

## A. Salesforce Fundamentals

### 1. Can two users have the same profile? Can two profiles be assigned to the same user?

Profiles determine the level of access a user can have in a **Salesforce org**.

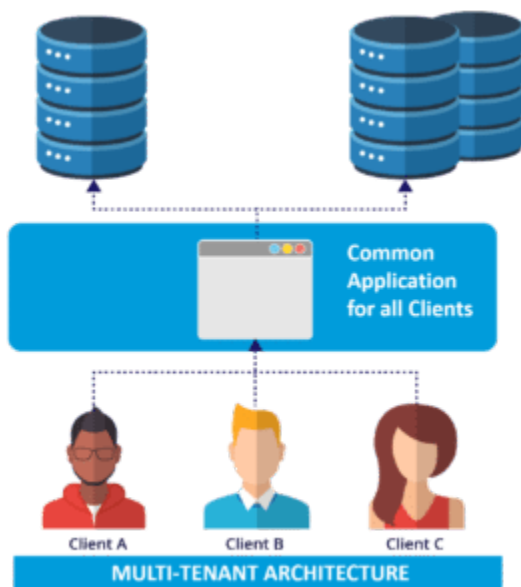
As far as the first part of the question is concerned, Yes. One profile can be assigned to any number of users. Take the example of a Sales or Service team in a company. The entire team will be assigned the same profile. The admin can create one profile: *Sales Profile*, which will have access to the Leads, Opportunities, Campaigns, Contacts and other objects deemed necessary by the company.

In this way, many users can be assigned the same profile. In case the team lead or manager need access to additional records/ objects then it can be done by assigning **permission sets** only for those users.

Answering the second part of the question, each user can only be assigned 1 profile.

### 2. What are Governor Limits in Salesforce?

In Salesforce, it is the **Governor Limits** which controls how much data or how many records you can store in the shared databases. Why? Because Salesforce is based on the concept of multi-tenant architecture. In simpler words, Salesforce uses a single database to store the data of multiple clients/ customers. The below image will help you relate to this concept.



To make sure no single client monopolizes the shared resources, Salesforce introduced the concept of **Governor Limits** which is strictly enforced by the Apex run-time engine.

Governor Limits are a Salesforce developer's biggest challenge. That is because if the Apex code ever exceeds the limit, the expected governor issues a run-time exception that cannot be handled. Hence as a Salesforce developer, you have to be very careful while developing your application.

Different Governor Limits in Salesforce are:

- Per-Transaction Apex Limits
- Force.com Platform Apex Limits
- Static Apex Limits
- Size-Specific Apex Limits
- Miscellaneous Apex Limits
- Email Limits
- Push Notification Limits

### **3. What is a sandbox org? What are the different types of sandboxes in Salesforce?**

A sandbox is a copy of the production environment/ org, used for testing and development purposes. It's useful because it allows development on Apex programming without disturbing the production environment.

When can you use it?

You can use it when you want to test a newly developed Force.com application or Visualforce page. You can develop and test it in the Sandbox org instead of doing it directly in production.

This way, you can develop the application without any hassle and then migrate the metadata and data (if applicable) to the production environment. Doing this in a non-production environment allows developers to freely test and experiment applications end to end.

Types of Sandboxes are:

- Developer
- Developer Pro
- Partial Copy
- Full

### **4. Can you edit an apex trigger/ apex class in production environment? Can you edit a Visualforce page in production environment?**

No, it is not possible to edit apex classes and triggers directly in production environment.

It needs to be done first in Developer edition or testing org or in Sandbox org. Then, to deploy it in production, a user with Author Apex permission must deploy the triggers and classes using deployment tools.

However, Visualforce pages can be created and edited in both sandbox and in production.

Only if the page has to do something unique (different values), it would have to be developed via Sandbox.

### **5. What are the different data types that a standard field record name can have?**

A standard field record name can have data type of either **auto number** or **text field** with a limit of 80 chars.

For generating auto numbers, the format needs to be specified while defining the field and after that for every record that is added, the number will get auto generated. For example:-

**Sr No-{1}**

**Sr No-{2}**

**Sr No-{3}**

## 6. Why are Visualforce pages served from a different domain?

Visualforce pages are served from a different domain to improve security standards and block cross site scripting. Take a look at the highlighted portion in the below Visualforce page:-

## Declarative Features

### 7. What is WhoId and WhatId in activities?

*WhoID* refers to people. Typically: contacts or leads. Example: LeadID, ContactID

*WhatID* refers to objects. Example: AccountID, OpportunityID

### 8. What is the use of writing sharing rules? Can you use sharing rules to restrict data access?

Sharing rules are written to give **edit access** (public read and write) or **public read only access** to certain individuals in Salesforce org. A classic example is when:- only your managers or superiors need to be given extra credentials to your records in objects as compared to your peers.

By default, all users in your organization will have **organization-wide-default** sharing settings of either **Public Read Only** or **Private**.

To give access to more records, which users do not own, we write sharing rules.

Example: Sharing rules are used to extend sharing access to users in public groups or roles. Hence, sharing rules are not as strict as organization-wide default settings. They allow greater access for those users.

As far as the second part of the question is concerned, the answer is no. We cannot use sharing rules to restrict data access. It is only used for allowing greater access to records.

### 9. What are the different types of email templates that can be created in Salesforce?

The different types of Email templates are listed in the below table:-

Text	All users can create or change this template
<b>HTML with letterhead</b>	Only Administrators and users having “Edit HTML Templates” permissions can create this template based on a letterhead.
<b>Custom HTML</b>	Administrators and users having “Edit HTML Templates”

	permissions can create this template without the need of a letterhead
<b>Visualforce</b>	Only administrators and developers can create this template. Advanced functionalities like merging data from multiple records is available only in this template

### C. Audit & Reporting Features

#### 10. What is a bucket field in reports?

A bucket field lets you group related records together by ranges and segments, without the use of complex formulas and custom fields. Bucketing can thus be used to **group**, **filter**, or **arrange** report data. When you create a bucket field, you need to define multiple categories (buckets) that are used to group report values.

The advantage is that earlier, we had to create custom fields to group or segment certain data.

#### 11. What are dynamic dashboards? Can dynamic dashboards be scheduled?

Before we understand dynamic dashboards, let us first understand static dashboards. Static dashboards are the basic dashboard types that will be visible to any user who has made a report out of his data. An example of this is what a Sales manager/ Marketing manager would be able to see on his Salesforce org. In other words, a normal dashboard shows data only from a single user's perspective. Now comes the concept of dynamic dashboards.

**Dynamic dashboards** are used to display information which is tailored to a specific user. Let us consider the same example as above. In case the Sales manager wants to view the report generated specific to only one of his team members, then he can use dynamic dashboards.



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You can use dynamic dashboards when you want to show user-specific data of a particular user, such as their personal quotas and sales, or number of case closures, or leads converted etc.

You can also use a normal/ static dashboard when you want to show regional or organization-wide data to a set of users, such as a particular region's sales number, or a particular support team's performance on case closures.

As far as the second part of the question is concerned, no we cannot schedule a dynamic dashboard. That is because whenever we open the dashboard, it will show the data generated in real-time.

## 12. What are the different types of reports available in Salesforce? Can we mass delete reports in Salesforce?

### Salesforce Report Types

<b>1. Tabular reports</b>	Simple Excel type tables which provide a list of items with the grand total
<b>2. Summary reports</b>	Similar to Tabular reports, but also have functionality of grouping rows, viewing subtotals & creating charts
<b>3. Matrix reports</b>	Two-dimensional reports which allow you to group records both by row and column
<b>4. Joined reports</b>	Multiple blocks showing data from different reports based on same or different report types

Another important point to note here is that, only Summary reports and Matrix reports can be fed as data source for dashboards. Tabular and Joined reports cannot be used as data source for dashboards.

