

Naan Mudhalvan
Salesforce Developer(Course)
Assignment no 1

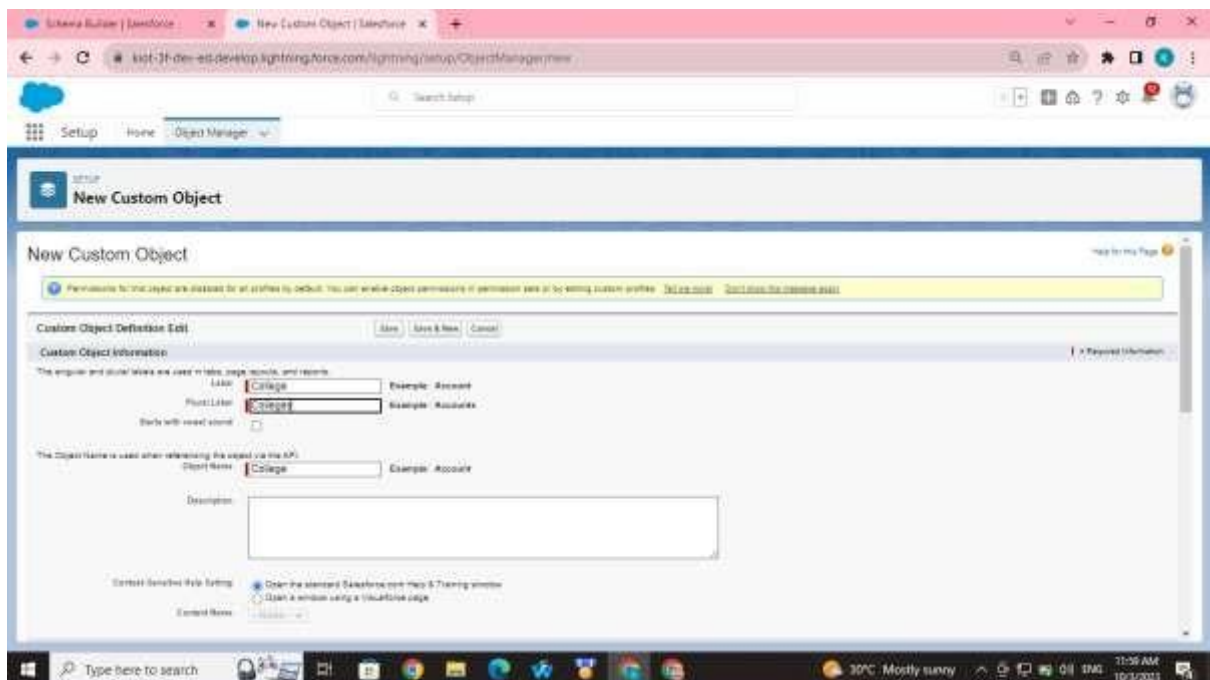
Name :Kisshore S V
Naan Mudhalvan id : au611220205016
Year & Dep : 4th year & IT
Batch : 2024
Zone no : Zone 8

1. Create a Master-Detail Relationship between two Custom objects and also create a Roll Up Summary Field to Calculate total number of records.

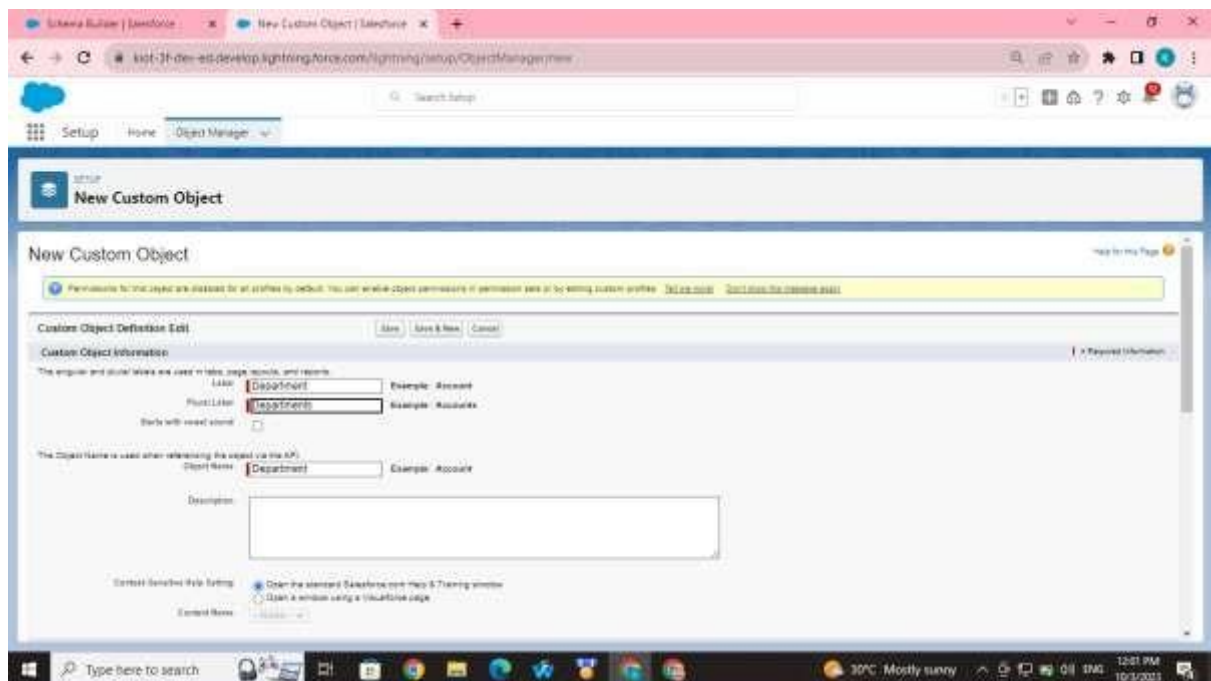
Solution:

Step 1: Create Custom Objects

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



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

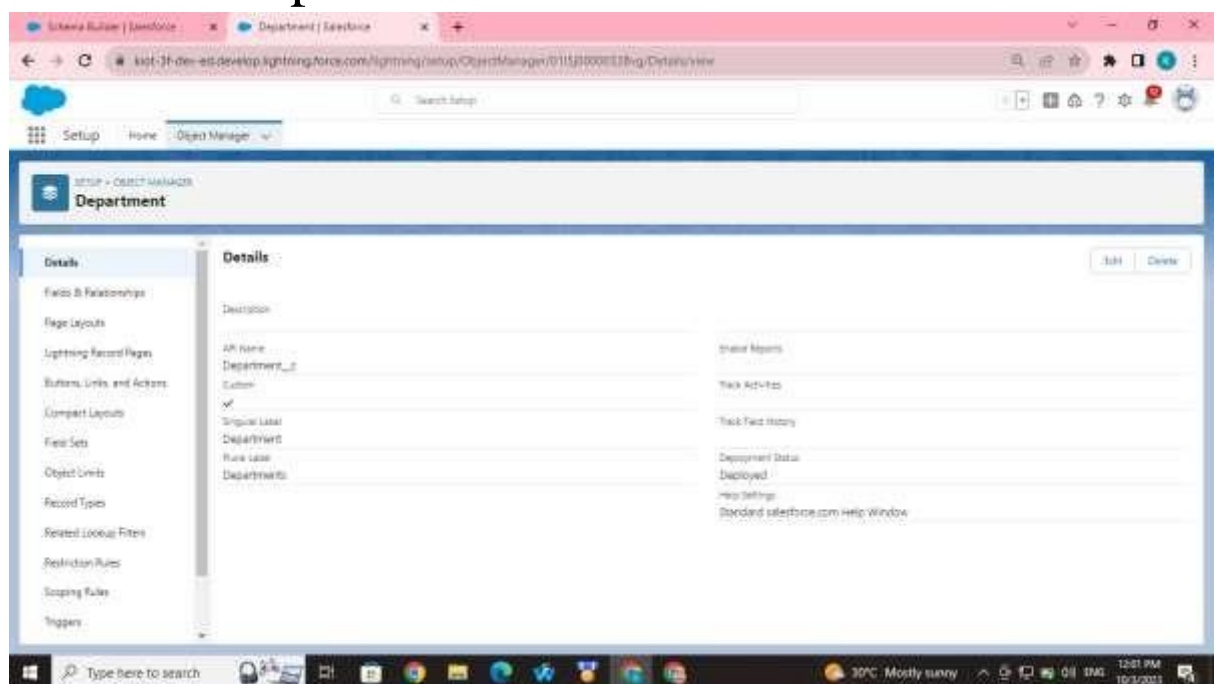


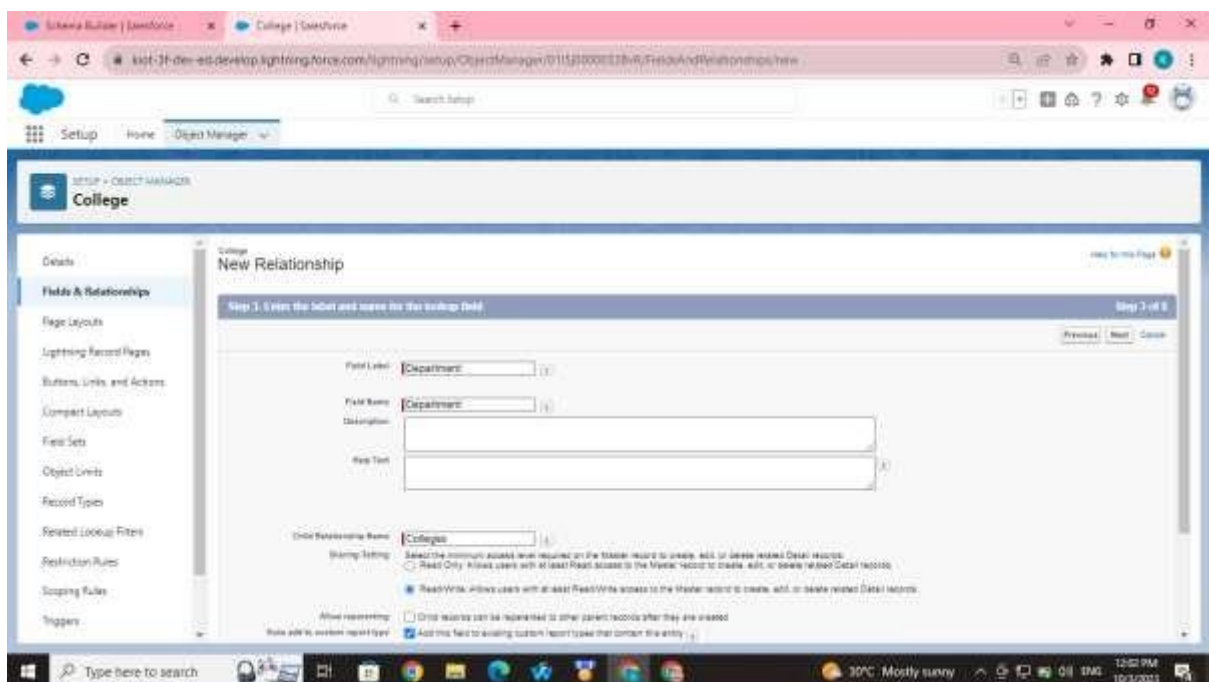
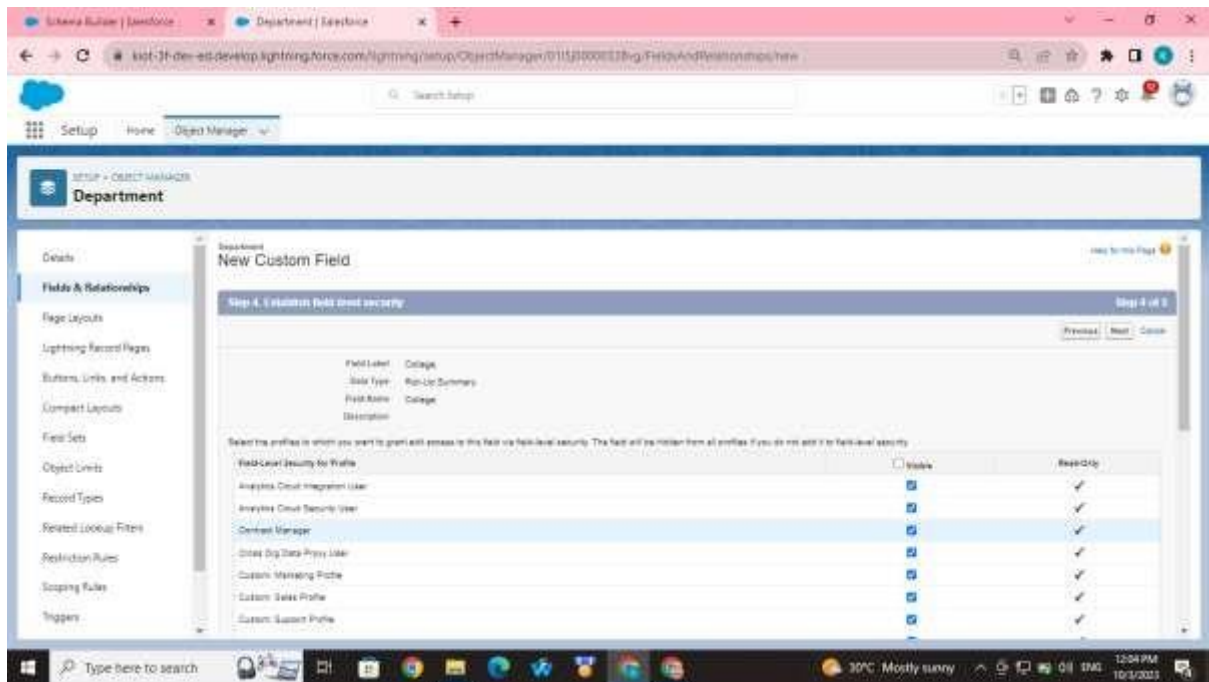
Step 2: Create a Master-Detail Relationship

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

1. Go to Setup > Object Manager.
2. Click on "College" 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."
7. Choose " Department " 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" to calculate the total number of related records in "Department":

1. Still on the "College" 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" 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.**

Schema Builder | Salesforce | Department | Salesforce

lightning.force.com/lightning/setup/ObjectManager/01153000128hg/FieldsAndRelationships/view

Setup Home Object Manager

Department

Details

Fields & Relationships
5 Items, Sorted by Field Label

Quick Find Add Deleted Fields Field Dependencies Set History Tracking

Field Label	Field Name	Data Type	Controlling Field	Indexed
College	College__c	Roll-Up Summary (COUNT College)		
Created By	CreatedBy	LookupUser		
Department Name	Name	Text(255)		
Last Modified By	LastModifiedBy	LookupUser		
Owner	OwnerId	LookupUserGroup		

Type here to search

Schema Builder | Salesforce | Tabs | Salesforce

lightning.force.com/lightning/setup/CustomTab/page?address=742Farkp%2Fp%2FNewCustomTabWizard.jsp%2FnetURL%2F%251...

Setup Home Object Manager

Tabs

New Custom Object Tab

Step 1: Enter the Details Step 1 of 2

Choose the option object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object type](#)

Object: **book**

Tab Style: **Standard**

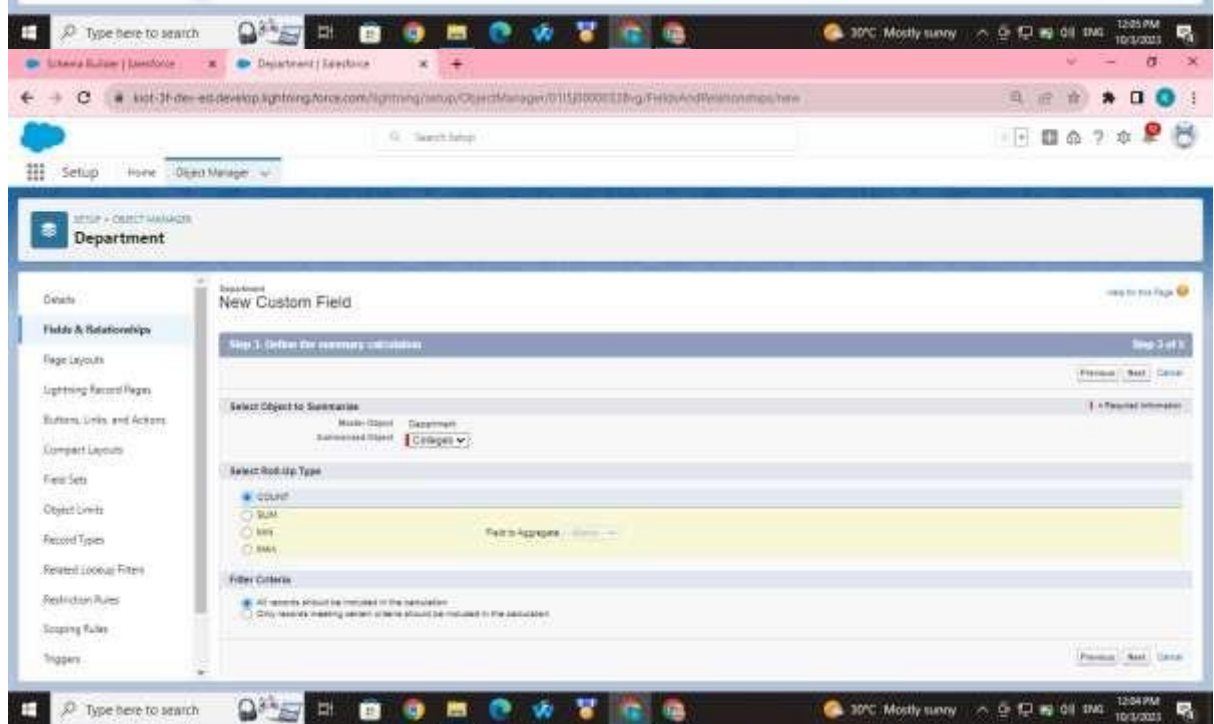
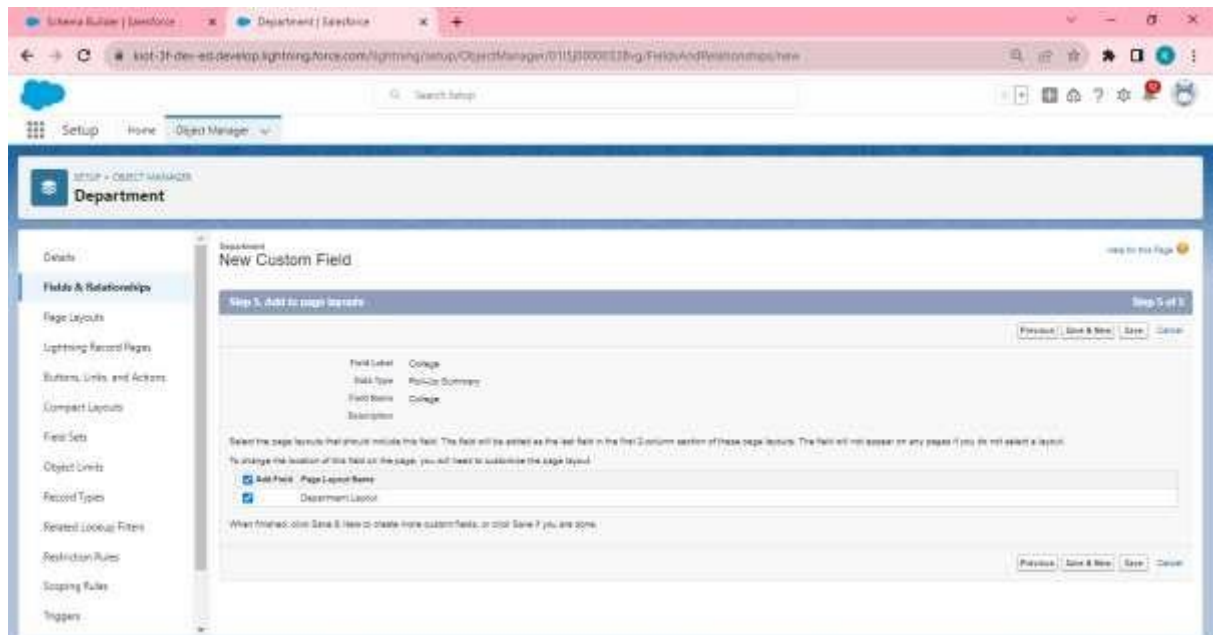
(Optional) Choose a Home Page Custom Link to show as a special page the first time you users visit on this tab.

