1) What is cloud computing?

Cloud computing is a concept of accessing infrastructure, platform, software as a service over the internet by paying each use of the IT services.

Cloud computing is a group of UN known resources that are giving for a specific purpose to the user.

2) What are the services provided in cloud computing?

SAAS-software application as a service

PAAS-platform as a service

IAAS- infrastructure as a service

SAAS:- It is the concept of accessing a software application over the internet is called SAAS.

PAAS:-Accessing a platform such as any programming language on witch an application build provided as a service over the internet.

IAAS:- Accessing infrastructure such as application server, storage server over the internet is called IAAS

2) HOW cloud computing is suitable for your organization? (advantages)

We have several advantages using cloud computing

1. It reduces the cost
2. Increased storage capacity.
3. Flexibility is more
4. No need to install any software and no need to buy any licenses.
5. We can access any location
6. Low maintenance and low cost
7. Salesforce adds extra features every release
8. Salesforce has a multi-tenant architecture.

3) HOW many releases in salesforce.

1. Summer release.
2. Winter release.
3. Spring release.

4) Types of cloud computing?

Public Cloud-server maintains at providers
Private Cloud-server maintains at receivers place

Hybrid Cloud - both public and private.

.Sales force offers mainly 3 clouds –sales, service, and collaboration

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5) What are the products in salesforce? (FRS HD2 AC)
   1. Force.com
   2. Radian6
   3. Site.com
   4. Heroku
   5. Data.com
   6. Data base.com
   7. APP exchange
   8. Chatter

Force.com:- 1. To develop the application
2. It having entire coding knowledge
3. It is an MVC architecture.

Radian6:- It is the social media monitoring and engagement platform.

Site.com:- Design and publish websites.

Heroku:- A new way of building and deploying web pages

Data.com:- It deals with correct data.

Data base.com:- It is the only database service natively builds for social enterprise.

APP exchange:- AppExchange is the directory where we can get the inbuilt applications, we can directly download the application from the AppExchange and we can use it

Chatter:- Chatter is the private and secure social network for a company for internal communication.

6) What is the difference between sales force.com and Force.com?
   1. Sales force.com is a keyword used to search for anything.
   2. Sales force.com is a cloud computing and social enterprise software as a service(SAAS)
   3. It is a multitenant architecture.

Force.com:- 1. To develop the application
2. It having entire coding knowledge
3. It is an MVC architecture.

7) What are the Campaigns?

   A campaign is any marketing project that we want to plan, manage and track in salesforce

8) What is Lead?

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A Lead is any person organization or company that may be interested in our products sometimes leads are referred to as suspects. Leads are not yet customers.

9) What is the opportunity?

An opportunity is any potential revenue generated event that we want to track in sales force.

10) What is the cases?

A case is detailed description of a customer ask problem or question.

11) What is the solution?

A solution is a detailed description of a customer issue.

12) What is the forecast?

A forecast is best estimate of how much revenue we can generate in a quarter.

Or

A sales forecast is your best estimate of the revenue you can generate in a given time frame, such as a fiscal quarter

13) What is an Account?

Accounts are your organization's customers, competitors and partners.

14) What is sales cloud and service cloud? And Difference?

Sales cloud:

"Sales Cloud" refers to the "sales" module in salesforce.com. It includes Leads, Accounts, Contacts, Contracts, Opportunities, Products, Price books, Quotes, and Campaigns (limits apply). It includes features such as Web-to-lead to support online lead capture, with auto- response rules.

Sales Process flow
Sales Process flow starts from Leads i.e.

Creation of Leads --> Conversion of Leads once qualified (Potential Identified) --> Converting Lead to Account, Contact & Opportunity for New customer Or only Opp for an existing customer --> Update & maintaining the Opportunity details (Product, visits, closing date, etc) as per the customer follow up --> closing the Opp after the logical conclusion of the order.
Our Sales process flows through various stages in Sales funnel starting from Prospecting/design Assit --> Budget Price --> RFQ (Request for Quote) --> Tender/Proposal --> Negotiation/Review --> Order Agreed --> Closing of Opp (Won / Lost / No Bid / Cancelled).

Service cloud: Service Cloud" refers to the "service" (as in "customer service") module in salesforce.com. It includes Accounts, Contacts, Cases, and Solutions. It also encompasses features such as the Public Knowledge Base, Web-to-case, and Call Center

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15) In account deleted what happen contact?

If account deleted then contact, opportunity will also be deleted from sales force which is related to Account

16) Triggers and Order of Execution?

When a record is saved with an insert, update, or upset statement, the following events occur in order:

1. Old record loaded from database (or initialized for new inserts)
2. New record values are overwrite to old values
3. System **Validation Rules**
4. All Apex "before" triggers (EE / UE only)
5. Custom **Validation Rules**
6. Record saved to database (but not committed)
7. Record reloaded from database
8. All Apex "after" triggers (EE / UE only)
9. **Assignment rules**
10. **Auto-response rules**
11. **Workflow rules**
12. **Escalation rules**
13. Parent **Rollup Summary Formula** value updated (if present)
14. Database commit
15. Post-commit logic (sending email)

Profiles and users

1) What is the Profile?

A **profile** is a group/collection of settings and permissions that define what a user can do in **salesforce**. A **profile** controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visual force page access, Page layouts, Record Types, Login hours & Login IP ranges.

A profile is a object/field level access. A profile can have many users but a user can have only one profile.

Navigation:-Setup—Admin setup—manage users—Profiles

2) How many types of profiles?

Two types of profiles-

Standard profile (provided force.com)(S^3CRM). –we can't rename and delete

Custom profile (Override/own functionality)—we can be rename and delete.

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Standard profile:-

1. system administrator
2. Standard user
3. Solution manager
4. Marketing user
5. Contract manager
6. Read only

4) What does a profile control?

Profile controls the following:

1. Page Layouts:-
2. Field level security (view and edit)
3. Custom Apps
4. Tabs (standard and custom tab settings)
5. Record types
6. Login
7. Administrative general and object permissions (CURD).

Create:- Create permition allows to users read and create the records to the object

Edit:-edit permission allows read and modified the record of object.

Read:- read permission allows users to view records of object.

Delete:- This permission enables users to read,edit and delete the records from object.

.5) In Profile settings, what is difference between "Modify All Data" and "Modify All"?

Modify All Data: Create, edit, and delete all organization data, regardless of sharing settings.

Modify All: Give Read, Add, Delete permission to selected Object, Create permission is not included in Modify All permission.

5) What is the tab setting?

1. Default on:- When you setup tap visibility is default on, it would appear on the tap panel along with all other tabs.
2. Default off:- When you set up tap visibility is default off ,user will be still have access the tab but they will have to click on the + symbol at end of the all tabs
3. Tab hidden:- When you set up tap visibility is Hidden then that tab is not visible on tab panel and also not available in all tabs.

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5) What is the view all and modify all?

If we give view all and modify all permissions at a profile level then security controllers will not work these permissions overrides the security controls.

6) if i want object level access then what should i use from security model in Salesforce?

Permission sets and Profile.

7) In OWD can I change the grand access using hierarchy for standard object?

A) We can't change it for standard object however it's possible for Custom object.

8) What is mandatory while creating user role or profile?

A) Profile.

9) While setting OWD can we change/modify the setting of child record in case of master detail relationship?

A) No. Child records are controlled by parent object settings.

6) What is Field-Level-Security?

Field-level security settings let you restrict users' access to view and edit specific fields.

Navigation:- setup-Admin setup-Security controls-field accessibility

Note:- *1.* Field access settings can be defined using both FLS and page layouts .However the most restrictive field access setting of the two will always apply. *if a field is required on the page layout, but read only in the FLS settings, the field will be read-only.*

2. Hidding a field from a user using FLS also hides that from list views, search results and reports.

7) What is the User?

The people who have authenticated username and password to log on to sales force successfully. Each sales force user must be assigned a profile. We can't delete the user from the sales force.com but deactivate the user.

Navigation:-setup—admin setup—manage users—Users.

Mass Delete: To delete the users data go to setup-> Administration setup ->Data management ->Mass delete record, from there select the objects like Account, lead etc and in select the criteria and delete all record of that criterion related to particular object.

8) What is the permission sets?

A permission set is a collection of settings and permissions that give users access to

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various tools and functions. The settings and permissions in permission sets are also found in **profiles**, but permission sets extend users' functional access without changing their **profiles**.

Permission sets include the following:-

1. Object and field permissions
2. App permissions
3. Apex class access
4. Visual force page access
5. System permissions.

Navigation:-setup –Administration setup—manage users—permission sets.

9) By creating profile what is the required field?

Existing profile, By using clone method

10) By creating user what is the required field?

Profile

11) What is the difference between the profile and role?

Roles and Profiles are the two pillars in Salesforce.com. For a user in Salesforce.com It is mandatory to have a profile but not a role.

Profile:

To give the access to an object. If the object level permission is missing in the profile then the user will not be able to see the records of that object in Salesforce.com

To give access to Tabs, fields via FLS, General and Administrator settings.

Role:

A role is used to maintain the role hierarchy. Role hierarchy allows the managers to see the data of the user reporting to them.

Role hierarchy can be enabled or disabled for the custom objects. This will decide that data of managers will be seen by CEO or not.

12) Can you create user without assigning profile?

No, because while creating the user selection of profile is mandatory thing.

13) Can we assign many profiles for a single user?

No, we can assign single profile for single user.

14) Can a user be creating without role?

YES, We can create without assigning a role.

15) What is the need of custom controller in visual force as everything we can done by the

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Combination of standard controller plus extinction controller?

A) Sharing setting are applied on standard/extension controller by default in case if you don’t want to apply any sharing settings on code then custom controller is only one option.

17) If user doesn’t have any right on particular record and having only read level access at object level can he change the record owner?

    A) Yes, in profile there is setting for transfer record.

18) How to hide app setup and administration setup menu from user’s setup page?

A) In profile remove access view setup and configuration.

19) While creating new profile for user which existing profile should be copied?

    A) If the new user is not system administrator then copy system user profile.

20) What are the login hours and login IP ranges?

    A) Login hours: Login hours are set in an organization restrict the user’s who tries to login before or after login hours.

    B) Login IP ranges: IP ranges are used to restrict any login attempt is done from unknown IP address. Usually organization is maintaining login IP ranges.

21) Can a user change his own profile in salesforce ?

    Ans: No, a user cannot change change his own profile !!

22) Can a user change his own role?

    Ans: Yes this can be done !!

23) Reset security token option is unavailabel in set up. What could be the reason?

    Ans: If in the profile setting "login ip ranges" have been set up then the option of "reset security token" is uanvailbale.

24) How can you skip record type selection page(and take up default record type) while creating new record of a aprticular object ?

    Ans: just tickmark against the object by navigating to following :

    set up --> my personal information -- > Record type selection --> check against the required object.

