

NAAN MUDHALVAN
Salesforce Developer(Course)
Assignment no 1

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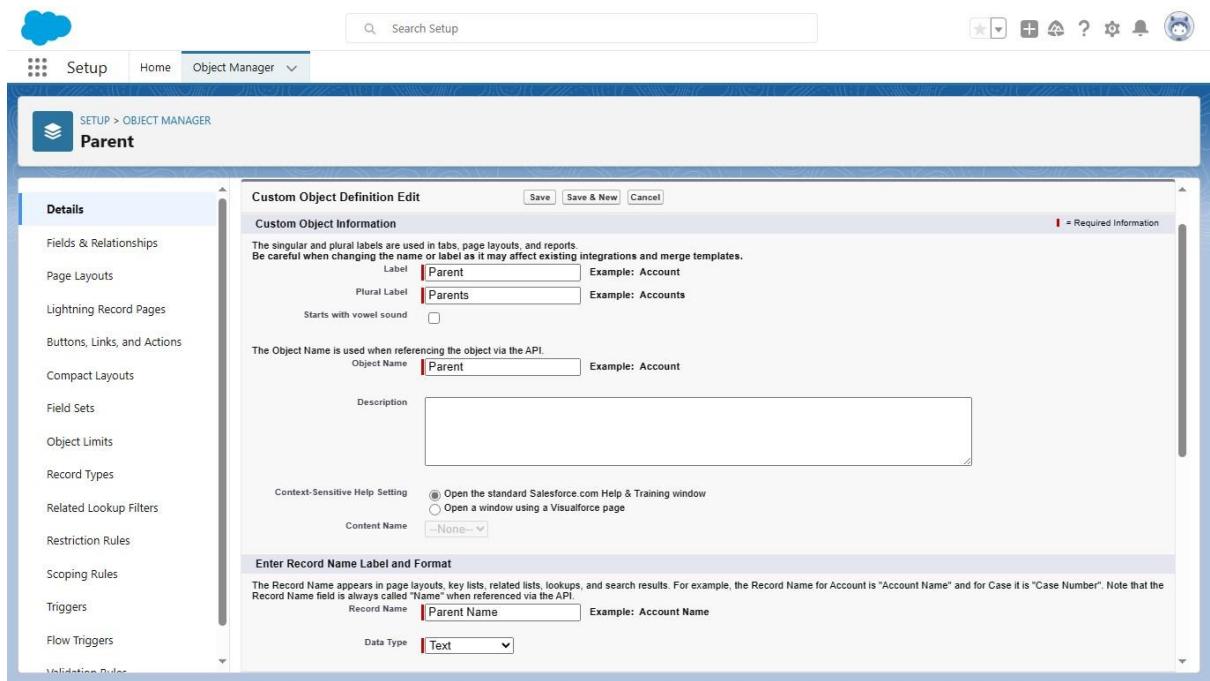
YEAR & DEP : IV YEAR & CSBS

BATCH : 2024

ZONE NO : ZONE 8

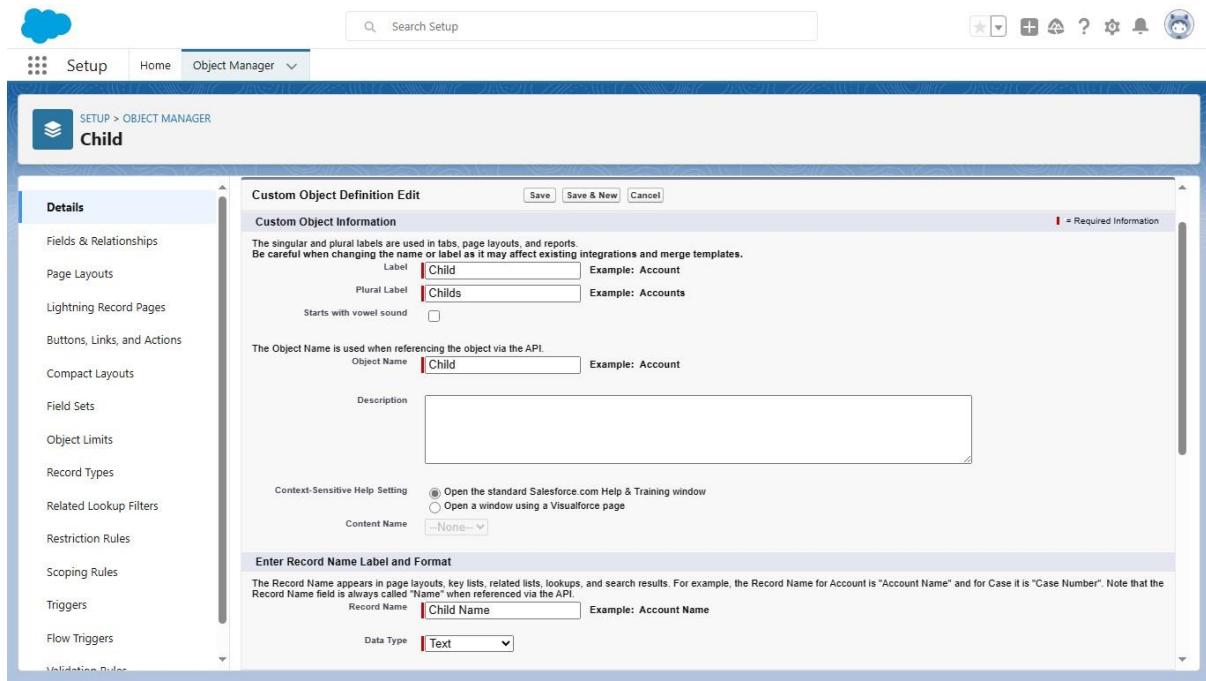
1. Creating a Master-Detail Relationship between two custom objects and setting up a Roll-Up Summary Field to calculate the total number of records in the child object is a common task in Salesforce. Below are the steps to achieve this:

