

Naan Mudhalvan
Salesforce Developer(Course)
Assignment no 1

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Year & Dep : 4th year & CSE
Batch : 2024
Zone no : Zone 8

1.Create a Master-Detail Relationship between two Custom objects and also create a Roll Up

Summary Field to Calculate total number of records.

Solution:

Step 1: Create Custom Objects

Assuming you have two custom objects, let's call them "College_C" and "C Department_C". If you haven't already created these objects, you can do so by going to Setup > Object Manager > Create > Custom Object.

The screenshot shows the 'New Custom Object' page in Salesforce Setup. The page is titled 'New Custom Object' and has a breadcrumb trail: Setup > Object Manager > Create > Custom Object. The page is divided into several sections:

- Custom Object Definition Edit:** This section contains fields for 'Label' (College_C), 'Plural Label' (Colleges), 'Name (API Name)' (College_C), and 'Name (API Name)' (C Department_C). There is also a 'Description' field.
- Enter Record Name Label and Format:** This section contains fields for 'Record Name' (College Name) and 'Record Type' (Test).
- Optional Features:** This section contains checkboxes for 'Allow Field History', 'Allow Bulk API', 'Allow Field History', 'Allow Field History', and 'Allow Field History'.
- Object Classification:** This section contains checkboxes for 'Allow Field History', 'Allow Bulk API', 'Allow Field History', 'Allow Field History', and 'Allow Field History'.
- Deployment Status:** This section contains a radio button for 'In Development' and a radio button for 'Deployed'.
- Check Status:** This section contains a checkbox for 'Allow Field History'.
- Object Creation Options (Available only when custom object is first created):** This section contains checkboxes for 'Allow Field History' and 'Allow Bulk API'.

The page has a 'Save' button at the bottom right.

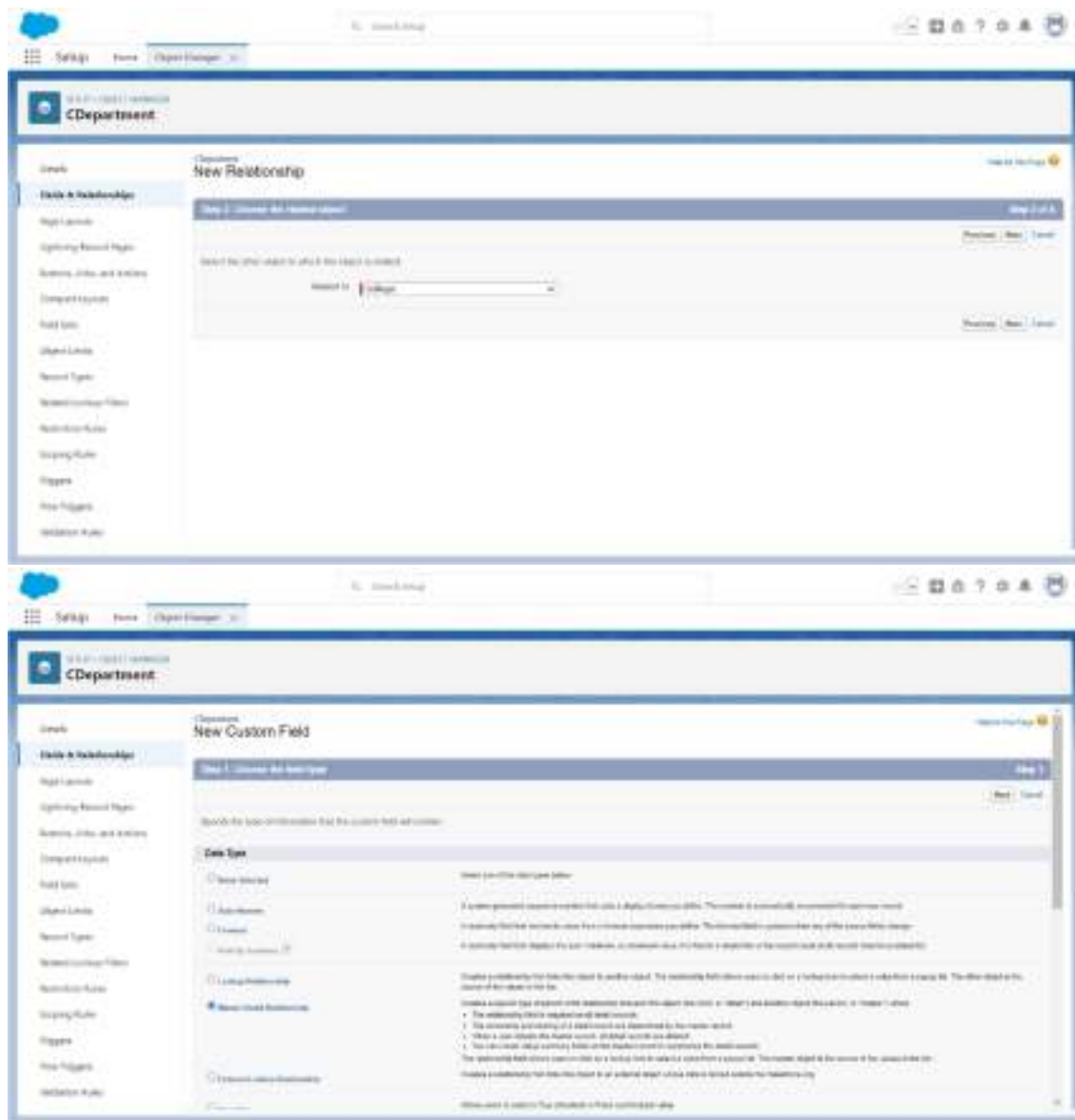
Second custom objects, let's call them
"Department_C"

Step 2: Create a Master-Detail Relationship

To create a Master-Detail relationship between these two custom objects, follow these steps:

1. Go to Setup > Object Manager.
2. Click on "College__c" to open its settings.

3. In the left sidebar, click on "Fields & Relationships."
4. Click the "New" button to create a new custom field.
5. Choose "Master-Detail Relationship" as the data type.
6. Enter a label for the relationship, e.g., "Department __c."
7. Choose " Department__c" as the related object.
8. Configure other settings as needed and click "Next."
9. Specify the field-level security and add it to relevant page layouts.
10. Click "Next" and "Save" to create the relationship.

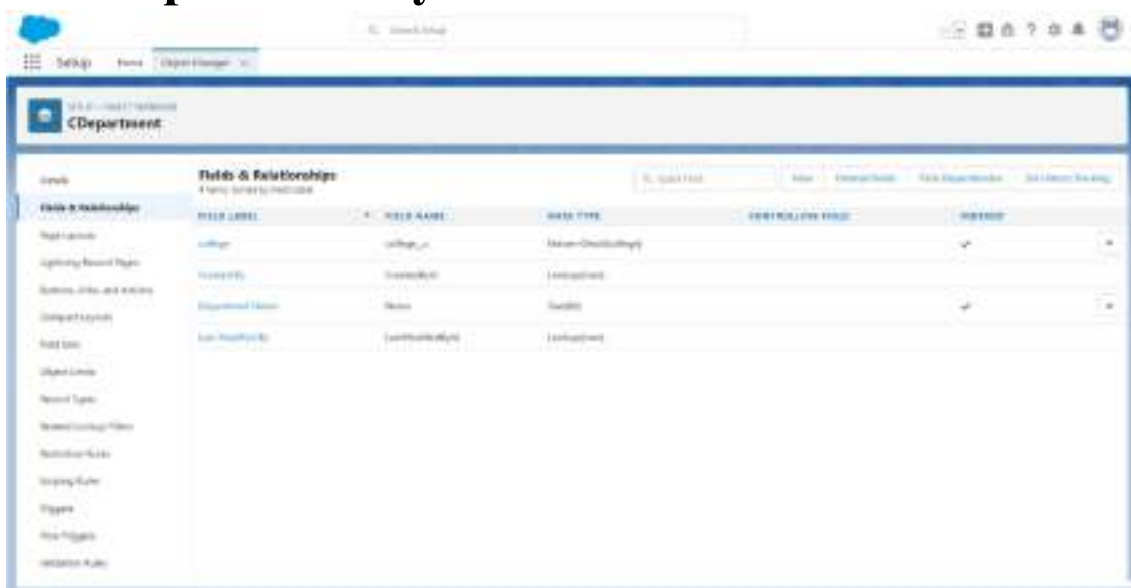


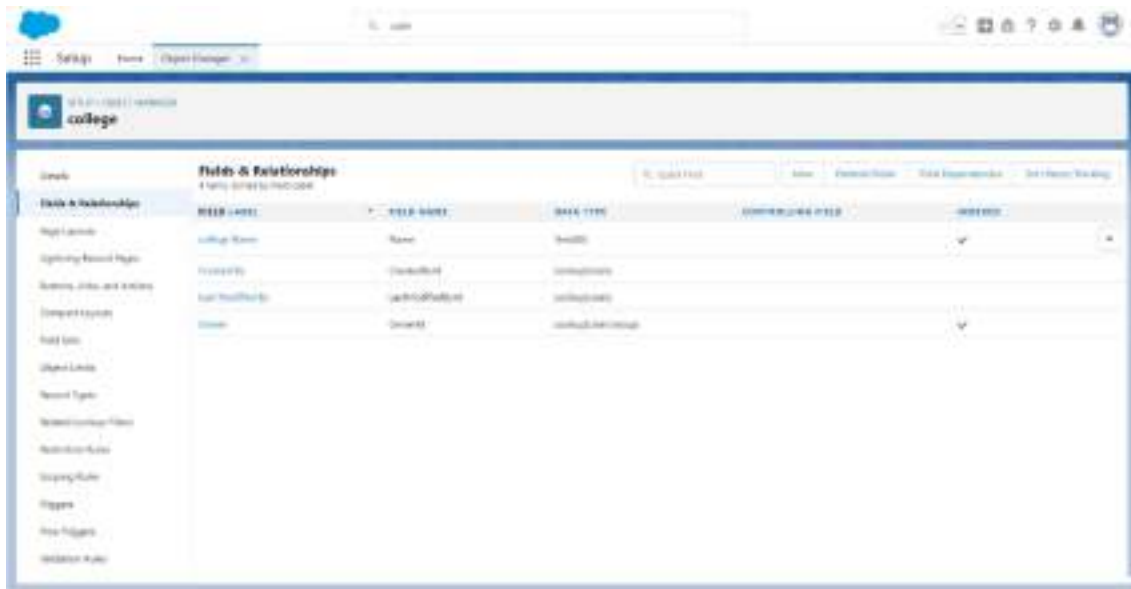
Step 3: Create the Roll-Up Summary Field

Now, let's create a Roll-Up Summary Field on the "College_C" to calculate the total number of related records in "Department__C":

1. Still on the "College__c" settings, go to "Fields & Relationships."

2. Click the "New" button to create a new custom field.
3. Choose "Roll-Up Summary" as the data type.
4. Enter a label for the field, e.g.,
5. Choose "Count" as the Roll-Up Type.
6. Select " Department__c" as the object to roll up information from.
7. Specify the filter criteria if you want to filter the related records.
8. Configure other settings as needed and click "Next."
9. Specify the field-level security and add it to relevant page layouts.
10. Click "Next" and "Save" to create the Roll-Up Summary Field.



