

NAAN MUDHALVAN
Salesforce Developer(Course)
Assignment no 1

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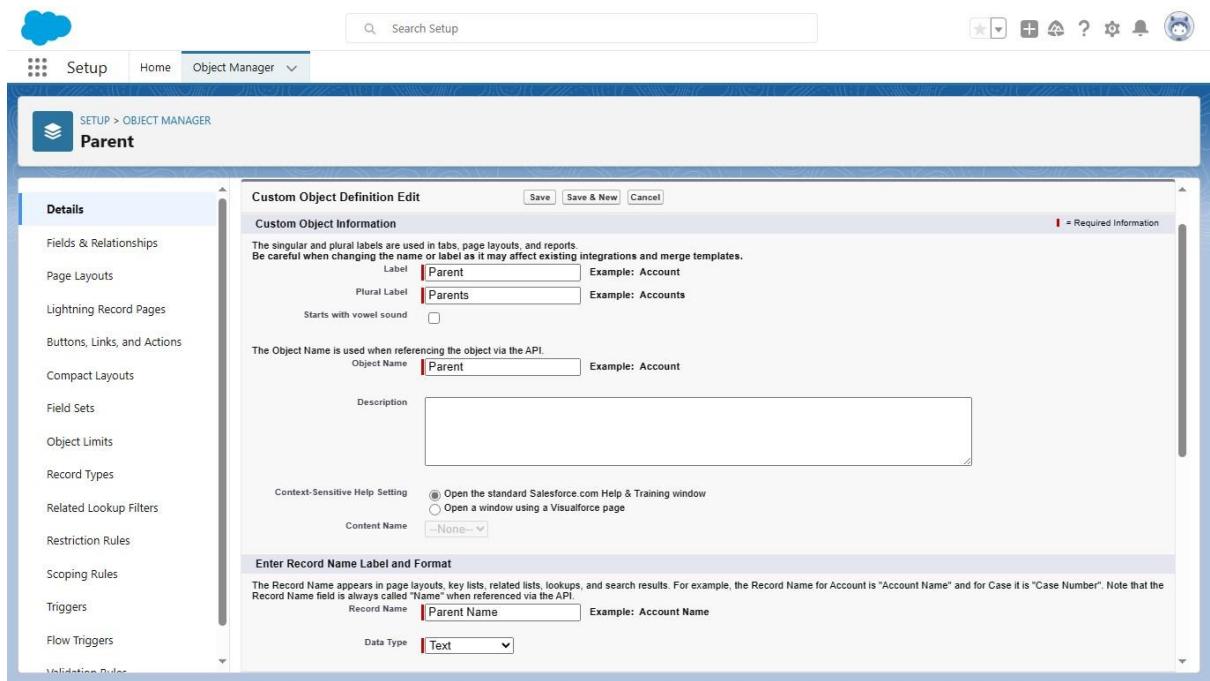
YEAR & DEP : IV YEAR & CSBS

BATCH : 2024

ZONE NO : ZONE 8

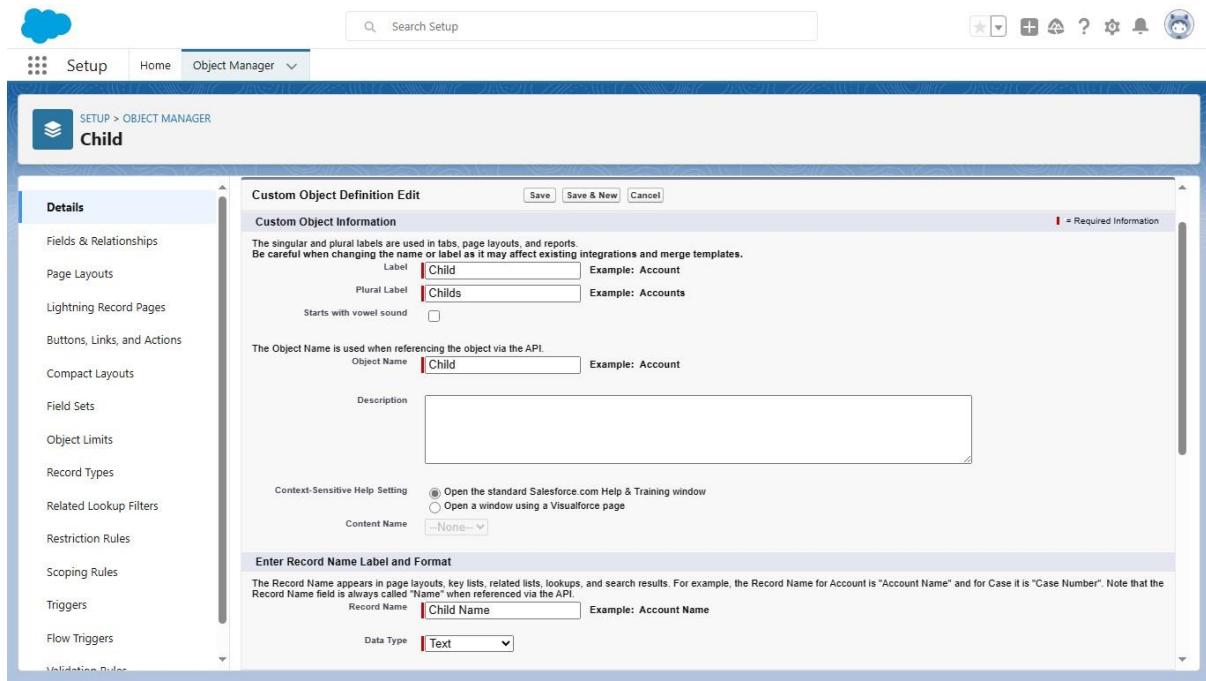
1. Creating a Master-Detail Relationship between two custom objects and setting up a Roll-Up Summary Field to calculate the total number of records in the child object is a common task in Salesforce. Below are the steps to achieve this:

Step 1: Create Custom Objects.



