Salesforce Administrator Interview Questions

1. What is CRM?

CRM Stands for Customer Relationship Management. And It system helps businesses manage all the interactions it has with customers and potential customers. With a CRM system, customer preferences are recorded, and customer activity can be tracked. So, every time they are spoken to, regardless of who they talk to, customers get a fully personalized and consistent experience.

2. What is cloud Computing?

Cloud computing is the delivery of on-demand computing services -- from applications to storage and processing power -- typically over the internet

Cloud computing is referred to as Internet-based computing that involves shared resources, software, and information provided via mobiles or computers.

3. What is Paas, Saas, Iaas?

IaaS (Infrastructure as a Service) – Here, cloud service providers largely focus on infrastructure services like hosting, server, storage services, etc.

SaaS (Software-as-a-Service) – This is a software delivery model in which software is licensed on a subscription basis and hosted centrally.

PaaS (Platform-as-a-Services) – This is a category of cloud computing services that provide a platform allowing customers to develop, run, and manage apps.

4. What is Salesforce?

Salesforce is a customer relationship management solution that brings companies and customers together. Salesforce unites your marketing, sales, commerce, service, and IT teams from anywhere with Customer 360 — one integrated CRM platform that powers our entire suite of connected apps. It works based on Cloud computing and one of the top leading CRM technology.

5. What is Sandbox and Types?

It is a copy of your organization in a separate environment that can be used for a variety of purposes (such as testing and training) without compromising the data and applications in your Salesforce.com production organization

There are 4 kinds of Salesforce sandboxes:
- Developer sandbox
- Developer Pro
- Partial Copy
- Full sandbox

6. What is global search?

The Global Search Results component displays search results from across the community. The results shown are based on search terms entered in the Search Publisher and can be displayed in one list or in multiple tabs.

7. What is Object?

Object is a data table in salesforce where we store customers data. Objects are 2 types standard and custom object.

8. What is site url to check any maintenance or issue from salesforce to check?

trust.salesforce.com or also from status.salesforce.com

9. Difference between salesforce and salesforce platform licenses?

- Salesforce License allows complete access do in the Salesforce
- Salesforce Platform is restricted license than the Salesforce license and gives less access. And we cannot access Opportunities and cases objects

10. what is use of single sign on information and federation id?

- Single sign-on is useful to login into salesforce from other applications (facebook or google) or VPN of company.
- The feature id is used set up single sign on, it is the id that can be the same as say an email id or Unique value field used in a different application that will be recognized by Salesforce and logins you into Salesforce without you having to go through the normal login process instead of login using username and password again.

11. Use of setup page?

Setup is used to customize, configure and see all settings used to develop and manage Salesforce.

12. where can you change your personal details of your user?
    By clicking your user logo/profile and click on my settings

13. how to provide access to salesforce support?
    By clicking your user logo/profile and click on my settings -> Grant Account login access

14. what is use of Security token in salesforce?
    Its case sensitive formatted token which is unique and secured(should not share) used to login into tools or from other integration systems along with password.

15. Use of Notification icon in salesforce?
    It is used when another person tags you or chatters you and can see message
16. can you create user from profiles?
    Yes we can, click on assigned users >> New user button
17. how many profiles we can assign to a user?
    Only one profile
18. how many users we can assign to a profile?
    Multiple users

19. how to set IP Address restriction?
    Go to Setup >>Profile >> System Information>> Login IP Range

20. what is use of password policies settings in profile?

    It is used to set password expiration time duration, password length, character format(containing special character, alphabetical and numeric etc.,) and Lockout time and Remembering passwords etc.,

21. What is Role (simple words)?

    It is Job title of the Person(user) in the organization. Roles will gives access to read data that user creates and the data created subordinates in role hierarchy.

22. What is Profile (simple words)?

    It is Job Function of person(user) is he has to do in salesforce with required access set by profile permissions and settings and also controls the data accessibility

23. What is Role Hierarchy?

    The ladder/tree structure of Job titles(user Roles) put in place so that those higher up can see the data created by sub ordinates of roles beneath them.
24. How to change profiles enhanced view?

    Quick Find Box → User Management Settings → Enhanced Profile User Interface → Toggle to Enable

25. What is standard Objects?
    The objects created by salesforce by default and which we cannot delete are called as standard objects

26. What is Custom object?

The objects created by ourselves and not standard objects are called as custom objects.

27. What is permission set?

It is similar like profiles and used to extend specific access through permissions and settings.

Main difference between profile and permission set is a user can have multiple permission sets and but single profile.

