

NAAN MUDHALVAN

Salesforce Developer(Course)

Assignment no 1

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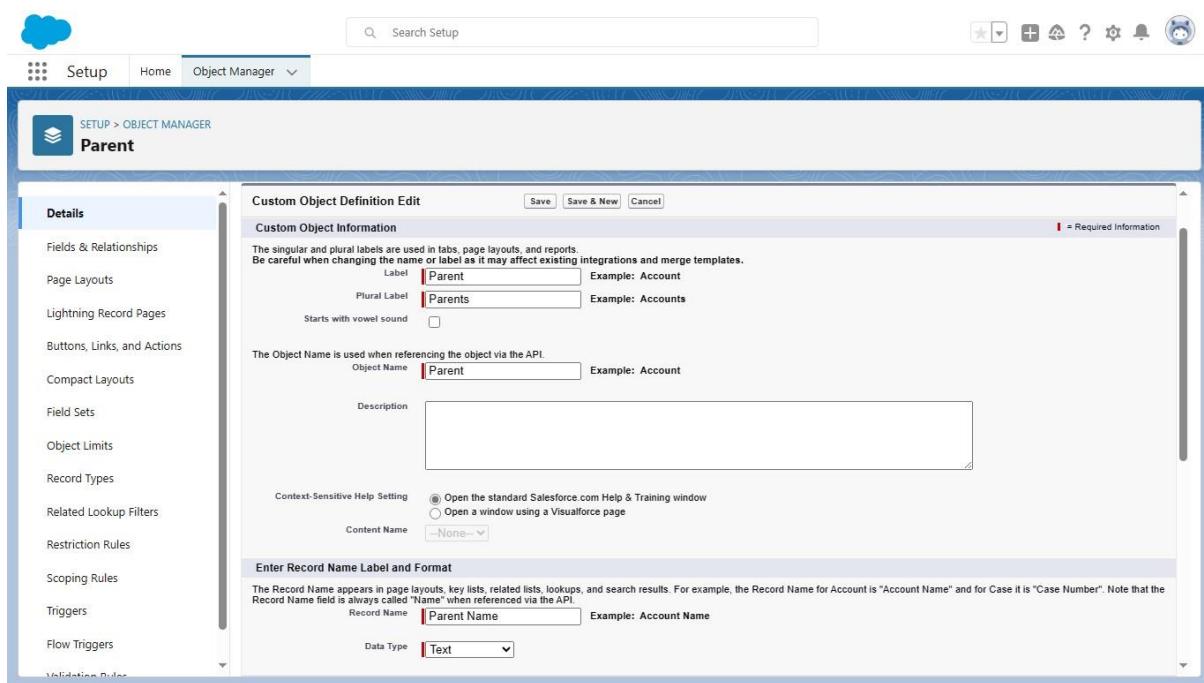
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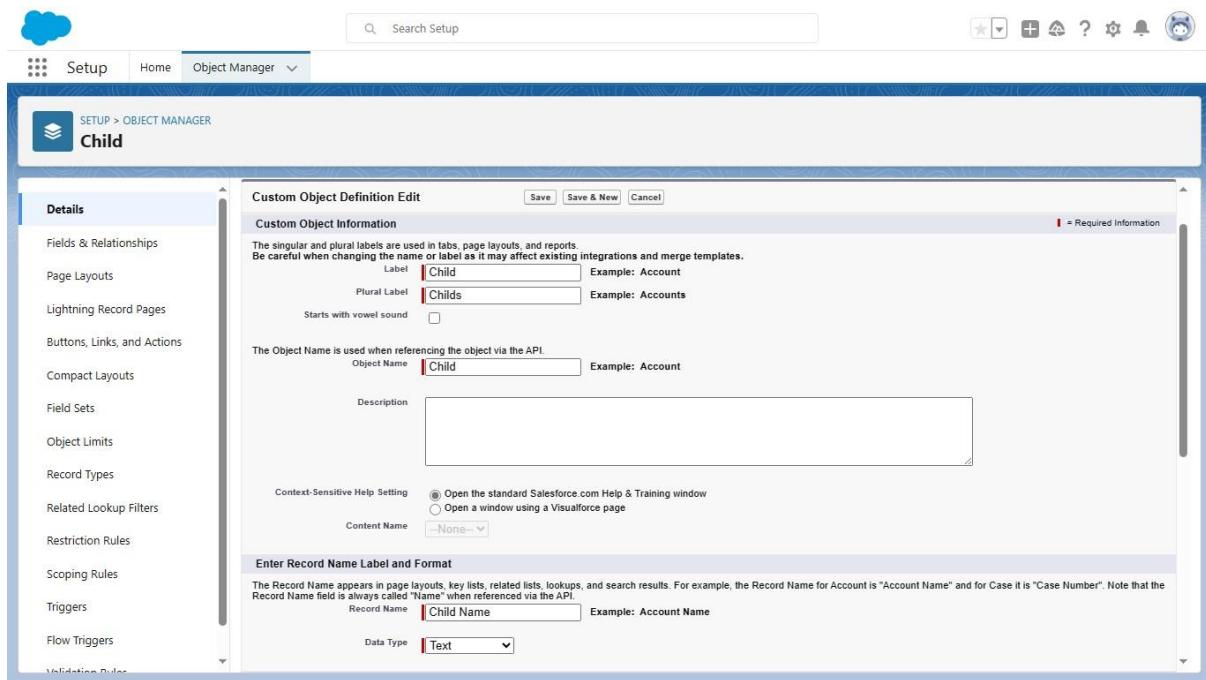
Batch : 2024

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.





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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup' and a toolbar has icons for star, plus, question mark, etc. The main area is titled 'SETUP > OBJECT MANAGER Parent'. On the left, a sidebar lists 'Fields & Relationships' and other setup items like Page Layouts, Lightning Record Pages, etc. The right pane is titled 'Fields & Relationships' with a sub-header '4 Items, Sorted by Field Label'. It contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows are:

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

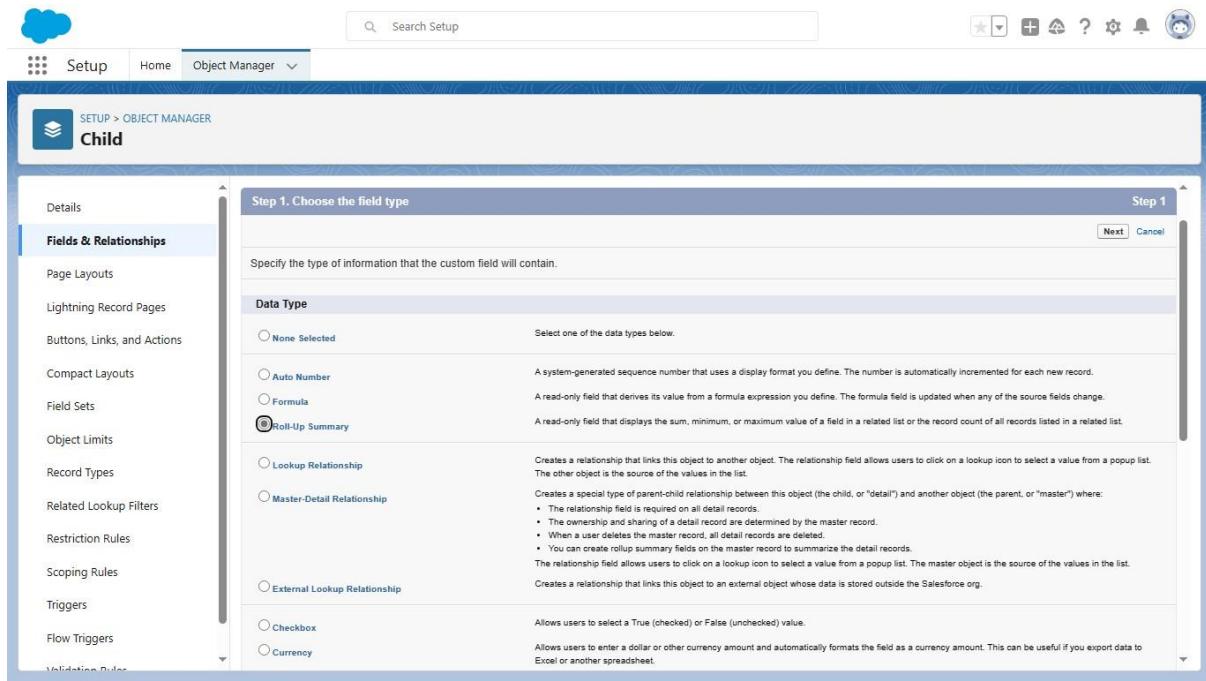
The screenshot shows the 'New Custom Field' wizard for the Parent object. The top navigation bar and sidebar are identical to the previous screenshot. The main area is titled 'Parent New Custom Field'. Step 1, 'Choose the field type', is displayed. It asks 'Specify the type of information that the custom field will contain.' The 'Data Type' section shows several options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship', 'Master-Detail Relationship' (selected), and 'External Lookup Relationship'. Each option has a detailed description below it. Buttons for 'Next' and 'Cancel' are at the bottom right of the step panel.

The screenshot shows the Salesforce Setup interface for creating a new relationship. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Parent' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships (which is selected). The main content area is titled 'New Relationship' and is currently on 'Step 2. Choose the related object'. It shows a dropdown menu set to 'Child'. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface for the 'Child' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Child' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Fields & Relationships (which is selected). The main content area is titled 'Fields & Relationships' and displays a table of fields:

| 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) | | |

Navigation buttons at the bottom right include 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and '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 note says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section has a 'New' and 'What Is This?' link. The 'Custom Object Tabs' section shows a table with four rows:

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

The 'Web Tabs' section says 'No Web Tabs have been defined'. The 'Visualforce Tabs' section says 'No Visualforce Tabs have been defined'. The 'Lightning Component Tabs' section says 'No Lightning component tabs have been defined'. The 'Lightning Page Tabs' section has a table with one row:

| Action | Label | Tab Style | Description |
|--------|-------|-----------|-------------|
| | | | |

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

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

The screenshot shows the Salesforce Setup interface with the 'Lightning Experience App Manager' selected in the sidebar. The main area displays a list of existing apps, and below it, the 'New Lightning App' creation interface.

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, 11:15 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:
- Parent Details:
- *Developer Name: User A
- Description: Enter a 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

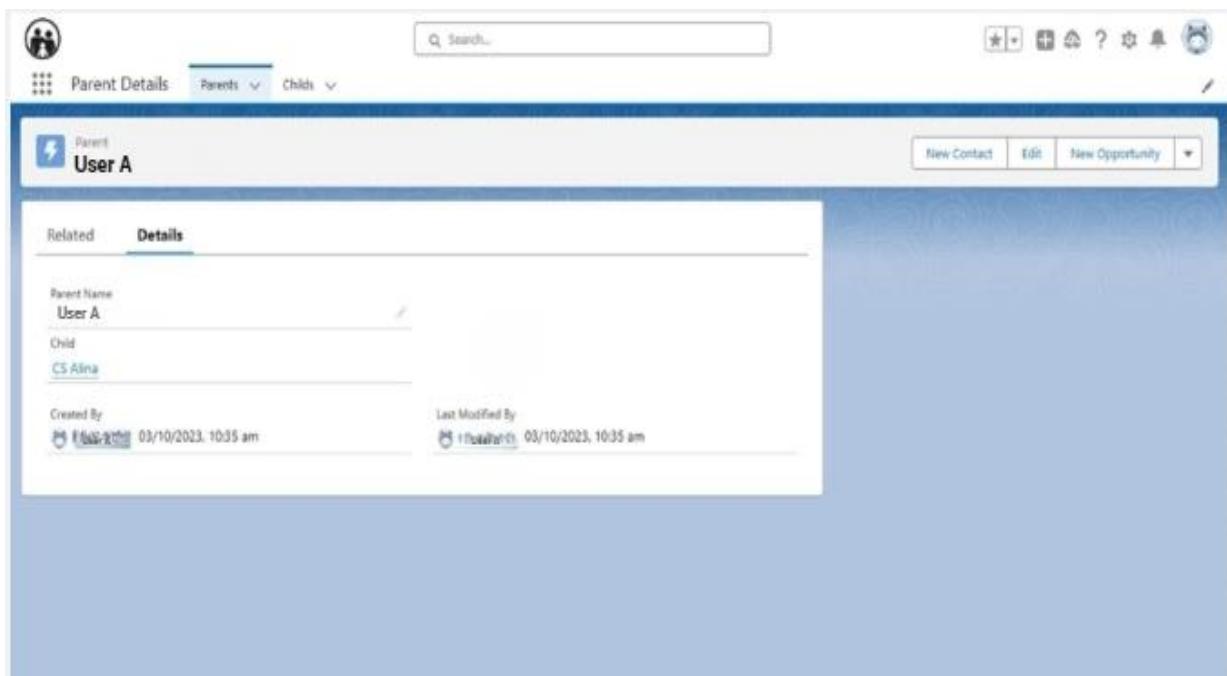
App Launcher Preview

Progress: 1 / 10

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

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

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



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

Step 1: Create a Public Group

- 1. Go to "Setup" in Salesforce.**
- 2. In the Quick Find box, type "Public Groups" and select it.**

3. Click on "New Public Group."

4. Create a group for User A, let's call it "UserA_Group," and add User A to this group.

5. Create another group for User B, let's call it "UserB_Group," and add User B to this group.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. On the left, the navigation menu is expanded to show 'Users' and 'Profiles'. The main content area displays the 'Profile Edit' screen for a profile named 'Manager'. The 'Custom App Settings' section is visible, showing settings for various custom applications like Analytics Studio, App Launcher, and Dreamhouse. The 'Service Provider Access' section is also partially visible. At the bottom right of the main window, there is a note: 'Required Information' indicated by a red asterisk (*).