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

- Header:** Search Setup, Setup, Home, Object Manager
- Page Title:** SETUP > OBJECT MANAGER Parent
- Left Sidebar (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.
- Main Content:**
 - Custom Object Information:** Label: Parent, Plural Label: Parents, Starts with vowel sound:
 - Object Name:** Object Name: Parent, Example: Account
 - Description:** A large text input field.
 - Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (radio button selected), Open a window using a Visualforce page (radio button unselected).
 - Content Name:** None
 - Enter Record Name Label and Format:** Record Name: Parent Name, Example: Account Name, Data Type: Text.



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

Parent

SETUP > OBJECT MANAGER

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)		✓

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

Setup | Home | Object Manager

Parent

SETUP > OBJECT MANAGER

New Custom Field

Step 1. Choose the field type

Help for this Page

Step 1

Next Cancel

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.

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

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

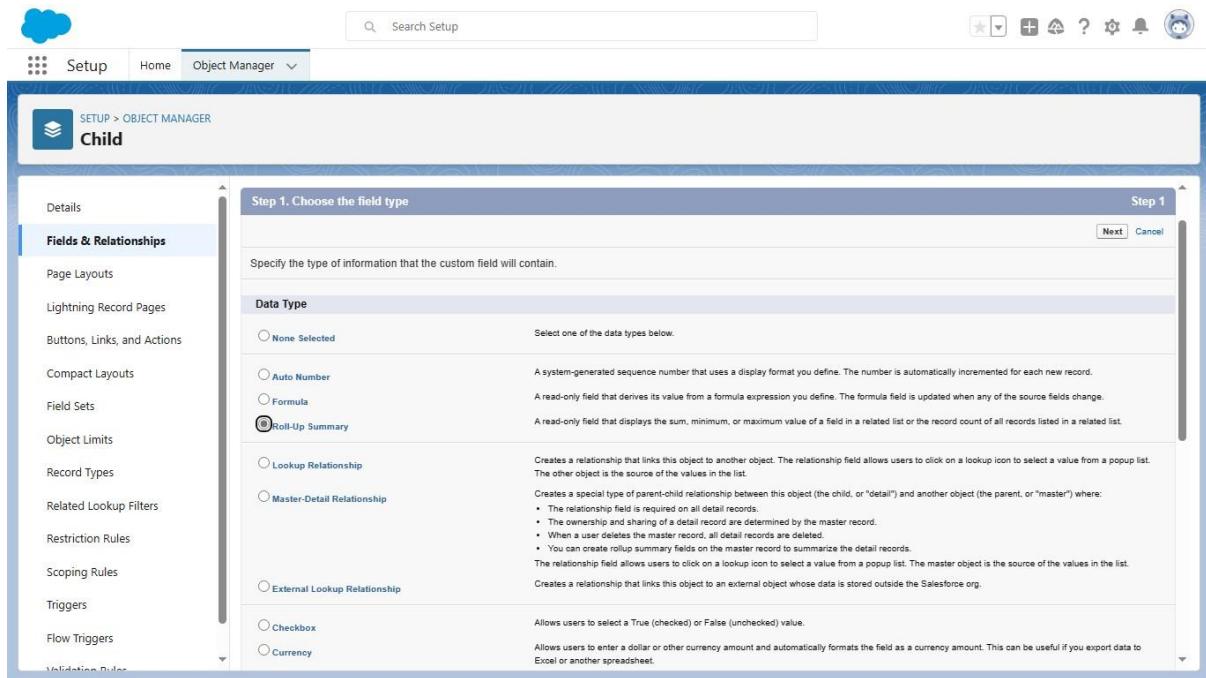
Details

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' tab 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.

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

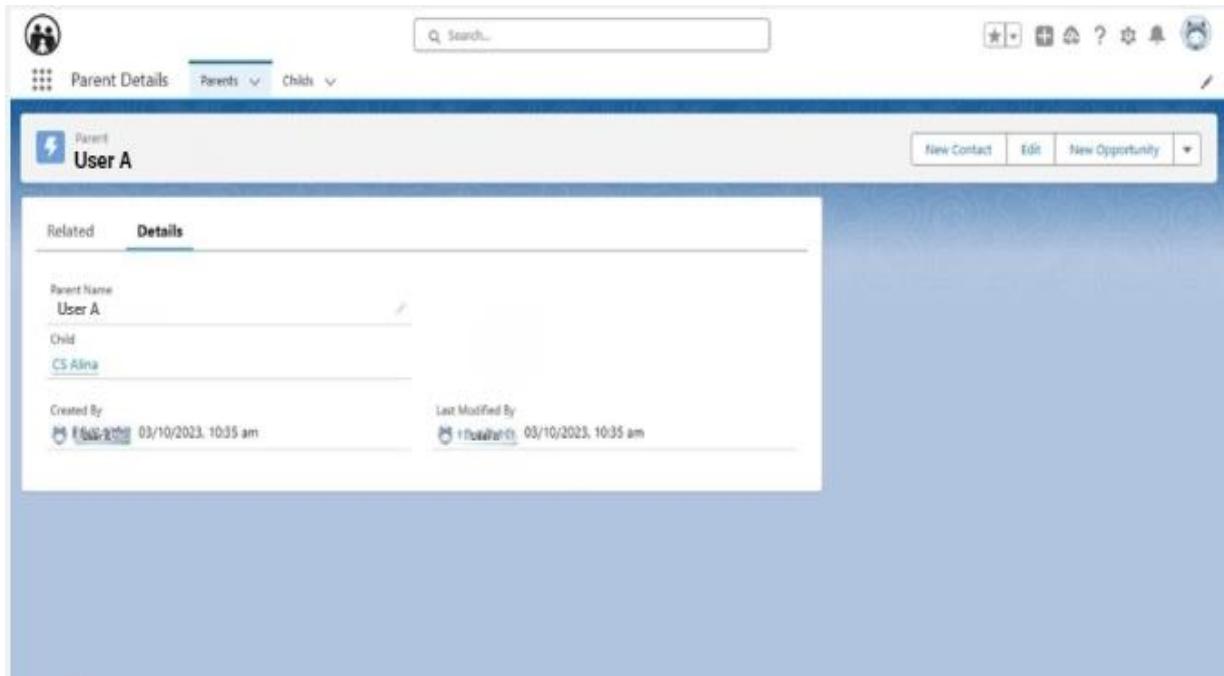
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

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.

