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Salesforce Developer
Assignment no 1

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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

1. Log in to your Salesforce Developer account.
2. Go to Setup by clicking on your profile picture and selecting "Setup."
3. In the Quick Find box, type "Objects" and select "Objects and Fields" > "Objects."
4. Click on "New Custom Object" to create both "Parent_c" and "Child_c."

Step 2: Create Fields

For the "Child_c," you'll need to create a Master-Detail relationship field that references the "Parent_c" and a Roll-Up Summary field to calculate the total number of related records.

Create the Master-Detail Relationship Field:

1. In "Setup," go to "Objects and Fields" > "Object Manager."
2. Click on "Child_c" to edit it.
3. In the left sidebar, click on "Fields & Relationships."
4. Click "New" to create a new custom field.
5. Choose the "Master-Detail Relationship" data type.
6. Choose "Parent_c" as the related object.
7. Configure other settings and save the field.

Create the Roll-Up Summary Field:

1. In the "Fields & Relationships" section for "Parent_c," click "New" again.
2. Choose the "Roll-Up Summary" data type.
3. Configure the field to count the number of related "Child_c" records.
4. Save the Roll-Up Summary field.

Step 3: Create Records

Now, you can create records for both custom objects and establish relationships between them. For example, create several "Parent_c" records and associate multiple "Child_c" records to each parent record.

Step 4: View the Roll-Up Summary Field

Once you have created records and established relationships, you can view the Roll-Up Summary field on the "Parent_c" record detail page. It will display the total number of related "Child_c" records for that particular parent record.

Step 1: Create Custom Objects

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

- Header:** Search bar with "Search Setup".
- Top Navigation:** Cloud icon, "Setup", "Home", "Object Manager".
- Left Sidebar:** "OBJECT MANAGER" section with "Parent" selected. Other options include "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", and "Flow Triggers".
- Right Panel:**
 - Custom Object Definition Edit:** "Save", "Save & New", "Cancel".
 - Custom Object Information:**
 - Label: Parent (Example: Account)
 - Plural Label: Parents (Example: Accounts)
 - Starts with vowel sound:
 - The Object Name is used when referencing the object via the API.
 - Object Name: Parent (Example: Account)
 - Description: (Empty text area)
 - Context-Sensitive Help Setting: Radio buttons for "Open the standard Salesforce.com Help & Training window" (selected) and "Open a window using a Visualforce page".
 - Content Name:
 - 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 (dropdown menu)

The screenshot shows the Salesforce Setup Object Manager interface for creating a new custom object named "Child".

Custom Object Information:

- Label:** Child (Example: Account)
- Plural Label:** Childs (Example: Accounts)
- Starts with vowel sound:**

Description: (Empty text area)

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window (radio button selected)

Content Name: (None)

Enter Record Name Label and Format:

- Record Name:** Child Name (Example: Account Name)
- Data Type:** Text

Object 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

Step 2: Create a Master-Detail Relationship

The screenshot shows the Salesforce Setup Object Manager interface for viewing the fields and relationships of the "Parent" object.

Fields & Relationships:

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)	✓	▼

Object Details:

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Cloud icon

Search Setup

Setup Home Object Manager

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

Help for this Page

Step 1

Next Cancel

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Cloud icon

Search Setup

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

Help for this Page

Step 2 of 6

Previous Next Cancel

Select the other object to which this object is related.

Related To Child

Previous Next Cancel

SETUP > OBJECT MANAGER
Child

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)		

SETUP > OBJECT MANAGER
Child

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 pop-up 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.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox Allows users to select a True (checked) or False (unchecked) value.
- Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Step 3: Create a Roll-Up Summary Field

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Brokers	People	
Edit Del	Chilids	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

