groups, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area displays a table titled 'Admin Users' with one row selected for editing. The selected row shows a user named 'PP' with the email 'ppya@naanmuohalyan.com' and the role 'System Administrator'. Navigation links at the bottom include 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Step 2: Assign the Permission Set to the User Needing Delete Access

1. In the "Permission Set Detail" page, click on "Manage Assignments."
2. Click "Add Assignments" and select the user who needs delete access.
3. Save the assignment.

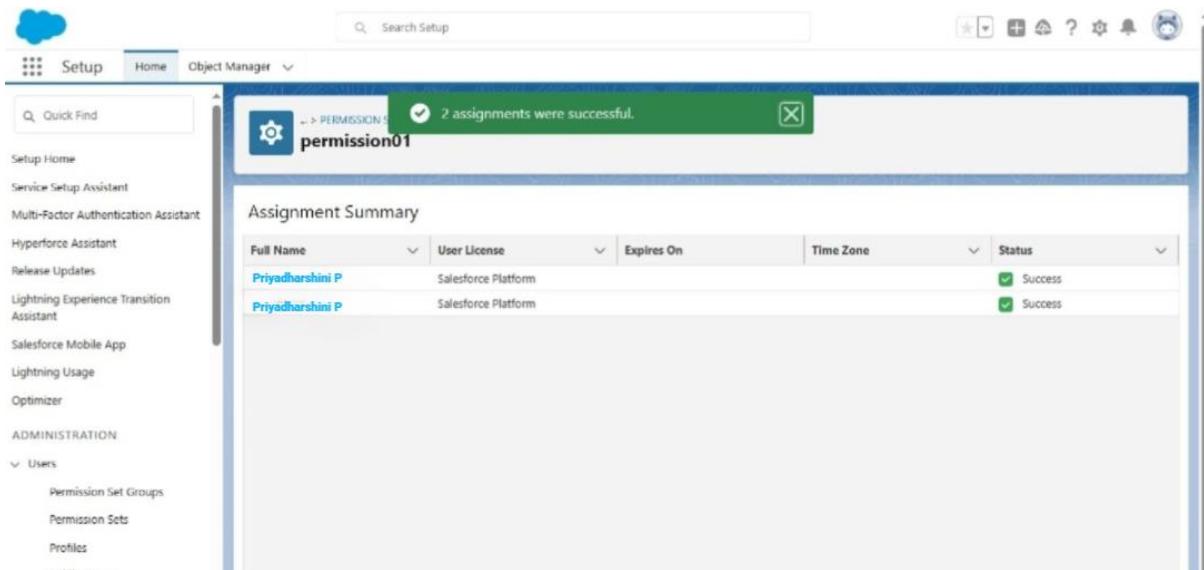
The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. The left sidebar includes sections for Administration, such as Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and User Management Settings. The main content area displays a table titled 'Permission Sets' with a list of various permission sets like 'Buyer', 'CRM User', 'Commerce Admin', etc., each with a brief description and license information. Navigation links at the bottom include 'New', 'Edit', 'Delete', and 'Create New View'.

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Permission Sets' and displays a permission set named 'permission01'. A modal window titled 'Edit Properties' is open, showing fields for 'Label' (set to 'permission01'), 'API Name' (set to 'permission01'), and 'Description'. Below the modal, sections for 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', and 'External Data Source Access' are visible.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the first screenshot. The main content area is titled 'Permission Sets' and displays the same 'permission01' permission set. The 'Accounts' tab is selected under 'Object Settings'. The 'Object Permissions' section shows checkboxes for various account-related permissions: Read, Create, Edit, Delete, View All, and Modify All. The 'Field Permissions' section lists account fields with 'Read Access' and 'Edit Access' checkboxes: Account Name, Account Number, Account Owner, Account Site, Account Source, Active, and Annual Revenue. Most fields have both 'Read' and 'Edit' checkboxes checked.

