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Salesforce Developer(Course)
Assignment No :1

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Year & Dep : IV year & CSE

Batch : 2024
Zone no : Zone 8

1. Creating a Master-Detail Relationship between two custom objects

and setting up a Roll-Up Summary Field to calculate the total number of records in the child object is a common task in Salesforce. Below are the steps to achieve this:

Step 1: Create Custom Objects.

The screenshot shows the 'Custom Object Definition Edit' page for creating a new object named 'Parent'. The 'Custom Object Information' section includes fields for Label ('Parent'), Plural Label ('Parents'), and Object Name ('Parent'). The 'Enter Record Name Label and Format' section includes a 'Record Name' field set to 'Parent Name' and a 'Data Type' of 'Text'. A note at the bottom states: '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.'

The screenshot shows the 'Custom Object Definition Edit' page for creating a new object named 'Child'. The 'Custom Object Information' section includes fields for Label ('Child'), Plural Label ('Children'), and Object Name ('Child'). The 'Enter Record Name Label and Format' section includes a 'Record Name' field set to 'Child Name' and a 'Data Type' of 'Text'. A note at the bottom states: '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.'

Step 2: Create a Master-Detail Relationship

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

The screenshot shows the Salesforce Object Manager interface for the 'Parent' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and displays four items. A table lists the fields:

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)		✓

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER Parent

Fields & Relationships

- Details
- 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

Setup Home Object Manager

SETUP > OBJECT MANAGER Parent

Fields & Relationships

- Details
- 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

Step 3: Create a Roll-Up Summary Field

1. In the same "Parent" editing page, scroll down to the "Roll-Up Summary Fields" section.
2. Click "New Roll-Up Summary Field."
3. Choose the "Child" as the child object for which you want to calculate

the total.

4. Give your Roll-Up Summary Field a name (e.g., "Total_Child_Records__c").
5. Choose the type of calculation you want (e.g., "COUNT").
6. Configure any additional filter criteria if needed.
7. Save the changes.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. The main content area displays sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Under 'Custom Object Tabs', there is a table with four rows:

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

Under 'Web Tabs', it says 'No Web Tabs have been defined'. Under 'Visualforce Tabs', it says 'No Visualforce Tabs have been defined'. Under 'Lightning Component Tabs', it says 'No Lightning component tabs have been defined'. Under 'Lightning Page Tabs', it says 'New | What Is This?'. There is also a note at the top of the page: 'Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.'

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

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

Lightning Experience App Manager

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

New Lightning App

App Details & Branding

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

App Details	App Branding
* App Name <input type="text" value="Parent Details"/>	Image <input type="file"/>
* Developer Name <input type="text" value="Chandru s"/>	Primary Color Hex Value <input type="text" value="#0070D2"/>
Description <input type="text" value="Enter a description..."/>	Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme
App Launcher Preview	

