

NAAN MUDHALVAN
Salesforce Developer(Course)
Assignment no 1

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1F3D5B05B7ABB97A7DB4989AF1EA1418

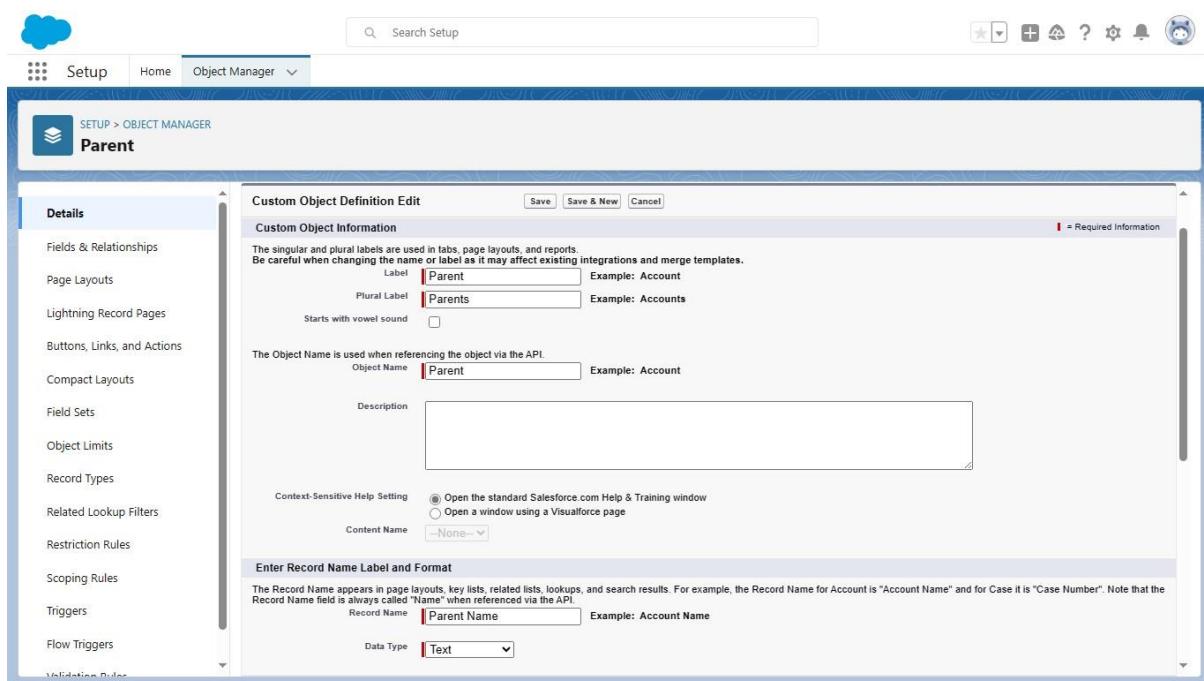
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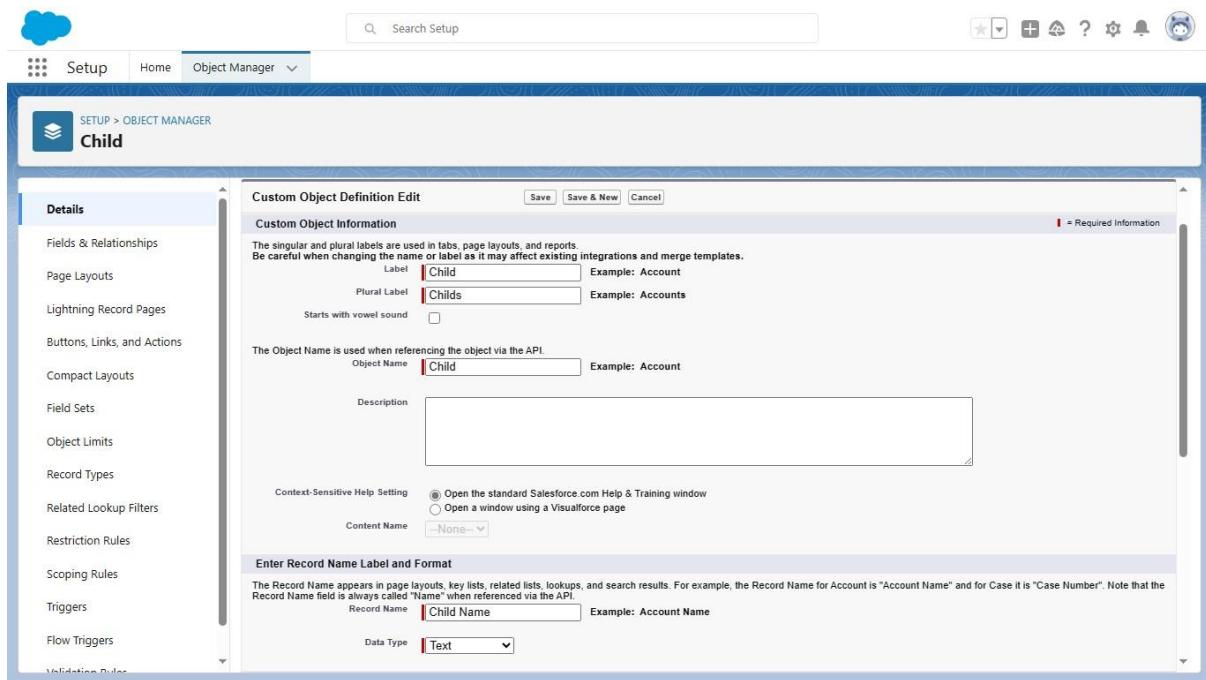
Batch : 2024

