

NAAN MUDHALVAN
Salesforce Developer(Course)
Assignment no 1

NAME : SHAMYUKTHA P

NAAN MUDHALVAN ID : AU611220244036

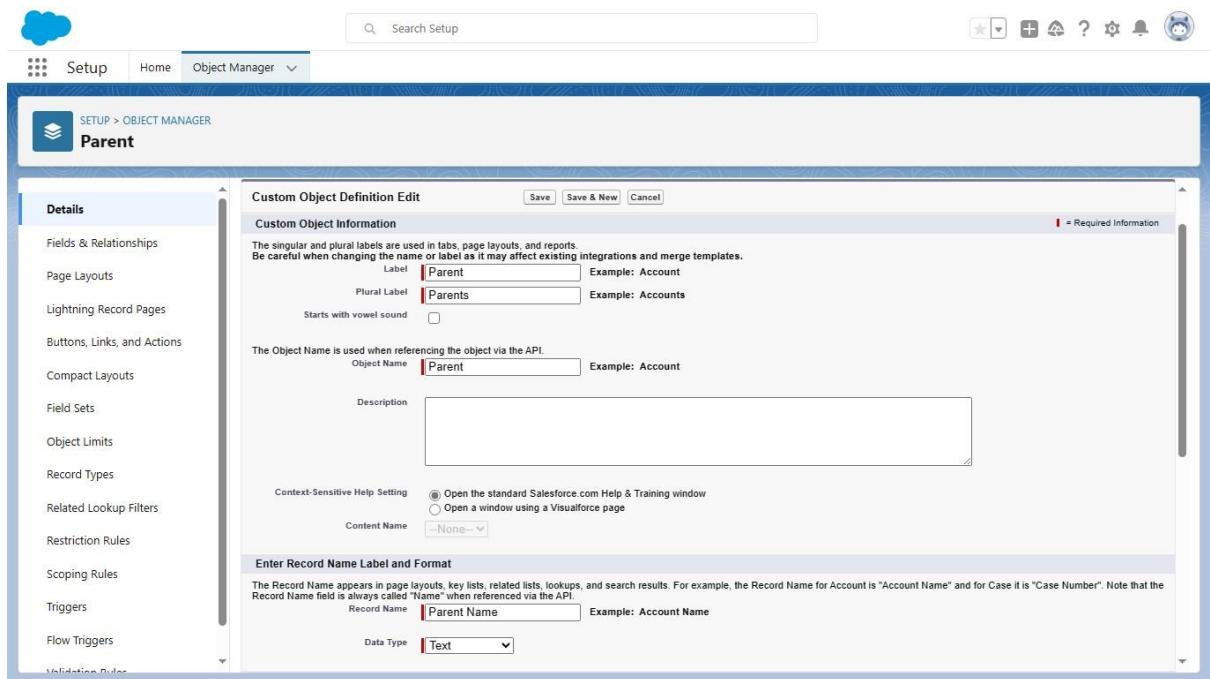
YEAR & DEP : IV YEAR & CSBS

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:

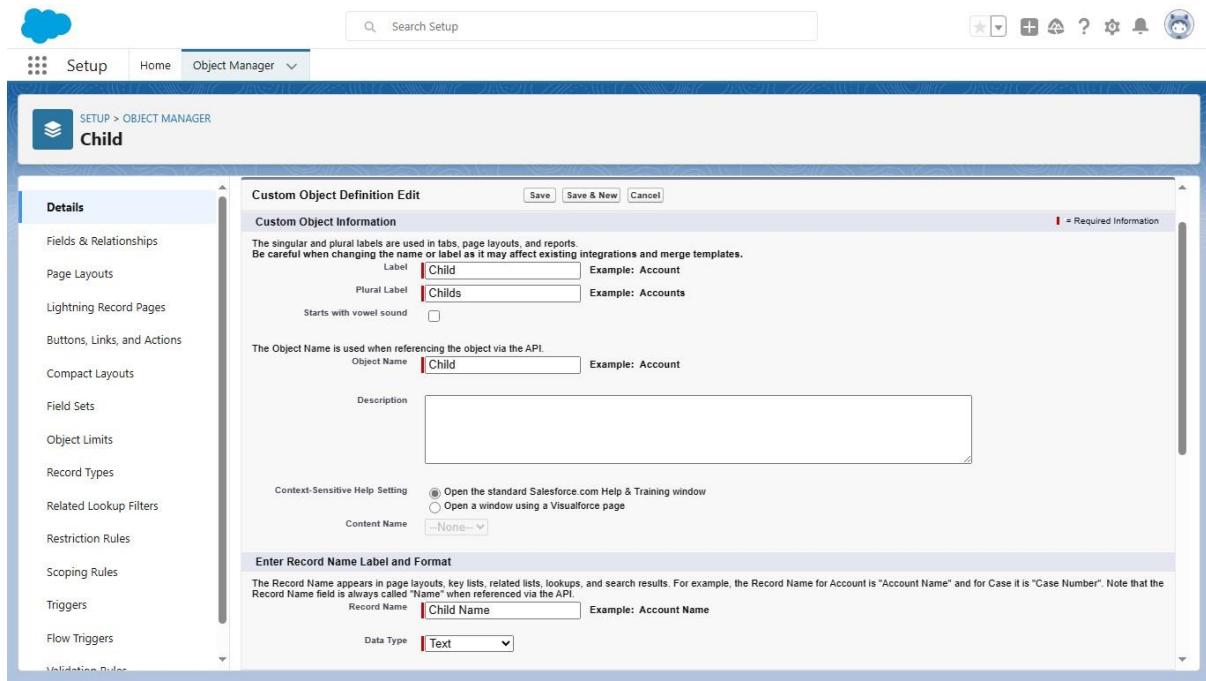
Step 1: Create Custom Objects.



