

NAAN MUDHALVAN
Salesforce Developer(Course)
Assignment no 1

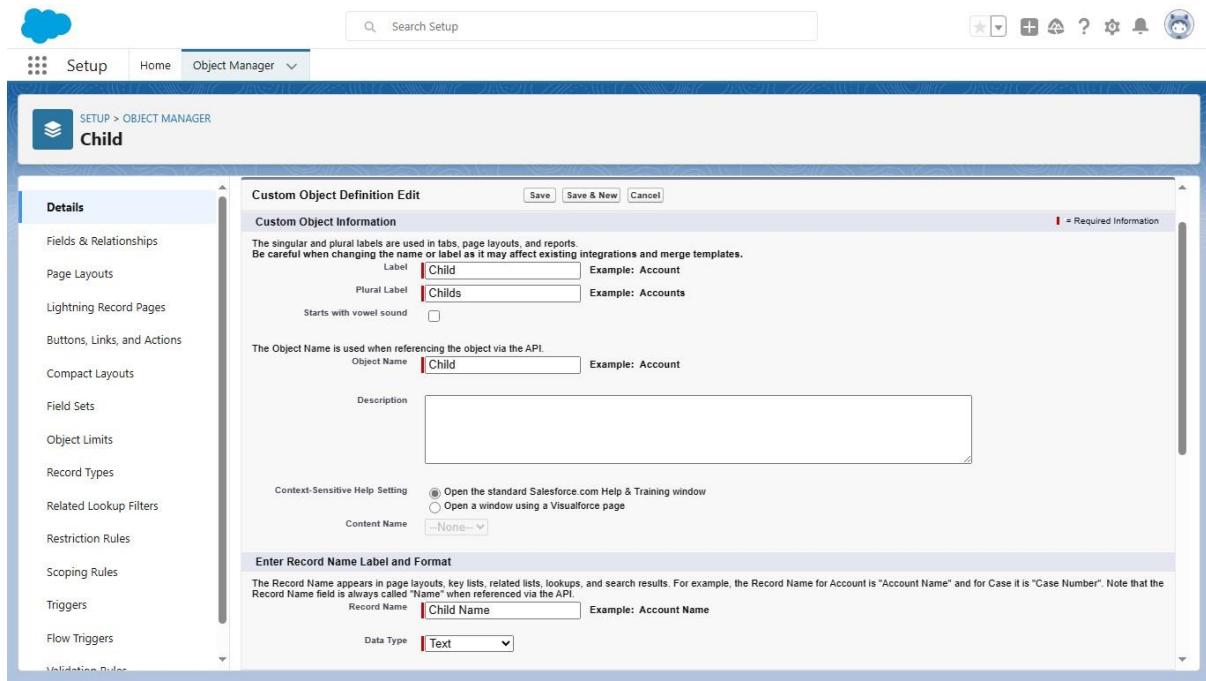
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Year & Dep : IV year & CSE
Zone no : Zone 8

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

Step 1: Create Custom Objects.

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

- Custom Object Information:**
 - Label: Parent
 - Plural Label: Parents
 - Starts with vowel sound:
 - The Object Name is used when referencing the object via the API.
Object Name: Parent
 - Description: (Empty text area)
 - Context-Sensitive Help Setting:
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
 - Content Name: None- Enter Record Name Label and Format:**
 - The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
 - Record Name: Parent Name
 - Example: Account Name
 - Data Type: Text



Step 2: Create a Master-Detail Relationship

1. Go to "Setup" in Salesforce.
2. In the Quick Find box, type "Objects" and select "Objects and Fields" > "Objects".
3. Click on "Parent" to edit it.
4. In the "Custom Fields & Relationships" section, click "New" under "Related To".
5. Choose "Master-Detail Relationship" as the data type.
6. In the "Related To" field, select "Child".
7. Configure other options as needed (e.g., setting the relationship name and whether it's required).
8. Save the changes.

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 various global buttons are on the right. The main area is titled 'SETUP > OBJECT MANAGER Parent'. On the left, a sidebar lists 'Fields & Relationships' and other setup categories like Page Layouts, Lightning Record Pages, etc. The main content area 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' creation wizard in the Salesforce Object Manager. The top navigation bar and sidebar are identical to the previous screenshot. The main content area is titled 'Parent New Custom Field' and 'Step 1. Choose the field type'. It says 'Specify the type of information that the custom field will contain.' A 'Data Type' section lists several options with descriptions:

- 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.

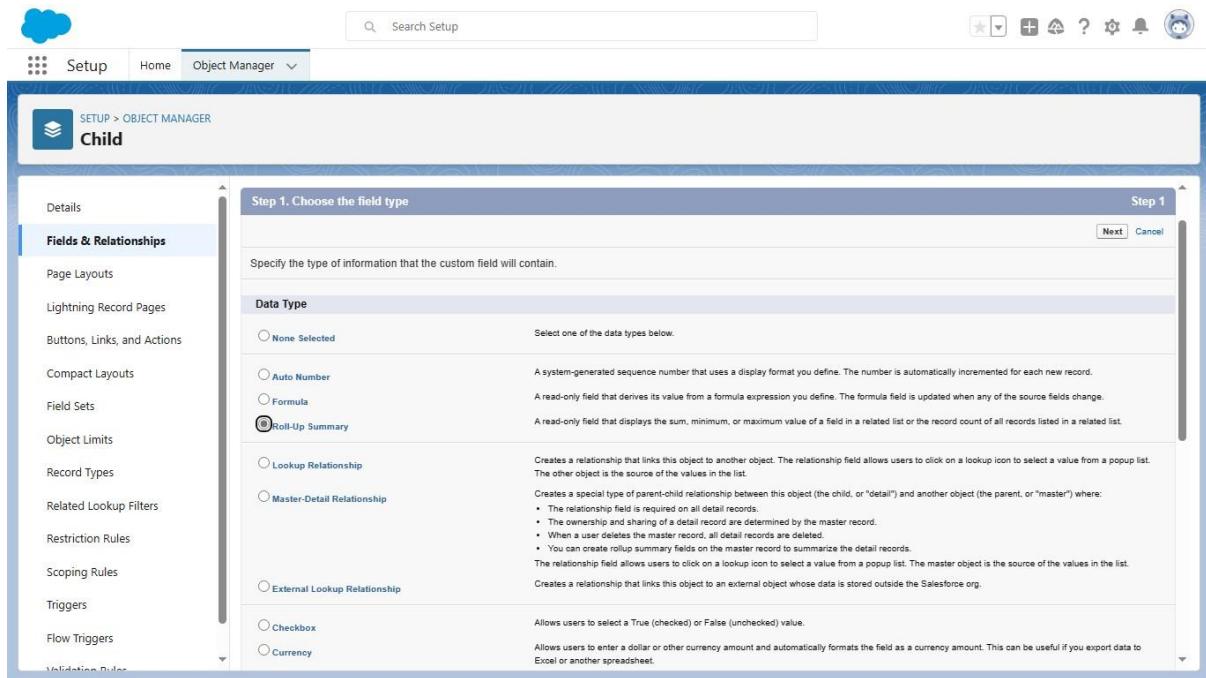
Buttons at the bottom right include 'Next' and 'Cancel'.