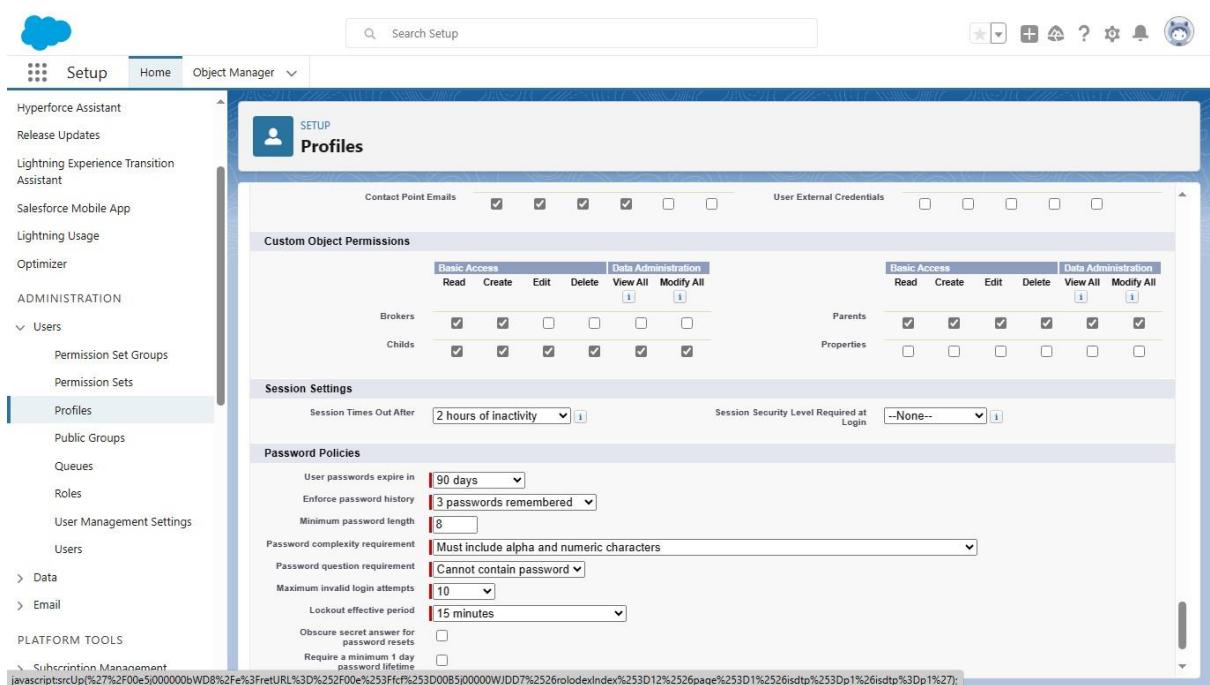
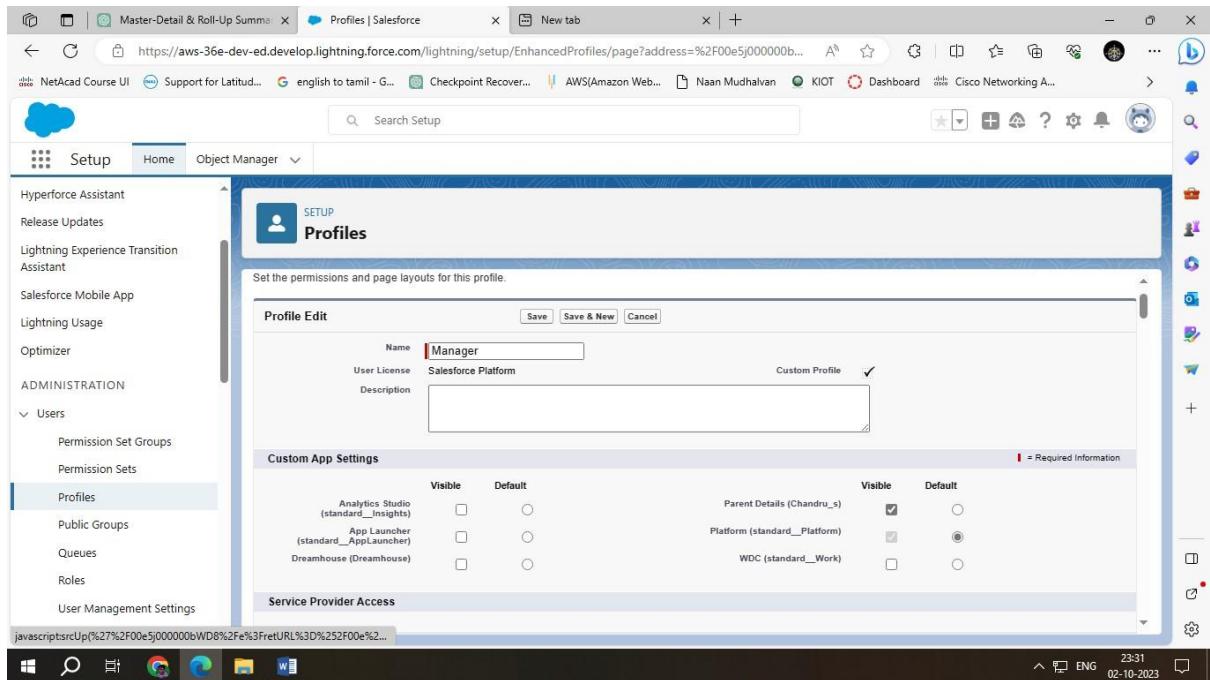
That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