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

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

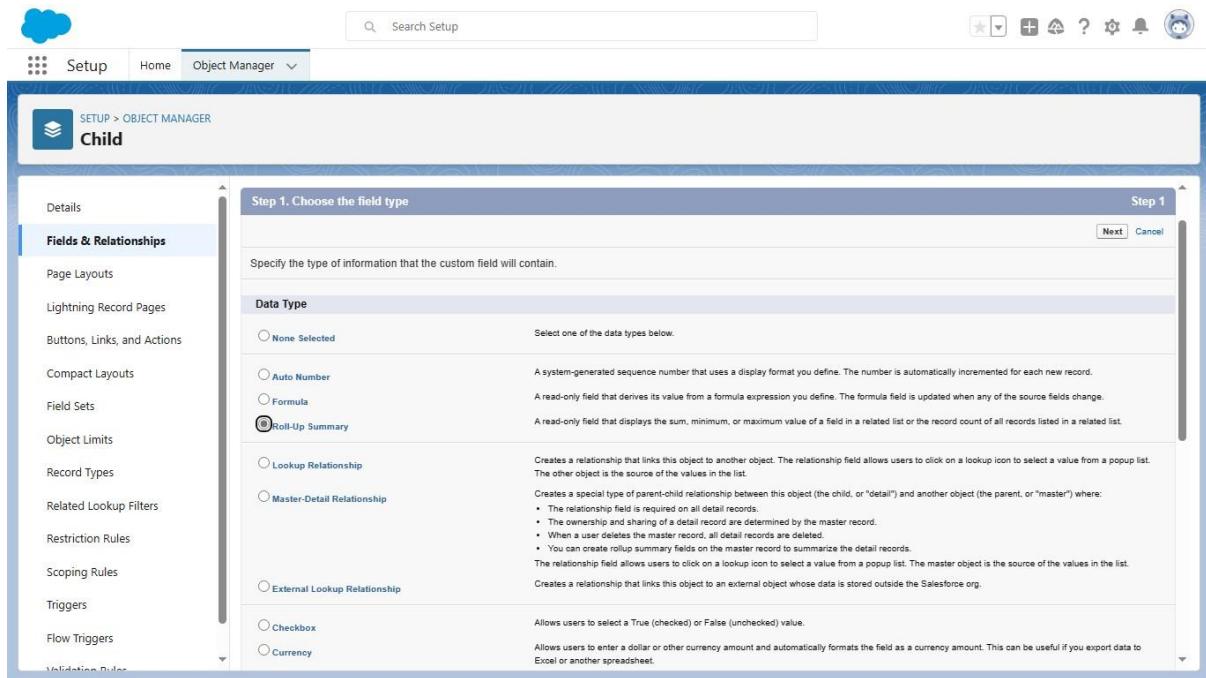
Details

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 style), 'Childs' (Lightning style), 'Parents' (Lightning style), and 'Properties' (Real Estate Sign style). 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 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