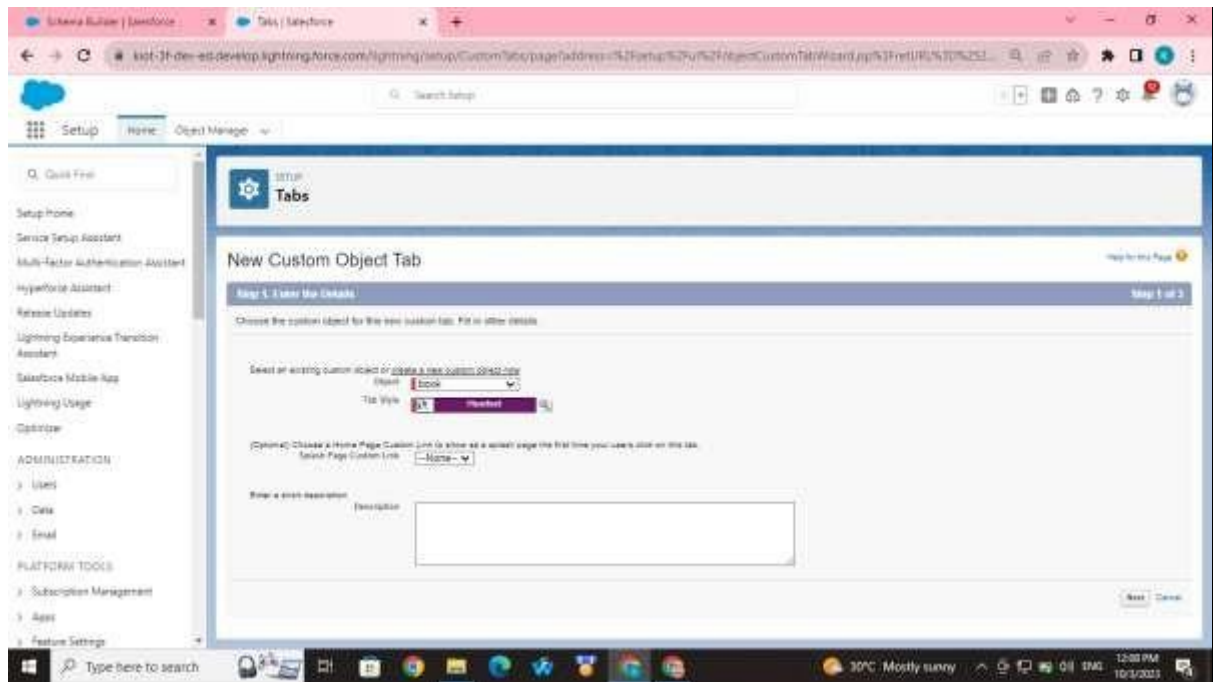
Source Page Custom Link: **None**

Enter a short description

Description:

Next Cancel





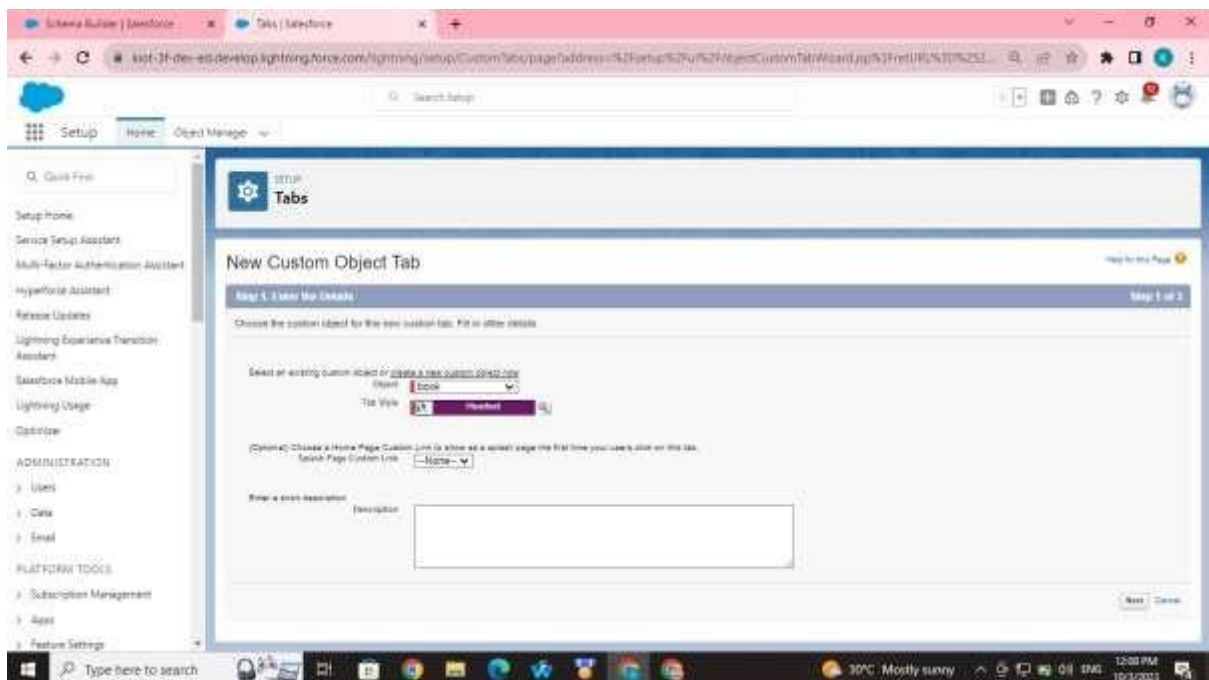
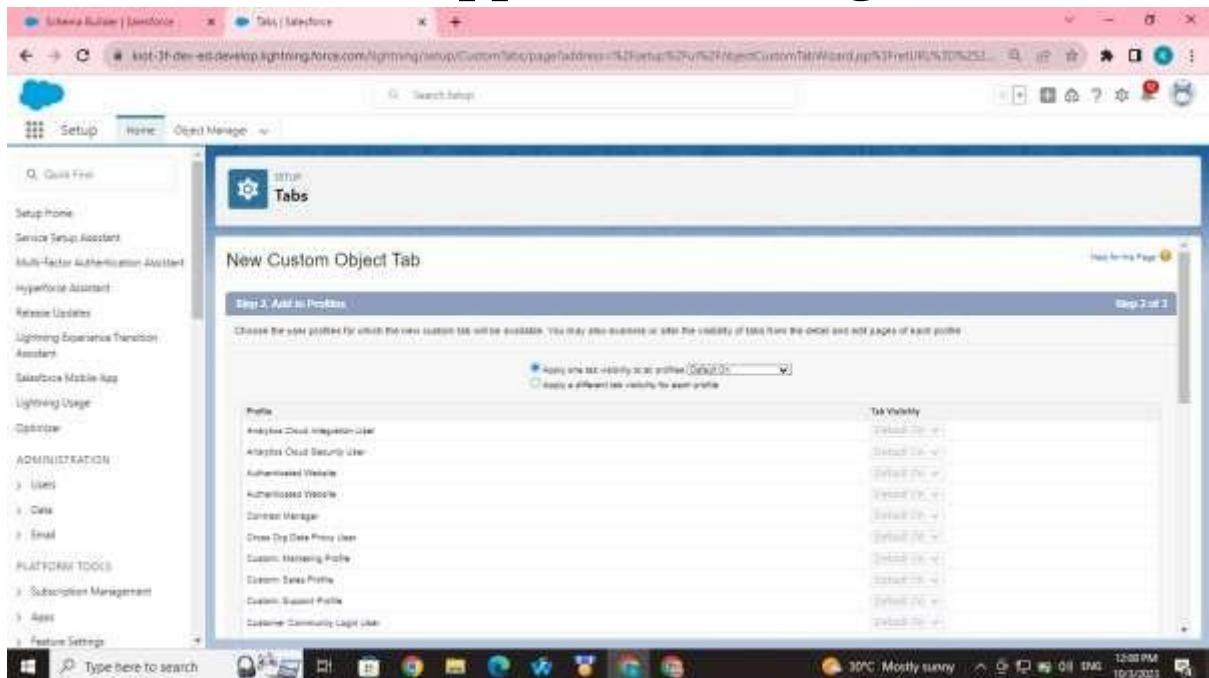
Step 4: Create a Lightning App

- 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.



Setup | Home | Object Manager

Setup

Step 3: Add to Custom Apps

Choose the custom apps for which the new custom tabs will be available. You may skip reviews or alter the visibility of tabs from the detail and edit pages of each Custom App.

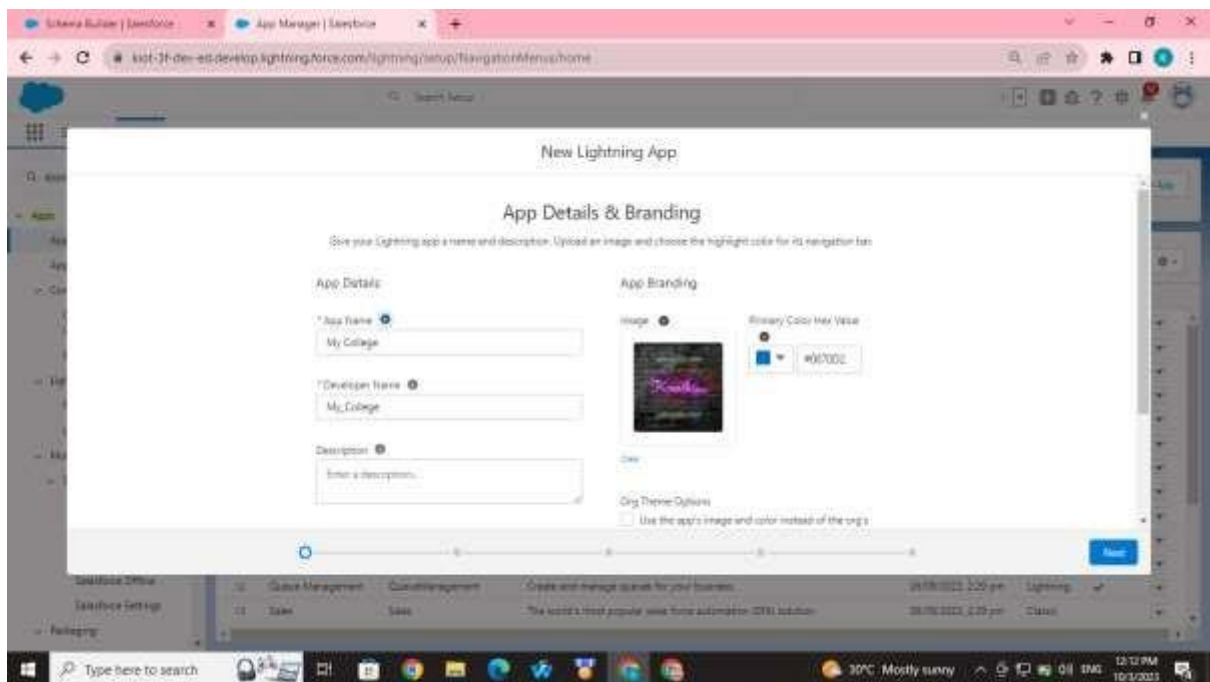
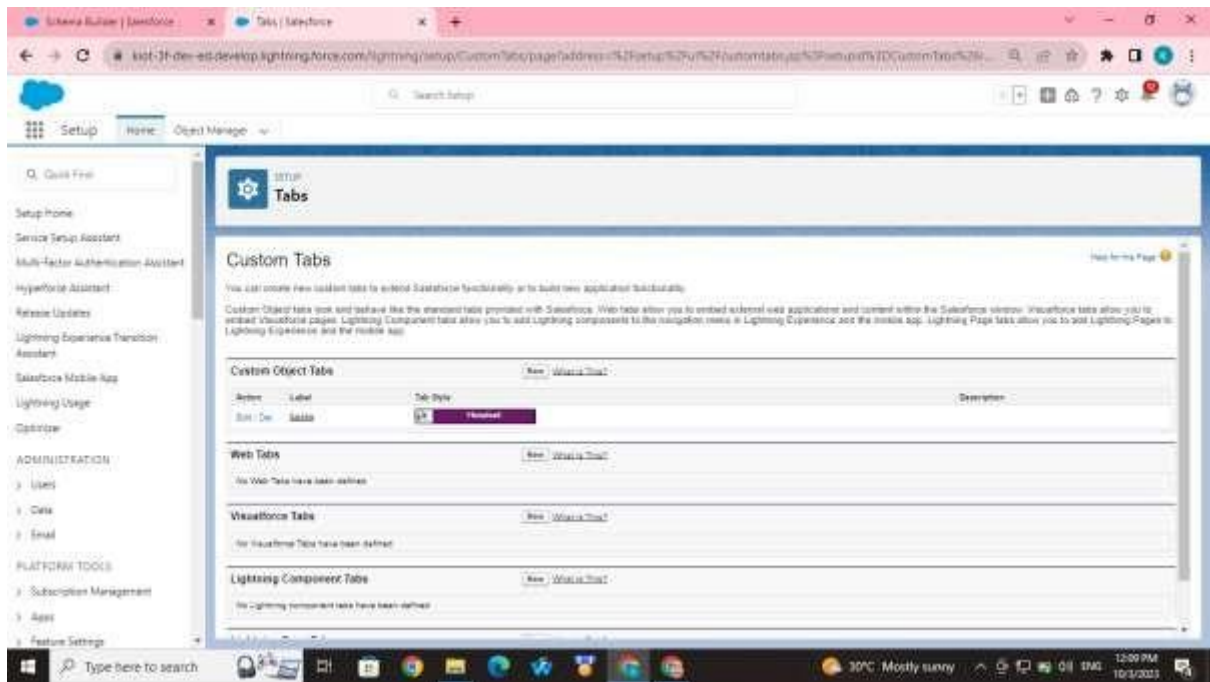
Custom App	Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Service Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Site)	<input checked="" type="checkbox"/>
Realtime Chatbot (standard__Chatbot)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Analytics)	<input checked="" type="checkbox"/>
Flow Console (standard__FlowConsole)	<input checked="" type="checkbox"/>

Setup | Home | Object Manager

Lightning Experience App Manager

21 items • Sorted by App Name • Filtered by All app categories • Select Type

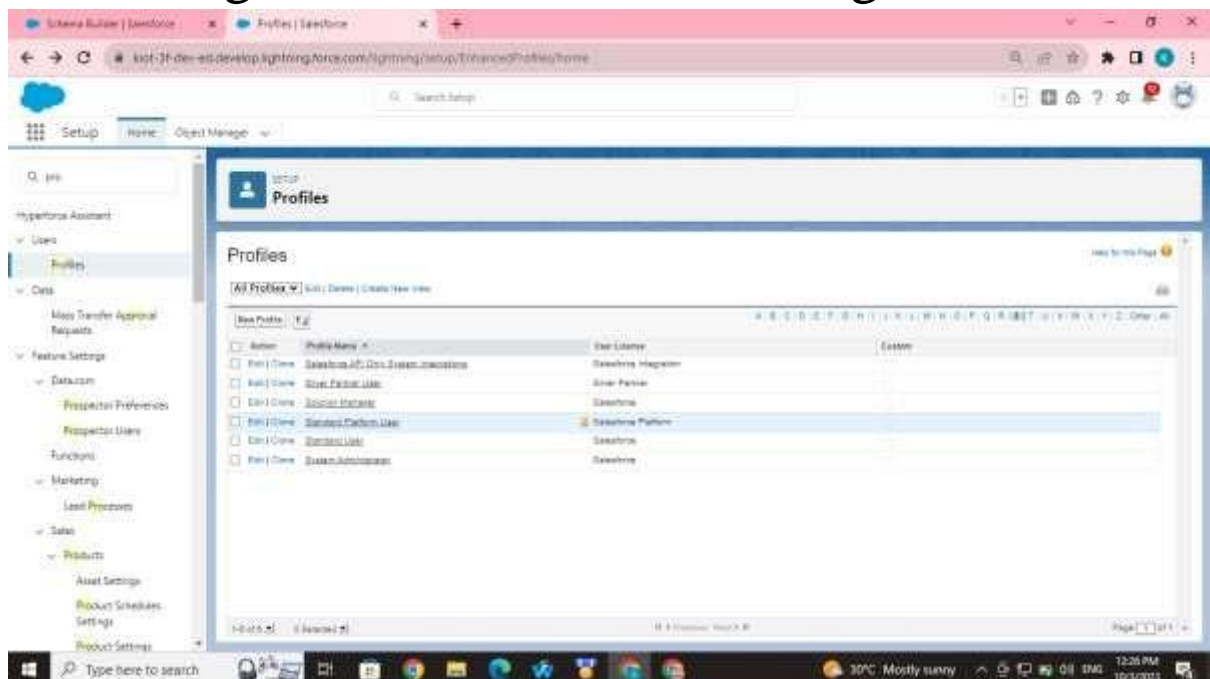
	App Name ↑	Developer Name	Description	Last Modified D...	App T...	Vis...
1	Ad Data	AdTailor		28/09/2023, 2:29 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	28/09/2023, 2:29 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tab	25/09/2023, 2:29 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	28/09/2023, 2:52 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	28/09/2023, 2:29 pm	Classic	✓
6	Content	Content	Salesforce CRM Content	28/09/2023, 2:29 pm	Classic	✓
7	Data Manager	DataManager	Use Data Manager to view, filter, monitor usage, and manage records	25/09/2023, 2:29 pm	Lightning	✓
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites	28/09/2023, 2:29 pm	Lightning	✓
9	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	28/09/2023, 2:29 pm	Lightning	✓
10	Marketing	Marketing	Best-in-class on-demand marketing automation	28/09/2023, 2:29 pm	Classic	✓
11	Platform	Platform	The fundamental Lightning Platform	25/09/2023, 2:29 pm	Classic	✓
12	Queue Management	QueueManagement	Create and manage queues for your business	28/09/2023, 2:29 pm	Lightning	✓
13	Sales	Sales	The world's most popular sales force automation (SFA) solution	28/09/2023, 2:29 pm	Classic	✓