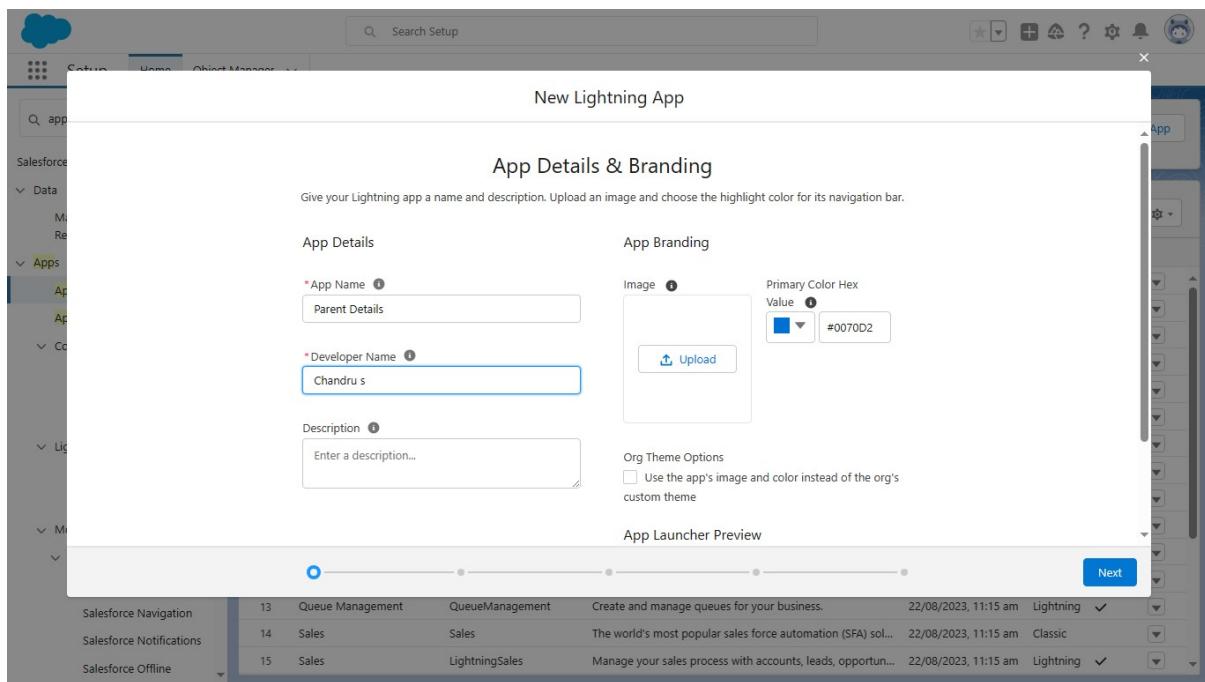
Lightning Page Tabs

Action	Label	Tab Style	Description

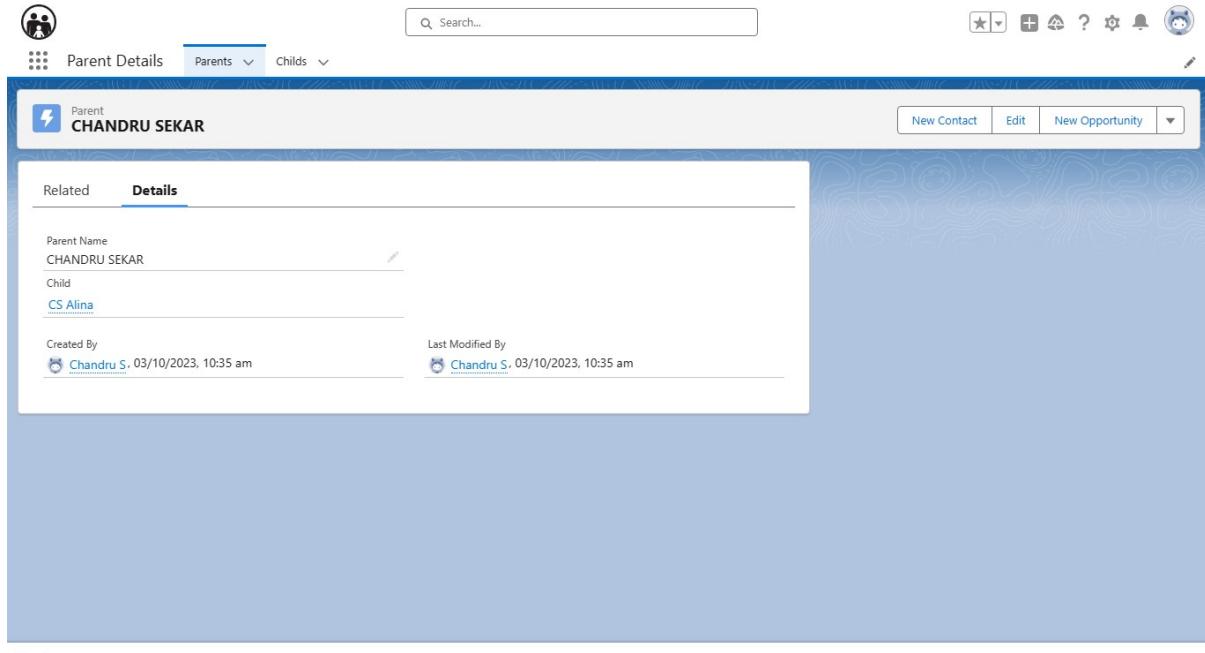
Step 4: Update Page Layouts and Record Types (if necessary)

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

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



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



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 the Security for the users.

Step 1: Create Sharing Rules

- Log in to your Salesforce account as an Administrator.
- Go to Setup by clicking on your profile picture and selecting "Setup."
- In the Quick Find box, type "Sharing Settings" and select "Sharing Settings."
- Under "Object Settings," find and click on "Account."
- Click on the "New" button next to "Sharing Rules."

Step 2: Create a Criteria-Based Sharing Rule for User A

For User A (assuming User A is identified by some criteria, like a profile or a custom field), you will create a sharing rule that shares records with User A.

- In the "Share with" section, select "Role and Subordinates."
- Choose the appropriate role for User A or a specific public group that includes User A.
- Define the sharing rule criteria. For example, if User A is identified by a custom field called "User_Type__c," you can create a rule like:
- Field: Account:User_Type__c
- Operator: Equals
- Value: User A
- Save the sharing rule.

Step 3: Create a Criteria-Based Sharing Rule for User B

Repeat the same process for User B, creating a criteria-based sharing rule that shares records with User B.

- In the "Share with" section, select "Role and Subordinates."
- Choose the appropriate role for User B or a specific public group that includes User B.
- Define the sharing rule criteria based on how User B is identified. For example:
- Field: Account:User_Type__c
- Operator: Equals
- Value: User B
- Save the sharing rule.

Step 4: Adjust Default Access

To make sure that users who don't meet the criteria specified in the sharing rules don't have access to those records, adjust the default access settings:

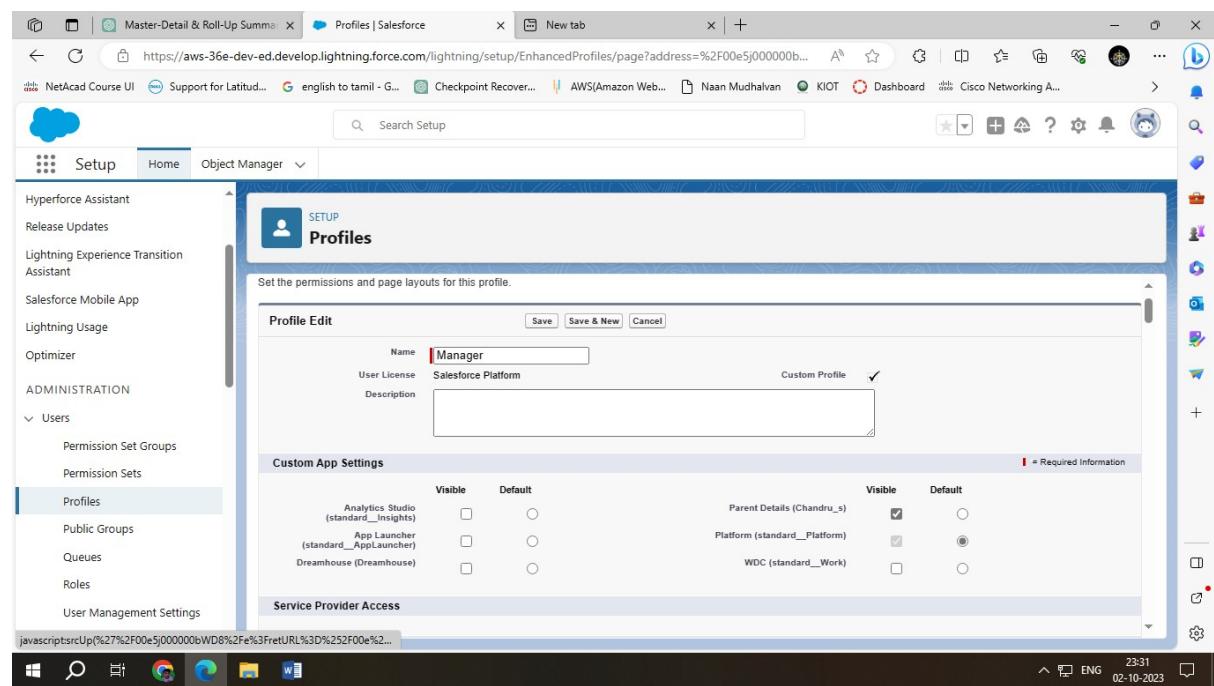
- In "Setup," go to "Objects and Fields" > "Object Manager."
- Click on "Account" to edit it.
- In the left sidebar, click on "Security."
- Under "Organization-Wide Defaults," set the default access level for the Account object to "Private." This ensures that records are private by default.
- Save the changes.

Step 5: Test the Security Settings

Now, User A should only see records that match the User A criteria, and User B should only see records that match the User B criteria. Make sure to thoroughly test these security settings with both User A and User B accounts to ensure that they can only access the records they are supposed to.

By following these steps and creating sharing rules based on criteria, you can restrict access to specific records for User A and User B in the Account object in Salesforce, ensuring that they cannot see each other's records.

Step 1: Create a Public Group



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users), Data (Email), and Platform Tools (Subscription Management). The main content area displays the 'Profiles' setup page with sections for Custom Object Permissions, Session Settings, and Password Policies.

Step 2: Create Criteria-Based Sharing Rules

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users), Data (Email), and Platform Tools (Subscription Management). The main content area displays the 'New User' setup page, which is part of the 'User Edit' section. It shows fields for General Information (First Name: Sunil, Last Name: A, Alias: sa, Email: 2k20cse176@kiot.ac.in, Username: 2k21cse176@kiot.ac.in, Nickname: User169631476178576A938, Title: , Company: Male, Department: , Division:), Role (<None Specified>), User License (Salesforce Platform), Profile (Manager), Active (checked), and various other user settings like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (None), Data.com Monthly Additional Limit (Default Limit (300)), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, and Load Lightning Pages While.

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

Setup Home Object Manager ▾

Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer

ADMINISTRATION

Users

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

PLATFORM TOOLS

> Subscription Management

SETUP Users

User Sunil A

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

User Detail

Name	Sunil A	Role	Salesforce Platform Manager
Alias	sa	User License	
Email	2k20cse176@kiot.ac.in [Verify] i	Profile	Manager
Username	2k21cse176@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User169631476178576A93816 i	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	2/3 Bankanda(p.o) 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
Perfomance ID		Ninth-Contract Palette on Charts	<input type="checkbox"/>

Profile Edit

Bmanager

Name: Bmanager
User License: Salesforce Platform
Description:

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Parent Details (Chandru_s)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Dreamhouse (Dreamhouse)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings: Home Default On

Contacts

	Read	Create	Edit	Delete	View All	Modify All	
Contact Point Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Push Topics

	Read	Create	Edit	Delete	View All	Modify All	
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10

For User B:

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'New User' page. The 'User Edit' form contains the following data:

Field	Value
First Name	Sanjay
Last Name	P
Alias	sp
Email	2k20cse171@kiot.ac.in
Username	2k22cse171@kiot.ac.in
Nickname	User1696315620912300622
Title	
Company	
Department	
Division	
Role	<None Specified>
User License	Salesforce Platform
Profile	Bmanager
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	--None--
Data.com Monthly Additional Licenses	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"/>

Step 3: Assign Records Ownership

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. The main content area displays the 'Create Permission Set' page. The 'Enter permission set information' section contains the following data:

Field	Value
Label	permission
API Name	permission
Description	

The 'Select the type of users who will use this permission set' section includes the following notes:

- 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.

The 'Not sure what a permission set license is? Learn more here.' link is present. The 'License' dropdown is set to '--None--'.

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.
- Page Header:** Shows "Setup", "Home", "Object Manager", and a search bar.
- Page Title:** "Permission Sets" under the "SETUP" tab.
- Section:** "Permission Set permission".
- Sub-section:** "Object Settings".
- Table:** Displays object permissions for various objects like Accounts, AI Insight Reasons, Alternative Payment Methods, etc. The table includes columns for Object Name, Object Permissions, Total Fields, and Tab Settings.
- Bottom:** A JavaScript error message: "javascript:srcSelf(%2FOP5\$000007Uxo%3Fs%3DEntityPermissions%26o%3DapiA...)"