25) How can you display different picklist values for picklist fields in different page layouts?

    Ans: This can be done using record types.

26) Can you create a new profile from scratch ?

    Ans: No, you have to clone from a existing profile and modify the settings as required.

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Sales force Application

1) What is App?

An application is a logical container for all of the objects, tabs, process and services associated with a given business function. An application is a group of tabs that work as a unit to provide functionality.

Navigation:-setup->build->crate->apps->new

2) How many types of Apps?

Two types: -1) custom app

2) service console app (we can display the all records in single screen.

3) What is the maximum size of Image in App?

Up to: - 20kb.

4) What are the standard apps provided in Sales force?

Sales, Call Center, Marketing, community, site.com.

Objects

1) What is object?

Objects are database tables that allow us to store data specific to organization in salesforce.com.

Navigation: - setup—build—crate—objects.

2) How many types object?

Two types: -1) standard– (account,contact,cases,lead,opportunity,-)

2) Custom object - (dep__c, student__c---etc)

3) What are the properties of custom object?

Custom objects are the heart of any application.

Custom fields

Relationship to other objects

Page layouts

We can track up to 20 fields for a object.

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4) What is the diff in In Deployment and Deployed?

In Deployment: - without testing only development is completed but not ready for deployment.

Deployment: - both development and testing is completed ready for deployment.

5) What are the standard fields in every object?

Created By	Last Modified By
Owner	Record Name

6) What is cross object formula?

Cross-object formulas can reference merge **fields** from a master ("parent") **object** if an **object** is on the detail side of a master-detail relationship. (**Cross-object formulas** also work with lookup relationships.) You can reference **fields** from **objects** that are up to 10 relationships away.

Tabs

1) What is Tabs?

Viewing, Editing and entering particular information for the object. Navigation:-setup—create—tabs

2) What are the types of tabs?

Custom tabs (look like a standard buttons):-Custom object tab display the data of your custom object in user interface tab. Custom object tab look and function just like standard tabs

Web tabs (enabled external web application and content with the salesforce.com window):- Web tabs display any web based application or web page in a Salesforce tab

Visual force tabs (embed vf pages) :-Visual force tabs display the data from visual force pages. Visual force tabs look and function just like standard tabs.

Lightning Page tabs: Lightning Page tabs allow you to add Lightning Pages to Salesforce1 and Lightning Experience.

3) How to hide the tab?

By using profile we go to tab settings choose tab hidden.

4) By using auto number I was created 1000 records with serial number then I want to change

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5 records name out of 1000 records name how to do?

A) First change the data type name from auto number to text then edit the name which records do you want then again change the data type from text to auto number.

Fields

1) What is Field?

A field is like a database column. Object fields store the data for our object records. To create custom fields to store additional information. They are two types of fields: -1) standard 2) custom

Navigation:-setup—create—objects—custom fields—new

2) What is the diff b/w Standard and custom fields?

Standard fields	Custom fields
We cannot delete	We can delete
We cannot create any more standard fields	We can create more custom fields
Don't have API name (Active)	Have API name (Active__c)

3) What are the data types limits By creating field?

Auto Number-{A-0000} Checkbox-(Boolean)

Currency – (18 digits) Email – (.com)

Number – (18 digits) Pick list- (lenth-40char; values-300)

Text- (255 char) Text area- (255char)

Text area Long- (32,768char) Text area rich(32,768,add images)

Text (Encrypted)- 175char

URL—255 char, but displayed 50 char only

4) What are the read-only fields/data types?

Formulae

Roll up summary

Auto number

5) How many ways we can make required the fields?

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By creating field:-Make a field required while creating it by checking the required check box, this makes that field is required for everyone in the organization.

Page layouts:- Particular page layout this field is mandatory and other it is not mandatory.

>The requirement will be like I want to make salary amount is mandatory in payment detail object for salary page layout but not for interview people in interviews salary page layout

Validation rules:-Make mandatory on particular condition.

6) What are the Return types in Formulae field?(C2D2NPT)

Currency checkbox date

Date and time Text Number and Percentage

7) Some important points in fields?

Changing the data type of existing custom fields is possible but doing so may cause data loss.

Deleting a custom fields remove both data and field.

Custom fields are stored 45 days of after deletion.

Records restore 15 days after that permanently deleted.

If data is lost any list view based on the custom field will be deleted and assignment and escalation rules may be affected.

8) What is formula field?

It is a read only field that derives its value from a formula expression what we define. The formula field is updated when any of the source fields change.

9) What are the Advantages of Formula Field?

Supported on standard and custom objects

Can reference fields on related objects called merge fields

We can enter 3900 char

Compile capacity-4000char

10) How many types' functions used in formula?

Date/time functions [date, date value, day-----etc]

Text functions [begins, contains, find, includes, is pickval---etc]

Math functions [abs, exp, floor, is blank, log, max, min----etc]

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Logical functions [and, or, case, if, not, is null----etc]

11) What is External ID?

These are used when we interacting with an external systems. It will act as a unique id .we can define 3 external fields per object.

Email , Text, Number.

12) Can you edit a formula field values in a record?

And: formula fields are read only and cannot be edited.

13) What is the unique id?

This is setting for the field that will prevent us from using the same value in multiple records for the unique field.

So if I create a 5 character text field and make it unique, and I create a record with the value "12345" I will not be able to create another record with that same value in the unique field. If I try to do so, I will get an error saying that the value is already in use.

14) Can we have duplicates in a external id?

NO.

15) What are the default standard fields creating an object?

Created BY

Last modified by

Owner

Name

16) How many fields we can display in related list?

A) Max 10 fields.

17) How many fields we can display in enhance list view (related list)?

A) 15 fields.

Object Relationships

1) What is Object relationship?

It can be set on the both standard and custom objects and are used to define how records in one object relate to records in another object.

2) Types of relationships?

Look up Relationship (40 within the object)(1:M)

Master-Detail Relationship(2 within the object)(1:M)

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Many-to-Many Relationship(1 junction object M : M)

Hierarchical Relationship(Role purpose)

Look up Relationship:- It is the relationship which is used to connect the two objects

2) What are the diff b/w Master Detail and Lookup?

Master Detail Relationship (1:M):-

1. We can create only two M-D Relationships in within the object.
2. If Parent deleted child automatically deleted.
3. We can create master-detail relationships between custom objects or between a custom object and a standard object (standard object must be the parent).
4. We cannot create master – detail relationship type fields directly **if records already exist.** Instead we have to first create Look up fields then fill all the records with that lookup filed. After that we can convert the lookup fields to master – detail relationship.
5. Rollup summary field is enabled under master detail relationship.
6. Supports cross-object workflow. You can configure a field update action to update a field in the parent record using a value from the child record.
7. The owner field on the detail object is not available and is automatically set to the owner

Of its associated master record. Custom objects on the detail side of a master –detail relationship cannot have sharing rules, manual sharing or queues as these require the owner field.

Lookup Relationship(1:M):-

1. 25 lookup relation relationships are allowed per object.
2. Child not affected in case of parent deleted.
3. We can create lookup relationship between any two objects, standard or custom.
4. Rollup summary field is disabled under lookup relationship.
5. Each child record has an owner and is not related to the parent record.

Navigation: set up to app setup to object to custom fields& relationships new to choose M-D Relationship

3) What is Many-to-Many Relationship?

You can use master-detail relationships to model many-to-many relationships between any two objects with junction object. A many-to-many relationship allows each record of one object to be linked to multiple records from another object and vice versa. ...

4) What is junction object?

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Junction objects are used to create many to many relationships between objects. If you take the Recruiting application example, you can see that a Position can be linked to many Candidates, and a Candidate can apply for different Positions. To create this data model you need a third object "Job Application" that links the 2.

5) In case any one parent deleted in M-to-M relationship what will be happened in child records?

Child is deleted, why bcz M-D relationship.

6) How many custom fields can be created on a object?

Ans - Initial limit is of 500 fields and if needed this can be extended to 800 by raising a case with salesforce.

6) What is Hierarchical Relationships?

Hierarchical Relationships:

This type of relationship is a special lookup relationship available only for the user object. It allows users to use a lookup field to associate one user with another that does not directly or indirectly refer to itself. For example, you can create a custom hierarchical relationship field to store each user's direct manager.

Self-relationship:
When an object has a lookup with itself, it is a self-relationship. A self relationship creates a tree diagram of the objects. For example, the account has a lookup on himself, called Parent Account.
On the user object a special self-relationship called the hierarchical relationship helps create superior roles such as supervisor, manager on user object. The hierarchical relationship is a self -relationship of the user object.

7) What is Roll-Up summary?

Roll up summary field can only be defined on the master object. While your formula fields calculate values using fields within a single record, roll-up summary fields calculate values from a set of related records, such as those in a related list.

Rollup summary field is a read only field.

8) Supported data types in Roll up Summary function?

MIN/MAX	SUM
Number	Number
Currency	Currency
Percent	Percent
Date/date time	--

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9) Say if we create a junction object A with masters B and C? Suppose if we try to delete the records in C what happen to child?

Child will also delete as per the properties of master –detail relationship.

10) Can we convert the lookup relationship to master relationship?

Yes we can convert the lookup relationship to master relationship if but populate the all existing fields

11) Can we create master detail relationship on existing records?

No, We cannot create master – detail relationship type fields directly if records already exist. Instead we have to first create Look up fields then fill all the records with that lookup filed. After that we can convert the lookup fields to master – detail relationship.

12) What is Self relationship?

When an object has a lookup with itself, it is a self-relationship. (Self relationship is nothing but creating relationship between two same objects. This self relationship is a lookup relationship to the same object.)

13) What is the Record Type?

You can display different page layouts and picklist values based on record types.

Create record types for various reasons, like for: Opportunities to differentiate your regular sales deals from your professional services engagements and offer different pick list values for each.

14) What is an sObject type?

Ans - sObject refers to any object that can be stored in force.com platform database. ex.

sObject s = new contact()

15) what we need to do for extending the limit of creating only 2 M-D relationships for custom object?

Create Lookup and make the lookup field mandatory.

Dependent pick list

1) What is dependent pick list?

A dependent pick list works in conjunction with a controlling field to filter its value.

Fields	Controlling	Dependency
Custom pick list fields	✔	✔

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Standard fields	✔	×
Multiple select pick-list	×	✔
Default value	✔	×

2) How many numbers maximum allowed in controlling fields?

300

3) Points?

FLS settings for a controlling filed and dependent pick list are completely dependent.

Remember to hide controlling fields whenever its correlating dependent fields is hidden.

Pick list values don't allowed duplicate values.

Navigation:- setup—customize—select object—click on fields—go to custom fields and relationships – click on filed dependencies—click on new button-----

Page Layouts && Record types

Difference b/w Record type & Page layouts?

1) What is Page Layout and some points?