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

- Custom Object Information:** Label: Parent, Plural Label: Parents.
- Object Name:** Object Name: Parent, Example: Account.
- Description:** A large text area for entering a description, currently empty.
- Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (radio button selected).
- Content Name:** None.
- Enter Record Name Label and Format:** Record Name: Parent Name, Example: Account Name. Data Type: Text.

The left sidebar lists various object configuration options: 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, and 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

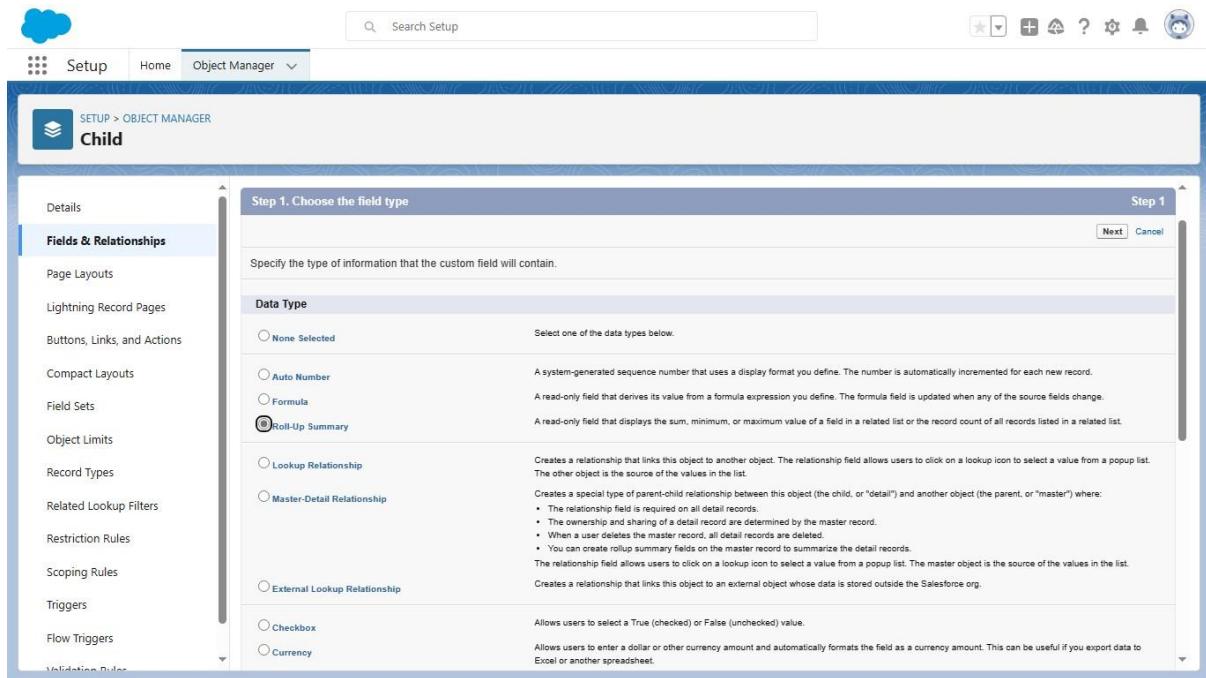
Details

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 columns for Action, Label, Tab Style, and Description. It lists four tabs: 'Brokers' (People), 'Childs' (Lightning), 'Parents' (Lightning), and 'Properties' (Real Estate Sign). Below this are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a note indicating 'No [tab type] have been defined'.

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

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

App Name ↑	Developer Name	Description	Last Modified ...	Ap... ↓	Vi... ↓
1 All Tabs	AllTabSet		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 Name