28. What is company information?

From company information we can when salesforce org created, instance , org id, number of licenses available and permission licenses available etc.,

29. Difference between role and profile?

Profile:

- A Profile is a collection of settings and permissions that controls the user what they have to do in the application and with access what they have.
- A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.
- Defining profile for a user is mandatory.

Role:

- A role controls the level of visibility that users have into your organization's data. Mainly is going to provide the record level security.
- Users at any given role level can view, edit, and report on all data owned by or shared with users below them in the hierarchy, unless your organization's sharing model for an object specifies otherwise.
- It is not mandatory that a user should have a role.

30. why do we use permission sets?

Permission sets are used to extend the access controlled by profile level to individual users to do multi activities.

31. differences between profiles and permission sets?

- One user can have only one Profile and One user can have multi permission sets.
- Permission sets are Useed as extended access of profiles for specific needs
- In Permission sets we don't have features like Login/password policies and session settings etc.,

32. what is permission set group?

A group of permissions sets called as Permission set group. We can add all permissions related to one job function as one group , so It will be easy instead of assigning one by individual permission to users

33. what is use of muting permission set in permission set group?

By Adding Muting Permission in permission set group we can switch off/turn off/remove particular permission/Setting within a group without affecting the rest of the permission sets within the group

34. What is use of Chatter in salesforce?

Chatter Used to collaborate and exchange message other internal salesforce users.
The main advantage it will reduce email communications and exchanging information in different tools and apps and all information it can save in salesforce.

35. What is chatter group?

It's group we created in salesforce either public/private access with different users or customers as members to share messages and collaborate about a certain topic, project or account.

36. can we add members into group without having users created in your salesforce?

Yes as long as you check the 'Allow Customers' box and it is a public

37. what is difference between Post & Comment?

post is when any user publishes a message by tagging another user or just message in chat box.
comment is when any user responds to another user's post/Message/question/announcement.

38. what are the types of chatter groups?

- Public (Can 'Allow Customers)
- Private
- Unlisted
- Broadcast Only

39. What is use of Stream chatter?

Stream chatter is used to track and get notifications of particular record of any object in salesforce quickly.

40. What is object?

Object in salesforce is entity or memory space where we story the data. Objects can be different types and N number based on type and behavior of data in organization. There are 2 type of objects in salesforce standard and custom.

41. What is field?

Field is element/attribute in object where we give the information values. Fields in salesforce created based on data types which are dependent on behavior of data.

42. Difference between standard and custom objects?

Standard objects bydefault/created by salesforce for any salesforce scratch org. Standard objects we cannot delete.
Custom objects which we create in salesforce based on requirement of business which can be deleted.

43. Give some example field data types?

Lookup, formula, text, text area, phone, email, picklist etc..

44. Difference between field label and field name?

Field lable which shows on the User end when we are creating any record which can be repetitive , Field name /API name is in the backend in configuration which is unique. For custom fields API names of fields append with __c

45. Can you delete/change name of standard field?

No, we cannot as these are created by salesforce.

46. differences between Text, Text Area, TextArea (long) ,TextArea (rich) Data types

- Text : Alphanumeric, length upto 100 and can be write in single line
- Text Area : Alphanumeric, length upto 255 and can be write in multiple line
- TextArea (long): Up to 131, 072 characters on separate lines.
- TextArea (rich): Up to 131,072 on separate lines Can add images and format text (Italic, bold, etc)

47. what is use of formula field?

Formula fields in salesforce used to auto updated value based on formula/calculation logic we implement and it’s a read only field.

48. What is setting name(checkbox) to create tab from object?

Launch New Custom Tab Wizard after saving this custom object

49. While creating object/field what is difference between visible & Read only?

- Visible allows you to see and edit the field.
- Read only restricts the user so that they can only see the field but not modify or edit it.

50. what is use of External Id?

It is a unique text(alphanumeric) that can be used as a reference for that particular field to allow you to connect it to tools outside of Salesforce for integration or data upsert.

51. What are the types of object relationships and explain about each one briefly

LookUp Relationship –

This relationship links two objects cannot affect deletion on one another and cannot depends on security and not automatically required fields and will not gives inherited sharing

Master-Detail Relationship –

This relationship links two objects can affect deletion on one another and can depends on security and automatically required fields and will gives inherited sharing

Many to Many Relationship -
A many-to-many relationship allows each record of one object to be linked to multiple records from another object and vice versa.
To create a many-to-many relationship, simply create a custom junction object with two master-detail relationship fields, each linking to the objects you want to relate.

52. what is cascade deletion?

Cascade deletion happens when the relationship is master-detail. If parent get deleted then automatically child's records also get deletes.

53. what is junction object?

Object that creates the relationship between two other objects such as in a many to many relationships.