Page layouts control the **layout** and organization of buttons, fields, s-controls, Visual force, custom links, and related lists on object record **pages**. They also help determine which fields are visible, read only, and required. **Use page** layouts to customize the content of record **pages** for your users.

2) What are Record types?

Record types used to display the different picklist values and page layouts to different users based on their profiles.

Profile +Record type=page layout Assignment.

3) Have you implemented record types in your project?

Yes, we have created record types and we have done page layout assignment also.

4) How to make record type as a default?

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By using profiles.

Go to the particular profile and by using record type settings we can make the record type as a default.

5) **What is a mini page layout?**

Ans - Mini page layout defines fields and related list to be displayed in hover detail and console tab.

Whenever you hover mouse over any recently viewed record the fields are displayed, related list is

not displayed(fields can be set in mini page layout).

Console tab fields and related list on the right hand side are also controlled by mini page layout.

6) **What is a VLOOKUP in S.F?**

VLOOKUP is actually a function in sales force which is used to bring relevant value to that record from another record automatically.

7) **What are formula and Rollup Summary fields and Difference between them? When should Rollup- Summary field enable?**

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

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

8) **what is audit field,what is the purpose of audit field?**

Created By, Created Date, Last Modified By and Last Modified Date are audit fields. Used to track when the changes are done to the records.

Validation Rules

1) What are validation rules?

Validations rules help improve data quality by preventing users from saving incorrect data. We can define one or more validation rules that consist of an error condition and corresponding error message. (Validation Rule is used to improve the data quality inserted by end user. If the input is fine, the record will be saved; if the input is in conflict with your Validation Rule, the error will be displayed and record cannot be saved.

)

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2) What is the difference between IS NULL and IS BLANK?

Both Determines if an expression has a value and returns TRUE if it does not. If it contains a value, this function returns FALSE.

ISBLANK (expression): The expression allows both number and text fields.

ISNULL (expression): Here the expression allows only number fields.

Only number fields

3) What are the Email Templates?

Text

HTML (using Letter head)

Custom (without using Letter head)

Visual force (we cannot send mass email template)

4) Email Template navigation?

Setup—Administration setup—Communication Templates—click on email template.

5) What is the difference between validation and workflow?

Validation: Validations rules help improve data quality by preventing users from saving incorrect data. We can define one or more validation rules that consist of an error condition and corresponding error message.

Workflow: Workflow rules allow us to automate the business processes for organization. Workflow will contain evaluation criteria and Rule criteria, whenever the rule criteria is true, then workflow will fire on single object.

6) How validation rules executed?

The validation rules run at the field level, so they are not affected by the UI. Any record that is saved in sales force will run through the validation rules.

7) How can you display an image as an field in a detail page of record?

Ans - This can be done using IMAGE function in formula field. A url of the image stored in document should be given in image function

Work Flow && Approval Process

1) What is the work Flow Rules?

Workflow rules allow us to automate the business processes for organization. Workflow will contain evaluation criteria and Rule criteria, whenever the rule criteria is true, then workflow will fire on single object.

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Workflow rules can help automate the following types of actions based on your organization's processes:

Tasks: Assign a new task to a user, role, or record owner.

Email Alerts: Send an email to one or more recipients you specify.

Field Updates: we can update a field of the same object or the fields of the parent objects which are at master side in master-detail relationship, only for master-detail parent objects we can update the field and for lookup we can't update.

Example: In my current project I created workflow for sending mail and updating the planned duration field under executes and support module. If we create task with status as new and once get completed task status updated as completed then we are sending mail to assigned to user and record owner and also updating the planned duration field based on difference between planned start date and planned end date.

2) What are the work flow actions?

1. New Email Alerts
2. New Field update
3. New Task
4. Out bound Messages

Email Alerts:-send to specific users using the e-mail templates. These users can be sales force users or other users.

Field update:- we can update a field of the same object or the fields of the parent objects which are at master side in master-detail relationship, only for master-detail parent objects we can update the field and for lookup we can't update.

Task:-Task can be assigned to users or record owners automatically when the rule criteria meet.

Out bound messages:-sends a securable API Message to a external systems.

3) How many types of evaluation criteria in workflow?

In the evaluation criteria section, we can choose the appropriate criteria that case application to trigger the work flow rule.

1. Created
2. created, and every time it’s edited(this is time independent)
3. created, and any time it’s edited to subsequently meet criteria

…1st and 3rd we can add time dependent triggers in these options

Created:- only run once when the record is created.

4) What are the rule criteria in work flow ?

Whenever rule criteria are met then trigger the workflow action.

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1. Criteria are met --- we can chose appropriate field name and operator equals value.
2. Formula evaluates to true. --- it will show formula window in this window write formula.

5) **What are the types of workflow?**
   1. Immediate workflows.
   2. Time Dependent workflows.

Immediate workflows:- The work flow actions will **execute immediately** whenever a record meets the condition specified in the work flow.

Time Dependent workflows:- The action which will be performed in future based on the any of the date field. To create time dependent workflow action we should create one time trigger. in time trigger we can give either days or hours with the maximum of 999 value and we can select either before or after.

In time dependent workflow mins,sec, date, date and time will not support.

? Only days and hours it will support.

6) **How many additional e-mail address we can entered in e-mail alert?**

Up to 5 e-mail alerts we can notified.

7) **When we can't add time dependent work flow?**
   1. Created, and every time it's edited.
   2. We can't add time triggers in active work flow.
   3. When workflow rule is deactivated and has pending actions in the queue.
   4. When the workflow rule is included in the package.

8) **How many rule criteria's we can add in single work flow?**

Up to 25

9) **How many fields we can create each action in single work flow?**

Up to 10

10) **What is the difference between workflow and trigger?**

Workflow:

Workflow is a automated process that faired an action based on evaluation criteria and rule criteria.

1. We can access workflow across the object.
2. We can't perform DML operation on workflow.
3. We can't query on database.

Trigger:

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Trigger is a piece of code that executes before or after a record is inserted or updated.

1. We can access triggers across the object and related to that object.
2. We can use 20 DML operations in one trigger.
3. We can use 20 soql's from data base in one trigger.

11) What are the criteria's of workflow and actions?

Criteria's: 1. Evaluation criteria
2.Rule criteria

Actions: 1.New email alert
2.New field update
3.New Task
4.Outbound message

12) What is the difference between event and task?

Task: represent a business activity such as making a call.

Event: Represent a calendar appointment event.

13) We have a time based workflow there is action scheduled to be executed .If we deactivated the workflow, scheduled action should be removed or not?

A) Even after deactivating the workflow, it 's action will not be removed. It's still in active in queue.

14) We have Time based workflow and there is action scheduled to be executed. Can we delete that workflow?

A) It is not possible to delete. If workflow is having any pending time dependent workflow actions.

15) How to clear time based workflow action queue?

A) We can clear time based workflow actions queue in two ways.
   1) Make the criteria false.
   2) Removing scheduled actions from queue.

16) While creating workflow on Task object what difference observed on available actions?

A) While creating workflow on task we can't find sending email option.

17) Max how many times time triggers will faire in workflow limitations?

A) Max 10 times it will faire.

18) Suppose if a record meets workflow criteria for time based workflow action, the action goes in queue later, before the time based action is triggered, the some records are get modified and the criteria previously meet is changed and now it doesn't meet the workflow criteria . what happens to the time based action pleased in queue.

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A) Simply the time based workflow action is removed from workflow queue and will not get faired.

19) Limitations (considerations) of time dependent workflow?

When defining time dependent workflows in Salesforce we have to use standard and custom date and date/time fields defined for the object.

We have to specify time using days and hours.

Also add actions to existing time triggers.

20) In which object workflows are stored?

Workflow

21) What is the difference between Created and every time edited to meet the criteria and Created and edited to subsequently meet the criteria?

If we select 'Created and every time edited to meet the criteria' whenever we create a record or edit a record if the criteria of the workflow rule meets then it will trigger every time.

If we select **'Created and edited to subsequently meet the criteria'** -

While creating the record criteria meets so that workflow will fire and while editing the record again criteria meets workflow won't fire (meeting the criteria to meeting the criteria)

While creating the record criteria doesn't meet so workflow won't fire and while editing the record workflow criteria meets then workflow will fire (not meeting the criteria to meeting the criteria)

Conclusion: Previous state of record should be not meeting criteria and current state of record should be meeting the criteria then only in current state workflow will fire.

22) **For which event we can't create time dependent workflow action?**

Created and everytime edited to meet the criteria.

23) How can you monitor future actions of time based workflow?

Setup --> administration set up --> monitoring --> time based workflow

24) There is a timebased workflow which will update one of the fields if the criteria meet. User submits the record with valid criteria, workflow triggered so that the field update is queued in the 'time based flow' queue which will fire after one day. If the user modifies the record which is submitted before the scheduled date, after modification, a record criteria is not meeting. Whether the field will be updated or not in schedule date?

Ans: It won't trigger in the schedule date because if we modify the record to not meeting criteria that queued field update will be removed from the 'time based flow' queue.

25) For the same scenario explained in the above question what happens when we deactivate or modify the criteria of the workflow to different criteria? Whether the field will be updated or not in schedule date?

Ans: Yes, It will trigger in scheduled date.

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26) Scenario: There are two workflow rules on the same object say namely wf1 and wf2. If wf1 fires then a field will be updated on the same object, if the field updated and due to this wf2 criteria meets then what will happen, wf2 will fire or not?

Ans: It won't fire. To fire wf2 we should enable 'Re-evaluate Workflow Rules' checkbox of the field update which is there in wf1.

27) What is recursive workflow rule? How to avoid recursive workflow rules?

Ans: Whenever we enable Re-evaluate Workflow Rules after Field Change checkbox in the Field Update of a workflow rule, due to this field update other workflow rules on the same object will be fired if the entery criteria of those workflow rules satisfied.

Incase, in other workflow rules also if we enable Re-evaluate Workflow Rules after Field Change checkbox in the Field Update recursive workflow rules will come in some scenarios.

We can take two steps to avoid recursive workflow rules –

For the workflow Evaluation Criteria if you choose created, and any time it’s edited to subsequently meet criteria option, we can avoid recursive workflow rules.

If you don't enable Re-evaluate Workflow Rules after Field Change checkbox in the Field Update of a workflow rule we can avoid.

28) A workflow already exists on object. Now user want to add time dependent workflow action to it but not able to get an option to select time dependent action. What might be issue?

Ans: Evualation criteria is set to “created, and every time it’s edited”

29) Can you give me situation where we can you workflow rather than trigger and vice versa?

Ans:

If you want to perform any action after some action, we can go for Workflow Rule.

If you want to perform any action before and after some action, we can go for Trigger.

30) We have a time based workflow and there is action scheduled to be executed. if we Deactivate the workflow, scheduled actions will be removed from queue or not?

Ans: Even after deactivating the workflow, its action will not be removed. It’s still active in queue.