Can we mass delete reports in Salesforce? Of Course we can mass delete reports in Salesforce. The option to mass delete reports can be found under **Data Management** in **Setup**.

## 13. What are the different types of object relations in salesforce? How can you create them?

No list of Salesforce interview questions is complete without involving relationships between objects in Salesforce. Relationships in Salesforce can be used to establish links between two or more objects.

The different types of object relationships in Salesforce are:

1. **Master-Detail Relationship (1:n):-** It is a parent-child relationship in which the master object controls the behavior of the dependent child object. It is a 1:n relationship, in which there can be only one parent, but many children. The main concept you need to be know is that, being the controlling object, the master field cannot be empty. If a record/ field in master object is deleted, the corresponding fields

in the dependent object are also deleted. This is called a cascade delete. Dependent fields will inherit the owner, sharing and security settings from its master. You can define master-detail relationships between two custom objects, or between a custom object and standard object as long as the standard object is the master in the relationship.

**2. Lookup Relationship (1:n):-**

Lookup relationships are used when you want to create a link between two objects, but without the dependency on the parent object. Similar to Master-Detail relationship, you can think of this as a form of parent-child relationship where there is only one parent, but many children i.e. 1:n relationship. The difference here is that despite being controlling field, deleting a record will not result in automatic deletion of the lookup field in the child object. Thus the records in the child object will not be affected and there is no cascade delete here. Neither will the child fields inherit the owner, sharing or security settings of its parent.

**3. Junction Relationship (Many-To-Many):-**

This kind of a relationship can exist when there is a need to create two master-detail relationships. Two master-detail relationships can be created by linking 3 custom objects. Here, two objects will be master objects and the third object will be dependent on both the objects. In simpler words, it will be a child object for both the master objects.

**14. What happens to detail record when a master record is deleted? What happens to child record when a parent record is deleted?**

In a Master-Detail relationship, when a master record is deleted, the detail record is deleted automatically (Cascade delete).

In a Lookup relationship, even if the parent record is deleted, the child record will not be deleted.

**15. Can you have a roll up summary field in case of Master-Detail relationship?**

Yes. You can have a roll-up summary in case of a master-detail relationship. But not in case of a lookup relationship.

A roll-up summary field is used to display a value in a master record based on the values of a set of fields in a detail record. The detail record must be related to the master through a master-detail relationship.

There are 4 calculations that you can do using roll-up summary field. You can count the number of detail records related to a master record. Or, you can calculate the sum, minimum value, or maximum value of a field in the detail records.

**16. Explain the term “Data Skew” in Salesforce.**

“Data skew” is a condition which you will encounter when working for a big client where there are over 10,000 records. When one single user owns that many records we call that condition ‘ownership data skew’.

When such users perform updates, performance issues will be encountered because of “data skew”. This happens when a single user/ members of a single role own most of the records for a particular object.

### **17. Explain skinny table. What are the considerations for Skinny Table?**

In Salesforce, skinny tables are used to access frequently used fields and to avoid joins. This largely improves performance. Skinny tables are highly effective, so much so that even when the source tables are modified, skinny tables will be in sync with source tables.

Considerations for skinny tables:

- Skinny tables can contain a maximum of 100 columns.
- Skinny tables cannot contain fields from other objects.
- For full sandboxes: Skinny tables are copied to your Full sandbox organizations, as of the Summer '15 release.

### **18. Which fields are automatically Indexed in Salesforce?**

Only the following fields are automatically indexed in Salesforce:

- **Primary keys** (Id, Name and Owner fields).
- **Foreign keys** (lookup or master-detail relationship fields).
- **Audit dates** (such as SystemModStamp).
- **Custom fields** marked as an External ID or a unique field.

### **19. How to handle comma within a field while uploading using Data Loader?**

In a Data Loader .CSV, if there is a comma in field content, you will have to enclose the contents within double quotation marks: ” “.

### **20. For which criteria in workflow “time dependent workflow action” cannot be created?**

Time dependent workflow action cannot be create for: “**created, and every time it’s edited**”.

### **21. What are the types of custom settings in Salesforce? What is the advantage of using custom settings?**

There are two types of custom settings in Salesforce: **List Custom Settings** and **Hierarchy Custom Settings**.

List Custom Settings are a type of custom settings that provides a reusable set of static data that can be accessed across your organization irrespective of user/ profile.

Hierarchy Custom Settings are another type of custom settings that uses built-in hierarchical logic for “personalizing” settings for specific profiles or users.

The advantage of using custom settings is that it allows developers to create a custom set of access rules for various users and profiles.

## **22. How many active assignment rules can you have in a lead/ case?**

Only one rule can be active at a time.

## **23. What are custom labels in Salesforce? What is the character limit of custom label?**

Custom labels are custom text values that can be accessed from Apex classes or Visualforce pages. The values here can be translated into any language supported by Salesforce. Their benefit is that they enable developers to create multilingual applications which automatically presents information in a user's native language.

You can create up to 5,000 custom labels for your organization, and they can be up to 1,000 characters in length.

## **24. What is the difference between a Role and Profile in Salesforce?**

As mentioned in one of the previous Salesforce interview questions, a profile will ultimately control access to which records a user has in a Salesforce org. No user can work on the Salesforce org without being assigned a profile. The **Profile** is therefore mandatory for every user.

**Role** however is not mandatory for every user. The primary function of the Role/ Role hierarchy is that it allows higher level users in hierarchy get access to records owned by lower level users in the hierarchy. An example of that is Sales Managers getting access to records owned by Sales Reps while their peers do not get access to it.

## **25. What are the examples of non-deterministic Force.com formula fields?**

Before I mention some of the examples, let me give you an introduction to deterministic and non-deterministic formula fields. Formula fields whose value will be static are referred to as deterministic fields. Whereas, formula fields whose value will be changed dynamically or whose values will have to be calculated on the fly, they are referred to as non-deterministic formula fields. A classic example of that is a formula returning the current date and time.

Some examples of non-deterministic fields in Force.com are:

- Lookup fields
- Formula fields whose reference spans over other entities
- Fields having dynamic date functions like:- TODAY() or NOW()

## **26. Why do we need to write test classes? How to identify if a class is a test class?**

Software developers from around the world will unanimously agree that writing code in test classes makes debugging more efficient. Why? That is because test classes help in creating robust and error-free code be it Apex or any other programming language. Since Unit tests are powerful in their own right, Salesforce requires you to write test classes in Apex code.

## **28. What are the different ways of deployment in Salesforce?**

You can deploy code in Salesforce using:



1. Change Sets
2. Eclipse with Force.com IDE
3. Force.com Migration Tool – ANT/Java based
4. Salesforce Package

**29. What is an external ID in Salesforce? Which all field data types can be used as external IDs?**

An external ID is a custom field which can be used as a unique identifier in a record. External IDs are mainly used while importing records/ data. When importing records, one among the many fields in those records need to be marked as an external ID (unique identifier).

An important point to note is that only custom fields can be used as External IDs. The fields that can be marked as external IDs are: **Text, Number, E-Mail and Auto-Number**.

**30. How many callouts to external service can be made in a single Apex transaction?**

Governor limits will restrict a single Apex transaction to make a maximum of 100 callouts to an HTTP request or an API call.

**31. How can you expose an Apex class as a REST Webservice in Salesforce?**

You can expose your Apex class and methods so that external applications can access your code and your application through the REST architecture. This is done by defining your Apex class with the **@RestResource** annotation to expose it as a REST resource. You can then use **global classes** and a **Webservice callback method**.