54. Does an object can have both relationships (Lookup Relationship & Master Detail Relationship) at a time?

Yes, single object can have both relationships at a time.

55. What is a "Self-Relationship"?

A self-Relationship is a lookup relationship to the same object.

Suppose let's take an object "Merchandise". Here we can create relationship in between the Merchandise to Merchandise (same object) object. That is called "Self-Relationship".

56. What are the main things need to consider in the “Master-Detail Relationship”?

Record level access is determined by the parent, Mandatory on child for reference of parent, cascade delete (if you delete the parent, it can cascade delete the child).

57. What are the main things need to consider in “Lookup Relationship”?

Loosely coupled, not going to have all the above rules which are existed in master detail relationship.

Self-relationship is always lookup to self-relation object type. In many to many we actually create a junction object in the middle, it does lookup for the bound objects that are ultimately being bounded in a many to many way.

58. Can we convert the lookup relationship to Master Detail relationship?

Yes, We can convert the lookup relationship to master detail relationship only if all the existing record has valid lookup field values.

59. Can we create Master Detail relationship on existing records?

No. first we have to create the lookup relationship then populate the value on all existing record and then convert it.

60. What is page layout and what is use?

Page layouts in salesforce are used to design a page with fields, buttons, section and other related objects to create/update data for difference objects.

61. What is compact layout and what is use?

Compact layout is the one shows in highlight panel when we open any record. We can add till 10 fields in the compact layout.

62. What is search layout and what is use?

Search layout are the search results fields will be display after we search any record in global search in salesforce. We can create different search layouts for different profiles, we can add maximum 10 fields in search layouts.

63. What is Record Type?

Record types are used to show different layouts, picklist values and custom business processes based on need and requirements. For example to differentiate Account for sales, support and Marketing teams.

64. What is difference between Master Record type and custom record type?

- The by default and invisible record type by salesforce is master record type. For every object there will be one master record type
- The record type we create in salesforce is custom record type.
- At a time, we can set any profile either master record type or number of custom record types. And always there should be one default record type

65. what are advantages of Record type?

1. Can set different Pagelayouts to different profiles
2. Can set different picklist values to different record types so to profiles.
3. Can set different process (support or sales) and Path settings

66. can you edit formula field value?

No, Formula fields are by default read only fields, which we cannot be able to edit value from page layout. It will updates based on formula created upon other field values.

67. what is page layout assignment?

Page layout assignment are used to assign different layouts created for selected Profiles

68. What are types of behavious in behaviour selection while creating button/link?

We have 5 types of behaviors to create button/link on a object.

- Display in New Window
- Display in Existing Window with Side Bar
- Display in Existing Window without Side Bar
- Display in Existing Window without Side Bar or Header
- Execute java script

69. What is difference between List button, detail page button or detail page link?

Custom buttons and links help you integrate Salesforce data with external URLs, applications, your company's intranet, or other back-end office systems.

List button—Appears on a related list on an object record page.
Detail page link—Appears in the Links section of the record details on an object record page.
Detail page button—Appears in the action menu in the highlights panel of a record page.

70. where in page layout we need to add button to show up in highlight panel of account.

In Salesforce Mobile and Lightning Experience Actions section

71. what is look up filter and use of it?

Lookup filters can be add in any lookup filed to do filtering of any lookup relationship objects records based on condition you set.

72. What is validation rule and use of it?

Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False”.

73. What is Field history tracking?

Field history tracking in salesforce used to track any field changes happens by a user on any record. To enable this, we need to enable field history tracking checkbox on in object and select the fields want to track. The field history data is retained for up to 18 months.
Field history tracking in salesforce can be enabled for Standard objects and Custom objects.

74. what is field dependency?

Field dependencies in salesforce used to control the visibility of picklist values on one object based on another object. The object which controls the visibility of other objects we called as controlling object and object which get controlled called as Dependent object.

Data Type	Can we define as Controlling field	Can we define as Dependent field
Standard Picklist	Yes	No
Custom Picklist	Yes	Yes
Multi-Select pick list	No	Yes
Checkbox	Yes	No

75. What is use of Hierarchy columns?

Hierarchy columns in salesforce used to set the fields should be display as columns when we click on hierarchy button on object record. We can add maximum 10 fields in hierarchy columns.

76. where can we see object limits for any object?

Object limits can be check in any object from Object Manager side panel called Object Limits. And this will show the Usage, Limits & % used value of different metadata

77. what is OWD?

Organization Wide Defaults(OWD) Used to Control or set the First/basic Access level for any object. We can set access for internal & external users and also set Role hierarchy should work or not.
We have majorly 3 levels of access controls.