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.**

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Parent

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

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)		✓

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Parent

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

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

Setup Home Object Manager

SETUP > OBJECT MANAGER Parent

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

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

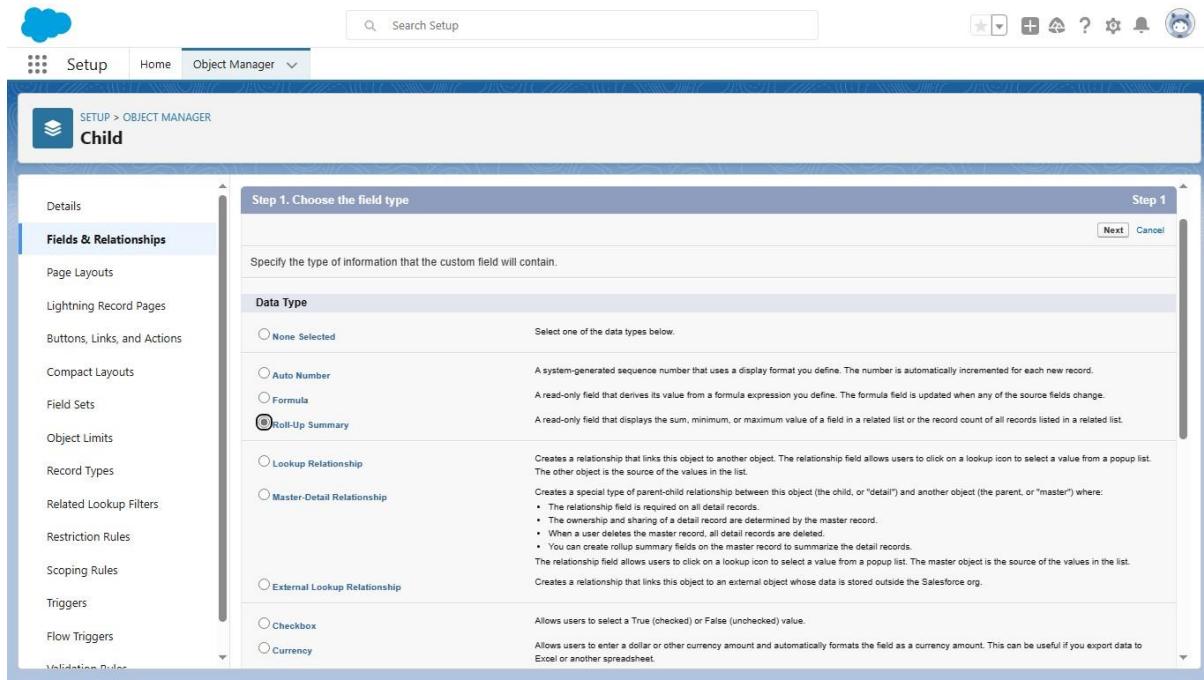
Setup Home Object Manager

SETUP > OBJECT MANAGER Child

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

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)		



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 note says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Object Tabs' and lists tabs for 'Brokers' (People tab style), 'Childs' (Lightning tab style), 'Parents' (Lightning tab style), and 'Properties' (Real Estate Sign tab style). Below this are sections for 'Web Tabs' (No Web Tabs have been defined), 'Visualforce Tabs' (No Visualforce Tabs have been defined), 'Lightning Component Tabs' (No Lightning component tabs have been defined), and 'Lightning Page Tabs' (empty table).

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 'Lightning Experience App Manager' page. The left sidebar has a search bar and navigation links like 'Setup', 'Home', and 'Object Manager'. Under 'Apps', 'App Manager' is selected. The main area lists 22 items, sorted by App Name, with columns for App Name, Developer Name, Description, Last Modified, Type, and Visibility. The list includes standard Salesforce apps like 'All Tabs', 'Analytics Studio', and various sales and marketing tools.

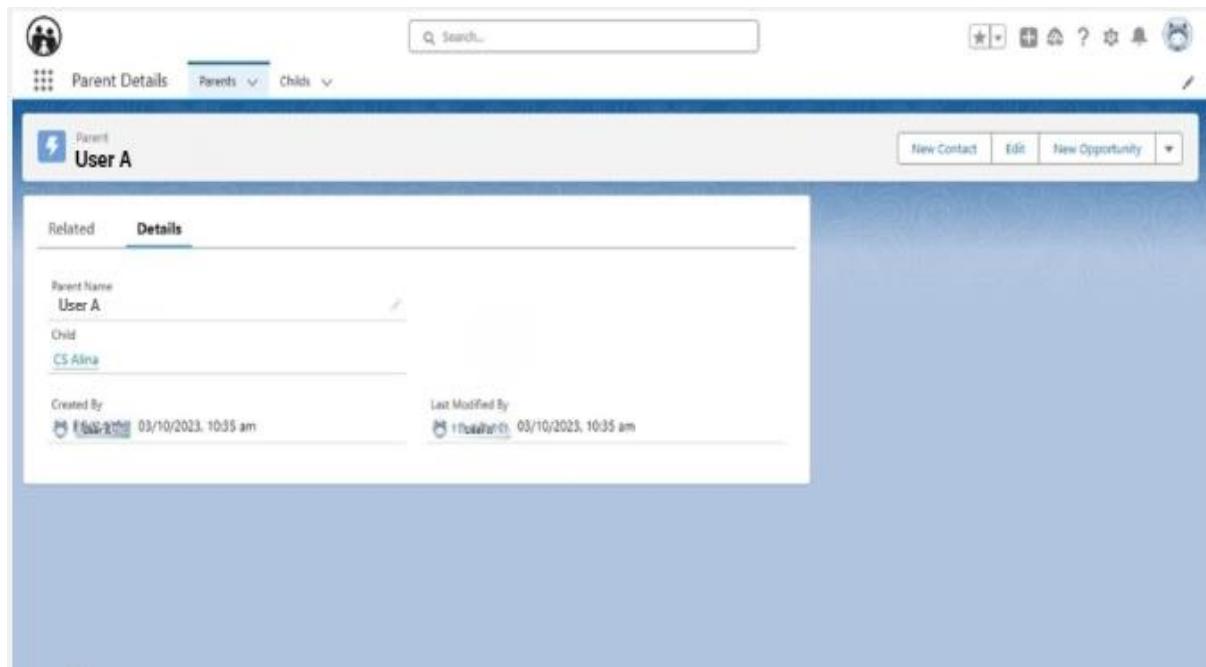
App Name ↑	Developer Name	Description	Last Modified ...	Type	Vi...
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	22/08/2023, 11:15 am	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/08/2023, 11:15 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	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	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	✓

The screenshot shows the 'New Lightning App' configuration page. It has two main sections: 'App Details' and 'App Branding'. In 'App Details', fields include 'App Name' (set to 'Parent Details'), 'Developer Name' (set to 'User A'), and 'Description' (set to 'Enter a description...'). In 'App Branding', there's a file upload field for an 'Image', a color picker for 'Primary Color Hex' (set to '#007002'), and an option to use 'Org Theme Options' (unchecked). At the bottom, there's a preview section for the 'App Launcher Preview' and a 'Next' button.

Step 5: Test the Relationship and Roll-Up Summary Field
Create some records in both the Parent and Child objects and verify that the Roll-Up Summary Field correctly calculates the total number of related Child records on the Parent record.