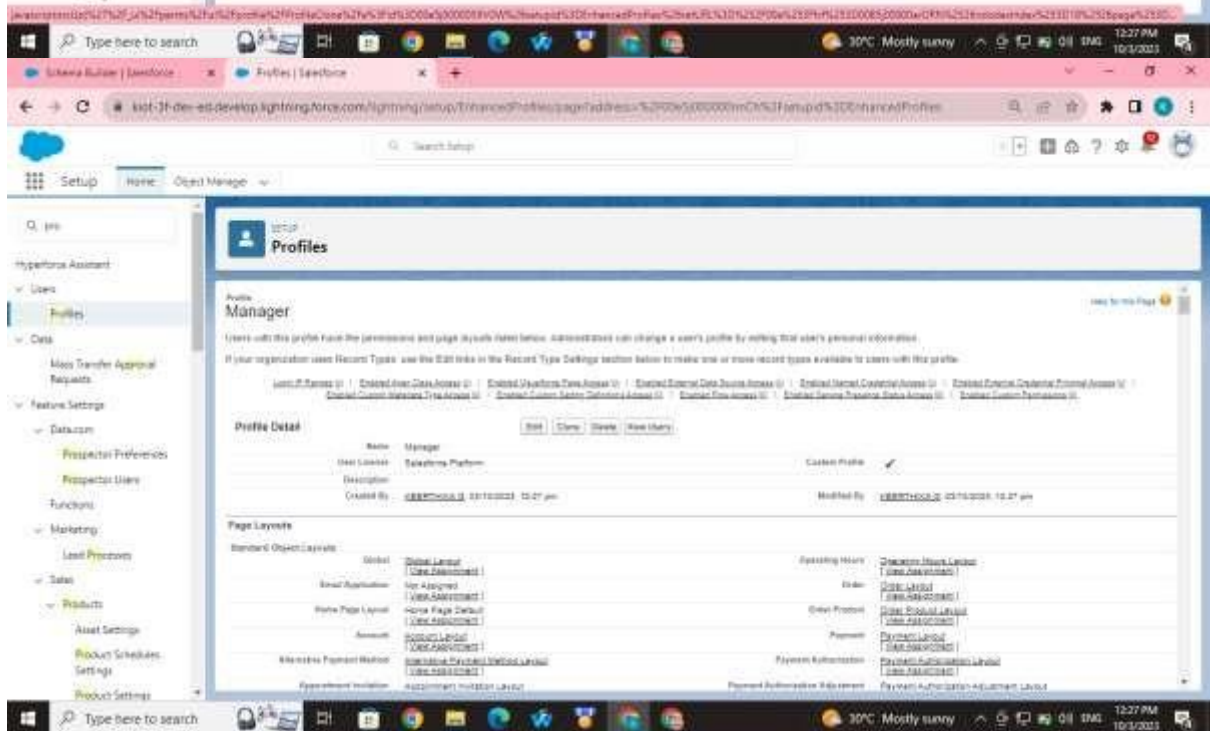
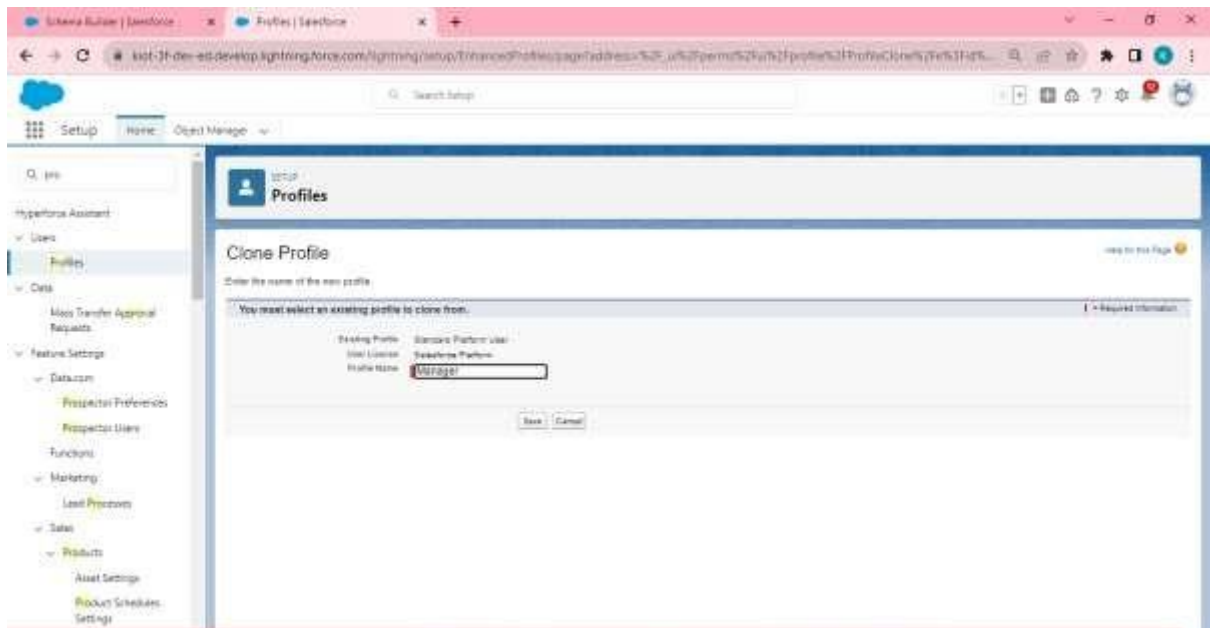


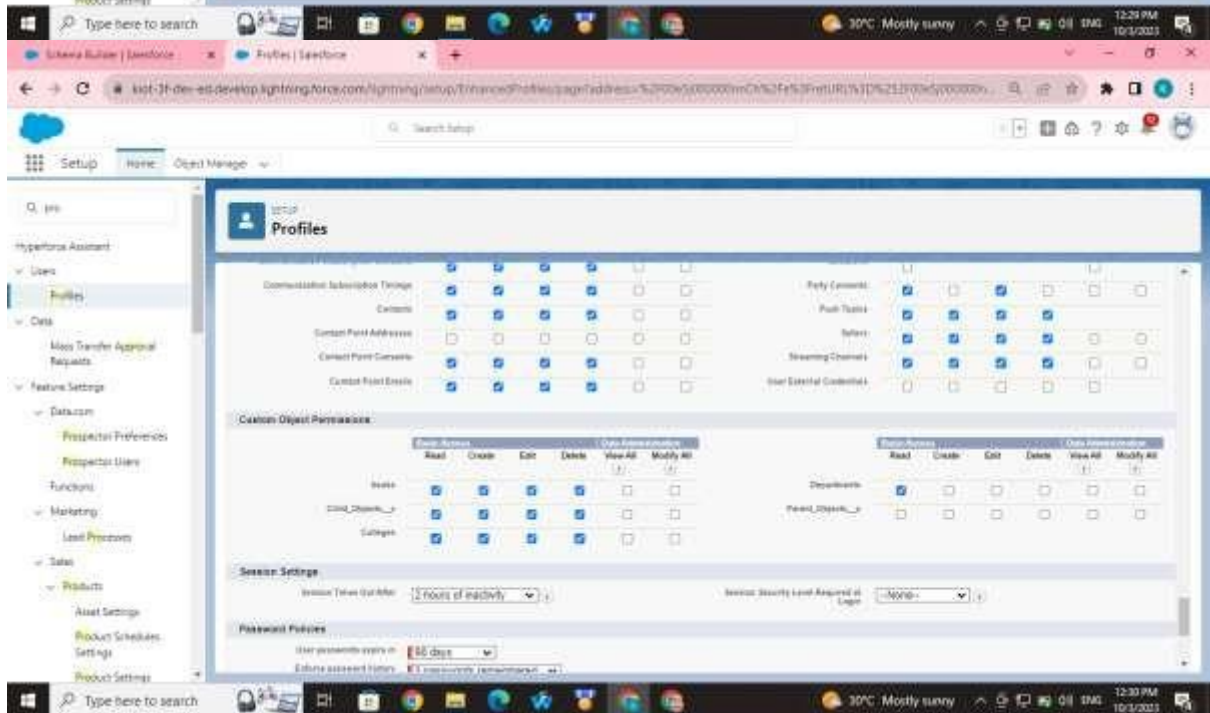
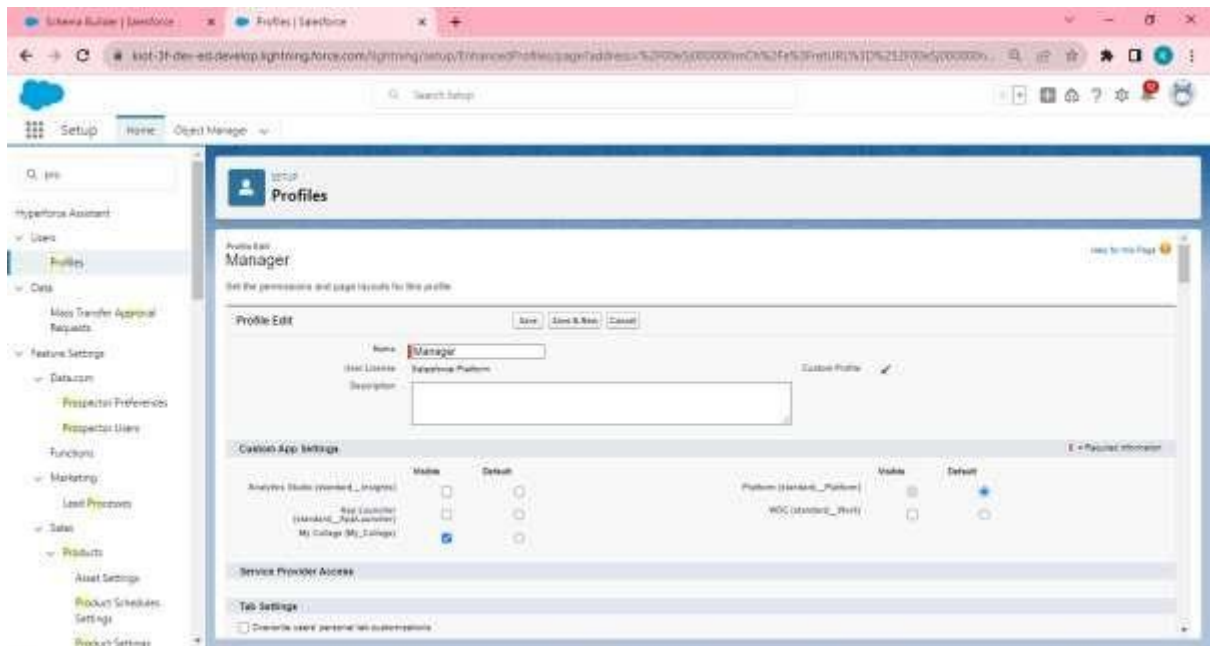
2. If there is 2 user, User A and User B in the organisation and we want in Account object that User A should not see the User B Record and user B should not see User A record then apply the Security for the users.

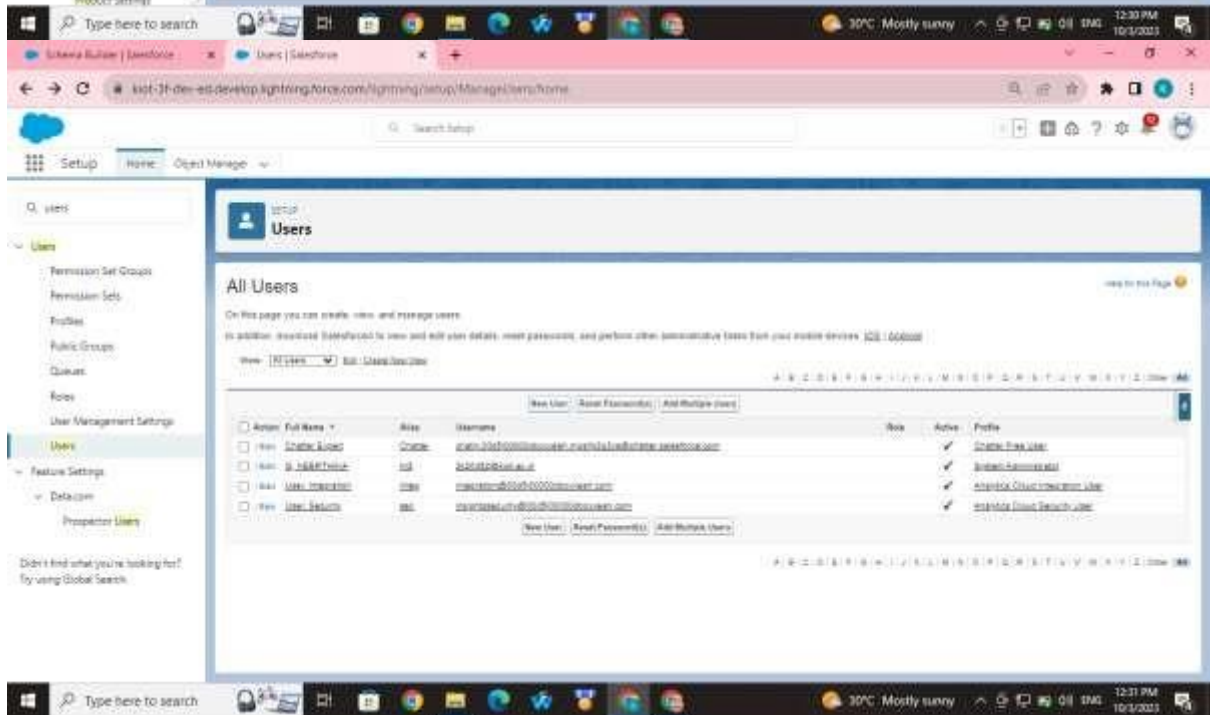
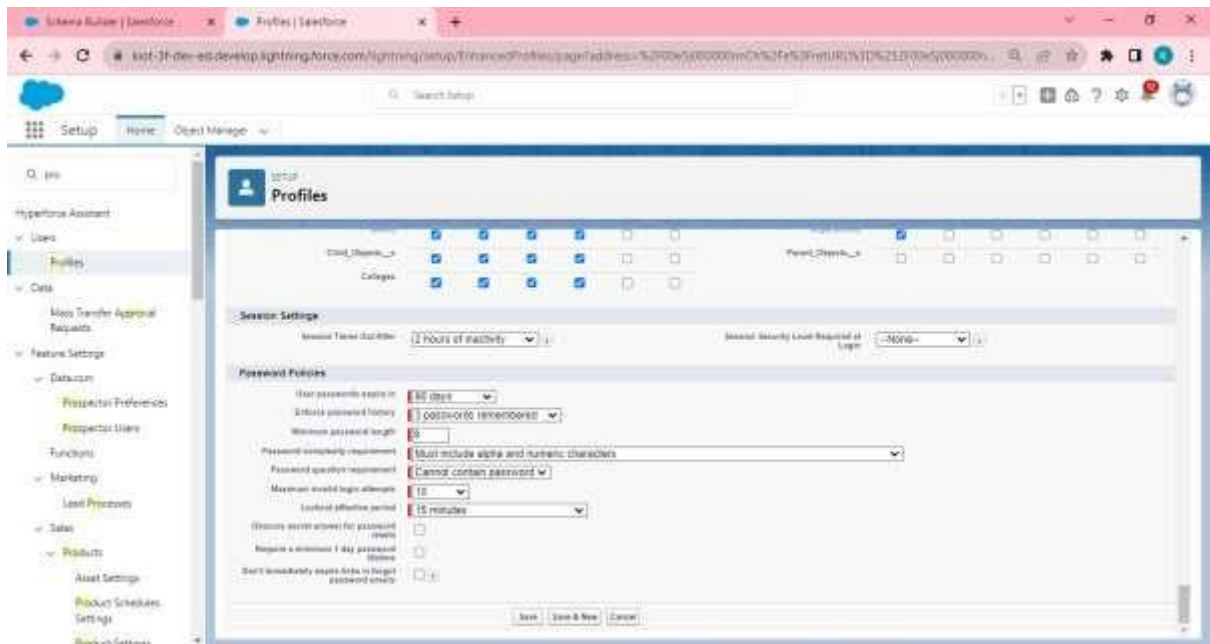
Solution:

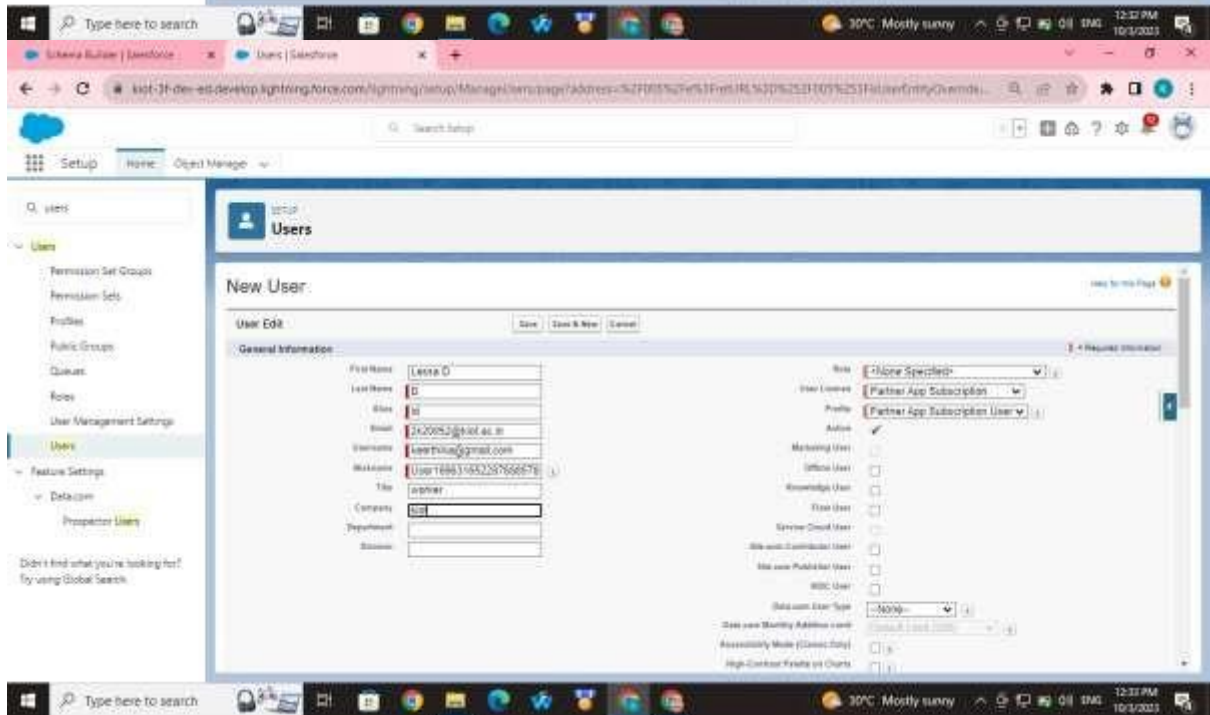
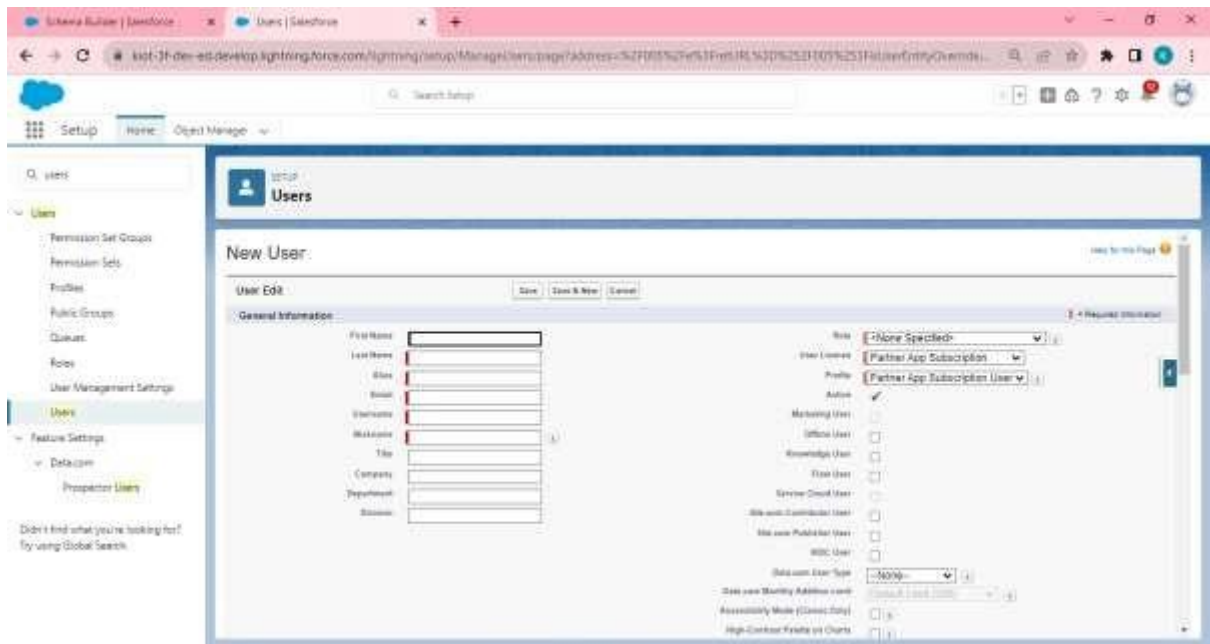
Step 1: Create two separate custom profiles, one for Manager and one for sales manager.