Invoking a custom Apex REST Web service method always uses system context. Consequently, the current user's credentials are not used, and any user who has access to these methods can use their full power, regardless of permissions, field-level security, or sharing rules.

**32. What is the difference between a standard controller and a custom controller?**

Standard controller in Apex, inherits all the standard object properties and standard button functionality directly. It contains the same functionality and logic that are used for standard Salesforce pages.

Custom controller is an Apex class that implements all of the logic for a page without leveraging a standard controller. Custom Controllers are associated with Visualforce pages through the controller attribute.

**33. How can we implement pagination in Visualforce?**

To control the number of records displayed on each page, we use pagination. By default, a list controller returns 20 records on the page. To customize it, we can use a controller extension to set the **pageSize**. Take a look at the sample code below:-

```

1      <apex:page standardController="Account"
      recordSetvar="accounts">
2      <apex:pageBlock title="Viewing Accounts">
3          <apex:form id="theForm">
4              <apex:pageBlockSection >
5                  <apex:dataList var="a" value="{!accounts}" type="1">
6                      {!a.name}
7                  </apex:dataList>
8              </apex:pageBlockSection>
9              <apex:panelGrid columns="2">
10                 <apex:commandLink
11                 action="{!previous}">Previous</apex:commandlink>
12                 <apex:commandLink
13                 action="{!next}">Next</apex:commandlink>
14             </apex:panelGrid>
15             </apex:form>
16         </apex:pageBlock>
17     </apex:page>

```

### 34. How can you call a controller method from JavaScript?

To call a controller method (Apex function) from JavaScript, you need to use **actionfunction**.

Look at the below piece of code to understand how a controller method is called using actionfunction.

```

1      <script>
2      function JSmethodCallFromAnyAction()
3      {
4          callfromJS();
5      }
6      </apex:page>

```

### 35. How to get the UserID of all the currently logged in users using Apex code?

You can get the ID's of all the currently logged in users by using this global function: **UserInfo.getUserId()**.

**36. How many records can a select query return? How many records can a SOSL query return?**

The Governor Limits enforces the following:-

Maximum number of records that can be retrieved by SOQL command: 50,000.

Maximum number of records that can be retrieved by SOSL command: 2,000.

**38. What are the three types of bindings used in Visualforce? What does each refer to?**

There are three types of bindings used in Salesforce:-

- **Data bindings**, which refer to the data set in the controller
- **Action bindings**, which refer to action methods in the controller
- **Component bindings**, which refer to other Visualforce components.

Data bindings and Action bindings are the most common and they will be used in every Visualforce page.

**39. What are the different types of collections in Apex? What are maps in Apex?**

Collections are the type of variables which can be used to store multiple number of records (data).

It is useful because Governor Limits restrict the number of records you can retrieve per transaction. Hence, collections can be used to store multiple records in a single variable defined as type collection and by retrieving data in the form of collections, Governor Limits will be in check. Collections are similar to how arrays work.

There are 3 collection types in Salesforce:

- Lists
- Maps
- Sets

Maps are used to store data in the form of key-value pairs, where each unique key maps to a single value.

Syntax: `Map<String, String> country_city = new Map<String, String>();`

**40. How can you embed a Visualflow in a Visualforce page?**

1. *Find the flow's unique name.*
  - a. From Setup, enter Flows in the Quick Find box, then select Flows.
  - b. Click the name of the flow.
  - c. Copy the unique name of the flow.
2. *From Setup, enter Visualforce Pages in the Quick Find box, then select Visualforce Pages.*
3. *Define a new Visualforce page, or open an existing one.*
4. *Add the <flow:interview> component somewhere between the <apex:page> tags.*

5. *Set the name attribute to the unique name of the flow.*

For example:

```
1          </apex:page>
2      <flow:interview name="flowuniqueName"/>
3          <apex:page>
```

6. *Click Save.*
7. *Restrict which users can access the Visualforce page.*
  - a. Click Visualforce Pages.
  - b. Click Security next to your Visualforce page.
  - c. Move all the appropriate profiles from Available Profiles to Enabled Profiles by using the 'add' and 'remove' buttons.
  - d. Click Save.
8. *Add the Visualforce page to your Force.com app by using a custom button, link, or Visualforce tab.*

#### 41. What is the use of “@future” annotation?

Future annotations are used to identify and execute methods asynchronously. If the method is annotated with “@future”, then it will be executed only when Salesforce has the available resources.

For example, you can use it while making an asynchronous web service callout to an external service. Whereas without using the annotation, the web service callout is made from the same thread that is executing the Apex code, and no additional processing will occur until that callout is complete (synchronous processing).

#### 42. What are the different methods of batch Apex class?

**Database.Batchable** interface contains three methods that must be implemented:

1. **Start method:**  
global (Database.QueryLocator | Iterable<sObject>) start(Database.BatchableContext bc) {}
2. **Execute method:**  
global void execute(Database.BatchableContext BC, list<P>){}
3. **Finish method:**  
global void finish(Database.BatchableContext BC){}

#### 43. What is a Visualforce component?

A Visualforce Component is either a predefined component (standard from component library) or a custom component that determines the user interface behavior. For example, if you want to send the text captured from the Visualforce page to an object in Salesforce, then you need to make use of Visualforce components. Example: **<apex:detail>**

#### 44. What is Trigger.new?

Trigger.new is a command which returns the list of records that have been added recently to the sObjects. To be more precise, those records will be returned which are yet to be saved to the database. Note that this sObject list is only available in insert and update triggers, and the records can only be modified in before triggers.

But just for your information, Trigger.old returns a list of the old versions of the sObject records. Note that this sObject list is only available in update and delete triggers.

#### 45. What all data types can a set store?

Sets can have any of the following data types:

- Primitive types
- Collections
- sObjects
- User-defined types
- Built-in Apex types

#### 46. What is an sObject type?

An sObject is any object that can be stored in the Force.com platform database. Apex allows the use of generic sObject abstract type to represent any object.

For example, Vehicle is a generic type and Car, Motor Bike all are concrete types of Vehicle. In SFDC, sObject is generic and Account, Opportunity, CustomObject\_\_c are its concrete type.

#### 47. What is the difference between SOQL and SOSL?

The differences are mentioned in the table below:

SOQL vs SOSL

SOQL (Salesforce Object Query Language)	SOSL (Salesforce Object Search Language)
Only one object can be searched at a time	Many objects can be searched at a time
Can query any type of field	Can query only on email, text or phone
Can be used in classes and triggers	Can be used in classes, but not triggers
DML Operation can be performed on query results	DML Operation cannot be performed on search results
Returns records	Returns fields

#### 48. What is an Apex transaction?

An Apex transaction represents a set of operations that are executed as a single unit. The operations here include the DML operations which are responsible for querying records. All

the DML operations in a transaction either complete successfully, or if an error occurs even in saving a single record, then the entire transaction is rolled back.

#### 49. What is the difference between public and global class in Apex?

**Global class** is accessible across the Salesforce instance irrespective of namespaces. Whereas, **public classes** are accessible only in the corresponding namespaces.

#### 50. What are getter methods and setter methods?

**Get (getter) method** is used to pass values from the controller to the VF page. Whereas, the **set (setter) method** is used to set the value back to controller variable.

I hope this set of Salesforce interview questions will help you ace your job interview. As the next step for your career, check out the various certifications offered by Salesforce here: [Salesforce Certifications](#). It will also help you to understand the job roles and chalk out a career path for yourself.