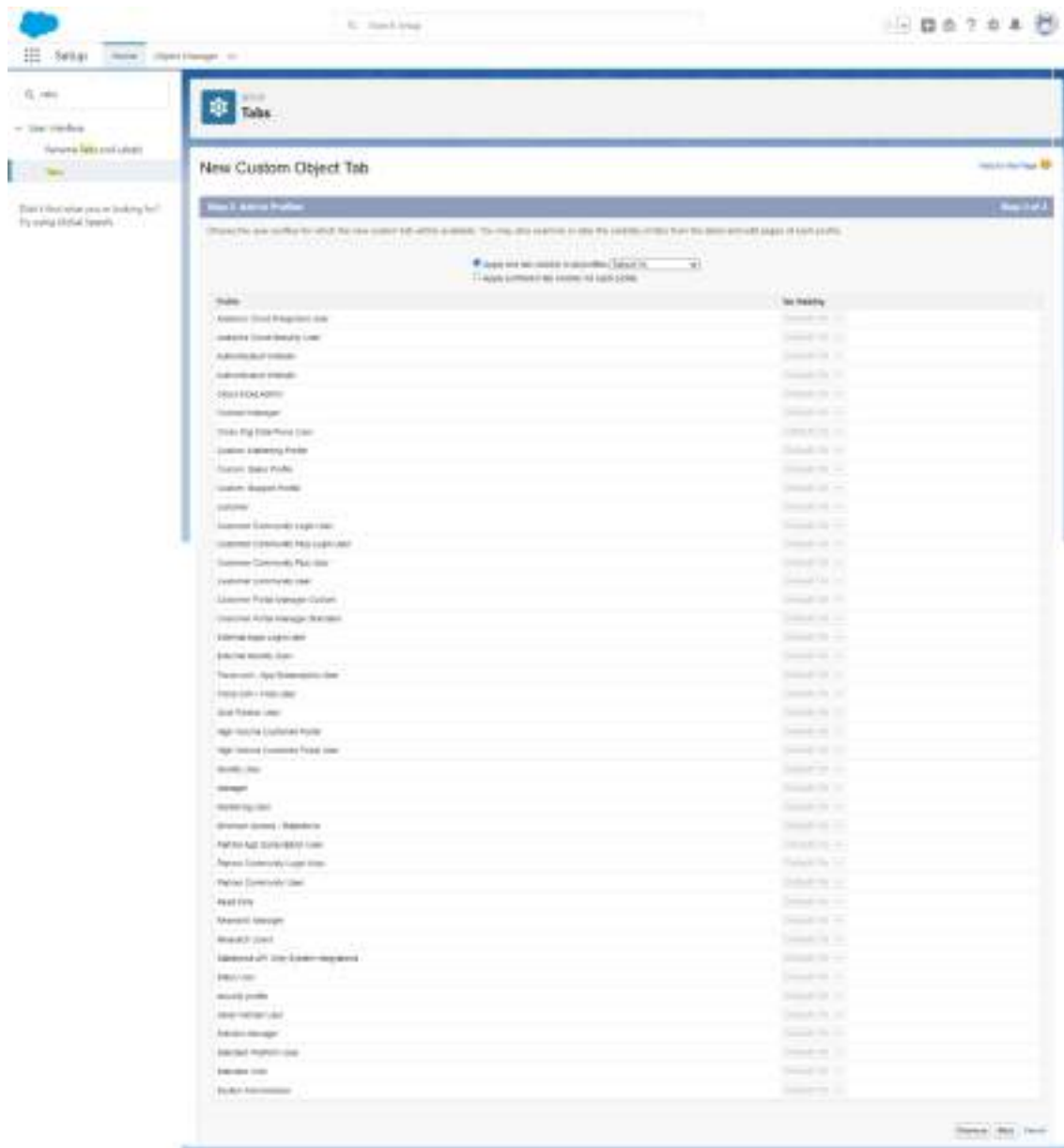


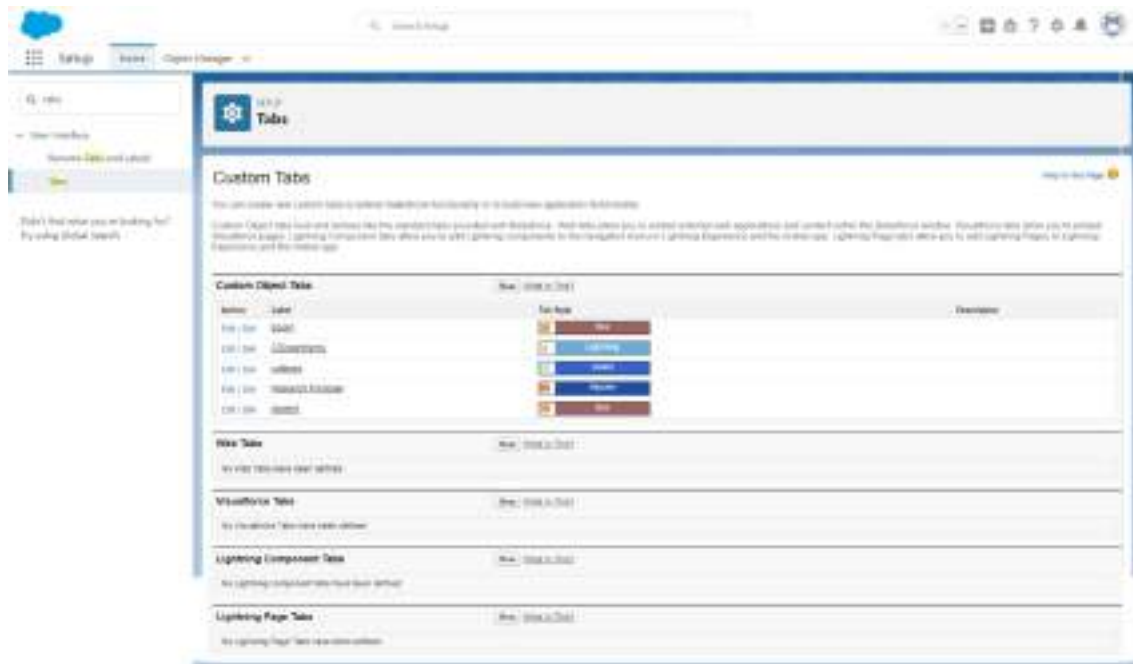
Step 4: Create a Lightning App

1. Type and select "App Manager."
2. Click "New Lightning App."
3. Fill in basic information (Name, Developer Name, Description).
4. Choose the App Type (Standard, Console, Custom).
5. Customize the Logo and Colour Scheme.
6. Configure Navigation Items (objects to appear in the app's menu).
7. Set the App Visibility (default access).
8. Optionally, choose Record Pages (Lightning Record Pages).
9. Review and Save the app.

10. Assign the app to users or profiles.

11. Test the app with the assigned users.

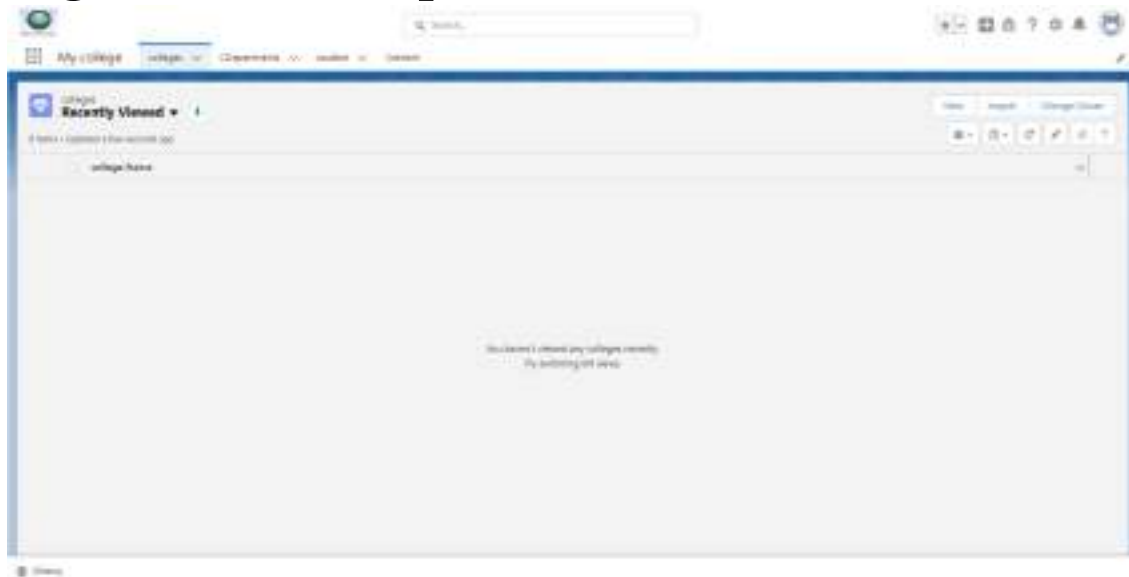




Conclusion:

Now, whenever you create or update a record in the "Department__c" related to a "College__c," the "TotalCount__c" field on the "College__c" will automatically update to show the total number of related records.

Remember to adjust field-level security, validation rules, and page layouts as needed to ensure that your custom objects and fields are appropriately configured for your organization's requirements.



My college

New college

Information

College Name

State

Postcode

City

Location

Latitude

Longitude

Owner

Cancel Save & Add Add

My college

Departments

Recently Viewed

Department Name

1

The screenshot shows the 'New Department' form in the PeopleSoft HR system. The form is titled 'New Department' and is part of the 'Department Maintenance' section. It contains several dropdown menus for selecting department details: Department Code (set to 'Information Technology'), Division (set to 'A'), Organization (set to 'Information'), Group (set to 'SYSTEMS'), and Job Type (set to 'P-O'). There is also a text field for 'Name'. At the bottom, there are 'Cancel', 'Save & Exit', and 'Save' buttons. A red box highlights the 'Save' button with the text 'To save the record for you'.

My college [College](#) [Courses](#) [Search](#) [Logout](#) [Home](#)

Information technology [View Content](#) [PDF](#) [New Opportunity](#)

Selected Details

Supporter Name	Information Technology	
Address		
City		
State		
Zip Code		
Phone		
Mobile		
Email		
Created By	System	
Created On	11/16/2023 10:18 am	
Last Modified By	System	
Last Modified On	11/16/2023 10:18 am	

My college [College](#) [Courses](#) [Search](#) [Logout](#) [Home](#)

Web [View Content](#) [PDF](#) [New Opportunity](#)

Selected Details

Supporter Name	Web	
Address		
City		
State		
Zip Code		
Phone		
Mobile		
Email		
Created By	System	
Created On	11/16/2023 10:18 am	
Last Modified By	System	
Last Modified On	11/16/2023 10:18 am	

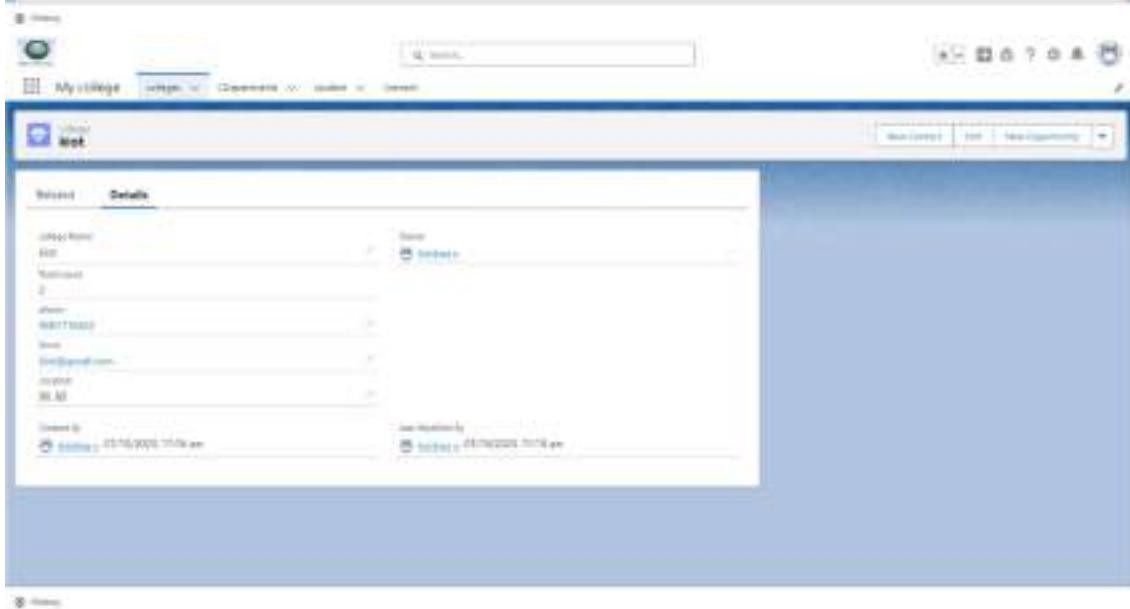
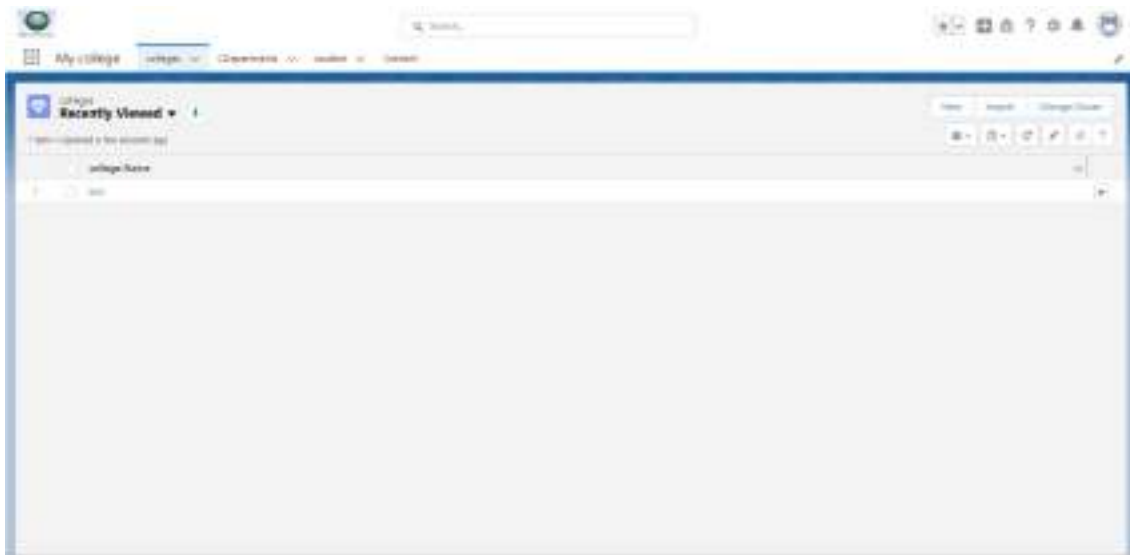
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1 item is displayed in the document list