This screenshot shows the same Salesforce Setup interface as the previous one, but with more sections expanded. The 'Custom Object Permissions' section is now visible, showing detailed access controls for various objects. Below it, the 'Session Settings' section is expanded, showing session timeout and security level requirements. The 'Password Policies' section is also expanded, displaying password complexity rules. The left sidebar remains the same, showing the expanded 'Users' and 'Profiles' sections.

Step 2: Create Criteria-Based Sharing Rules

For User A:1. Go to "Setup" in Salesforce.

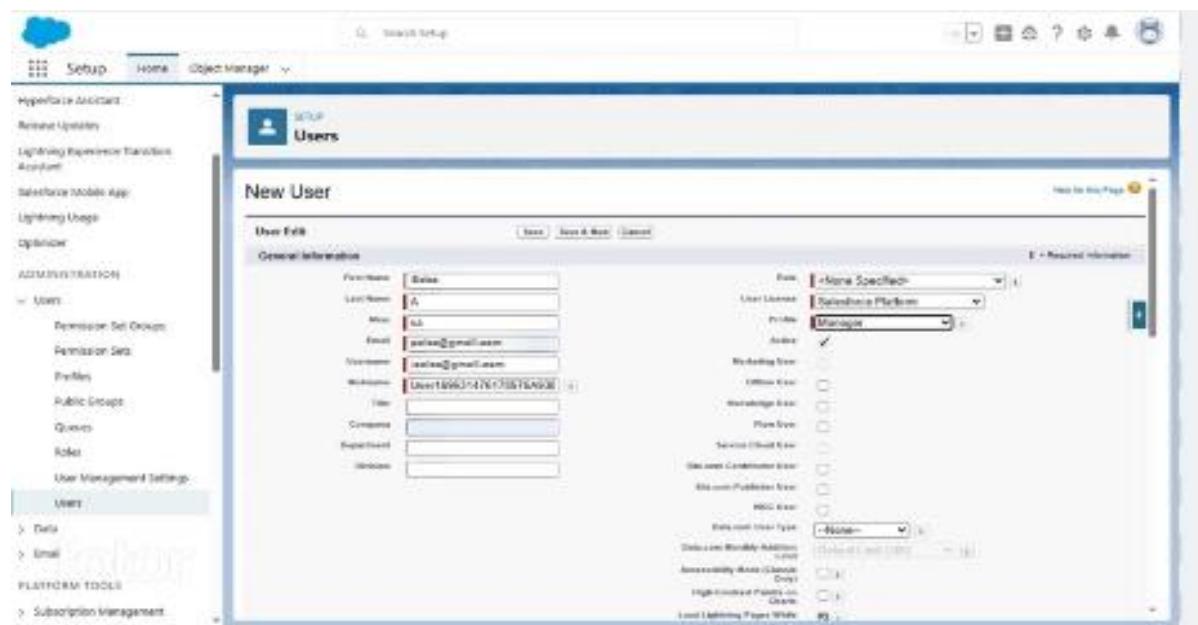
2. In the Quick Find box, type "Sharing Rules" and select "Sharing Settings."

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.



Home | Salesforce

https://knowledgeinstituteoftechn12-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Cloud Setup Center

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

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

Users

Data

Email

Search

Chatter

User Integration

User Security

y_hema

v_shree

Venkatesan_Hemashree

Chatter Free User

Analytics Cloud Integration User

Analytics Cloud Security User

Partner App Subscription User

System Administrator

All Users

New User Reset Password(s) Add Multiple Users

Action Full Name Alias Username Role Active Profile

| Action | Full Name | Alias | Username | Role | Active | Profile |
|--------------------------|----------------------|---------|--|---------------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> | Chatter Free User | Chatter | chatty005@00000dtfinhead1vcyvluao7%@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> | User Integration | integ | integration@00d5@00000dtfinhead.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> | User Security | sec | insightssec@00d5@00000dtfinhead.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |
| <input type="checkbox"/> | y_hema | hy | hemar2@gmail.com | VP_Marketing | <input checked="" type="checkbox"/> | Partner App Subscription User |
| <input type="checkbox"/> | v_shree | sv | shrihari5@gmail.com | SVP_Human Resources | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | Venkatesan_Hemashree | HVenk | hemashree@naanmudhalvan.com | | | |

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

ENG IN 1006 19-10-2023

https://mail.google.com/mail/u/0/?tab=rm&ogbl#search/salesforce/FMfcgzGtxSImNrlqCMWMZrxGdSCKPtC

Gmail

Compose

Inbox 6.69%

Starred

Snoozed

Sent

Drafts 28

More

Labels +

Thanks for signing up with Salesforce!