*Developer Name

Description

App Branding

Image

Primary Color Hex
Value #007002

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

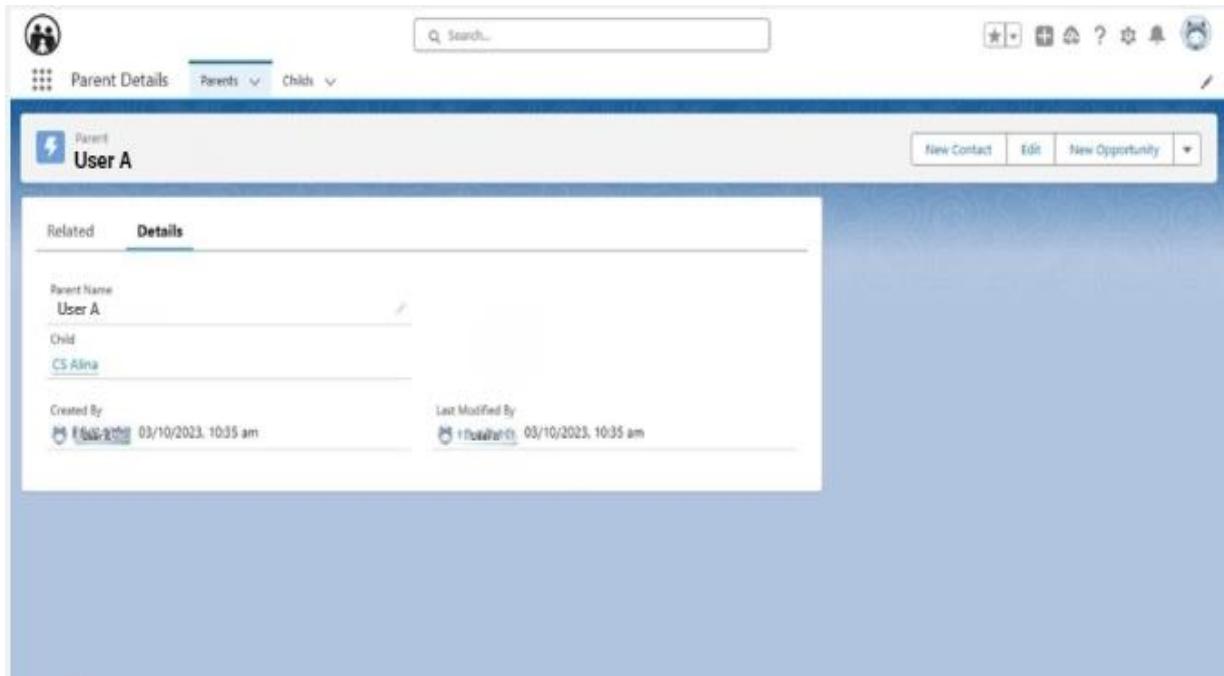
App Launcher Preview

Next

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

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

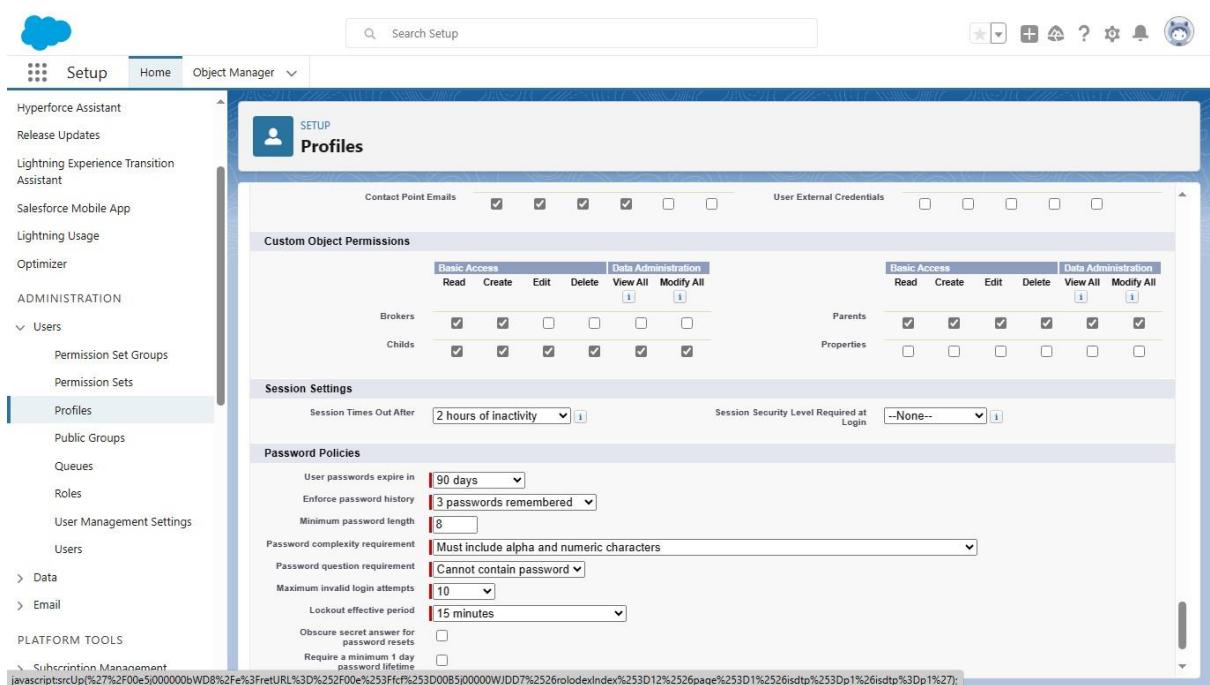
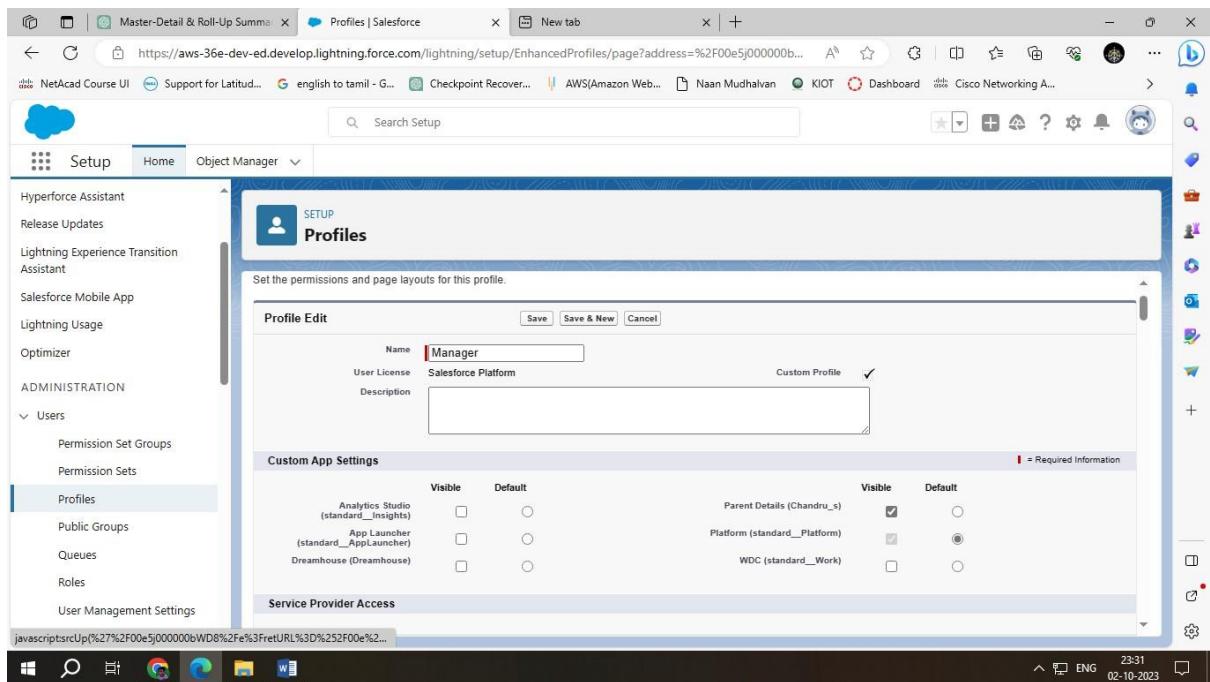
That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