Next

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

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

That's it! You've successfully created a Master-Detail relationship

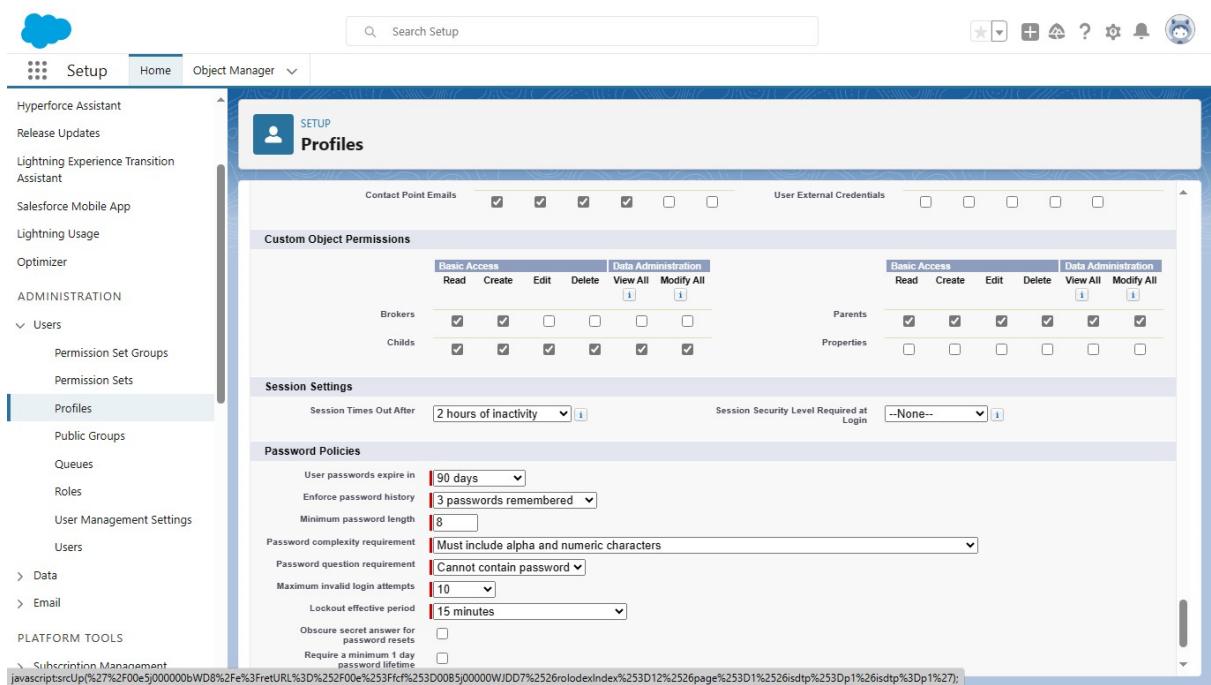
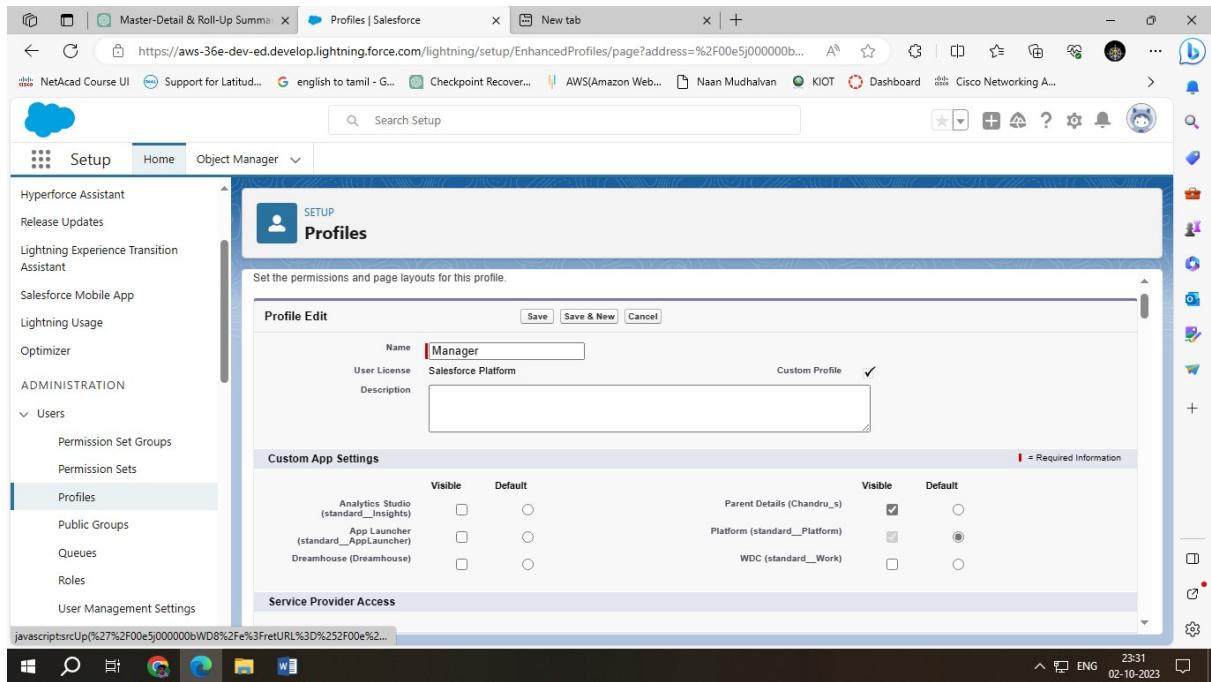
between two custom objects (Parent and Child) and set up a Roll-Up Summary Field to calculate the total number of records in the Child object.

The screenshot shows a Salesforce interface for a 'Parent' object named 'CHANDRU SEKAR'. The page has a header with a search bar and various navigation icons. Below the header, there are tabs for 'Related' and 'Details'. The 'Details' tab is selected, showing fields for 'Parent Name' (CHANDRU SEKAR), 'Child' (CS Alina), 'Created By' (Chandru S. on 03/10/2023, 10:35 am), and 'Last Modified By' (Chandru S. on 03/10/2023, 10:35 am). A large blue background area contains faint topographic map lines. At the bottom left, there is a link to 'History'.