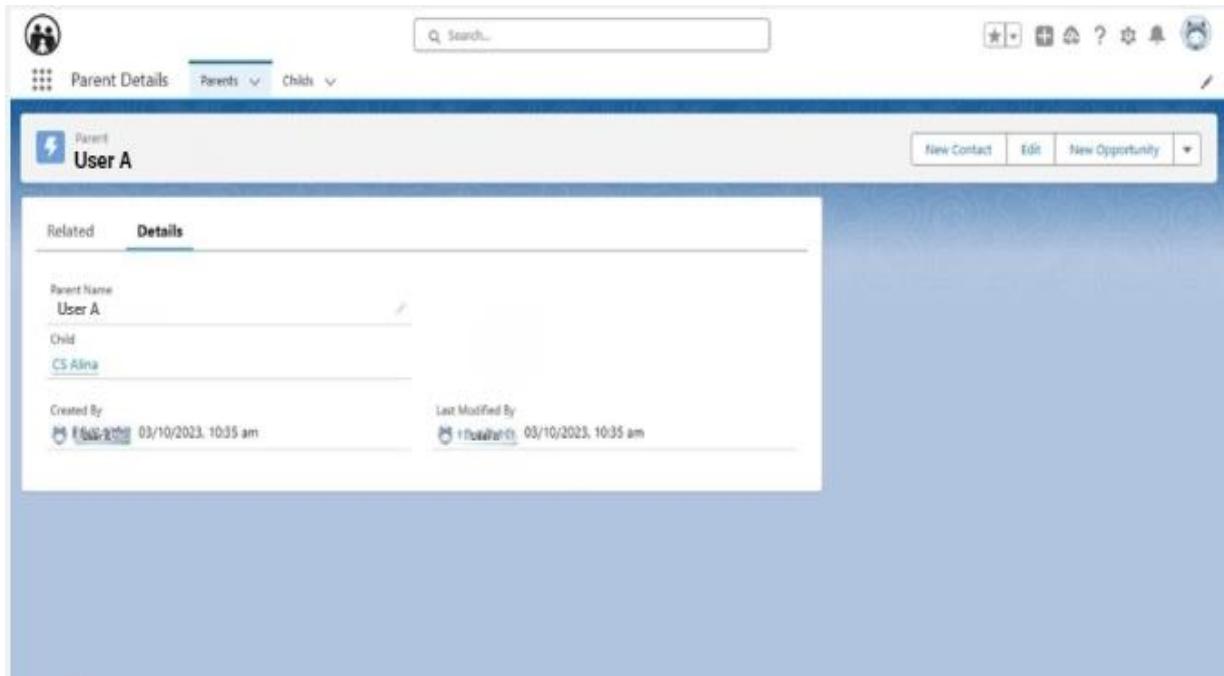
App Launcher Preview

Progress: 0% 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.

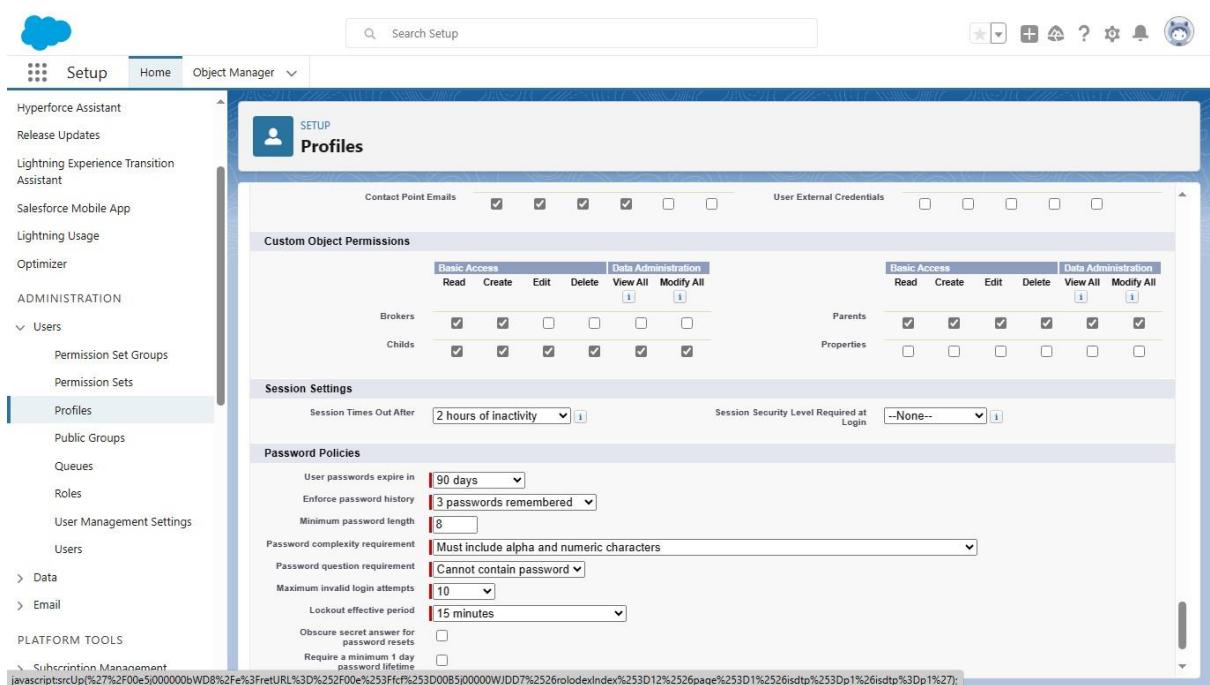
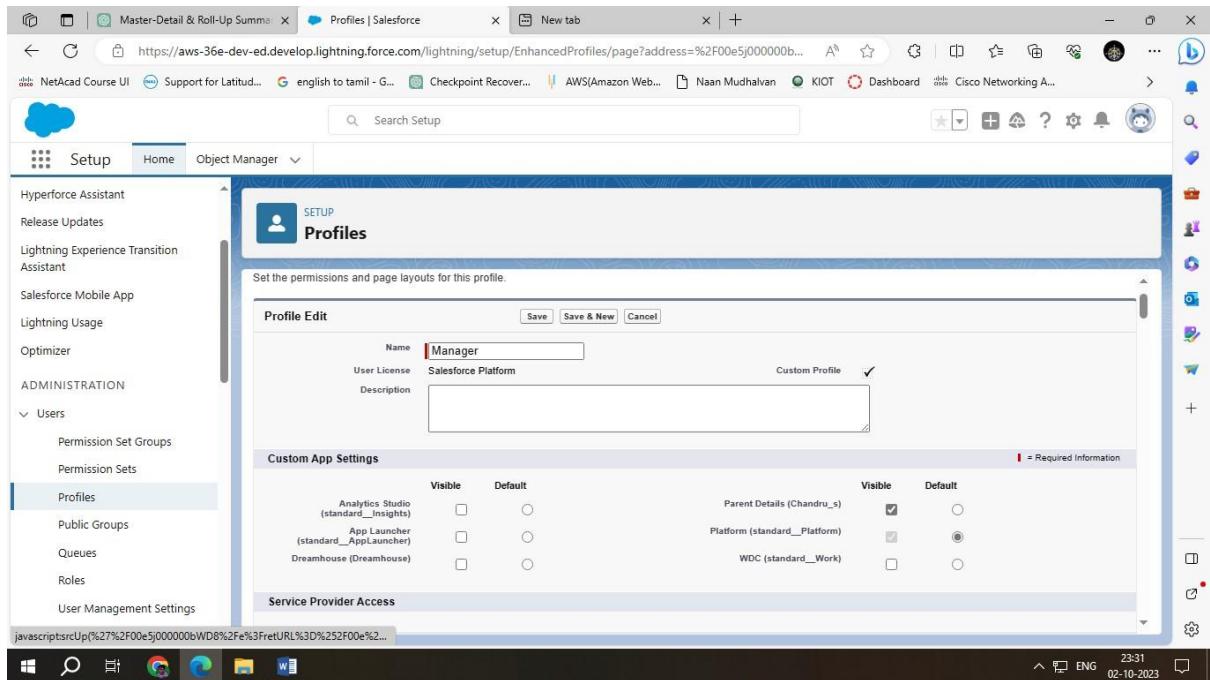
That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