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

Step 1: Create a Public Group

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



Step 2: Create Criteria-Based Sharing Rules

For User 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."

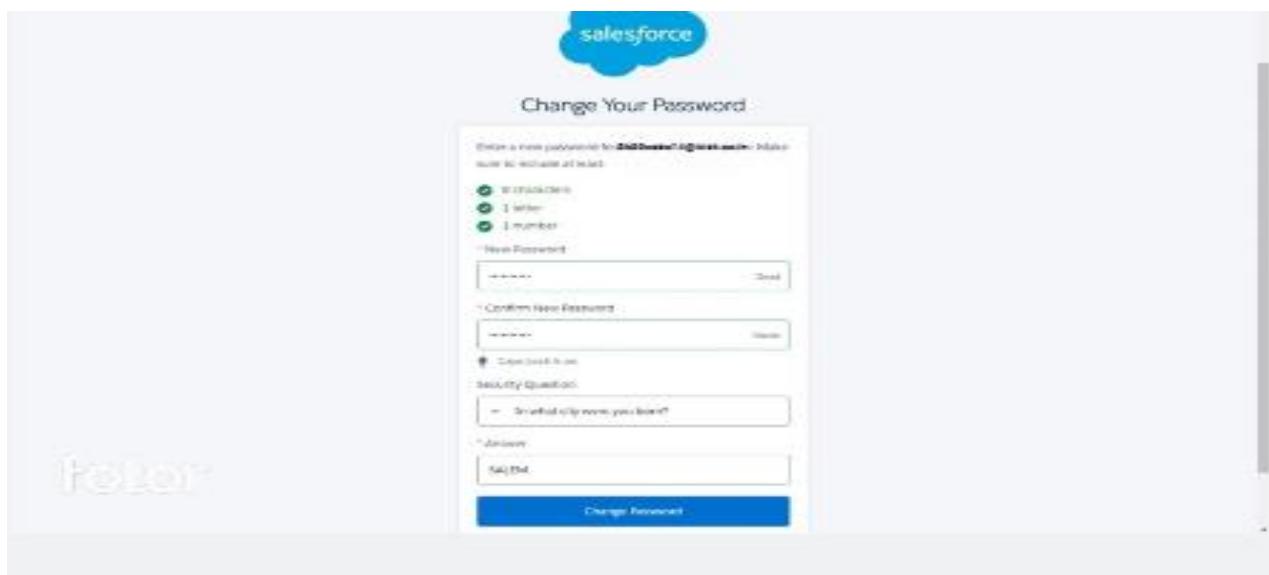
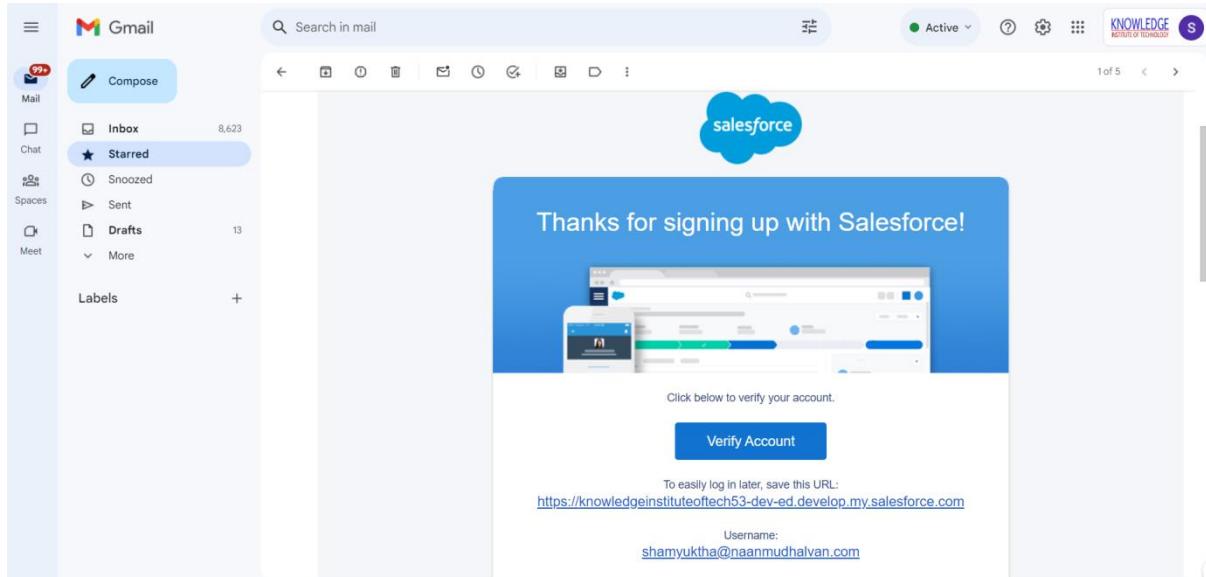
5. Define the criteria based on which records should be shared (e.g., ownership).