Document Name

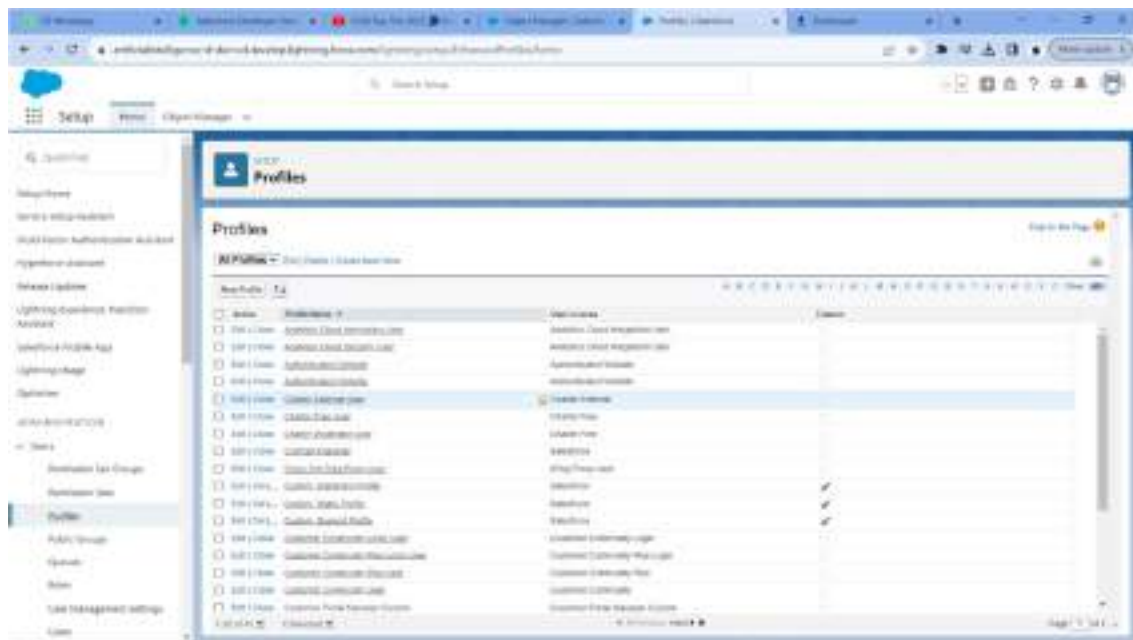
1

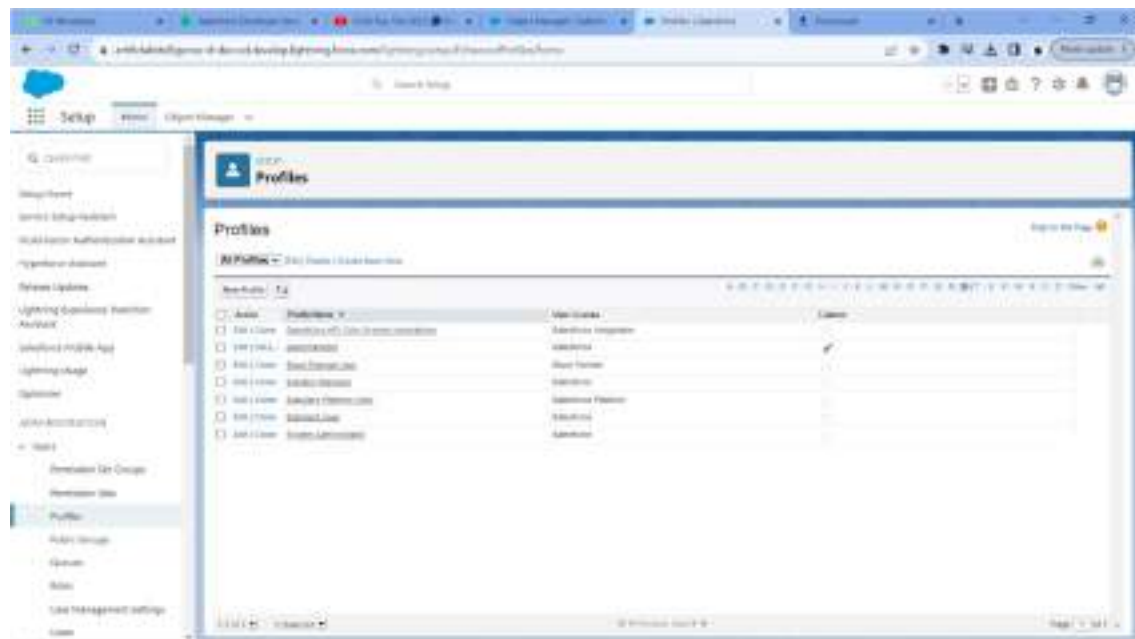


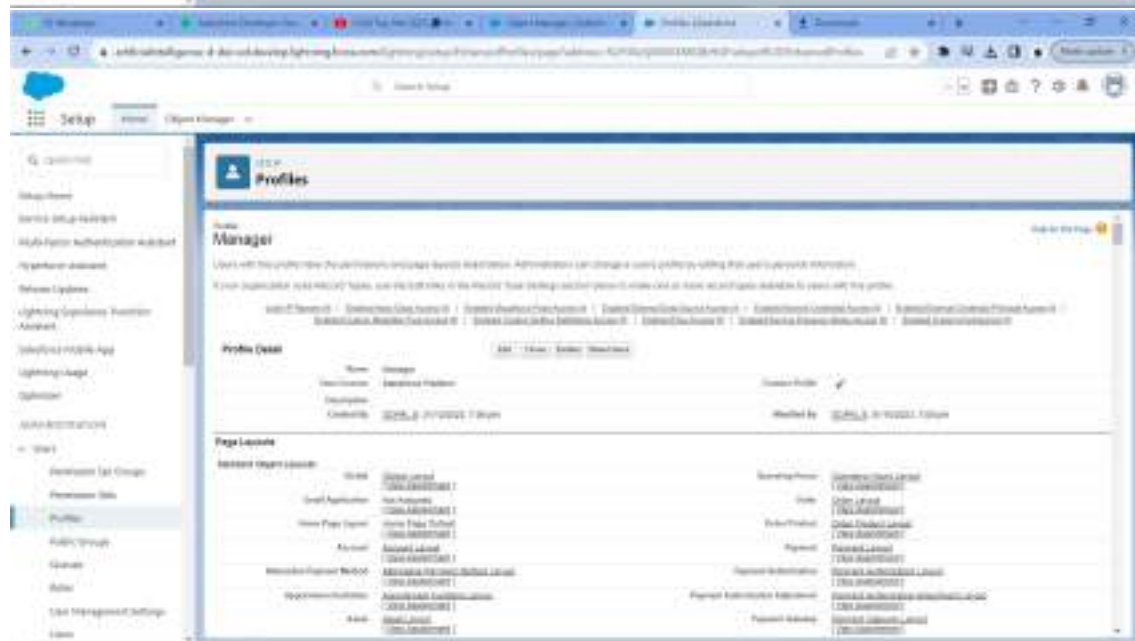
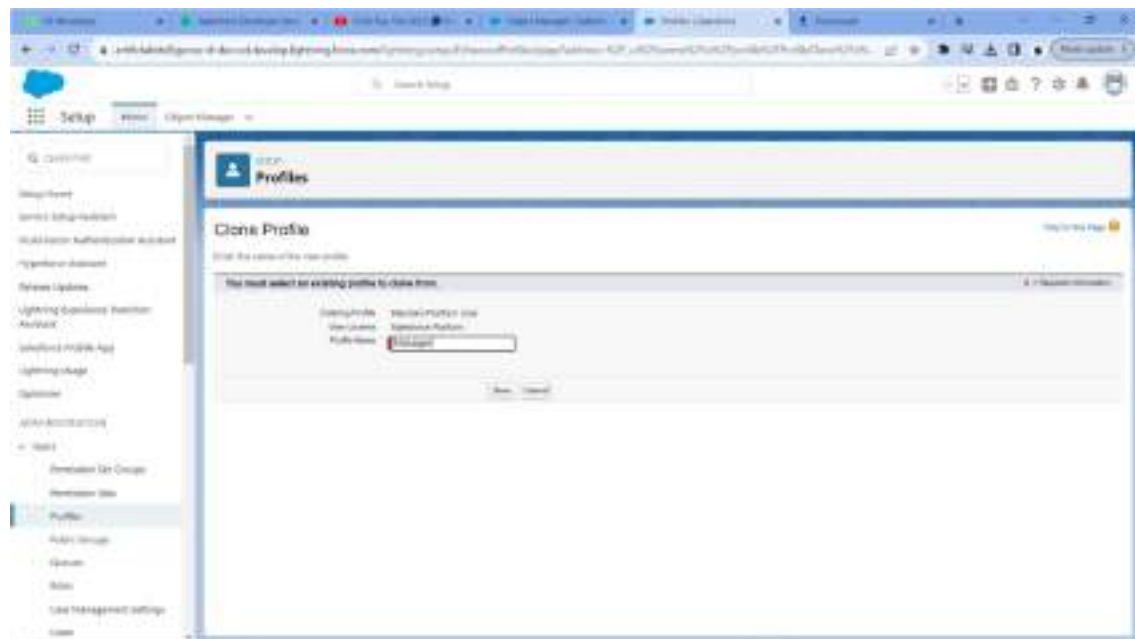
2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

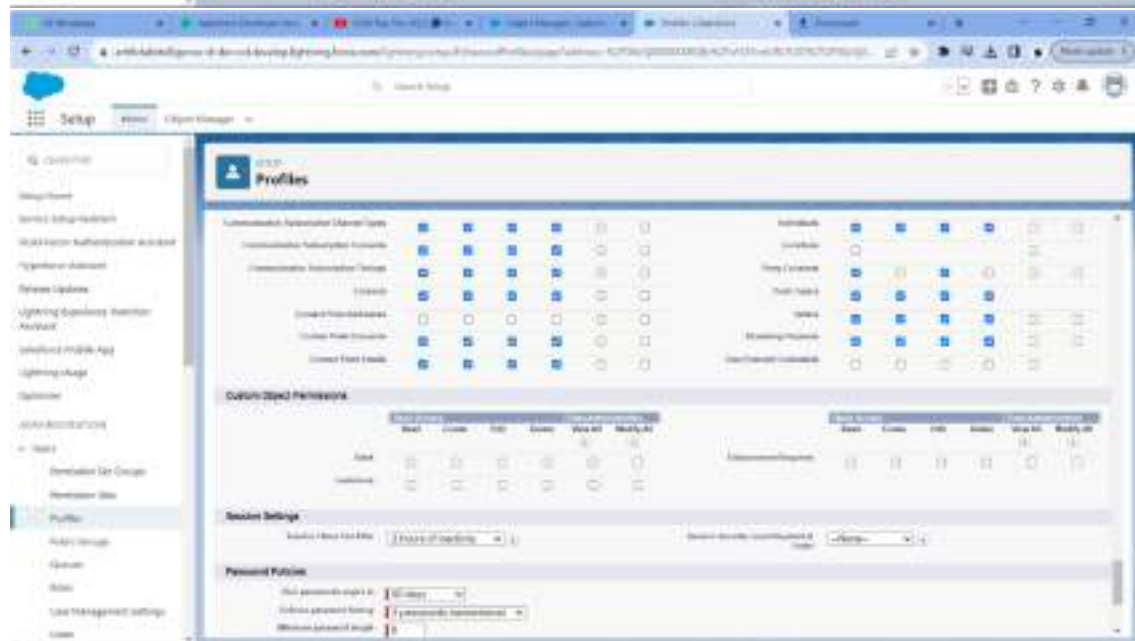
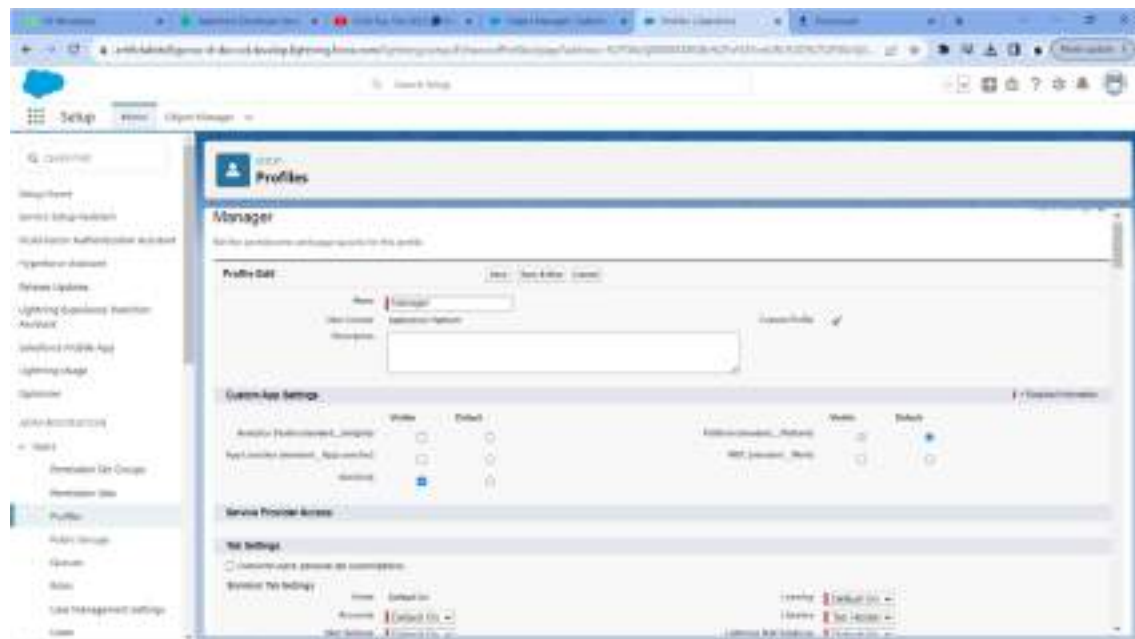
Solution:

Step 1: Create two separate custom profiles, one for User A and one for User B.









salesforce

Change Your Password

Enter a new password for **0011@salesforce.com**. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password:

Confirm New Password:

Security Question:

What's your favorite color?

Answer:

[Change Password](#)

Maximum password length is 32 characters. © 2022 Salesforce. All rights reserved.

salesforce

Sign in to your account

Username:

Password:

[Log In](#)


☐ Remember me

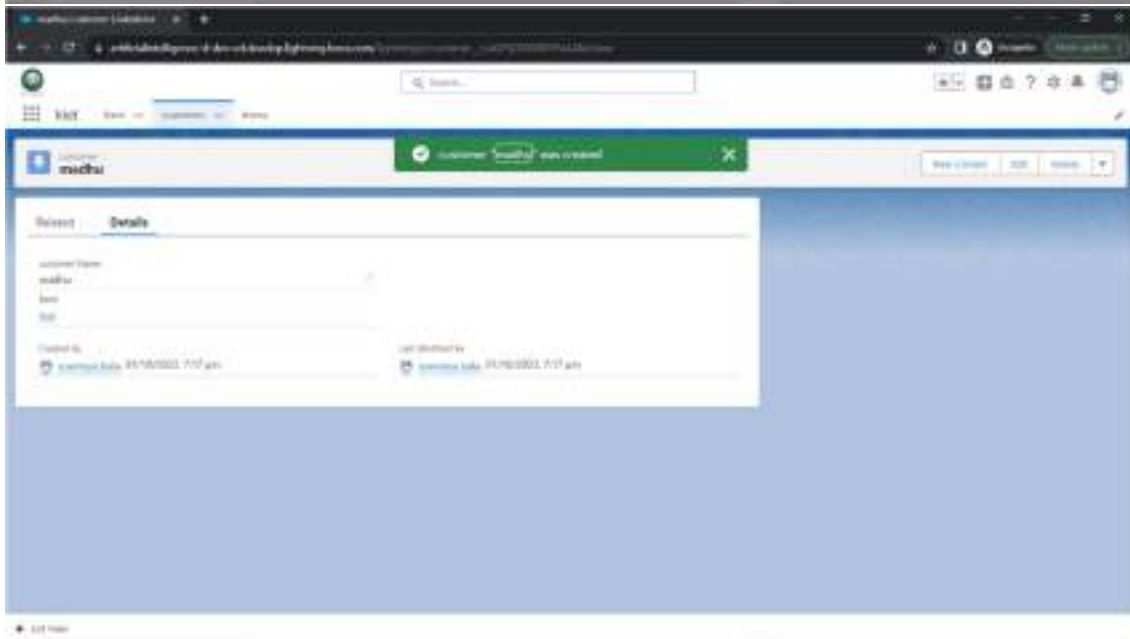
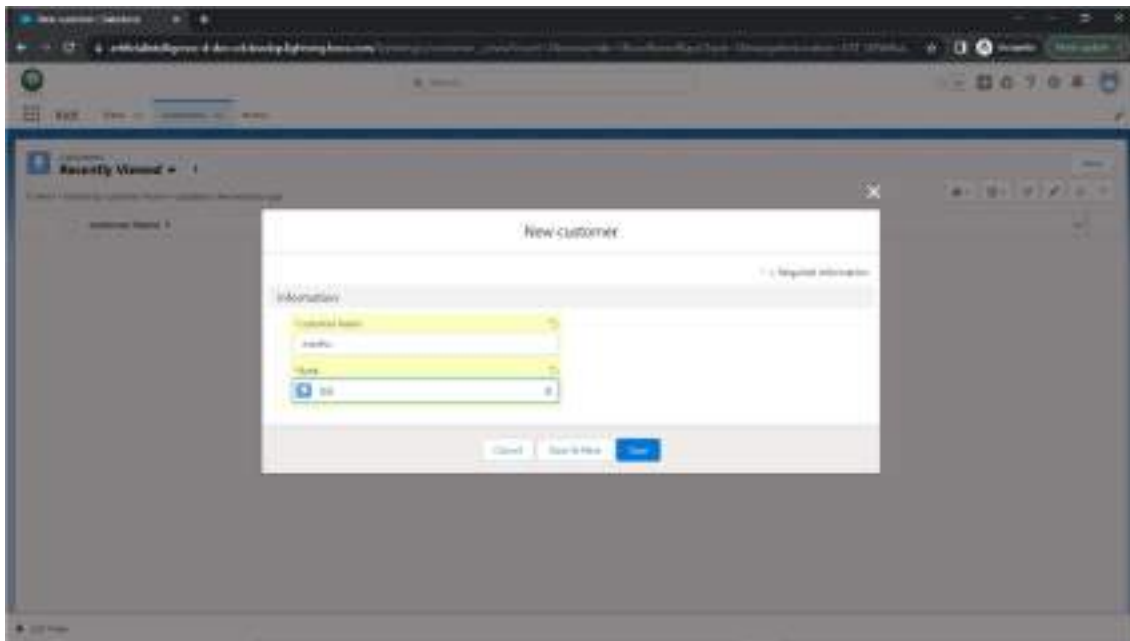
[Forgot Your Password?](#)