That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and

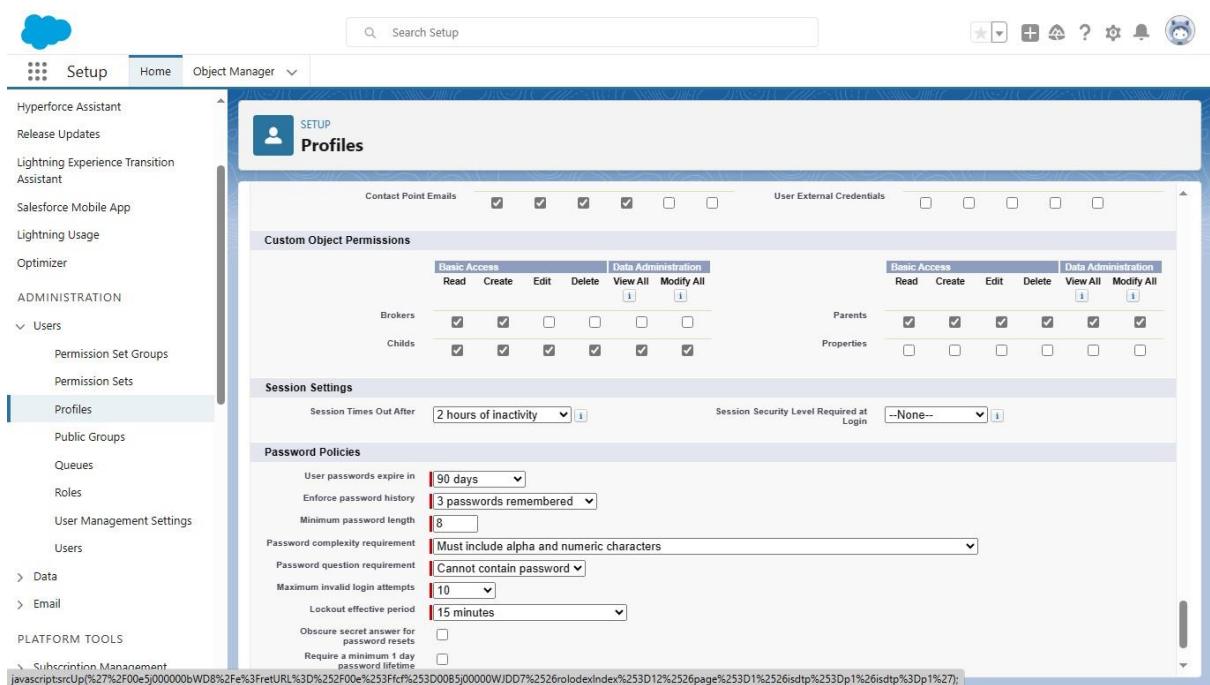
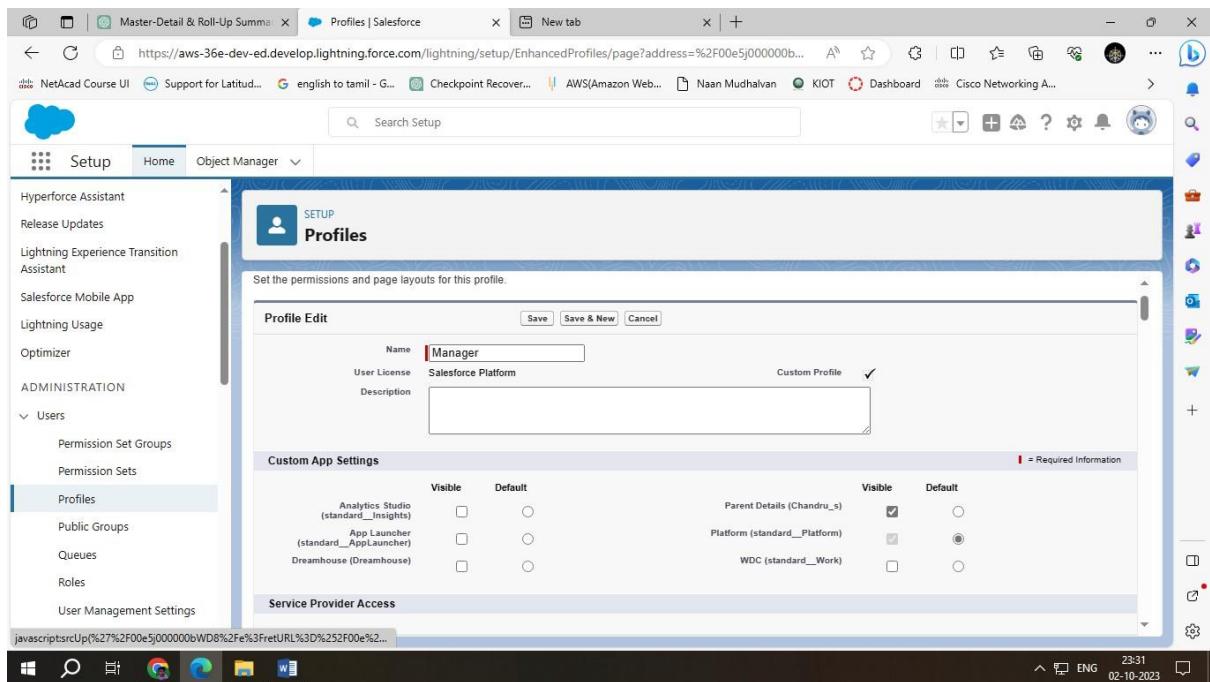
Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