Change Your Password

Enter a new password for **keerthi@klor.ac.in**. Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password:

* Confirm New Password:

Security Question:

What is your pet's name?

* Answer:

[Change Password](#)

Password was last changed on 03/10/2023, 12:42 pm.

salesforce

Username:

Password:

[Log In](#)

☒ Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)


[Risk a customer?](#) [Try for Free](#)

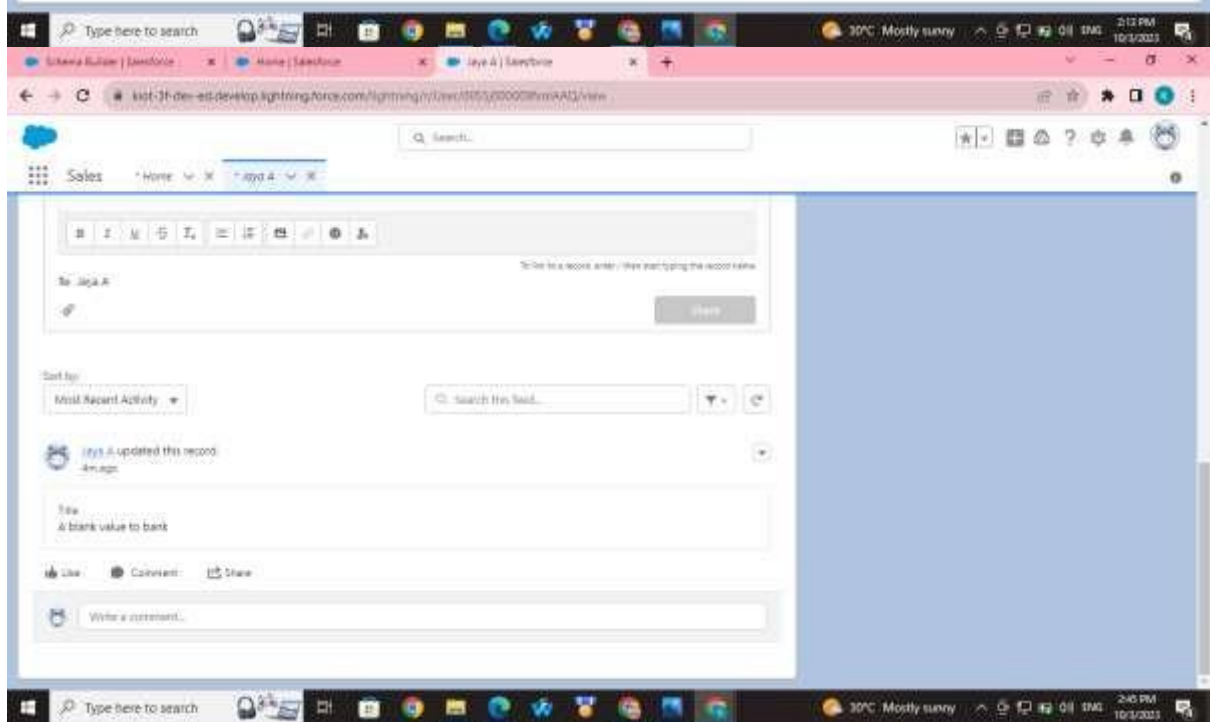
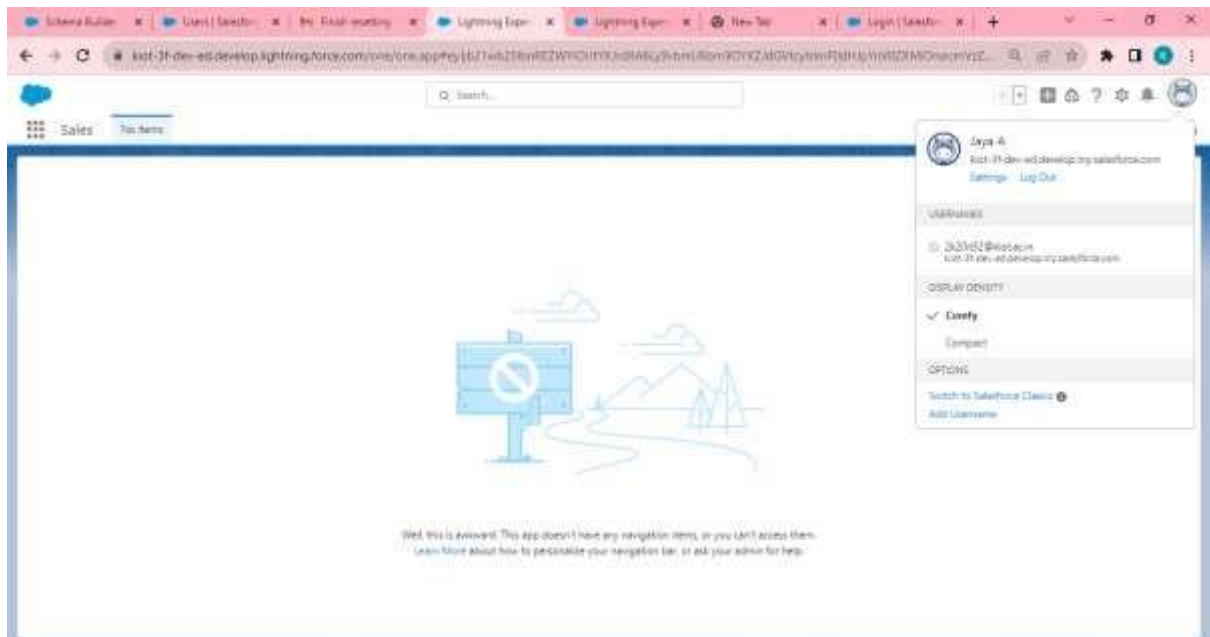
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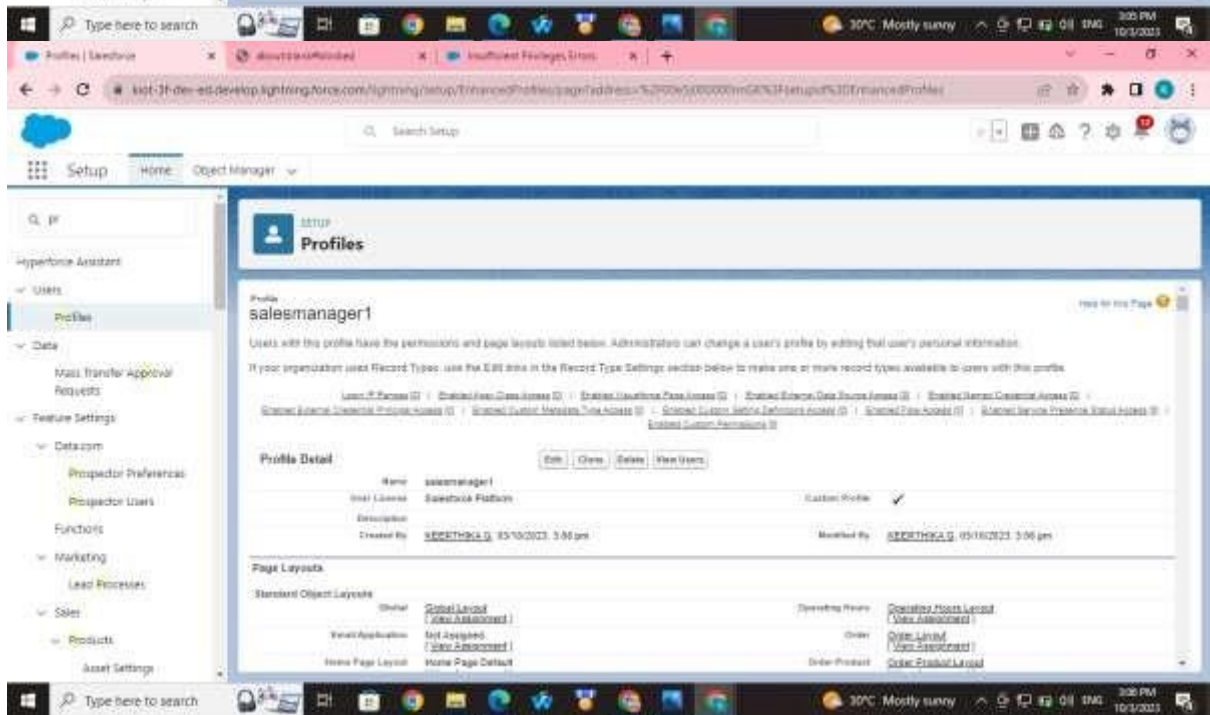
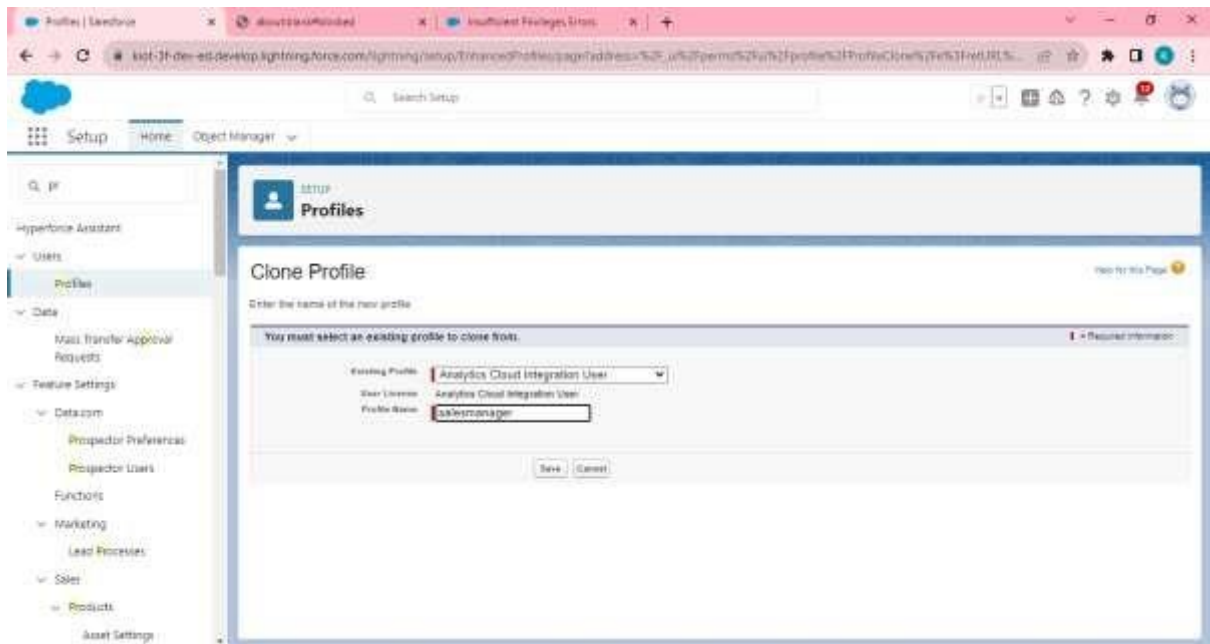
Scale service with Generative AI and Einstein GPT.

Learn how AI and Einstein GPT are bringing intelligence and efficiency to service

[WATCH ON-DEMAND WEBINAR](#)







Profiles | Salesforce

Search Setup

Setup Home Object Manager

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Profiles

Profile Pick

salesmanager1

Get the permissions and page layouts for this profile.

Profile Edit

Name: salesmanager1

User License: Salesforce Platform

Custom Profile: ☒

Description:

Custom App Settings

Visible	Default
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>

Platform Standard__Platform

WDC (Standard__Work)

Service Provider Access

Profiles | Salesforce

Search Setup

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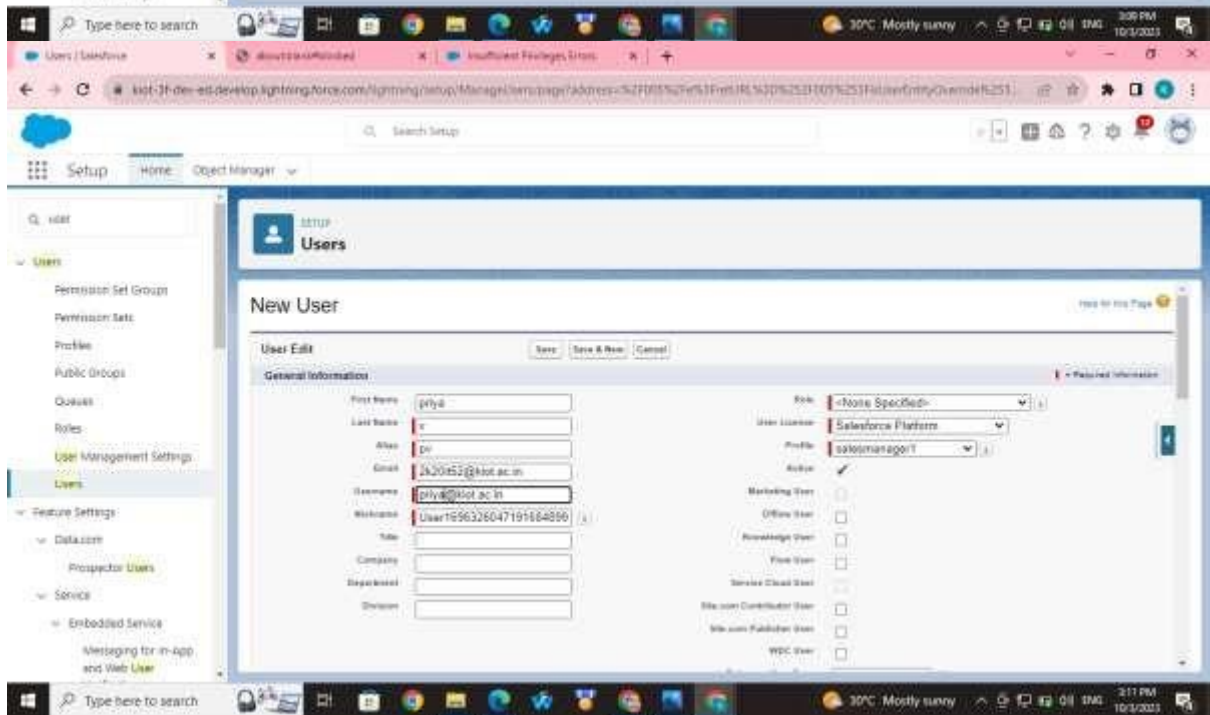
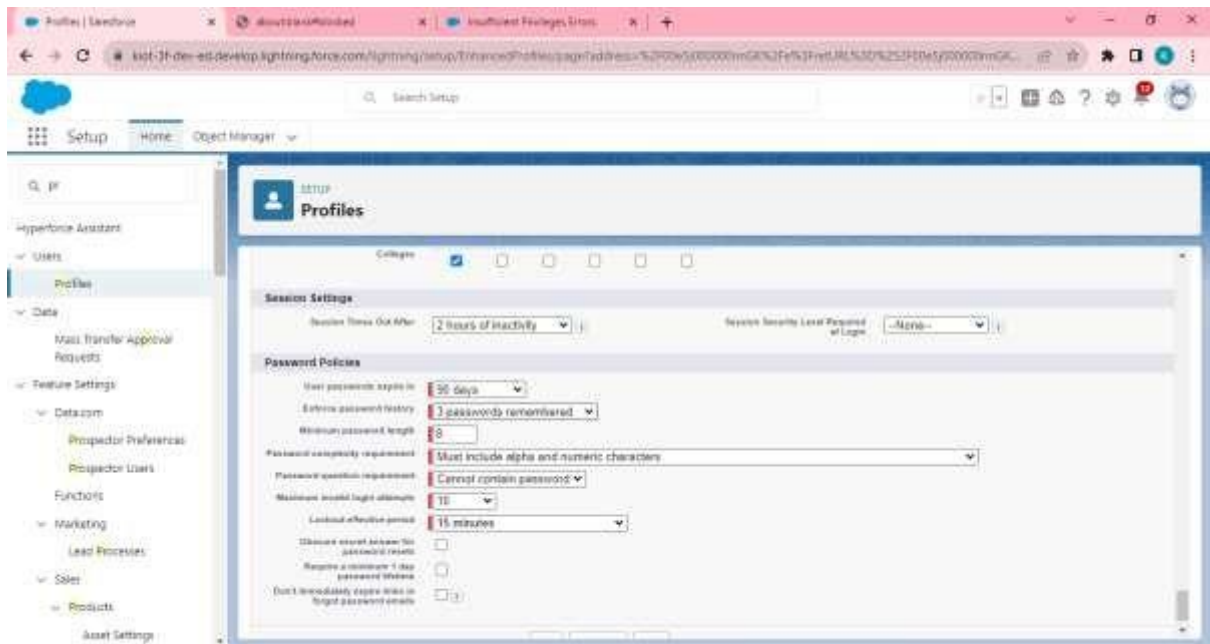
Custom Object Permissions