2. If there 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."

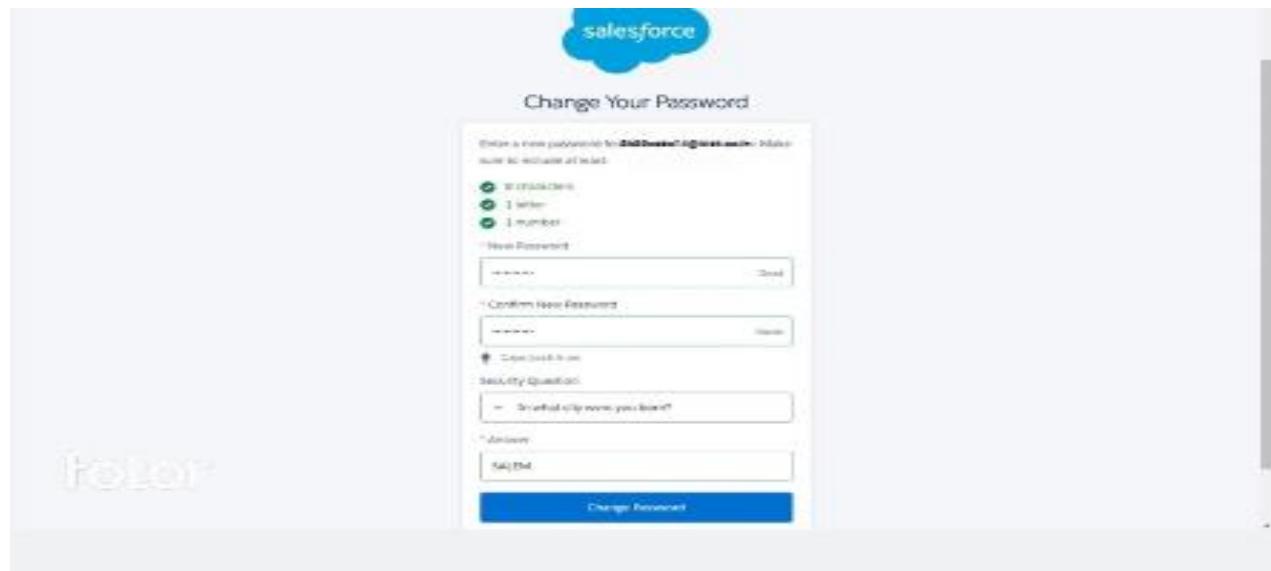
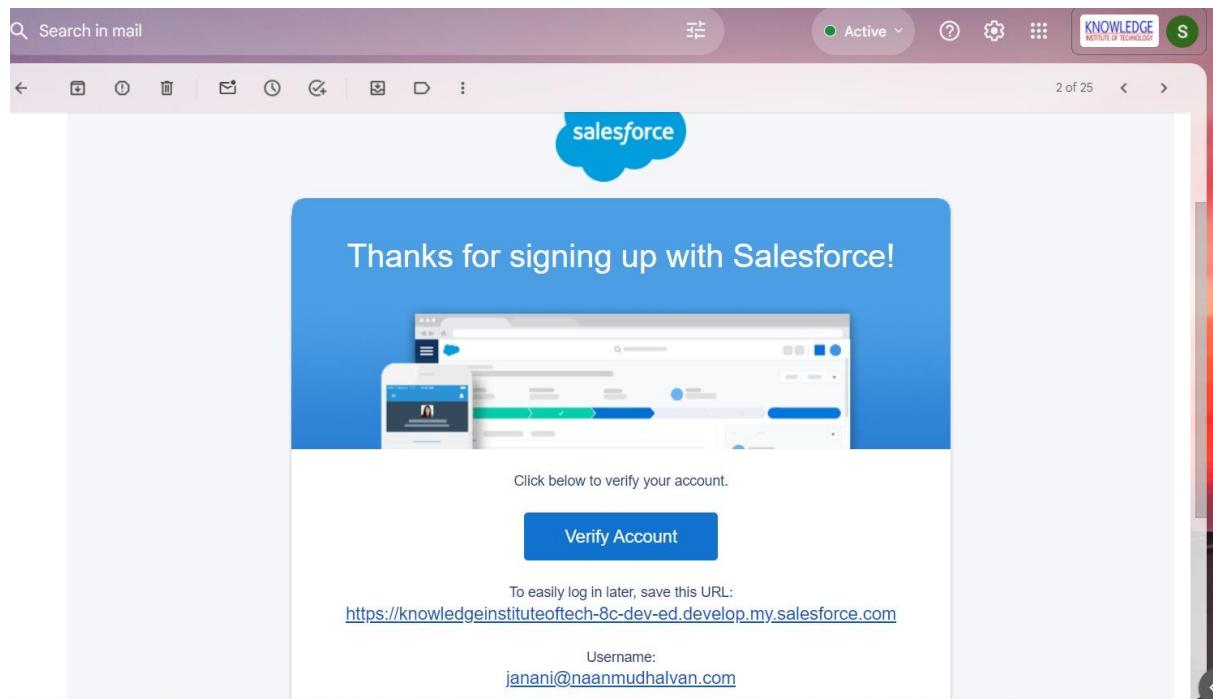
4. Create a rule that shares records owned by members of "UserB_Group" with the "UserA_Group."

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. The left sidebar is titled 'ADMINISTRATION' and includes sections for 'Optimizer', '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 Edit' and shows the details for a user named 'SRIJANANI J S'. The 'General Information' section contains fields for First Name (SRIJANANI), Last Name (J S), Alias (SJ S), Email (2k20csbs40@kiot.ac.in), Username (janani@naannmudhalvan.com), Nickname (User1696323996194126442), Title (empty), Company (KNOWLEDGE INSTITUTE C), Department (empty), and Division (empty). To the right of these fields are checkboxes 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). At the bottom of the edit screen are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous one, with the 'Users' section selected. The main content area is titled 'User Detail' and shows the same user information for 'SRIJANANI J S'. The 'User Detail' section includes tabs for 'Edit', 'Sharing', and 'Change Password'. The 'Sharing' tab is active. Below the tabs, the user's details are listed: Name (SRIJANANI J S), Alias (SJ S), Email (2k20csbs40@kiot.ac.in [Verified]), Username (janani@naannmudhalvan.com), Nickname (User1696323996194126442), Title (empty), Company (KNOWLEDGE INSTITUTE OF TECHNOLOGY), Department (empty), Division (empty), Address (IN), Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata), and Locale (English (India)). To the right of the details are checkboxes for 'Role' (set to 'Salesforce'), 'User License' (set to 'System Administrator'), and various user status checkboxes. At the bottom of the detail screen are 'Edit', 'Sharing', and 'Change Password' buttons.