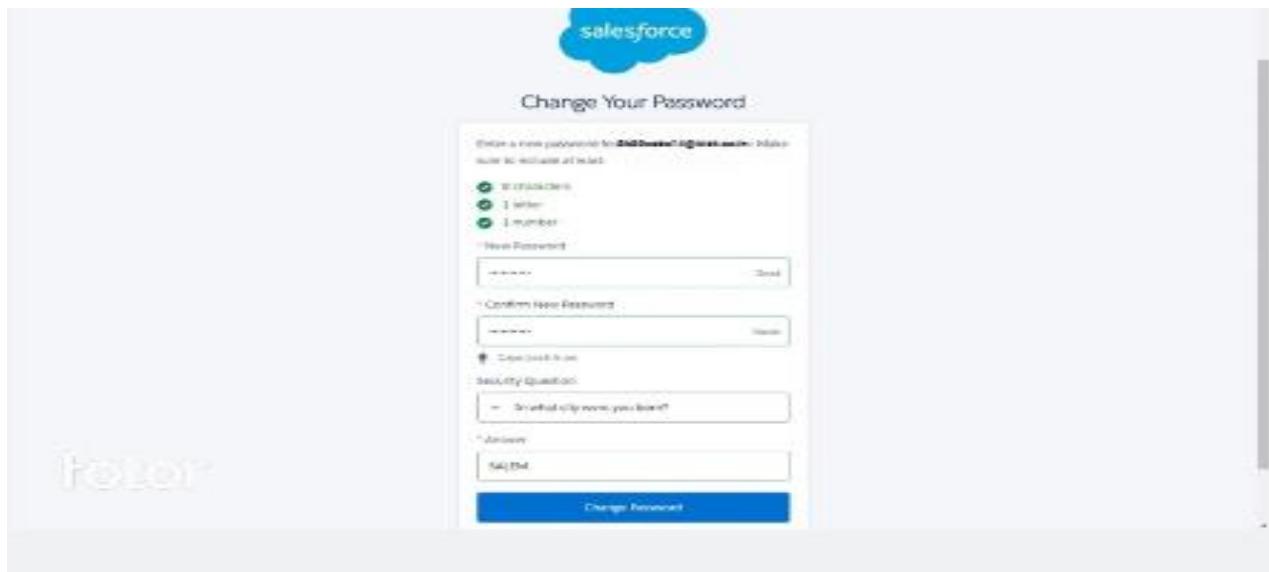
Click below to verify your account.

Verify Account

To easily log in later, save this URL:
<https://knowledgeinstituteoftechn12-dev-ed.my.salesforce.com>

Username:
hemashree@naanmudhalvan.com

Again, welcome to Salesforce!



The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and includes sections for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The 'Profiles' section is currently selected and highlighted in blue. The main content area is titled 'Profiles' and shows a 'Profile Edit' screen for the profile 'Bmanager'. The profile details include 'Name: Bmanager', 'User License: Salesforce Platform', and 'Custom Profile' checked. The 'Custom App Settings' section lists several app settings with checkboxes for 'Visible' and 'Default'. The 'Service Provider Access' and 'Tab Settings' sections are also visible. At the bottom, there are tabs for 'Standard Tab Settings' (selected), 'Home', 'Default On', and 'Learning'.

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.**

Step 3: Assign Records Ownership

Permission Set Create

Enter permission set information

| | |
|-----------------------------|--------------------------|
| Label | permission |
| API Name | permission |
| Description | (empty) |
| Session Activation Required | <input type="checkbox"/> |

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-

Save Cancel

Permission Set permission

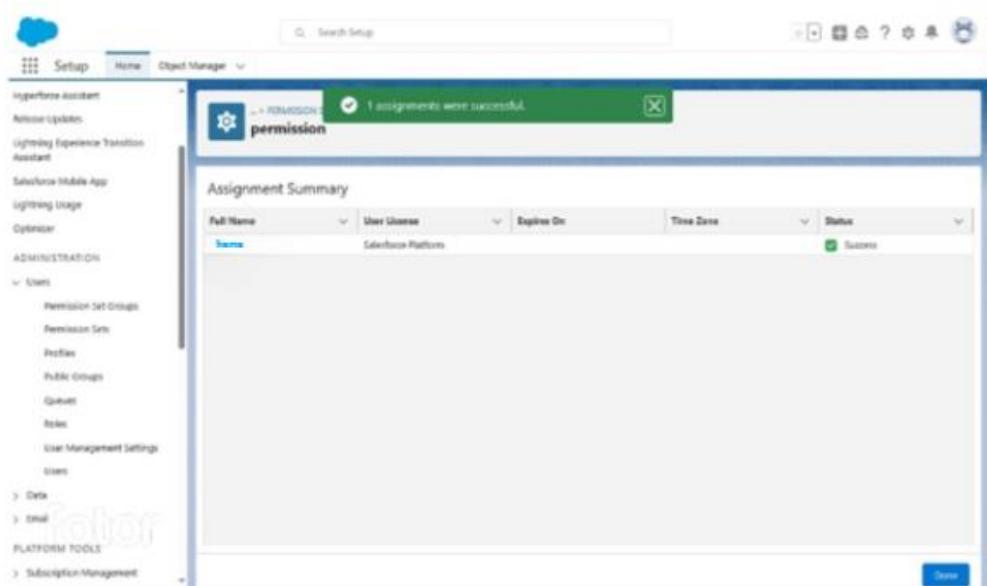
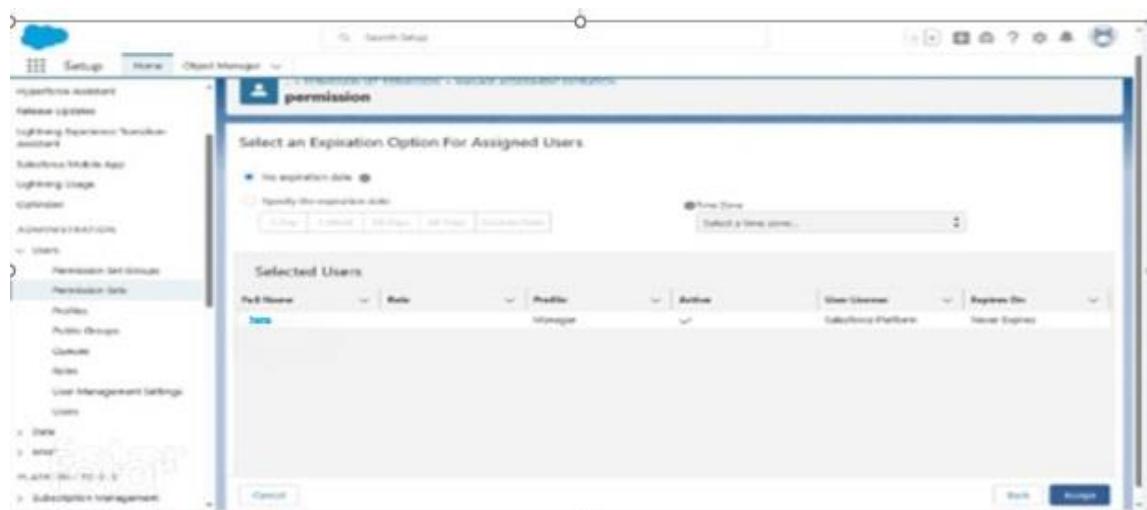
Object Settings

| 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 Invites | -- | 4 | -- |
| Appointment Schedule Aggregates | No Access | -- | -- |
| Appointment Schedule Log | No Access | -- | -- |
| Appointment Topic Time Slots | No Access | 6 | -- |
| Asset Actions | No Access | 30 | -- |
| Asset Action Sources | -- | 10 | -- |
| Asset Relationships | No Access | 42 | -- |
| Assets | No Access | 11 | -- |
| Asset State Periods | No Access | -- | -- |

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main area displays the 'permission' permission set. The 'Object Permissions' section is visible, showing various permissions like Read, Create, Edit, Delete, View All, and Modify All, all of which are checked. The 'Field Permissions' section is also present.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. A search bar at the top has 'user' typed into it. The results table shows several permission sets, including 'Buyer', 'Buyer Manager', 'C360 High Scale Flow Integration User', 'CRM User', 'Commerce Admin', and 'Contact Center Admin'. The 'User Management Settings' category is selected in the sidebar.