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 object configuration options like Page Layouts, Lightning Record Pages, and Fields & Relationships (which is selected). The main content area is titled 'New Relationship' and 'Step 2. Choose the related object'. It asks 'Select the other object to which this object is related.' A dropdown menu shows 'Child' as the selected option. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'. A help link 'Help for this Page' is also present.

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 object configuration 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. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

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 top right include 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. A help link 'Help for this Page' is also present.



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 'User Interface' expanded, with 'Tabs' selected. A search bar at the top right contains the text 'tab'. The main content area displays information about different types of tabs and lists existing tabs:

- Custom Object Tabs**:

Action	Label	Tab Style	Description
Edit Del	Brokers	People	
Edit Del	Childs	Lightning	
Edit Del	Parents	Lightning	
Edit Del	Properties	Real Estate Sign	
- 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.
- Lightning Page Tabs**:

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.

Lightning Experience App Manager

App Name ↑	Developer Name	Description	Last Modified ...	Ap... ↓	Vi... ↓
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	22/08/2023, 11:15 am	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/08/2023, 11:15 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	22/08/2023, 11:15 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for you...	22/08/2023, 11:17 am	Lightning	✓
5 Community	Community	Salesforce CRM Communities	22/08/2023, 11:15 am	Classic	✓
6 Content	Content	Salesforce CRM Content	22/08/2023, 11:15 am	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and man...	22/08/2023, 11:15 am	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/08/2023, 11:15 am	Lightning	✓
9 Dreamhouse	Dreamhouse		29/08/2023, 4:12 pm	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/08/2023, 11:15 am	Lightning	✓
11 Marketing	Marketing	Best-in-class on-demand marketing automation	22/08/2023, 11:15 am	Classic	✓
12 Platform	Platform	The fundamental Lightning Platform	22/08/2023, 11:15 am	Classic	✓
13 Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2023, 11:15 am	Lightning	✓
14 Sales	Sales	The world's most popular sales force automation (SFA) sol...	22/08/2023, 11:15 am	Classic	✓
15 Sales	LightningSales	Manage your sales process with accounts, leads, opportun...	22/08/2023, 11:15 am	Lightning	✓

New Lightning App

App Details & Branding

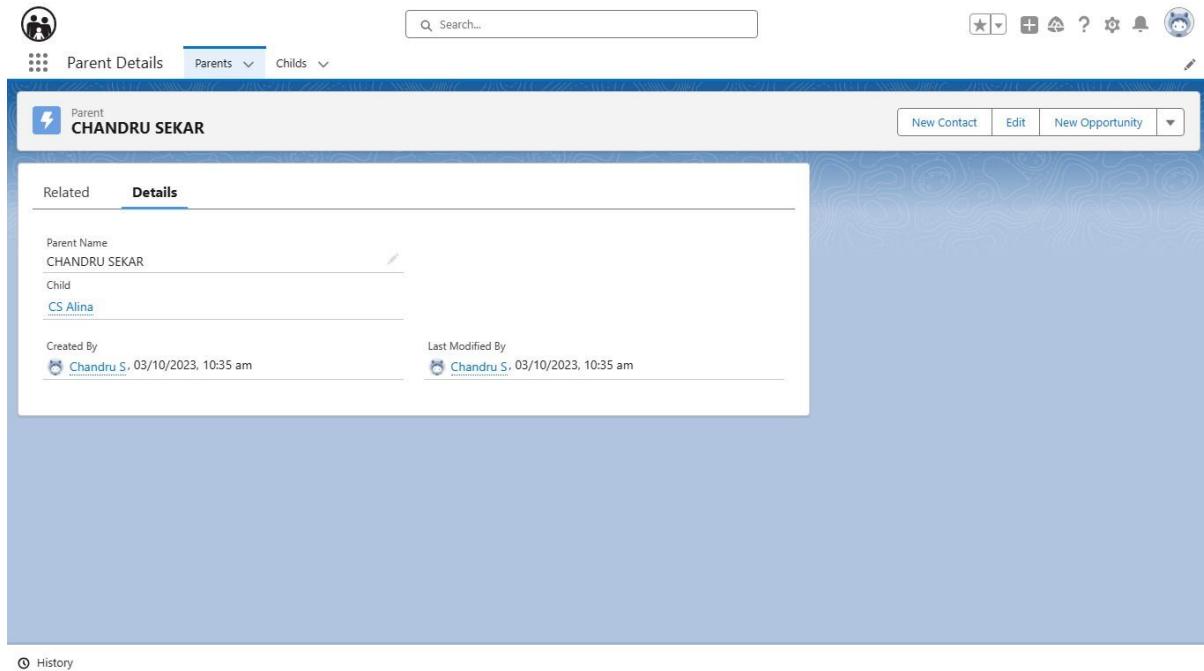
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details	App Branding																		
* App Name <small>i</small> Parent Details	Image <small>i</small> <input type="button" value="Upload"/>																		
* Developer Name <small>i</small> Chandru s	Primary Color Hex Value <small>i</small> #0070D2																		
Description <small>i</small> Enter a description...	Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme																		
App Launcher Preview																			
<table border="1"> <tr><td>13 Queue Management</td><td>QueueManagement</td><td>Create and manage queues for your business.</td><td>22/08/2023, 11:15 am</td><td>Lightning</td><td>✓</td></tr> <tr><td>14 Sales</td><td>Sales</td><td>The world's most popular sales force automation (SFA) sol...</td><td>22/08/2023, 11:15 am</td><td>Classic</td><td>✓</td></tr> <tr><td>15 Sales</td><td>LightningSales</td><td>Manage your sales process with accounts, leads, opportun...</td><td>22/08/2023, 11:15 am</td><td>Lightning</td><td>✓</td></tr> </table>		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	✓
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	✓														