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

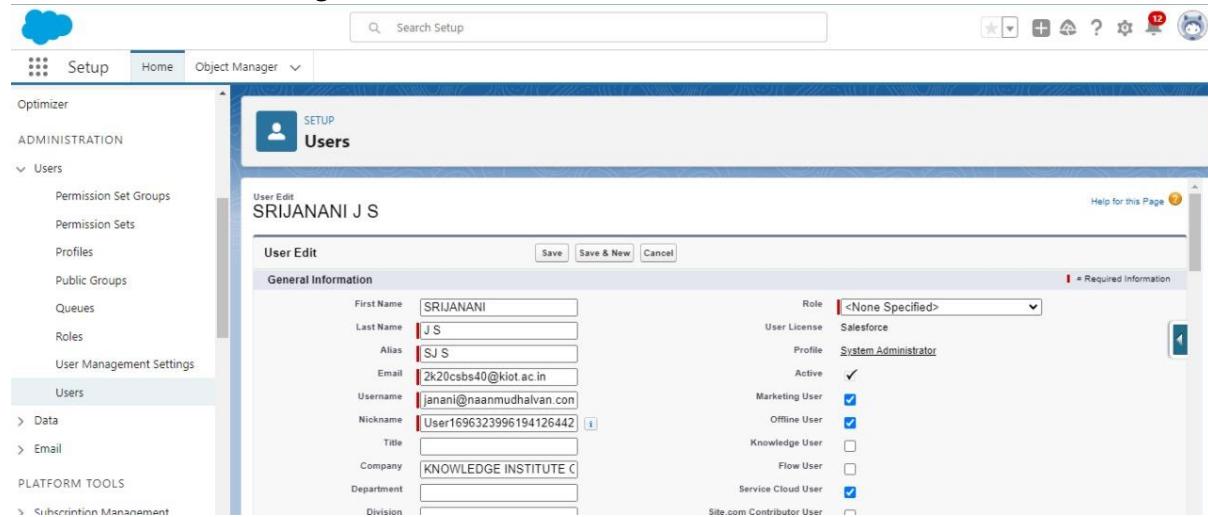
For User B:

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.

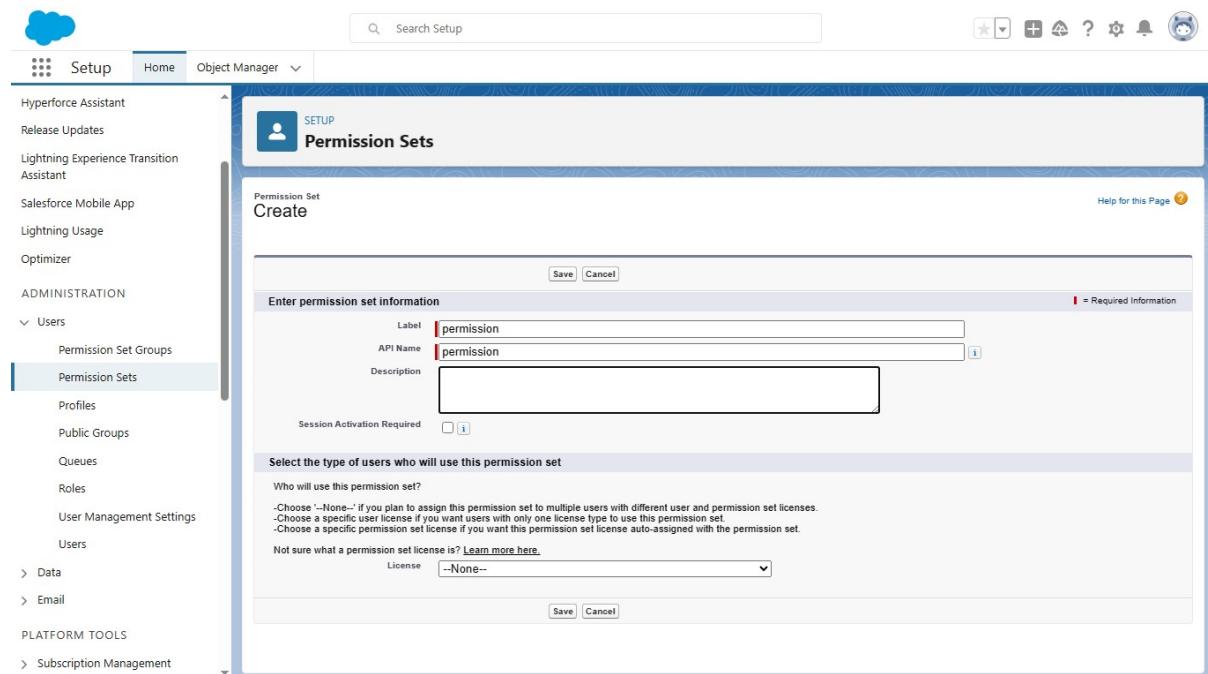
4. Save the sharing rule.