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



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

- Left Navigation Bar:**
 - Hyperforce Assistant
 - Release Updates
 - Lightning Experience Transition Assistant
 - Salesforce Mobile App
 - Lightning Usage
 - Optimizer
 - ADMINISTRATION**
 - Users
 - Permission Set Groups
 - Permission Sets**
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
 - Users
 - Data
 - Email
 - PLATFORM TOOLS
 - Subscription Management
- Top Bar:** Search Setup, Home, Object Manager
- Page Header:** SETUP, Permission Sets
- Table:** A list of permission sets and their access levels. The table includes columns for object name, access level, and counts.

| Object | Access Level | Count |
|--|--------------|-------|
| Operating Hours Holidays | No Access | 26 |
| Opportunities | No Access | 6 |
| Opportunity Contact Role | No Access | 14 |
| Opportunity Product | No Access | 15 |
| Order Products | No Access | 33 |
| Orders | No Access | 4 |
| Parents | No Access | 18 |
| Party Consents | No Access | 24 |
| Payment Authorization Adjustments | No Access | 30 |
| Payment Authorizations | No Access | 6 |
| Payment Gateway Logs | No Access | 1 |
| Payment Gateways | No Access | 20 |
| Payment Groups | No Access | 41 |
| Payment Line Invoices | No Access | .. |
| Payments | No Access | .. |
| Pending Order Summaries | No Access | .. |
| Pending Order Summary Processed Events | No Access | .. |
| Price Book Entries | No Access | 9 |
| Price Books | No Access | 6 |
| Privacy Consents | 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 Navigation Bar:** Same as the first screenshot.
- Top Bar:** Search Setup, Home, Object Manager
- Page Header:** SETUP, Permission Sets
- Form:** A detailed edit form for a Permission Set named "permission". It includes sections for Parents, Tab Settings, Object Permissions, and Field Permissions.

Parents: Shows a list of available parents with checkboxes for selection. One item is selected.

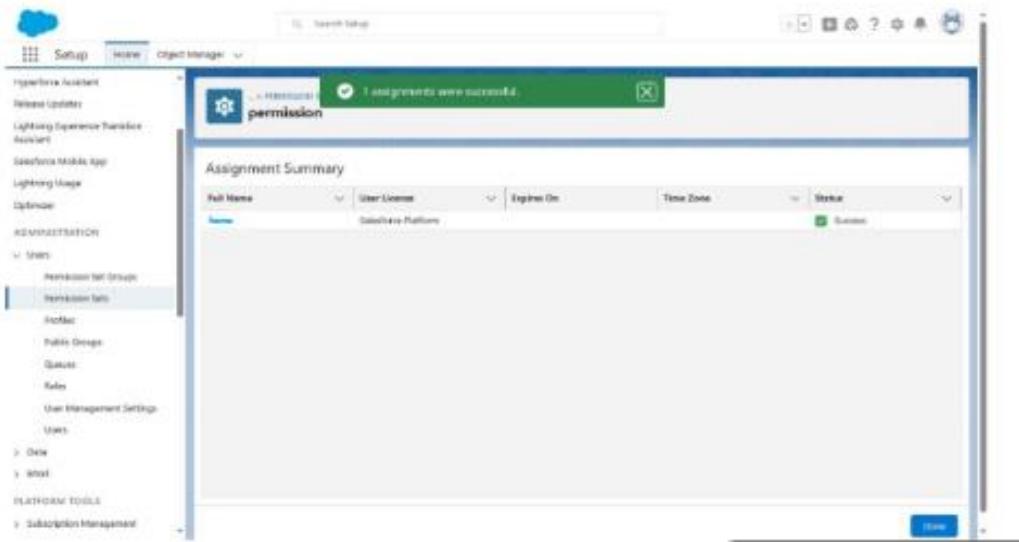
Tab Settings: Shows a table with columns Available and Visible. One item is selected.

Object Permissions: Shows a table with columns Permission Name and Enabled. Most permissions have checkboxes checked.

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

Field Permissions: Shows a table with columns Field Name, Read Access, and Edit Access. Both columns have checkboxes.

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



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

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.**

Users | Salesforce

<https://knowledgeinstituteoftechn12-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home>

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 |
|----------------------|----------------------|---------|---|---------------------|-------------------------------------|----------------------------------|
| Edit | Chatter_Pinger | Chatter | chatty_00050000000000thead_rvcvirtual075@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| Edit | User_Integration | integ | integration@00d5c000000000thead.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| Edit | User_Security | sec | instithitssecurity@00d50000000000thead.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |
| Edit | y_hema | hy | hemad2@gmail.com | VP_Marketing | <input checked="" type="checkbox"/> | Partner App Subscription User |
| Edit | v_shree | sv | shreeta@gmail.com | SVP_Human_Resources | <input checked="" type="checkbox"/> | Partner App Subscription User |
| Edit | Venkatesan_Hemashree | HVenk | hemashrees@naanmuthalavan.com | | <input checked="" type="checkbox"/> | System Administrator |

[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

https://knowledgeinstituteoftechn12-dev-ed.develop.lightning.force.com/one/app#/setup/

Search ENG IN 10:08 19.10.2023

Setup Home Object Manager

SETUP Profiles

Profiles

All Profiles | [Edit](#) | [Delete](#) | [Create New View](#)

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

1-25 of 41 | 0 Selected | [Previous](#) [Next](#)

Page 1 of 2

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

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main content area displays the 'Profiles' page under the 'SETUP' tab. A modal window titled 'Clone Profile' is open, prompting the user to enter a new profile name ('Manager') based on an existing profile ('Standard Platform User'). The 'User License' is set to 'Salesforce Platform'. The 'Save' button is visible at the bottom of the modal.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing various categories like 'Optimizer', 'ADMINISTRATION', 'Users', 'Data', 'Email', 'PLATFORM TOOLS', etc. The 'Profiles' section is selected. The main content area displays the 'Profile Detail' page for the 'Edu' profile. The profile details include: Name (Edu), User License (Salesforce Platform), Description (empty), Created By (JAYASHREE_A) on 18/10/2023, 9:06 am, and Modified By (JAYASHREE_A) on 18/10/2023, 9:06 am. The 'Custom Profile' checkbox is checked. Below the profile detail, there is a 'Page Layouts' section showing 'Standard Object Layouts'.