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.

User Edit
DHANUSHYA D

User Edit
General Information

First Name: DHANUSHYA
Last Name: D
Alias: DD
Email: 2k20csbs04@kiot.ac.in
Username: dan@naanmudhalvan.com
Nickname: User169691324587662161
Title:
Company: Knowledge Institute of Tech
Department:
Division:

Role: <None Specified>
User License: Salesforce
Profile: System Administrator
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Data.com User Type: -None-
Data.com Monthly Addition Limit: 300
Accessibility Mode (Classic Only):
High-Contrast Palette:

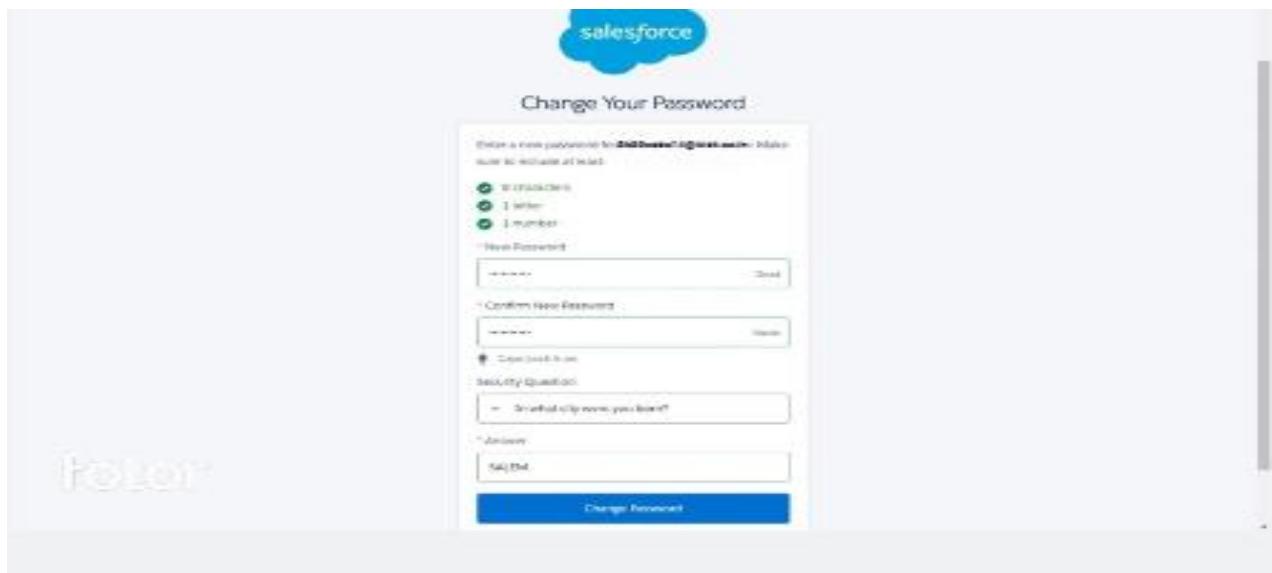
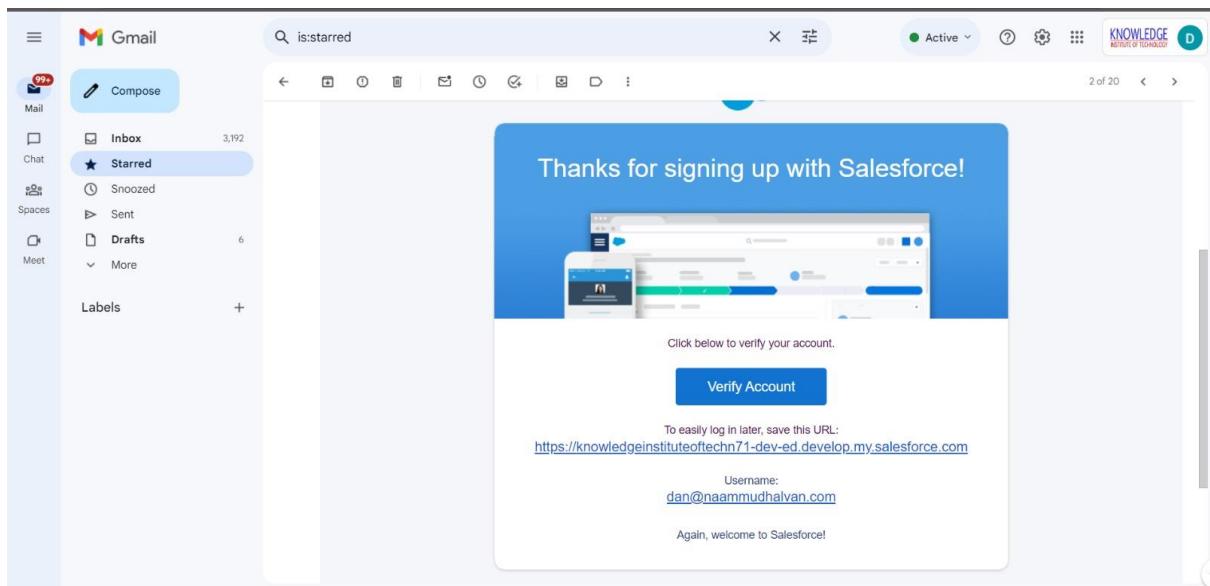
User Detail
DHANUSHYA D