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

Step 1: Create a Public Group

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



Step 2: Create Criteria-Based Sharing Rules

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

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

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

4. Create a rule that shares records owned by members of "UserB_Group" with the "UserA_Group."

5. Define the criteria based on which records should be shared (e.g., ownership).

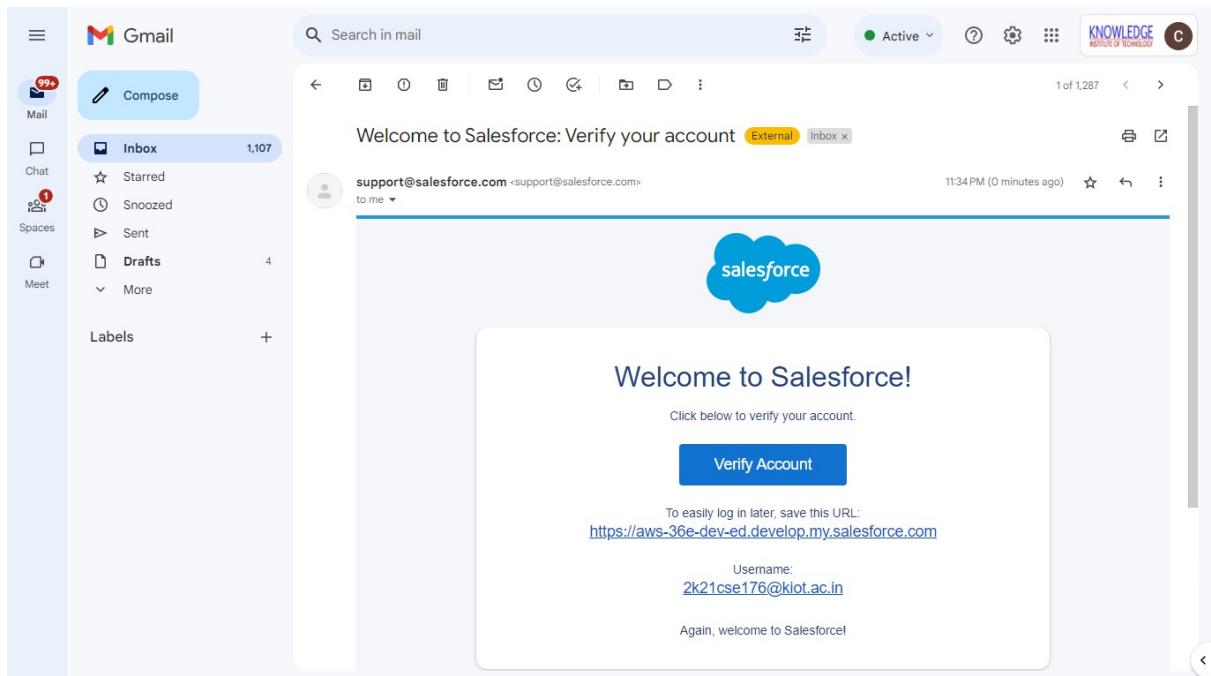
6. Save the sharing rule.

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

Field	Value
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	<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 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 user record for 'Sunil A' is displayed with the following details:

Field	Value
Name	Sunil A
Alias	sa
Email	2k20cse176@kiot.ac.in (Verify)
Username	2k21cse176@kiot.ac.in
Nickname	User169631476178576A93816
Title	
Company	Male
Department	
Division	
Address	2/73 Kolankondai(p.o) Mallasamudram 637503 Tamil Nadu India
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	Manager
Receive Approval Request Emails	Only if I am an approver
Federation ID	
Role	Salesforce Platform
User License	
Profile	Manager
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	View
Data.com Monthly Addition Limit	
Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>



The screenshot shows the "Change Your Password" page for a user with the email 2k21cse176@kiot.ac.in. The page includes fields for "New Password" and "Confirm New Password", both of which are marked as "Good" and "Match". It also includes a security question "In what city were you born?" with the answer "SALEM" and a note that "Caps Lock is on". A "Change Password" button is at the bottom.

Bmanager

Profile Edit

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

Custom App Settings

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

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings: Home Default On

Learning: Default On

Custom Object Permissions

Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Push Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>	Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>	User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in:	90 days	Basic Access	Read	Create	Edit	Delete	Data Administration	View All	Modify All
Enforce password history:	3 passwords remembered	Brokers	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Minimum password length:	8	Childs	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Password complexity requirement:	Must include alpha and numeric characters	Parents	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Password question requirement:	Cannot contain password	Properties	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Maximum invalid login attempts:	10								

For User B:

- Follow the same steps as above but create a separate sharing rule for User B.
- This rule should share records owned by members of "UserA_Group" with the "UserB_Group."