6. Save the sharing rule.

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing various setup categories like Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, and Administration (with sub-options like Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, and User Management Settings). The main content area is titled 'SETUP' and 'Users'. It shows a user record for 'SHAMYUKTHA P' with the following details:

General Information		Role	
First Name	SHAMYUKTHA	Role	<None Specified>
Last Name	P	User License	Salesforce Platform
Alias	sp	Profile	Standard Platform User
Email	2k20csbs41@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	Sam#02@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User169751894951873192	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

This screenshot shows the 'User Detail' screen for the same user 'SHAMYUKTHA P'. The layout is similar to the previous screenshot but includes additional tabs at the top: 'Edit', 'Sharing', 'Reset Password', and 'Freeze'. The 'Sharing' tab is currently selected. The user details are identical to the previous screenshot. The right side of the screen displays the same list of configuration options under the 'Sharing' tab.



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

Object Permissions

	Basic Access	Read	Create	Edit	Delete	Data Administration	View All	Modify All
Contact Point Addresses	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Contact Point Consents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

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

- 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 sidebar is open, showing sections like Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. Under Users, the 'Users' section is selected. The main content area displays the 'User Edit' screen for a user named 'SHAMYUKTHA 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 are dropdown menus for Role, User License, Profile, and Active status. Below these are various checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type. At the bottom, there are fields for Data.com Monthly Addition Limit (set to 300), Accessibility Mode (Classic Only), and High-Contrast Palette on Charts.

Step 3: Assign Records Ownership

The screenshot shows the Salesforce Setup interface. The navigation sidebar is open, showing sections like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. Under Users, the 'Permission Sets' section is selected. The main content area displays the 'Permission Set Create' screen. It has a 'Enter permission set information' section with fields for Label ('permission'), API Name ('permission'), Description (empty), and Session Activation Required (unchecked). Below this is a section titled 'Select the type of users who will use this permission set' with a note about choosing license types. At the bottom, there is a note about permission set licenses and a dropdown for 'License' (set to '-None-').

Permission Set
permission

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
Accounts	No Access	40	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage 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"/>

knowledgeinstituteoftech53-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Commerce Setup Center

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

Users

> Data

> Email

SETUP

Users

All Users

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

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	A_User	ua	ua@mail.com	CEO	✓	Salesforce API Only, System Integrations
Edit	B_User	ub	ub@gmail.com	CFO	✓	Custom Support Profile
Edit	Chatter Expert	Chatter	chatty_005f0000000bk9aeat.8tpZ4ebhYxb@chatter.salesforce.com		✓	Chatter Free User
Edit	P.SHAMYUKTHA	sp	sam02@gmail.com		✓	Standard Platform User
Edit	Prakasan_Shamyuktha	SPrak	shamyuktha@naanmudhalvan.com		✓	System Administrator
Edit	User_Integration	integ	integration@005f0000000bk9aeat.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightsecurity@005f000000bk9aeat.com		✓	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

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

knowledgeinstituteoftech53-dev-ed.lightning.force.com/lightning/setup/ManageUsers/assignPermissions

Setup Home Object Manager

Commerce Setup Center

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

Users

> Data

> Email

permission

Select an Expiration Option For Assigned Users

No-expiration date

Specify the expiration date

Time Zone: Select a time zone...

Selected Users
Full Name: Jayashree A. Role: Manager Profile: Manager Active: Yes User License: Salesforce Platform Expires On: Never Expires

Cancel Back Assign

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, and various user management sections like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area displays a success message: "1 assignments were successful." Below this is a table titled "Assignment Summary" with columns for Full Name, User License, Expires On, Time Zone, and Status. A single row is shown for "SHAMYUKTHA P" with a status of "Success".



Permission Sets	
<u>Operating Hours Holidays</u>	--
<u>Opportunities</u>	No Access
<u>Opportunity_Contact_Role</u>	--
<u>Opportunity_Product</u>	--
<u>Order_Products</u>	--
<u>Orders</u>	No Access
<u>Parents</u>	No Access
<u>Party_Consents</u>	No Access
<u>Payment_Authorization_Adjustments</u>	No Access
<u>Payment_Authorizations</u>	No Access
<u>Payment_Gateway_Logs</u>	No Access
<u>Payment_Gateways</u>	No Access
<u>Payment_Groups</u>	No Access
<u>Payment_Line_Invoices</u>	No Access
<u>Payments</u>	No Access
<u>Pending_Order_Summaries</u>	No Access
<u>Pending_Order_Summary_Processed_Events</u>	No Access
<u>Price_Book_Entries</u>	--
<u>Price_Books</u>	No Access
<u>Privacy_Consents</u>	No Access
<u>Problem_Related_Items</u>	--
<u>Problems</u>	No Access
<u>Process_Cart_Pricing_Events</u>	No Access
<u>Process_Cart_Pricing_Response_Events</u>	No Access
<u>Process_Exceptions</u>	No Access
<u>Product_Attributes</u>	--
<u>Product_Attribute_Set_Products</u>	--