Also, check out this video on the **Top 50 Frequently Asked Salesforce Interview Questions** which was delivered by an industry expert. He has shared his opinion of Salesforce job interviews and industry demand. Do take a at it look and let us know if this helped in your interview preparation.

#### 51. What is Salesforce?

Salesforce is the most effective Customer Relationship Management (CRM) product that is delivered to subscribers as a cost-effective software-as-a-service (SaaS).

#### 52. What is a custom object in Salesforce?

In [Salesforce](#), custom objects refer specifically to database tables that store data related to your company in Salesforce.com.

#### 53. What does a custom object permit the user to do?

Once the custom object is defined, the subscriber can perform the following tasks: create custom fields, relate the custom object to other records, track events and tasks, build page layouts, create a custom tab for the custom object, analyze custom object data, create dashboards and reports, and share custom tabs, custom apps, custom objects, and various other related components. None of these tasks can be accomplished until the custom object has a definition.

#### 54. What is Self-Relationship?

A Self-Relationship is a lookup relationship to the same object. It is this premise that allows users to take the object “Merchandise” and create relationships with other objects.

#### 55. What is Object Relationship Overview?

In Salesforce, the object relationship overview links custom object records to standard object records in a related list. This is helpful to track product defects in related customer cases. Salesforce allows users to define different types of relationships by creating custom relationship fields on an object.

#### 56. What can cause data loss in Salesforce?

Data loss in Salesforce can be caused by a number of reasons, including:

- Changing data and date-time.
- Migrating to percent, number, and currency from other data types.
- Changing from the multi-select picklist, checkbox, auto number to other types.
- Altering to multi-select picklist from any type except picklist.
- Changing to auto-number except for text.
- Changing from text-area to e-mail, phone, URL, and text.

#### 57. How is SaaS beneficial to Salesforce?

SaaS is subscription-based, so clients can choose not to renew and discontinue using the program at any time without penalty other than not being able to use Salesforce. SaaS is intended to help users avoid heavy initial startup fees and investments. SaaS applications use a simple Internet interface supported by easy integration.

#### 58. How does Salesforce track sales?

Salesforce is a tracking program that records a number of helpful basic details, such as:

- Number of customers served daily
- Daily sales volume
- Detailed reports from Sales Manager
- Sales figures by month or quarter
- Most importantly, Salesforce tracks and reports repeat customer activity, which is the key to any sales organization.

#### 59. How many types of relationships are offered by **Salesforce.com**?

Salesforce recognizes two relationship types: Master-detail relationships and Lookup relationships.

#### 60. What is the trigger?

The trigger is the code that is executed before or after the record is updated or inserted.

#### 61. What is the difference between Trigger and Workflow?

Workflow is an automated process that fires an action based on evaluation criteria and rule criteria. As described above, Trigger is the code that is executed on or after the record is updated or inserted.

62. What is a static resource in Salesforce?

With Salesforce's static resource, subscribers can upload zip files, images, jar files, JavaScript, and CSS files that can be referred in a Visualforce page. The optimum size of static resources in Salesforce is 250 MB.

63. What is the difference between Force.com and Salesforce.com?

Force.com is Platform-as-a-Service (PaaS), while Salesforce.com is Software-as-a-Service (SaaS).

64. Is there a limit for data.com records?

Salesforce users can see their limit from setup easily by simply clicking data.com administration/Users. From the data.com users section, the users can see their monthly limit and exactly how many records are exported during the month.

65. What are the three types of object relations in Salesforce?

The three types of object relations in Salesforce are:

- One-to-many
- Many-to-many
- Master-detail

The relation types are quite logical once the user becomes familiar with the software program.

66. What are the different types of reports available in Salesforce?

The different types of reports in Salesforce are:

- Tabular report that displays the grand total in table form
- Matrix report where grouping is based upon both rows and columns
- Summary reports are detailed reports in which the grouping is based on columns.
- Joined report which allows two or more reports to be joined in a single report

67. Is it possible to schedule a dynamic dashboard in Salesforce?

In Salesforce, it is not possible to schedule a dynamic dashboard.

68. What is the junction object and what purpose does it serve?

Junction objects are used to build many-to-many relationships between objects. For example, the user can take a recruiting application where a position for a job can be linked to many candidates or can link a candidate to many other jobs. In order to connect the data model, a



third party object is referred to as a junction object. In the given example, the junction object is “job application.”

#### 69. What is an Audit Trail?

The Audit Trail function in Salesforce is useful for gaining information or for tracking all the recent setup changes that the administration has done in the organization. The audit trail can preserve data for up to six months.

#### 70. Explain the Salesforce dashboard?

In Salesforce, the dashboard is a pictorial representation of the report. 20 reports can be added to a single dashboard.

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#### 71. What is the difference between SOQL and SOSL?

SOQL is Salesforce Object Query Language and SOSL is Salesforce Object Search Language. If you are sensing that Salesforce is a culture unto itself, you are correct!

#### 72. What is a Wrapper Class?

A Wrapper Class is a class whose instances are a collection of other objects and is used to display different objects on a Visualforce page in the same table.

#### 73. What is the sharing rule?

The sharing rules are applied when a user wishes to allow access to other users.

#### 74. Compare Salesforce Dev 401 with Salesforce Adv Dev 501.

Criteria	Salesforce Dev 401	Salesforce Adv Dev 501
What do we learn?	Building customized applications, analytical functions, etc.	Apex scripts, Developer Console, deploying MVC architecture, etc.
Who can learn?	Software and IT professionals	App and CRM Developers, System Admins, etc.
What is the average annual salary?	US\$99,000	US\$141,000

For more information on average salaries paid to Salesforce professionals across the world, [click here](#)

#### 75. What is the benefit of Salesforce CRM?

Here are some of the top benefits of Salesforce CRM:

- Ensuring faster and better sales opportunity
- Deploying an analytical approach to customer acquisition
- Reducing cost and improving customer satisfaction

- Automation of repetitive and less important tasks
- Improved efficiency and enhanced communication on all fronts

## **76. What are Custom Objects in Salesforce?**

Simply put, custom objects are database tables in Salesforce. All data related to an enterprise can be stored in Salesforce.com, and for that there is a need for a junction object, which is a custom object. The custom object has a Master–Detail relationship. We can create a Master–Detail relationship between two objects, and then connect a child object as a related list. Custom objects, which can be listed in Custom Settings, has a set of static data that is reusable.

In the process, the custom object has to be defined first and then the following steps need to be followed:

- Join records with the custom object
- Custom object data is displayed in custom lists
- Create a custom tab for the custom object
- Build page layouts
- Create a dashboard and a report for analyzing the custom object

Moreover, the custom tab, app, and object can be shared.

## **77. Define Object Relationship in Salesforce.**

In Salesforce, we can link the standard and custom object records in a related list. It is done by the object relationship overview. Various types of relationships can be created in order to connect specific business cases with specific customers. It is possible to create a custom relationship on an object and define various relationship types.

## **78. List various Object Relations in Salesforce.**

Object relations in Salesforce can be of the following types:

- One to many
- Many to many

## **77. What is an App in Salesforce?**

An **app** in Salesforce is a container that contains a name, a logo, and a group of tabs that work as a unit to provide specific functionality. Users can switch between apps using the Force.com app's drop-down menu at the top-right corner of every page.

## **78. Explain the advantages of Salesforce using the SaaS platform.**

Some of the main benefits of Salesforce SaaS are:

- Its pay-as-you-go model perfectly suits all customers
- No hassle of infrastructure management
- All applications are accessed via the Internet
- Easy integration between various applications
- Latest features are provided without any delay
- Guaranteed uptime and security
- Scalable performance for various operations
- Ability to access via mobile devices from anywhere

### 79. How does Salesforce deploy Sales Tracking?

Salesforce is very meticulous when it comes to recording intricate details like sales numbers, customer details, customers served, repeat customers, etc. Salesforce makes it easy to create detailed reports, charts, and dashboards for keeping track of sales.