Name: DHANUSHYA D
Alias: DD
Email: 2k20csbs04@kiot.ac.in [Verified]
Username: dan@naanmudhalvan.com
Nickname: User16969132458766216150
Title:
Company: Knowledge Institute of Technology
Department:
Division:
Address: IN
Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale: English (India)
Delegated Approver:
Manager:
Receive Approval Request Emails: Only if I am an approver
Federation ID:
App Registration: One-Time Password Authenticator:

Role:
User License: Salesforce
Profile: System Administrator
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Mobile Push Registrations:
Data.com User Type:
Accessibility Mode (Classic Only):
Debug Mode:
High-Contrast Palette on Charts:
Load Lightning Pages When Possible:
Prompt & Walkthrough Tips:

Type here to search

26°C Partly sunny ENG 8:48:55 PM IN 10/19/2023



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

Contacts

Contact Point Addresses

Contact Point Consents

Contact Point Emails

Push Topics

Sellers

Streaming Channels

User External Credentials

Custom Object Permissions

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

For User B:

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

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

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

4. Save the sharing rule.

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. Under 'ADMINISTRATION', 'Users' is selected, showing sub-options like 'Permission Set Groups', 'Permission Sets', 'Profiles', etc. The main content area displays the 'User Detail' screen for a user named 'DHANUSHYA D'. The 'Sharing' tab is selected. The user's details include Name: DHANUSHYA D, Alias: DD, Email: 2k20cse04@kiot.ac.in [Verified], Username: dan@naanmudhalvan.com, Nickname: User16969132458766216150, Title: Knowledge Institute of Technology, Department: IN, Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata), Locale: English (India), Language: English, Delegated Approver: Manager, Receive Approval Request Emails: Only if I am an approver, Federation ID: App Registration: One-Time Password Authenticator: Connect. The 'Role' section lists 'System Administrator' as the profile. Other tabs like 'Edit', 'Change Password', and 'Sharing' are visible. The status bar at the bottom shows '26°C Partly sunny' and the date '10/19/2023'.

Step 3: Assign Records Ownership

The screenshot shows the Salesforce Setup interface. The left sidebar has 'Users' selected under 'ADMINISTRATION'. The main content area is the 'Permission Sets' create screen. It starts with 'Enter permission set information': Label is 'permission', API Name is 'permission', and Description is empty. A note says 'Session Activation Required' is optional. Below that is a section titled 'Select the type of users who will use this permission set'. It asks 'Who will use this permission set?' and provides three options: '-Choose -None-' (if you plan to assign it 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.', and 'Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.' A note says 'Not sure what a permission set license is? Learn more here.' A dropdown for 'License' is set to '-None--'. Buttons for 'Save' and 'Cancel' are at the bottom.

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

- Header:** Includes a cloud icon, "Setup", "Home", "Object Manager", a search bar ("Search Setup"), and various navigation icons.
- Left Sidebar:** A navigation menu with sections like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-sections for Users, Permission Set Groups, and Permission Sets), Data, Email, and PLATFORM TOOLS.
- Current Page:** "Permission Sets" under "Object Settings".
- Content Area:** Displays a table of object permissions for the "permission" permission set. The table includes columns for Object Name, Object Permissions (e.g., No Access), Total Fields, and Tab 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	--

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

- Header:** Includes a cloud icon, "Setup", "Home", "Object Manager", a search bar ("Search Setup"), and various navigation icons.
- Left Sidebar:** A navigation menu with sections like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-sections for Users, Permission Set Groups, and Permission Sets), Data, Email, and PLATFORM TOOLS.
- Current Page:** "Permission Sets" under "Object Settings".
- Content Area:** Displays the "Childs" tab settings. It includes a "Tab Settings" section with "Available" and "Visible" columns, and a "Object Permissions" section listing permissions like Read, Create, Edit, Delete, View All, and Modify All.