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

4. Save the sharing rule.

The screenshot shows the 'New User' page in the Salesforce Setup interface. The user details entered are:

- First Name: Sanjay
- Last Name: P
- Alias: sp
- Email: 2k20cse171@kiot.ac.in
- Username: 2k22cse171@kiot.ac.in
- Nickname: User1696315620912300622
- Role: <None Specified>
- User License: Salesforce Platform
- Profile: Bmanager
- Active: checked
- Marketing User: unchecked
- Offline User: unchecked
- Knowledge User: unchecked
- Flow User: unchecked
- Service Cloud User: unchecked
- Site.com Contributor User: unchecked
- Site.com Publisher User: unchecked
- WDC User: unchecked
- Data.com User Type: --None--
- Data.com Monthly Addition Limit: Default Limit (300)
- Accessibility Mode (Classic Only): unchecked
- High-Contrast Palette on Charts: unchecked
- Load Lightning Pages While: checked

Step 3: Assign Records Ownership

The screenshot shows the 'Permission Set Create' page in the Salesforce Setup interface. The permission set information entered is:

- Label: permission
- API Name: permission
- Description: (empty)
- Session Activation Required: unchecked

The 'Select the type of users who will use this permission set' section includes a note about choosing a license type. The 'Who will use this permission set?' section lists three options:

- 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?' link is present. The 'License' dropdown is set to --None--.

Setup Home Object Manager

SETUP Permission Sets

Permission Set permission

Object Settings

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

Object Settings Overview > Object Settings

Video Tutorial | Help for this Page

Setup Home Object Manager

SETUP Permission Sets

Permission Set permission

Object Settings

Childs

Save Cancel

Tab Settings

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

Object Permissions

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

Field Permissions

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

Object Settings Overview > Object Settings > Childs

Video Tutorial | Help for this Page

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.eodfziksrf@chatter.salesforce.com	Chatter Free User
Integration User	integ	integration@00d5j00000cismqean.com	Analytics Cloud Integration User
Sanjay P	sp	2k22cse171@kiot.ac.in	Bmanager
Security User	sec	insightsecurity@00d5j00000cismqean.com	Analytics Cloud Security User
Sunil A	sa	2k21cse176@kiot.ac.in	Manager

Cancel Next

Subscription Management

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

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

permission

Select an Expiration Option For Assigned Users

No expiration date

Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date Time Zone Select a time zone...

Selected Users

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

Cancel Back Assign

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

... > PERMISSIONS permission

1 assignments were successful.

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Sunil A	Salesforce Platform			Success

Done

This screenshot shows the Salesforce Setup interface. The left sidebar includes links for 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, Data, Email, Platform Tools, and Subscription Management. The main content area is titled 'permission' and displays a success message: '1 assignments were successful.' Below this is an 'Assignment Summary' table with one row for 'Sunil A' assigned to 'Salesforce Platform'. The status is marked as 'Success'. A 'Done' button is at the bottom right.

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_Book_Entry
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

This screenshot shows the Salesforce Setup interface. The left sidebar includes links for 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, Data, Email, Platform Tools, and Subscription Management. The main content area is titled 'Permission Sets' and lists various permission sets and their access levels. A table provides a detailed view of permissions like 'Operating Hours Holidays', 'Opportunities', 'Opportunity_Contact_Role', etc., with counts for 'No Access' and other categories. A code snippet at the bottom of the page is: 'javascript:srcSelf("%2F0PS5j000007Ux0%3Fs%3DentityPermissions%26o%3D0115...")'.

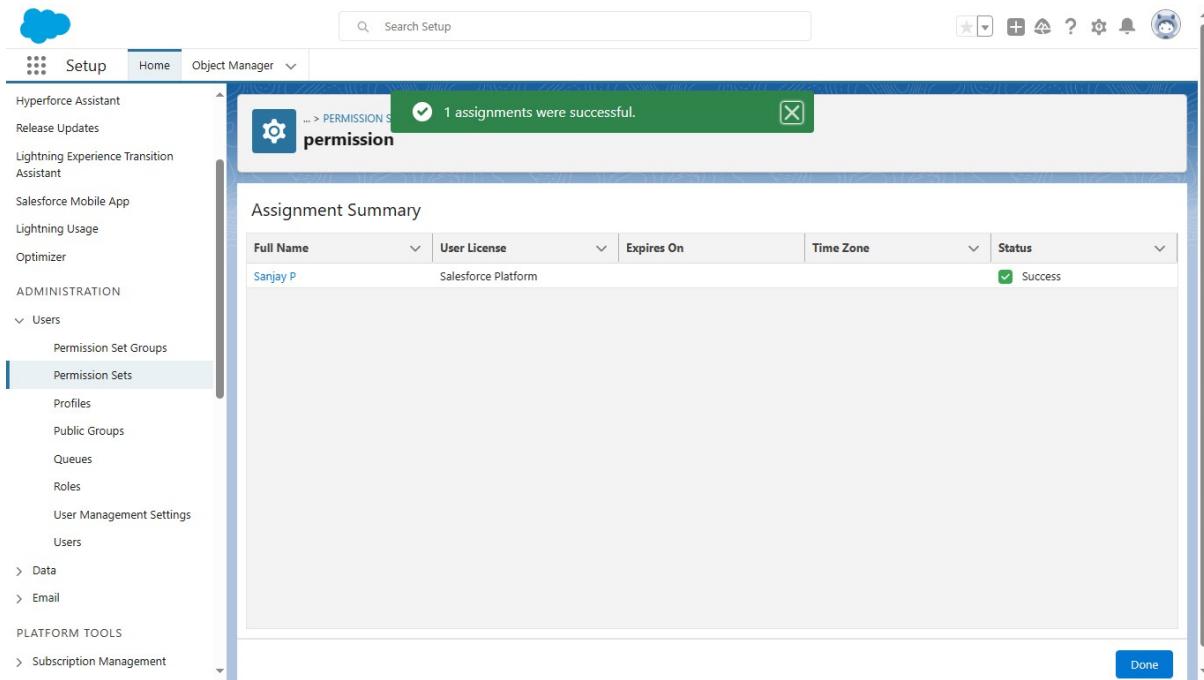
The screenshot shows the Salesforce Setup interface with the following details:

- Left Sidebar:** Shows navigation categories like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users, Permission Set Groups, and Permission Sets.
- Header:** Includes a search bar ("Search Setup"), a cloud icon, and various setup tools.
- Main Content:** The "Permission Sets" page for a permission set named "permission".
 - Parents:** Available tab selected, showing no parents.
 - Tab Settings:** Shows "Visible" status.
 - Object Permissions:** A table showing permissions for various actions (Read, Create, Edit, Delete, View All, Modify All) across different profiles.
 - Field Permissions:** A table showing permissions for field types (Child, Created By) across different profiles.
- URL:** https://aws-36e-dev-ed.my.salesforce.com/one/one.app#/alohaRedirect/0PS5j000007Uxo/e?s=EntityPermissions&o=015j000002r5H&isotp=p1

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

- Left Sidebar:** Shows navigation categories like Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users, Permission Set Groups, and Permission Sets.
- Header:** Includes a search bar ("Search Setup"), a cloud icon, and various setup tools.
- Main Content:** The "Manage Assignment Expiration" page for the "permission" permission set.
 - Section:** ... > PERMISSION SET 'PERMISSION' > MANAGE ASSIGNMENT EXPIRATION
 - Header:** permission
 - Section:** Select Users to Assign
 - Table:** A list of users assigned to the permission set, including their full name, username, role, and profile.

Full Name	Username	Role	Profile
Chandru S	au611220104303@naanmudhalvan.com	System Administrator	
Chatter Expert	chatty.00d5j00000cismqean.eodfzikbsrf@chatter.salesforce.com	Chatter Free User	
Integration User	integration@00d5j00000cismqean.com	Analytics Cloud Integration User	
Sanjay P	2k22cse171@kiot.ac.in	Bmanager	
Security User	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 for Delete Access

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

Lightning Usage

Optimizer

ADMINISTRATION

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

PLATFORM TOOLS

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

SETUP Users

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](#)

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

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	A_Sunil	sa	2k21cs176@kiot.ac.in		<input checked="" type="checkbox"/>	Manager
Edit	Chatter_Expert	Chatter	chatty.00d500000cismoean.eodfzkibsrf@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	P_Sanjay	sr	2k22cs171@kiot.ac.in		<input checked="" type="checkbox"/>	Manager
Edit	S_Chandru	CS	su611220104303@naanmudhalvan.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@00d500000cismoean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d500000cismoean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

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

Lightning Usage

Optimizer

ADMINISTRATION

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

PLATFORM TOOLS

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

SETUP Profiles

Profiles

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

New Profile [Edit](#) [Delete](#) [Create New View](#)

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Security User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Del ...	BManager	Salesforce Platform	<input checked="" type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Clone	Contact Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Cross_Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del ...	Custom_Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom_Sales Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom_Support Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Customer_Community_Login User	Customer Community Login	<input type="checkbox"/>
Edit Clone	Customer_Community_Plus_Login User	Customer Community Plus Login	<input type="checkbox"/>
Edit Clone	Customer_Community_Plus User	Customer Community Plus	<input type="checkbox"/>

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

1-25 of 41 | 0 Selected | [Previous](#) [Next](#) | Page 1 of 2

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A modal window titled 'Clone Profile' is open, prompting the user to enter a new profile name ('Manager') and select an existing profile to clone from ('Standard Platform User').