### 80. What are Workflows in Salesforce? What are Actions in a Workflow?

A workflow in Salesforce is basically a container or business logic engine that automates certain actions based on particular criteria. If the criteria are met, the actions get executed. When they do not, the record will get saved but no action will be executed.

There are two types of actions in a workflow in Salesforce:

- **Immediate Actions:** Actions that get executed immediately when the record is created or edited
- **Time-dependent Actions:** Actions that get executed after a certain duration of time, such as 10 days before a records' close date. After a certain time period, the workflow rules in Salesforce will re-evaluate the record just to make sure that the rule criteria are met. If the record meets the criteria, the aligned actions will be executed.

A **Master–Detail** relationship is basically a parent–child relationship, in which 'Master' represents the parent and other details represent the child. If the parent is deleted, then the child also gets deleted. **Roll-up summary** fields can only be created on Master records, which will calculate the SUM, AVG, and MIN of the child records.

### 81. What happens to the Detail (Child) record when a Master (Parent) record is deleted?

In a Master–Detail relationship, when a Master record is deleted, the Detail record also gets deleted, automatically.

On the other hand, in a Lookup relationship, the Child record will not be deleted, even if the Parent record is deleted.

### 82. Can you have a Roll-up Summary field in the case of a Master–Detail Relationship?

Yes, we can have a roll-up summary in the case of a Master-Detail relationship but not in the case of a Lookup relationship. This is because a roll-up summary field is used to display a value in the Master record based on the values of a set of fields in the Detail record.

### 83. What is an sObject type?

An sObject is any object that can be stored in the Force.com platform database. Apex allows the use of a generic sObject abstract type to represent any object.

For example, 'vehicle' is a generic type and 'car' and 'motorbike' are concrete types of 'vehicle'.

### 84. What are Triggers in Salesforce? How are they different from Workflows?

Triggers in Salesforce are called **Apex Triggers**. These are distinct and are available specifically for common and expected actions like lead conversions. It is just a code that is executed before or after a record is inserted or updated.

A trigger is different from a workflow as the former is a piece of code; whereas, a workflow is an automated process and uses no code.

### **85. What is trigger.new?**

Trigger.new returns a list of records that have been added recently to sObjects. The records that are yet to be saved in the database are returned. Only insert and update triggers have the sObject list, and records can only be modified in before.trigger.

### **86. What is the minimum test coverage required in order to deploy a trigger?**

- **System Administrator:** Customization and administration of an application
- **Standard User:** Can edit, view, update, or delete one's own record
- **Read Only:** Able to just view the records
- **Solution Manager:** Comes with the standard user permission but also can manage categories and published solutions
- **Marketing User:** Able to import leads into the organization, along with standard user permissions

### **87. Explain the Force.com platform.**

Force.com is the entire infrastructure and codebase on which the complete Salesforce application exists. In other words, Salesforce is built on Force.com, which is a Platform as a Service (PaaS) that lets us simplify the design, development, and deployment of cloud-based applications and websites. Salesforce Developers can work with Cloud Integrated Development Environment and deploy the applications on Force.com servers.

### **89. List various types of Reports available in Salesforce.**

Below are the types of reports available in Salesforce:

- **Tabular report:** In this, the grand total is displayed in a table format.
- **Matrix report:** This is an in-depth report wherein there are both row-based and column-based grouping.
- **Summary report:** Summary report is a report in which the grouping is on a column basis.
- **Joined report:** Joining two or more reports into one creates a joined report.

### **90. How many Reports can be added to the Salesforce dashboard?**

A Salesforce dashboard can be seen as a visual and pictorial representation of a dashboard with the facility to add up to 20 reports.

### **91. Explain various Salesforce dashboard components.**

Various Salesforce dashboard components are explained below:

- **Gauge:** It is used for showing a single value within a range of custom values.
- **Metric:** This is used for displaying a single key-value pair. It is possible to click the empty text field next to the grand total and enter the metric label directly on the components. All metrics placed above and below one another in the dashboard column would be displayed as a single component.

Various dashboard components are explained below:

- **Table:** The report data can be shown in a column form using Table.
- **Visualforce Page:** It is used for creating a custom component or showing information not available in other component types.
- **Custom S-component:** This contains the content that is run or displayed in a browser like Excel file, ActiveX Control, Java applet, or custom HTML web form.

## 92. What is Visualforce in Force.com?

Visualforce can be defined as the user interface for the Force.com platform. It is a component-based framework that can include over 100 in-built components. It includes a tag-based markup language, and each Visualforce tag corresponds to a page or a field.

The Visualforce framework works on the standard MVC paradigm. It is possible to have tight integration with the database and also deploy auto-generated controllers for database objects. Developers can use Apex codes to write their own controllers. It is also possible to access AJAX components, or they can create their own components.

## 93. What is a Static Resource in Salesforce?

A static resource lets us upload content that is in the form of .jar and .zip formats, style sheets, JavaScript, and so on. It is recommended to deploy a static resource rather than uploading files to the Documents tab since it is possible to pack a set of files into a directory hierarchy and upload it. These files can easily be referred to in a Visualforce page.

## 94. Differentiate between Salesforce Object Query Language and Salesforce Object Search Language.

- **Salesforce Object Query Language (SOQL)** lets us search only one object. We can query for all types of fields in SOQL. Language Data Manipulation (DML) operations can be performed on the query results.
- **Salesforce Object Search Language (SOSL)** lets us search for multiple objects. But, in SOSL, we can query only for texts, emails, and phone numbers. Also, DML operations cannot be performed on the search results.

## 95. What are the different methods of Batch Apex Class?

**Database.Batchable** interface contains three methods that must be implemented:

**Start method:**

```
global (Database.QueryLocator | Iterable<sObject>) start(Database.BatchableContext bc) {}
```

**Execute method:**

```
global void execute(Database.BatchableContext BC, list<P>){}
```

**Finish method:**

```
global void finish(Database.BatchableContext BC){}
```

## Advanced Interview Questions

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## 96. What are the different types of Collections in Apex?

Collections are the type of variables used to store multiple numbers of records (data). Types of collections in Salesforce are:

- Lists
- Maps
- Sets

### **97. What are Maps in Apex?**

Maps are used to store data in the form of key–value pairs, where each unique key maps to a single value.

#### **Syntax:**

```
Map<String, String> country_city = new Map<String, String>();
```

### **98. What is an Apex Transaction?**

An Apex transaction represents a set of operations that are executed as a single unit. These operations include DML operations that are responsible for querying records. All the DML operations in a transaction either get completed successfully or get rolled back completely if an error occurs even in saving a single record.

### **99. What is the difference between Public Classes and Global Classes in Apex?**

A global class is accessible across the Salesforce instance, irrespective of namespaces. Whereas, public classes are accessible only in the corresponding namespaces.

### **100. What are Getter and Setter methods?**

The get (getter) method is used to pass values from the controller to the VF page.

Whereas, the set (setter) method is used to set the value back to the controller variable.