- Private
- Public read only
- Public Read/Write

78. what is sharing rule?

Sharing rules are used to extend the access which was restricted by OWD settings to a particular Group of users, Roles or territories based on Ownership or Criteria based.

79. What is difference between Public Read/write, Public read only, Private access levels?

- Public Read/Write, can provide access to Read & edit the records
- Public Read Only, can provide access to Read the Record but cannot edit
- Private Access, only the Owner/creator of the record and the User above hierarchy above created by user can edit or view the records

80. what is schema builder and how it's useful?

- Schema Builder is a tool that lets you visualize and edit your data model. It's useful for designing and understanding complex data models. Simply words we can say its helps to see blue print models of salesforce org design with objects.
- Schema builder has a drag and drop interface which is used to perform all the activities. It shows all the relevant details like - field values, data types, relationship with directions etc.

81. what is matching rule?

Matching rules are set based on criteria to identify/determine the field values ona new records by Matching existing data for the same field values

82. What is duplicate rule?

Duplicate rules are used to identify duplicate field values on new records by using matching rules through checking existing data field values.
Matching and duplicate rules work together.

By using duplicate rules either we can show alert message and let user to continue duplicate data or we can block user to create duplicate data.

83. What is assignment rule?

Assignment rules in salesforce are used to automatically assign lead or Case to owner(**User Or Queue**). **Assignment rule** is used to automate owner assignment on Case and Lead based on conditions on Case or Lead. There are two type of assignment rules

- Lead Assignment Rules
- Case Assignment Rules

84. how many assignment rules can be active one time?

We can only able to activate One assignment rule on Case and Lead assignment rules

85. What is public group?

Public group used to group multiple user into one and used in adding into queues, Data sharing etc.

86. What is Queue?

Queues are groups of users who can own records. All records in Salesforce must have an owner. We can add Groups, users, Roles and Roles & sub ordinates to share the records access routing.

87. What is DML operation what is different process/types in it?

DML: Data Manipulation Language, in Software technologies We use DML languages to do any action with the data. In Salesforec SOQL and SAQL as DML Languages..
The main Actions we do with DML operations are

a. Insert
b. Update
c. Upsert
d. Delete
e. Export

88. What is Data migration means?

Doing any Action of DML operation(insert, update, upsert, delete and export) on data is called Data migration.

89. What are disadvantages observed with Data import wizard?

- For simple imports of up to 50000 records.
- It supports all custom objects and only few standard objects like Account, Contact, Leads, Solution.
- Delete operation is not available.

90. Differences between Import wizard and Data loader..

Data Import Wizard	Data Loader
For simple imports of data	For complex imports of data
It can load up to 50,000 records.	It can load up to 5,00,000 records.
It supports all the custom objects and only a few standard objects like Account, Contact, Campaign members, person accounts, Leads, and Solution.	It supports all custom and standard objects.
It supports schedule export.	It doesn't support scheduled export.
Delete operation is not available.	Delete operation is available.
Cannot import cases and opportunity.	Can import cases, events, tasks, and opportunities
While importing, duplicates can be ignored.	While importing, duplicates cannot be ignored.
It doesn't require installation.	It requires installation.

91. what is maximum batch size you can set in dataloder.

    Batch Size: This will set how many records are processed in each batch. The maximum value is 10,000 when the Bulk API is enabled, otherwise it is 200.

92. what is difference between delete and hard delete
    Delete : it will delete the records from salesforce but will story in salesforce recycle bin for 15 days to delete completely.
    Hard Delete: it will delete records from recycle bin too same time

93. what is Report Type?
    Report type is simply a template in salesforce which is builded based on objects and relationships in between objects and fields. Every report in salesforce can be create only based on report type.

94. what is Report?
    Reports in salesforce used to summarize or illustrates the data interms of graphs and grouping to do analysis and quick validation and understanding.

95. what are Types of reports?
    We have 4 types of reports in salesforce..
    a. Tabular
    b. Summary
    c. Matrix
    d. Joined

96. How many grouping you can made in a report?
    We can create only 3 fields as grouping in salesforce.

97. how add/remove fields in report types?
    Check the Report type from which report you do not want to see field/ add fields
    Go to setup → search and open Report Types → Check and Open Right Report Name → Click on edit layout button → Drag and drop fields and Save it..

98. how many objects you can relate in a report type?
    We can build report types with maximum 3 objects.

99. what is bucket field, row level formula in reports?

    Row level Formula : used to calculate or display field values by calculating the other fields values at row level
    Bucket field: used to Quickly categorize reports in records without creating a formula field.