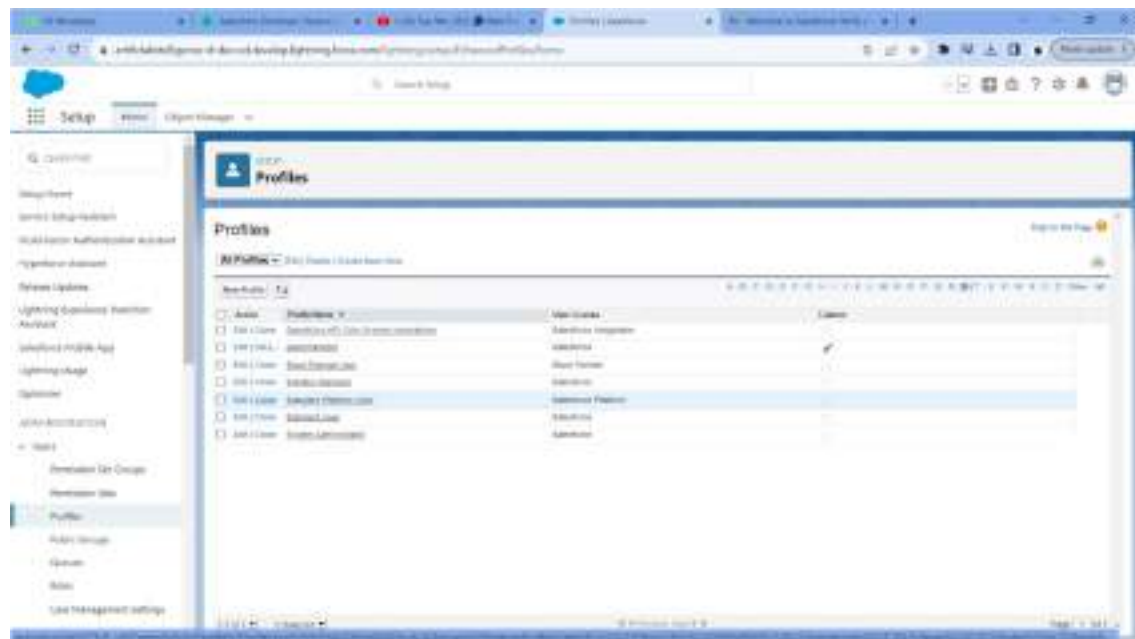
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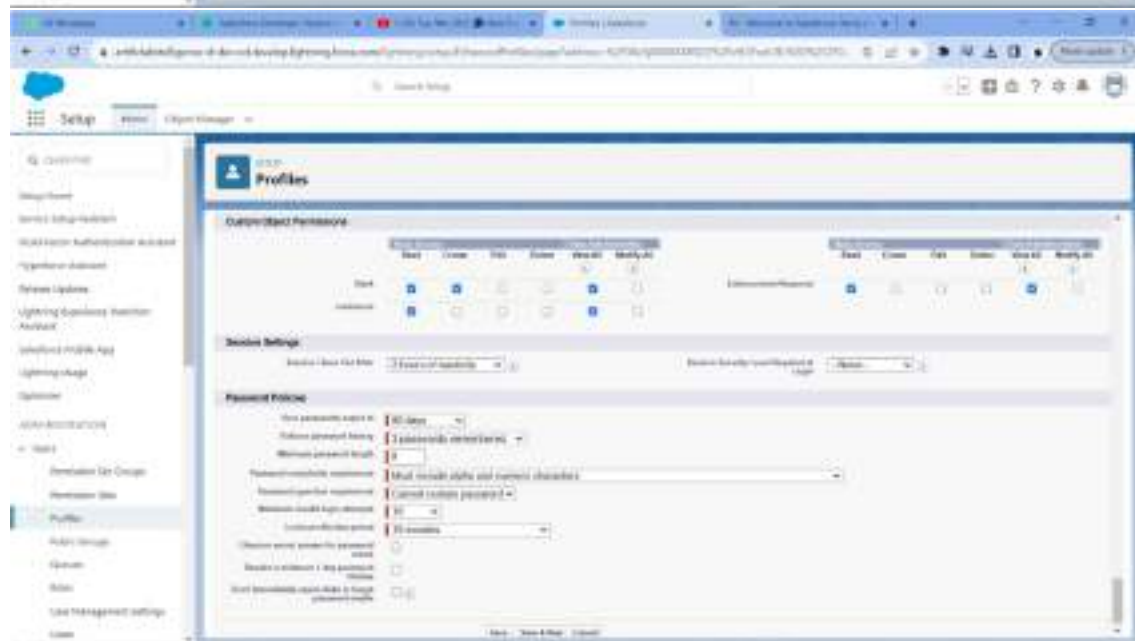
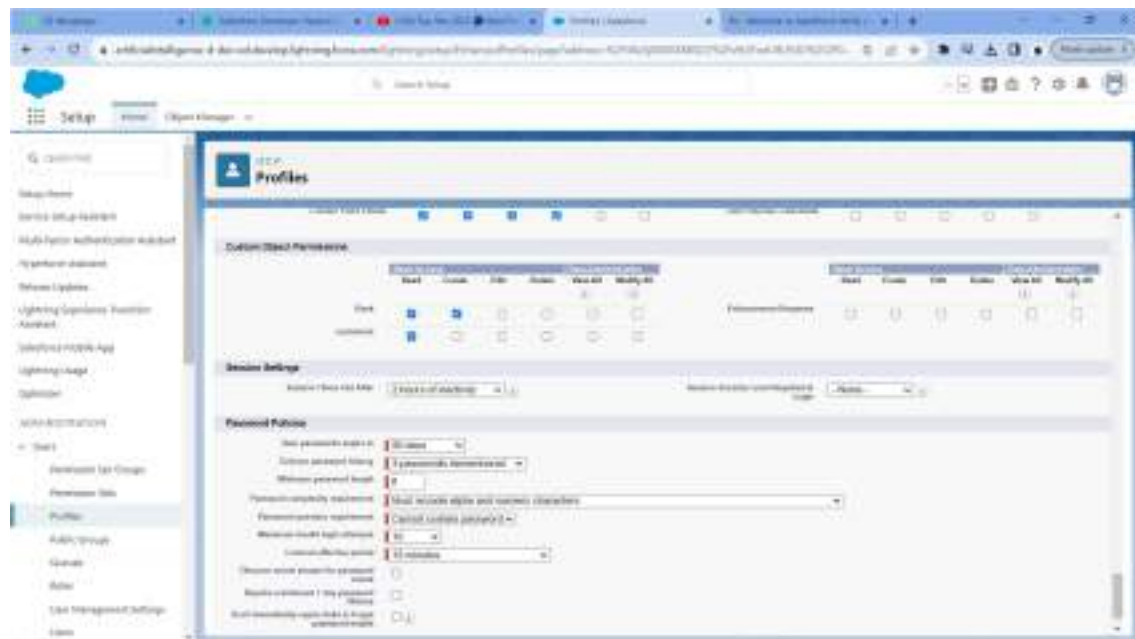
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 **AI Day**







The screenshot shows the AWS IAM console's 'New User' page. The 'General information' tab is selected, displaying the following details:

- Name:** New User
- Access type:** Programmatic access
- Permissions boundaries:** None
- Permissions:** A list of policies is shown, with 'AmazonS3ReadOnlyAccess' selected.

Setup

Users

User: madhu b

User Detail

Field	Value	Field	Value
Name	madhu b	Job	Software Engineer
First Name	madhu	Mobile Phone	9890000000
Last Name	b	Home Phone	
Username	madhu@madhu.com	Work Email	
Email	madhu@madhu.com	Work Phone	
Company	Madhu Enterprises	Knowledge Base	
Department	Engineering	First Step	
Manager	John Doe	Second Step	
Address	123 Main Street, New York, NY 10001	Third Step	
City	New York	Fourth Step	
State	NY	Fifth Step	
Country	USA	Sixth Step	
Postal Code	10001	Seventh Step	
Time Zone	Eastern Standard Time	Eighth Step	
Language	English (US)	Ninth Step	
Locale	en_US	Tenth Step	
Avatar		Eleventh Step	
Profile	Software Engineer	Twelfth Step	
Role	Software Engineer	Thirteenth Step	
Permissions	Standard User	Fourteenth Step	
Groups	Standard User	Fifteenth Step	
App Licenses	Standard User	Sixteenth Step	
App Licenses	Standard User	Seventeenth Step	
App Licenses	Standard User	Eighteenth Step	
App Licenses	Standard User	Nineteenth Step	
App Licenses	Standard User	Twentieth Step	

Gmail

Welcome to Salesforce!

Click below to verify your account.

[Verify Account](#)

To verify log in later, visit the URL:

[https://login.salesforce.com/verify?code=...](#)

Learn more:

[https://help.salesforce.com/...](#)

Again, welcome to Salesforce!

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[Reply](#) [Forward](#)

Change Your Password

Enter a new password for **00000@salesforce.com** (must be 8-30 characters long)

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

New Password

Confirm New Password

Security Question

Answer

Change Password

Recently Viewed

0 items • Click on a recently viewed item

Empty state

No items viewed recently. Click on a recently viewed item.

Step 2:

Permission Sets:

- Create two permission sets, one for User A and one for User B.

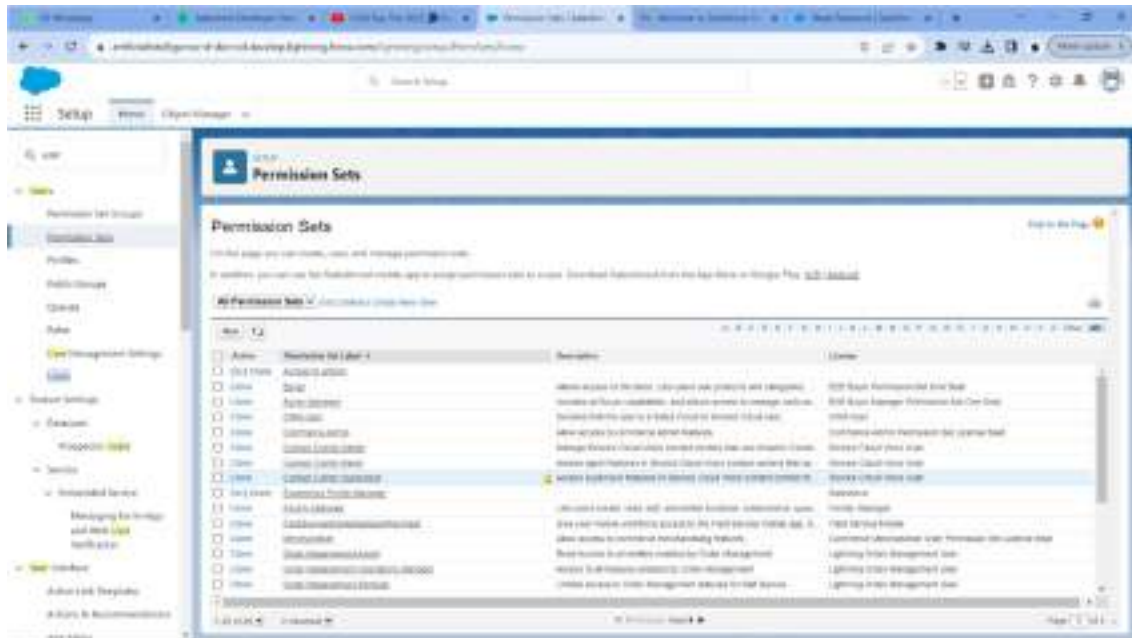
Object-Level Security:

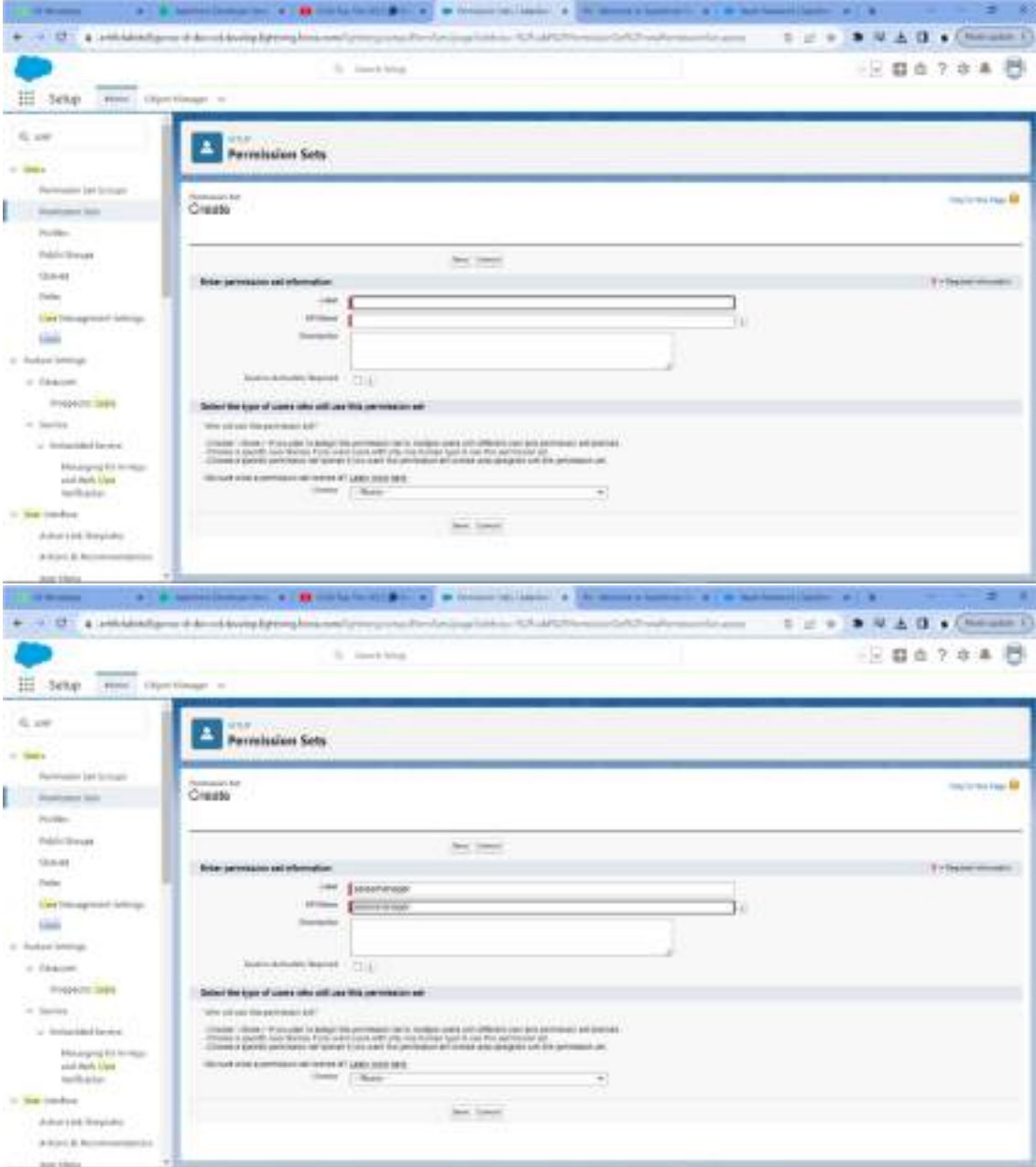
- In each profile and permission set, set the object-level security for the Account object to "Read" to ensure that both I-Jser A and I-Jser B can view Account records.

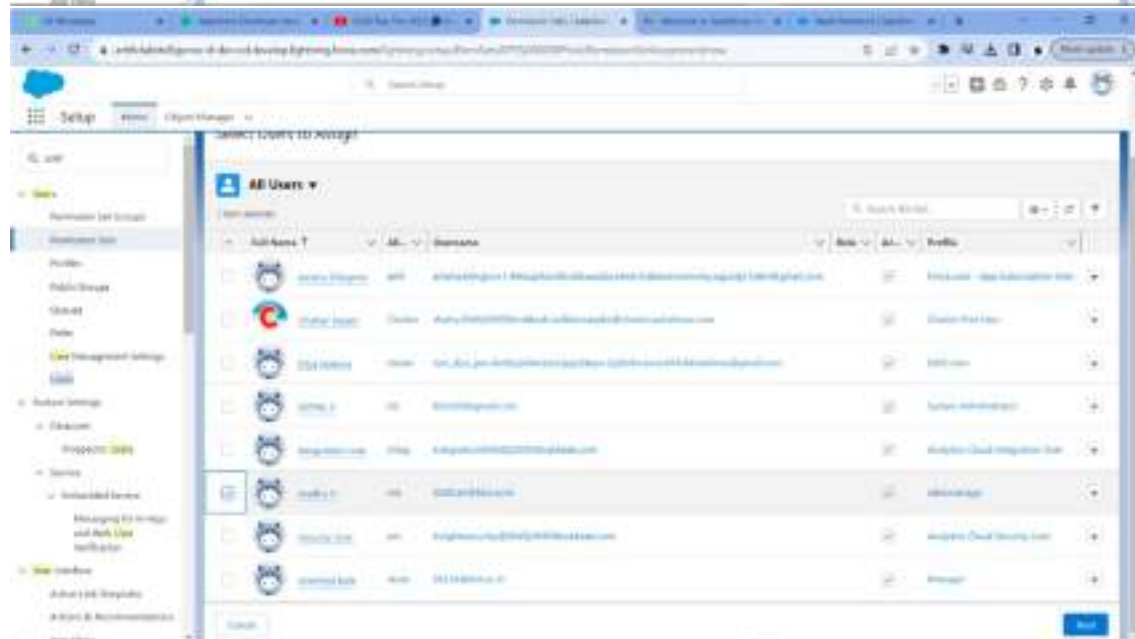
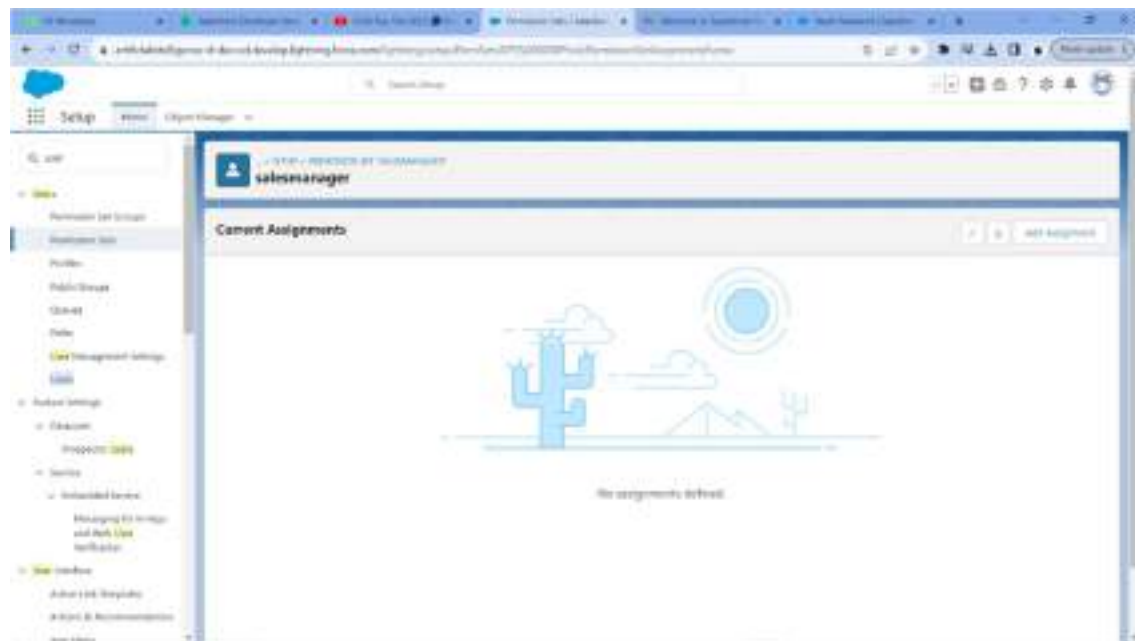
Record-Level Security:

- Implement record-level security using Criteria-Based Sharing Rules.
- Create a sharing rule that shares Account records owned by User A with User A and records owned by IJser B with user B.
- For the sharing rule criteria, specify that records owned by User A are shared with user A, and records owned by User B are shared with User B.

Ownership:







Microsoft Edge browser window showing the "Select an exposure option for assigned users" screen in the Microsoft 365 Admin Center.

Left Navigation Panel:

- Setup
- Users
- Groups
- Permissions for Groups
- Permissions for Users
- Profiles
- Public Groups
- Groups
- Roles
- App Management Settings
- Device Settings
- Devices
- Integrations
- Services
- Unconnected Devices
- Managing for Windows and Mac
- Mobile
- Security
- Compliance
- Intelligence
- Support
- Help

Main Content Area:

Select an exposure option for assigned users

Exposure Option:

Specify the exposure option

☐ No exposure
☐ Limited exposure
☐ Full exposure

Selected Users:

Full Name	Role	Profile	Active	User Name	Expires On
Michael S.	salesmanager		off	salesmanager@company.com	Never Expires

Buttons: Cancel, Back, Save

Microsoft Edge browser window showing the "Assignment Summary" screen in the Microsoft 365 Admin Center.

Left Navigation Panel:

- Setup
- Users
- Groups
- Permissions for Groups
- Permissions for Users
- Profiles
- Public Groups
- Groups
- Roles
- App Management Settings
- Device Settings
- Devices
- Integrations
- Services
- Unconnected Devices
- Managing for Windows and Mac
- Mobile
- Security
- Compliance
- Intelligence
- Support
- Help

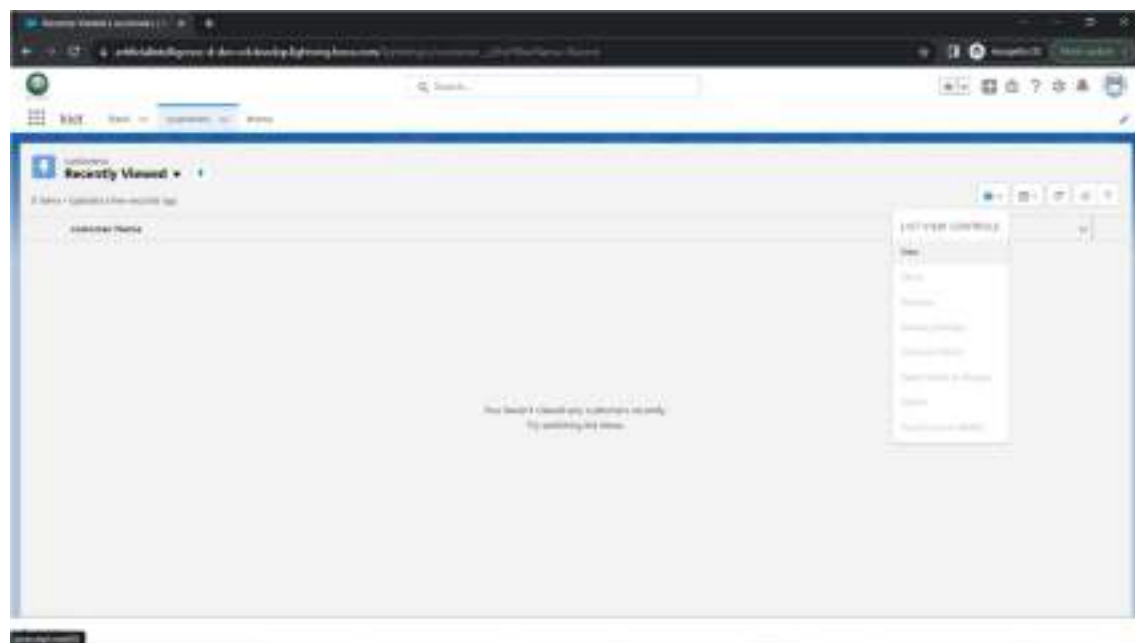
Main Content Area:

Assignment Summary

Assignment Details:

Full Name: Michael S.
User Name: salesmanager@company.com
Expires On: Never Expires
Status: ✔ Success

Buttons: Cancel, Back, Save

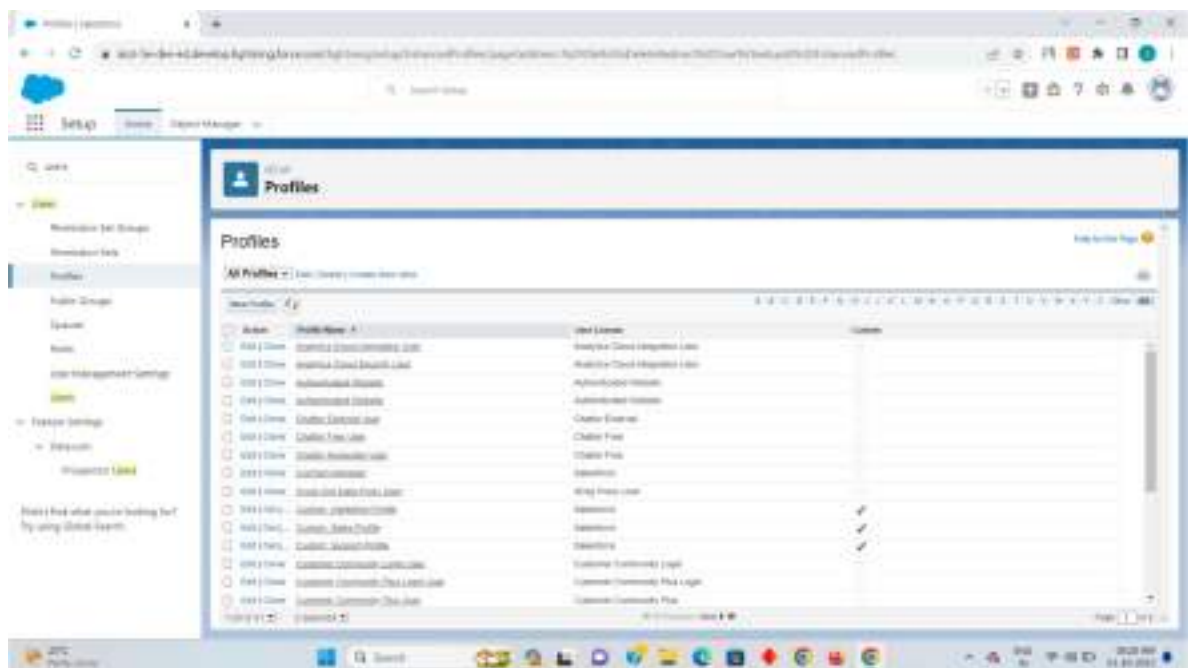


3. . Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

Solution:

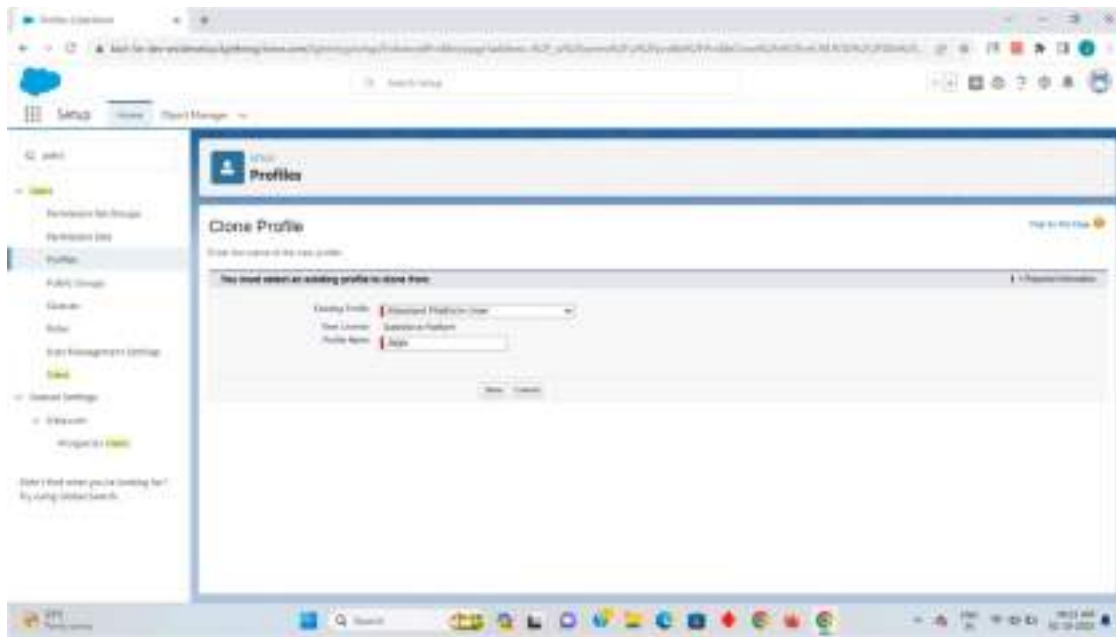
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



Step 2:

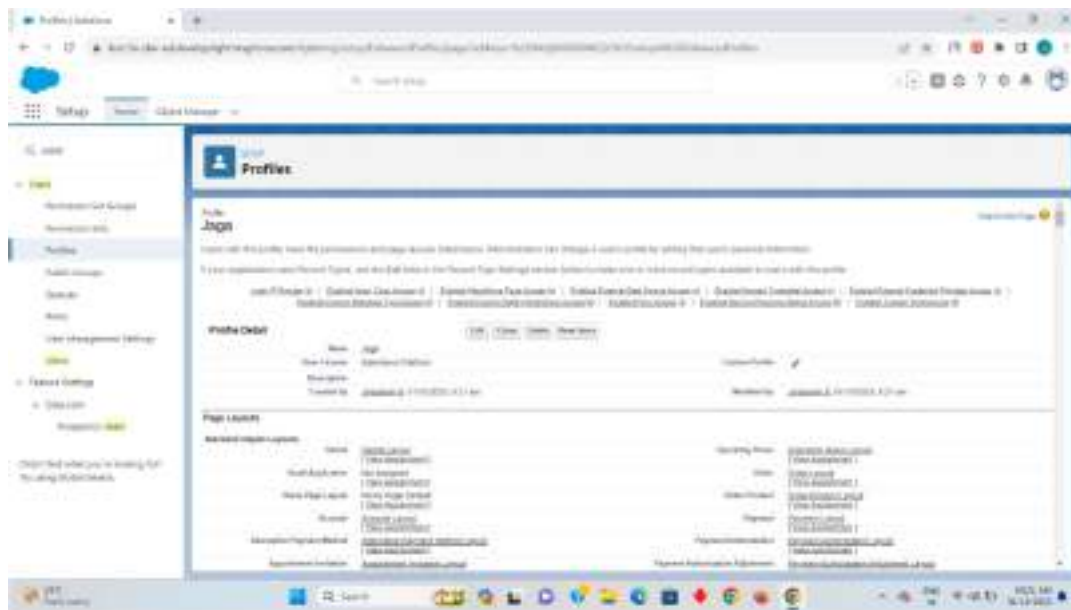
Click on the new to create a new profile along with the label and Api



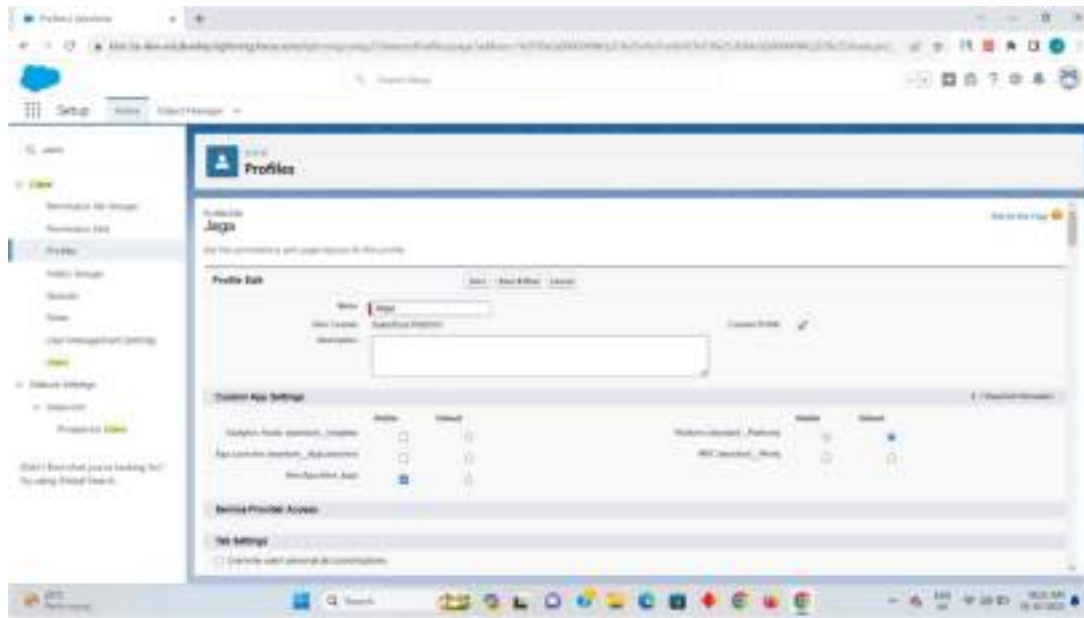
Here I had made it my profile name as Jaga and the existing profile as Standard Platform User.

Step 3:

Now click on the edit and scroll down to custom object settings and enable the read,create,edit and view options. After that click on save.

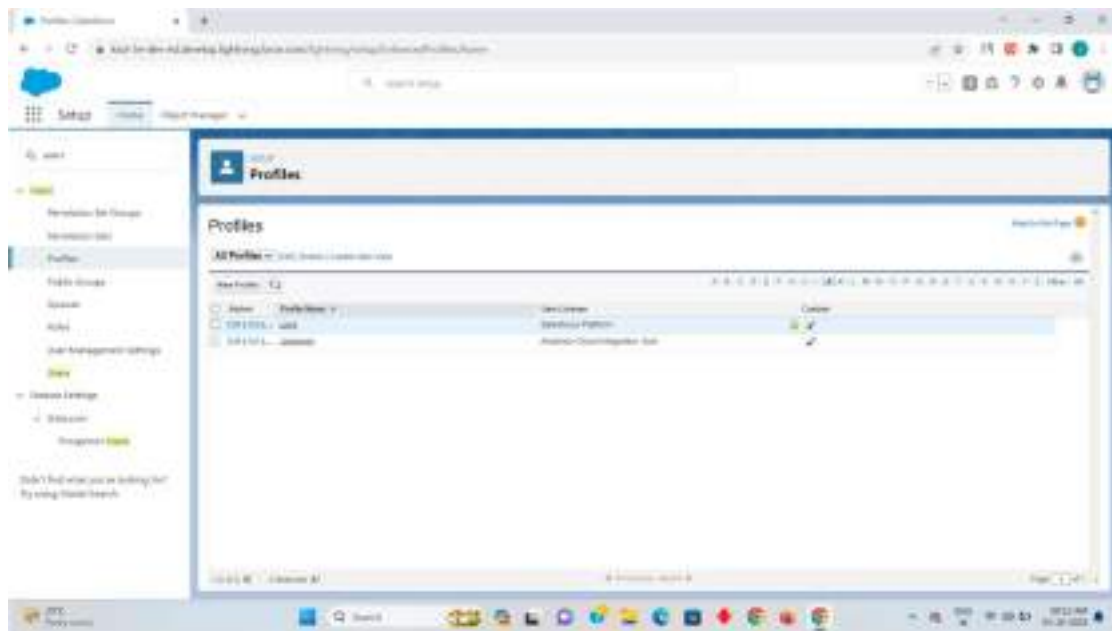






Step 4

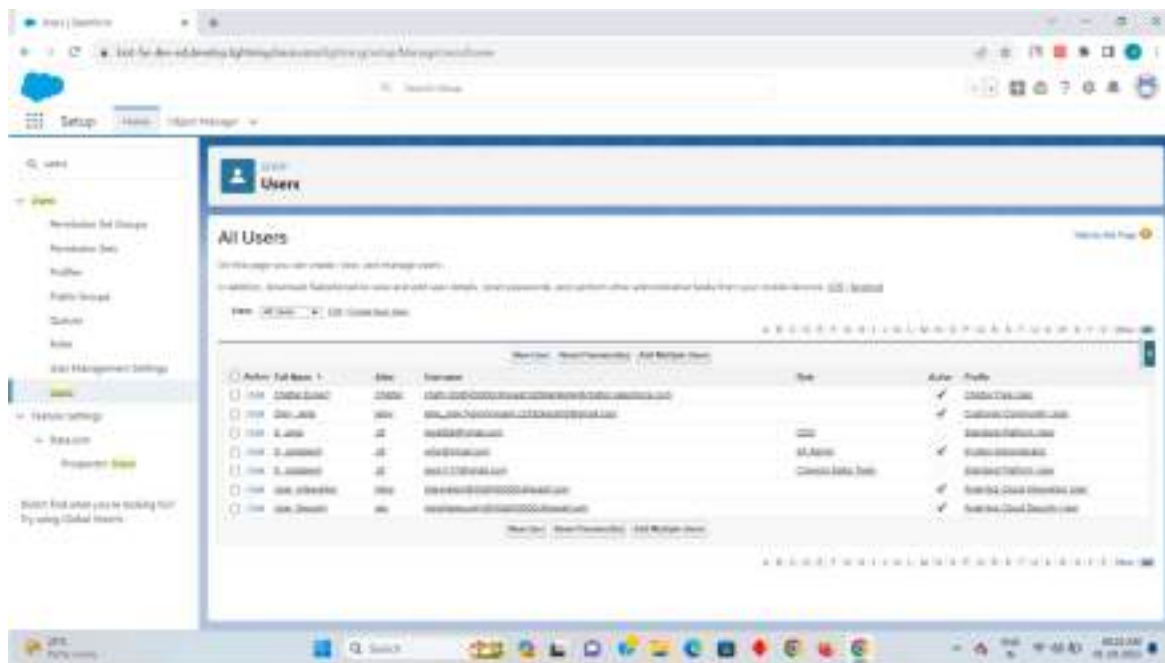
Now you can preview your created profile on the profile option here my profile name jaga has been created with the access of read,create,edit along with view on it

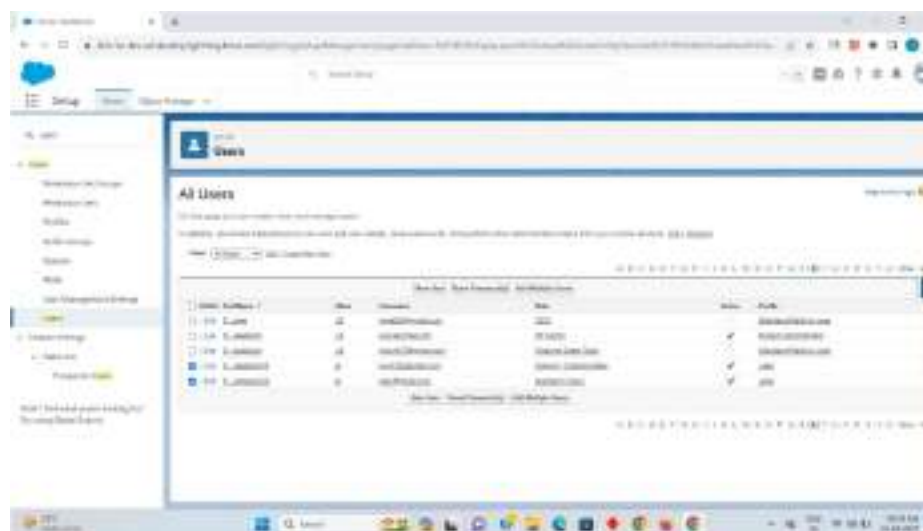
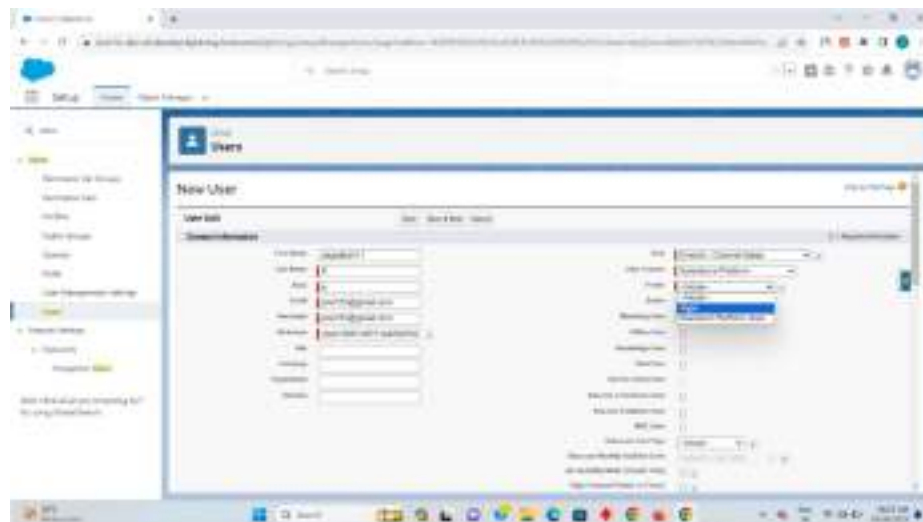


Step 5:

Now create two users by enter into the Setup-quick search[user] and then click on new user after clicking that you need to create two user along

with the profile as Jaga which we have created on the step 2. once the one user has been created click on the save&new so that you can create the second user and there the user name can be created with alternate name but with the same user profile and once the two users are created click on save.