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

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

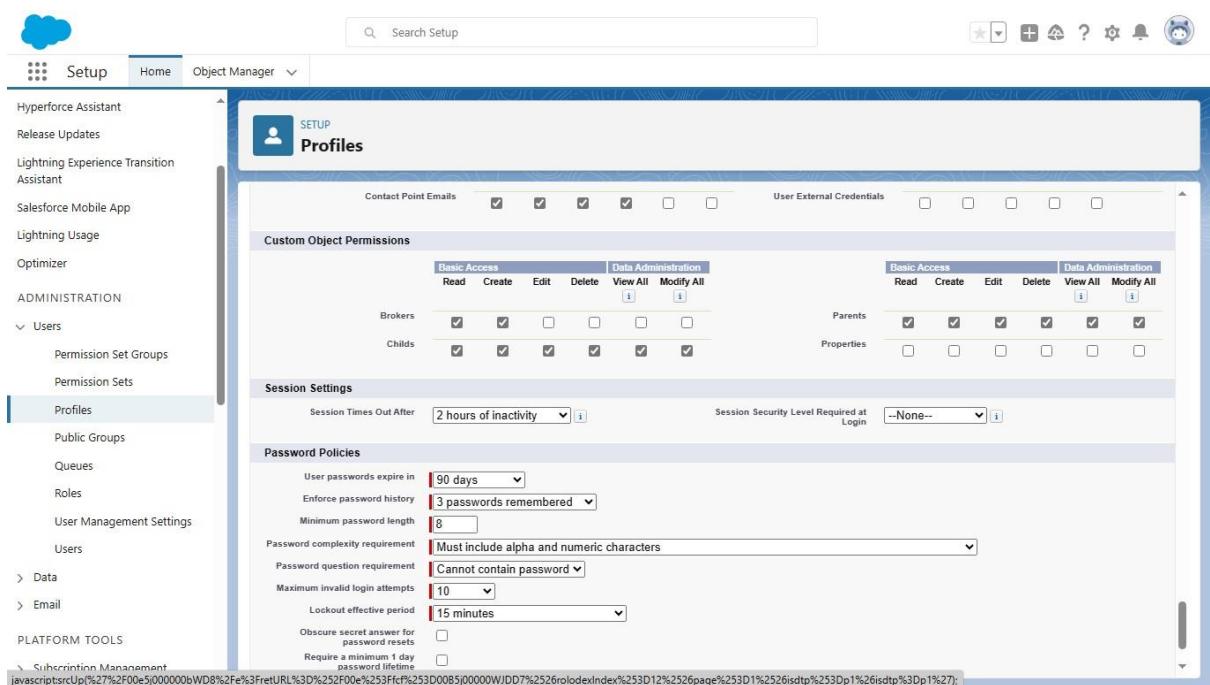
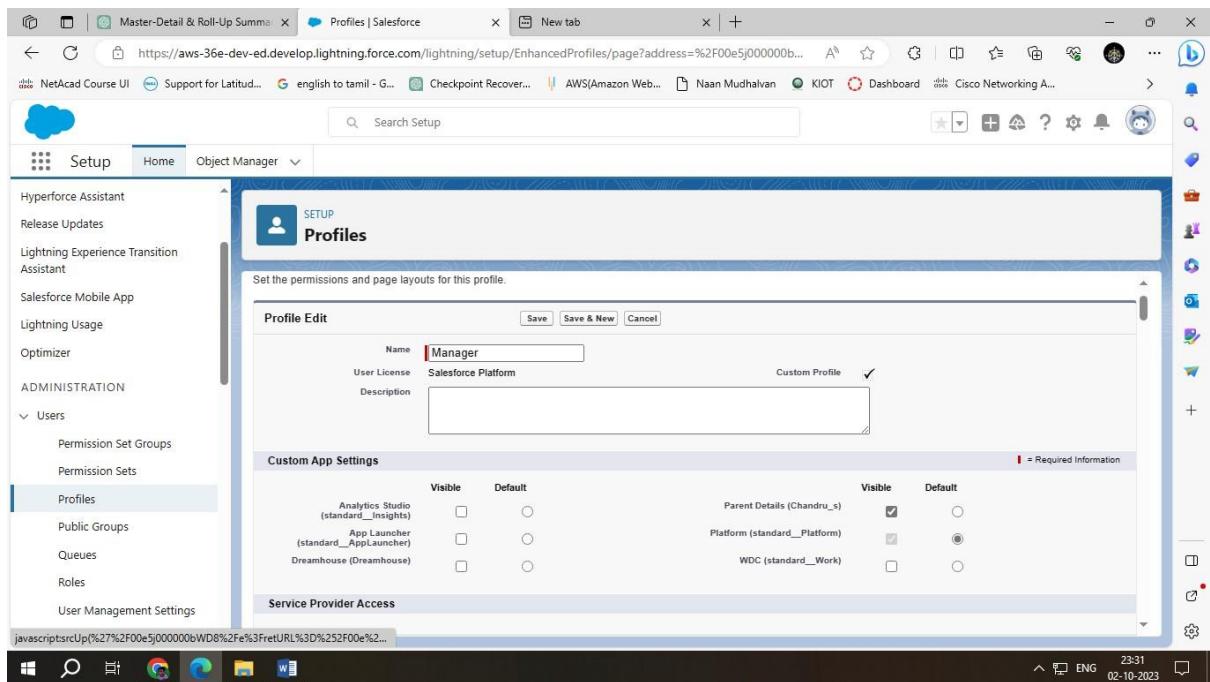
That's it! You've successfully created a Master-Detail relationship between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.