Page Layouts

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

Basic Access

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

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 (checkboxes)
- Require a minimum 1 day password lifetime (checkboxes)
- Don't immediately expire links in forgot password emails (checkboxes)

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area displays the 'Profiles' section under the 'Users' category. A search bar at the top right contains the text 'Search Setup'. The top navigation bar includes icons for Home, Object Manager, and various system settings.

Profile Edit: Edu

Set the permissions and page layouts for this profile.

Profile Edit

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

Profile Edit: Edu ~ Salesforce - Developer Edition

Custom App Settings

| | Visible | Default | Visible | Default |
|--|-------------------------------------|----------------------------------|-------------------------------------|----------------------------------|
| Analytics Studio (standard__Insights) | <input type="checkbox"/> | <input checked="" type="radio"/> | <input checked="" type="checkbox"/> | <input checked="" type="radio"/> |
| App Launcher | <input type="checkbox"/> | <input checked="" type="radio"/> | <input type="checkbox"/> | <input checked="" type="radio"/> |
| Platform (standard__Platform) | <input checked="" type="checkbox"/> | <input checked="" type="radio"/> | | |
| WDC (standard__Work) | <input type="checkbox"/> | <input checked="" type="radio"/> | | |

! = Required Information

Salesforce Setup Home Object Manager

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"/> | Chatter_Friend | Chatter | chatty005@000000000000007%@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> | User_Integration | integ | integration@00d5@000000000000007%@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> | User_Security | sec | insightssec@005@000000000000007%@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |
| <input type="checkbox"/> | y_hema | hv | hema02@gmail.com | VP_Marketing | <input checked="" type="checkbox"/> | Partner App Subscription User |
| <input type="checkbox"/> | v_shree | sv | shriee15@gmail.com | SVP_Human_Resources | <input checked="" type="checkbox"/> | Partner App Subscription User |
| <input type="checkbox"/> | Venkatesan_Hemashree | HVenk | hemashree@naanmuthalvan.com | | <input checked="" type="checkbox"/> | System Administrator |

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

https://knowledgeinstituteoftechn12-dev-ed.develop.lightning.force.com/o/one/app#/setu...

ENG IN 10:08 19-10-2023

Salesforce Setup Home Object Manager

Users

User Edit hema v

User Edit

General Information

| | | | |
|------------|------------------------|-----------------------------------|-------------------------------------|
| First Name | hema | Role | VP_Marketing |
| Last Name | v | User License | Partner App Subscription |
| Alias | hv | Profile | Partner App Subscription User |
| Email | hema@gmail.com | Active | <input checked="" type="checkbox"/> |
| Username | hema02@gmail.com | Marketing User | <input type="checkbox"/> |
| Nickname | User109630820047183583 | Offline User | <input type="checkbox"/> |
| Title | | Knowledge User | <input type="checkbox"/> |
| Company | | Flow User | <input type="checkbox"/> |
| Department | | Service Cloud User | <input type="checkbox"/> |
| Division | | Site.com Contributor User | <input type="checkbox"/> |
| | | Site.com Publisher User | <input type="checkbox"/> |
| | | WIC User | <input type="checkbox"/> |
| | | Data.com User Type | -None- |
| | | Data.com Monthly Addition Limit | 300 |
| | | Accessibility Mode (Classic Only) | <input type="checkbox"/> |
| | | High-Contrast Palettes on Charts | <input type="checkbox"/> |

Save | Save & New | Cancel

Required Information

https://knowledgeinstituteoftechn12-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005j0000009lx5X%2F%3FisUserEntityOverride%3D1%26reURL%...

ENG IN 10:08 19-10-2023

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main window displays the 'User Edit' screen for a user named 'hema v'. The 'General Information' section contains fields for First Name ('hema'), Last Name ('v'), Alias ('hv'), Email ('hema@gmail.com'), Username ('hema02@gmail.com'), Nickname ('User169630820047183583'), Title (empty), Company (empty), Department (empty), and Division (empty). To the right, there are sections for 'Role' (set to 'VP, Marketing'), 'User License' (set to 'Partner App Subscription'), 'Profile' (set to 'Partner App Subscription User'), and 'Active' status (checked). Below these are various user type checkboxes: Marketing User (unchecked), Offline User (unchecked), Knowledge User (unchecked), Flow User (unchecked), Service Cloud User (unchecked), Site.com Contributor User (unchecked), Site.com Publisher User (unchecked), WDC User (unchecked), and Data.com User Type (set to 'None'). At the bottom, there are fields for 'Data.com Monthly Addition Limit' (set to 300) and 'Accessibility Mode (Classic Only)' (unchecked). The top navigation bar includes links for Home, Object Manager, and Search Setup. The bottom taskbar shows the Windows Start button, a search bar, and several pinned application icons.

The screenshot shows the Salesforce Admin Users page. The left sidebar is titled 'Setup' and includes sections for Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and various User management options like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and the current 'Users' section. The main content area has a header 'SETUP' and 'Users'. Below it, a sub-header says 'Admin Users' with a note: 'On this page you can create, view, and manage users.' A link 'To get more licenses, use the Your Account app. Let's Go' is present. The main table lists one user: 'Venkatesan_Hemashree' (Alias: HVenk, Email: hemashree@caanmudhavan.com). Buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users' are available. The top right of the page has a 'Help for this Page' link. The bottom right shows navigation links for letters A-Z and a 'All' link.

| | Action | Full Name | Alias | Username | Role | Active | Profile |
|--------------------------|----------------------|----------------------|-------|----------------------------|------|-------------------------------------|----------------------|
| <input type="checkbox"/> | Edit | Venkatesan_Hemashree | HVenk | hemashree@caanmudhavan.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, Administration, Users (with 'Permission Set Groups' expanded), and Roles. The main content area displays a table of permission sets with columns for Action, Permission Set Label, Description, and License. The table lists various roles like 'Buyer', 'CRM User', 'Commerce Admin', etc., each with a brief description and the license it grants. A navigation bar at the bottom shows '1-25 of 31' and '0 Selected'. A footer indicates 'Page 1 of 2'.