The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A specific user record for 'SRIJANANI J S' is being edited. The 'General Information' section contains the following data:

Field	Value
First Name	SRIJANANI
Last Name	J S
Alias	SJ S
Email	2k20csbs40@kiot.ac.in
Username	janani@naanmudhalvan.con
Nickname	User1696323996194126442
Title	
Company	KNOWLEDGE INSTITUTE C
Department	
Division	
Role	<None Specified>
User License	Salesforce
Profile	System Administrator
Active	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>
Offline User	<input checked="" type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input checked="" type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>

Step 3: Assign Records Ownership



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. A new permission set is being created with the following information:

- Label:** permission
- API Name:** permission
- Description:** (empty)
- Session Activation Required:**
- Select the type of users who will use this permission set:**
 - Who will use this permission set?
 - Choose 'None' - If you plan to assign this permission set to multiple users with different user and permission set licenses.
 - Choose a specific user license if you want users with only one license type to use this permission set.
 - Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
 - Not sure what a permission set license is? [Learn more here.](#)
 - License:** -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 Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invitees	--	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 checked="" 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 type="checkbox"/>

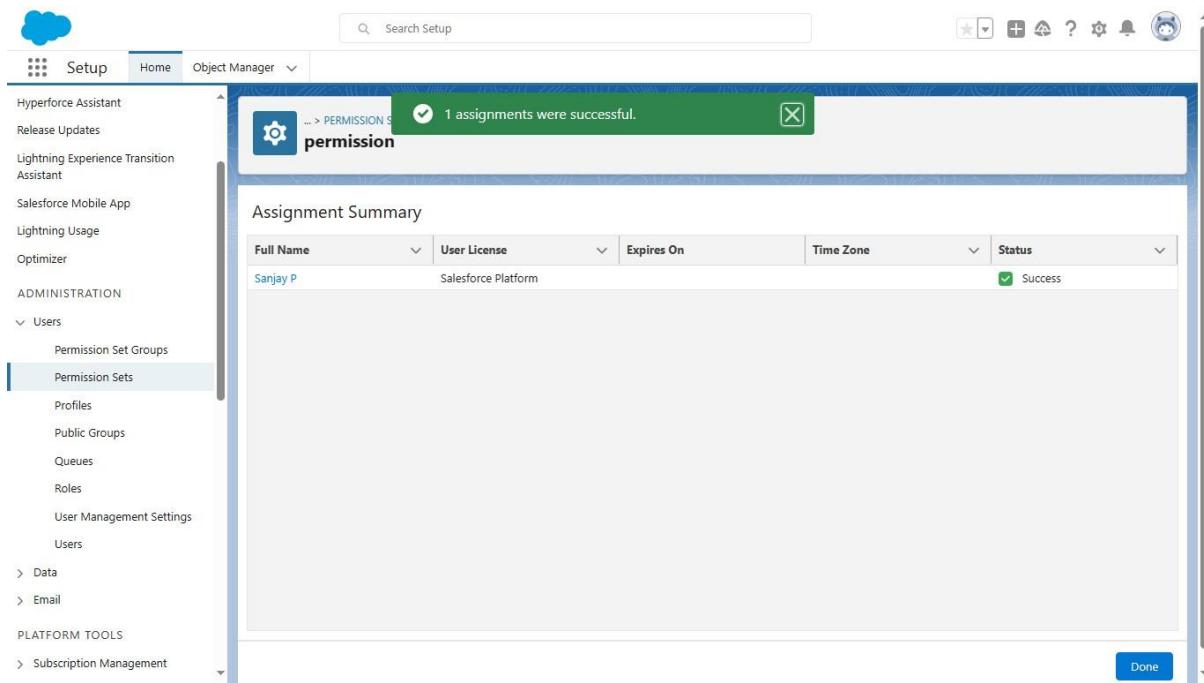
The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar includes links for Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION. Under ADMINISTRATION, there are links for Users, Permission Set Groups, **Permission Sets**, Profiles, and Public Groups. The main content area shows a configuration page for creating a new permission set. It has sections for "No expiration date" (selected) and "Specify the expiration date" (radio button), with options for 1 Day, 1 Week, 30 Days, 60 Days, or Custom Date. A "Time Zone" dropdown is labeled "Select a time zone...". Below these is a table titled "Selected Users" with columns: Full Name, Role, Profile, Active, User License, and Expires On. One user, "srijanani js", is listed with a profile of "chan", active status, "Salesforce Platform" license, and "Never Expires".

This screenshot shows the same Salesforce Setup interface after the permission set was assigned. The navigation sidebar and the main content area are identical to the previous screenshot. However, a prominent green success message at the top of the main window states "1 assignments were successful." with a checkmark icon. The main content area now displays an "Assignment Summary" table with one row for "srijanani js", showing they have been assigned the "Salesforce Platform" license and their status is marked as "Success".

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. The left sidebar navigation includes 'Hyperforce Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'ADMINISTRATION' (with 'Users' expanded), 'Data', 'Email', and 'PLATFORM TOOLS'. The main content area displays a table titled 'Permission Sets' with columns for 'Object' and 'Access Level'. The table lists various objects like Opportunities, Order Products, Orders, Parents, etc., with their respective access levels.

Object	Access Level	Count
Opportunities	No Access	26
Opportunity Contact Role	--	6
Opportunity Product	--	14
Order Products	--	15
Orders	No Access	33
Parents	No Access	4
Party Consents	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 Entries	--	9
Price Books	No Access	6
Privacy Consents	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 'permission' object settings page selected. The left sidebar navigation is identical to the first screenshot. The main content area shows the 'Object Settings' tab for the 'permission' object. It includes sections for 'Parents', 'Tab Settings', 'Object Permissions' (with 'Read' and 'Create' checked), and 'Field Permissions' (with 'Child' and 'Created By' checked). There are 'Save' and 'Cancel' buttons at the top right of the form.