100. Limitations of Bucket fields?

- Total Bucket Fields allowed per report - 5
- Total Buckets allowed per Bucket Field - 20
- Total values allowed per Bucket - 20 (doesn't include the use of "Other" as permitted within the Bucket Field's setup)
- Total values allowed per Bucket Field - 42-45 values

101. What is Dashboard , why we use it?

A dashboard shows data from different source reports interms of charts and numbers, it will helps to give quick view of sales and claim process progress of an organization. We can add maximum 20 reports in a dashboard.

102. What are the type of dashboards and explain?

We can basically categorize dashboards into 2 types based on view of data.

1. Static Dashboard: View as creator , View as any other user
2. Dynamic Dashboard : View dynamically based on login user, can be able to change dashboard viewer.

103. how many reports we can create in a dashboard?

20 reports

104. how many filters we can create in dashboard?

3 filters

105. what is use of subscribe button?

Subscribe button is used to subscribe the dashboard with the date & time you want , so you will get an email to your outlook with the reports chart or data. Subscribe can be done at report /Dashboard.

106. what is list view?

List views in salesforce are used to show the data in list of rows when we click on tab. There will be always one standard list view' Recently Viewed Records' Apart from that whatever we create in salesforce as new are called as custom list views..

107. How many filter we can add in list view?

We can add maximum 10 filters

108. how many fields we can add list view display?

Maximum we can add 15

109. What are the 3 options while sharing list view?

a. Only I can see
b. All users can see
c. Share by group or role of users

110. what is kanban view?

Kanban views show records in a graphical way that helps you monitor your work and keep deals moving ahead. Kanban views are available for most objects, with exceptions such as tasks. Set Up a Kanban View. Arrange a kanban view to show a graphical view of records in a list view.

111. What is Territory? and use of it?

Territories in salesforce used to divide the accounts based on geographic with address/ or any other criteria and assign accounts to sales users and provide access to Account, Opportunities and cases.

112. What is Assignment Rule?

Assignment rules in territories are used to set a condition/criteria which all account can be add to that particular territory.

113. what are the objects of level of access we give in territory?

- No view
- View only
- View, Edit and Delete

The objects available are Account, contact, case and opportunities

114. What is inheritance assignment rule?

Its same as assignment rule , if we check the check box Applied to child territories , then the same rule will also apply to all the child territories for a parent territory. And all child territories will get assigned this as inheritance assignment rule.

115. What are the 3 options when you export translations?

- Source–Used as the initial source for creating **translations**. ...
- Outdated and untranslated–Used to make updates. ...
- Bilingual–Used for reference and reviewing all your untranslated and **translated** customizations.

116. How to translate a object tab?

In Rename Tabs and Objects in from Setup

117. how to enable any language to support translate

Search in Quick find for – Translate- open Translation settings – add language available for Translation

118. What is Global Action?

Global Action in salesforce used to create or update records quickly from “+” global action bar on any object and any action for example Log a call, create Task, Create Event, Create Contact etc..

Global Action can be create own pagelayout and we need to publish the same after with Publisher action layout.

119. What is Picklist value set? Advantages?

Global Picklist value or picklist value sets main purpose to use the list of same picklist values across different Objects in salesforce and to restrict the picklists to only the values that you specify. A global picklist is a restricted picklist by nature.
You can have up to 500 picklist global value sets in an org.

120. How to check documents in salesforce?

Documents is still available in classic salesforce version and not yet in lightning, To Open documents switch to classic , Click on All Tabs and Click on Documents Tab.

121. How to check libraries in salesforce lightning?

Libraries in salesforce lightning available in Files, to Open click on App Launcher -> Files -> Libraries

122. what is publisher layout?

Publisher layout is used to where to locate Global Action in salesforce. Global publisher layouts determine the global actions that appear in the various Salesforce interfaces. In Salesforce Classic and Lightning Experience, these layouts customize the actions on global pages (like the Home page) and on the Chatter page

123. What is app?

Apps in salesforce is collection of Items like objects and pages etc.. Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps

124. how many ways to remove visibility of any app in salesforce?

1. App Menu -> Click on Hide button
2. Open App Manager -> Edit and remove assigned profiles
3. Open Profile - > assigned apps

125. How to add objects as tabs for any app?

Click on Edit on App in App Manager, Go to Add Utility items and select & Add Objects.

126. What are the types of apps?

Regards to Platform

- Classic App
- Lightning App
- Connected App

Regards to Behavior

- Standard Navigation
- Console

127. How many lightning pages we have? and what are those?

We have 3 types of Lightning pages in salesforce App Builder.