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

Step 1: Create a Public Group

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



Step 2: Create Criteria-Based Sharing Rules

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

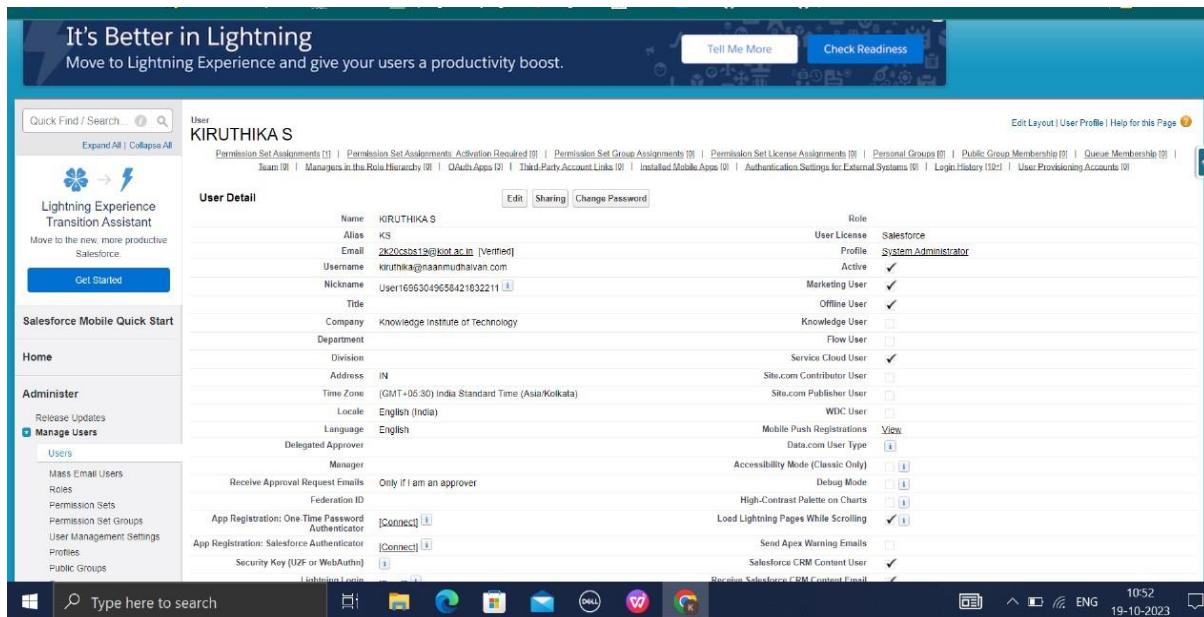
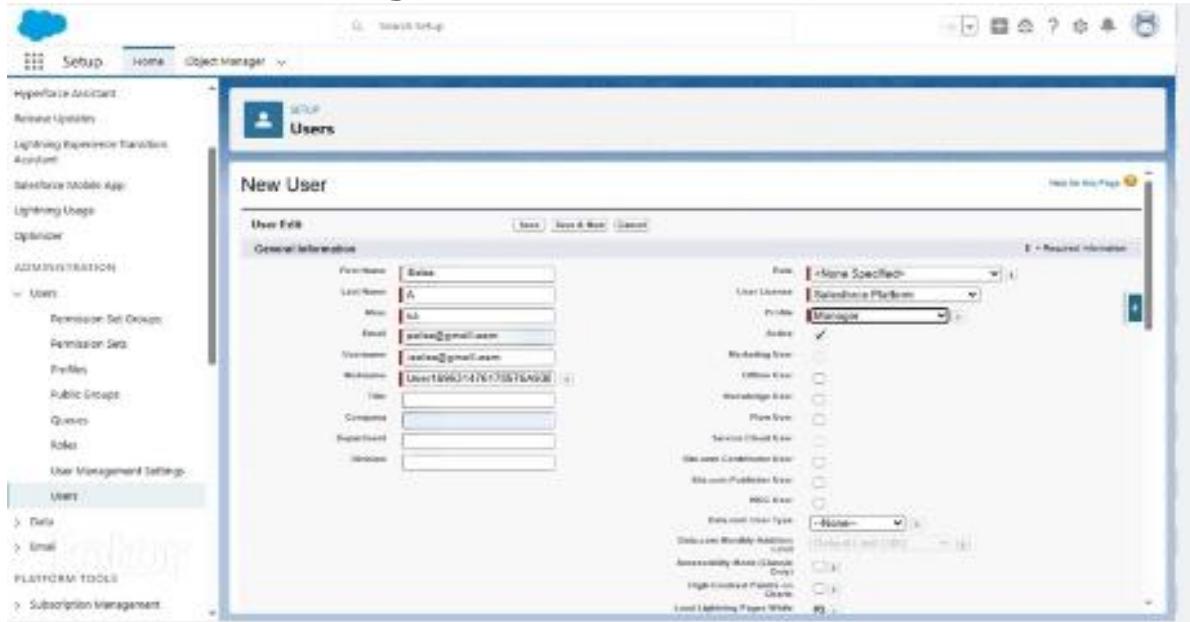
2. In the Quick Find box, type "Sharing Rules" and select "Sharing Settings."

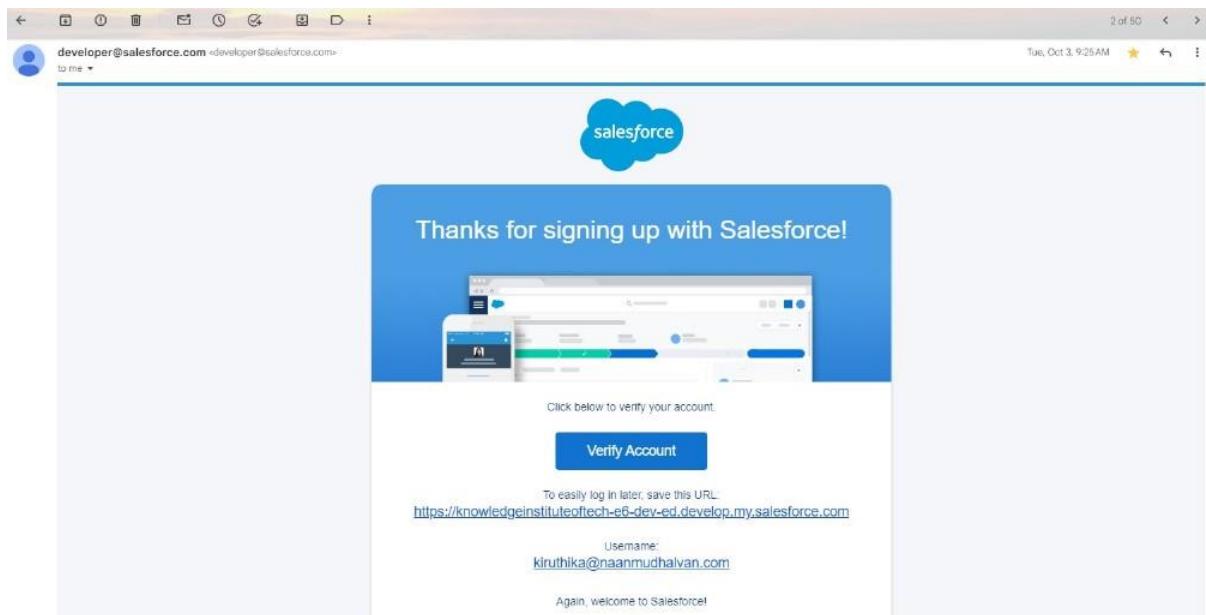
3. Under "Account Sharing Rules," click on "New Sharing Rule."

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.