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"/>

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar includes links for Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with a 'Users' section), and Platform Tools. The main content area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'A_User' (alias ua, username ua04@gmail.com, role CEO, active, profile Standard Platform User), 'B_User' (alias ub, username ub5@gmail.com, role VP_Marketing, active, profile Custom Sales Profile), 'Chatter Expert' (alias chaner, username chaner.005h000008k0ceay, role Chatter Free User), 'D_DHANUSHYA' (alias dd, username ddan@caanmuthavan.com, role System Administrator), 'User_Integration' (alias integ, username integration@005h000008k0ceay.com, role Analytics Cloud Integration User), and 'User_Security' (alias sec, username insightssecurity@005h000008k0ceay.com, role Analytics Cloud Security User). Navigation links A through Z and All are at the top and bottom of the table.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. The left 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, Administration (with a 'Users' section), and Platform Tools. The main content area shows configuration options for setting expiration dates. It includes radio buttons for 'No expiration date' (selected) and 'Specify the expiration date', with sub-options for 1 Day, 1 Week, 30 Days, 60 Days, and Custom Date. A dropdown menu for Time Zone is also present. Below these settings, a table titled 'Selected Users' lists a single user named 'Dhanushya D' with details: Full Name (Dhanushya D), Role (chan), Profile (Standard Platform), Active (✓), User License (Salesforce Platform), and Expires On (Never Expires).

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users), and Data. The main content area is titled "Assignment Summary" under "permission". It displays a table with one row for "Dhanushya D" assigned to "Salesforce Platform" with a status of "Success". A green banner at the top right indicates "1 assignments were successful.".

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-links for Users, Permission Set Groups, and Permission Sets), and Data. The main content area is titled "Permission Sets" under "SETUP". It displays a table listing various objects and their access levels. The table includes columns for object name, access level (e.g., No Access, 26, 6, 14, 15, 33, 4, 18, 24, 30, 6, 1, 20, 41, etc.), and counts. The "Permission Sets" link in the sidebar is highlighted.

Object	Access Level	Count
Operating Hours Holidays	No Access	/
Opportunities	No Access	26
Opportunity_Contact_Role	No Access	6
Opportunity_Product	No Access	14
Order_Products	No Access	15
Orders	No Access	33
Parents	No Access	4
Party_Contracts	No Access	18
Payment_Authorization_Adjustments	No Access	24
Payment_Authorizations	No Access	30
Payment_Gateway_Logs	No Access	--
Payment_Gateways	No Access	6
Payment_Groups	No Access	1
Payment_Line_Invoices	No Access	20
Payments	No Access	41
Pending_Order_Summaries	No Access	--
Pending_Order_Summary_Processed_Events	No Access	--
Price_Book_Entry	No Access	9
Price_Books	No Access	6
Privacy_Contracts	No Access	--
Problem_Related_Items	No Access	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	No Access	3
Product_Attribute_Set_Products	No Access	2

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

- Left Sidebar:** Includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets), Data, Email, and Platform Tools (Subscription Management).
- 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, including links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets), Data, Email, and Platform Tools (Subscription Management).
- 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 under the 'Users' tab. The left sidebar includes links for 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, and User Management Settings. The main content area is titled 'All Users' and displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table lists several users, each with a checkbox for Action, their name, alias, and email, their assigned role (e.g., CEO, VP_Marketing, Standard Platform User, etc.), and whether they are active or not. The profiles listed include Standard Platform User, Custom Sales Profile, Charter Free User, System Administrator, Analytics Cloud Integration User, and Analytics Cloud Security User. Navigation links at the bottom allow for letter-based filtering (A-Z) and a 'All' link.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A_User	ua	ua04@gmail.com	CEO	✓	Standard Platform User
<input type="checkbox"/> Edit	B_User	ub	ub5@gmail.com	VP_Marketing	✓	Custom Sales Profile
<input type="checkbox"/> Edit	Charter Export	Chatter	chatty_0005h0000008a0cecaay.tudvinatopa4@charter.salesforce.com		✓	Charter Free User
<input type="checkbox"/> Edit	D_DHANUSHYA	DD	dan@naamnudhulan.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dfh0000008a0cecaay.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@0005h0000008a0cecaay.com		✓	Analytics Cloud Security User

Cloud icon

Setup Home Object Manager

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

> Data

> Email

PLATFORM TOOLS

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

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

SETUP Profiles

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

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

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

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

Cloud icon

Setup Home Object Manager

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

> Data

> Email

PLATFORM TOOLS

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

SETUP Profiles

Clone Profile

Enter the name of the new profile.

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

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

Save Cancel

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and includes sections for Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. Under 'Users', 'Profiles' is selected. The main content area is titled 'SETUP Profiles' and shows the 'Profile dhanu'. It lists various permissions and settings for this profile. A 'Help for this Page' link is at the top right.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and includes sections for Home, Object Manager, and a search bar. Under 'Users', 'Profiles' is selected. The main content area is titled 'SETUP Profiles' and shows the 'Page Layouts' section for the 'user' profile. It displays a table of standard object layouts, each with a 'View Assignment' link. A tooltip for the 'Alternative Payment Method' row indicates it is assigned to the 'Standard Platform User ~ Salesforce - Developer Edition' profile.