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31) **We have time based workflow and there is action scheduled to be executed. Can we delete that workflow?**

It is not possible to delete the workflow when the workflow is having any pending time dependent actions.

32) **How to clear time based workflow action queue?**

Ans: We can clear time based workflow action queue in two ways they are

1. Make the criteria false.
2. Removing scheduled actions from the queue.

33) Can we update parent record with workflow field update?

Ans: Yes, only if relationship is master detail. If it is look-up relationship, then it is not possible.

34) **User1 is associated with profile "P". If i create a permission set and assign it to User1, now will the Permission sets which we assigned overrides the existing profile "P".**

No. Permission set is always used for extending the profile permission. It's not used to override the Profile permissions.

35) **Difference between workflow and process builder?**

You can use the Process Builder to perform more actions than with workflow:

Create a record
Update any related record
Use a quick action to create a record, update a record, or log a call
Launch a flow
Send an email
Post to Chatter
Submit for approval
Call apex methods
But the process builder doesn't support outbound messages.

Workflow does only 4 actions

Create Task
Update Fiel
Email Alert
Outbound Message

APPROVALS

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1) **What is the approval process?**

If record meets the criteria then by clicking on submit for Approval button user can submit the record for approval (Note: Approval history related list should be displayed on the record detail page)

2) **What are the different ways to create a Approval process?**

   1. Use jump start wizard.
   2. Use standard setup wizard.

Use jump start wizard:- The Use jump start wizard is provided as **quick way to create** simple approval process that have a single step.

Use standard setup wizard:- Use standard setup wizard we can create **complex approval process**.

Example : In my current project I created one unanimous approval process in one of my project module in this approval process we has one committee for approval the request, project manager will submit for approval then all committee members will decide that particular project should approve or not depends on risk and impact of project. If we process this project under that particular release if risk and impact is high then committee members will reject the approval request, if due to this project risk and impact is less under this particular release then committee member will approve the project. Before get approve the approval request all committee members should approve the approve request. Once all committee members should approve then project approval status will approve as Approved.

3) **What is the dynamic Approval process?**

Dynamic approval process is the automatic approval process.

4) **What is the difference between workflow& Approval process?**

Workflow	Approval
kflow rules are triggered when a record is saved.	roval processes are triggered when a user clicking on the "Submit for Approval" button.
kflow consists of single step and multiple actions.	roval process consists of multiple steps. Also different action is taken based on

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	whether the record is approved or rejected.
kflows can be modified or deleted.	approvals some attributes cannot be modified. Processes must be deactivated before approvals can be deleted.

5) After activating the approval process, I want to add one more step. Is it possible?

Ans: It's not possible, to add one more step deactivate the approval process and clone the deactivated approval process and add the new steps.

6) In which object all Approval process are stored?

Ans: Approval

7) Is it possible to create parallel approval process (ability for multiple user to approve or reject a record)?

Ans: Yes. Parallel approval process allows specifying (upto 25) multiple approvers. The approver setting could be set to unanimous, or first action. In unanimous parallel approval process, all approvers must approve a request, before it is considered as approved.

8) What is the daily email alerts limit per standard salesforce license for workflow and approval process? And what is the overall daily organization limit?

Ans: Daily email alert for approval process and workflow are 1000 per standard Salesforce license.Overall daily organization limit for workflow and approval process email alert is 2000000 (2 million).

9) Is it possible to start approval process after records is created in salesforce without clicking on submit for approval button?

Ans: Yes. Process builder or apex trigger can be used to initiate approval process when record is created.

10) How we can achieve dynamic approval process like approve of position record should be user defined in hiring manager field of position?

Ans: It is possible through apex triggers because in standard approval process, you need to define approver while creating approval process.

11) Is it possible to skip steps in approval process?

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Ans:Yes.

In processes that have steps that are optional depending on criteria, use the skip step feature.

To skip steps, use filter criteria or formula, then choose what should happen to records that do not meet the criteria. The options are:

- Approve Record (approves the request and performs all final approval actions).

- Go to Next Step (skips this step and goes to the next step).

12) **Can we implement multilevel approval process in salesforce?**

Ans: Yes. Define different steps in approval process.

13) **What are approval process?**

Ans: Salesforce supports wizard based easy to configure approval process. After an object is selected, the wizard guides the user through a step-by-step setup. Approval process is triggered when a user clicks on the "Submit for approval" button.
The approval process consists of the following steps -

- Process definition
- Initial submission actions
- Step definitions
- Final Rejection actions
- Final Approval actions

Final Recall actionsIn workflow rule,action is triggered when a record meets an evaluation criteria. Workflow rules definition does not impact existing records. Workflow rule gets applied to new record creation or edits.

ORGANIGATION WIDE DEFAULT SETTING (OWD)

1) **What is the OWD?**

Organization wide default setting (OWD) is the base line level of access to data records for all users in the organization.

OWD is the record level access.

2) **What is default setting for campaign in OWD?**

PUBLIC FULL ACCESS:- All the users in the organization can **view, edit, delete, transfer, report** on all campaign records.

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3) **What is default setting for Lead& Cases in OWD?**

Read/Write/Transfer:- All the users in the organization can **view, edit, transfer, report** on all lead or cases records.

4) **What is the default setting for opportunity& solution in OWD?**

PUBLIC Read/write:- All the users in the organization can **view, edit, report** on all the records.

5) **What are the settings available for all custom and standard objects in OWD?**

1. Private
2. Public Read only
3. Public Read/write

Private:-Only the record owner and users above that role in the hierarchy can view, edit and report on those records

Public Read only:- All users can **view and report** on every record but they cannot edit them here only the record owner and user's above that user's role in the role hierarchy can edit the records.

Public Read/write:- All the users in the organization can **view, edit, report** on all the records.

6) **What are the settings available for user object in OWD?**

1. Private
2. Public Read only(these is default setting)

7) **What are the settings available for price book in OWD?**

1. **Use (default setting)**
2. View only
3. No access

USE:- allows all users to access the price book information as well as using the price book configuration for opportunity with products.

View only:- allows all users to access the price book information but not to use that price book details for opportunity with products.

No access:- restrict users from accessing information for price book and price.

8) **What are the grant access using hierarchies?**

By default sales force uses role hierarchy to automatically grand access to users above the record owners in the hierarchy. We cannot edit grant access using hierarchies for standard objects and can edit grant access using hierarchies' check box for custom objects.

9) **What is the controlled by parent?**

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When controlled by parent is set on any object a user can perform an action (such as view, edit or delete) on the record based on where they can perform that same action on the parent record associated it.

1 child records in lookup relationship can't controlled by parent.

10) In profile level given view all and modify all then security control working or not?

OWD setting are DOES NOT work.

10) Manager doesn't see below user's records how can you do?

In OWD disable the grand access.

11) Which type level of access is available in sharing rules?

1. Read only
2. Read/write

12) Who are available in sharing rules shared options?

1. Public Groups
2. Roles
3. Roles and subordinate

13) What is the role?

A role control the level of visibility that user's have an organization data.

14) Show in tree view what are the options?

Expand all: see all roles

Collapse all: only top level roles

15) In list view how many roles we can see?

More than 1000 roles

NOTE: 1. we can create up to 500 roles for organization

2. Every user must be assigned to a role.

16) What is sharing rule?

Using Sharing rule we can give automatic exceptions to OWD. Using sharing rules we can extend the record level access. By using sharing rules we can grand access read/write permissions to users.

Sharing rules are two types

1. Manual Sharing.
2. Automatic Sharing.

17) How many ways can we share a record?

A) 1. Role hierarchy.

2. OWD.

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3. Manual Sharing.

4. Criteria based sharing.

5. Apex sharing.

18) Can we use sharing rules to restrict data access?

No. sharing rues can't be restrict data access.

18) Is it possible to create sharing rules for detail object?

No, we can't create sharing rules for detail objects(only m-d relationship detail object doesn't have owner for lookup having owner) because they don't have owner field.

19) What are standard reports?

Standard reports in Salesforce those provided by Salesforce.com. This type of reports we can't be deleted and used primary for creating standard reports.

20) Can you create sharing rules for detail objects?

Ans - No. Detail objects cannot have sharing rules as the detail objects do not have owner field with them.

21) Which all field data types can be used as external ids?

Ans - An external id can be of type text, number or email type

22) What is custom report?

Custom reports in Salesforce are those created by user with specific criteria these type of reports can be deleted, edited and stored in personal folder.

23) Salesforce Security

System level security

Authentication.

Authorization.

Social Sign – on.

Application level Security

Object level Security (Permission sets and profile).

Field level Security (Permission sets and profile).

Record level Security (Owd,Role hierarchy and sharing rule).

24) When Share button will be available on record detail page?

Ans:

25) How to check whether user has access to a particular record or not?

Ans:

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Query “userRecordAccess” to check whether has access to record or not.

For example:

SELECT RecordId, HasReadAccess, HasTransferAccess, MaxAccessLevel, HasAllAccess, HasDeleteAccess, HasEditAccess FROM UserRecordAccessWHERE UserId = “005xxxxxxxxx”AND RecordId = “001xxxxxxxx”

HasAllAccess Indicates whether a user has all access–read, edit, delete, and transfer—to the record (true) or not (false).

26) If object-level permissions conflict with record-level permissions, then what will happen?

Ans:

If object-level permissions conflict with record-level permissions, Salesforce applies the most restrictive settings.

- If a user’s profile grants him update permission on an object, he will not be able to edit records of that type owned by other users unless read/write record-sharing has been granted.
- If read/write sharing has been granted, a user whose profile does not specify update permission will not be able to edit records of that type.

27) .Can you override profile permissions with permission sets(i have defined some permissions in profile,i am trying to use permission sets for the same object,can i override permissions for a particular object in the permission sets over to the profile?

Ans: No. Permission Sets are used only to extend the Profile permissions. It never overrides.

28) I want to have read/write permission for User 1 and read only for User 2, how can you achieve?

Ans: Create a profile with read and assign to user 1 and user2 and Create a Permission Set with read/write and assign it to User 1.

29) I have an OWD which is read only, how all can access my data and I want to give read write access for a particular record to them, how can i do that?

Ans: All users can just Read the record.

Create a Sharing Rule to give Read/Write access with "Based on criteria" Sharing Rules.

30) What is the difference between role hierarchy and sharing rules?will both do the same permissions?

Ans: Role Hierarchy states that higher hierarchy person can see lower hierarchy person records.

Sharing Rule is used to extend Role Hierarchy.

31) How to provide security for Meta-Data files (Schema)?

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Ans: Using Profiles and Permission Sets.

32) **How to give permissions to two fields for different users who belongs to different profiles?**

Ans: Permission set

33) **What is Grant Access Using Hierarchies?**

ANS:In OWD we have Private but your higher position persons should see that time we go for Grant Access Using Hierarchies.