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

Step 1: Create a Public Group

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



Step 2: Create Criteria-Based Sharing Rules

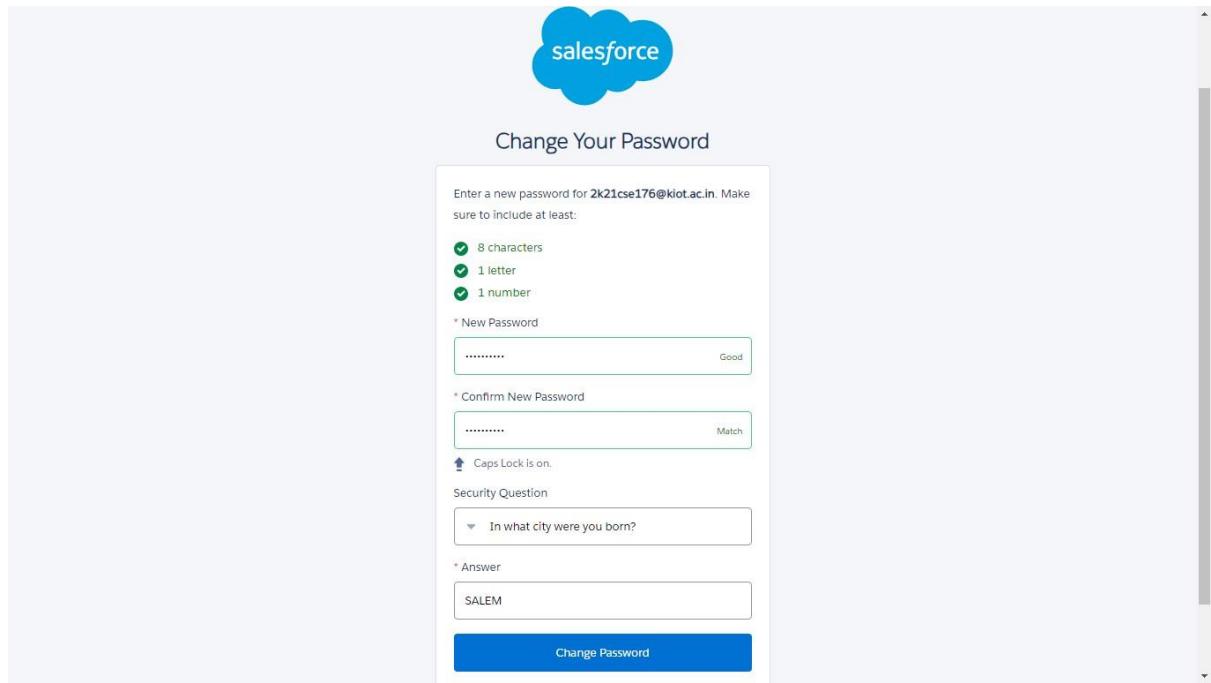
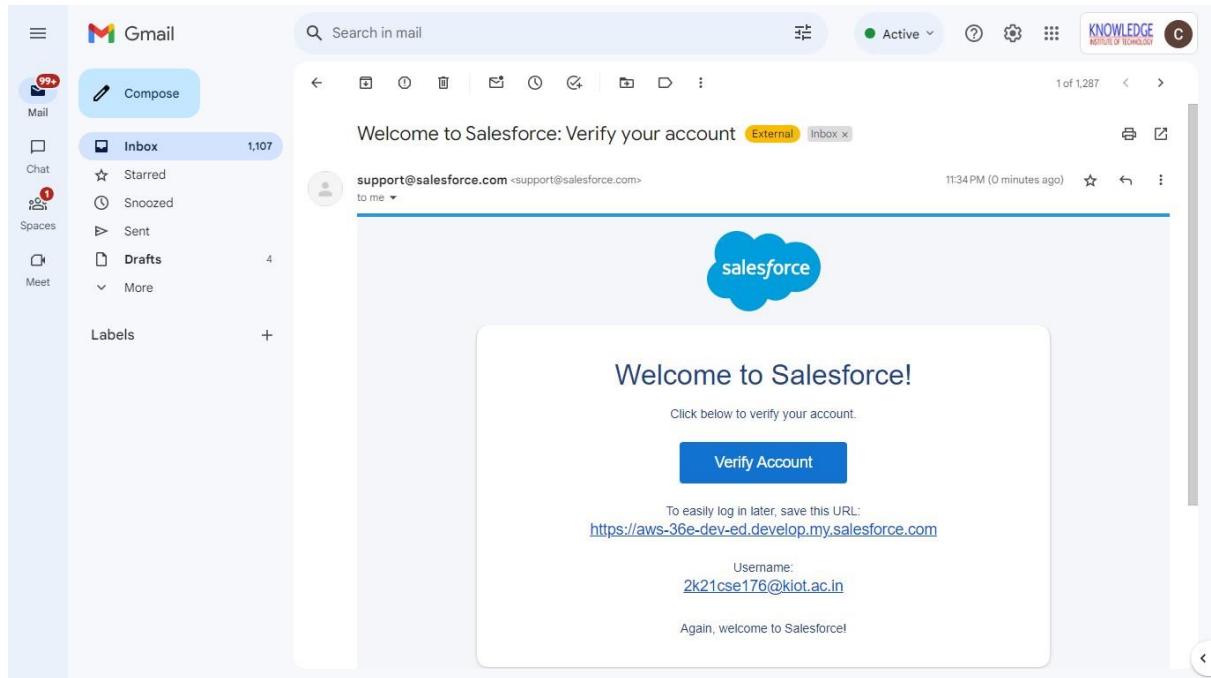
For User A:1. Go to "Setup" in Salesforce.