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A modal window titled 'Profile Detail' displays the configuration for the 'chan' profile, including its name ('chan'), user license ('Salesforce Platform'), and creation details ('Created By: Chandru S. 03/10/2023, 1:50 pm'). The 'Page Layouts' section lists various standard object layouts assigned to the profile.

Object	Layout	Assignment
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	[View Assignment]

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings). The main content area displays the 'Profiles' configuration screen, which includes sections for Basic Access (Read, Create, Edit, Delete, View All, Modify All) for Brokers, Parents, and Properties; Session Settings (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login: None); and Password Policies (User passwords expire in: 90 days, Enforce password history: 3 passwords remembered, Minimum password length: 8, Password complexity requirement: Must include alpha and numeric characters, Password question requirement: Cannot contain password, Maximum invalid login attempts: 10, Lockout effective period: 15 minutes, Obscure secret answer for password resets, Require minimum 1 day password change, and Don't immediately expire links in forgot password emails). Buttons at the bottom include Save, Save & New, and Cancel.

The screenshot shows the Salesforce Setup interface with the 'Profile Edit' page for a profile named 'chan'. The left sidebar is identical to the previous screenshot. The main content area displays the 'Profile Edit' screen for 'chan', which includes fields for Name (chan), User License (Salesforce Platform), and Custom Profile (checked). Below these are sections for Custom App Settings (with rows for Analytics Studio (standard_Insights), App Launcher (standard_AppLauncher), Dreamhouse (Dreamhouse), Parent Details (Chandru_s), Platform (standard_Platform), and WDC (standard_Work)), Service Provider Access, Tab Settings (with an option to Overwrite users' personal tab customizations), and Standard Tab Settings (with tabs for Home and Default On). A note at the top right indicates 'Help for this Page'.

The screenshot shows the Salesforce Lightning Experience interface. The left sidebar is titled 'ADMINISTRATION' and includes sections for 'Optimizer', 'Users' (which is currently selected), 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Data' and 'Email' under 'Data'. The main content area is titled 'All Users' and displays a table of users. The table columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	A_Sunil	sa	2k2cse176@kiot.ac.in	Manager	<input checked="" type="checkbox"/>	
Edit	Chatter_Expert	Chatter	chatty.00d5000000cismoean.eodfzibtsrf@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
Edit	P_Sanjay	SR	2k2cse171@kiot.ac.in	Manager	<input checked="" type="checkbox"/>	
Edit	S_Chandru	CS	au811220104303@naanmudhalvan.com	System Administrator	<input checked="" type="checkbox"/>	
Edit	User_Integration	integ	integration@00d5000000cismoean.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
Edit	User_Security	sec	insightssecurity@00d5000000cismoean.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the one in the top screenshot, with sections for 'Optimizer', 'Users' (selected), 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Data' and 'Email'. The main content area is titled 'New User' and shows a 'User Edit' form. The 'General Information' section contains fields for First Name (Sunil), Last Name (A), Alias (sa), Email (2k2cse176@kiot.ac.in), Username (2k2cse176@kiot.ac.in), Nickname (User1696321490080232961), Title (Blank), Company (Male), Department (Blank), and Division (Blank). On the right side, there are checkboxes for various user roles and settings, including 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 (set to 'None'), Data.com Monthly Addition Limit (set to 'Default Limit (300)'), Accessibility Mode (Classic Only) (unchecked), High-Contrast Palette on Charts (unchecked), and Load Lightning Pages While (unchecked).

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 user's details include:

- User Name:** Sunil A
- Alias:** sa
- Email:** 2k20cse176@kiot.ac.in (Verify)
- Username:** 2k23cse176@kiot.ac.in
- Nickname:** User16963214900802329619
- Title:** Male
- Department:** 275 Kolankondai(p.o) Mallasamudram 637503 Tamil Nadu India
- Address:** 275 Kolankondai(p.o) Mallasamudram 637503 Tamil Nadu India
- Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale:** English (India)
- Language:** English
- Delegated Approver:** Manager
- Receive Approval Request Emails:** Only if I am an approver
- Federation ID:**

On the right side of the detail page, there are several tabs: Role (Salesforce Platform), User License (Profile chan), Active (checkmark), Marketing User (checkbox), Offline User (checkbox), Knowledge User (checkbox), Flow User (checkbox), Service Cloud User (checkbox), Site.com Contributor User (checkbox), Site.com Publisher User (checkbox), WDC User (checkbox), Mobile Push Registrations (View), Data.com User Type (checkbox), Accessibility Mode (Classic Only) (checkbox), Debug Mode (checkbox), and High-Contrast Palette on Charts (checkbox). A 'User ProfileHelp for this Page' link is also present.

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 user's details are identical to the ones shown in the previous screenshot, with the exception of the 'Role' field which is currently set to '<None Specified>'. The rest of the fields and their values remain the same.