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

- Left Navigation Bar:** Same as the first screenshot.
- Page Header:** Shows "Setup", "Home", "Object Manager", and a search bar.
- Page Title:** "Permission Sets" under the "SETUP" tab.
- Section:** "Permission Set permission".
- Sub-section:** "Childs".
- Form:** "Tab Settings" section with "Available" and "Visible" columns. Under "Visible", there is a checkbox for "Childs" which is checked.
- Table:** "Object Permissions" table with columns for Permission Name and Enabled. All permissions (Read, Create, Edit, Delete, View All, Modify All) are checked.
- Table:** "Field Permissions" table with columns for Field Name, Read Access, and Edit Access. Under "Read Access", checkboxes are checked for "Child Name" and "Created By". Under "Edit Access", checkboxes are checked for "Child Name" and "Created By".
- Bottom:** A JavaScript error message: "javascript:srcUp(%2FOP5\$000007Uxo%3Fe%3Fs%3DEntityPermissions%26o%3D015j000002rl5b%26isotp%3Dp1);"

Setup Home Object Manager > PERMISSION SET > PERMISSION > MANAGE ASSIGNMENT EXPIRATION

permission

Select Users to Assign

All Users

Full Name	Role	Username	Profile
Chandru S	CS	au611220104303@naanmudhalvan.com	System Administrator
Chatter Expert	Chatter	chatty.00d5j00000cismqean.eodfzlkbsrf@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	insightssecurity@00d5j00000cismqean.com	Analytics Cloud Security User
Sunil A	sa	2k21cse176@kiot.ac.in	Manager

Cancel Next

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

Setup Home Object Manager

Hyperfence 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

1 assignments were successful.

Assignment Summary

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

Done

Setup Home Object Manager

Hyperfence 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

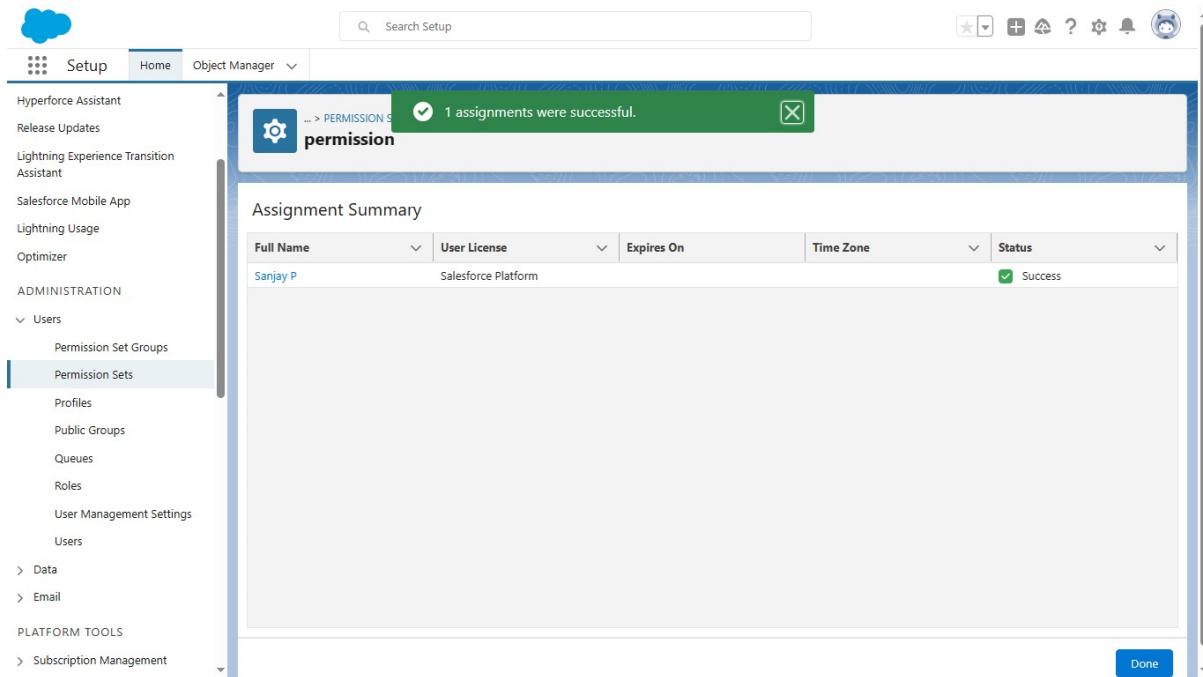
Operating_Hours_Holidays
Opportunities
Opportunity_Contact_Role
Opportunity_Product
Order_Products
Orders
Parents
Party_Consents
Payment_Authorization_Adjustments
Payment_Authorizations
Payment_Gateway_Logs
Payment_Gateways
Payment_Groups
Payment_Line_Invoices
Payments
Pending_Order_Summaries
Pending_Order_Summary_Processed_Events
Price_BookEntries
Price_Books
Privacy_Consents
Problem_Related_Items
Problems
Process_Cart_Pricing_Events
Process_Cart_Pricing_Response_Events
Process_Exceptions
Product_Attributes
Product_Attribute_Set_Products

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

- Left Sidebar:** Includes links for Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (Users, Permission Set Groups, Permission Sets), Data, Email, and Platform Tools.
- Top Bar:** Features a cloud icon, "Setup", "Home", "Object Manager", a search bar, and various navigation icons.
- Page Header:** "SETUP" and "Permission Sets".
- Page Content:**
 - Permission Set Overview:** Shows a "permission" entry with options to "Clone", "Edit Properties", or "Manage Assignments".
 - Parents:** A table showing "Available" and "Visible" status for profiles.
 - Tab Settings:** A table for "Object Permissions" with columns "Permission Name" and "Enabled". Items include Read (checked), Create (checked), Edit (unchecked), Delete (unchecked), View All (unchecked), and Modify All (unchecked).
 - Object Permissions:** A table for "Field Permissions" with columns "Field Name", "Read Access", and "Edit Access". Items include Child (both unchecked) and Created By (both checked).
- Page Footer:** A URL link: <https://aws-36e-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/0P55j000007Uxo/e?e=EntityPermissions&o=011j000002rl5H&isdtp=p1>.