34) **How many users are there in your project salesforce instance?**

ANS:1000 (It will depends upon the number of licenses taken by the client, it will be like upto 4000 like that based on the client)

35) **What is manual sharing?**

ANS: Manual sharing is to share a record to a particular user manually.

Go to detail page of record and click on manual sharing button and assign that record to other user with Read or Read/Write access.

Manual Sharing button enables only when OWD is private to that object.

36) **Can you tell the difference between Profile and Roles?**

ANS: Profiles are used for Object level access settings.

Roles are used for Record level access settings.

37) **Can you use sharing rules to restrict data access?**

Ans No, sharing rule can only give wider access to data it cannot restrict data access.

38) **Can you set default access in Organization wide default for detail objects (detail object in case of master detail relationship)?**

Ans - No, Detail object will always have default access as 'Controlled by Parent' and it cannot be changed.

39) **Can standard object appear as detail object?**

Ans - No, you cannot have standard object as detail object in case of master detail relationship.

40) **If user doesn't have any right on particular record and have only read level access at object level. Can he change the record owner?**

Yes. In profile, there is setting for "Transfer Record".

41)

REPORTS& DASHBOADRS

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42) **What is the report?**

Reports are summaries and analyses of object data which we can display or print.

43) **What is the dashboard?**

1. Dashboards are graphical representation and visual presentation of reports data in Salesforce and we can add up to 20 reports in a single dashboard.
2. Without reports we can't create dashboards.
3. Dashboards are generally graphical representation of Summary and matrix reports.

44) **What is report folder?**

Report folders section allows us to choose the reports that are stored in specific folder.

We can't save reports to the **standard report folders**, we can only save reports to **my personal custom reports folders, unified public report folder** or any custom report folder.

Unified public report folder:- 1.Read only 2.Read/write

Note for reports:

1. Deleted reports and dashboards can be retrieved from recycle bin.
2. We cannot use the reports search functionality to search for standard reports.

45) **What is the difference between standard reports and custom reports?**

Standard reports:

Standard reports in Salesforce are those provided by Salesforce.com. These type of reports can be deleted and used primarily for creating custom reports.

Custom reports:

Custom reports in Salesforce are those created by user with specific criteria. These type of report can be deleted, edited and stores in personal folders.

46) **What are the types of reports?**

Repots are classified in to 4 types.

1. **Tabular report**
2. **Summary report**
3. **Matrix reports**
4. **Join Reports.**

Tabular report:- 1.tabular reports provides a simple listing of data without subtotal
2.list with a single grand total

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Summary report:- 1.provides a listing of data like a tabular ,plus grouping and subtotaling of data.

Matrix reports:-1.provides totals for both rows and columns.

2. Data is arranged vertically and horizontally in tables like excel format.

Note:-1. Tabular reports cannot be used as source report for dashboard components.

3. Summary reports, matrix reports can be used as the source report for dashboard components

47) What are the types of run reports?

1. Run reports now
2. Schedule run reports

48) What are the e-mail reports in scheduled run reports?

1. To me (send to sfdc users)
2. To me and/or others (send the sdfc& other users).

49) What is the frequency field select in schedule report?

1. daily
2. weekly
3. monthly

50) What is the difference between ‘printable view’ and ‘export details’ button on reports?

Printable view:- formatting, grouping and subtotals are display.

Export details:- formatting, grouping and subtotals are lost.

51) Each dashboard how many components having?

20

52) What are the types of dashboards?(HV LP DF GMT VS)

1. horizontal bar chart
2. Vertical bar chart
3. Line chart
4. Pie chart
5. Donut chart
6. Funnel chart
7. Gauge
8. Metric

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9. Table
10. Visual force page
11. Scatter chart

Note: The components of the dashboard that use the grand total is **Metric and Guage**

53) **What are the different dashboard components?**

Salesforce dashboards have some visual representation components like graphs, charts, gauges, tables, metrics and visual force pages. we can use up to 20 components in single dashboard.

54) **What are the types of Column level controls?**

Up to 3 levels of columns.

55) **Explain dynamic dashboards?**

Dynamic dashboards in Salesforce display set of metrics that we want across all levels of your organization.

Dynamic dashboards in Salesforce are created to provide security settings for the dashboards in Salesforce. We may have a requirement in an organization to "view all data" by every user in an organization according to their access we have to select run as logged in user.

There are two setting options in dashboards.

They are

1. Run as specified user.
2. Run as logged in user.

We can build 3 dynamic dashboards .

56) **How many records we can display on page for particular reports?**

We can display up to 2000 records on a page. If more records are there to display we cannot see those through user interface. If you export the records to a excel sheet then you can export all records.

57) **What is a bucket field in the report?**

In Salesforce reports, bucket field are used categorized report records. When we use bucket field in reports there no need of creating formula or a custom field.

Bucket field for Reports in Salesforce is used to group values to the name we specify. It can group only the below data types fields

1. Picklist
2. Number
3. Text

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58) Which permission is required to set the running user other than you in dashboards?

The user must have "View all data" permission is required to set the running users.

59) Who can access drag and drop dashboards?

User who has permissions in managed dashboard can access drag and drop dashboard.

60) Who can run reports?

User with permission run report and access to report folder can only run the report.

61) What is trend report?

Trend reports in Salesforce are those which display historical data. Trend reports are used to analyze which fields contains data that we want to leave out.

62) What are custom repot types?

Custom report types in Salesforce allow us to build framework in report wizard

When creating custom reports. This custom reports can be created between standard and custom objects.

63) Who can run reports?

Users with permission "Run Report" and access to report folder can only run the report.

64) Is it possible to delete reports using data loader?

No. It is not possible to delete reports using data loader.

65) What is the use of "floating report header"?

Floating report headers enables us to display the column header visible on each page when we scroll the report page.

66) How to enable "floating report header"?

To enable floating report header in Salesforce go to setup=>Customize=>Reports and dashboards=>User Interface settings=>Click on enable floating report header.

67) What is analytical snapshot in Salesforce.com?

Analytical snapshot in Salesforce are used to create reports on historical data.

68) How many blocks we can create for join reports?

5 blocks.

69) How many maximum groupings we can do for summary, matrix and join reports?

3 groupings.

70) Is it possible to schedule a dynamic dashboard in Salesforce?

No, it is not possible to schedule a dynamic dashboard in Salesforce.

71) What all things are not supported in joined reports?

The following items aren't supported in joined reports, and aren't converted:

- Bucket fields

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- Cross filters
- The Rows to Display filter

72) **Can we create a formula type in reports?**

Yes.

Formula are not available in tabular reports but available for other report types.

Formula can be only in number, currency and percent format.

73) **We can add report chart in page layout?**

Sol: Yes we can add report charts in page layout.

Click Edit next to the page layout. ==> Click Report Charts. In the Quick Find box, type the name of the report and click to find and select the report chart. Drag the chart to a new or existing section of the layout.

Groups& Queues

74) **What is the Groups?**

Groups are set of Users. They contain individual users, other groups, the users in the particular role, the users in a particular role plus all of the users below that role in the hierarchy.

75) **What are the types of Groups?**

1. Public Group:- only administrator can create, everyone can be used in organization
2. Personal Groups:-each user can create groups for their personal.

Public Groups are set of users and they are used in a

- Sharing Rule
- Giving Access to Folders
- Email alerts

Public groups made up of any combination of

- Users
- Roles
- Roles and Subordinates
- Public Groups

76) **How can you restrict in your group higher authority not visible lower user data?**

Disable grand access using hierarchy in your group.

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77) What is the queue?

Queues allows group of users to manage a shared work load more effectively. We can create queues for cases, leads and custom objects.

Note:1. Whenever we create a case queue, lead queue sales force automatically generates a case list view, lead list view to enable to access the records in the queue.

2.Case records can be assigned to queues manually Or automatically using assignment rules.

71) On which objects can you create Queues?

Ans - Queues can be created on two standard objects (Lead and case) and also on all custom objects.

Data loader & Import wizard

1) What is the use of IP ranges?

To avoid activation process and to avoid security token.

2) What is the use of security token?

By using security token we can integrate with 3rd party tool (like data loader,Force.com IDE(Eclipse))

3) What is the data loader?

Data loader is an application for the bulk import or export of data. Data loader is used to insert, update, upsert (insert, update), delete or export sales force records. With Dataloader we can process maximum of 5 million records. Most of the time we use only Dataloader. Default batch size of the Dataloader is 200.

4) What is the import wizard?

Import wizard is a web based tool to process bulk records.
With import wizard we can process maximum of 50,000 records.
In import wizard we can't see few objects (ex: if there is master detail relationship between two objects then child object we can't see).

5) Difference b/w Data loader & Import wizard?

data loader	Import wizard
pports all standard and custom objects	ıpports account, contact, solution lead and all custom objects
pport up to 5million records	pports up to 50000 records

Edit with WPS Office

ow duplicate records	esn't allow duplicate record
having batch size.	oesn't have batch size.
oesn't support schedule export.	support schedule export.
require installation	doesn't require installation.

6) **Difference b/w Export & Export all?**

Export: Extract all the records from sales force into CSV (Comma Separated Values) files.

Export all: Extract all the records from sales force object records including recycle bin data also.

7) **Difference b/w Insert & Upsert?**

Insert: inserting records in to sales force.

Update: Updating the existing record in to sales force.

8) **If I am entering email id, password and security token but showing error?**

Due to in **SERVER HOST** url is wrong

9) **How to give the blank value as the field value to the record using data loader?**

Use the setting **"insert null values"** in the data loader settings.

10) **What is the format of the file identified in data loader?**

Data loader support only csv file because of its size is less than xlsx file.

11) **What are log files in data loader?**

Log files are error and success files that are generated automatically in data loader for the fallowing operations.

Insert

Update

Upsert

Delete

Note: log files cannot be generated automatically for the Export operation in data loader.

12) After Data Export using DataLoader, Some time it appears that data is on New Line (Carriage Return) when we open CSV file in Microsoft Excel. For example , Address Data separated on different lines. How can we override this problem ?

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Ans: Excel does all sorts of "useful" things when it opens a CSV file. It will re-format dates, strip leading zeros, corrupt record IDs (if you have them in your report), and as explained it will also break line. Best way as per my experience till date is, Upload document to Google Drive. Export document back from Google drive as Excel.

13) How do you import Converted Lead into Salesforce from Legacy System?

Ans: Fields we need for importing converted leads are "ISCONVERTED" , "CONVERTEDCONTACTID" , "CONVERTEDOPPORTUNITYID" and "CONVERTEDACCOUNTID".

Step 1 : As above fields are not editable, we have to contact Salesforce Support to enable Audit fields. Enabling Audit fields means we can edit few Readonly fields like created date and above lead fields.

Step 2 : Import Account, Contact and Opportunity from Legacy system to Salesforce.

Step 3 : If you imported account, contact and opportunity in Step 2, Salesforce automatically generates Unique ID. We need that unique Id to insert Converted Lead. So Export Account, Contact and Opportunity, which is inserted in Step 2 from legacy System.