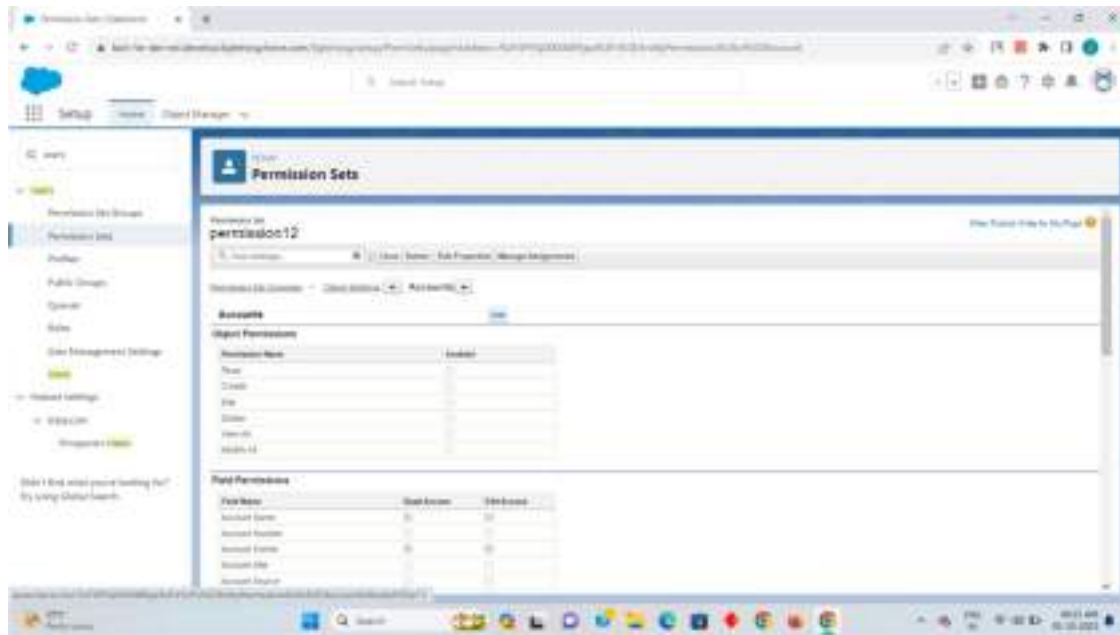


Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

Step 6:

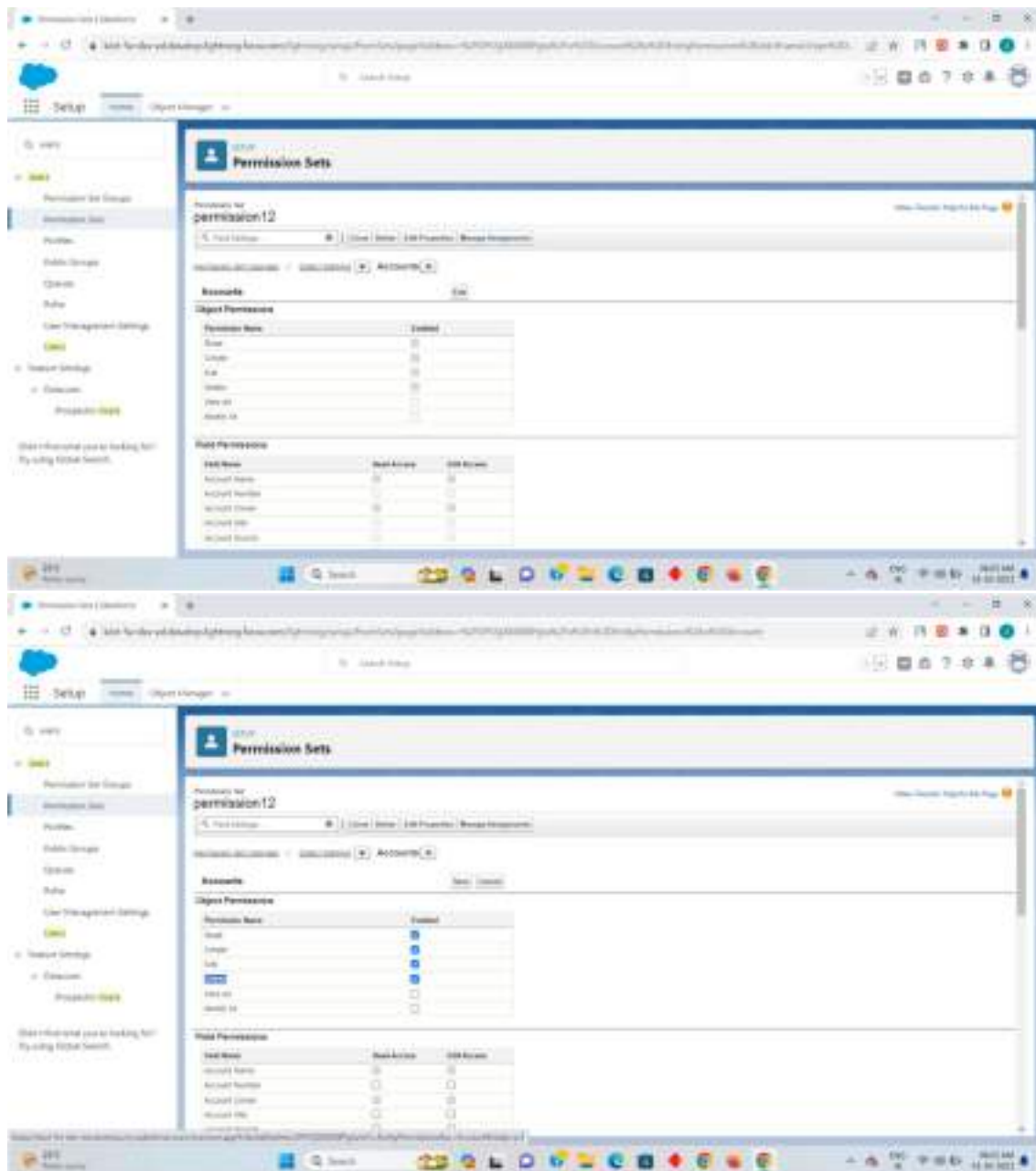
Now the two user as been created with the profile so that two user can perform the Create, Read, Edit and view on both the user. So as per the given task we need to allocate a specific access as delete on one user for that we need create a permission set for one user so it can created as

setup-quick search[permission set]-new-fill label name [auto select the API name]-click on save-object settings-accounts.



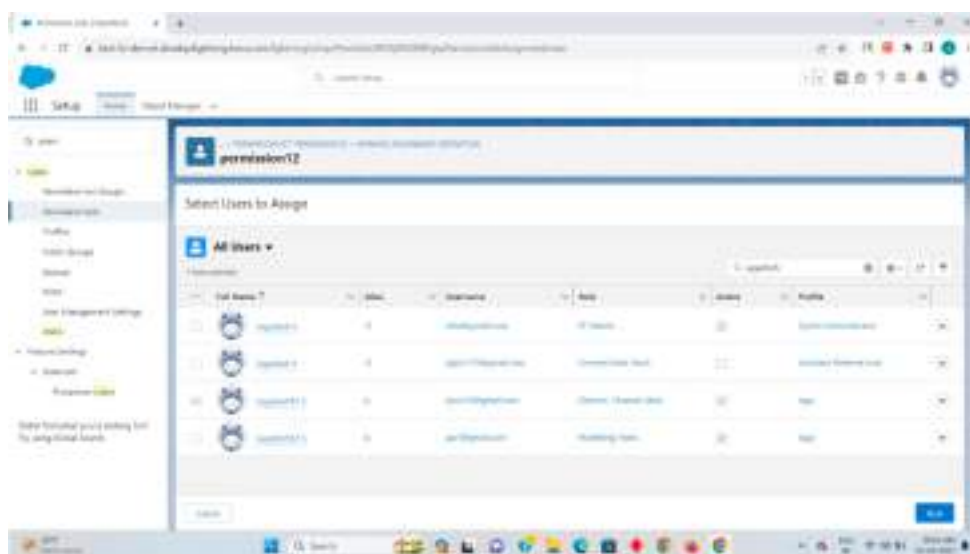
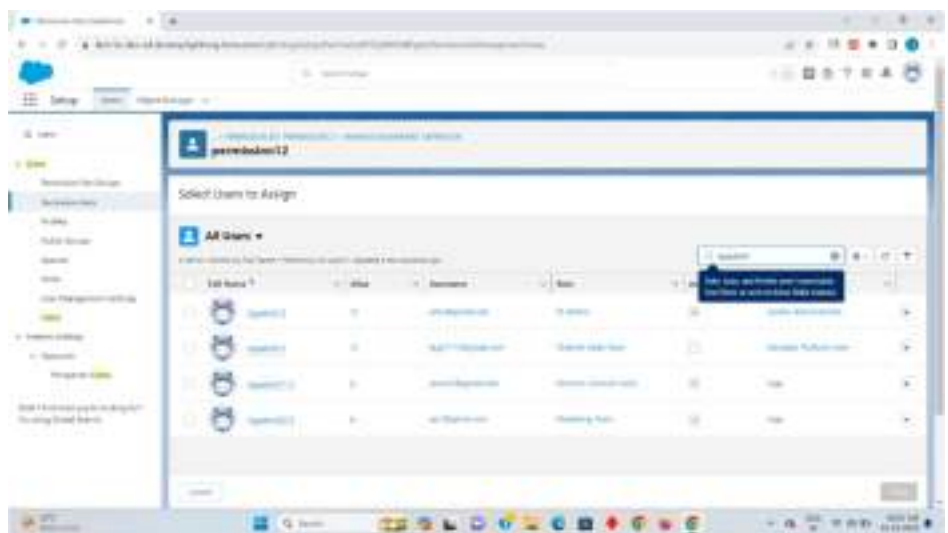
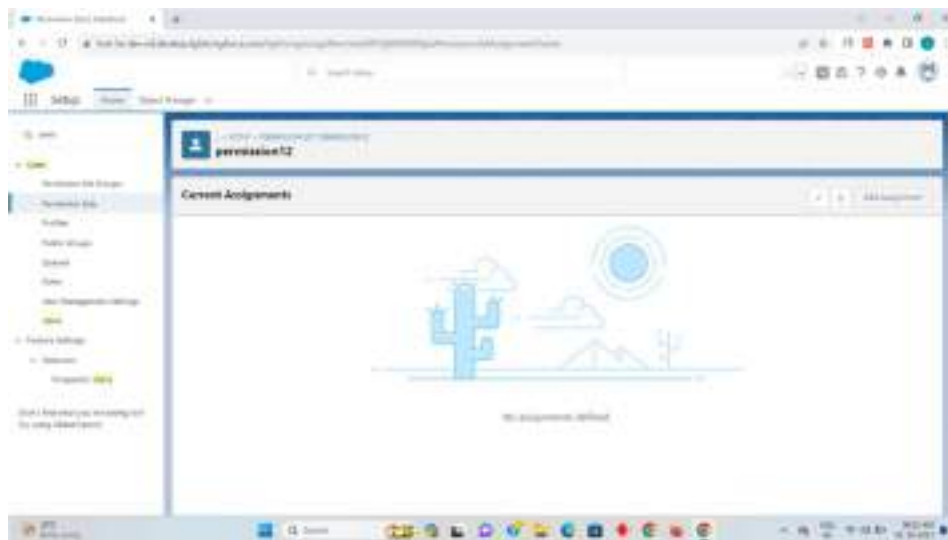
Step 7:

Now to give the specific delete access to the user click on edit on the Account and then enable the read,create,edit and the delete on it so that the permission set will have a specific special access on it. once it has been done click on save and then click on manage assignment.

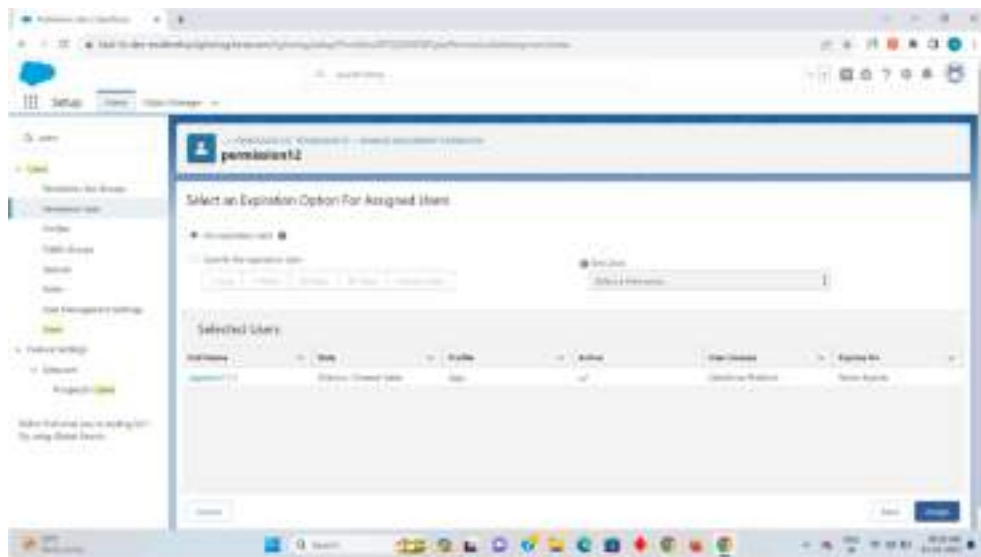


Step 8

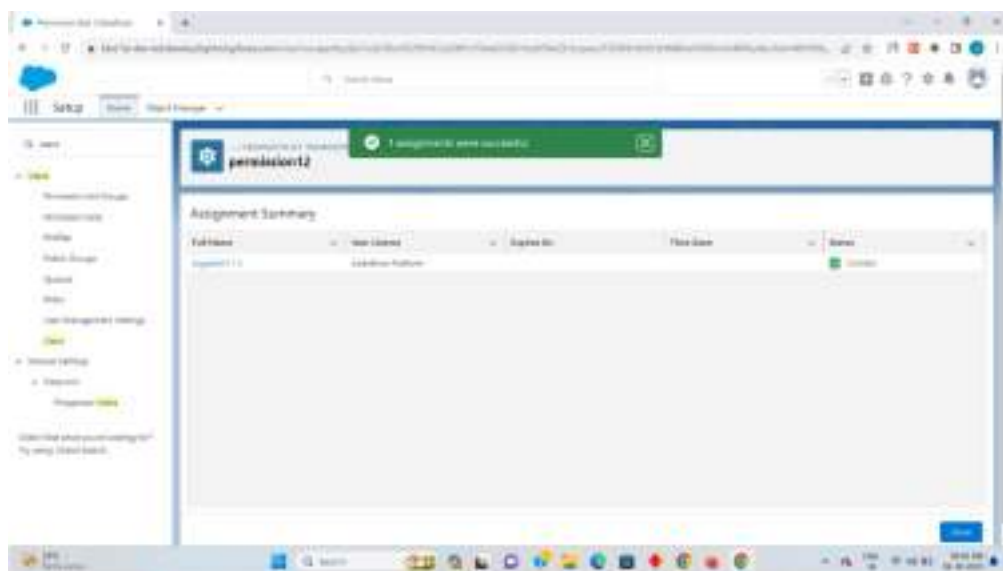
Now click on add assignment there you will find your two created users click on any one user to give a special access as delete on it and then click on assign so that the specific selected user can have a special access as delete on it.