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, the navigation bar includes links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and various Administration sections. The main content area displays the 'Profiles' setup page. It features two large tables for 'Basic Access' and 'Data Administration' permissions across categories such as Brokers, Childs, Parents, and Properties. Below these are sections for 'Session Settings' (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login: None) and '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, and Don't immediately expire links in forgot password emails). At the bottom are Save, Save & New, and Cancel buttons.

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar has the same navigation as the previous screen. The main content area shows the 'Profile Edit' page for the 'dhanu' profile. It includes fields for Name (dhanu), User License (Salesforce), and Description. A 'Custom Profile' checkbox is checked. The 'Custom App Settings' section lists various tabs and components with checkboxes for 'Visible' and 'Default'. A note indicates that a red asterisk (*) means Required Information. The required fields are Sales (standard_LightningSales), Sales Console (standard_LightningSalesConsole), and Salesforce Chatter (standard_Chatter).

knowledgeinstituteoftech-9d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

All Users

This page allows you to 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	ua4@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
Edit	B_User	ub	ub5@gmail.com	VP_Marketing	<input checked="" type="checkbox"/>	Custom_Sales_Profile
Edit	Chatter_Expert	Chatter	chatty.0005h0000008k0ceay.fudvinxtopaa@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
Edit	D_DHANUSHYA	DD	dan@haanmudhalvan.com	System Administrator	<input checked="" type="checkbox"/>	
Edit	User_Integration	integ	integration@005h000008k0ceay.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
Edit	User_Security	sec	insightssecurity@0005h0000008k0ceay.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	

[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 | [All](#)

[Prompt & Walkthrough Tips](#)

knowledgeinstituteoftech-9d-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

User DHANUSHYA D

User Profile Help for this Page

Permission Set Assignments | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Membership | Queue Membership | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Log History | User Provisioning Accounts

User Detail

Name	DHANUSHYA D	Role	Salesforce
Alias	DD	User License	System Administrator
Email	2k20cats04@kiot.ac.in [Verified]	Profile	System Administrator
Username	dan@haanmudhalvan.com	Active	<input checked="" type="checkbox"/>
Nickname	User16969132458766216150	Marketing User	<input checked="" type="checkbox"/>
Title	Knowledge Institute of Technology	Offline User	<input checked="" type="checkbox"/>
Company	Knowledge Institute of Technology	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division	IN	Service Cloud User	<input checked="" 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"/> View
Delegated Approver		Data.com User Type	<input type="checkbox"/> i
Manager	Only if I am an approver	Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails		Debug Mode	<input type="checkbox"/> i
Federation ID		High Contrast Palette on Charts	<input type="checkbox"/> i
App Registration: One-Time Password Authenticator	[Connect] i	Load Lightning Pages With	Prompt & Walkthrough Tips

Type here to search

26°C Partly sunny ENG 8:48:55 PM IN 10/19/2023

User Edit
DHANUSHYA D

General Information

First Name	DHANUSHYA	Role	<None Specified>
Last Name	D	User License	Salesforce
Alias	DD	Profile	System Administrator
Email	2k20csbs04@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	dan@naanmudhalvan.com	Marketing User	<input checked="" type="checkbox"/>
Nickname	User169691324587662161	Offline User	<input checked="" type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	Knowledge Institute of Tech	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input checked="" 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"/>

Admin Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Prakasam, Shamyutha	SPrak	shamyutha@naanmudhalvan.com		<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 with the following details:

- Setup Home**: The current page is "Permission Sets".
- Object Manager**: A dropdown menu is open.
- Permission Set**: The name is "permission01".
- Actions**: Buttons for **Find Settings...**, **Clone**, **Delete**, **Edit Properties**, and **Manage Assignments**.
- Permission Set Overview**: Shows the current object settings and the selected **Accounts** object.
- Accounts**: The selected object.
- Object Permissions**: A table showing permissions for the Accounts object.

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>
- Field Permissions**: A table showing permissions for specific fields of the Accounts object.

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:

- Setup Home**: The current page is "Permission Sets".
- Object Manager**: A dropdown menu is open.
- Permission Set**: The name is "permission01".
- Actions**: Buttons for **Find Settings...**, **Clone**, **Delete**, **Edit Properties**, and **Manage Assignments**.
- Permission Set Overview**: Shows the current object settings and the selected **Accounts** object.
- Accounts**: The selected object.
- Object Permissions**: A table showing 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"/>
- Field Permissions**: A table showing permissions for specific fields of the Accounts object.

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. On the left, the navigation sidebar includes links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, and Public Groups). The main content area displays a configuration page for assigning a permission set. It has sections for 'No expiration date' (selected), 'Specify the expiration date' (with options for 1 Day, 1 Week, 10 Days, 60 Days, or Custom Date), and 'Time Zone' (with a dropdown menu to 'Select a time zone...'). Below these is a table titled 'Selected Users' with columns: Full Name, Role, Profile, Active, User License, and Expires On. Two users, both named 'Dhanushya D' and assigned the 'chan' profile, are listed. Both have 'Active' checked, 'Salesforce Platform' as the User License, and 'Never Expires' as the Expires On date. A 'Quick Find' bar at the top contains a search field and a 'Search Setup' button.