Step 4 : Create CSV File with All lead information with ISCONVERTED=TRUE and CONVERTEDCONTACTID, CONVERTEDOPPORTUNITYID, CONVERTEDACCOUNTID. CONVERTEDCONTACTID, CONVERTEDOPPORTUNITYID and CONVERTEDACCOUNTID should correspond to Ids generated by Salesforce for Contact, Opportunity and Account which will be related to converted lead.

Step 5 : Once CSV is properly created with all required Data, Insert it using Data Loader.

Note : We cannot convert existing lead using this process. Leads must be inserted with these four fields. If you try to update lead it will not give you option to edit above fields.

14) What is the filed mapping file format of the data loader?

SDL("*Salesforce* Data Loader" file of Field mapping*)*

15) Maximum batch size of data loader?

10,000 records and minimum 1 record.

16) What is default batch size if we enable bulk API?

2,000 records.

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17) What is Bulk API?

The Bulk API is used to upload high volume of data (millions of records). The Data Loader uses the SOAP-based Web Services API by default. To use the Bulk API instead, check "Bulk API" checkbox in apex data loader settings page. When you check Bulk API checkbox, increases the batch (upto 10000 records) which is usually 200 in normal upload.

18) Is there is any option to specify time zone for uploading records in apex data loader?

Yes. Present in settings page of apex data loader.

19) When "Hard Delete" button will be enabled in apex data loader?

When you enable Bulk API setting in apex data loader.

20) Can We Bypass The Required Fields In Data Loader?

Inserting the records through Data loader Required fields **cannot** be skipped. If you have Required fields in your object make sure you have values in the CSV for those fields as well. There is no setting to by bass the required field check. although you can turn off the validation rules simply uncheck the Active check box.

21) **In Data loader using upsert operation can u do update a record if that record id is already exist in page and if updated that record then can u update 2records with having same id and if not updated 2 records then what error message is given?**

It is not possible to update records with same id in a file using upsert operation. It will throw "duplicate ids found" error.

22) What is the lead conversion?

When you convert a lead, sales force create a new record for account, contact and opportunity objects, where the account record name field will contain the company name field value from the lead, and the contact record name field will be populated from the name field with in the lead record.

23) What are the assignment rules?

Assignment rules are used to automate organization's lead generation and support processes.

1. Lead assignment rules
2. Case assignment rules

Lead assignment rules: specify how leads are assigned to users or queues as they are created manually, captured from the web.

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Case assignment rules: Determine how cases are assigned to users or queues as they are created manually, using web to case.

24) What are the Escalation rules?

Create case escalation rules to escalate cases automatically if they are not resolved within a certain period of time.

Note: We can create escalation rules for only “cases” object.

25) What is the web to case?

Gather customer support requests directly from your company’s website and automatically generate up to 5,000 new cases a day with Web-to-Case. This can help your organization respond to customers faster, improving your support team’s productivity.

1. Create custom case fields, if needed.
2. Create a default email template for the automated notification that will be sent to your customers when they submit a case.

26) What is the web to lead?

Web-to-Lead, you can gather information from your company’s website and automatically generate up to 500 new leads a day.

27) What is the email to case?

Salesforce.com can automatically create a case when an email is sent to one of your company’s email address. This Email to case functionality auto-populates case fields from the content of each email.

28) What are quotas?

Quotas are used to set target sales goals for forecast uses. this can allow organizations to establish greater accountability for meeting sales expectations.

29) How are forecasts implemented in sales force?

3-Different versions

1. Forecasts (winter 12 releases)
2. Customizable (futer request)
3. Forecasts classic (prior to winter 12 releases)

UST Global

1) What is chatter?
   A) Salesforce allow you to collaborate with people each other in your organization. You can connect with your co employees and you can share your information securely in real time. And also you share your comments, add images and you can like other comments/posts.
2) Can we use tabular report in dashboard?
   A) Use a Tabular Report in a Dashboard. You can use a tabular report as the source report for a dashboard table or chart component, if you limit the number of rows it returns. Set the Row Limit to 10, 25 , or Custom . ... Charts are grouped by name.

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3) Recycle bin houses deleted data for how many days?
   A) 15 days
4) What all are the operations you have used in data loader?
   A) Data Loader is a client application for the bulk import or export of data. Use it to insert, update, upsert, delete, or export Salesforce records. When importing data, Data Loader reads, extracts, and loads data from comma separated values (CSV) files or from a database connection. When exporting data, it outputs CSV files.
5) What is import wizard?
   A) The Data Import Wizard makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects. You can import up to 50,000 records at a time.
6) What all are the tools available in the market for data migration?

A)
More number of tolls are available in the market For data migration.
Ex: like

1. Import Wizard Salesforce
2. Apex Data Loader
3. Jitterbit Data Loader
4. Dataloader.io
5. Force.com Excel Connector
6. Informatica Cloud Data Wizard

7) How to set the batch size while data loading?
   A) In data loader under setting we can set batch size in batch size column.
8) What is the difference between Export and Export All?
   A)

Export: Extract all the records from sales force into CSV files.

Export all: Extract all the records from sales force object records i.e. including records in recycle bin also.

9) What is the difference between change set & eclipse way of deployments?

1. Via eclipse we can deployment but Eclipse will not keep a track of the Classes and Pages which were deployed earlier. On the Other hand if we use Change Sets then all old deployments will be tracked.
2. A change set can only be moved between a live site and its sandbox(Means connected orgs). Eclipse can be used to move between any orgs like live site and developer org (no need connection).
3. When deploying by using change set, it runs all tests of apex code. If you have low code coverage(less then 75%) you will not be able to deploy it will fail every time while with Eclipse you can push code without code coverage.
4. Change Sets gives you a way to 'redeploy' back to a previous configuration and you can view the code/settings that were part of an historical Change Set. Eclipse doesn't offer that unless you always remember to use a source control system and commit each update.

10) What all are the editions available in Salesforce?

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Professional Edition

This edition is designed for businesses who need full-featured CRM functionality. Professional Edition includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.

Enterprise Edition

This edition is designed to meet the needs of large and complex businesses. Enterprise Edition orgs get advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to the web services API, so you can easily integrate with back-office systems.

Unlimited Edition

This edition is Salesforce's solution for maximizing your success and extending that success across the entire enterprise through the Force.com platform. Unlimited Edition customers benefit from new levels of platform flexibility for managing and sharing all their information on demand. Unlimited Edition includes all Enterprise Edition functionality plus Premier Support, full mobile access, unlimited custom apps, increased storage limits, and more.

Developer Edition

This edition provides access to the Force.com platform and API. A Developer Edition org allows developers to extend the Salesforce system, integrate with other applications, and develop new tools and applications. Developer Edition provides access to many of the features available in Enterprise Edition orgs.

11) Explain different types of licenses available in Salesforce?

Salesforce - This is the most commonly purchased license. Designed for users who require full access to standard CRM and Force.com App Exchange apps. Users with a Salesforce user license are entitled to access any standard or custom app.
Salesforce Platform - Designed for users who need access to custom apps but not to standard CRM functionality. Users with a Salesforce Platform user license are entitled to use custom apps developed in your organization or installed from Force.com App Exchange. 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. Salesforce Platform users can also use Connect Offline.

Salesforce Platform Light - Designed for users who need access to custom apps but not to standard CRM functionality. Users with a Salesforce Platform Light user license are entitled to the same rights as Salesforce Platform users, except the amount of times the user can log in is limited monthly.

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

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objects, and they are limited to read-only access to the Accounts and Contacts objects.

Force.com - Free - Designed for users who need access to one custom app but not standard CRM functionality. Force.com - Free 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 do not have access to Accounts and Contacts objects.

Customer Portal Users

Customer Portal Manager Standard - Designed for contacts who are allowed to log in to your Salesforce Customer Portal to access customer support information. Users with a Customer Portal Manager Standard license can be associated with the Customer Portal User profile or a profile cloned and customized from the Customer Portal User profile. This enables them to view and edit data they directly own or data owned by or shared with users below them in the Customer Portal role hierarchy. Users with the Customer Portal Manager Standard license can access custom objects depending on their profile settings and can access Salesforce CRM Content if they have a Salesforce CRM Content feature license or a customized profile.

Overage Customer Portal Manager Standard - Verbatim from Chet Chauhan (customer portal licensing), "From a functional point of view these licenses are exactly the same as the named user customer portal licenses, only difference is that we charge by login and have an overage fee if they go over the number of logins they purchased."

Customer Portal Manager Custom - Designed for contacts who are allowed to log in to your Salesforce Customer Portal to access customer support information. Users with a Customer Portal Manager Custom license can be associated with the Customer Portal Manager profile or a profile cloned and customized from the Customer Portal Manager profile, which enables them to view and edit data they directly own and view and edit cases where they are listed in the Contact Name field. Users with this license can access Salesforce CRM Content if they have a Salesforce CRM Content feature license or a customized profile.

Partner Portal Users

Bronze Partner - Users with a Bronze Partner license can access Documents and My Account Profile, but have no storage space.
Silver Partner - Users with a Silver Partner license can access the Documents tab, My Account Profile, Leads, and Approvals, and have 2 MB of data storage space. Access to Salesforce CRM Content is determined by feature license and profile.
Gold Partner - Users with a Gold Partner license can access the Documents tab, My Account Profile, Leads, Custom Objects, Approvals, Accounts, Cases, and Opportunities, and have 5 MB of data storage space. Access to Salesforce CRM Content is determined by feature license and profile.

Feature Licenses

You may have more than one type of feature license available to assign to the users in your

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organization. A feature license entitles a user to an additional Salesforce feature, such as Marketing or Connect Offline.
In Professional, Enterprise, and Unlimited Editions, you can enable additional features:

- Marketing User
- Offline User
- Apex Mobile User
- Salesforce CRM Content User (only appears if you purchased Salesforce Mobile feature licenses)
- Salesforce CRM Content User (only appears if you purchased Salesforce CRM Content feature licenses)

Dashboards and Reports

Users with a Salesforce Platform user license can only view dashboards if the Running User of the dashboard also has a Salesforce Platform license. They cannot edit or create new dashboards.
Users with a Salesforce Platform Light user license cannot edit or create new dashboards and can only view dashboards if the Running User of the dashboard also has a Salesforce Platform Light license.
Users with a Force.com - Free user license cannot edit or create new dashboards and can only view dashboards if the Running User of the dashboard also has a Force.com - Free license.
Users with the Customer Portal Manager Custom license can access custom objects and run reports depending on their profile settings.

12) After lead conversion what will happen to lead data, is it deleted?

Removed from the Leads views, but the data is retained based on the standard field mappings (i.e First Name of the lead will go to First Name on the Contact, Company will go into the Account Name, etc).

13) Explain about apex jobs & scheduled jobs?