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.



Profile Edit

Bmanager

Set the permissions and page layouts for this profile.

Profile Edit

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

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Parent Details (Chandru_s)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Dreamhouse (Dreamhouse)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Home Default On Learning

Custom Object Permissions

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

Session Settings

Session Times Out After:

Session Security Level Required at Login:

Password Policies

User passwords expire in:

Enforce password history:

Minimum password length:

Password complexity requirement:

Password question requirement:

Maximum invalid login attempts:

For User B:

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

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

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

4. Save the sharing rule.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A new user record is being created with the following details:

- User Edit**: The 'Save' button is highlighted.
- General Information**:
 - First Name: Sanjay
 - Last Name: P
 - Alias: sp
 - Email: 2k20cse171@kiot.ac.in
 - Username: 2k20cse171@kiot.ac.in
 - Nickname: User1696315620912300622
 - Title: (empty)
 - Company: (empty)
 - Department: (empty)
 - Division: (empty)
- Role**: <None Specified>
- User License**: Salesforce Platform
- Profile**: Bmanager
- Active**: checked
- 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
- Data.com User Type**: -None-
- Data.com Monthly Additional Limit**: Default Limit (300)
- Accessibility Mode (Classic Only)**: unchecked
- High-Contrast Palette on Charts**: unchecked
- Load Lightning Pages While**: (checkbox)

Step 3: Assign Records Ownership

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

- Permission Set**: Create
- Enter permission set information**:
 - Label**: permission
 - API Name**: permission
 - Description**: (empty)
 - Session Activation Required**: unchecked
- Select the type of users who will use this permission set**:
 - Who will use this permission set?
 - Choose '-None-' if you plan to assign this permission set to multiple users with different user and permission set licenses.
 - Choose a specific user license if you want users with only one license type to use this permission set.
 - Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
 - Not sure what a permission set license is? [Learn more here.](#)
 - License**: -None-

Permission Set
permission

Object Name Object Permissions Total Fields Tab Settings

Accounts	No Access	40	--
AI Insight Reasons	No Access	--	--
AI Record Insights	No Access	--	--
Alternative Payment Methods	No Access	27	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--
Application Usage Assignments	No Access	--	--
Appointment Categories	No Access	3	--
Appointment Invitations	No Access	17	--
Appointment Invitees	--	4	--
Appointment Schedule Aggregates	No Access	--	--
Appointment Schedule Logs	No Access	--	--
Appointment Topic Time Slots	No Access	6	--
Asset Actions	No Access	30	--
Asset Action Sources	No Access	18	--
Asset Relationships	--	10	--
Assets	No Access	42	--
	No Access	11	--

Permission Set
permission

Childs Save Cancel

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/> <input type="radio"/>

Object Permissions

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

Field Permissions

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

Setup Home Object Manager

... > PERMISSION SET PERMISSION > MANAGE ASSIGNMENT EXPIRATION

permission

Select Users to Assign

All Users

1 item selected

Full Name	Role	Username	Profile
Chandru S	CS	au611220104303@naanmudhalvan.com	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzikbsrf@chatter.salesforce.com	Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	Analytics Cloud Integration User
Sanjay P	sp	2k22cse171@kiot.ac.in	Bmanager
Security User	sec	insightsecurity@00d5j00000cismqean.com	Analytics Cloud Security User
Sunil A	sa	2k21cse176@kiot.ac.in	Manager

C Cancel Next

Subscription Management aws-36e-dev-ed.lightning.force.com/lightning/r/0055j000009Zv6qAAC/vi...

Setup Home Object Manager

... > PERMISSION SET PERMISSION > MANAGE ASSIGNMENT EXPIRATION

permission

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Sunil A	Manager		✓	Salesforce Platform	Never Expires

Cancel Back Assign

Subscription Management

Setup Home Object Manager

Hyperfector 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

... > PERMISSION SETS permission

Assignment Summary

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

Done

Search Setup

1 assignments were successful.

Setup Home Object Manager

Hyperfector 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

Operating Hours Holidays
Opportunities
Opportunity Contact Role
Opportunity Product
Order Products
Orders
Parents
Party Consents
Payment Authorization Adjustments
Payment Authorizations
Payment Gateway Logs
Payment Gateways
Payment Groups
Payment Line Invoices
Payments
Pending Order Summaries
Pending Order Summary Processed Events
Price Book Entries
Price Books
Privacy Consents
Problem Related Items
Problems
Process Cart Pricing Events
Process Cart Pricing Response Events
Process Exceptions
Product Attributes

	No Access	/	--
Opportunities	No Access	26	--
Opportunity Contact Role	No Access	6	--
Opportunity Product	No Access	14	--
Order Products	No Access	15	--
Orders	No Access	33	--
Parents	No Access	4	--
Party Consents	No Access	18	--
Payment Authorization Adjustments	No Access	24	--
Payment Authorizations	No Access	30	--
Payment Gateway Logs	No Access	--	--
Payment Gateways	No Access	6	--
Payment Groups	No Access	1	--
Payment Line Invoices	No Access	20	--
Payments	No Access	41	--
Pending Order Summaries	No Access	--	--
Pending Order Summary Processed Events	No Access	--	--
Price Book Entries	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	--

javascript:srcSelf("%2FOPSS%000007Uxoi%3Fs%3DentityPermissions%26o%3D0115...")