Click on next.



Now click on Assign.



Now the specific access for the Jagadesh11 user has been assigned successfully.

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

Solution:

Step 1: Create a Custom Object

The next step is to create a custom object **Survey Result** and a few custom fields to store survey responses.

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

SETUP > OBJECT MANAGER

Survey Result

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

Fields & Relationships

8 Items, Sorted by Name

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

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

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

Email Template

Thank You Email - Survey

Edit in BuilderEditClone

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

☒

Message Content

Subject

Thank You For Completing Our Survey!

Enhanced Letterhead

HTML Value

Hi {{{Survey_Result__c.Name__c}}},

Thanks for taking time out to participate in our survey. We are very appreciative of the time you have taken to assist in our analysis, and commit to utilizing the information gained to contemplate and implement worthwhile improvements. We will share these results with you through your State Survey Agency, whom we also thank for their generous participation.

Once again, we are extremely grateful for your contributing your valuable time, your honest information, and your thoughtful suggestions.

Thanks,

Automation Champion

Additional Information

Created By

Rakesh Gupta, 12/21/2020, 4:23 PM

Last Modified By

Rakesh Gupta, 12/21/2020, 4:32 PM

Step 3: Create an Email Alert

1. Click **Setup**.
2. In the Quick Find box, type **Email Alerts**.
3. Select **Email Alerts**, click on the **New Email Alert** button.
4. **Name** the **Email Alert** and click the Tab button. The **Unique Name** will populate.

5. For **Object** select **Survey Result**.
6. For the **Email Template** chooses **Lightning Email Template Thank You Email – Survey**.
7. For **Recipient Type** select **Email Field:**
Email.
8. Click **Save**.

The screenshot shows the 'Email Alert Edit' interface in Salesforce. The page title is 'Survey - Thank You Email'. Below the title, there is a description: '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.' The page has three buttons at the top: 'Save', 'Save & New', and 'Cancel'. The main form area is divided into several sections. The 'Edit Email Alert' section includes fields for 'Description' (Survey - Thank You Email), 'Unique Name' (Survey_Thank_You_Email), 'Object' (Survey Result), 'Email Template' (Thank You Email - Survey), and 'Preferred Compartment'. The 'Recipient Type' section has a dropdown menu set to 'Email Field' and a 'Find' button. Below this, there are two columns: 'Available Recipients' and 'Selected Recipients'. The 'Available Recipients' column lists 'User: Integration User', 'User: Rakash Gupta', and 'User: Security User'. The 'Selected Recipients' column is currently empty. Between these columns are 'Add', 'Remove', and 'Reset' buttons. Below the recipient lists, there is a text area for 'Additional Emails' with a note: 'You can enter up to five (5) email addresses to be notified.' At the bottom, there is a 'From Email Address' section with a dropdown menu set to 'Current User's email address' and a checkbox to 'Make this address the default From email address for this object's email alerts.' The page also has 'Save', 'Save & New', and 'Cancel' buttons at the bottom.

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:
 1. **How do you want to start building: Freeform**
5. 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**
 1. Row 1:
 1. **Field: Comment__c**

2. **Value: {!Comment}**

2. **Click Add Row**

3. **Row 2:**

1. **Field: Email__c**

2. **Value: {!Email.value}**

4. **Click Add Row**

5. **Row 3:**

1. **Field: Name__c**

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

6. **Click Add Row**

7. **Row 3:**

1. **Field: Rating__c**

2. **Value: {!Rating}**

7. **Click Done.**

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

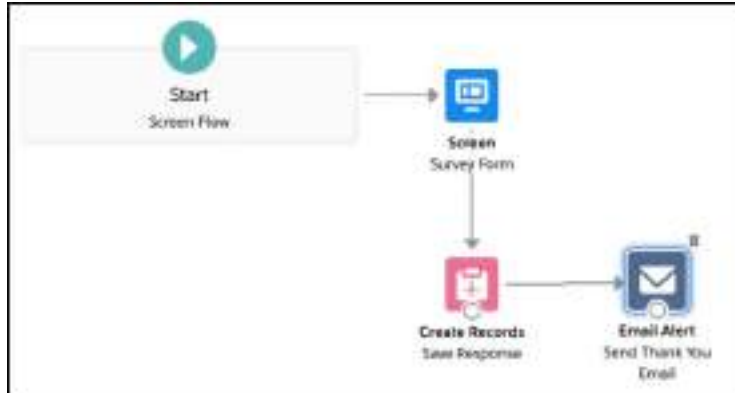
The next step is to call the **Survey – Thank You Email** email alert from flow so that when flow fires it triggers the thank you email to survey participants.

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**.

The screenshot shows a configuration window titled "Edit 'Survey - Thank You Email' email alert". It includes a header with instructions: "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." Below this, there are two input fields: "Label" with the value "Send Thank You Email" and "API Name" with the value "Send_Thank_You_Email". There is also a "Description" field which is empty. Under the "Set Input Values" section, there is a field for "Record ID" with the value "{Save_Response}". At the bottom right, there are "Cancel" and "Done" buttons.

In the end, Sergio's **Flow** will look like the following screenshot:



1. Click **Save**.
2. Enter **Flow Label** the **API Name** will auto-populate.
3. Click **Show Advanced**.

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

5. Type: Screen Flow

6. API Version for Running the Flow: 51

**7. Interview Label: Survey
{!\$Flow.CurrentDateTime}**

8. Click Save.

Save as

A New Version

A New Flow

* Flow Label

Survey

* Flow API Name

Survey

Description

Hide Advanced

How to Run the Flow ⓘ

User or System Context—Depends on How Flow is Launched

* Type

Screen Flow

* API Version for Running the Flow

51

Interview Label ⓘ

Insert a resource...

Survey (!\$Flow.CurrentDateTime)

Last Modified

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

Status:

Active

Type:

Screen Flow

Version Number:

2

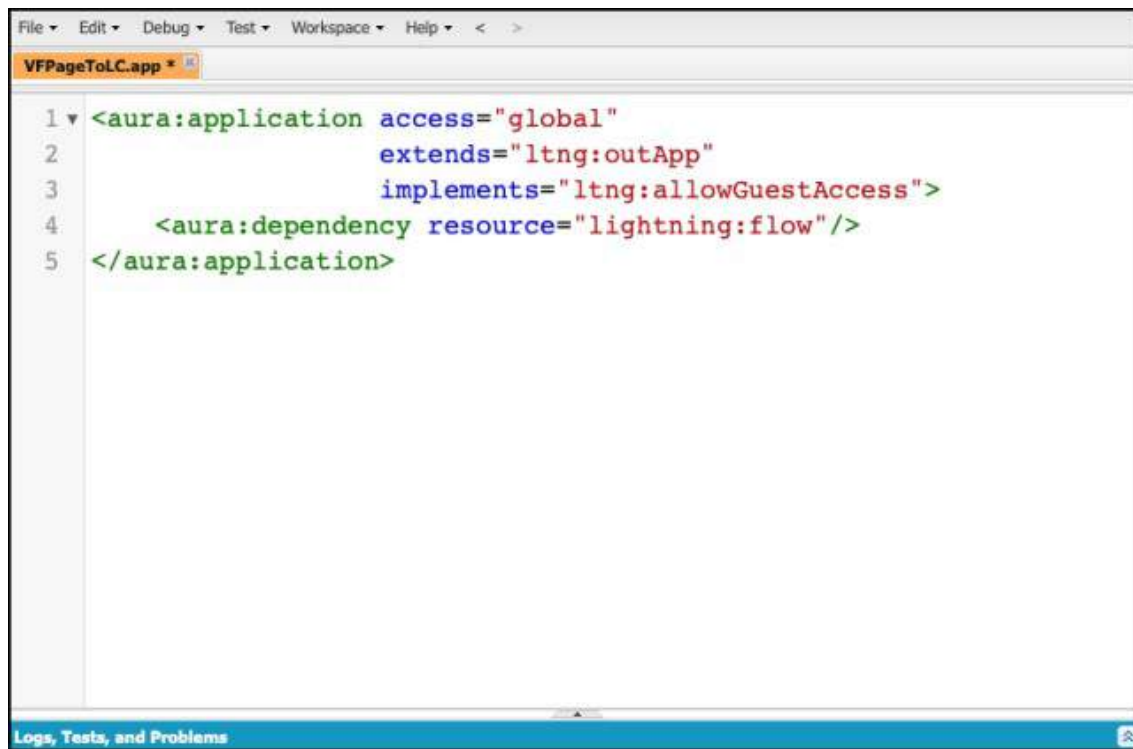
Cancel

Save

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

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

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



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

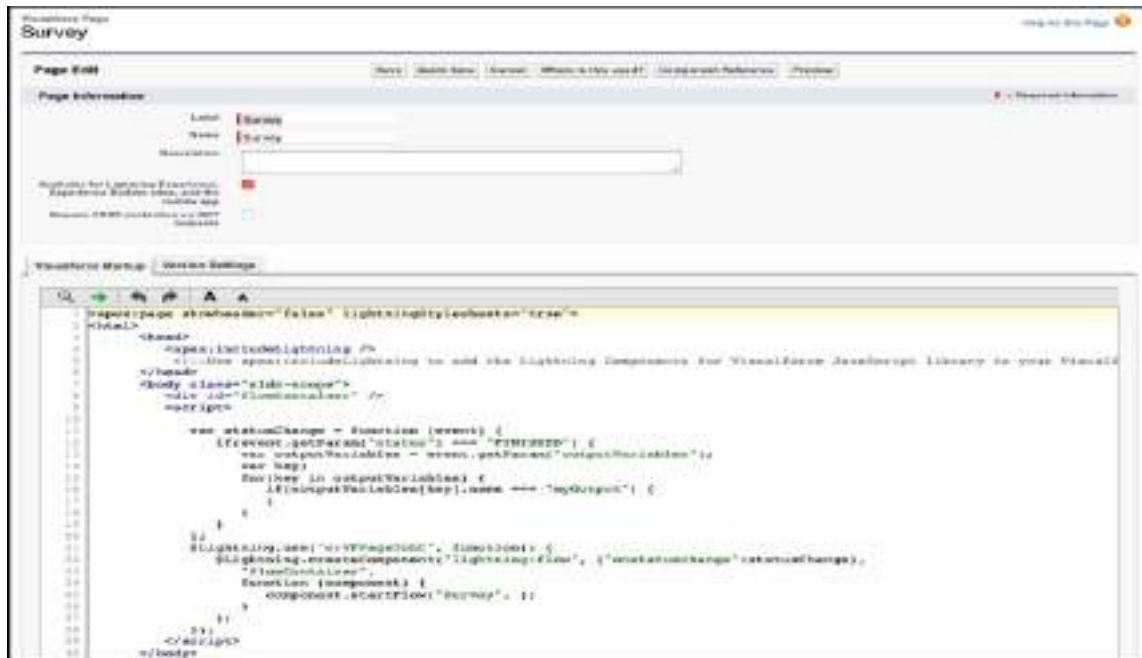
Step 6: Create a Visualforce Page and Embed Your Flow Into It

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

Add the Lightning Components for Visualforce JavaScript library to your Visualforce page using the **<apex:includeLightning/>** component. In the Visualforce page, reference the dependency app. Then write a JavaScript function that creates the

component on the page
using **\$Lightning.createComponent()**

1. Click **Setup**.
2. In the Quick Find box, type **Visualforce Pages**.
3. Clicks on the **New** button.
4. Copy code from **GitHub** and paste it into your visualforce page
5. Click **Save**.



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**.

The screenshot shows the 'Site Edit' form in Salesforce. The form is divided into several sections. The top section includes 'Site Label' (Survey), 'Site Name' (Survey), and 'Site Description' (empty text area). Below this is the 'Site Contact' section with 'Site Contact' (Robert Gupta) and 'Default Record Owner' (Robert Gupta). The 'Default Web Address' is 'http://dell-developer-edition.getsiteurl.com/survey'. The 'Active' checkbox is checked. The 'Active Site Home Page' is 'Survey' and the 'Inactive Site Home Page' is 'Introduction'. The 'Site Template' is 'Introduction'. The 'Site Metadata' section includes 'Site Metadata ID' (empty) and 'Display Tracking Code' (empty). The 'URL Redirect Class' is empty. The 'Enable Field' checkbox is checked. The 'Clickjack Protection Level' is set to 'Allow tracking by the same origin only (Recommended)'. The 'Require Secure Connections' checkbox is checked. The 'Lightning Features for Users' checkbox is checked. The 'Upgrade all requests to HTTPS' checkbox is checked. The 'Enable Content Security' checkbox is checked. The 'Enable Browser Cross Site Scripting Protection' checkbox is checked. The 'Referrer Policy Protection' checkbox is checked. The 'Guest Access to the Payments API' checkbox is unchecked.

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: _____

State: _____

City: _____

Country: _____

Phone: _____

Email: _____

Training: ☐ Yes ☐ No

Comments: _____

Submit

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