Apex job: Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.
Schedule job: To monitor or stop the execution of a scheduled Apex job using the Salesforce user interface, from Setup, enter Scheduled Jobs in the Quick Find box, then select Scheduled Jobs.

14) What is managed package?

Managed packages are typically used by salesforce.com partners to distribute and sell applications to customers.

Once the components are installed from a managed package, the components cannot be edited in the organization.

You must use a Developer Edition organization to create and work with a managed package. A Developer Edition organization can contain a single managed package and many unmanaged packages.
All Editions can create Unmanaged Packages, ONLY Developer Edition can create Managed Packages

15) What is unmanaged package?

Unmanaged packages are typically used to distribute open-source projects or application templates to provide developers with the basic building blocks for an application.

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Once the components are installed from an unmanaged package, the components can be edited in the organization.

16) **When will you go for a managed package?**

17) **When will you go for a unmanaged package?**

18) **What is the difference between managed and unmanaged package?**

19) **Is it possible to rename standard labels**?
Yes, Rename Object, Tab, and Field Labels. You can change the name of almost any object, field, or tab in Salesforce.

20) **What is multi-tenant architecture? Explain with an example?**
   A) Multitenant means a single environment can be shared across multiple organizations/Persons.

- Ex: Face book is a single application but which can be accessed by multiple persons.

21) **What is governor limits and why we have it?**
Governor limits are runtime limits enforced by the Apex runtime engine. Because Apex runs in a shared, multitenant environment, the Apex runtime engine strictly enforces a number of limits to ensure that code does not monopolize shared resources.

The Apex limits, or governors, track and enforce the statistics outlined in the following tables and sections.

- Per-Transaction Apex Limits
- Per-Transaction Certified Managed Package Limits
- Force.com Platform Apex Limits
- Static Apex Limits
- Size-Specific Apex Limits
- Miscellaneous Apex Limits

Per-Transaction Apex Limits

These limits count for each Apex transaction. For Batch Apex, these limits are reset for each execution of a batch of records in the execute method.

Total number of SOQL queries issued[1] (This limit doesn't apply to custom metadata types. In a single Apex transaction, custom metadata records can have unlimited SOQL queries.)	100	200

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Total number of records retrieved by SOQL queries	50,000
Total number of records retrieved by Database.getQueryLocator	10,000
Total number of SOSL queries issued	20
Total number of records retrieved by a single SOSL query	2,000
Total number of DML statements issued[2]	150
Total number of records processed as a result of DML statements, Approval.process, ordatabase.emptyRecycleBin	10,000
Total stack depth for any Apex invocation that recursively fires triggers due to insert, update, ordelete statements[3]	16
Total number of callouts (HTTP requests or Web services calls) in a transaction	100
Maximum timeout for all callouts (HTTP requests or Web services calls) in a transaction	120 seconds
Maximum number of methods with the future annotation allowed per Apex invocation	50

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Maximum number of Apex jobs added to the queue with System.enqueueJob	50	
Total number of sendEmail methods allowed	10	
Total heap size[4]	6 MB	12 MB
Maximum CPU time on the Salesforce servers[5]	10,000 milliseconds	60,000 milliseconds
Maximum execution time for each Apex transaction	10 minutes	
Maximum number of push notification method calls allowed per Apex transaction	10	
Maximum number of push notifications that can be sent in each push notification method call	2,000	

22) What is public groups and queues? Explain the purpose of it?

Groups are set of Users. They contain individual users, other groups, the users in the particular role, the users in a particular role plus all of the users below that role in the hierarchy.

There are two types of groups.
1. Public Group
|--> Only Administrator can create public groups, they can be used by everyone in the Organization.

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2. Personal Group

|--> Each user can create groups for their personal use.

Public Groups:

Public Groups are set of users and they are used in a

- Sharing Rule
- Giving Access to Folders
- Email alerts

Public groups made up of any combination of

- Users
- Roles
- Roles and Subordinates
- Public Groups

When the Public Groups are made up of roles or roles and subordinates, when a User is added or removed from the role, the public group membership is updated.

Queues:

- Queues allow groups of users to manage a shared workload more effectively.
- A queue is a location where records can be routed to a wait processing by a group member.
- The records remain in the queue until a user accepts them for processing or they are transferred to another queue.
- We can specify the set of objects that are supported by each queue.
- We can also specify the set of users that are allowed to retrieve records from the Queue.

23) What is the difference between ISNULL & ISBLANK?

Use ISBLANK instead of ISNULL in new formulas. ISBLANK has the same functionality as ISNULL, but also supports text fields. Salesforce will continue to support ISNULL, so you do not need to change any existing formulas.

A field is not empty if it contains a character, blank space, or zero. For example, a field that contains a space inserted with the spacebar is not empty.

24) What is the difference between custom settings and custom label?

Custom settings

Custom settings are similar to custom objects. Custom sets of data can be created using custom settings which can be referred in apex code, salesforce api, formula fields or validation rules. The advantage of using custom setting is that there is no need to fire query.

Types of custom settings include List and Hierarchical custom settings.

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List custom setting:-

A type of custom setting that provides a reusable set of static data that can be accessed across your organization

Hierarchical custom settings:-

A type of custom setting that uses a built-in hierarchical logic that lets you “personalize” settings for specific profiles or users.

Custom label:

Custom Labels are custom text values, up to 1,000 characters, that can be accessed from Apex Classes or Visualforce Pages. If Translation Workbench has been enabled for your organization, these labels can be translated into any of the languages salesforce.com supports.

25) When will you go for a custom label instead of custom setting?

26) When will you go for a custom setting instead of custom label?

27) How can you override detail view and list view button with visual force page?

I am overriding the list view and detail view with the visual force pages .I am overriding the tab of custom object as well with list view page. I am using enhanced list on the list view vf page.

Under object we can find the button and links list in this list click on edit button witch button do you want to override, after click on override radio button then select your vf page then click on save.

28) What is person account and business account?

By default, Person Accounts are not enabled. Once enabled, Person Accounts cannot be disabled. (I would recommend you enable a Developer Edition first and test out your solution there before enabling your Production Org.)

So when Person Accounts are enabled you'll see a new set of menu items under Setup -> App Setup -> Customize -> Accounts.

You can configure Person Account page layout like you would any other type of page layout. You'll need to go and assign the new record type to each of the profiles that need access to it.

Once you've done you will be able to create accounts for Business and Personal record types.

29) Is it possible to show custom button in a standard page? If so how?

Yes, create custom button in buttons and links then add that custom button in page layout.

30) How many master-detail and lookup relationship fields we can create for an object?

Two master detail relationship only for custom object and 25 lookup relationships.

31) What is global variable? Explain any 2 of them?

Use global variables to reference general information about the current user and your organization on a page.

Global variables must be referenced using Visualforce expression syntax to be evaluated, for example, {!$User.FirstName}.

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$Label
A global merge field type to use when referencing a custom label.

$ObjectType
A global merge field type to use when referencing standard or custom objects (such as Accounts, Cases, or Opportunities) and the values of their fields.

$Resource
A global merge field type to use when referencing an existing static resource by name in a Visualforce page. You can also use resource merge fields in URLFOR functions to reference a particular file in a static resource archive.

$User
A global merge field type to use when referencing information about the current user. User merge

fields can reference information about the user such as alias, title, and ID. Most of the fields available on the User standard object are also available on $User.

32) Explain visualforce email templates?
Administrators and developers can create templates using Visualforce. Visualforce email templates allow for advanced merging with a recipient's data, where the content of a template can contain information from multiple records.

33) What does "Custom field validation exception" means? How will you resolve it?
I got the same exception. My trigger was on Leads. So I checked my code. it was all correct, So went back to the object and checked existing records.
I had an already existing record in Leads object that was actually violating my trigger.
This record was created prior to the trigger creation.
So just made small correction and it all worked out fine.

34) How to access parent object from child object?
for example, account.name will work on contact object as contact defines account has its parent.

In your custom object, go to the relationship field and check its api name. it would be something like Account__c. then you can access the account field in the forumula using relationship name Account__r. so for account name, the expression would be Account__r.name

35) Explain debug logs?
The system generates a debug log for a user every time that user executes a transaction and errors that occur when executing a transaction or while running unit tests and the user has a trace flag with start and expiration dates that contain the transaction's start time.

36) Explain external ids and its usages?
These are used when we interacting with an external systems. It will act as a unique id .we can define 3 external fields per object.

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Email , Text, Number.

External id is used in upset operations in data loader.

If external id is not matched Then a new record is created.

if external id is matched once then record will be updated.

If external id is matched multiple times then error will occurred.

37) Explain customer portal and partner portal?

Communities is our next generation portal that combines the power of the Force.com platform, Site.com branding, and Chatter collaboration. With Communities, you can streamline key business processes and socialize them to the internal and external users you choose. Additionally, you can engage with external users on any record.

Communities contain the functionality available in partner portals and Customer Portals, plus many additional features.

38) What is Salesforce Communities?

Salesforce Communities is an online platform that enables rich collaboration between employees, customers, partners, suppliers and distributors. Organizations can create fully-branded public or private communities that connect members directly with each other – and with relevant content, data and business processes. Salesforce Communities is the only community platform that combines the power of social with mobile participation, trusted security, and direct connection to business processes.

39) What is the difference between permission sets and profiles?

Permission sets:- A permission set is a collection of settings and permissions that give users access to various tools and functions. The settings and permissions in permission sets are also found in profiles, but permission sets extend users' functional access without changing their profiles.

Profile: A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visual force page access, Page layouts, Record Types, Login hours & Login IP ranges.

40) What all are the relationship available in salesforce?

Look up Relationship (40 within the object)(1:M)

Master-Detail Relationship(2 within the object)(1:M)

Many-to-Many Relationship(1 junction object)

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Hierarchical Relationship(Role purpose)

41) **What is hierarchical relationship? Give an example?**

Hierarchical relationship is a special lookup relationship available only for the user object. It allows users to use a lookup field to associate one user with another that does not directly or indirectly refer to itself. For example, you can create a custom hierarchical relationship field to store each user's direct manager.

42) **Is it possible to achieve hierarchical relationship for custom object? What would be the alternate if not?**

43) **If a primary master record is deleted, what would happen to the junction object record?**

44) **What is junction object? What is the use of it?**

Junction objects are used to create many to many relationships between objects. If you take the Recruiting application example, you can see that a Position can be linked to many Candidates, and a Candidate can apply for different Positions. To create this data model you need a third object "Job Application" that links the 2 objects

45) **What are different types of reports available in salesforce?**

4 Types of reports in Salesforce

Tabular Reports: - We can display only grand total in the table form.

Summary Report:- It is a detail form of in which the grouping done based on Colum.

Matrix Reports:- It is a detail form of in which the grouping done based on row and Colum.

Join reports:- We can join the two or more reports in the single report display in the form of blocks.