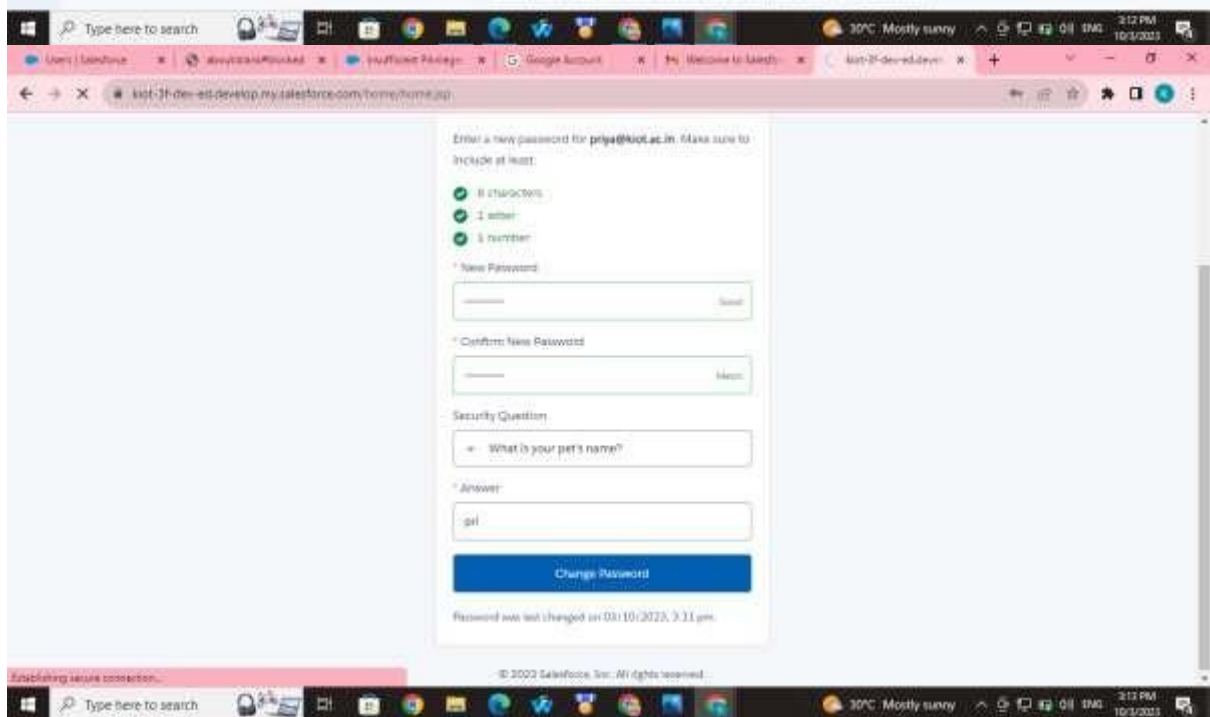
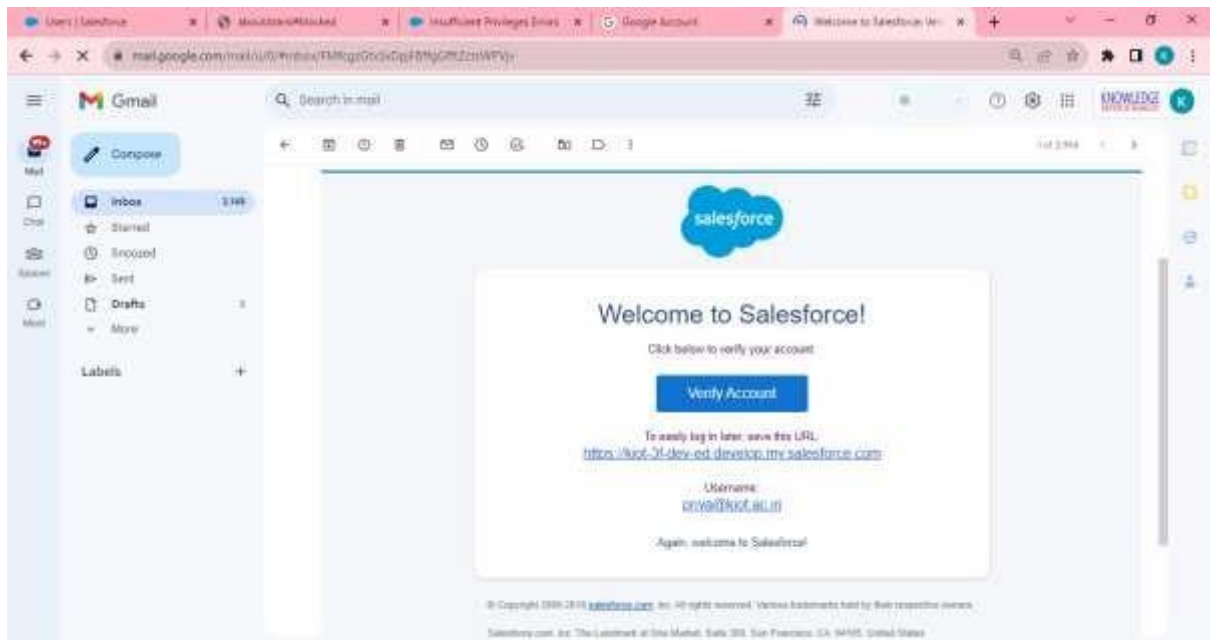
Read	Create	Edit	Delete	View All	Modify All
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>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

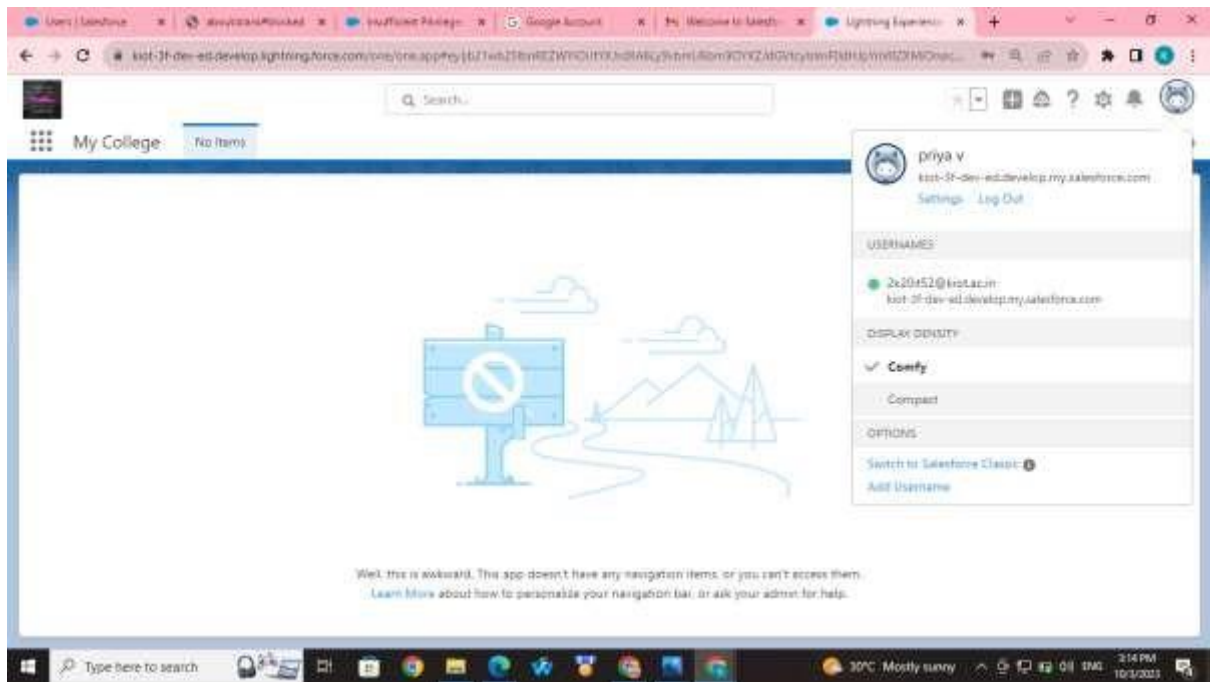
Session Settings

Session Times Out After: 2 hours of inactivity

Password Policies







Step 2:

Permission Sets:

- Create two permission sets, one for manager and one for sales manager.

Object-Level Security:

- In each profile and permission set, set the objectlevel security for the Account object to "Read" to ensure that both I-manager and I- sales manager can view Account records. Record-Level Security:

Security:

- Implement record-level security using CriteriaBased Sharing Rules.

- Create a sharing rule that shares Account records owned by manager with manager and records owned by sales manager with sales manager.
- For the sharing rule criteria, specify that records owned by manager are shared with user A, and records owned by sales manager are shared with sales manager. Ownership:
- Ensure that the Account records are owned by the respective users, with manager owning their records and sales manager owning their records.

Organization-Wide Defaults:

- Set the organization-wide defaults for the Account object to "Private" to ensure that records are private by default.

Testing:

- Test the setup by logging in as manager and sales manager separately to verify that they cannot access each other's records.

Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Permission Sets

On this page you can create, view, and manage permission sets. In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play. iOS | Android

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Service	Allows access to the store. Lets users see product.	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities and allows access t.	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice cont	Service Cloud Voice User

1-25 of 25 0 Selected 4 Previous Next Page 1 of 2

Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

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per

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Permission Sets

Create

Enter permission set information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set.

Who will use this permission set?

Choose "None" if you plan to assign this permission set to multiple users with different user and permission set licenses.

Permission Sets | Salesforce | Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Slack

MuleSoft

Exchange

SETUP

Permission Sets

Permission Set: salesmanager1

Find Settings | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview | Select Settings | books

books

Edit

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/> (3)

Object Permissions

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Transfer	<input type="checkbox"/>

Type here to search

Permission Sets | Salesforce | Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

Search Setup

Setup Home Object Manager

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Slack

MuleSoft

Exchange

SETUP

Permission Sets

Available

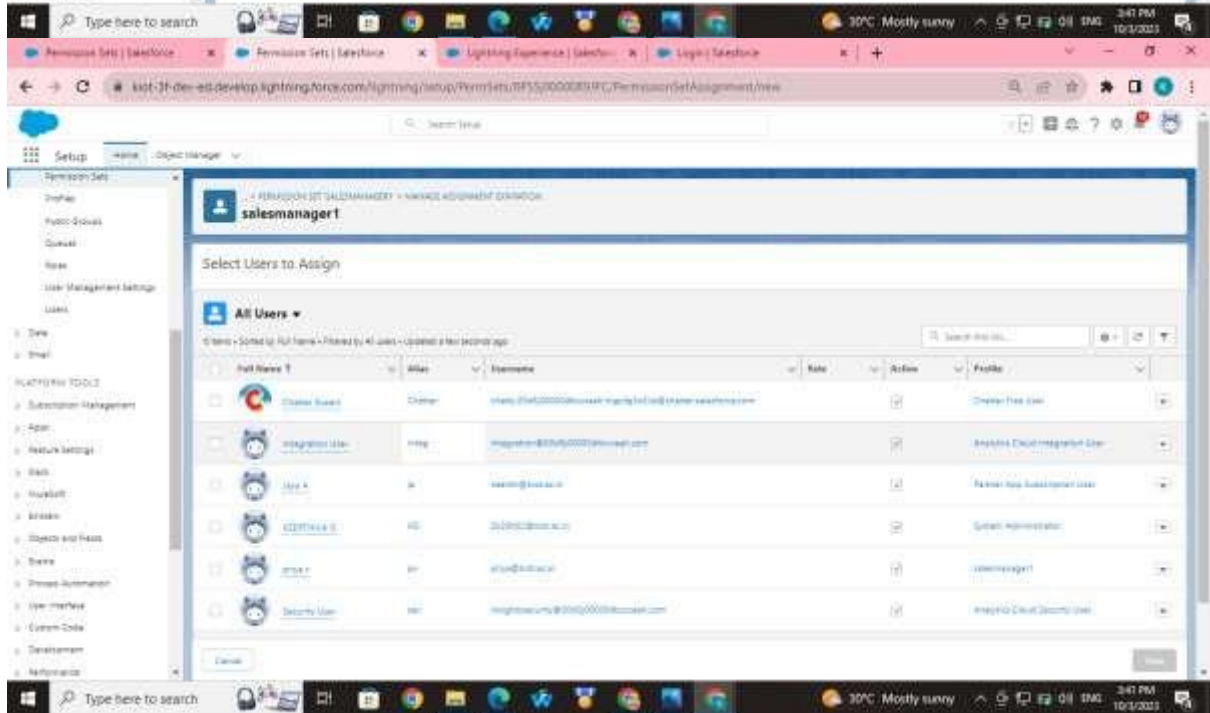
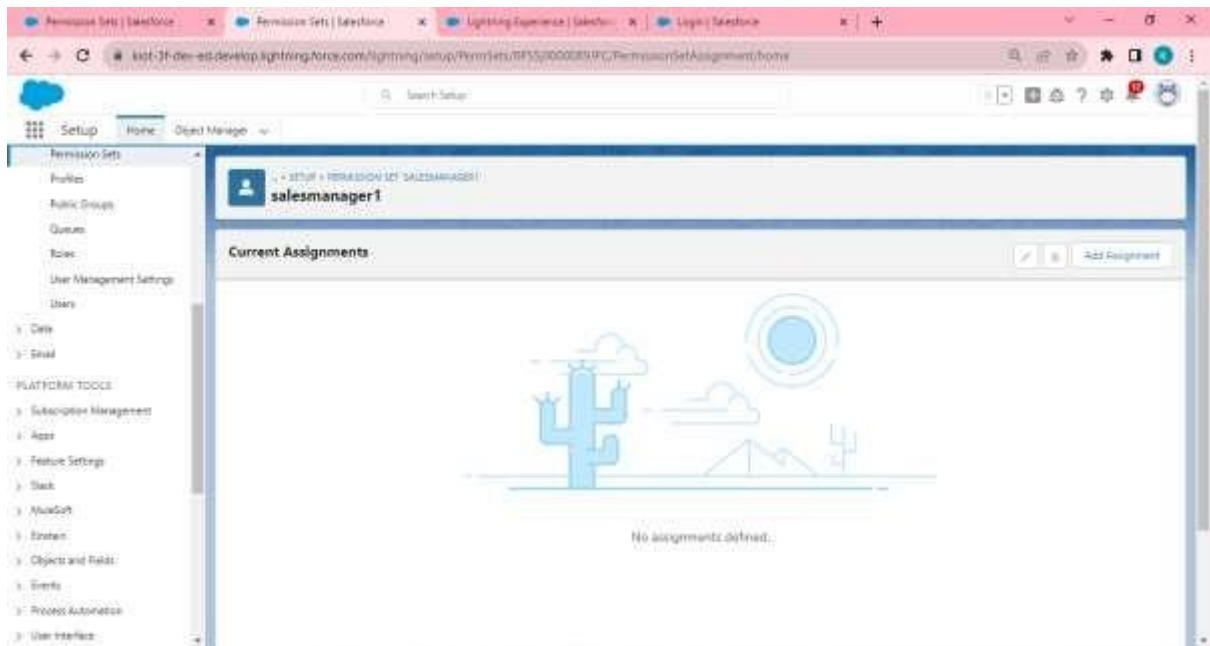
Available	Visible
<input type="checkbox"/>	<input type="checkbox"/> (3)

Object Permissions

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

Field Permissions

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



Permission Sets | Salesforce | Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

ksf-3f-dev-ed.develop.lightning.force.com/lightning/setup/Permissions/0F5520000891FC/PermissionSetAssigned/new

Setup Home Object Manager

Permission Sets

- Profile
- Public Groups
- Custom
- Role
- User Management Settings
- Users

Tools

- Time
- Email
- Health Check Tools
- Subscription Management
- App
- Network Settings
- Batch
- Workflow
- Knowledge
- Object and Field
- Event
- Process Automation
- User Interface
- Custom Code
- Development
- Performance

Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date

Time Zone

Select a time zone

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
admin		adminmanager1	✓	Salesforce Platform	Never Expires

Cancel Assign

Permission Sets | Salesforce | Permission Sets | Salesforce | Lightning Experience | Salesforce | Login | Salesforce

ksf-3f-dev-ed.develop.lightning.force.com/one/one.app?y=6274b25b6622WYQaZAR5dFw6GZndyba9wCRhcgpc2F32DN1bH1Q9W8wXPR...