Search Setup

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

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (Users, Permission Set Groups, Permission Sets), Data, Email, PLATFORM TOOLS, Subscription Management.
- Current Page:** SETUP - Permission Sets
- Content Area:**
 - Permission Set Overview:** permission
 - Parents:** Tab Settings (Available, Visible) - Available is checked.
 - Object Permissions:**

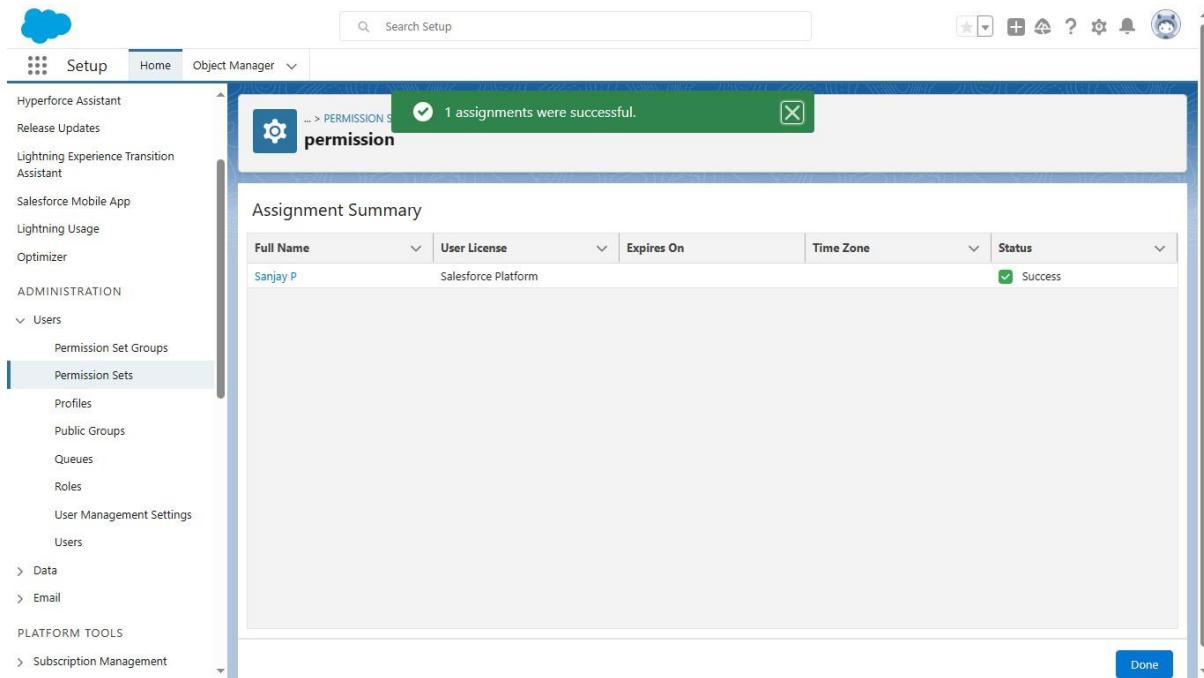
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>
 - Field Permissions:**

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

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

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (Users, Permission Set Groups, Permission Sets), Data, Email, PLATFORM TOOLS, Subscription Management.
- Current Page:** ... > PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION
- Content Area:**
 - Select Users to Assign:** All Users
 - Table:** Shows users assigned to the permission set:

Full Name	Ali...	Username	Role	Ac...	Profile
Chandru S	CS	au611220104303@naanmudhalvan.com	<input checked="" type="checkbox"/>		System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzikibsr@chatter.salesforce.com	<input checked="" type="checkbox"/>		Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
Sanjay P	sp	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>		Bmanager
Security User	sec	insightssecurity@00d5j00000cismqean.com	<input checked="" type="checkbox"/>		Analytics Cloud Security User
 - Buttons:** Cancel, Next



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

Step 1: Create a Permission Set for Delete Access

1. Go to "Setup" in Salesforce.
2. In the Quick Find box, type "Permission Sets" and select it.
3. Click "New Permission Set" to create a new one.
4. Give the permission set a name (e.g., "Delete Access Permission Set").
5. In the "System Permissions" section, find and enable the "Delete" permission for the "Account" object.

6. Save the permission set.

The screenshot shows the Salesforce Setup interface. The left sidebar includes links for Home, Object Manager, Lightning Usage, Optimizer, Administration, and various management tools like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and the current selected 'Users' link. The main content area is titled 'SETUP' and 'Users'. It displays a list of users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The user list includes:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A_Sunil	\$8	2k21cse178@kiot.ac.in		<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty_00d5000000cismoean.eodfzlkbsrf@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter_Free_User
<input type="checkbox"/> Edit	P_Sanjay	\$9	2k22cse171@kiot.ac.in		<input checked="" type="checkbox"/>	Bmanager
<input type="checkbox"/> Edit	S_Chandru	CS	au611220104303@aanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5 00000cismoean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5 00000cismoean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Below the table are buttons for New User, Reset Password(s), and Add Multiple Users. Navigation links at the bottom include 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.