| 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"/> | Experience Profile Manager | Lets users create, read, edit, and delete locations, subloc... | Salesforce |
| <input type="checkbox"/> | Facility Manager | Give your mobile workforce access to the Field Service mo... | Facility Manager |
| <input type="checkbox"/> | FieldServiceMobileStandardPermSet | Allow access to commerce merchandising features | Field Service Mobile |
| <input type="checkbox"/> | Merchandiser | Read Access to all entities enabled by Order Management | Commerce Merchandiser User Permission Set License Seat |
| <input type="checkbox"/> | Order Management Agent | Access to all features enabled by Order Management | Lightning Order Management User |
| <input type="checkbox"/> | Order Management Operations Manager | Limited access to Order Management features for Self Ser... | Lightning Order Management User |
| <input type="checkbox"/> | Order Management Shopper | | |
| <input type="checkbox"/> | Order Management Store Associate | | |

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Permission Sets' and displays a permission set named 'permission01'. A modal window titled 'Edit Properties' is open, showing fields for 'Label' (set to 'permission01'), 'API Name' (set to 'permission01'), and 'Description'. Below the modal, sections for 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', and 'External Data Source Access' are visible. The status bar at the bottom indicates 'Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform'.

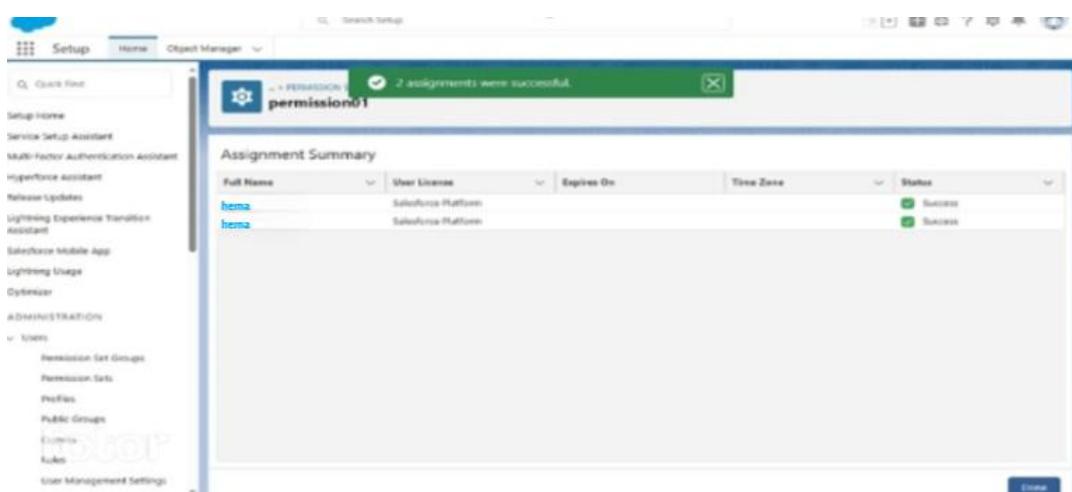
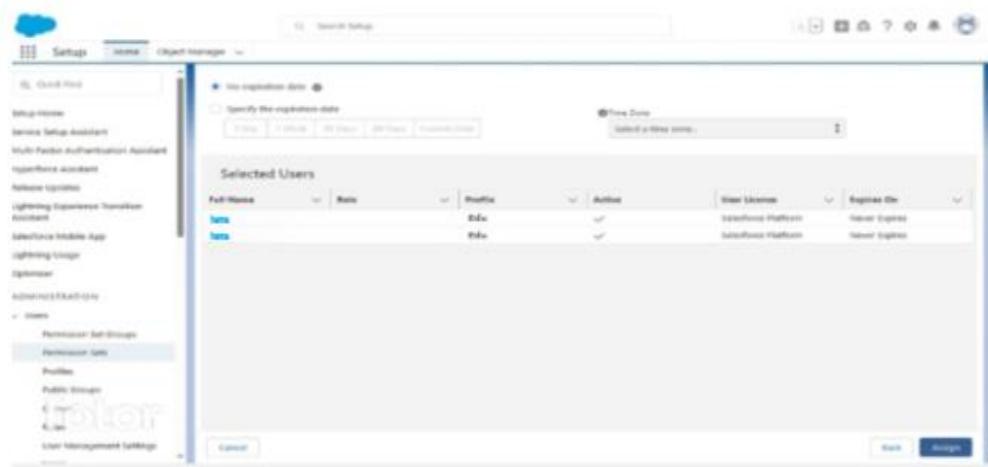
The screenshot shows the Salesforce Setup interface. The navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Permission Sets' and displays a permission set named 'permission01'. The 'Object Settings' dropdown is set to 'Accounts'. Under 'Object Permissions', a table lists permissions for the 'Accounts' object: Read, Create, Edit, Delete, View All, and Modify All, all of which are enabled. Under 'Field Permissions', a table lists permissions for various account fields: Account Name, Account Number, Account Owner, Account Site, Account Source, Active, and Annual Revenue, with varying levels of access (Read, Edit, or both) enabled for each.

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Left Sidebar:** A navigation menu with sections 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". Under "ADMINISTRATION", there is a "Users" section and a "Permission Set Groups" section which is expanded to show "Permission Sets", "Profiles", "Public Groups", "Queues", "Roles", and "User Management Settings".
- Main Content Area:** Titled "Permission Sets" under "SETUP".
 - Permission Set Overview:** Shows a permission set named "permission01". It includes a "Find Settings..." search bar and buttons for "Clone", "Delete", "Edit Properties", and "Manage Assignments".
 - Object Settings:** Set to "Accounts".
 - Accounts 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"/> |



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

Step 1: Create a custom object

- 1.Click Setup.
- 2.In the Object Manager, click Create | Custom Object.
- 3.Now create a custom object Survey Result and fields as shown in the screenshot below:
4. Click Save.



SETUP > OBJECT MANAGER
Survey Result

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

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

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

The screenshot shows the 'Email Template' page in Salesforce. At the top, it displays the template name 'Thank You Email - Survey'. On the right, there are buttons for 'Edit in Builder', 'Edit', and 'Clone'. Below the title, there are two tabs: 'Details' (which is selected) and 'Related'. The 'Information' section contains fields for 'Email Template Name' (set to 'Thank You Email - Survey'), 'Related Entity Type' (set to 'Survey Result'), 'Description' (empty), and 'Folder' (set to 'Public Email Templates'). A checkbox labeled 'Made in Email Template Builder' is checked. The 'Message Content' section includes a 'Subject' field set to 'Thank You For Completing Our Survey!' and an 'HTML Value' field containing the following content:

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

The 'Additional Information' section shows 'Created By' as Rakesh Gupta on 12/21/2020, 4:23 PM, and 'Last Modified By' as Rakesh Gupta on 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.