Setup Home Object Manager

Permission Sets

- Profile
- Public Groups
- Custom
- Role
- User Management Settings
- Users

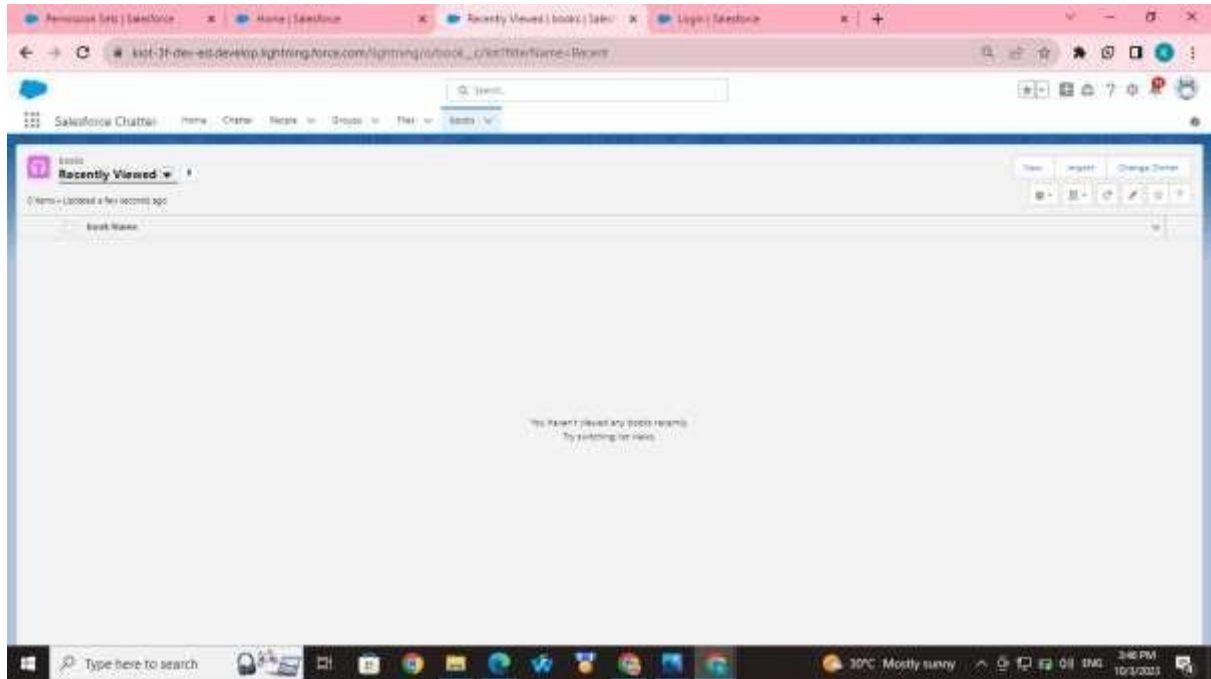
Tools

- Time
- Email
- Health Check Tools
- Subscription Management
- App
- Network Settings
- Batch
- Workflow
- Knowledge
- Object and Field
- Event
- Process Automation
- User Interface
- Custom Code
- Development
- Performance

Assignment Summary

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

Done

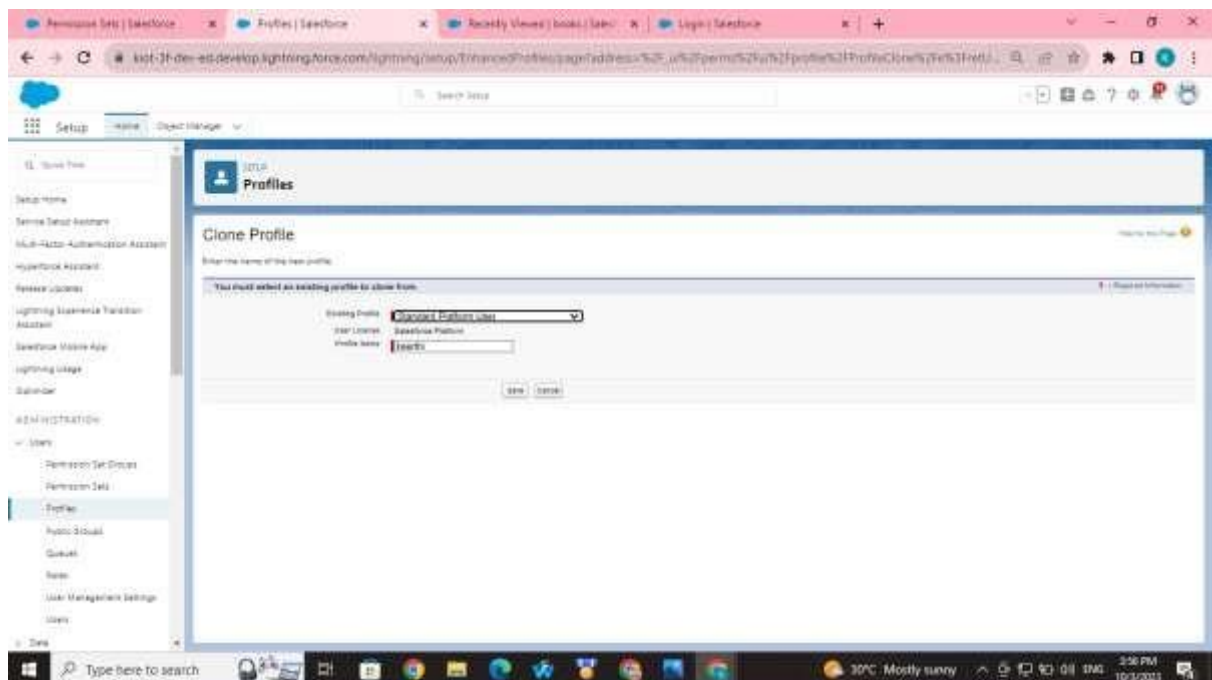
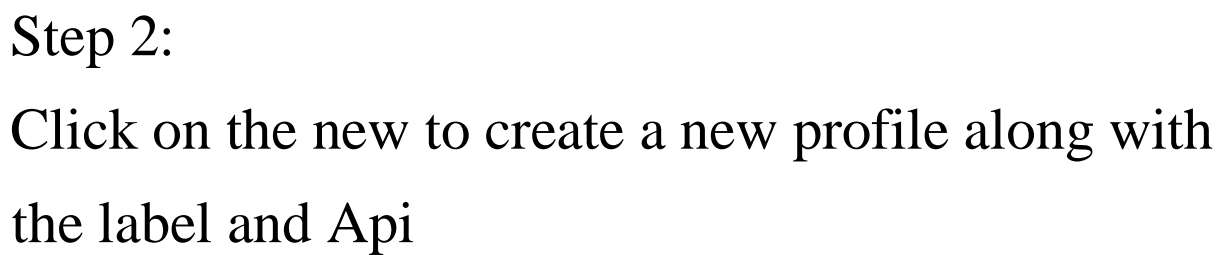


3. Suppose there are 2 Users and they are having Create, Read, Edit access on Account Object with the same profile but we want to open up the access for one user to delete how will you implement the Security setting.

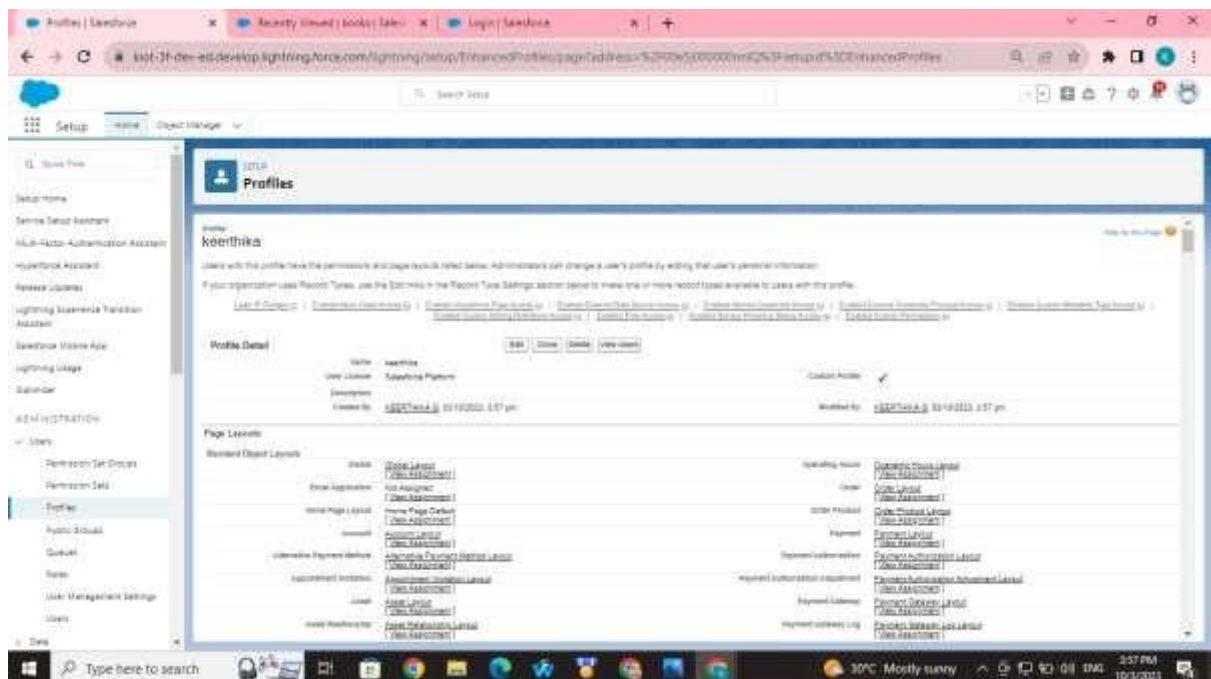
Solution:

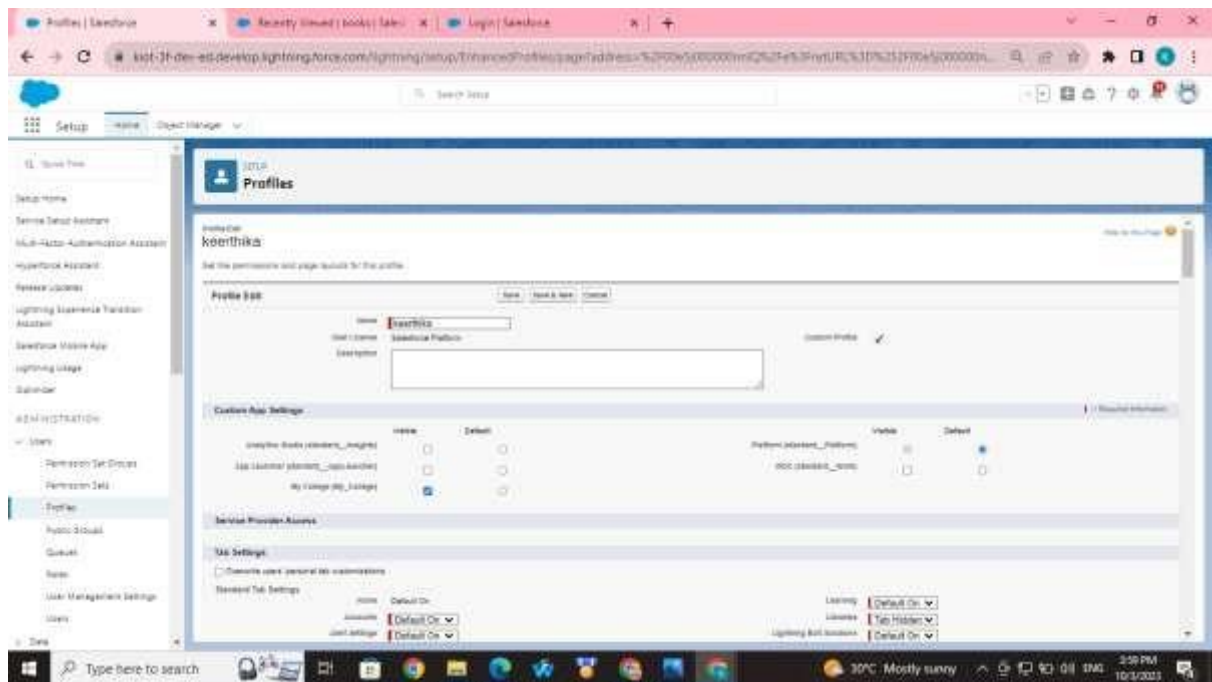
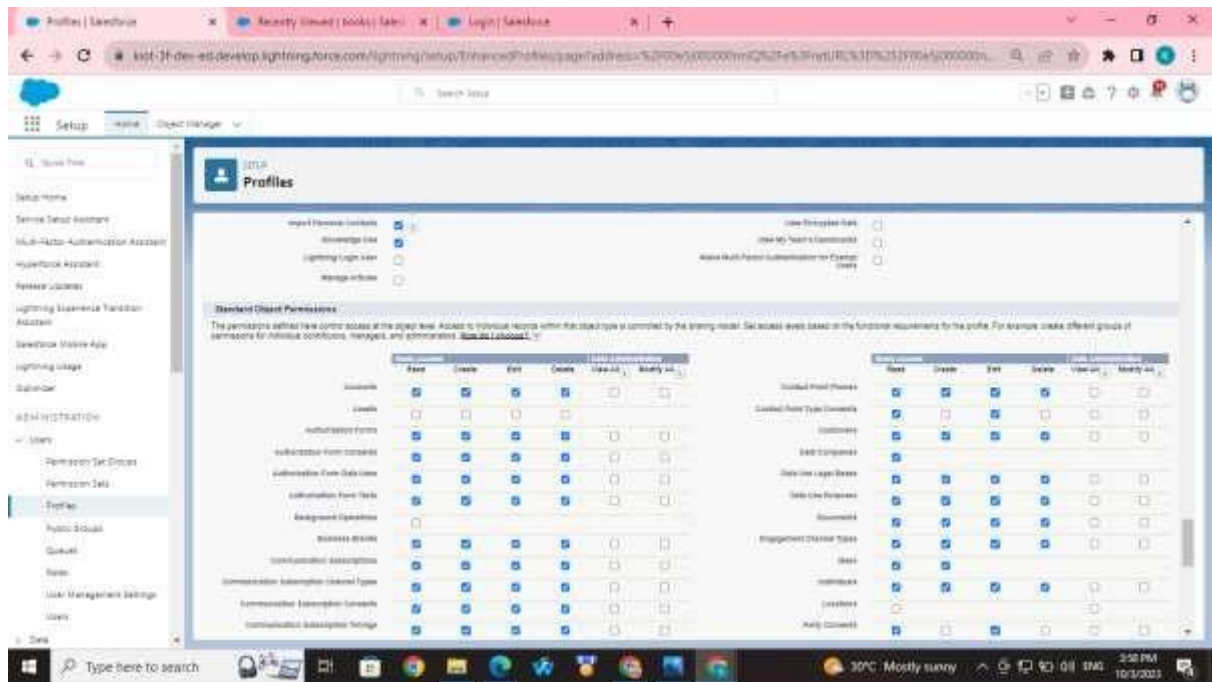
Step 1: we need create a profile for the two user which has the access to Create, Read, Edit for follow as per.

Setup-quick search[profile]



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.

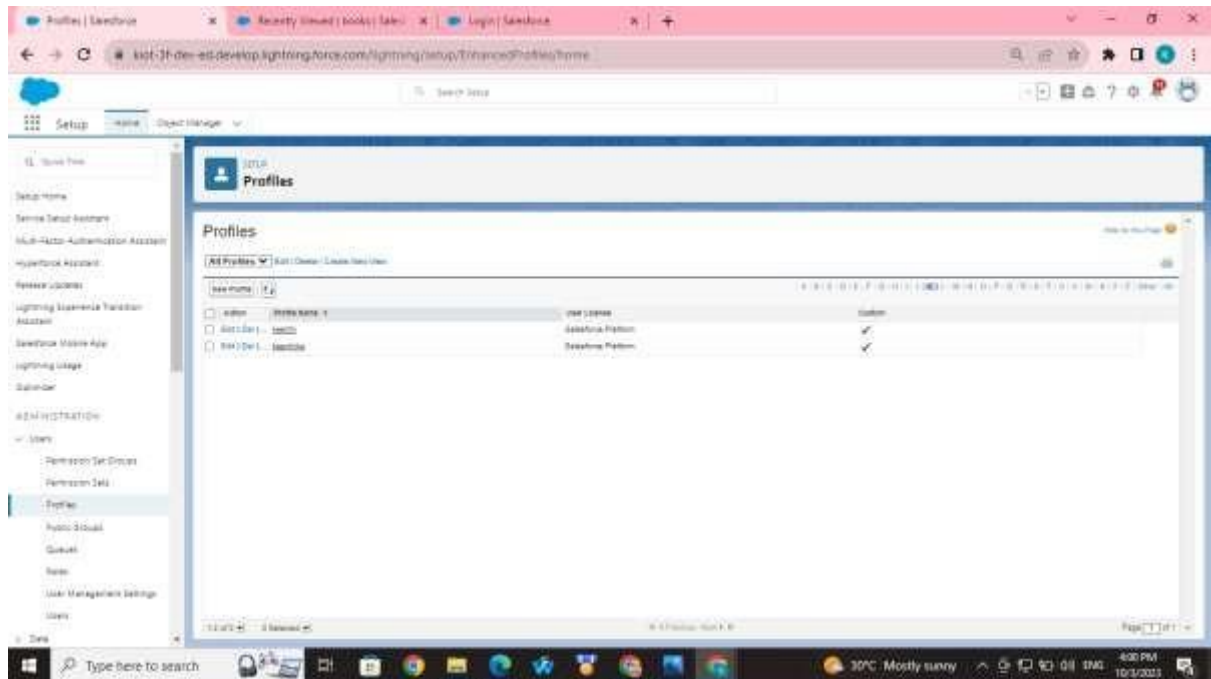




Step 4

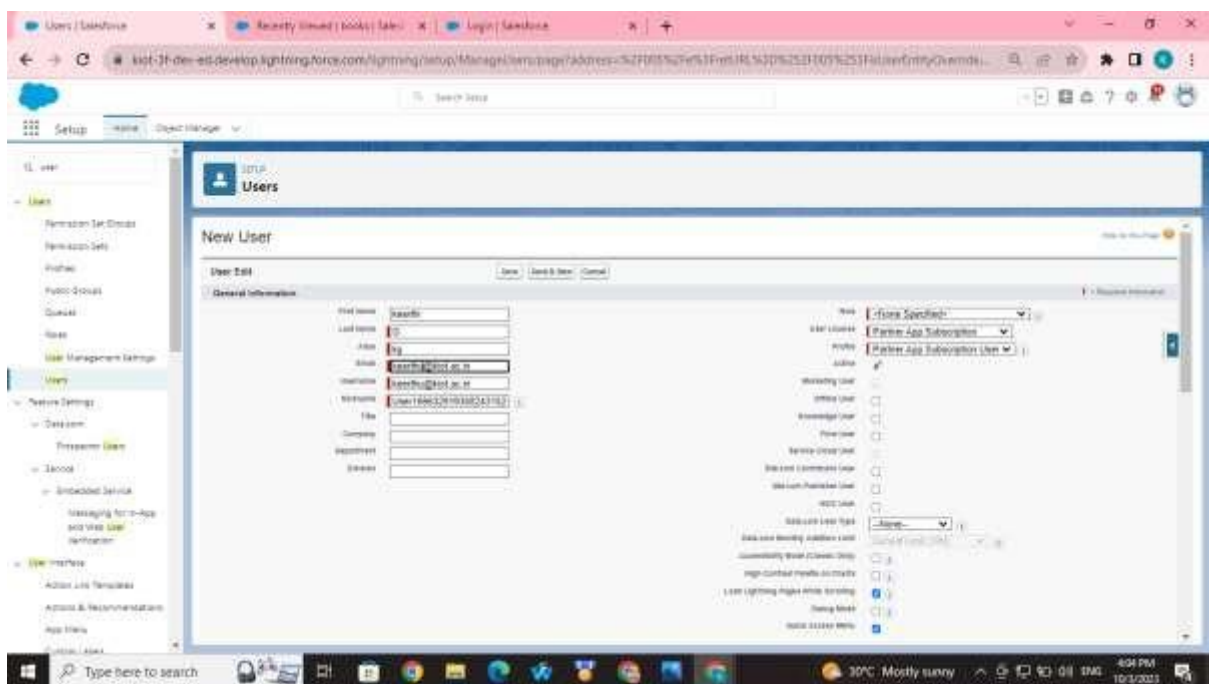
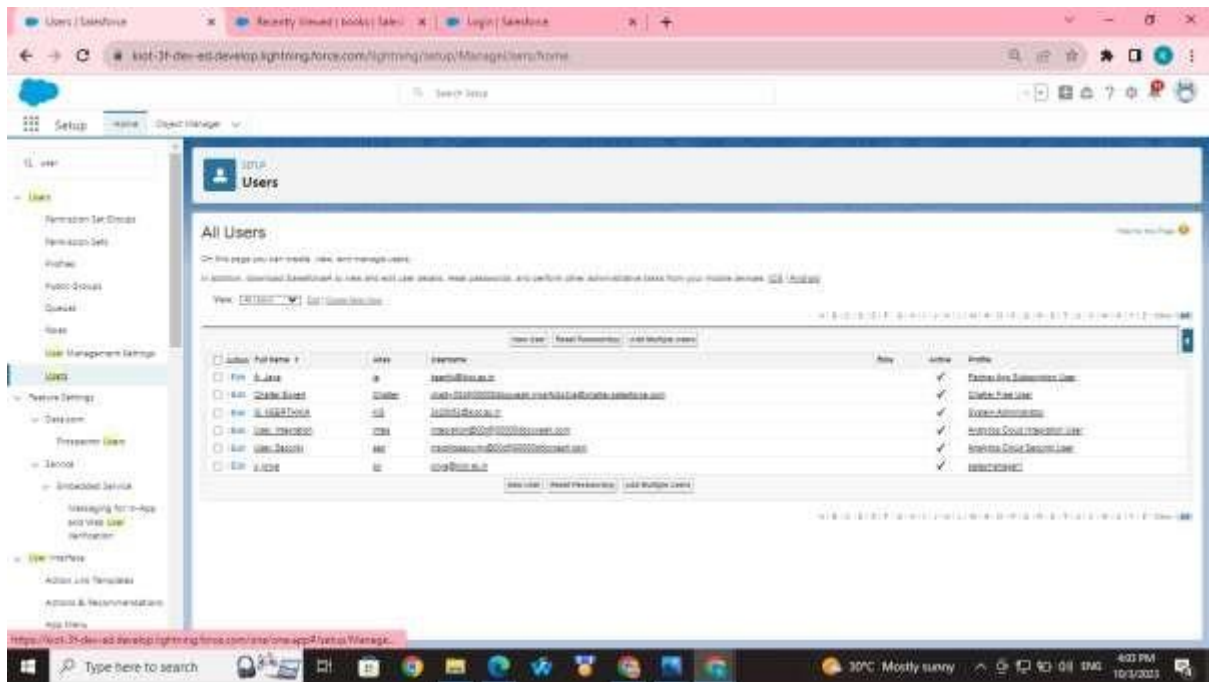
Now you can preview your created profile on the profile option here my profile name jaga has been

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 been created with alternate name but with the same user profile and once the two user are create click on save.