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various system icons.
- Left Navigation Bar:** Groups under "ADMINISTRATION":
 - Optimizer
 - Users
 - Permission Set Groups
 - Permission Sets
 - Profiles** (selected)
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
 - Users
- Sub-navigation:**
 - Data
 - Email
 - PLATFORM TOOLS
 - Subscription Management
 - Apps
 - Feature Settings
 - Slack
 - MuleSoft
 - Finstein
- Page Content:** The "Profiles" page title is displayed. The main area shows a table of profiles with columns: Action, Profile Name, User License, and Custom. The table lists profiles such as "Analytics Cloud Integration User", "Authenticated Website", "Bmanager", etc. A "Help for this Page" link is at the top right.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'ADMINISTRATION' and includes sections for 'Users' (Profiles, Public Groups, Queues, Roles, User Management Settings, Users), 'Data', 'Email', and 'PLATFORM TOOLS'. The 'Profiles' section is currently selected. The main content area is titled 'Clone Profile' and displays a form to clone an existing profile. The form fields include 'Existing Profile' (set to 'Standard Platform User'), 'User License' (set to 'Salesforce Platform'), and 'Profile Name' (set to 'Manager'). A note at the top says 'You must select an existing profile to clone from.' Buttons for 'Save' and 'Cancel' are at the bottom.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous screenshot. The main content area is titled 'Profile Detail' for the profile 'chan'. It shows the profile's details: Name (chan), User License (Salesforce Platform), Description (empty), Created By (Chandru S.), and Modified By (Chandru S.). Below this is a table titled 'Page Layouts' showing standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, and Asset, along with their respective page layout assignments. Buttons for 'Edit', 'Clone', 'Delete', and 'View Users' are at the top of the profile detail section.

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, and various Administration sections like Users, Permission Set Groups, and Profiles. The main content area displays the 'Profiles' configuration screen with tabs for Basic Access, Data Administration, and Session Settings. It includes sections for Brokers, Parents, and Properties, and detailed password policies for User passwords expire in 90 days, Enforce password history (3 passwords remembered), Minimum password length (8), Password complexity requirement (Must include alpha and numeric characters), Password question requirement (Cannot contain password), Maximum invalid login attempts (10), Lockout effective period (15 minutes), Obscure secret answer for password resets, Require a minimum 1 day password lifetime, and Don't immediately expire links in forgot password emails.

The screenshot shows the Salesforce Setup interface with the 'Profile Edit' page for a profile named 'chan'. The left sidebar is identical to the previous screenshot. The main content area shows the 'Profile Edit' screen for 'chan'. It includes fields for Name (chan), User License (Salesforce Platform), and Description. Below these are sections for Custom App Settings, Service Provider Access, and Tab Settings. The 'Custom App Settings' section lists Analytics Studio (standard_Insights), App Launcher (standard_AppLauncher), and Dreamhouse (Dreamhouse) with checkboxes for Visible and Default. The 'Service Provider Access' section lists Parent Details (Chandru_s), Platform (standard_Platform), and WDC (standard_Work) with checkboxes for Visible and Default. The 'Tab Settings' section includes an option to Overwrite users' personal tab customizations and a Standard Tab Settings section where 'Home' is set to 'Default On'.

Screenshot of the Salesforce Lightning Experience showing the 'All Users' page under the 'Users' section of the Setup menu.

Page Header: Master-Detail & Roll-Up Summar... | Users | Salesforce | New tab

Page URL: https://aws-36e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Left Sidebar (ADMINISTRATION - Users):

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users** (selected)
- > Data
- > Email

Content Area:

All Users

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

In addition, download Salesforce to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	A_Sunil	sa	2k2cse176@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager
Edit	Chatter Expert	Chatter	chatty.00d500000cismgean.eodfzikibsr@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Edit	P_Sanjay	sp	2k2cse171@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bmanager
Edit	S_Chandru	CS	su611220104303@naanmudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@00d500000cismgean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d500000cismgean.com	<input checked="" type="checkbox"/>	<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](#)

Screenshot of the Salesforce Setup interface showing the 'New User' creation page under the 'Users' section of the Setup menu.

Page Header: Search Setup

Page URL: https://aws-36e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/new

Left Sidebar (ADMINISTRATION - Users):

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users** (selected)
- > Data
- > Email

Content Area:

New User

Help for this Page

User Edit

General Information		Advanced Options	
First Name	Sunil	Role	<input type="text" value="<None Specified>"/>
Last Name	A	User License	<input type="text" value="Salesforce Platform"/>
Alias	sa	Profile	<input type="text" value="chan"/>
Email	2k2cse176@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	2k2cse176@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User1696321490080232961	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	Male	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	<input type="text" value="<None>"/>
		Data.com Monthly Addition Limit	<input type="text" value="Default Limit (300)"/>
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While	<input type="checkbox"/>

Cloud icon

Setup Home

Search 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 Users

User Sunil A

User Profile Help for this Page

User Detail

Name	Sunil A	Role	Salesforce Platform
Alias	sa	User License	chan
Email	2k20cse176@kiot.ac.in [Verify]	Profile	
Username	2k23cse176@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User16963214900802329619	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	Male	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	2/73 Kankandaipalayam Malasamudram 637503 Tamil Nadu India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Experience ID		High-Contrast Palette on Charts	<input type="checkbox"/> i

Edit Sharing Reset Password Freeze

Site.com Contributor User Site.com Publisher User WDC User Mobile Push Registrations Data.com User Type Accessibility Mode (Classic Only) Debug Mode High-Contrast Palette on Charts

Cloud icon

Setup Home

Search Setup

Home Object Manager

Quick Find

Service Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION

Users

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

SETUP Users

User Edit Sunil A

Help for this Page

User Edit

General Information

First Name	Sunil	Role	<None Specified>
Last Name	A	User License	Salesforce Platform
Alias	sa	Profile	chan
Email	2k20cse176@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	2k21cse176@kiot.ac.in	Marketing User	<input type="checkbox"/>
Nickname	User169631476178576A938	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	Male	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None- i
		Data.com Monthly Addition Limit	300 i
		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
		High-Contrast Palette on Charts	<input type="checkbox"/> i

Save Save & New Cancel

= Required Information

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. On the left, the navigation sidebar includes links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. Under Administration, there are sections for Users, Permission Set Groups, and Permission Sets. The 'Permission Sets' section is currently selected. The main content area displays a 'Permission Set Overview' for 'Permission01'. The 'Edit Properties' dialog is open, showing fields for Label (permission01), API Name (permission01), and Description. The 'Session Activation Required' checkbox is checked. Below the dialog, the 'App Permissions' section lists several permissions: 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), and External Data Source Access (Permissions to authenticate against external data sources). A note at the bottom states: "Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform".