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.**

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Setup Home Object Manager

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
<input type="checkbox"/>	Edit A_User	ua	ua27@gmail.com	VP_Marketing	<input checked="" type="checkbox"/>	Marketing User
<input type="checkbox"/>	Edit B_User	ub	ub02@gmail.com	SVP_Sales & Marketing	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit Chatter_Expert	Chatter	chatty.00d5g00000kha07eab.fn5rj2orwu@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit JS_SRJANANI	SJS	janani@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit User_Integration	integ	integration@00d5g00000kha07eab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit User_Security	sec	insightssecurity@00d5g00000kha07eab.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

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Setup Home Object Manager

SETUP Profiles

All Profiles

Help for this Page

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Edit Clone Analytics_Cloud_Integration_User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Analytics_Cloud_Security_User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Authenticated_Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Authenticated_Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ... Bmanager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone Chatter_External_User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Chatter_Free_User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Chatter_Moderator_User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Contract_Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Cross_Org_Data_Proxy_User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ... Custom_Marketing_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Del ... Custom_Sales_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Del ... Custom_Support_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone Customer_Community_Login_User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Customer_Community_Plus_Login_User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Customer_Community_Plus_User	Customer Community Plus	<input type="checkbox"/>

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

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'ADMINISTRATION' and includes sections for 'Optimizer', 'Users' (with 'Profiles' selected), 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. Below these are 'PLATFORM TOOLS' sections for 'Subscription Management', 'Apps', 'Feature Settings', 'Slack', 'MuleSoft', and 'Einstein'. The main content area is titled 'SETUP Profiles' and shows a 'Clone Profile' form. It prompts the user to 'Enter the name of the new profile.' and states 'You must select an existing profile to clone from.' A dropdown menu shows 'Existing Profile: Standard Platform User', 'User License: Salesforce Platform', and 'Profile Name: Manager'. At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous one. The main content area is titled 'SETUP Profiles' and shows the 'Profile Detail' for 'SRIJA'. The profile details are as follows:

Name	SRIJA	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	SRIJANANI J S	Modified By	SRIJANANI J S
Created Date: 20/10/2023, 3:43 pm Modified Date: 20/10/2023, 3:43 pm			

Below this, the 'Page Layouts' section shows:

Standard Object Layouts	Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned		Opportunity Hours	Opportunity Hours Layout

Page Layouts

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

Basic Access

Object	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"/>
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:

Profile Edit

Name: SRJUA
User License: Salesforce
Description:

Visible	Default	Visible	Default
<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
All Tabs (standard__AllTabSet)	Sales (standard__LightningSales)		
Analytics Studio (standard__Insights)	Sales (standard__Sales)		
App Launcher (standard__AppLauncher)	Sales Console (standard__LightningSalesConsole)		

All Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A_User	ua	ua27@gmail.com	VP_Marketing	<input checked="" type="checkbox"/>	Marketing User
<input type="checkbox"/> Edit	B_User	ub	ub02@gmail.com	SVP_Sales & Marketing	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.0005g00000kha07eab.fny5krj2onwu@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	J.S._SRIJANANI	SJS	janani@naammuhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@0005g00000kha07eab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@0005g00000kha07eab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'SETUP' and contains the following navigation items:

- Optimizer
- ADMINISTRATION
 - Permission Set Groups
 - Permission Sets
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
 - Users**
- PLATFORM TOOLS
 - Data
 - Email
- Subscription Management

The main content area is titled 'SETUP Users' and shows the 'User Edit' screen for a user named 'SRIJANANI J S'. The 'General Information' section displays the following details:

Field	Value
First Name	SRIJANANI
Last Name	J S
Alias	SJ S
Email	2k20cbs40@kilot.ac.in
Username	janani@naanmudhalvan.com
Nickname	User1696323996194126442
Title	
Company	KNOWLEDGE INSTITUTE C
Department	
Division	

On the right side, there are sections for 'Role' (set to '<None Specified>'), 'User License' (set to 'Salesforce'), 'Profile' (set to 'System Administrator'), and various checkboxes for 'Active' (checked), 'Marketing User' (checked), 'Offline User' (checked), 'Knowledge User' (unchecked), 'Flow User' (unchecked), 'Service Cloud User' (checked), and 'Site.com Contributor User' (unchecked). A note at the top right says 'Help for this Page' with a question mark icon.

The screenshot shows the Salesforce browser-based interface. The address bar indicates the URL is knowledgeinstituteoftech-8c-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055g00000HrN4T%3Fnoredir... The page title is 'knowledgeinstituteoftech-8c-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055g00000HrN4T%3Fnoredir...'.

The left sidebar is identical to the one in the first screenshot, showing the 'SETUP' menu and the 'Users' item under 'ADMINISTRATION'.

The main content area is titled 'SETUP Users' and shows the 'User Detail' screen for the same user 'SRIJANANI J S'. At the top, there is a link to 'User ProfileHelp for this Page' with a question mark icon.

The 'User Detail' section displays the same information as the first screenshot, including the user's name, email, nickname, and various profile settings. The 'Role' section shows '<None Specified>' and the 'User License' section shows 'Salesforce'.

User Edit
SRIJANANI J S

General Information

First Name	SRIJANANI	Role	<None Specified>
Last Name	J S	User License	Salesforce
Alias	SJS	Profile	System Administrator
Email	2k20csbs40@klot.ac.in	Active	<input checked="" type="checkbox"/>
Username	janani@naanmudhalvan.com	Marketing User	<input checked="" type="checkbox"/>
Nickname	User1696323996194126442	Offline User	<input checked="" type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	KNOWLEDGE INSTITUTE C	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input checked="" type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>

Admin Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	J.S. SRIJANANI	SJS	janani@naanmudhalvan.com	System Administrator	<input checked="" type="checkbox"/>	System Administrator

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 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, and Administration (with sub-links for Users, Permission Set Groups, and Permission Sets). The main content area displays a table of permission sets, with the first few rows listed below:

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and ca...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Ama...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/>	Del / Clone		Salesforce
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, subloc...	Facility Manager
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mo...	Field Service Mobile
<input type="checkbox"/>	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Order Management Shopper	Limited access to Order Management features for Self Ser...	Lightning Order Management User

The screenshot shows the Salesforce Setup interface with the 'Edit Properties' dialog open for a permission set named 'permission01'. The dialog fields include:

- Label: permission01
- API Name: permission01
- Description: (empty)
- Session Activation Required: (checkbox)

The background shows the 'Permission Set Overview' for 'permission01', which includes details like API Name, Namespace Prefix, and Created By. Below the overview, there are sections for 'Apps' and 'App Permissions' (which lists Apex Class Access, Visualforce Page Access, and External Data Source Access).