1. App Page
2. Home Page
3. Record Page

128. What is home page, app page and record page?

- **App Page:** is the default landing tab for when you switch to an app in Lightning.
An app page to create a home page for a third-party app that you can add directly into the Salesforce mobile app and Lightning Experience navigation menus. Your users then have an app home page where they can quickly access the most important objects and items.

- **Home Page:** Custom Home Page is when you want to override the Home tab in Lightning with your custom Lightning component.

- **Record Page:** To create a customized version of an object's record page, tailoring it to your users' needs. Custom record pages are supported in Lightning Experience and the Salesforce mobile app.

129. What in Email Template?

Email templates to increase productivity and ensure consistent messaging. Email templates with merge fields let you quickly send emails that include field data from Salesforce records like contacts, leads, or opportunities. You can use email templates when emailing groups of people—with list email or mass email—or just one person.

130. what are the different types of email templates?

1. Text Email Templates
2. HTML (Using Letterhead) Email Templates
3. Custom (without using Letterhead)
4. Visualforce

131. what is email alert and whom we can add as recipients?

Email alerts are emails generated by an automated process and sent to designated recipients. These actions consist of the standard text and list of recipients for an email. You can associate email alerts with processes, flows, workflow rules, approval processes, or entitlement processes.
We can add recipients as any user, Role, Group or Related user(User lookup Field), Creator of record, owner of record and email fields

132. To How many email ids you can send from an email alert for outside salesforce?

We can add and send 5 email ids to send outside salesforce

133. what is Automation process/process automation in salesforce?
Instead of relying on your users to perform each part of a business process, automate it! The benefits are two-fold: your users can spend their time on other tasks, and you can trust that the process is always done just so. Salesforce offers tools to automate several kinds of business processes: guided visual experiences, behind-the-scenes automation, and approval automation.

134. what are the different types of automation process we have?
1. Approval process
2. Workflow rules
3. Process Builders
4. Lightning Flows
5. Einstein Next best action(new Feature release)

135. what is workflow rule and actions you can perform with that?
Workflow rule is to automate any business process instead of relying on user to update manually, its one of the automation process. By using work flow rules we can do below actions
1. Create Task
2. Send an email alert
3. Update fields
4. Send an out bound message

136. what are the evolution criteria's in workflow rule?
Evolution Criteria in workflow rules is used to set or configure when you want to trigger the workflow rule
1. Created
2. Created /updated
3. Created/updated and subsequently meet the criteria.

137. what timebound action workflow rule?
In workflow rules the 4 action what we can do we can setup as immediate action or timebound work flow action. In TimeBound work flow actions we set a time after when the actions has to be performed once the work flow is triggered.

138. what is approval process?
Approval Process in Salesforce is an automated process that automates how Salesforce records are approved in your org. Approval Process in Salesforce is a combination of steps for a record to be approved/rejected either by a user, queue or public groups

139. what are the 2 types of approval process creation?
1. Jump Start wizard
2. Standard Setup wizard

140. what is approval step?
Approval step is one of the criteria we can set to define different hierarchy or process of approvers for a record in approval process. Its will trigger and perform based on criteria matches and send for approvers we select.

141. How many workflow rules we can activate on one object?
By default, each object (or entity) is limited to 50 active workflow rules. Additional volume is available (up to 300 active workflow rules,) but we instead recommend the use of the Process Builder.

142. what are the advantages/differences of process builder over workflow rule?

Side-by-side: Process Builder versus Workflows

	Process Builder	Workflows
Ability to see process visually	Yes	No
Update fields on the record	Yes	Yes
Update fields on a related record	Yes	Only Parent record
Create records	Yes	Task records only
Send an Email Alert	Yes	Yes
Send an Outbound Message	No	Yes
Can insert/update an ID field?	Yes	No
Launch a Flow	Yes	No
Invoke an Apex Class	Yes	No
Submit record for Approval	Yes	No
Post to Chatter	Yes	No
Support time-based actions	Yes	Yes
Control the order of process steps	Yes	No
Support for bulk record inserts/updates	Yes, in most situations	Yes

143. What are the actions you can create from process builder?

- Create a record of any object type
- Update any related record—not just the record or its parent
- Use a quick action to create a record, update a record, or log a call
- Invoke a process from another process
- Launch a flow—you can't schedule this action with workflow
- Send an email
- Send a custom notification
- Post to Chatter
- Submit a record for approval

144. Can you relate one object from process builder which should not have any relationship with main object you selected in process builder?
No, we cannot

145. What is deployment?
To move components/metadata from one salesforce org/environment to another is called deployment.

146. What are changesets and types of changesets?
Changesets is the one of the way/process in salesforce to do deployments. Speciality is changesets are with in salesforce but it does not support version control. We have many tools supports Version control and devops in market.