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).
- Top Bar:** Features a search bar labeled "Search Setup" and various navigation icons.
- Current Page:** The "Permission Sets" page for the "permission" object.
- Page Content:** Shows the "permission Set Overview" with tabs for "Object Settings" and "Parents".
 - Parents:** A table with columns "Available" and "Visible".
 - Tab Settings:** A table with columns "Permission Name" and "Enabled".
 - Object Permissions:** A table with columns "Permission Name" and "Enabled".
 - Field Permissions:** A table with columns "Field Name", "Read Access", and "Edit Access".
- URL:** https://aws-36e-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/0P55j000007Uxo!e?=&EntityPermissions&o=015j000002rl5H&isdtp=p1

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

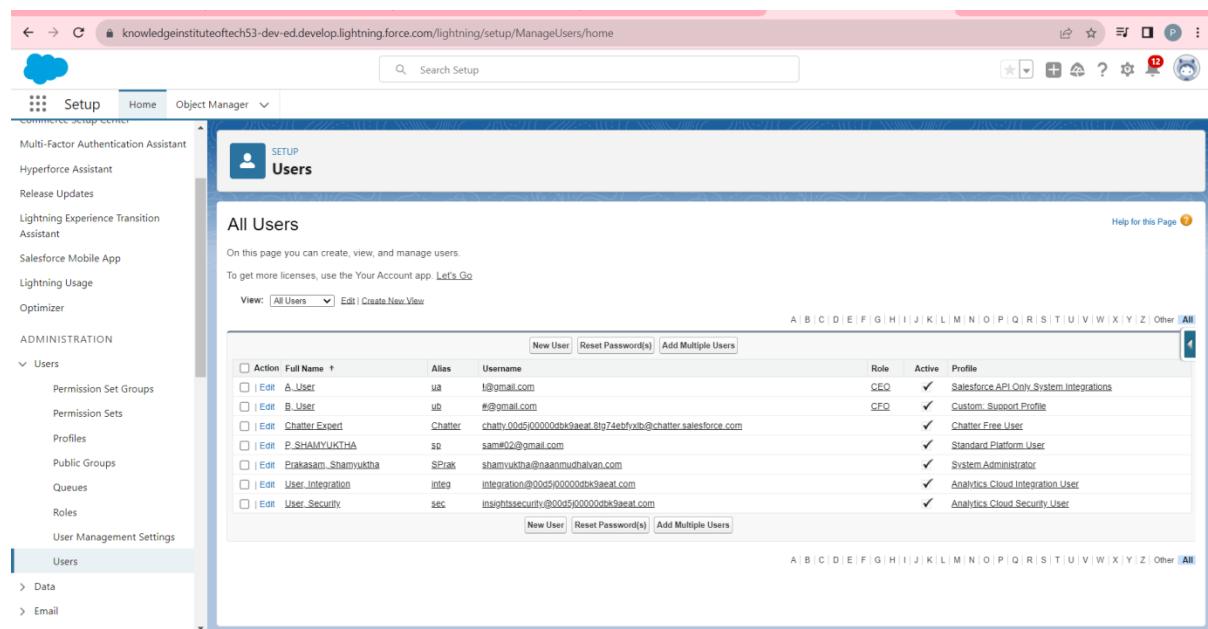
- Left Sidebar:** Same as the first screenshot, showing links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets), Data, Email, and Platform Tools (Subscription Management).
- Top Bar:** Features a search bar labeled "Search Setup" and various navigation icons.
- Current Page:** The "Assignment Summary" page for the "permission" object.
- Page Content:** Displays a success message: "... > PERMISSION S ... 1 assignments were successful." and a table titled "Assignment Summary".

Full Name	User License	Expires On	Time Zone	Status
Sanjay P	Salesforce Platform			Success
- Bottom Right:** A blue "Done" button.

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 following details:

- Header:** knowledgeinstituteoftech53-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home
- Left Sidebar:** Commerce Setup Center, Setup Home, Object Manager, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings), and a current selection of Users.
- Top Bar:** Search Setup, Help for this Page, and various browser icons.
- Page Title:** SETUP Users
- Section:** All Users
- Table:** A list of users with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table includes rows for:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A>User	ua	ti@gmail.com	CEO	<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<input type="checkbox"/>	B>User	ub	#@gmail.com	CFO	<input checked="" type="checkbox"/>	Custom Support Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty@005f0000000nk9aeat.8lq74ebfyxib@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	P.SHAMYUKTHA	sp	samee02@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Prakasan_Shamyuktha	sPrak	shamyuktha@aaamudhalyan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	Integration@00d5j000000dk5aeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d5j000000dk5aeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

- Buttons:** New User, Reset Password(s), Add Multiple Users.

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 with the 'Profiles' page selected. 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, and Optimizer. The main content area displays a profile named 'Edu' with details such as Name: Edu, User License: Salesforce, Description: None, Created By: Shamuktha Prakasam (19/10/2023, 10:46 pm), and Modified By: Shamuktha Prakasam (19/10/2023, 10:47 pm). A note states: "Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information." Below this, a list of permissions is shown, and a 'Profile Detail' section provides edit, clone, delete, and view user options.