### **101. Which fields are automatically indexed in Salesforce?**

The following fields are automatically indexed in Salesforce:

- Custom fields marked as an external ID or a unique field
- Primary keys (ID, Name, and Owner fields)
- Audit dates (such as SystemModStamp)
- Foreign keys (Lookup or Master–Detail relationship fields)

### **102. A Time-dependent Workflow Action cannot be created for which Workflow?**

A time-dependent workflow cannot be created for ‘**created, and every time it’s edited.**’

### **103. What is Sandbox in Salesforce? What are the types of Sandboxes available?**

Sandbox is a similar copy of a Salesforce production for testing, development, and training. The content and size of a sandbox may vary depending on the type of sandbox and the edition of the production organization which is associated with the sandbox. There are four types of sandboxes available:

- Developer Sandbox
- Developer Pro Sandbox
- Partial Data Sandbox
- Full Sandbox

#### **104. What is Apex Class?**

An apex class is a template from which Apex objects can be created. These classes consist of other classes, variables, user-defined methods, exception types, and the static initialization code.

#### **105. What is Salesforce CRM?**

It is a cloud-based CRM that doesn't require IT experts to set up or manage the cloud. One can simply log in and connect to the customers directly. CRM Salesforce system is a well-organized platform that provides information to its customers from different sources. It is a customer-centric system that integrates customers' information for an organization's benefit.

!

#### **106. What is Salesforce Lightning?**

Salesforce Lightning is a platform that provides tools to every organization to build next-generation UI and UX in Salesforce. Lightning creates a modern productivity-boosting user experience. It is used to create a fast, beautiful, and unique user experience, just like real lightning, so that sales teams can sell their products faster. Lightning Experience uses an open-source Aura framework. It is a completely re-designed framework to create a modern user interface.

#### **107. Why use Batch Apex instead of Normal Apex?**

There are various reasons why Batch Apex is better than Normal Apex.

- A Normal Apex uses 100 records per cycle to execute SOQL queries. Whereas, a Batch Apex does the same in 200 records per cycle. So, it is very fast when the execution of SOQL queries is considered.
- A Normal Apex can retrieve 50,000 SOQL queries but, in Batch Apex, 50,000,000 SOQL queries can be retrieved.
- A Normal Apex has a heap size of 6 MB; whereas, a Batch Apex has a heap size of 12 MB.
- When executing bulk records, Normal Apex classes are more vulnerable to encountering errors as compared to Batch Apex. The latter is normally error-less.

#### **108. How can you call an Apex Class in Salesforce?**

Ways to call an Apex class in Salesforce are as follows:

- From the Visualforce page
- From Developer Console
- From JavaScript links
- By using a trigger
- From another class
- From home page components

#### **109. How will you create a many-to-many relationship?**

A many-to-many relationship can be created by using a **junction object**. A Junction object is a custom object that has two Master-Detail relationships.

### 111. What are the different types of Reports available in Salesforce?

Based on the structural differences, Salesforce has four different types of reports:

<b>Tabular Report</b>	A tabular report displays data in the form of an Excel-like table that provides a list of items with the grand total.
<b>Joined Report</b>	A joined report is a combined report having multiple blocks that show data from different reports, either of the same or of different report types.
<b>Matrix Report</b>	A matrix report works for 2-dimensions and allows to group records row-wise and column-wise.
<b>Summary Report</b>	In a summary report, the view is in a table form only, but it has more functionalities like grouping rows (only), viewing subtotals, and creating charts.

### 112. How does Salesforce track sales?

There are unique procedures followed by every company for tracking their sales. Various companies track the performance of sales by data analysis. The tracking system of Salesforce allows companies to collect basic details for evaluating the performance, such as:

- Customers who are served daily
- Number of daily sales
- Day-to-day report of sales from Sales Managers
- Sales figures on a weekly, monthly, or quarterly basis depending on organizations' needs
- Details of the repeat customers who serve as the key factor for the growth of any organization

### 113. What is the junction object?

Junction objects help associate two objects. They are custom objects in Salesforce that allow building a master-detail relationship established between two different data objects. It uses a many-to-many relationship to link many junction objects to several records.

**Example:** If a candidate applies for a job, then the job profile can be connected to many applicants, and the candidate can be linked to several other jobs as well. Here, the junction object will be the 'job profile.'

### 114. What is the difference between a role and a profile in Salesforce?

#### Role

A role helps manage and regulate the Salesforce access that affects reports. Also, it allows controlling user visibility over data within an organization. Users who can access the data and perform operations on it are given a specific role. Candidates with a specific role can share the reports with other team members.

#### Profile

A profile is an essential component of any organization. Moreover, it is compulsory for all users to verify their identity for legal authorization. It helps secure an organization's data from illegal visitors. It is not permissible to operate Salesforce without having a profile. It also controls the types of records that a user can see.

### 115. What is a wrapper class in Salesforce?

A wrapper class is a type of container class in Salesforce that contains a group of objects as its segments. Also, the wrapper class is of an abstract data type.



In Salesforce, we use a wrapper class to envelop collected data. A programmer defines the wrapper class that acts as custom objects, along with its properties.

Moreover, the instances of a wrapper class help represent distinct objects in the corresponding table on a Visualforce page.

#### **116. What are the reasons that can cause data loss in Salesforce?**

There are various reasons due to which Salesforce data can be lost, and they are:

- Altering the date and time
- Converting parameters such as number and currency from other data types
- Importing data that, at times, goes wrong
- Moving the text, URL, or email from the text area
- Altering auto-number and checkbox
- Modifying the multi-select picklist to other types

#### **117 Differentiate between Triggers and Workflows?**

**Answer:** Trigger takes a programmatic approach but the workflow does not require coding.

When you want to take some actions say for an email, outbound message, task or field update, then a point in click workflow is required.

The workflow rules can be used for the same object or the child to parent objects. However, a trigger can be applied to any type of object.

#### **118 What is the difference between Force.com and Salesforce.com?**

**Answer:** Force.com is a Platform-as-a-Service (PaaS) but Salesforce.com is a Software-as-a-Service (SaaS).

Moreover, Salesforce.com comes as an out-of-the-box solution and comes along with three core products – Sales Cloud, Marketing Cloud, and Service Cloud. It is possible to buy Sales Cloud and access leads, opportunities and reports.

On the contrary, Force.com is not an out-of-the-box solution. It cannot access leads, opportunities, and accounts.

Finally, Salesforce.com is built seamlessly on the Force.com and are interchangeable from a technical point of view.

#### **119 What is a Junction Object?**

**Answer:** Junction objects enable to build many-to-many relationships with Salesforce objects.

**For example:** In a typical recruitment scenario, there are possibilities of creating many positions for candidates and at the same time a candidate can apply for many positions. The third object required for creating a data model is termed as a junction object and in this example, it can be cited as “job application”. Here, you need to use a lookup field for both position and candidate object on the junction object – which is a job application.

#### **120 Define an Audit Trail.**

**Answer:** Administrators need to make changes in the organizational setup. Audit Trail history helps you to track the most recent 20 changes – made in setup, by multiple administrators.

If you want to change the number of records to display on a page, just use the method `setPageSize`, as shown in the below diagram.

### **121 Do you know about the Sharing Rule?**

**Answer:** Sharing rules are about extending sharing access for users belonging to various roles, public groups, and organization and this enables a user greater access. It is usually based on record ownership or other criteria.

### **122 Differentiate between `insert()` and `database.insert()`?**

**Answer:** When using the `insert` method, if there is any failure in inserting the record then there is an error message displayed by the system and not a single record is inserted. On the other hand, when the developer uses the `database.insert()` then it is possible to allow partial insertions of bulk insertions.

### **123 Differentiate between Role and Profile?**

**Answer:** Profile is mandatory for all Salesforce users. No user can work in a Salesforce.org without a profile. It is for controlling the access to records in Salesforce.org for a specific user.

On the other hand, a role controls the level of access the users have for the data. People with a role have the view, edit or report rights for all data owned/shared by lower-level users.