147. What is source org and Target org?
Source Org: The salesforce environment where we developed new components and want to deploy to other org.
Target Org: The salesforce environment to which you want to receive new developed components from source org.

148. Difference between custom page layout and lightning record Pag layout?
Custom page layout is where you can add fields , buttons, Actions to be want to display in detail page and also related objects to be want to display in related Tabs.
Lightning Record Page is layout where you can customize your record page screen with different widgets/components like Details, Tabs, chatter, activity, Reports and custom components (VF page, Lightning component, dashboards etc..)

149. How many portals available in salesforce?

There are 3 types of Salesforce.com Portals.
1. Self-Service portal
2. Partner Portal
3. Customer Portal

Self-Service portal:- Self-Service provides an online support channel for your customers – allowing them to resolve their inquiries without contacting a customer service representative.

Partner Portal:-Partner Portal is to support your Partners. Partner users are Salesforce users with limited capabilities. They are associated with a particular partner account, have limited access to your organization's data, and log in via a partner portal.

Customer Portal:- A Salesforce.com Customer Portal is similar to a Self-Service portal in that it provides an online support channel for your customers—allowing them to resolve their inquiries without contacting a customer service representative.

150. What is fiscal year?
fiscal year or financial **year** is a **period** of time used to calculate annual (yearly) financial statements in businesses and other organizations in salesforce

151. How to manage currencies?

Setup→ Type Manage Currencies → Edit as per standard Currency of your salesforce org.