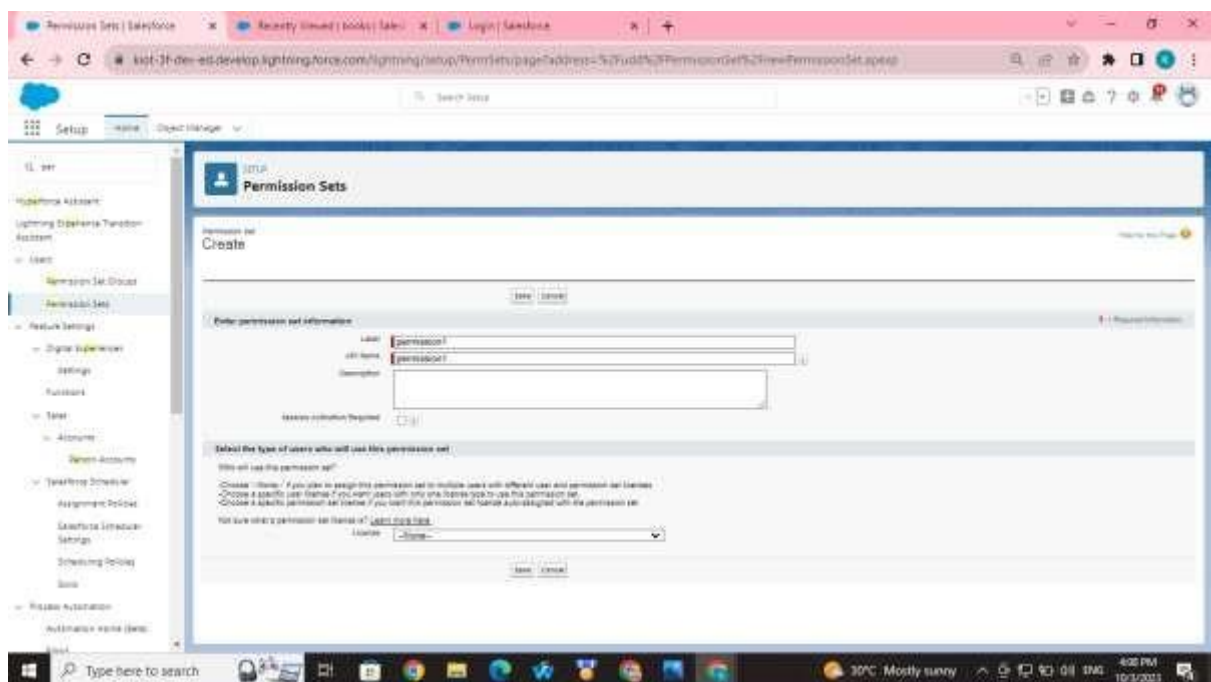


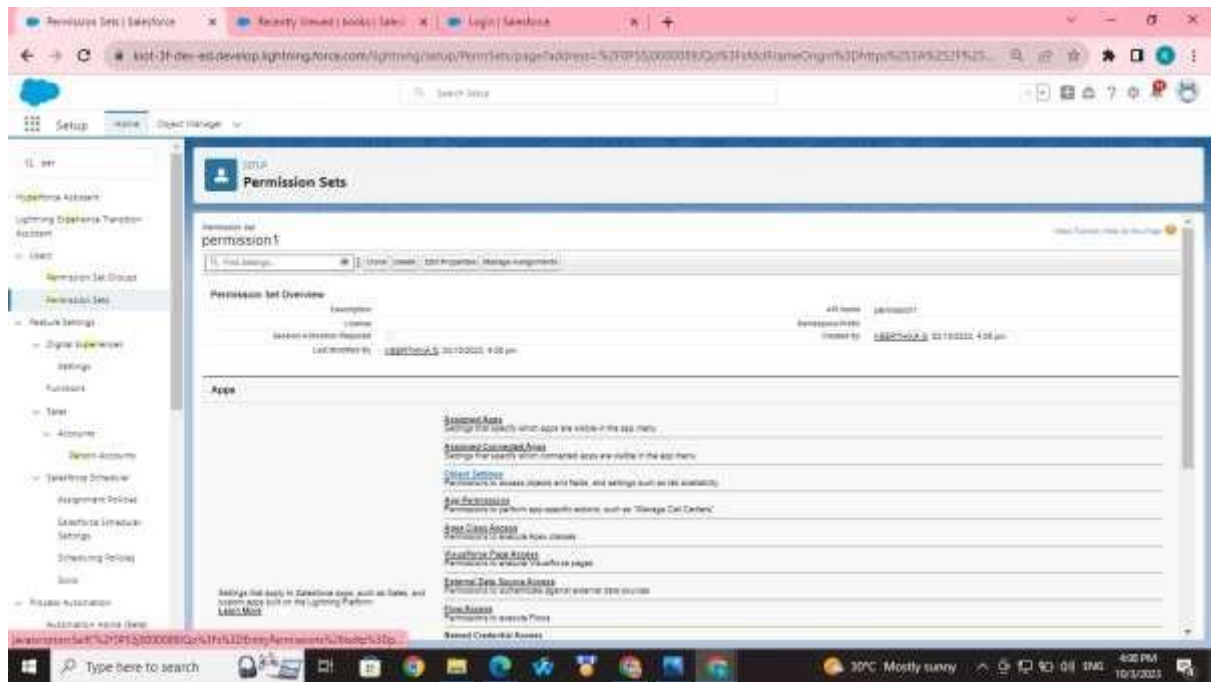
Now you can preview your two user that you have created in my side I had create the two users a Jagadesh11 and Jagadesh22 as a director channel sales with the marketing team.

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 saveobject 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.

Permission Sets | Salesforce | Security | Account | Login | Salesforce

https://test-3f-dev-ed.sfdc.my.salesforce.com/lightning/setup/permissionspage?address=570P5500001872j65H453D0myPermissions%26r53DAccount

Setup | Home | Object Manager | Search Setup

IL 3er

HubSpot Account

Lightning Experience Transition Assistant

Users

Permission Set Group

Permission Set

Feature Settings

Digital Experience

Settings

Features

Tools

Alcove

System Account

Transfer of Control

Assignment Profile

Executive Interface

Settings

Scheduling Policy

Basic

Profile Automation

Automation rules (beta)

Automation rules (beta)

Permission Set

permission f

Test Settings | Update | Create | Edit | Import | Manage | Assignments

Permission Set Overview | Object Permissions | Accounts

Accounts

Object Permissions

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

Field Permissions

Field name	Read access	Edit access
Account Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Details	<input type="checkbox"/>	<input type="checkbox"/>
Name	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	<input type="checkbox"/>	<input type="checkbox"/>
Billing Address	<input type="checkbox"/>	<input type="checkbox"/>

https://test-3f-dev-ed.sfdc.my.salesforce.com/lightning/setup/permissionspage?address=570P5500001872j65H453D0myPermissions%26r53DAccount

Setup | Home | Object Manager | Search Setup

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Automation rules (beta)

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permission f

Test Settings | Update | Create | Edit | Import | Manage | Assignments

Permission Set Overview | Object Permissions | Accounts

Accounts

Object Permissions

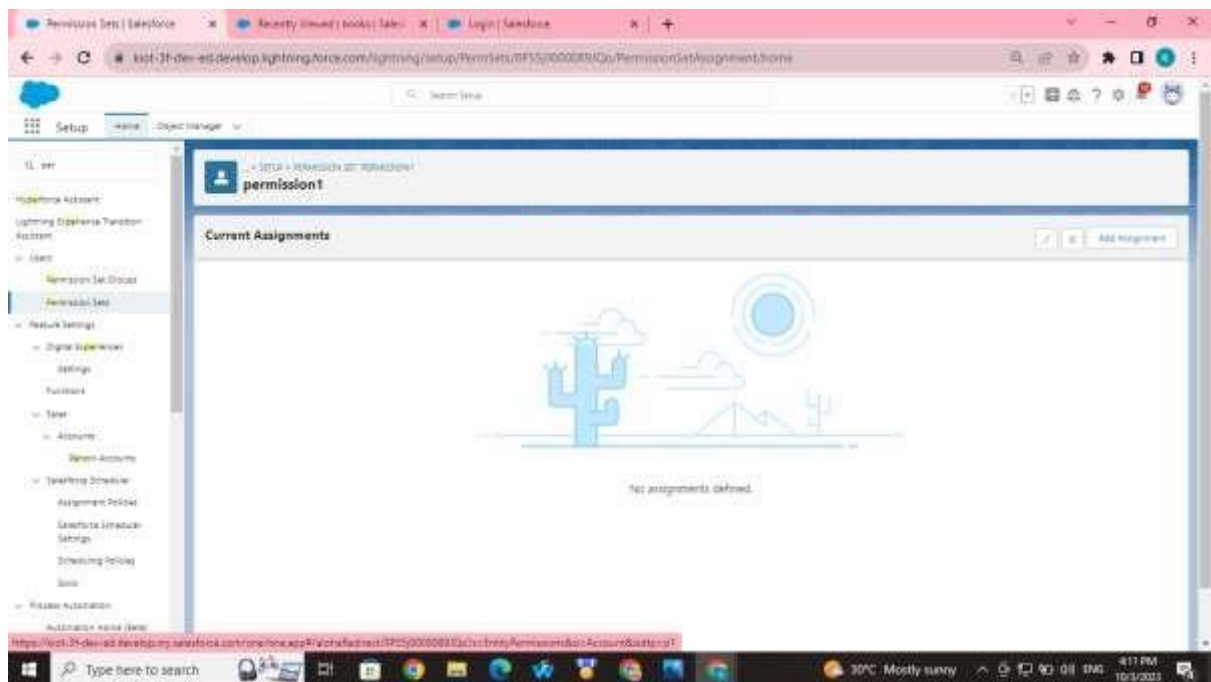
Permission name	Read
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

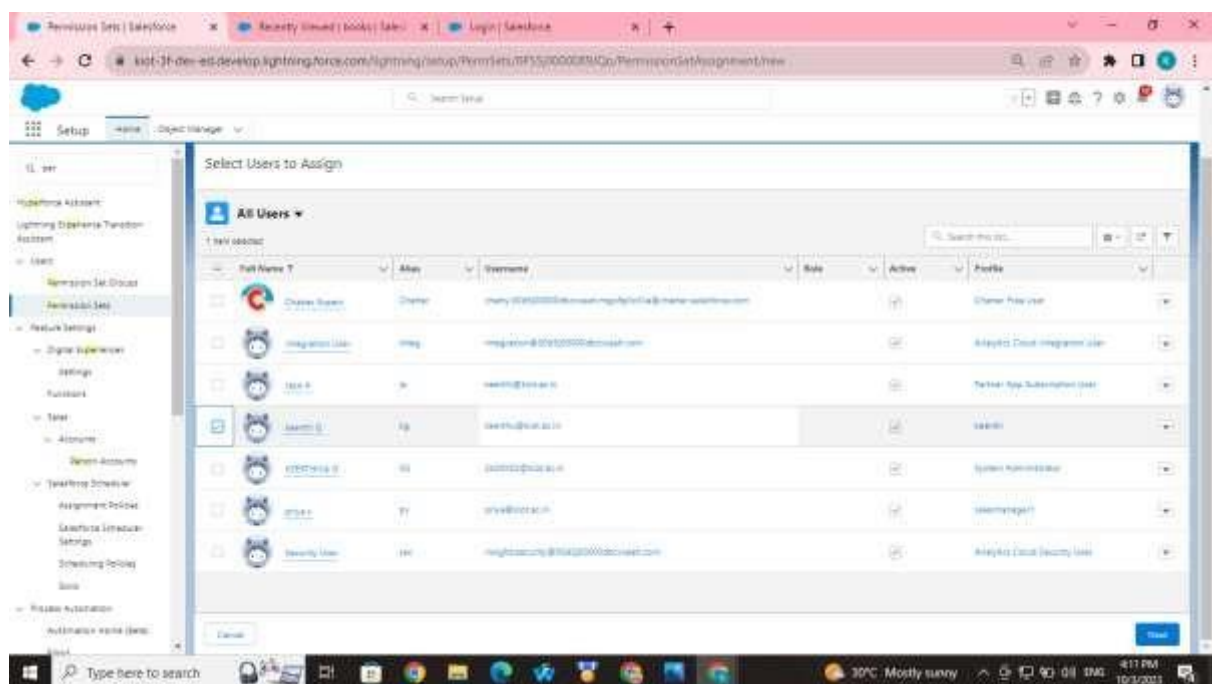
Field Permissions

Field name	Read access	Edit access
Account Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Number	<input type="checkbox"/>	<input type="checkbox"/>
Account Owner	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Site	<input type="checkbox"/>	<input type="checkbox"/>
Account Details	<input type="checkbox"/>	<input type="checkbox"/>
Name	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	<input type="checkbox"/>	<input type="checkbox"/>
Billing Address	<input type="checkbox"/>	<input type="checkbox"/>

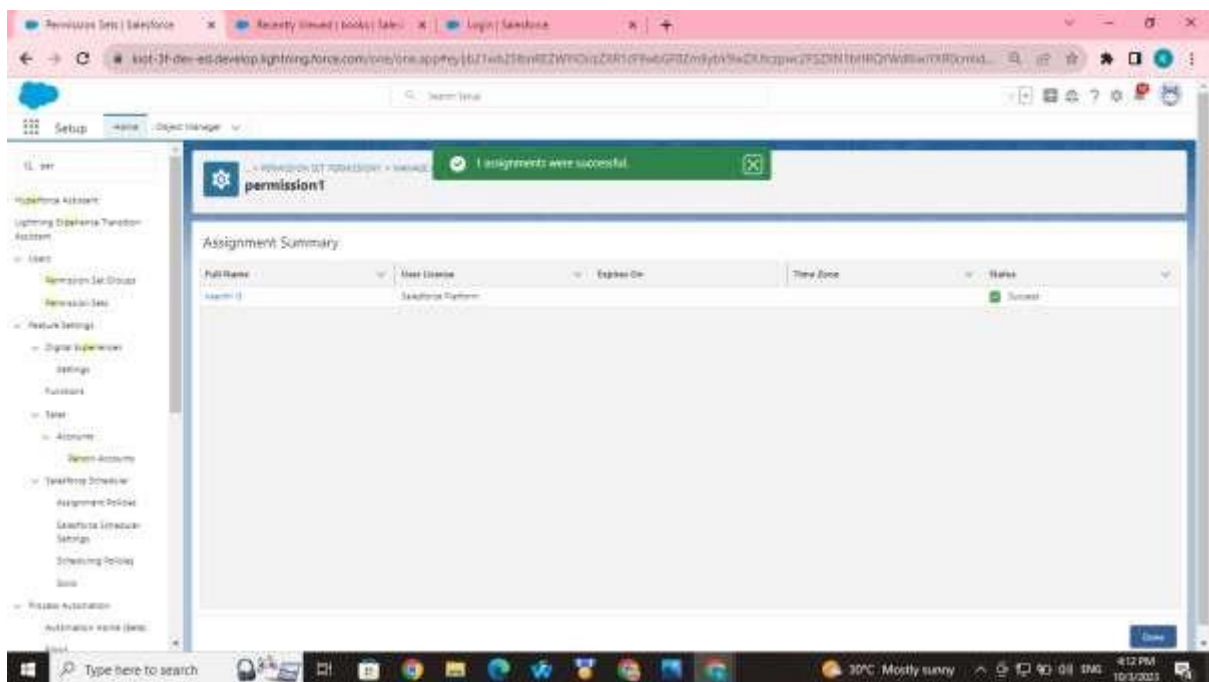
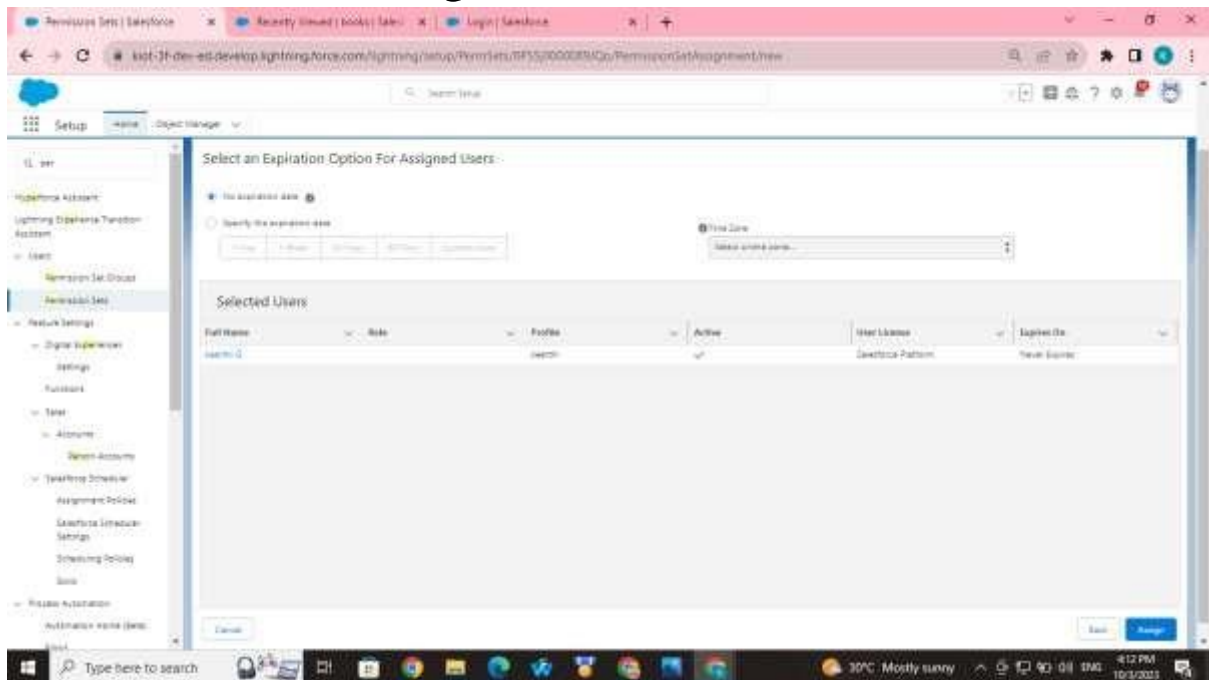
Step 8

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.