The screenshot shows the Salesforce Setup interface with the 'Page Layouts' section of the 'Profiles' page selected. The left sidebar shows the 'Users' section with 'Profiles' highlighted. The main content area displays a table of standard object layouts:

Object	Layout Type	Description	Assignment
Global	Global Layout	[View Assignment]	Object Milestone Layout [View Assignment]
Email Application	Not Assigned	[View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout	Home Page Default	[View Assignment]	Order Layout [View Assignment]
Account	Account Layout	[View Assignment]	Order Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Payment Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout	[View Assignment]	Payment Authorization Layout [View Assignment]
Asset	Asset Layout	[View Assignment]	Payment Authorization Adjustment Layout [View Assignment]
Asset Relationship	Asset Relationship Layout	[View Assignment]	Payment Gateway Layout [View Assignment]
Assigned Resource	Assigned Resource Layout	[View Assignment]	Payment Gateway Log Layout [View Assignment]

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

Left Sidebar:

- Setup Home
- Service Setup Assistant
- Multi-Factor Authentication Assistant
- Hyperforce Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- ADMINISTRATION**
- Users
 - Permission Set Groups
 - Permission Sets
 - Profiles**
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
- Help

Top Bar:

- Cloud icon
- Search bar: Search Setup
- Setup icon
- Home icon
- Object Manager icon
- Star icon
- Plus icon
- Cloud icon
- Question mark icon
- Gear icon
- Bell icon
- User icon

Central Content:

SETUP Profiles

Basic Access

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

Data Administration

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Buttons: Save, Save & New, Cancel

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

Left Sidebar:

- Setup Home
- Home
- Object Manager
- Q user
- Users**
- Permission Set Groups
- Permission Sets
- Profiles**
- Public Groups
- Queues
- Roles
- User Management Settings**
- Users
- Feature Settings
- Data.com
- Prospector Users
- Service

Top Bar:

- Cloud icon
- Search bar: Search Setup
- Setup icon
- Home icon
- Object Manager icon
- Star icon
- Plus icon
- Cloud icon
- Question mark icon
- Gear icon
- Bell icon (with 12 notifications)
- User icon

Central Content:

SETUP Profiles

Profile Edit

Edu

Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit

Name	Save	Save & New	Cancel
Edu			
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			

Profile Edit: Edu ~ Salesforce - Developer Edition

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard_insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input checked="" type="radio"/>

= Required Information

knowledgeinstituteoftech53-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings **Users**

All Users

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

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	A_User	ua	ua@gmail.com	CEO	<input checked="" type="checkbox"/>	Salesforce API Only, System Integrations
Edit	B_User	ub	#@gmail.com	CFO	<input checked="" type="checkbox"/>	Custom_Support Profile
Edit	Chatter Expert	Chatter	chatty@00d5000000bk9aeat.8tg74ebfyytib@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	P.SHAMYUKTHA	sp	samee02@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
Edit	Prakasam_Shamyuktha	SPrak	shamyuktha@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@00d5000000bk9aeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d5000000bk9aeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

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

knowledgeinstituteoftech53-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000AWEg%2Fe%3FisUserEntityOverride%3D1%26retURL%3D25...

Setup Home Object Manager

Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Queues Roles User Management Settings **Users**

User Edit SHAMYUKTHA P

User Edit SHAMYUKTHA P

General Information

First Name	SHAMYUKTHA	Role	<None Specified>
Last Name	P	User License	Salesforce Platform
Alias	sp	Profile	Standard Platform User
Email	2k20csbs41@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	samee02@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User169751894951873192	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>

knowledgeinstituteoftech53-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005j00000AWEgz%3FisUserEntityOverride%3D1

Setup Home Object Manager

User SHAMYUKTHA P

User Detail

Name	SHAMYUKTHA P	Role	Salesforce Platform
Alias	sp	User License	Standard Platform User
Email	2k20csbs41@kiot.ac.in	Profile	
Username	sam#02@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16975189495187319245	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT +05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/> View
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <input type="checkbox"/>
App Registration: One-Time Password		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

User SHAMYUKTHA P

User Edit

User Edit

General Information	Role
First Name: SHAMYUKTHA	Role: <None Specified>
Last Name: P	User License: Salesforce Platform
Alias: sp	Profile: Standard Platform User
Email: 2k20csbs41@kiot.ac.in	Active: <input checked="" type="checkbox"/>
Username: sam#02@gmail.com	Marketing User: <input type="checkbox"/>
Nickname: User169751894951873192	Offline User: <input type="checkbox"/>
Title:	Knowledge User: <input type="checkbox"/>
Company:	Flow User: <input type="checkbox"/>
Department:	Service Cloud User: <input type="checkbox"/>
Division:	Site.com Contributor User: <input type="checkbox"/>
	Site.com Publisher User: <input type="checkbox"/>
	WDC User: <input type="checkbox"/>
	Mobile Push Registrations: <input type="checkbox"/>
	Data.com User Type: --None--
	Data.com Monthly Addition Limit: 300
	Accessibility Mode (Classic Only): <input type="checkbox"/> <input type="checkbox"/>
	High-Contrast Palette on Charts: <input type="checkbox"/> <input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar shows navigation options like Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-options like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, and Roles). The main content area is titled 'Admin Users' and shows a table with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. One user, 'SPrak', is listed with the alias 'shamyutha@naanmudhalvan.com', role 'System Administrator', and active status checked.

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 shows the same navigation options as the previous screenshot. The main content area is titled 'Permission Sets' and shows a table with columns for Action, Permission Set Label, Description, and License. Several permission sets are listed, such as 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent', 'Contact Center Supervisor', 'Experience Profile Manager', 'Facility Manager', 'FieldServiceMobileStandardPermSet', 'Merchandiser', 'Order Management Agent', 'Order Management Operations Manager', 'Order Management Shopper', and 'Order Management Store Associate'. Each entry includes a brief description of its features and the license it requires.

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 actions like Read, Create, Edit, Delete, View All, and Modify All. The 'Field Permissions' section lists account fields with checkboxes for 'Read Access' and 'Edit Access'.