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. Under ADMINISTRATION, the 'Permission Set Groups' section is expanded, showing 'Permission Sets' (selected), 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area displays the 'Permission Sets' page for 'permission01'. It shows tabs for 'Object Settings' (selected) and 'Accounts'. Under 'Object Permissions', there is a table for 'Accounts' with columns for 'Permission Name' (Read, Create, Edit, Delete, View All, Modify All) and 'Enabled' status. Under 'Field Permissions', there is a table for 'Account' with columns for 'Field Name' (Account Name, Account Number, Account Owner, Account Site, Account Source, Active, Annual Revenue), 'Read Access', and 'Edit Access'. A 'Video Tutorial | Help for this Page' link is at the top right.

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. Under ADMINISTRATION, the 'Permission Set Groups' section is expanded, showing 'Permission Sets' (selected), 'Profiles' (selected), 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area displays the 'Profiles' page. It shows two sections: 'No expiration date' (selected) and 'Specify the expiration date' (radio button). Under 'Specify the expiration date', there are buttons for '1 Day', '1 Week', '30 Days', '60 Days', and 'Custom Date', and a dropdown for 'Select a time zone...'. Below these, the 'Selected Users' table lists two users: 'Priyadarshini P' and 'Priyadarshini P'. The columns are: Full Name, Role, Profile, Active, User License, and Expires On. Both users have 'chan' as their profile, 'Active' checked, 'Salesforce Platform' as their user license, and 'Never Expires' as their expiration date.



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

Step 1: Create a custom object

1.Click Setup.

2.In the Object Manager, click Create | Custom Object.

3.Now create a custom object Survey Result and fields as shown in the screenshot below:

4. Click Save.



SETUP > OBJECT MANAGER
Survey Result

Details	Fields & Relationships				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Comment	Comment__c	Text Area(255)		▼
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Email	Email__c	Email		▼
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Name	Name__c	Text(51)		▼
Object Limits	Owner	OwnerId	Lookup(User,Group)	✓	
Record Types	Rating	Rating__c	Picklist		▼
Related Lookup Filters					
Search Layouts	Survey Result Name	Name	Auto Number	✓	▼
Search Layouts for Salesforce Classic					
Triggers					
Validation Rules					

Step 2: Create a Thank You For Survey Lightning Email Template

- 1.Click App Launcher.
- 2.In the Quick Find box, type Email Templates.
- 3.Clicks on the New Email template button.
- 4.Name the Lightning Email Template and make sure to store it in the Public Email Templates folder.
- 5.Create a template like the following screenshot

Email Template
Thank You Email - Survey

Details Related

Information

Email Template Name Thank You Email - Survey	Related Entity Type Survey Result
Description	Folder Public Email Templates
Made in Email Template Builder <input checked="" type="checkbox"/>	

Message Content

Subject Thank You For Completing Our Survey!	Enhanced Letterhead
HTML Value	<p>Hi {{Survey_Result__c.Name__c}},</p> <p>Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>

Additional Information

Created By Rakesh Gupta, 12/21/2020, 4:23 PM	Last Modified By Rakesh Gupta, 12/21/2020, 4:32 PM
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Step 3: Create an Email Alert

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

8.Click Save.

Survey - Thank You Email

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for:

Recipients:

Available Recipients	Selected Recipients
User: Integration User User: Rakesh Gupta User: Security User	Email Field: Email

Add Remove

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

Additional Emails

From Email Address: Current User's email address

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

Save Save & New Cancel

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

- 1.Click Setup.
- 2.In the Quick Find box, type Flows.
- 3.Select Flows then click on the New Flow.
- 4.Select the Screen Flow option and click on Next and configure the flow as follows:
- 5.How do you want to start building: Freeform
- 6.We will use the Screen element to capture a Survey response form. Drag and drop a Screen element onto the canvas.

Step 4.2: Salesforce Flow – Add a Record Creates Element to Save Survey Response

- 1.Drag-and-drop the Create Records element onto the Flow designer.
- 2.Enter a name in the Label (Save Response) field; the API Name will auto-populate.
- 3.For How Many Records to Create – select One.
- 4.For How to Set the Record Fields – select Use separate resources, and literal values.
- 5.Select the Survey_Result__c object from the dropdown list.
- 6.Set Field Values for the Survey Result

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row3:

Field: Name__c

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

Click Add Row

Row 3:

Field: Rating__c

Value: {!Rating}

7.Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

*Label <input type="text" value="Save Response"/>	*API Name <input type="text" value="Save_Response"/>
Description <input type="text"/>	
How Many Records to Create <input checked="" type="radio"/> One <input type="radio"/> Multiple	
How to Set the Record Fields <input type="radio"/> Use all values from a record <input checked="" type="radio"/> Use separate resources, and literal values	
Create a Record of This Object	
*Object <input type="text" value="Survey Result"/>	
Set Field Values for the Survey Result	
Field <input type="text" value="Comment__c"/>	Value <input type="text" value="A_a Comment X"/>
Field <input type="text" value="Email__c"/>	Value <input type="text" value="A_a Email > Value X"/>
Field <input type="text" value="Name__c"/>	Value <input type="text" value="={!Name.firstName} {!Name.lastName}"/>
Field <input type="text" value="Rating__c"/>	Value <input type="text" value="A_a Rating X"/>
<input type="button" value="+ Add Field"/>	
<input type="checkbox"/> Manually assign variables	
<input type="button" value="Cancel"/> <input type="button" value="Done"/>	

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

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

4.Clicks on the Survey – Thank You Email email alert.

5.Click Done.

Edit "Survey - Thank You Email" email alert

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

* Label	* API Name
Send Thank You Email	Send_Thank_You_Email
Description	
<input type="text"/>	

Set Input Values

A3 * Record ID

{!Save_Response}

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.

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

VFPageToLC.app *

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

Logs, Tests, and Problems

```

1 <apex:page showheader="false" lightningStylesheets="true">
2 <html>
3   <head>
4     <apex:includeLightning />
5     <!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualf
6   </head>
7   <body class="slds-scope">
8     <div id="flowContainer" />
9     <script>
10
11       var statusChange = function (event) {
12         if(event.getParam("status") === "FINISHED") {
13           var outputVariables = event.getParam("outputVariables");
14           var key;
15           for(key in outputVariables) {
16             if(outputVariables[key].name === "myOutput") {
17               ...
18             }
19           }
20         };
21         $Lightning.use("c:VFPPageToLC", function() {
22           $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
23             "flowContainer",
24             function (component) {
25               component.startFlow("Survey", );
26             }
27           );
28         });
29       </script>
30     </body>

```

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

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

- 1.Click Setup.
- 2.In the Quick Find box, type Sites.
- 3.Clicks on the New button.
- 4.Fill the details as per the screenshot below:
- 5.Click Save.

Site Edit

Save **Cancel**

Site Label <input type="text" value="Survey"/> 	Site Name <input type="text" value="Survey"/> 
Site Description <div style="border: 1px solid black; height: 100px; width: 100%;"></div>	
Site Contact <input type="text" value="Rakesh Gupta"/>  	
Default Record Owner <input type="text" value="Rakesh Gupta"/>  	
Default Web Address <input type="text" value="http://katihar-developer-edition.gus.force.com/ survey"/> 	
Active <input checked="" type="checkbox"/> 	
Active Site Home Page <input type="text" value="Survey"/>  	
Inactive Site Home Page <input type="text" value="InMaintenance"/>  	
Site Template <input type="text" value="SiteTemplate"/>  	
Site Robots.txt <input type="text"/> 	
Site Favorite Icon <input type="text"/> 	
Analytics Tracking Code <input type="text"/> 	
URL Rewriter Class <input type="text"/>  	
Enable Feeds <input type="checkbox"/>	
Clickjack Protection Level <input type="text" value="Allow framing by the same origin only (Recommended)"/>  	
Require Secure Connections (HTTPS) <input checked="" type="checkbox"/> 	
Lightning Features for Guest Users <input checked="" type="checkbox"/> 	
Upgrade all requests to HTTPS <input checked="" type="checkbox"/> 	
Enable Content Sniffing Protection <input checked="" type="checkbox"/> 	
Enable Browser Cross Site Scripting Protection <input checked="" type="checkbox"/> 	
Referrer URL Protection <input checked="" type="checkbox"/> 	
Guest Access to the Payments API <input type="checkbox"/> 	

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

Proof of Concept

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

Survey

Name

First Name

Alok

Last Name

Sinfal

*Email

[REDACTED]

*Rating

5

*Comment

Awesome Blog



Next



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

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row 3:

Field: Name__c

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

Click Add Row

Row 3:

Field: Rating__c

Value: {!Rating}

Click Done.