### **124 What is a Permission Set?**

**Answer:** If you want a user to have functional access, then permission sets are settings that allow you to do this without even changing any profile. The same can also enable users with functional access, with no regard to roles. This helps to avoid the time-consuming task of creating a profile.

### **125 What are the differences between Workflow and Process Builder? What is the difference between Trigger and Process Builder?**

**Answer:** Workflows and the Process Builder are types of declarative automation tools that can extend the functionality of the Salesforce platform. They have functionalities and features which enable them to automate the business processes.

Workflows can only handle four actions such as email alerts, outbound messages, task creation, and field updates. However, Process Builder has a huge number of functionalities such as creating a record, posting to Chatter, launching a flow, submit approvals, and quick actions.

If a process earlier had different workflows for different outcomes, then the same can be accomplished now with one process.

Moreover, only single criteria are evaluated by a Workflow, before triggering the automation. On the contrary, the Process Builder can evaluate multiple criteria and trigger different automation and all this depend on the criteria met.

### 126. What are Sharing Rules?

**Answer:** Sharing rules extend sharing access to the users in roles, public groups or territories. It gives greater access to the users by making automatic exceptions to the sharing settings for the entire org.

This can be based on record ownership or other criteria. It selects the records to share with the users and the level of access to be given to these users or groups.

### 127. What is a Wrapper Class in Salesforce?

**Answer:** A Wrapper class is defined as a class and a data structure. It is an abstract data type which has its instances formed by a collection of objects.

The basic nature is that of a custom object and is defined by the Wrapper class properties. It allows records to be checked from a list and process them for a specific action.

### 128 What are the types of relationships in SFDC?

**Answer:**

- Lookup relation
- Master relation
- Many to May relation(junction creation)
- Hierarchy.

### 129. Difference between sandbox and developer organization?

**Answer:** Sandbox is a test environment where we can test our code and everything or a copy of your Salesforce.com.

In SFDC we are having three types of sandboxes:

- **Configuration sandbox:** 500Mb-Refresh once per day
- **Developer sandbox:** For coding and testing -10MB-Refresh once per day
- **Full sandbox:** No limit-refresh a full copy for every 29 days-in full sandboxes we can make a copy of 180 days for object history.
- 

### 130. What were you doing before SFDC development?

**Answer:** The good developers in the industry were hands-on developers, engineers or architects prior to getting into SFDC. They could come from a Java,.Net, Ruby, C#, SQL, Oracle, SAP, Siebel or any other type of technology development background. The more enterprise-level exp (SAP, Oracle, Sibel, etc) the more attractive.

**Things to avoid:** Admin/Developers, People who have one year of java that then moved to an SFDC admin/dev and are now SFDC developers.

### 131. How many types of Salesforce licenses are there? What are the limits?

**Answer: Salesforce License Types:**

**Salesforce:** Designed for users who require full access to standard CRM and Force.com AppExchange apps. Users with this user license are entitled to access any standard or custom app. Each license provides additional storage for Enterprise and Unlimited Edition users. ( tableau training )

**Salesforce Platform:** Designed for users who need access to custom apps but not to standard CRM functionality. Users with this user license are entitled to use custom apps developed in your organization or installed from Force.com AppExchange. In addition, they are entitled to use core platform functionality such as accounts, contacts, reports, dashboards, documents,

and custom tabs. However, these users are not entitled to some user permissions and standard apps, including standard tabs and objects such as forecasts and opportunities. Users with this license can also use Connect Offline. Users with a Salesforce Platform user license can access all the custom apps in your organization. Each license provides additional storage for Enterprise and Unlimited Edition users.

**Force.com: One App** – Designed for users who need access to one custom app but not to standard CRM functionality. Force.com – One App users are entitled to the same rights as Salesforce Platform users, plus they have access to an unlimited number of custom tabs. However, they are limited to the use of one custom app, which is defined as up to 10 custom objects, and they are limited to read-only access to the Accounts and Contacts objects.

**Force.com App Subscription:** Grants users access to a Force.com Light App or Force.com Enterprise App, neither of which include CRM functionality.

A Force.com Light App has up to 10 custom objects and 10 custom tabs, has read-only access to accounts and contacts and supports object-level and field-level security. A Force.com Light App can't use the Bulk API or Streaming API.

A Force.com Enterprise App has up to 10 custom objects and 10 custom tabs. In addition to the permissions of a Force.com Light App, a Force.com Enterprise App supports record-level sharing, can use the Bulk API and Streaming API and has read/write access to accounts and contacts.

**Knowledge Only User:** Designed for users who only need access to the Salesforce Knowledge app. This license provides access to the following tabs: Articles, Article Management, Chatter, Chatter Files, Home, Profiles, Reports, custom objects, and custom tabs. The Knowledge Only User license includes a Knowledge Only profile that grants access to the Articles tab. To view and use the Article Management tab, a user must have the "Manage Articles" permission.

**Chatter Free:** Designed for Unlimited, Enterprise, and Professional Edition users that don't have Salesforce licenses but need access to Chatter. These users can access standard Chatter people, profiles, groups, and files. They can't access any Salesforce objects or data.

**Chatter Only:** Also known as Chatter Plus. Designed for Unlimited, Enterprise, and Professional Edition users that don't have Salesforce licenses but need access to some Salesforce objects in addition to Chatter. These users can access standard Chatter people, profiles, groups, and files, plus they can:

- View Salesforce accounts and contacts
- Use Salesforce CRM Content, Ideas, and Answers
- Modify up to ten custom objects

### 132. When is page layout assignment used?

**Answer:** After defining page layouts, assign which page layouts users see. A user's profile determines which page layout he or she sees. In addition, if your organization is using record types for a particular tab, the combination of the user's profile and the record type determine which page layout is displayed.

You can assign page layouts from:

The object's customize page layout or record type page

The enhanced profile user interface.

The original profile user interface

To verify that users have the correct access to fields based on the page layout and field-level security, you can check the field accessibility grid.

### **133. What are the pros and cons when using a Workflow Rule Field Update vs. a Formula Field?**

**Answer:** I think your new with Salesforce, but no problem.

The first thing to remember is that “Workflow rule” is not a field type in salesforce.

Workflow rule is the process automation tool that automates your business flow.

**Formula field:** It is a field type on salesforce that produces a read-only output. Sometimes u want some calculated value in a field lest say I want my total sell in a day in one field then I can create one formula field on my object and I will write a formula that will calculate total sell.

The field included in formula field is called its source.

Now there is a similarity between workflow and formula field.

Whenever there is a change in the source field of formula field it automatically re-calculate its field value according to updated value in the source field.

In the same fashion, a workflow can also do the field update.

### **134. What is the benefit of Salesforce CRM?**

**Answer:**

**Here are some of the top benefits of Salesforce CRM**

- Ensuring faster and better sales opportunity.
- Deploying an analytical approach to customer acquisition.
- Reducing cost and improving customer satisfaction.
- Automation of repetitive and less important tasks.
- Improved efficiency and enhanced communication on all fronts
- Know more about why Salesforce is a must for your business?

### **135. What are custom objects in Salesforce?**

**Answer:** Simply put custom objects are the database tables in Salesforce. All the data related to the enterprise can be stored in Salesforce.com. There is a need for Junction Object which is a custom object and it has a master-detail relationship. You can create a master-detail relationship between two objects and then connect a child object to a related list. Custom objects can be a List Custom Setting which is a custom setting that has a set of static data which is reusable. ( oracle apex training )

**These custom objects have to be defined first and then the following steps need to be taken:**

- Join records with custom objects.
- The custom object data are displayed in custom lists.
- Create a custom tab for a custom object.