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

1. In the "Permission Set Detail" page, click on "Manage Assignments."
2. Click "Add Assignments" and select the user who needs delete access.
3. Save the assignment.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled "Setup" and includes links for "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Hyperforce Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", "Optimizer", and "ADMINISTRATION". Under "ADMINISTRATION", there is a "Users" section with "Permission Set Groups" and "Permission Sets". The "Permission Sets" link is selected. The main content area is titled "Permission Sets" and shows a "Permission Set Overview" for "permission01". The "Edit Properties" dialog is open, showing fields for "Label" (set to "permission01"), "API Name" (set to "permission01"), "Description" (empty), and "Session Activation Required" (unchecked). Below the dialog, sections for "App Permissions", "Apex Class Access", "Visualforce Page Access", and "External Data Source Access" are visible.

The screenshot shows the Salesforce Setup interface, similar to the first one but with a different focus. The left sidebar is identical. The main content area is titled "Permission Sets" and shows the "Permission Set Overview" for "permission01". The "Object Settings" tab is selected, showing the "Accounts" section. Under "Object Permissions", there is a table for "Accounts" with columns "Permission Name" and "Enabled". The permissions listed are Read, Create, Edit, Delete, View All, and Modify All, all of which are checked. Below this is a "Field Permissions" section with a table for "Account". The columns are "Field Name", "Read Access", and "Edit Access". The rows include Account Name, Account Number, Account Owner, Account Site, Account Source, Active, and Annual Revenue, with various combinations of checkboxes checked.

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

- Left Sidebar:** Includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users.
- Current Page:** Permission Sets
- Content Area:** Displays the "Permission Set permission01" configuration screen. It includes sections for Object Permissions (Accounts) and Field Permissions (Account). The Accounts section shows permissions for Read, Create, Edit, Delete, View All, and Modify All. The Field Permissions section lists Account Name, Account Number, Account Owner, Account Site, Account Source, Active, and Annual Revenue with their respective Read Access and Edit Access checkboxes.

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

- Left Sidebar:** Includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users.
- Current Page:** All Users
- Content Area:** Displays a list of users with the following columns: Full Name, Alias, Username, Role, Access, and Profile. The list includes:
 - Chandru S (CS) - au611220104303@naanmudhalvan.com - System Administrator
 - Chatter Expert (Chatter) - chatter.00d5j00000cismqean.eodfzikibsr@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 - chan
 - Sunil A (sa) - 2k23cse176@kiot.ac.in - chan

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. Under 'ADMINISTRATION / Users', 'Permission Sets' is selected. The main content area displays a table titled 'Selected Users' with two rows: 'Sunil A' and 'Sunil A'. The table columns are 'Full Name', 'Role', 'Profile', 'Active', 'User License', and 'Expires On'. At the top, there are options for 'No expiration date' or 'Specify the expiration date' (with choices for 1 Day, 1 Week, 30 Days, 60 Days, or Custom Date) and a 'Time Zone' dropdown. Below the table are 'Back' and 'Assign' buttons.

The screenshot shows the Salesforce Setup interface after the assignment. A green success message at the top states '... > PERMISSION S ... 2 assignments were successful.' The main content area shows the 'Assignment Summary' table with two rows for 'Sunil A'. The columns are 'Full Name', 'User License', 'Expires On', 'Time Zone', and 'Status'. Both rows show 'Success' under 'Status'. At the bottom right is a 'Done' button.

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

Step 1: Create a custom object

1.Click Setup.

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

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

4. Click Save.

The screenshot shows the Salesforce Object Manager interface. At the top, it says "SETUP > OBJECT MANAGER" and the object name is "Survey Result". On the left, there's a sidebar with various options like 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, and Validation Rules. The main area is titled "Fields & Relationships" and contains 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 has checkboxes next to each row, with some checked (e.g., Owner, Survey Result Name).

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

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

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

Email Template
Thank You Email - Survey

Details Related

Information

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

Message Content

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

Additional Information

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

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

Edit Email Alert
Survey - Thank You Email Help for this Page 

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		<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>
Edit Email Alert = Required Information		
Description	<input type="text" value="Survey - Thank You Email"/>	
Unique Name	<input type="text" value="Survey_Thank_You_Email"/> 	
Object	<input type="text" value="Survey Result"/>	
Email Template	<input type="text" value="Thank You Email - Survey"/> 	
Protected Component	<input type="checkbox"/>	
Recipient Type	Search: <input type="text" value="User"/>  for: <input type="text"/> <input type="button" value="Find"/>	
Recipients	Available Recipients User: Integration User User: Rakesh Gupta User: Security User	Selected Recipients Email Field: Email
	<input type="button" value="Add"/>  <input type="button" value="Remove"/> 	
You can enter up to five (5) email addresses to be notified. Additional Emails <input type="text"/>		
From Email Address	<input type="text" value="Current User's email address"/>  <input type="checkbox"/> Make this address the default From email address for this object's email alerts. 	
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>		