A screenshot of a "Change Your Password" form. The title is "Change Your Password" with the Salesforce logo above it. The form asks for a new password, specifying it must be at least 8 characters long, contain one letter, and one number. It includes fields for "New Password" and "Confirm New Password". A note states "Your Password cannot equal or contain your user name." A "Change Password" button is at the bottom. A message at the bottom indicates "Password was last changed on 17/10/2023, 11:25 am."

Enter a new password for
kiruthika@naanmudhalvan.com. Make sure to include
at least:

8 characters
 1 letter
 1 number

* New Password

* Confirm New Password

Your Password cannot equal or contain your user name.

Change Password

Password was last changed on 17/10/2023, 11:25 am.

Profile Edit

Bmanager

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom Object Permissions

	Basic Access	Create	Edit	Delete	Data Administration		Basic Access	Create	Edit	Delete	Data Administration
Brokers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Childs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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 'User Edit' page for a user named 'KIRUTHIKA S'. The page is titled 'User Edit' and includes tabs for 'Save', 'Save & New', and 'Cancel'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. To the right of these fields are checkboxes for various user roles such as 'Role' (set to '<None Specified>'), 'User License' (set to 'Salesforce'), 'Profile' (set to 'System Administrator'), 'Active' (checked), 'Marketing User' (checked), 'Offline User' (checked), 'Knowledge User' (unchecked), 'Flow User' (unchecked), 'Service Cloud User' (checked), 'Site.com Contributor User' (unchecked), 'Site.com Publisher User' (unchecked), 'WDC User' (unchecked), 'Data.com User Type' (set to 'None'), 'Data.com Monthly Addition Limit' (set to 300), 'Accessibility Mode (Classic Only)' (unchecked), 'High-Contrast Palette on Charts' (unchecked), 'Load Lightning Pages While Scrolling' (checked), 'Debug Mode' (unchecked), 'Send Apex Warning Emails' (unchecked), 'Mako Setup My Default Landing Page' (checked), 'Quick Access Menu' (checked), 'Development Mode' (unchecked), and 'Show View State in Development Mode' (unchecked). A sidebar on the left provides links for 'Get Started', 'Salesforce Mobile Quick Start', 'Home', 'Administrator', 'Release Updates', and 'Manage Users'.

Step 3: Assign Records Ownership

The screenshot shows the 'Permission Sets' page in the Salesforce Setup interface. The page title is 'Permission Set Create'. It includes fields for 'Label' (set to 'permission'), 'API Name' (set to 'permission'), and 'Description'. Below these fields is a checkbox for 'Session Activation Required' (unchecked). The next section, 'Select the type of users who will use this permission set', contains a note about choosing a license type. It includes a dropdown for 'License' (set to 'None') and a 'Save' button at the bottom. The left sidebar lists various setup categories such as 'Hyperforce Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'ADMINISTRATION' (with sub-options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'), 'Data', 'Email', 'PLATFORM TOOLS', and 'Subscription Management'.

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

- Left Navigation Bar:** 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), Data, Email, and PLATFORM TOOLS.
- Current Page:** Permission Sets
- Content Area:** Displays the "Object Settings" section for the "permission" object. It includes a table with columns: Object Name, Object Permissions, Total Fields, and Tab Settings. The table lists various objects like Accounts, AI Insight Reasons, Alternative Payment Methods, etc., all with "No Access" permissions.

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

- Left Navigation Bar:** Same as the first screenshot, showing the ADMINISTRATION section under Permission Sets.
- Current Page:** Permission Sets
- Content Area:** Displays the "Childs" tab settings. It includes a "Tab Settings" table with columns Available and Visible, and a "Object Permissions" table for the "permission" object. The "Object Permissions" table has columns Permission Name and Enabled, with most permissions checked (Read, Create, Edit, Delete, View All, Modify All).

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Home, Object Manager, and various administrative tools like User Management Settings, Feature Settings, Data.com, and Service. Under "Users", "Permission Set Groups" and "Permission Sets" are selected. The main content area is titled "Permission Sets" and contains a table of existing permission sets. The table columns are Action, Permission Set Label, Description, and License. The table lists several permission sets, including "Buyer", "Buyer Manager", "C360 High Scale Flow Integration User", "CRM User", "Commerce Admin", and "Contact Center Admin". A navigation bar at the bottom allows switching between pages 1 and 2.

The screenshot shows the "Permission Set Permission" page. The left sidebar is identical to the previous screenshot. The main content area is titled "permission" and shows a configuration for assigning expiration options to users assigned to the "permission" permission set. It includes fields for "No expiration date" (selected), "Specify the expiration date" (with options for 1 Day, 1 Week, 30 Days, 60 Days, or Custom Date), and a "Time Zone" dropdown. Below this, a table titled "Selected Users" lists "Kiruthika S" with details: Full Name (Kiruthika S), Role (Manager), Profile (Manager), Active (checked), User License (Salesforce Platform), and Expires On (Never Expires).

Setup Home Object Manager

Hyperfector

1 assignments were successful.

permission

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Kiruthika S	Salesforce Platform			Success

Users

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

Data

Email

Setup Home Object Manager

Hyperfector

Permission Sets

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 Pricino Response Events	No Access	..
Process Exceptions	No Access	12
Product Attributes	No Access	3
Product Attribute Set Products	No Access	2

Subscription Management

```
javascript:srcSelf("%2FOPSS%00007Uxi%3Fs%3DEntibPermissions%26o%3D0115j...")
```

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 (with sub-sections for Users, Permission Set Groups, and Permission Sets), Data, Email, and Platform Tools. The "Permission Sets" section is currently selected. The main content area is titled "Permission Sets" and shows a "permission" record. The "Object Settings" tab is selected, and the "Parents" section is active. It displays "Tab Settings" (Available: Child, Visible: Child) and "Object Permissions" for the "permission" object. The "Object Permissions" table shows the following data:

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"/>

Below this is a "Field Permissions" section with a table:

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

At the bottom of the page, there is a URL: <https://aws-36e-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/0P55j000007Uxoi/e?e=EntityPermissions&o=011j000002rl5H&isdt=p1>.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous one. The main content area is titled "Assignment Summary" and shows a success message: "1 assignments were successful." Below this, it lists the assignment details for user "Kiruthika S". The table shows the following data:

Full Name	User License	Expires On	Time Zone	Status
Kiruthika S	Salesforce Platform			<input checked="" type="checkbox"/> Success