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

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users, Permission Set Groups, and Permission Sets (which is selected).
- Main Content:** The title is "Permission Sets" under "SETUP". A permission set named "permission01" is displayed. The "Accounts" object settings are selected. The "Object Permissions" section shows the following permissions for the "Accounts" object:

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 type="checkbox"/>
Modify All	<input type="checkbox"/>

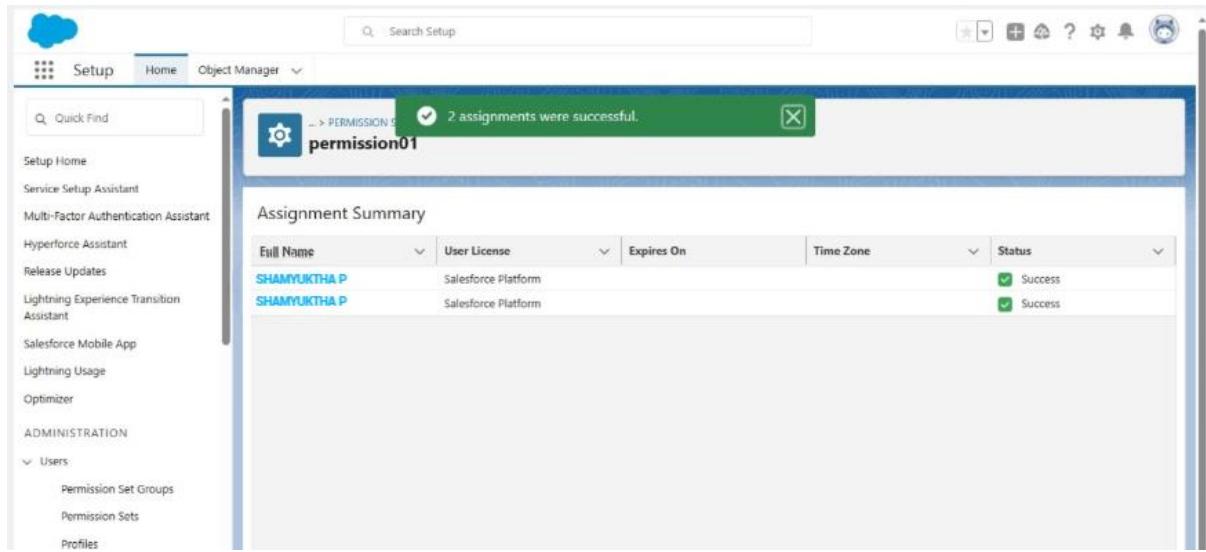
The "Field Permissions" section shows the following access levels for various account fields:

Field Name	Read Access	Edit Access
Account Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Source	<input type="checkbox"/>	<input type="checkbox"/>
Active	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	<input type="checkbox"/>	<input type="checkbox"/>

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

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users, Permission Set Groups, and Profiles (which is selected).
- Main Content:** The "Profiles" section displays two profiles:

Full Name	Role	Profile	Active	User License	Expires On
SHAMYUKTHA P		chan	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires
SHAMYUKTHA P		chan	<input checked="" type="checkbox"/>	Salesforce Platform	Never Expires



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
---	---

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.

Help for this Page ?

Email Alert Edit

Edit Email Alert

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email [i](#)

Object: Survey Result

Email Template: Thank You Email - Survey [S](#)

Protected Component:

Recipient Type: Search: User for: [F](#) Find

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 [S](#)

Make this address the default From email address for this object's email alerts. [i](#)

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

* Flow API Name

Description

[Hide Advanced](#)

How to Run the Flow [?](#)

User or System Context—Depends on How Flow is Launched

* Type

* API Version for Running the Flow

Interview Label [?](#)

Insert a resource...

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**

<p>Site Label <input type="text" value="Survey"/> i</p> <p>Site Name <input type="text" value="Survey"/> i</p> <p>Site Description <div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div></p> <p>Site Contact <input type="text" value="Rakesh Gupta"/> i</p> <p>Default Record Owner <input type="text" value="Rakesh Gupta"/> i</p> <p>Default Web Address <input type="text" value="http://katihar-developer-edition.gus.force.com/ survey"/> i</p> <p>Active <input checked="" type="checkbox"/> i</p> <p>Active Site Home Page <input type="text" value="Survey"/> [Preview]</p> <p>Inactive Site Home Page <input type="text" value="InMaintenance"/> [Preview]</p> <p>Site Template <input type="text" value="SiteTemplate"/> i</p> <p>Site Robots.txt <input type="text"/></p> <p>Site Favorite Icon <input type="text"/></p> <p>Analytics Tracking Code <input type="text"/></p> <p>URL Rewriter Class <input type="text"/> i</p> <p>Enable Feeds <input type="checkbox"/></p> <p>Clickjack Protection Level <input type="text" value="Allow framing by the same origin only (Recommended)"/> i</p> <p>Require Secure Connections (HTTPS) <input checked="" type="checkbox"/> i</p> <p>Lightning Features for Guest Users <input checked="" type="checkbox"/> i</p> <p>Upgrade all requests to HTTPS <input checked="" type="checkbox"/> i</p> <p>Enable Content Sniffing Protection <input checked="" type="checkbox"/> i</p> <p>Enable Browser Cross Site Scripting Protection <input checked="" type="checkbox"/> i</p> <p>Referrer URL Protection <input checked="" type="checkbox"/> i</p> <p>Guest Access to the Payments API <input type="checkbox"/> i</p>
--

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.