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and 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", and "ADMINISTRATION". Under "ADMINISTRATION", there is a "Users" section and a "Permission Set Groups" section which is expanded, showing "Permission Sets" selected. The main content area is titled "Permission Sets" and shows a permission set named "permission01". The "Object Settings" dropdown is set to "Accounts". The "Accounts" tab is selected under "Object Permissions". The "Object Permissions" table has columns for "Permission Name" and "Enabled". The rows show permissions for Read, Create, Edit, Delete, View All, and Modify All, all of which are disabled (unchecked). Below this is a "Field Permissions" table with columns for "Field Name", "Read Access", and "Edit Access". The rows include Account Name, Account Number, Account Owner, Account Site, Account Source, Active, and Annual Revenue, with most having both Read and Edit access enabled except for Account Number.

This screenshot is identical to the one above, showing the "Permission Sets" page for "permission01" in the Salesforce Setup interface. The "Object Settings" dropdown is set to "Accounts". The "Accounts" tab is selected under "Object Permissions". The "Object Permissions" table shows that all permissions (Read, Create, Edit, Delete, View All, Modify All) are now checked and enabled. The "Field Permissions" table also shows that most fields have both Read and Edit access enabled, except for Account Number which only has Read access enabled.

The screenshot shows the Salesforce Setup interface. On the left, the navigation 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, and Administration (with sub-links for Users, Permission Set Groups, and Profiles). The main content area is titled "Create New Permission Set". It has two tabs: "No expiration date" (selected) and "Specify the expiration date". Under "Selected Users", there is a table with two rows:

Full Name	Role	Profile	Active	User License	Expires On
srijanani js		chan	✓	Salesforce Platform	Never Expires
srijanani js		chan	✓	Salesforce Platform	Never Expires

A "Time Zone" dropdown is also present.

The screenshot shows the Salesforce Setup interface after a permission set assignment. The navigation sidebar is identical to the first screenshot. The main content area displays a success message: "...> PERMISSIONS 2 assignments were successful." followed by the title "permission01". Below this is the "Assignment Summary" section, which contains a table:

Full Name	User License	Expires On	Time Zone	Status
srijanani js	Salesforce Platform			✓ Success
srijanani js	Salesforce Platform			✓ Success

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

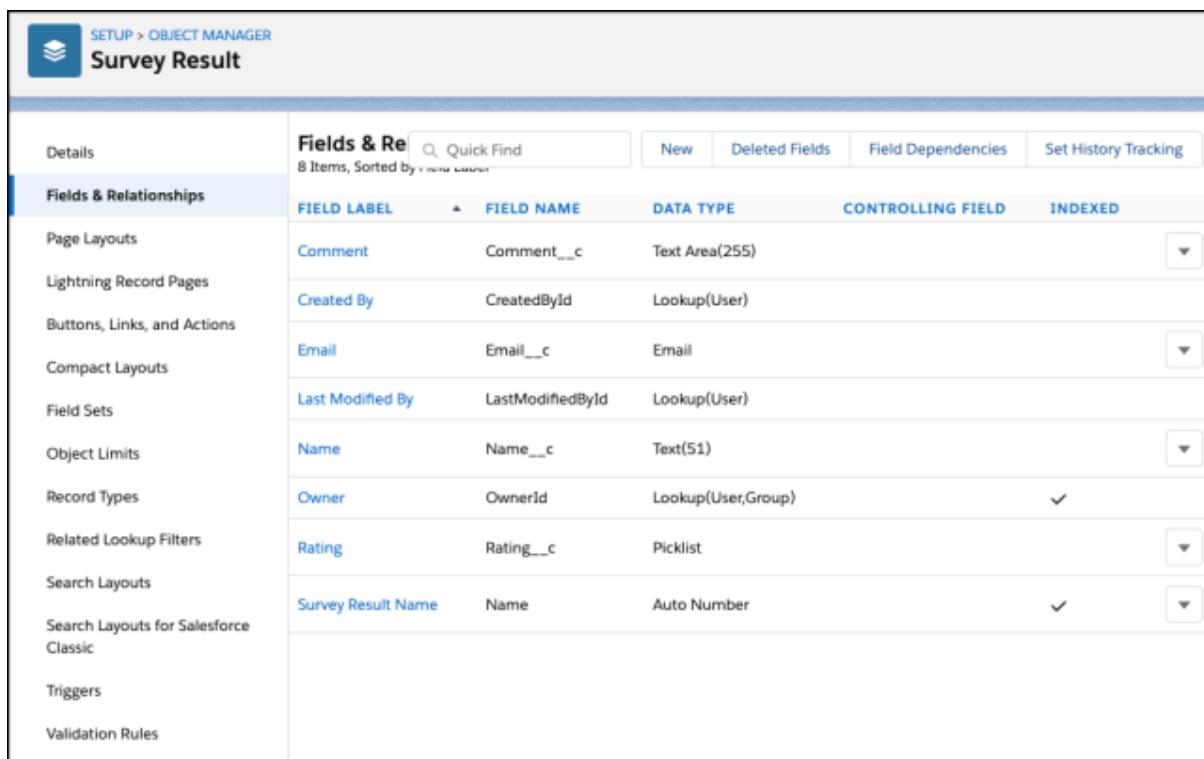
Step 1: Create a custom object

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.



The screenshot shows the Salesforce Object Manager interface. At the top, there's a breadcrumb navigation: SETUP > OBJECT MANAGER. Below it, the title "Survey Result" is displayed. On the left, a sidebar lists various setup categories: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, Triggers, and Validation Rules. The main area is titled "Fields & Relationships" and contains a table with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Comment	Comment__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(51)		
Owner	OwnerId	Lookup(User,Group)		✓
Rating	Rating__c	Picklist		
Survey Result Name	Name	Auto Number		✓

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

1.Click App Launcher.

2.In the Quick Find box, type Email Templates.

3.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 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**

<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.