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 All Users page. At the top, there's a banner for Lightning Experience. The main area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table includes rows for various users like Chatter Expert, Marketing User, SVP Sales & Marketing, etc. The URL in the address bar is https://knowledgeinstituteoftech-e6-dev-ed-develop.my.salesforce.com/00E5g000003Sjk2.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00E5g00000hz5ueav.05fhz0au1jd@chatter.salesforce.com	SVP_Sales & Marketing	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	m.sethy	seth	sethy123@gmail.com	SVP_Human_Resources	<input checked="" type="checkbox"/>	Force.com - Free User
<input type="checkbox"/>	s.kru	ks	ksse@gmail.com		<input checked="" type="checkbox"/>	Marketing User
<input type="checkbox"/>	S.KIRUTHIKA	KS	kiruthika@naanendhalavan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00E5g0000khz5ueav.com		<input checked="" type="checkbox"/>	Analytics_Cloud_Integration_User
<input type="checkbox"/>	User_Security	sec	insightsecurity@00E5g0000hz5ueav.com		<input checked="" type="checkbox"/>	Analytics_Cloud_Security_User

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

Help for this Page

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

Setup Home Object Manager

Lightning Usage Optimizer ADMINISTRATION

Users

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

> Data

> Email

PLATFORM TOOLS

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

SETUP Profiles

Help for this Page

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 'user' and contains the following navigation items under 'Users': Permission Set Groups, Permission Sets, Profiles (which is selected), Public Groups, Queues, Roles, User Management Settings, and Users. Under 'Feature Settings', there are Data.com, Prospectors (with 'Prospector Users' selected), and Service. The main content area is titled 'SETUP Profiles' and shows the 'Profile Edu'. It includes a list of permissions and page layouts, a 'Profile Detail' section with fields like Name (Edu), User License (Salesforce Platform), Description, Created By (JAYASHREE A, 18/10/2023, 9:06 am), and Modified By (JAYASHREE A, 18/10/2023, 9:06 am). Below this is a 'Page Layouts' section titled 'Standard Object Layouts'.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous one, with the 'Profiles' item still selected. The main content area is titled 'SETUP Profiles' and shows the 'Page Layouts' section. It lists various standard object layouts, each with a Global column, a specific object column (e.g., Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, Asset Relationship, Assigned Resource), and a corresponding layout name (e.g., Global Layout, Not Assigned, Home Page Default, Account Layout, Alternative Payment Method Layout, Appointment Invitation Layout, Asset Layout, Asset Relationship Layout, Assigned Resource Layout). The 'Object Milestone' and 'Payment' columns are also visible. A note at the bottom of the table states 'Profile: Standard Platform User - Salesforce - Developer Edition'.

The screenshot shows the Salesforce Setup interface with the 'Profiles' 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, Permission Set Groups, Permission Sets, Profiles (which is highlighted), Public Groups, Queues, Roles, User Management Settings, and Help.

The main content area displays the 'Profiles' setup page. It features two tabs for 'Basic Access' and 'Data Administration'. Under 'Basic Access', there are sections for 'Brokers' and 'Childs'. Under 'Data Administration', there are sections for 'Parents' and 'Properties'. Below these tabs are 'Session Settings' and 'Password Policies' sections. The 'Session Settings' section includes fields for 'Session Times Out After' (set to '2 hours of inactivity') and 'Session Security Level Required at Login' ('None'). The 'Password Policies' section includes fields for 'User passwords expire in' (set to '90 days'), 'Enforce password history' (set to '3 passwords remembered'), 'Minimum password length' (set to '8'), 'Password complexity requirement' (set to 'Must include alpha and numeric characters'), 'Maximum invalid login attempts' (set to '10'), 'Lockout effective period' (set to '15 minutes'), and other options like 'Obscure secret answer for password resets' and 'Require a minimum 1 day password lifetime'.

The screenshot shows the Salesforce Setup interface with the 'Profile Edit' page for the 'Edu' profile selected. The left sidebar includes links for Setup Home, Object Manager, and a search bar. The main content area displays the 'Profile Edit' page for the 'Edu' profile. It shows the profile's name as 'Edu', user license as 'Salesforce Platform', and a checked 'Custom Profile' checkbox. A note below states 'Set the permissions and page layouts for this profile.' The 'Custom App Settings' section lists several app settings with their visibility and default status. The apps listed are Analytics Studio (standard_Insights), App Launcher, Platform (standard_Platform), and WDC (standard_Work). The 'Analytics Studio (standard_Insights)' and 'App Launcher' rows have 'Visible' checkboxes checked and 'Default' radio buttons set to 'No'. The 'Platform (standard_Platform)' row has 'Visible' checked and 'Default' checked. The 'WDC (standard_Work)' row has both 'Visible' and 'Default' checkboxes checked.

Home Chatter Libraries Content Subscriptions +

It's Better in Lightning
Move to Lightning Experience and give your users a productivity boost.

[Tell Me More](#) [Check Readiness](#)

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](#)

New User	Reset Password(s)	Add Multiple Users	Role	Active	Profile
<input type="checkbox"/> Edit Chatter_Expert	Chatter	chatty.00d5g00000hnz5eav.v5fhz0auipd@chatter.salesforce.com	SVP_Sales & Marketing	<input checked="" type="checkbox"/>	Chatter_Free_User
<input type="checkbox"/> Edit S_sathyas	smt	sathyas123@gmail.com	SVP_Human Resources	<input checked="" type="checkbox"/>	Force_com_-Free_User
<input type="checkbox"/> Edit S_KIRUTHIKA	ks	hsse@gmail.com	Marketing_User	<input checked="" type="checkbox"/>	Marketing_User
<input type="checkbox"/> Edit S_XIRUTHIKA	KS	kiruthika@naanmudhalvan.com	System Administrator	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit User_Integration	integ	integration@00e5g00000hz6ueav.com	Analytics_Cloud_Integration_User	<input checked="" type="checkbox"/>	Analytics_Cloud_Integration_User
<input type="checkbox"/> Edit User_Security	sec	insightsecurity@00e5g00000hz6ueav.com	Analytics_Cloud_Security_User	<input checked="" type="checkbox"/>	Analytics_Cloud_Security_User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

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

[https://knowledgeinstitutedoftech-e6-dev-ed.develop.my.salesforce.com/00E5g000003Sjk2](#)

Quick Find / Search [🔍](#)

Expand All | Collapse All

Lightning Experience Transition Assistant:
Move to the new, more productive Salesforce.