This screenshot shows the 'Accounts' tab under the 'Object Settings' for the 'permission01' permission set. The 'Object Permissions' section contains a table with columns for 'Permission Name' (Read, Create, Edit, Delete, View All, Modify All) and 'Enabled' status. All permissions are currently disabled. The 'Field Permissions' section contains a table with columns for 'Field Name' (Account Name, Account Number, Account Owner, Account Site, Account Source, Active, Annual Revenue) and 'Read Access' and 'Edit Access' checkboxes. Most fields have both access types checked.

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

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

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

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

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

The "Field Permissions" section shows the following table:

Field Name	Read Access	Edit Access
Account Name	<input 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"/>

Video Tutorial | Help for this Page

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

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users, Permission Set Groups, and Permission Sets (which is selected).
- Main Content:** The title is "All Users" with a dropdown arrow. It shows a list of users with the following columns: Full Name, Alias, Username, Role, Access, and Profile. There are two items selected:

Full Name	Alias	Username	Role	Access	Profile
Chandru S	CS	au611220104303@naanmudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzikbsrf@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Sanjay P	sp	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bmanager
Security User	sec	insightssecurity@00d5j00000cismqean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
Sunil A	sa	2k21cse176@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	chan
Sunil A	sa	2k23cse176@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	chan

Search this list...

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 'Selected Users' and displays a table of users assigned to a permission set. The table columns are: Full Name, Role, Profile, Active, User License, and Expires On. Two users, 'Sunil A' and 'Sunil A', are listed, both assigned to the 'chan' profile and having 'Salesforce Platform' user licenses with 'Never Expires' expiration dates. Above the table, there are options for specifying an expiration date (radio buttons for 'No expiration date' and 'Specify the expiration date', with sub-options for 1 Day, 1 Week, 30 Days, 60 Days, and Custom Date) and a 'Time Zone' dropdown. At the bottom right are 'Back' and 'Assign' buttons.

The screenshot shows the Salesforce Setup interface after a permission set has been assigned. A green success message at the top states '... > PERMISSION SETS 2 assignments were successful.' Below it, the title 'permission01' is displayed. The main content area is titled 'Assignment Summary' and shows a table of assigned users. The table columns are: Full Name, User License, Expires On, Time Zone, and Status. Two users, 'Sunil A' and 'Sunil A', are listed, both assigned to the 'Salesforce Platform' user license with 'Never Expires' expiration dates. Both assignments have a status of 'Success'. At the bottom right is a 'Done' button.

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

Step 1: Create a custom object

1.Click Setup.

2.In the Object Manager, click Create | Custom Object.

3. Now create a custom object Survey Result and fields as shown in the screenshot below:

4. Click Save.

The screenshot shows the Salesforce Object Manager interface for the 'Survey Result' object. The top navigation bar includes 'SETUP > OBJECT MANAGER' and the object name 'Survey Result'. Below the header, there's a 'Details' section and a 'Fields & Relationships' section. The 'Fields & Relationships' section is expanded, showing a table of fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains the following data:

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

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

1. Click App Launcher.

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

3. Clicks on the New Email template button.

4. Name the Lightning Email Template and make sure to store it in the Public Email Templates folder.

5. Create a template like the following screenshot

Email Template
Thank You Email - Survey

Details Related

Information

Email Template Name Thank You Email - Survey	Related Entity Type Survey Result
Description	Folder Public Email Templates
Made in Email Template Builder <input checked="" type="checkbox"/>	

Message Content

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

Additional Information

Created By Rakesh Gupta, 12/21/2020, 4:23 PM	Last Modified By Rakesh Gupta, 12/21/2020, 4:32 PM
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Step 3: Create an Email Alert

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

8.Click Save.

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 'Survey Result'. The 'Email Template' is 'Thank You Email - Survey'. The 'Protected Component' checkbox is unchecked. In the 'Recipients' section, there are two panels: 'Available Recipients' (listing 'User: Integration User', 'User: Rakesh Gupta', and 'User: Security User') and 'Selected Recipients' (listing 'Email Field: Email'). A note below says 'You can enter up to five (5) email addresses to be notified.' At the bottom, the 'From Email Address' is set to 'Current User's email address' with an unchecked checkbox for making it the default. The bottom navigation bar includes '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 <div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div>	

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**

Set Field Values for the Survey Result

Field <input type="text" value="Comment__c"/>	Value <input type="text" value="A_a Comment X"/>
Field <input type="text" value="Email__c"/>	Value <input type="text" value="A_a Email > Value X"/>
Field <input type="text" value="Name__c"/>	Value <input type="text" value="={!Name.firstName} {!Name.lastName}"/>
Field <input type="text" value="Rating__c"/>	Value <input type="text" value="A_a Rating X"/>

+ Add Field

Manually assign variables

Step 4.3: Salesforce Flow – Call an Acton – 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 <input type="text" value="Survey"/>	* Flow API Name <input type="text" value="Survey"/>	
Description <div style="border: 1px solid #ccc; height: 50px; margin-top: 5px;"></div>		
Hide Advanced		
How to Run the Flow ⓘ <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">User or System Context—Depends on How Flow is Launched</div> * Type <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Screen Flow</div> * API Version for Running the Flow <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">51</div>		
Interview Label ⓘ <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Insert a resource...</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Survey {!\$Flow.CurrentDateTime}</div>		
Last Modified 12/21/2020, 4:54 PM by Rakesh Gupta		
Status: Active	Type: Screen Flow	Version Number: 2
Cancel Save		

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

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

1.Click Setup | Developer Console

2.Navigate to File | New | Lightning Application

3.Enter a Name (VFPageToLC) field, make sure to select the Lightning Out Dependency App checkbox.

4.Click Submit.

5.Copy code from GitHub and paste it into your Lightning Application.

6.Save your code.

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

VFPageToLC.app *

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

Logs, Tests, and Problems

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	<input type="text" value=""/>
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

*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.