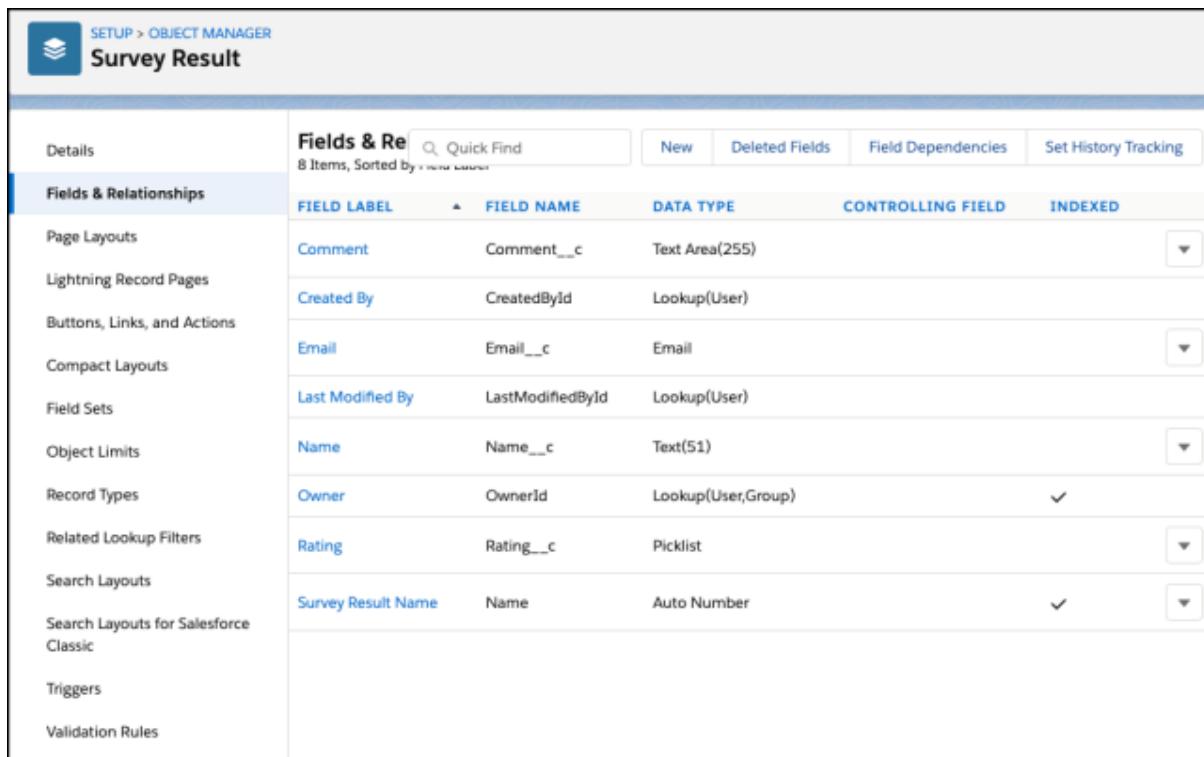
This screenshot shows the same Salesforce Setup interface after the assignment was completed. A green success message banner at the top center states '2 assignments were successful.' and 'permission01'. Below this, the 'Assignment Summary' table shows the same two users from the previous screen, with their status listed as 'Success' in the 'Status' column. The rest of the interface and sidebar are identical to the first screenshot.

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.



Fields & Relationships					
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
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Step 3: Create an Email Alert

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

8.Click Save.

Survey - Thank You Email

Description: Survey - Thank You Email

Unique Name: Survey_Thank_You_Email

Object: Survey Result

Email Template: Thank You Email - Survey

Protected Component:

Recipient Type: Search: User for:

Recipients:

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

Add Remove

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

Additional Emails

From Email Address: Current User's email address

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

Save Save & New Cancel

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

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

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

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

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row3:

Field: Name__c

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

Click Add Row

Row 3:

Field: Rating__c

Value: {!Rating}

7.Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

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

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

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

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

5.Click Done.

Edit "Survey - Thank You Email" email alert

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

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

Set Input Values

A3 * Record ID

{!Save_Response}

Save as

A New Version A New Flow

* Flow Label Survey * Flow API Name Survey

Description

Hide Advanced

How to Run the Flow User or System Context—Depends on How Flow is Launched

* Type Screen Flow

* API Version for Running the Flow 51

Interview Label Insert a resource... Survey {!\$Flow.CurrentDateTime}

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

Status: Active Type: Screen Flow Version Number: 2

Cancel Save

Step 5: Create a Lightning Application to Render Lightning Runtime for Flow in a Visualforce Page

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

- 1.Click Setup | Developer Console
- 2.Navigate to File | New | Lightning Application
- 3.Enter a Name (VFPageToLC) field, make sure to select the Lightning Out Dependency App checkbox.
- 4.Click Submit.
- 5.Copy code from GitHub and paste it into your Lightning Application.
- 6.Save your code.

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

VFPageToLC.app *

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

Logs, Tests, and Problems

```

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

```

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

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

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

Site Edit

Save **Cancel**

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

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

Proof of Concept

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

Survey

Name

First Name

Alok

Last Name

Sinfal

*Email

[REDACTED]

*Rating

5

*Comment

Awesome Blog



Next



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

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row 3:

Field: Name__c

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

Click Add Row

Row 3:

Field: Rating__c

Value: {!Rating}

Click Done.