[Get Started](#)

Salesforce Mobile Quick Start

Home

Administrator

- Release Updates
- [Manage Users](#)
- Users
- Mass Email Users
- Entites

User Edit

KIRUTHIKA S

User Edit

Save Save & New Cancel

General Information

I Required Information

First Name	KIRUTHIKA	Role	<None Specified>
Last Name	S	User License	Salesforce
Alias	KS	Profile	System Administrator
Email	2k20csbs19@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	kiruthika@naanmudhalvan	Marketing User	<input checked="" type="checkbox"/>
Nickname	User169630496584218322	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"/>

WDC User

Data.com User Type	<None..>
Data.com Monthly Addition Limit	300
Accessibility Mode (Classic Only)	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Debug Mode	<input type="checkbox"/>
Send Apex Warning Emails	<input type="checkbox"/>
Mako Setup My Default Landing Page	<input checked="" type="checkbox"/>
Quick Access Menu	<input checked="" type="checkbox"/>
Development Mode	<input type="checkbox"/>
Show View State in Development Mode	<input type="checkbox"/>

User Edit
KIRUTHIKA S

User Edit

General Information

First Name	KIRUTHIKA	Role	<None Specified>
Last Name	S	User License	Salesforce
Alias	KS	Profile	System Administrator
Email	2k20csbs19@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	kiruthika@naanmudhalvan	Marketing User	<input checked="" type="checkbox"/>
Nickname	User169630490584218322	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"/>

Data.com User Type: None

Other settings include:

- Data.com Monthly Addition Limit: 300
- Accessibility Mode (Classic Only):
- High-Contrast Palette on Charts:
- Load Lightning Pages While Scrolling:
- Debug Mode:
- Send Apex Warning Emails:
- Make Setup My Default Landing Page:
- Quick Access Menu:
- Development Mode:
- Show View State in Development Mode:

Admin Users

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

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

View: Admin Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	S_KIRUTHIKA	KS	kiruthika@naanmudhalvan.com	System Administrator	<input checked="" type="checkbox"/>	

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 following details:

- Header:** Search Setup, Home, Object Manager, Setup.
- Left Sidebar:**
 - Setup Home
 - Service Setup Assistant
 - Multi-Factor Authentication Assistant
 - Hyperforce Assistant
 - Release Updates
 - Lightning Experience Transition Assistant
 - Salesforce Mobile App
 - Lightning Usage
 - Optimizer
 - ADMINISTRATION** (expanded)
 - Users** (expanded)
 - Permission Set Groups
 - Permission Sets** (selected)
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
- Content Area:**

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#).

All Permission Sets | Edit | Delete | Create New View

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		Salesforce
<input type="checkbox"/>	Facility 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

1-25 of 31 | 0 Selected | Page 1 of 2

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

- Header:** Search Setup, Home, Object Manager, Setup.
- Left Sidebar:**
 - Setup Home
 - Service Setup Assistant
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 - Hyperforce Assistant
 - Release Updates
 - Lightning Experience Transition Assistant
 - Salesforce Mobile App
 - Lightning Usage
 - Optimizer
 - ADMINISTRATION** (expanded)
 - Users** (expanded)
 - Permission Set Groups
 - Permission Sets** (selected)
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
- Content Area:**

Permission Set
Permission01

Permission Set Overview

Description	API Name	permission01
License	Namespace Prefix	
Session Activation Required	Created By	Chandru S. 03/10/2023, 1:59 pm
Last Modified By		

Edit Properties

Label: permission01
API Name: permission01
Description:
Session Activation Required:

Save | **Cancel**

App Permissions
 Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
 Permissions to execute Apex classes

Visualforce Page Access
 Permissions to execute Visualforce pages

External Data Source Access
 Permissions to authenticate against external data sources

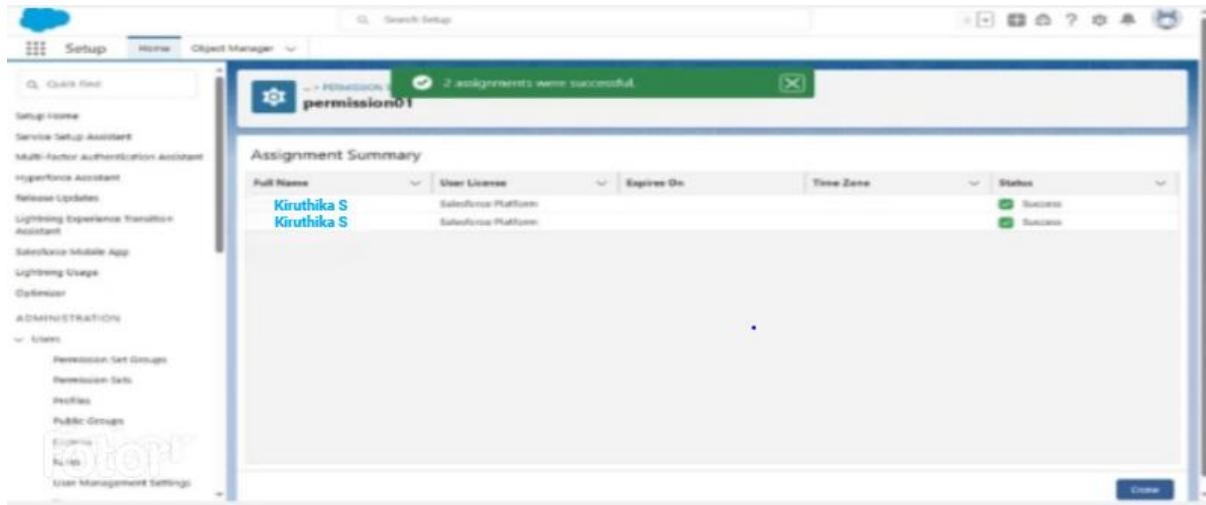
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

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

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with Users expanded), Permission Set Groups (with Permission Sets selected).
- Main Content:**
 - Section Header:** SETUP, Permission Sets.
 - Permission Set:** permission01.
 - Buttons:** Find Settings..., Clone, Delete, Edit Properties, Manage Assignments, Video Tutorial | Help for this Page.
 - Breadcrumbs:** Permission Set Overview > Object Settings > Accounts.
 - Accounts:** Edit button.
 - Object Permissions:** A table with columns: Permission Name (Read, Create, Edit, Delete, View All, Modify All) and Enabled (checkboxes). Most checkboxes are checked.
 - Field Permissions:** A table with columns: Field Name (Account Name, Account Number, Account Owner, Account Site, Account Source, Active, Annual Revenue) and Read Access / Edit Access checkboxes. Most checkboxes are checked.

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

- Header:** Search Setup, Home, Object Manager.
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 - Field Permissions:** A table with columns: Field Name (Account Name, Account Number, Account Owner, Account Site, Account Source, Active, Annual Revenue) and Read Access / Edit Access checkboxes. Most checkboxes are checked.