Step 4.1: Salesforce Flow – Create a Screen that Allow Users to Fill Survey

- 1.Click Setup.
- 2.In the Quick Find box, type Flows.
- 3.Select Flows then click on the New Flow.
- 4.Select the Screen Flow option and click on Next and configure the flow as follows:
- 5.How do you want to start building: Freeform
- 6.We will use the Screen element to capture a Survey response form. Drag and drop a Screen element onto the canvas.

Step 4.2: Salesforce Flow – Add a Record Creates Element to Save

Survey Response

- 1.Drag-and-drop the Create Records element onto the Flow designer.
- 2.Enter a name in the Label (Save Response) field; the API Name will auto-populate.
- 3.For How Many Records to Create – select One.
- 4.For How to Set the Record Fields – select Use separate resources, and literal values.
- 5.Select the Survey_Result__c object from the dropdown list.
- 6.Set Field Values for the Survey Result

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row3:

Field: Name__c

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

Click Add Row

Row 3:

Field: Rating__c

Value: {!Rating}

7.Click Done.

Edit Create Records

Create Salesforce records using values from the flow.

*Label <input type="text" value="Save Response"/>	*API Name <input type="text" value="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 <input type="text" value="Survey Result"/>
--

Set Field Values for the Survey Result

Field	Value
<input type="text" value="Comment__c"/>	← <input type="text" value="A_a Comment X"/> ✖
<input type="text" value="Email__c"/>	← <input type="text" value="A_a Email > Value X"/> ✖
<input type="text" value="Name__c"/>	← <input type="text" value="(!Name.firstName) (!Name.lastName)"/> ✖
<input type="text" value="Rating__c"/>	← <input type="text" value="A_a Rating X"/> ✖
+ Add Field <input type="checkbox" value="Manually assign variables"/> Manually assign variables	
Cancel Done	

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

- 1.Under Toolbox, select Element.
- 2.Drag-and-drop Action element onto the Flow designer.
- 3.In the Action box, type Survey – Thank You Email.
- 4.Clicks on the Survey – Thank You Email email alert.
- 5.Click Done.

Edit "Survey - Thank You Email" email alert

Use values from earlier in the flow to set the inputs for the "Survey - Thank You Email" email alert. To use its outputs later in the flow, store them in variables.

* Label

Send Thank You Email

* API Name

Send_Thank_You_Email

Description

Set Input Values

A3 * Record ID

{!Save_Response}

[Cancel](#)

[Done](#)

Save as

A New Version
A New Flow

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

Cancel
Save

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

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

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

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

VFPageToLC.app *

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

Logs, Tests, and Problems

```

1 <apex:page showheader="false" lightningStylesheets="true">
2 <html>
3   <head>
4     <apex:includeLightning />
5     <!--Use apex:includeLightning to add the Lightning Components for Visualforce JavaScript library to your Visualf
6   </head>
7   <body class="slds-scope">
8     <div id="flowContainer" />
9     <script>
10
11       var statusChange = function (event) {
12         if(event.getParam("status") === "FINISHED") {
13           var outputVariables = event.getParam("outputVariables");
14           var key;
15           for(key in outputVariables) {
16             if(outputVariables[key].name === "myOutput") {
17               ...
18             }
19           }
20         };
21         $Lightning.use("c:VFPPageToLC", function() {
22           $Lightning.createComponent("lightning:flow", {"onstatuschange":statusChange},
23             "flowContainer",
24             function (component) {
25               component.startFlow("Survey", );
26             }
27           );
28         });
29       </script>
30     </body>

```

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

Now we will create a site to open the flow for unauthenticated access.

- 1.Click Setup.
- 2.In the Quick Find box, type Sites.
- 3.Clicks on the New button.
- 4.Fill the details as per the screenshot below:
- 5.Click Save.

Site Edit

Save **Cancel**

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

Under site, Public Access Settings make sure that guest users have Create access on Survey Result object and Edit on the fields.

Proof of Concept

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

Survey

Name

First Name

Alok

Last Name

Sinfal

*Email

[REDACTED]

*Rating

5

*Comment

Awesome Blog



Next



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

Row 1:

Field: Comment__c

Value: {!Comment}

Click Add Row

Row 2:

Field: Email__c

Value: {!Email.value}

Click Add Row

Row 3:

Field: Name__c

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

Click Add Row

Row 3:

Field: Rating__c

Value: {!Rating}

Click Done.