- Building page layouts.
- Creating a dashboard & report for analyzing the custom object.
- The custom tab, app, an object can be shared

### **136. Define Object relationship overview?**

**Answer:** In Salesforce you can link the standard and custom object records in a related list. It is done by Object relationship overview. Various types of relationships can be created in order to connect specific business cases with specific customers. It is possible to create a custom relationship on an object and define various relationship types. ( puppet training )

### **137. Explain the advantages of Salesforce SaaS functionality?**

**Answer:**

**Some of the main benefits of Salesforce SaaS are:**

- A pay-as-you-go model perfectly suited for all customers.
- No hassle of infrastructure management.
- All applications are accessed via internet.
- Easy integration between various applications.
- Latest features are provided without any delay.
- Guaranteed uptime and security.
- Scalable performance for various operations.
- Ability to access via mobile devices from anywhere
- Now that you are aware of the benefits of Salesforce, check the Salesforce Training.

### **138. How Salesforce deploys sales tracking?**

**Answer:** Salesforce is very meticulous when it comes to recording intricate details like sales numbers, customer details, customers served, repeat customers, in order to create detailed reports, charts, and dashboards for keeping track of sales.

### **139. How many relationships are present in Salesforce?**

**Answer:**

**The two important relationships in Salesforce include:**

- Lookup relationship.
- Master-detail relationship

### **140. What is Track Field History?**

**Answer:**

- 
- 
- While creating the object, we can enable 'Track Field History'.
- If, we enable 'Track Field History' user can see 'Set History Tracking' button under 'Custom Fields & Relationships' section which is available on the object detail page.
- By clicking on 'Set History Tracking' button, we can enable tracking for the fields whichever we want.
- To see the object history, go to object's record layout and add Object Name History related list to the layout.
- Whenever the user changes field value from one value to another value, it will show the history of the field in 'Object History' related list.
-

**141. What is a dependent picklist?**

**Answer:** In some scenario's, we should be able to control one of the fields from another field. Example, if we select Country Controlling field as the US then City should display only US cities.

- We can use checkbox data type fields also while creating dependent picklist.
- We can use multi-select data type fields also while creating dependent picklist.

**143. What is the difference between detail page and edit page?**

**Answer:**

- 
- Whenever a user tries to create a new record or edit an existing record user can input the values for the fields, this page is nothing but edit page.
- After creating a new record or editing an existing record, the user can see the information of the record; this page is nothing but detail page.

**144. What are the types of tabs?**

**Answer:**

- Custom tabs: Its create for objects
- Web tabs: Its create to display a website
- Visual force tabs: It creates to display the visual force page

**145. What is the use of writing sharing rules? Can you use sharing rules to restrict data access?**

**Answer:** Sharing rules are written to give edit access (public read and write) or public read-only access to certain individuals in Salesforce org. A classic example is when: – only your managers or superiors need to be given extra credentials to your records in objects as compared to your peers.

By default, all users in your organization will have organization-wide-default sharing settings of either Public Read Only or Private.

To give access to more records, which users do not own, we write sharing rules.

Example: Sharing rules are used to extend sharing access to users in public groups or roles.

Hence, sharing rules are not as strict as organization-wide default settings. They allow greater access for those users.

As far as the second part of the question is concerned, the answer is no. We cannot use sharing rules to restrict data access. It is only used for allowing greater access to records

**146. What is OWD?**

Organization-Wide Sharing Defaults(OWD) defines the base line setting for the organization. It defines the level of access to the user can see the other user's records. OWD can be Private, Public Read Only, Public Read and Write.

**147. What is a Role and Role Hierarchy?**

**Role:**

- Controls the level of visibility that users have to an organization's data
- A user may be associated to one role

#### Role Hierarchy:

- Controls data visibility
- Controls record roll up – forecasting and reporting
- Users inherit the special privileges of data owned by or shared with users below them in the hierarchy
- Not necessarily the company's organization chart

#### Notes:

- If using Customizable Forecasting, there is a separate forecast role hierarchy.
- EE can create Account, Contact, Opportunity and Case Sharing Rules. PE can ONLY create Account and Contact Sharing Rules.
- Assuming no sharing rules have been created, users in the same role cannot access one another's records.

Example: Org Wide Default settings for opportunities are private. Creating a role and adding two users to that role does not allow those users access to one another's opportunities.

- "Grant Access Using Hierarchies" allows you to disable the default sharing access granted by your role and territory hierarchies. This option can be changed for custom objects that do not have their organization-wide default sharing setting set to Controlled by Parent.

#### **148. What is Manual Sharing?**

- Granting record access, one-off basis
- Owner, anyone above owner in role hierarchy and administrator can manually share records
- Available on Contacts, Leads, Cases, Accounts and Opportunity records and Custom Objects
- Like sharing rules, irrelevant for Public Read/Write organizations

#### **150. What is a Sales Team? (EE/UE)**

- Used for collaborative selling
- Used for sharing as well as reporting purposes
- Ad hoc or may use Default Sales Team (defined for user)
- Default Sales Teams may be automatically added to a user's opportunities
- Who can add a Sales Team?

- Owner
- Anyone above owner in role hierarchy
- Administrator

Adding Default Sales Team Members:

- Click Setup | My Personal Information | Personal Information



## Long Answers (Unit-1 and Unit-2)

Q1 What Are Object Relationships? Create a Lookup Relationship and show with example

Q2 Explain different types of picklists and Compare standard picklist ,custom picklist,custom multi-select picklist

Q3 Using Formula Editor, Displaying an Account Field on the Contact Detail Page. Explain all the steps involved

Q4 Explain the use of filters, cross filters, and filter logic. Explain all filter options in Reports

Q5 Describe what is CRM ? Describe Salesforce Standard and Custom Objects. Describe key features of Lightning Experience?

Q6 What Is the Salesforce Architecture? Define key terms related to the Salesforce architecture.

Q7 List the types of processes that you can build in Process Builder. Define the key components used to create a process

Q8 List the tools included in Lightning Flow. Describe the tools available for automating guided visual experiences. Explain process builder and flow builder with Diagram and example

Q9 Explain Lightning Components and what you can build with Lightning App Builder Write all steps to create a custom Home Page for Lightning Experience

Q10 Describe what business accounts and contacts are, and explain how they're related. What are Best Practices for Managing Accounts and Contacts?

## Long Questions (Unit-3 and unit-4)

Q1 What Does Sales force Identity Do? Explain Features provided by salesforce Identity?

Q2 Describe the difference between objects and field level security

Q3 Explain the importance of giving the right people access to the right data. Explain the four levels at which you can control data access in salesforce

Q4 Using quick start process builder create a new process that updates Contact records whenever the Account billing address changes. As you'll see, it's quite easy, and doesn't require a shred of code.

Q5 Describe the benefits of the metadata-driven development model. Define and give examples of the no-code and low-code development approaches.

Q6 Identify the benefits of Lightning components. Describe how Visualforce is used in Lightning Experience.

Q7 Describe what you should do before you distribute a flow. List the various ways you can distribute a flow. Build a simple screen flow.

Q8 Explain all steps in Automating Business Processes for a Recruiting App ?

Q9 What Is Two-Factor Authentication? How Two-Factor Authentication Works. When Can users be prompted for Two-Factor Authentication? What are the steps to set up the two-factor authentication for every login?

Q10 Explain the business value of Process Builder compared to Workflow. Describe the

overall process of converting workflow rules to processes.

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Rahul Dewani Ritik Maheshwari Priyansh Goyal

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People

Mute all Add people Host controls

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