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

- Left Sidebar:** Same as the previous screenshot, including the "Permission Sets" link.
- Top Bar:** Same as the previous screenshot.
- Page Header:** "... > PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION" and "permission".
- Page Content:**
 - Select Users to Assign:** A list titled "All Users" with a dropdown arrow. It shows one item selected: "Sanjay P".
 - Search Bar:** "Search this list..." with filters for "Role", "Access", and "Profile".
 - User List:** A table with columns: Full Name, Alias, Username, Role, Access, and Profile. It lists five users:
 - 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, insightssecurity@00d5j00000cismqean.com, Analytics Cloud Security User)
 - Buttons:** "Cancel" and "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

Since both users currently have the same profile and you want to grant additional permissions to one of them, you can create a Permission Set to grant delete access. Here are the steps:

- Log in to Salesforce as an Administrator.
- Go to Setup by clicking on your profile picture and selecting "Setup."
- In the Quick Find box, type "Permission Sets" and select "Permission Sets."
- Click the "New Permission Set" button.
- Fill out the necessary information, including the Label and API Name.
- In the "App Permissions" section, click "Edit."

- Enable the "Delete" permission for the Account object.
- Save the Permission Set.

Step 2: Assign the Permission Set

Now, you need to assign the Permission Set to the user who should have delete access. Follow these steps:

- While still in the Permission Set detail page, click on the "Manage Assignments" button.
- Click the "Add Assignments" button.
- Search and select the user who should have delete access.
- Save the assignment.

Step 3: Verify User Access

At this point, the user you assigned the Permission Set to will have delete access to the Account object. The other user with the same profile will still have Create, Read, and Edit access but not delete access.

Step 1: Create a Permission Set for Delete Access

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	A_Sunil	sa	2k21cse176@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d5f000000cismgean.eodfzklbrrf@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	P_Sanjay	sp	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bmanager
<input type="checkbox"/>	S_Chandru	CS	su611220104303@naannmudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	Integration@00d5f000000cismgean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d5f000000cismgean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar is titled "ADMINISTRATION" and includes sections for Users, Permission Set Groups, Permission Sets, and Profiles (which is currently selected). The main content area is titled "Profiles" and displays a table of existing profiles. The columns are "Action", "Profile Name", and "User License". The "User License" column contains values like "Analytics Cloud Integration User", "Authenticated Website", "Salesforce Platform", etc. A "Custom" checkbox is present in the first row. The table has a header row with letters A through Z and an "All" option. At the bottom of the table, there are navigation links for "Previous" and "Next", and a page indicator "Page 1 of 2".

The screenshot shows the "Clone Profile" page in the Salesforce Setup. The left sidebar is identical to the previous screenshot. The main content area is titled "Clone Profile" and contains a form. The instructions say "You must select an existing profile to clone from." The form fields include "Existing Profile" (set to "Standard Platform User"), "User License" (set to "Salesforce Platform"), and "Profile Name" (set to "Manager"). There are "Save" and "Cancel" buttons at the bottom. A note at the top right indicates that the "Profile Name" field is required.

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

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** (selected)
- Public Groups
- Queues
- Roles
- User Management Settings

SETUP Profiles

Profile chan

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	chan	User License	Salesforce Platform	Custom Profile	
Description		Created By	Chandru S. 03/10/2023, 1:50 pm	Modified By	Chandru S. 03/10/2023, 1:50 pm

Page Layouts

Standard Object Layouts

Object	Layout	Assignment	Order	Product	Payment	Authorization	Adjustment	Gateway
Global	Global Layout	[View Assignment]						
Email Application	Not Assigned	[View Assignment]						
Home Page Layout	Home Page Default	[View Assignment]						
Account	Account Layout	[View Assignment]						
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]						
Appointment Invitation	Appointment Invitation Layout	[View Assignment]						
Asset	Asset Layout							

The screenshot shows the Salesforce Setup interface under the Profiles section. On the left, the navigation bar includes links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings). The Profiles link is currently selected.

The main content area displays the 'Profiles' setup page. It features two tabs at the top: 'Basic Access' and 'Data Administration'. Under 'Basic Access', there are sections for 'Brokers' and 'Childs' with checkboxes for Read, Create, Edit, Delete, View All, and Modify All. Under 'Data Administration', there are sections for 'Parents' and 'Properties' with similar checkboxes. Below these tabs are 'Session Settings' and 'Password Policies' sections. In the 'Session Settings' section, 'Session Times Out After' is set to '2 hours of inactivity' and 'Session Security Level Required at Login' is set to 'None'. In the 'Password Policies' section, various requirements are defined: User passwords expire in 90 days, 3 passwords remembered, minimum password length 8, must include alpha and numeric characters, 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 do not immediately expire links in forgot password emails.

This screenshot shows the 'Profile Edit' page for a profile named 'chan'. The left sidebar is identical to the one in the previous screenshot, showing the same navigation links and the 'Profiles' link being selected.

The main content area shows the 'Profile Edit' form for the 'chan' profile. At the top, it has fields for Name (set to 'chan'), User License (set to 'Salesforce Platform'), and Description (a blank text area). A 'Custom Profile' checkbox is checked. Below this is a 'Custom App Settings' section with tables for 'Visible' and 'Default' status for various apps. The 'Analytics Studio (standard__Insights)' app is set to 'Visible' (unchecked) and 'Default' (radio button selected). The 'App Launcher (standard__AppLauncher)' app is set to 'Visible' (unchecked) and 'Default' (radio button selected). The 'Dreamhouse (Dreamhouse)' app is set to 'Visible' (unchecked) and 'Default' (radio button selected). To the right of these tables are 'Parent Details (Chandru_s)', 'Platform (standard__Platform)', and 'WDC (standard__Work)' with their respective checkboxes and radio buttons. Below this is a 'Service Provider Access' section, followed by a 'Tab Settings' section where the 'Overwrite users' personal tab customizations' checkbox is unchecked. At the bottom, there are 'Standard Tab Settings' for 'Home' and 'Default On', and a 'Learning' section with a dropdown set to 'Default On'.