Now click on Assign.



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

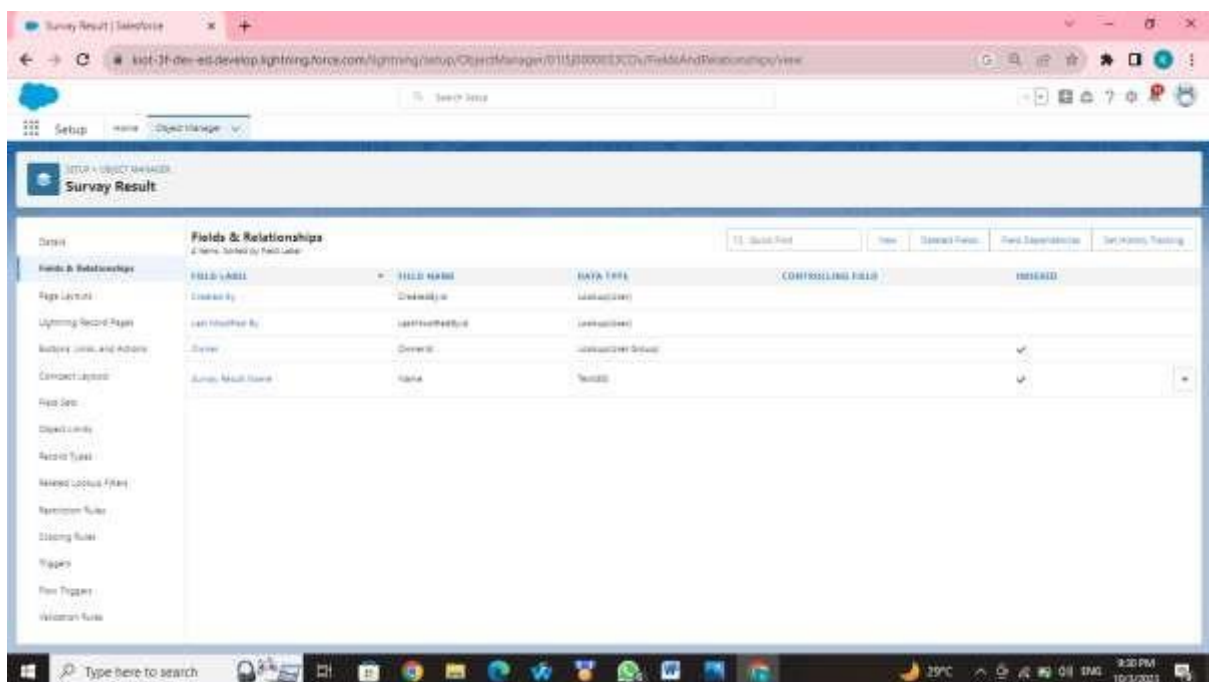
4. Create a screen flow for a basic survey to fill in the details for any form.

Solution:

Step 1: Create a Custom Object

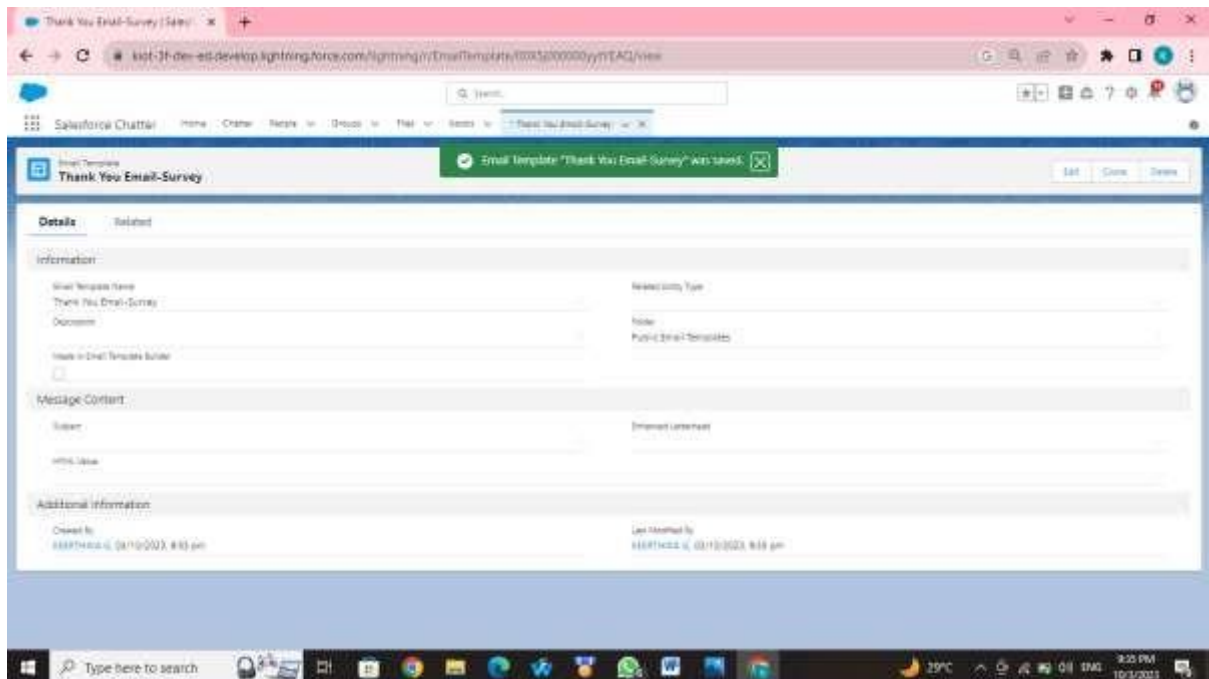
The next step is to create a custom object **Survey Result** and a few custom fields to store survey responses.

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**.



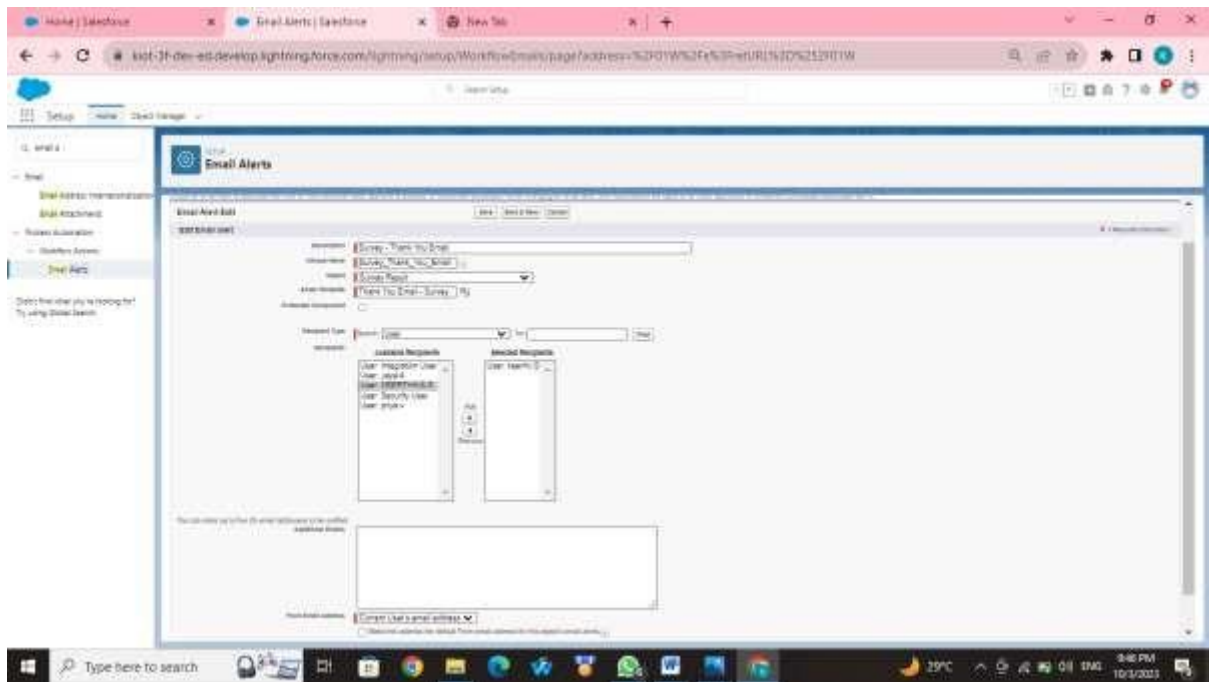
Step 2: Create a Thank You For Survey Lightning Email Template

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.



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**.



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 autopopulate.
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** 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**.

Edit Create Records

Create Salesforce records using values from the flow.

* Label: Save Response * API Name: Save_Response

Description

How Many Records to Create

☒ One ☐ Multiple

How to Set the Record Fields

☐ Use all values from a record ☒ Use separate resources, and literal values

Create a Record of This Object

* Object: Survey Result

Set Field Values for the Survey Result

Field	Value
Comment__c	A_3 Comment X
Email__c	A_3 Email > Value X
Name__c	{!Name.firstName} {!Name.lastName}
Rating__c	A_3 Rating X

+ Add Field

☐ Manually assign variables

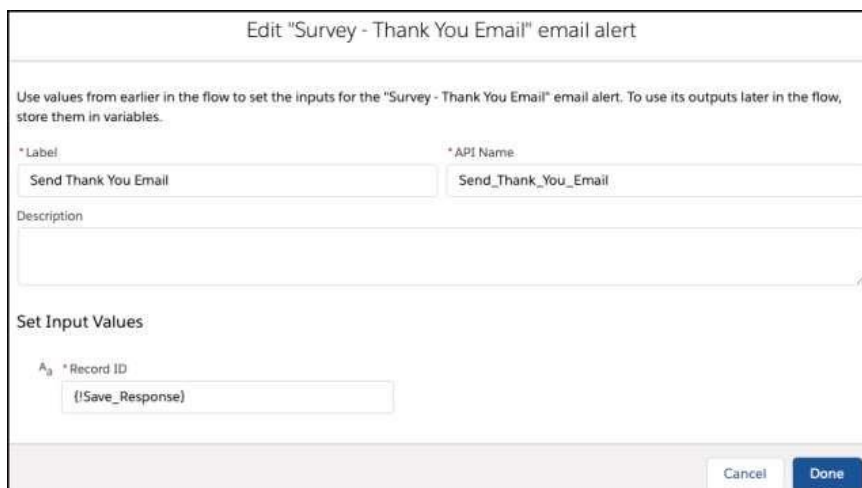
Cancel Done

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 contains a text area for a description, a "Set Input Values" section with a "Record ID" field set to "{!Save_Response}", and "Cancel" and "Done" buttons at the bottom.

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

* Record ID: {!Save_Response}

Cancel Done

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



1. Click **Save**.
2. Enter **Flow Label** the **API Name** will autopopulate.
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

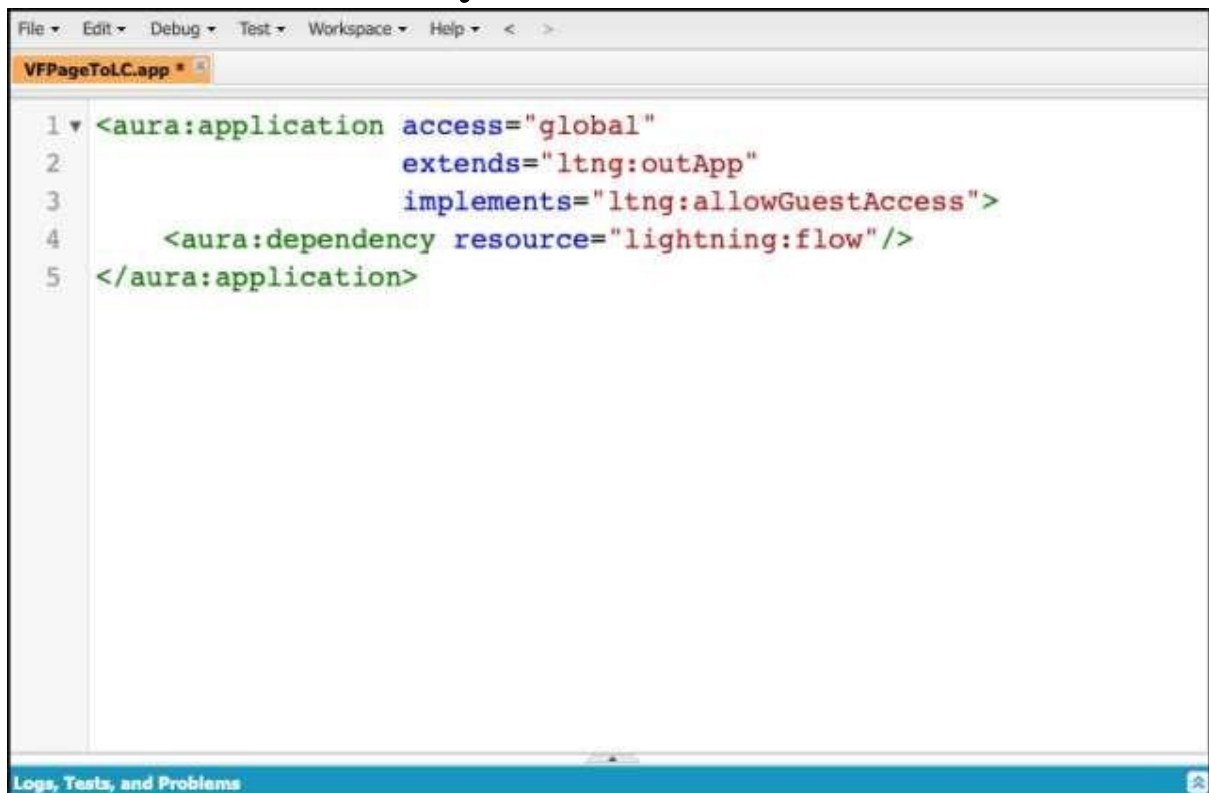
Save

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.

A screenshot of an IDE window titled 'VFPPageToLC.app'. The code editor shows the following XML code:

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

The bottom status bar indicates 'Logs, Tests, and Problems'.

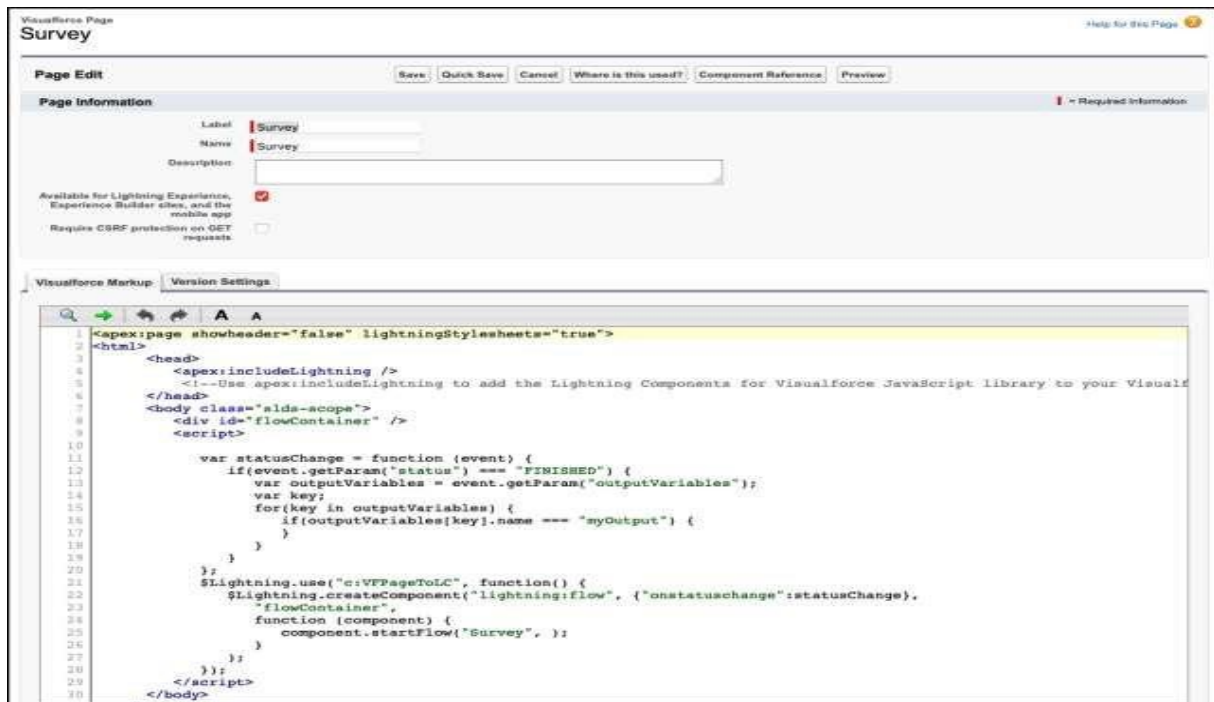
Step 6: Create a Visualforce Page and Embed

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**.

Site Edit

SaveCancel

Site Label

Survey

i

Site Name

Survey

i

Site Description

Site Contact

Rakesh Gupta

i

Default Record Owner

Rakesh Gupta

i

Default Web Address

http://katiyar-developer-edition.gus.force.com/ survey

i

Active

☒

i

Active Site Home Page

Survey

[Preview]

Inactive Site Home Page

InMaintenance

[Preview]

Site Template

SiteTemplate

i

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

i

URL Rewriter Class

i

Enable Feeds

☐

Clickjack Protection Level

Allow framing by the same origin only (Recommended)

i

Require Secure Connections (HTTPS)

☒

i

Lightning Features for Guest Users

☒

i

Upgrade all requests to HTTPS

☒

i

Enable Content Sniffing Protection

☒

i

Enable Browser Cross Site Scripting Protection

☒

i

Referrer URL Protection

☒

i

Guest Access to the Payments API

☐

i

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

* Rating

5

* Comment

Awesome Blog

Next

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

Thank You For Completing Our Survey!

Survey Site Guest User

[via bj9amq6fe7r-b-cdzemaa.gs0.bnc.salesforce.com](#)

to me

8:09 PM (1 minute ago)

Hi Alok Sinfal,

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

Reply

Forward