152. Where you do translation for managed objects?

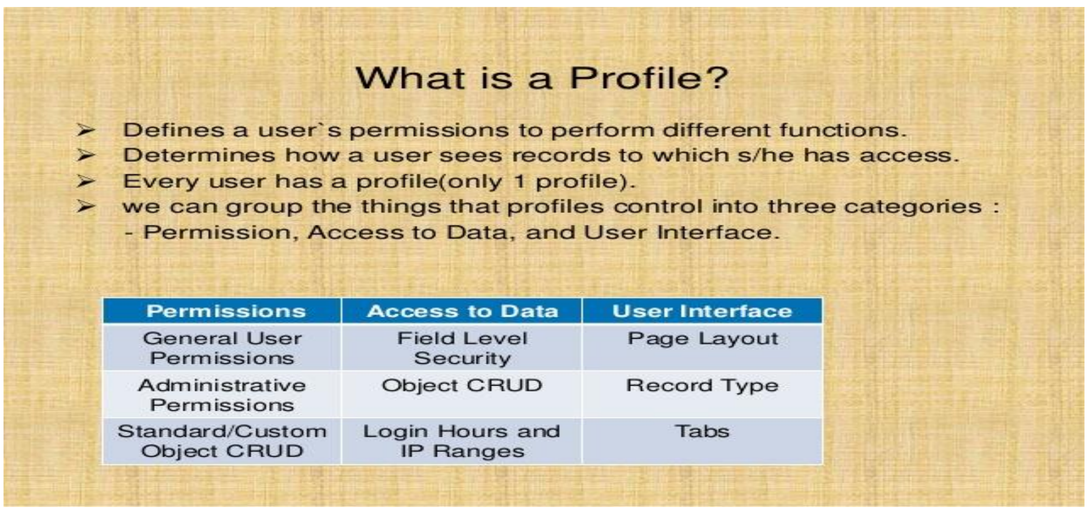
Under Translation → Override

153. Difference between profiles and permissions sets?

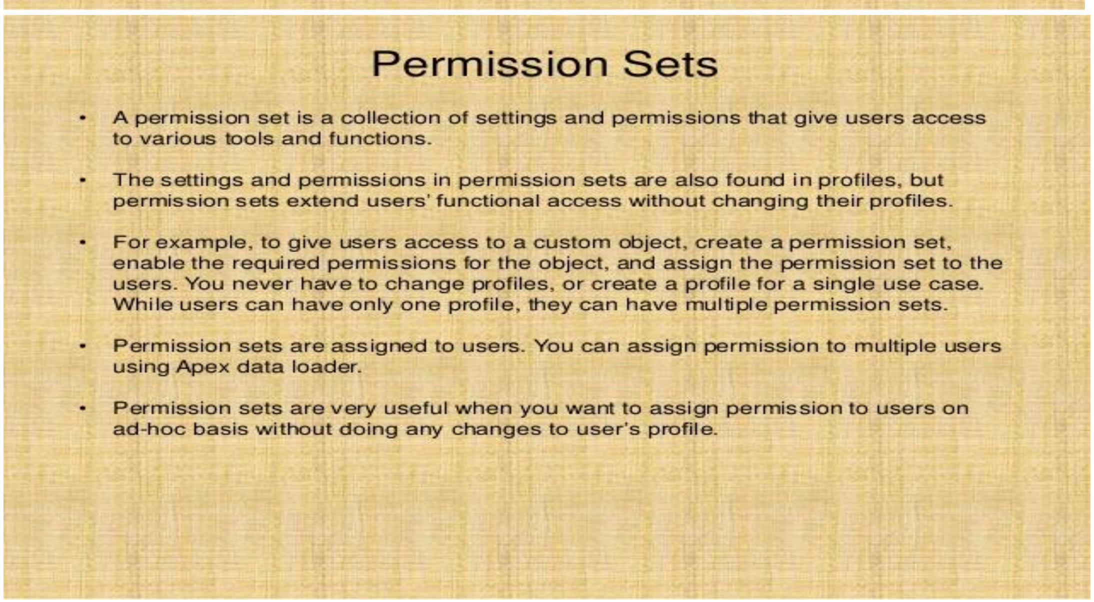
The key difference between the two is that the Profile is the users base set of permissions and all users are assigned to one. ...

Profiles can be used to give or take away permission from the users assigned to it.

Permission Sets can only give or extend permission to the users assigned to it.



Permissions	Access to Data	User Interface
General User Permissions	Field Level Security	Page Layout
Administrative Permissions	Object CRUD	Record Type
Standard/Custom Object CRUD	Login Hours and IP Ranges	Tabs



154. What are governor limits in salesforce?

Salesforce Governor Limits are usage caps enforced by Salesforce to ensure efficient processing. They allow for multiple users of the platform without impeding performance.

There are many types of governor limits in salesforce. For more information: https://developer.salesforce.com/docs/atlas.en-us.salesforce_app_limits_cheatsheet.meta/salesforce_app_limits_cheatsheet/salesforce_app_limits_platform_apexgov.htm

155. What are SOQL or SOSL Limits in salesforce nothing pre-transaction limits?

Description	Synchronous limits	Asynchronous limits
Total SOQL Queries used	100	200
SOQL Queries retrieved records	50,000	
Issued SOSL Queries	20	
Issued DML Statements	150	
The total amount of callouts per transaction	100	
Allowed send email Methods	10	
Apex transaction execution time	10 minutes	
Salesforce Servers CPU time	10,000	60,000

156. Limitations of workflow Rule?

For each workflow rule, you can have the following:

- 10 time triggers
- 40 immediate actions
- 40 time-dependent actions per time trigger

• For both immediate and time-dependent actions in one workflow rule, there can be no more than:

- 10 email alerts
- 10 tasks
- 10 field updates
- 10 outbound messages

- **The workflow time trigger per hour limit for different editions are as follows:**

  Professional Edition: 250
  Enterprise Edition: 500
  Developer Edition: 50
  Unlimited and Professional Edition: 1,000

- **The workflow e-mail limit per day is as follows:**

  1,000 per Salesforce standard license
  200,000 per organization

157. Limitations of workflow Rule?

- 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 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.
- The workflow rule evaluation criteria is set to Evaluate the rule when a record is: created, and every time it's edited.

158. In which criteria of a workflow – "time dependent workflow action" cannot be created?

Time dependent workflow action cannot be create for: "created, and every time it's edited".

159. 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?

Even after deactivation of workflow,its action will be active in queue

160. We have "Time Based Workflow" and there is action scheduled to be executed. Can we delete that workflow?

If a workflow has any pending time dependent action, then we cannot delete the workflow

161. How to clear the Time based workflow action queue?

Two ways to achieve this:
1. Make criteria false for all those records.
2. Navigate to "Set up | Monitoring | Time Based Workflow", search for scheduled actions and remove from queue.

162. While creating workflow on Task, what difference observed on available actions?

"Send Email" action is not available while creating workflow on task.

163. What are the different types of dashboard components.

1. Chart: Use a chart when you want to show data graphically.
2. Gauge: Use a gauge when you have a single value that you want to show within a range of custom values.
3. Metric: Use a metric when you have one key value to display.
    Enter metric labels directly on components by clicking the empty text field next to the grand total.
    Metric components placed directly above and below each other in a dashboard column are displayed together as a single component.
4. Table: Use a table to show a set of report data in column form.
5. Visualforce Page: Use a Visualforce page when you want to create a custom component or show information not available in another component type
6. Custom S-Control: Custom S-Controls can contain any type of content that you can display or run in a browser,for example,a Java applet,an ActiveX control,an Excelfile, or a custom HTML Web form.