All Users

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	A_Sunil	sa	2k21cse176@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Edit	Chatter Expert		chatty.0065 00000cismoean.eodfzkiibsr@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	P_Sanjay	sa	2k22cse171@kiot.ac.in	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bmanager
<input type="checkbox"/> Edit	S_Chandru	CS	au611220104303@naannmudhalvan.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5 00000cismgean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00d5 00000cismoean.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

User Edit

General Information

First Name	Sunil	Role	<None Specified>
Last Name	A	User License	Salesforce Platform
Alias	sa	Profile	chan
Email	2k21cse176@kiot.ac.in	Active	<input checked="" type="checkbox"/>
Username	2k21cse176@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	<None>
		Data.com Monthly Addition Limit	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"/>

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'Sunil A'. The page includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, and various User License Profile checkboxes. The 'Role' section shows 'Salesforce Platform' assigned. The 'User License Profile' dropdown is set to 'chan'. The 'Active' checkbox is checked. The 'Nickname' field contains the value 'User16963214900802329619'. The 'Email' field contains '2k20cse176@kiot.ac.in' with a '(Verify)' link. The 'Username' field contains '2k20cse176@kiot.ac.in'. The 'Nickname' field contains 'User16963214900802329619'. The 'Title' field is empty. The 'Company' field contains 'Male'. The 'Department' field is empty. The 'Division' field is empty. The 'Address' field contains '2/73 Kolankonda(p.o) Muthamudram 637503 Tamil Nadu India'. The 'Time Zone' field is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The 'Locale' field is 'English (India)'. The 'Language' field is 'English'. The 'Delegated Approver' field is empty. The 'Manager' field is empty. The 'Receive Approval Request Emails' field is 'Only if I am an approver'. The 'Federation ID' field is empty.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Edit' page for a user named 'Sunil A'. The page includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Role, User License Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, and Load Lightning Pages While. The 'First Name' field contains 'Sunil'. The 'Last Name' field contains 'A'. The 'Alias' field contains 'sa'. The 'Email' field contains '2k20cse176@kiot.ac.in'. The 'Username' field contains '2k20cse176@kiot.ac.in'. The 'Nickname' field contains 'User16963214900802329619'. The 'Title' field is empty. The 'Company' field contains 'Male'. The 'Department' field is empty. The 'Division' field is empty. The 'Role' dropdown is set to '<None Specified>'. The 'User License Profile' dropdown is set to 'Salesforce Platform'. The 'Profile' dropdown is set to 'chan'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Data.com User Type' dropdown is set to 'None'. The 'Data.com Monthly Addition Limit' dropdown is set to '300'. The 'Accessibility Mode (Classic Only)' checkbox is unchecked. The 'High-Contrast Palette on Charts' checkbox is unchecked. The 'Load Lightning Pages While' dropdown is empty.

Step 2: Assign the Permission Set to the User Needing Delete Access

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-options for Users, Permission Set Groups, and Permission Sets). The 'Permission Sets' option is selected. The main content area is titled 'Permission Sets' and shows a list of existing permission sets. A modal window titled 'Edit Properties' is open over a specific permission set named 'permission01'. The modal contains fields for 'Label' (set to 'permission01'), 'API Name' (set to 'permission01'), and 'Description'. It also includes sections for 'Session Activation Required' (unchecked) and 'Activation Required' (unchecked). Below the modal, a list of permissions is shown, including 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', and 'External Data Source Access'. At the bottom of the modal are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous screenshot, with the 'Permission Sets' option selected. The main content area is titled 'Permission Sets' and shows a list of existing permission sets. One permission set, 'permission01', is selected and its details are displayed. The 'Object Settings' dropdown is set to 'Accounts'. The 'Object Permissions' section shows a table where checkboxes indicate permission levels for various actions (Read, Create, Edit, Delete, View All, Modify All) on the Account object. The 'Field Permissions' section shows a table for specific fields like Account Name, Account Number, Account Owner, etc., with checkboxes for Read Access and Edit Access. At the bottom of the page, there are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar is collapsed, and the main area displays the 'permission01' permission set. The page includes a navigation bar with 'Find Settings...', 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments' buttons. Below this is a breadcrumb trail: 'Permission Set Overview > Object Settings > Accounts'. The 'Accounts' section is selected, showing 'Object Permissions' and 'Field Permissions' tables. The 'Object Permissions' table lists permissions like Read, Create, Edit, Delete, View All, and Modify All, all of which are checked. The 'Field Permissions' table lists field names like Account Name, Account Number, Account Owner, Account Site, Account Source, Active, and Annual Revenue, with checkboxes for Read Access and Edit Access.

The screenshot shows the Salesforce Setup interface with the 'All Users' page open. The left sidebar is collapsed, and the main area displays a list of users. The table columns include Full Name, Alias, Username, Role, Ac..., Profile, and several checkboxes. Two users are selected: 'Chandru S' and 'Sunil A'. The 'Profile' column shows 'System Administrator' and 'chan' respectively. The 'Role' column shows 'Chatter Free User' and 'Analytics Cloud Security User'. The 'Ac...' column shows 'Bmanager' and 'Analytics Cloud Integration User'. The 'Profile' column also contains dropdown menus. At the bottom right of the table, there are 'Cancel' and 'Next' buttons.