46) **What is analytical snapshot? Explain it with a sample use case?**

47) **How to find maximum value of grouping in a summary report?**

3 is the maximum level of grouping for a Summary report.

48) **Explain custom summary formula in reports?**

Create custom summary formulas for summary and matrix reports to calculate additional totals based on the numeric fields available in the report.

A formula is an algorithm that derives its value from other fields, expressions, or values. Custom summary formulas can contain 3900 or fewer characters. Custom summary formulas are available for summary, matrix, and joined reports. They can't be shared across multiple reports.

Build your formula:

a. Select one of the fields listed in the **Summary Fields** drop-down list. This field’s value is used in your formula.

b. Select the kind of summary type to use in your formula. This option is not available for Record Count

Summary Type	Description

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Sum	The summary value of data in a field or grouping of fields.
Largest Value	The largest value of data in a field or grouping of fields.
Smallest Value	The smallest value of data in a field or grouping of fields.
Average	The average of data in a field or grouping of fields.

49) When we should go for custom report types?

Custom report types allow you to build a framework in the report wizard from which users can create and customize reports.

– You build custom report types off of the relationships (master detail and lookup) between objects so that you can:

• Choose which standard and custom objects to display to users creating and customizing reports

50) Explain about roles in Salesforce?

Role control the level of visibility that user's have an organization data.

Roles are record level settings.

51) What is role and role hierarchy?

Role hierarchy: Role Hierarchy states that higher hierarchy person can see lower hierarchy person records.

52) What is sales cloud and service cloud?

Sales Cloud:

When we develop product in force.com for sales then it comes in Sales Cloud Ex: - Account, Contacts, and Lead".

In Other Words " we can say that The Sales Cloud from salesforce.com is the world's #1 sales application. It gives reps, managers, and execs everything they need to connect with customers and focus on what's important —more selling and less administration. It helps you close more deals - faster, gain real-time visibility into sales, and connect with today's social customers".

Service Cloud:

When we want to provide some facility and also provides support to the clients then it comes in Service Cloud. Ex: - create cases is the example of Service Cloud in which client write his problem into cases instead of call.

In Other words "In service cloud when we sales product to client then we provides the many different types of facilities to client which will be helpful to client just like Call Center.
In call Center ,client can make a call and ask his problem regarding product and can find the better solution about his problem".

53) Difference between sales cloud and service cloud?

Sales cloud:

Sales Cloud" refers to the "sales" module in salesforce.com. It includes Leads, Accounts, Contacts, Contracts, Opportunities, Products, Price books, Quotes, and Campaigns (limits apply). It includes features such as Web-to-lead to support online lead capture, with auto-response rules. It is designed to be a start-to-end setup for the entire sales process; you use this to help generate revenue.

Sales Cloud Implements Sales and Marketing.

Sales Cloud ,A great solution for small and value oriented mid-sized sales groups that want to rapidly and cost effectively deploy Salesforce.

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Sales Cloud gives you the ability to open Cases (issues) and relate them to Accounts, Contacts; etc.

When we develop product in force.com for sales then it comes in Sales Cloud Ex: - Account, Contacts, and Lead.

Service Cloud:

Service Cloud" refers to the "service" (as in "customer service") module in salesforce.com. It includes Accounts, Contacts, Cases, and Solutions. It also encompasses features such as the Public Knowledge Base, Web-to-case, Call Canter, and the Self-Service Portal, as well as customer service automation (e.g. escalation rules, assignment rules). It is designed to allow you to support past, current, and future clients' requests for assistance with a product, service, and billing. You use this to help make people happy.

Service cloud implements Salesforce Knowledge.

Service Cloud provides Customer Support to the Clients and giving you the tools to provide a better customer experience for your clients.

The Service Cloud is a superset of Sales Cloud, meaning you get everything that is in Sales Cloud PLUS some other features.

When we want to provide some facility and also provides support to the clients then it comes in Service Cloud. Ex: - create cases is the example of Service Cloud in which client write his problem into cases instead of call.

54) Explain about different types of sandboxes?

Sandbox: Sandbox is a copy of your production organization. You can create multiple copies of your organization in separate environments for different purposes such as development, testing and training without compromising without compromising the data and applications in your production organization.

Sandboxes are completely isolated from your Salesforce production organization. So opera rations perform in your sandboxes do not effect in your Salesforce production organization and vice versa.

4 Types of sandboxes are available.

1. Developer Sandbox
2. Developer pro sandbox
3. Partial data sandbox
4. Full copy sandbox

Developer Sandbox:

It copy only configuration changes from the production.

It won’t copy real time data.

We can test the configuration changes with sample data.

Sample data limit is 200mb.

Refresh time interval is one day.

If we refresh all the sandbox contents will be replaced with production contents.

Developer pro sandbox:

Copy configuration changes.

No real time data.

Sample data limit is 1GB.

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Refresh time interval one day.

Partial data sandbox:

Copy configuration changes.

Copy certain amount of real time data.

Real time data limit is 5GB.

For each table it can copy maximum of 10k records.

Refresh interval 5 days.

Full copy sandbox:

It is exact replica of the production

Copy both configuration and entire real time data from the production

Refresh time interval 29 days

55) Tasks are stored in which object?

56) What is a Business Process?

Allows you to track separate sales, support, and lead lifecycles across different divisions, groups, or markets

Available Business Processes:

– Sales Processes – Create different sales processes that include some or all of the picklist values available for the Opportunity Stage field

– Support Processes – Create different support processes that include some or all of the picklist values available for the Case Status field

– Lead Processes – Create different lead processes that include some or all of the picklist values available for the Lead Status field

– Solution Processes – Create different solution processes that include some or all of the picklist values available for the Solution Status field

57) How you are using version controlling? How are you handling multiple developers working in a single file?

58) What all are the ways available to make a field required? Which one is applicable for web service call as well?

59) Can we use field level security to make a field required?

No.

60) Different ways to make a field mandatory?

Refer above.

61) Can a formula field references any field that is restricted by field level security?

62) Explain about FLS, PL, and Record Type. Among that which will take precedence?

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Refer above for FLS,PL and Record Type. Among this PL is the precedence.

63) **What is object level and field level security?**

Object level is the profile level and field level is the role (for FLS and profile referee above)

64) **What is email to case? What are the way we can implement email to case?**

Salesforce can automatically create a case when an email is sent to one of your company's email addresses, such as support@company.com. This Email-to-Case functionality auto-populates case fields from the content of each email. For example, an email subject heading becomes a case subject. Your organization can set up Email-to-Case or On-Demand Email-to-Case to efficiently resolve and correspond with customer inquiries via email. Salesforce allows you to choose one of two Email-to-Case options:

65) **What is email to case agent?**

Email to case agent is installed on your local/Server System. It fetches message from your email Server (Email address dedicated to Email to Case), Process it and creates Case records inside Salesforce.

As we know that there is limit of attachment size in Case, so using this Agent we can save that attachment on Local / Server hard drive.

66) **What is on demand email to case?**

On-Demand Email-to-Case helps your company efficiently resolve customer inquiries via email. Salesforce automatically creates cases and auto-populates case fields when customers send messages to email addresses you specify. On-Demand Email-to-Case lets you process customer emails up to 25 MB.

67) **What is web to case?**

Gather customer support requests directly from your company's website and automatically generate up to 5,000 new cases a day with Web-to-Case. Setting up Web-to-Case involves enabling the feature, choosing settings, and adding the Web-to-Case form to your website.

68) **How to avoid read permission on the record for the person who is above in the role hierarchy?**

Un check role hierarchy check box.

69) **What are the ways we can restrict the record level access in Salesforce?**

1. Profile.
2. OWD.
3. Role hierarchy.

70) **What are the ways we can provide access to a record in Salesforce?**

1. Profile.
2. OWD.
3. Role hierarchy.
4. Permission sets.
5. Sharing Rules.

71) **Explain about site.com?**

Force.com sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand.

72) **Explain about SOQL polymorphism?**

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With SOQL polymorphism you can provide instructions directly in the SOQL query on what to do for each possible type of object. You do this via the new TYPEOF clause. Here's an example using the Event. What polymorphic relationship mentioned earlier:

73) **When will you use sub queries?**

74) **What is the difference between SOQL and SOSL?**

SOQL (Salesforce Object Quarry Language):
Using Soql we can search only on one object at a time.
We can quarry on all field of any data type.
We can quarry on triggers and classes.
We can perform DML operation on quarry result.
SOSL (Salesforce Object Search Language):
Using Sosl we can search on many objects at a time.
We can quarry only on fields whose data type is Text, Phone and Email.
We can use only in classes but not in triggers.
We can't perform DML operations on search results.

75) **What is SOSL?**

Salesforce Object Search Language (SOSL) to construct simple but powerful text searches for the Search() call. Unlike SOQL, which can only query one object at a time, SOSL allows you to efficiently search text, email, and phone fields for multiple objects at a time with a single query.

76) **What is the return type of SOSL?**

Returns Fields.

77) **What all are the different actions available in workflow?**

1. Email Alert.
2. Field Update.
3. Task
4. Outbound Message.

78) **What are the limitations in using time triggered workflows?**

This Action will be performed at given time frame.
We can't create time dependent workflow actions when you choose the evaluation criteria is "Every time a record is created and edited".
We can create 10 time triggers on a single workflow rule on every time trigger we can add upto 40 actions.
out of 40 actions 10 email alerts, 10 field updates, 10 outbound messages, and 10 task creation.
Salesforce doesn't necessarily execute time triggers in the order they appear on the workflow rule detail page. Workflow rules list time triggers that use the Before field first, followed by time triggers that use the After field.
Limitations:
Time triggers don't support minutes or seconds.
Time triggers can't reference the following:
DATE or DATETIME fields containing automatically derived functions, such as TODAY or NOW.
Formula fields that include related-object merge fields.
You also can't add or remove time triggers if:
The workflow rule is active.
The workflow rule is deactivated, but has pending actions in the queue.

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The workflow rule evaluation criteria is set to Evaluate the rule when a record is: created, and every time it’s edited.
The workflow rule is included in a package

79) What all are the workflow actions available in Salesforce and what all are the actions which you have used in your project?
    a. Email Alert.
    b. Field Update.
    c. Task
    d. Outbound Message.

80) Is it possible to remove time bound workflow action, if so how will you do it?

81) What all are the criteria’s available while creating workflow rule?

Workflow contains 3 types of criteria’s.

1. Created
2. Created, and every time it's edited.
3. Created, and any time it's edited subsequently meet criteria

Created: If you choose this evaluation criteria , whenever a new record is created automatically it verifies the workflow rule.

Created, and every time it's edited: If you choose this option, whenever a new record is created or existing record is modified then it checks the workflow rule.

Created, and any time it's edited subsequently meet criteria: If you select this option whenever a new record is created or any one of the existing record which is not meeting the criteria when it is modified it will check the workflow rule.

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