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

Step 1: Create a custom object

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



SETUP > OBJECT MANAGER
Survey Result

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

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

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

Email Template
Thank You Email - Survey

[Edit in Builder](#) [Edit](#) [Clone](#)

Details	Related
Information	
Email Template Name Thank You Email - Survey	Related Entity Type Survey Result
Description	Folder Public Email Templates
Made in Email Template Builder <input checked="" type="checkbox"/>	
Message Content	
Subject Thank You For Completing Our Survey!	Enhanced Letterhead
HTML Value	<p>Hi {{Survey_Result__c.Name__c}},</p> <p>Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.</p> <p>Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.</p> <p>Thanks, Automation Champion</p>
Additional Information	
Created By Rakesh Gupta , 12/21/2020, 4:23 PM	Last Modified By Rakesh Gupta , 12/21/2020, 4:32 PM

Step 3: Create an Email Alert

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

8.Click Save.

The screenshot shows the 'Edit Email Alert' page for 'Survey - Thank You Email'. The 'Description' field contains 'Survey - Thank You Email'. The 'Unique Name' field is set to 'Survey_Thank_You_Email'. The 'Object' is 'Survey Result'. The 'Email Template' is 'Thank You Email - Survey'. The 'Protected Component' checkbox is unchecked. Under 'Recipient Type', there is a search bar for 'User' and a 'Find' button. The 'Recipients' section has two panels: 'Available Recipients' (listing 'User: Integration User', 'User: Rakesh Gupta', and 'User: Security User') and 'Selected Recipients' (listing 'Email Field: Email'). Between them are 'Add' and 'Remove' buttons. A note says 'You can enter up to five (5) email addresses to be notified.' Below this is a large text area for 'Additional Emails'. The 'From Email Address' field is set to 'Current User's email address'. A checkbox allows setting this as the default from address. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

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 <table border="0" style="width: 100%;"> <tr> <td style="width: 20%; vertical-align: top;"> Field <input type="text" value="Comment__c"/> </td> <td style="width: 20%; vertical-align: top;"> Value <input type="text" value="A_a Comment X"/> </td> <td style="width: 10%; text-align: right; vertical-align: top;"> ← </td> <td style="width: 50%; vertical-align: top;"> <input type="button" value="Delete"/> </td> </tr> <tr> <td style="vertical-align: top;"> Field <input type="text" value="Email__c"/> </td> <td style="vertical-align: top;"> Value <input type="text" value="A_a Email > Value X"/> </td> <td style="text-align: right; vertical-align: top;"> ← </td> <td style="vertical-align: top;"> <input type="button" value="Delete"/> </td> </tr> <tr> <td style="vertical-align: top;"> Field <input type="text" value="Name__c"/> </td> <td style="vertical-align: top;"> Value <input type="text" value="(!Name.firstName) (!Name.lastName)"/> </td> <td style="text-align: right; vertical-align: top;"> ← </td> <td style="vertical-align: top;"> <input type="button" value="Delete"/> </td> </tr> <tr> <td style="vertical-align: top;"> Field <input type="text" value="Rating__c"/> </td> <td style="vertical-align: top;"> Value <input type="text" value="A_a Rating X"/> </td> <td style="text-align: right; vertical-align: top;"> ← </td> <td style="vertical-align: top;"> <input type="button" value="Delete"/> </td> </tr> <tr> <td colspan="4" style="text-align: left; padding-top: 5px;"> <input type="button" value="+ Add Field"/> </td> </tr> <tr> <td colspan="4" style="text-align: left; padding-top: 5px;"> <input type="checkbox"/> Manually assign variables </td> </tr> </table>		Field <input type="text" value="Comment__c"/>	Value <input type="text" value="A_a Comment X"/>	←	<input type="button" value="Delete"/>	Field <input type="text" value="Email__c"/>	Value <input type="text" value="A_a Email > Value X"/>	←	<input type="button" value="Delete"/>	Field <input type="text" value="Name__c"/>	Value <input type="text" value="(!Name.firstName) (!Name.lastName)"/>	←	<input type="button" value="Delete"/>	Field <input type="text" value="Rating__c"/>	Value <input type="text" value="A_a Rating X"/>	←	<input type="button" value="Delete"/>	<input type="button" value="+ Add Field"/>				<input type="checkbox"/> Manually assign variables			
Field <input type="text" value="Comment__c"/>	Value <input type="text" value="A_a Comment X"/>	←	<input type="button" value="Delete"/>																						
Field <input type="text" value="Email__c"/>	Value <input type="text" value="A_a Email > Value X"/>	←	<input type="button" value="Delete"/>																						
Field <input type="text" value="Name__c"/>	Value <input type="text" value="(!Name.firstName) (!Name.lastName)"/>	←	<input type="button" value="Delete"/>																						
Field <input type="text" value="Rating__c"/>	Value <input type="text" value="A_a Rating X"/>	←	<input type="button" value="Delete"/>																						
<input type="button" value="+ Add Field"/>																									
<input type="checkbox"/> Manually assign variables																									

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

Send Thank You Email

* API Name

Send_Thank_You_Email

Description

Set Input Values

A3 * Record ID

{!Save_Response}

[Cancel](#)

[Done](#)

Save as

A New Version
A New Flow

* Flow Label	* Flow API Name	
Survey	Survey	
Description		
<div style="height: 50px; border: 1px solid #ccc;"></div>		
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 (VFPPageToLC) 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

```

<apex:page showheader="false" lightningStylesheets="true">
<html>
<head>
<apex:includeLightning />
<!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualforce page-->
</head>
<body class="slds-scope">
<div id="flowContainer" />
<script>
var statusChange = function (event) {
if(event.getParam("status") === "FINISHED") {
var outputVariables = event.getParam("outputVariables");
var key;
for(key in outputVariables) {
if(outputVariables[key].name === "myOutput") {
}
}
}
};
$Lightning.use("c:VFFPageToLC", function() {
$Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
"flowContainer",
function (component) {
component.startFlow("Survey", );
}
);
});
</script>
</body>

```

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

- Now we will create a site to open the flow for unauthenticated access.
- 1.Click Setup.
 - 2.In the Quick Find box, type Sites.
 - 3.Clicks on the New button.
 - 4.Fill the details as per the screenshot below:
 - 5.Click Save.

Site Edit

Save **Cancel**

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

Under site, Public Access Settings make sure that guest users

have Create access on Survey Result object and Edit on the fields.

Proof of Concept

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

Survey

Name

First Name

Alok

Last Name

Sinfal

*Email

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.