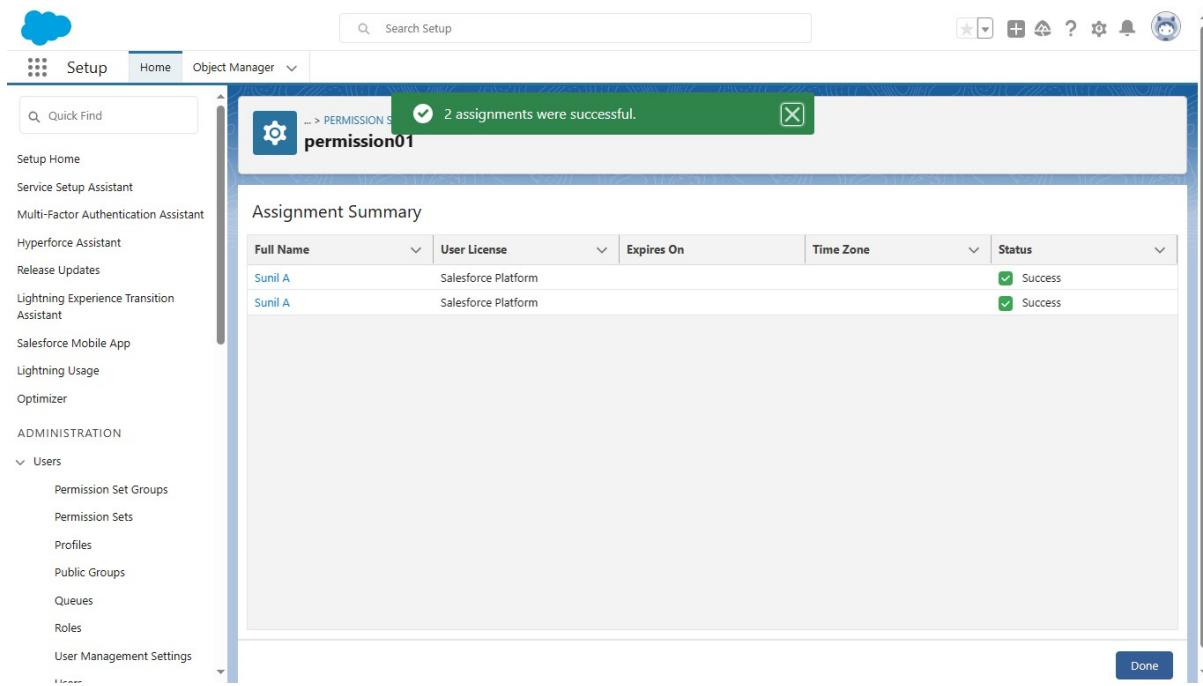
The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes sections for Quick Find, Home, Object Manager, and various administrative tools like Service Setup Assistant and Multi-Factor Authentication Assistant. Under "ADMINISTRATION", the "Users" section is expanded, showing sub-options: Permission Set Groups, **Permission Sets**, Profiles, Public Groups, Queues, Roles, and User Management Settings. The "Permission Sets" option is currently selected.

The main content area displays a configuration screen for assigning permission sets. It includes options for setting an expiration date (radio buttons for "No expiration date" and "Specify the expiration date" with a dropdown menu for "Time Zone" and "Select a time zone...").

A table titled "Selected Users" lists two users assigned to the permission set:

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

At the bottom right of the main area are "Cancel", "Back", and "Assign" buttons.



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

Step 1: Access Lightning Flow Builder

- Log in to your Salesforce account.
- Click on the "App Launcher" (grid icon) in the upper-left corner and search for "Flow."
- Click on "Flows" under "Process Automation" to access Lightning Flow Builder.

Step 2: Create a New Flow

- Click on the "New Flow" button.
- Give your flow a name, such as "Survey Flow."
- Choose the "Screen Flow" option, as you'll be using screens to gather survey information.

- Click on the "Create" button.

Step 3: Add a Screen Element

In your survey flow, you'll use screen elements to collect user input.

- In the Flow canvas, drag and drop a "Screen" element from the palette on the left onto the canvas.
- Double-click on the screen element to configure it.
- In the "Label" field, provide a title for your survey screen, like "Survey Introduction."
- Add any explanatory text in the "Screen Help Text" field if needed.
- Click the "Next" button to move to the next screen element or create a new screen for the first question.

Step 4: Add Survey Questions

For each survey question, you'll create a new screen element:

- Drag and drop a "Screen" element onto the canvas for the first question.
- Configure the screen element by giving it a label, like "Question 1," and providing the question text in the "Screen Help Text" field.
- Add input fields or components that correspond to your survey question. For example, you can use "Text" components for short text answers, "Radio Buttons" for single-choice questions, or "Checkboxes" for multiple-choice questions.
- Set variables to capture the responses. For each input field, click on it, go to the "General Info" section, and assign it to a new or existing variable.
- Click the "Next" button to add more questions/screens as needed.

Step 5: Add a Finish Screen

Once you've added all survey questions, create a finish screen to thank the user and end the flow:

- Drag and drop a "Screen" element onto the canvas.
- Configure the screen by providing a label (e.g., "Survey Complete") and adding a thank-you message.

Step 6: Connect the Screens

Connect the screens in your flow by using the "Next" button on each screen element to specify the logical flow of the survey. Ensure that the user progresses through the questions in the desired order.