The screenshot shows the 'Edit Email Alert' interface for a 'Survey - Thank You Email'. The 'Description' field contains 'Survey - Thank You Email'. The 'Unique Name' field is 'Survey_Thank_You_Email'. The 'Object' is set to 'Survey Result'. The 'Email Template' is 'Thank You Email - Survey'. There is a checked 'Protected Component' checkbox. In the 'Recipients' section, the 'Available Recipients' list includes 'User: Integration User', 'User: Rakesh Gupta', and 'User: Security User'. The 'Selected Recipients' list shows 'Email Field: Email'. A note below says 'You can enter up to five (5) email addresses to be notified.' The 'From Email Address' section has 'Current User's email address' selected and a checkbox for 'Make this address the default From email address for this object's email alerts.' Buttons at the bottom include 'Save', 'Save & New', and '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 | * API Name |
| <input type="text" value="Save Response"/> | <input type="text" value="Save_Response"/> |
| Description | |
| <input type="text"/> | |

How Many Records to Create

One
 Multiple

How to Set the Record Fields

Use all values from a record
 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 | Value |
|--|--|
| <input type="text" value="Comment__c"/> | <input type="text" value="A_a Comment"/> ← A_a Comment > Value X Delete |
| <input type="text" value="Email__c"/> | <input type="text" value="A_a Email > Value"/> ← A_a Email > Value X Delete |
| <input type="text" value="Name__c"/> | <input type="text" value="(!Name.firstName) (!Name.lastName)"/> ← (!Name.firstName) (!Name.lastName) X Delete |
| <input type="text" value="Rating__c"/> | <input type="text" value="A_a Rating"/> ← A_a Rating X Delete |
| + Add Field | |
| <input type="checkbox"/> Manually assign variables | |

Cancel 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 | |
| A_a * Record ID | {!Save_Response} |
| <input type="button" value="Cancel"/> <input type="button" value="Done"/> | |

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

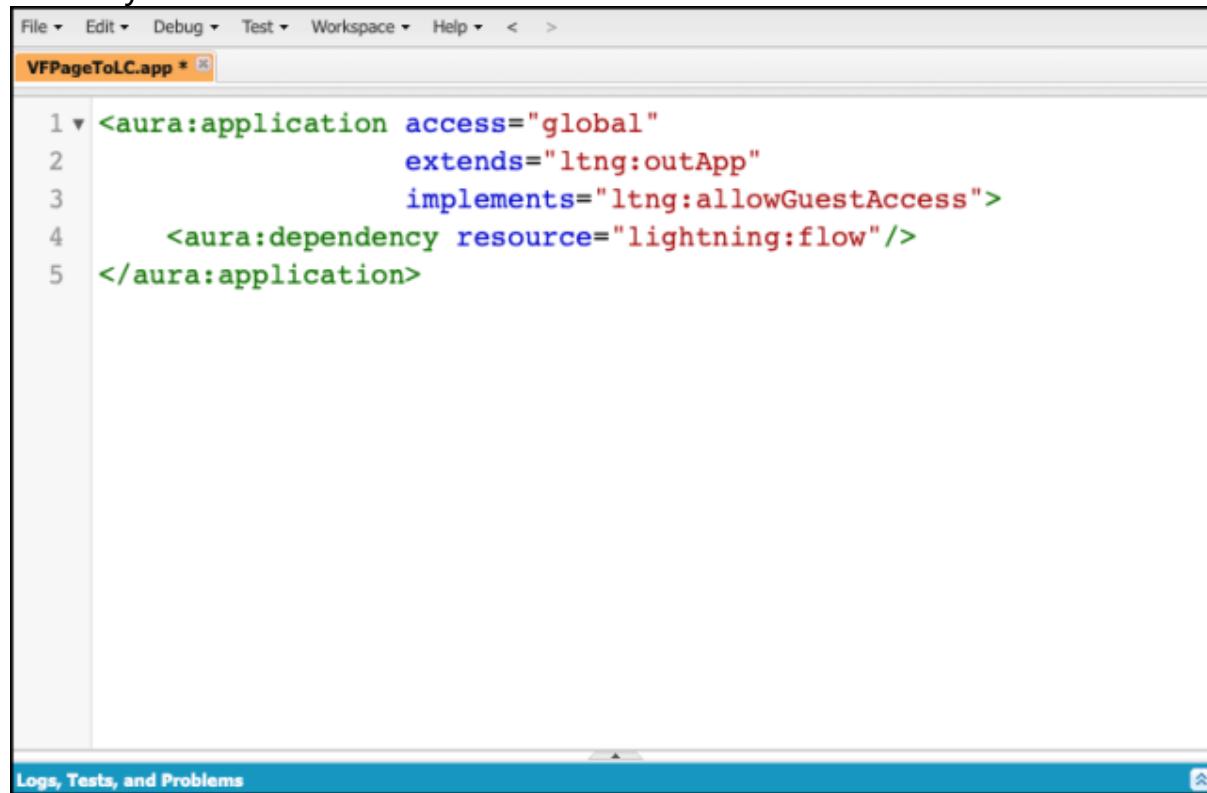
The screenshot shows the 'Save as' dialog for a new flow. The 'Flow Label' is 'Survey' and the 'Flow API Name' is also 'Survey'. There is a large empty 'Description' field. Under 'How to Run the Flow', it says 'User or System Context—Depends on How Flow is Launched'. The 'Type' is set to 'Screen Flow'. The 'API Version for Running the Flow' is 51. In the 'Interview Label' section, there is a text input field with placeholder 'Insert a resource...' and a search icon, containing the expression 'Survey {!\$Flow.CurrentDateTime}'. At the bottom, the status is 'Active', the type is 'Screen Flow', and the version number is 2. The dialog has 'Cancel' and 'Save' buttons.

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.



The screenshot shows a code editor window with the title bar "File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >" and the tab "VFPageToLC.app *". The main content area contains the following code:

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

The code defines an Aura application component with global access, extending "ltng:outApp", and implementing "ltng:allowGuestAccess". It includes a dependency on "lightning:flow". The code editor has a dark theme with syntax highlighting for the XML-like language.

```

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

Last Name

*Email

*Rating
 5 6

*Comment
 

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.