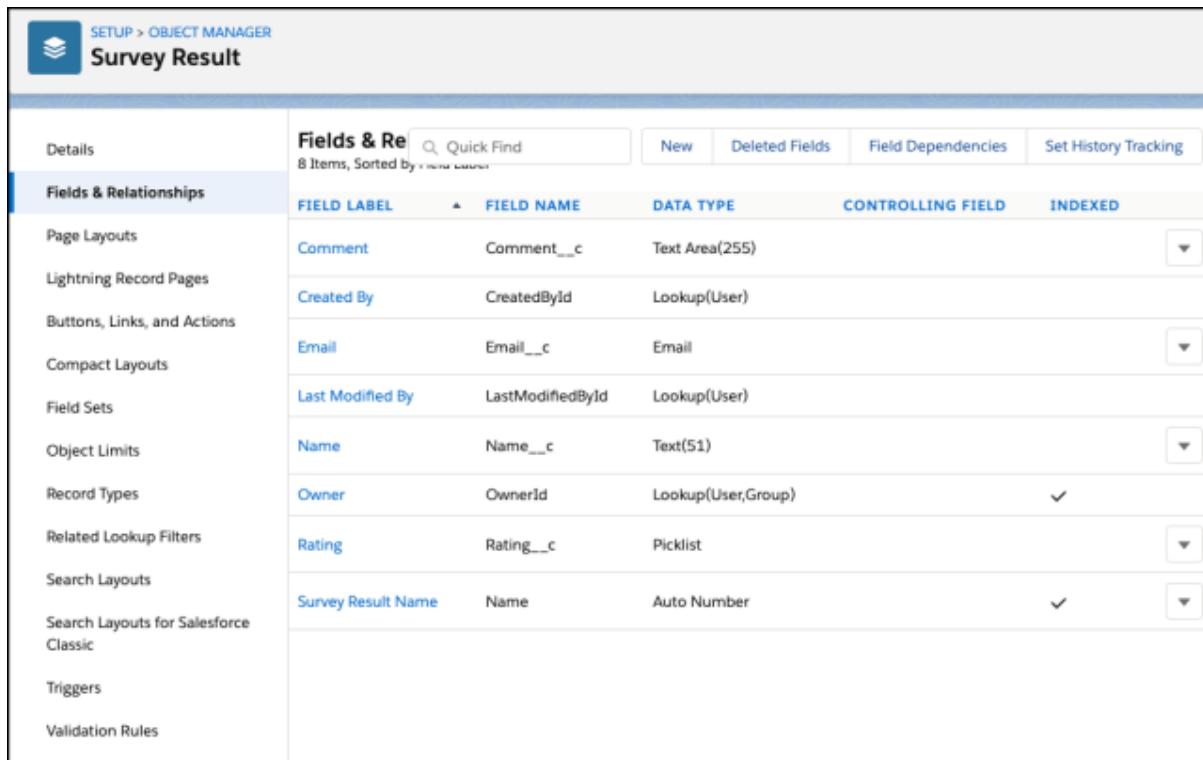
Step 7: Activate the Flow

- Click on the "Activate" button in the top-right corner of the Flow Builder to make your survey flow available for use.

Step 8: Embed the Flow

To make the survey accessible to users, you can embed it on a Lightning Record Page, a Visualforce page, or a Lightning App Builder page, depending on your Salesforce setup and requirements.

Step 1: Create a custom object



The screenshot shows the 'Survey Result' object details page in the Salesforce Setup > Object Manager. The page title is 'Survey Result'. The top navigation bar includes 'SETUP > OBJECT MANAGER' and a 'Survey Result' button. Below the title, there are tabs for 'Details' and 'Fields & Relationships'. The 'Fields & Relationships' tab is selected, showing a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists several fields: Comment (Comment__c, Text Area(255)), Created By (CreatedById, Lookup(User)), Email (Email__c, Email), Last Modified By (LastModifiedById, Lookup(User)), Name (Name__c, Text(51)), Owner (OwnerId, Lookup(User,Group)), Rating (Rating__c, Picklist), and Survey Result Name (Name, Auto Number). The 'INDEXED' column contains checkmarks for Owner and Survey Result Name.

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

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

Email Template
Thank You Email - Survey

Details Related

Information

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

Message Content

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

Additional Information

Created By Rakesh Gupta, 12/21/2020, 4:23 PM	Last Modified By Rakesh Gupta, 12/21/2020, 4:32 PM
---	---

Step 3: Create an Email Alert

[Edit Email Alert](#)[Help for this Page](#) 

Survey - Thank You Email

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit

[Save](#) [Save & New](#) [Cancel](#)

Edit Email Alert

= Required Information

Description

Survey - Thank You Email

Unique NameSurvey_Thank_You_Email **Object**

Survey Result

Email TemplateThank You Email - Survey **Protected Component****Recipient Type**Search: User  for: [Find](#)**Recipients****Available Recipients**

User: Integration User
User: Rakesh Gupta
User: Security User

Selected Recipients

Email Field: Email

[Add](#)
[Remove](#)

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

Additional EmailsCurrent User's email address  Make this address the default From email address for this object's email alerts. [Save](#) [Save & New](#) [Cancel](#)

Step 4: Salesforce Flow – Create a Screen that Allow

Users to Fill Sur

Edit Create Records

Create Salesforce records using values from the flow.

* Label

Save Response

* API Name

Save_Response

Description

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

Survey Result

Set Field Values for the Survey Result

Field

Comment__c

Value

← A_a Comment X



Field

Email__c

Value

← A_a Email > Value X



Field

Name__c

Value

← (!Name.firstName) (!Name.lastName)



Field

Rating__c

Value

← A_a Rating X



+ Add Field

Manually assign variables

Cancel

Done

Step 5: Salesforce Flow – Call an Action – Email Alert to Send Out Thank You Email

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

Aa * Record ID

{!Save_Response}

Cancel

Done

Save as

[A New Version](#) [A New Flow](#)

* Flow Label

Survey

* Flow API Name

Survey

Description

[Hide Advanced](#)

How to Run the Flow [?](#)

User or System Context—Depends on How Flow is Launched

* Type

Screen Flow

* API Version for Running the Flow

51

Interview Label [?](#)

Insert a resource...



Survey {!\$Flow.CurrentDateTime}

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

2

[Cancel](#)

[Save](#)

Step 6: Create a Lightning Application to Render Lightning

Runtime for Flow in a Visualforce Page

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

Visualforce Page

Survey

Help for this Page ?

Page Edit

Save Quick Save Cancel Where is this used? Component Reference Preview

Page Information

Label Survey

Name Survey

Description

Available for Lightning Experience, Experience Builder sites, and the mobile app

Require CSRF protection on GET requests

Visualforce Markup Version Settings

```
<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:VFPPageToLC", 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

Site Edit**Save****Cancel**Site Label Site Name

Site Description

Site Contact Default Record Owner Default Web Address Active Active Site Home Page [Preview]Inactive Site Home Page [Preview]Site Template Site Robots.txt Site Favorite Icon Analytics Tracking Code URL Rewriter Class Enable Feeds Clickjack Protection Level Require Secure Connections
(HTTPS)Lightning Features for Guest
Users Upgrade all requests to HTTPS Enable Content Sniffing
Protection Enable Browser Cross Site
Scripting Protection Referrer URL Protection Guest Access to the Payments
API

Survey

Name

First Name

Alok

Last Name

Sinfal

* Email

[REDACTED]

* Rating

5 

* Comment

Awesome Blog



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