

1.

Q : What is Salesforce?



A : Salesforce is the world's most popular CRM system.
Many companies and customers rely on this dynamic, web-based, low-cost CRM platform.
It was founded in March 1999 by former Oracle executive Marc Benioff.
Salesforce CRM provides a complete feature-rich solutions for marketing, sales, services, health, non-profit, education, partner & community management etc.

2.

Q : What is CRM?



A : It stands for **C**ustomer **R**elationship **M**anagement

Broadly defined, CRM is a strategy for managing a **company's interactions with clients and sales prospects** and ensuring the 'Connect' sustains throughout the relation.

3.

Q : Editions in Salesforce?

A :

- Personal Edition
- Group Edition
- Professional Edition
- Enterprise Edition
- Performance Edition
- Unlimited Edition
- Developer Edition
- Contact Manager Edition

Salesforce Editions

1. Essentials

- Very basic CRM (for small businesses).
- Limited customization, only up to 10 users.
- Rarely used in big real-time projects.

2. Professional

- More features than Essentials.
- No advanced automation (like coding/triggers).
- Usually for small-to-medium businesses.

3. Enterprise (Most Common in Real-Time)

- Includes **Apex, Triggers, APIs, Workflow, Profiles, Permission Sets, Custom Objects** etc.
- Used by mid-size to large companies.
- **This is the most widely used edition in real-time Salesforce projects.**

4. Unlimited

- Everything from Enterprise + more (like unlimited custom apps, more storage, premium support).
- Used by **large enterprises** that need high scalability.

5. Developer Edition

- Free edition provided for **learning, development, and testing**.
- Comes with all core features (Apex, API, Lightning, etc.), but with **limits** (small data storage, limited users).
- Not used in real-time for business, only for **developers**.



Real-time Usage

- **Enterprise Edition** → **70%+ companies** use this in production.
- **Unlimited Edition** → **big enterprises** (like banks, telecoms, MNCs).
- **Developer Edition** → for **learning, sandboxing, and coding practice**.



So in short:

In **real-time projects**, Salesforce **Enterprise Edition** is the most

commonly used.

For **learning & practice**, you use **Developer Edition** (the free one Salesforce gives you).

4.

Q : Licenses in Salesforce?



A :

- Salesforce Users
- Salesforce Platform and Lightning Platform Users
- Chatter Plus Users (Chatter Only), Chatter Free Users, Chatter External Users
- Customer Community, Customer Community Plus, and Partner Community External Users
- Portal Users who are a member of a Salesforce Community

5.

Q : What is Object?



A : An Object is similar to a database table in Salesforce where you can store information.

Object can be:

	Standard	Custom
Label	Account	Student
Plural Label	Accounts	Students
API Name	Account	Student__c

6.

Q: What is Field?



A:

- A field is like a database column.
- There are various data types available in Salesforce to create fields.
- By entering values in fields, we create a record in Salesforce.
- Field can be standard as well as custom.

7.

Q: What is Tab?



A:

- Clicking on Tabs we can navigate around an app.
- Every tab serves as the starting point for viewing, editing and entering information for a specific object.
- When we click a tab, the corresponding home page for that object appears.
- For example, if we click the Accounts tab, the Accounts tab home page appears. It gives you access to all of the account records. We can view details of a particular record by clicking on it.

8.

Q : What is App?



A :

- An App is a container for all the objects, tabs and other functionality.
- It is similar to a programming project where we keep all our code files.
- In Salesforce App consists simply of a name, a logo, and an ordered set of tabs.

9.

Q : What is Record?



A :

- Records are the rows(entries) in object which are uniquely identified by there ids.
- We can create records by entering values in fields available in an object.
- We can create, edit, view and delete a record in Salesforce.

10.

Q : Standard Navigation and Console Navigation Apps?



A :

Standard Navigation opens one record at a time on the Page where as in Console Navigation if you open more than one records so they are opened in sub tabs together.

11.

Q : Name Datatypes to create fields?

- A :**
- Auto Number
 - Formula
 - Roll-up Summary
 - Lookup Relationship
 - Master-Detail Relationship
 - External Lookup Relationship
 - Checkbox
 - Currency
 - Date
 - Date/Time
 - Email
 - Geolocation
 - Number
 - Percent
 - Phone
 - Picklist
 - Picklist (Multi-Select)
 - Text
 - Text Area
 - Text Area (Long)
 - Text Area (Rich)
 - Text (Encrypted)
 - Time
 - URL

12.

Q : What is Lookup Relationship?



A :

Creates a relationship that links one object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list.

The other is the source of the values in the list.

13.

Q : What is Master-Detail Relationship?



A :

Creates a special type of parent-child relationship between two objects. One is known as child/detail where we create master-detail relationship field and another one is known as parent/master.

- Required on all detail records.
- Ownership and sharing of a detail record is determined by the master record.
- If user deletes the master record then all detail records are deleted.
- One can create rollup summary fields on the master records so that detail records can be summarized.

Lookup	Master
1. optional	1. Mandatory
2. if parent deleted then child respective lookup data deleted	2. If parent record deleted, then all respective c records deleted
3. 40	3. limit is 2
4. Rollup Summary disabled	4. Enabled
5. Aggregate functions not available	5. Aggregate functions will be available
1. COUNT 2. SUM 3. MIN 4. MAX	1. COUNT 2. SUM 3. MIN 4. MAX

14.

Q : What is Rollup Summary Field?



A :

- A read-only field that displays the sum, minimum or maximum value of a field in a related list.
- This field also can count all records available in related list.
- Rollup Summary field is always created on parent object.

15.

Q : Can we convert Lookup to Master-Detail?



A :

Yes, but first you need to populate values in lookup field on each record available on the object.

16.

Q : Can we convert Master-Detail to Lookup?



A :

Yes, but if you have created rollup summary fields then you need to delete those fields before converting master-detail to lookup.

17.

Q : Many-to-Many Relationship?



A :

This can be implemented with the help of Junction Object.

Example :

Object 1 : Class

Object 2 : Student

Junction Object : Create lookup/master-detail field one related to Class and another related to Student Object.

18.

Q : What is Formula Field?



A :

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

19.

Q : Difference b/w Picklist and Multi-select Picklist ?



A :

Picklist - User can select one option.

Multi-Select Picklist - User can select one or more option together.

20.

Q: What is Global Picklist ValueSet?



A:

Global picklist value set can be used by any picklist or multi-select picklist in any object.

21.

Q: What is Field Dependency?



A:

Create a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.

- The field that drives filtering is called the "controlling field." Standard and custom checkboxes and picklists with at least one and less than 300 values can be controlling fields.
- The field that has its values filtered is called the "dependent field." Custom picklists and multi-select picklists can be dependent fields.

Dependent Relationship in Salesforce

1. Field Dependency (Most Common Meaning)

- A **dependent picklist** is a picklist whose available values **depend on the value selected in another field** (called the **controlling field**).
- This is used to guide users and prevent invalid data entry.

✓ Example:

- **Controlling Field:** Country
- **Dependent Field:** State
- If Country = India, show AP, Telangana, Karnataka.
- If Country = USA, show California, Texas, New York.

22.

Q: What is Page Layout?



A:

Page layout is used to display field values for records. Through page layout we can control related lists as well.

23.

Q: What is Compact Layout?



A:

Compact Layout is used to display selected fields and buttons on the page. It is also shown when we hover on the lookup relationship field.

Not all field types are supported. The following **data types** are **NOT supported** in Compact Layouts:

1. Long Text Area
2. Rich Text Area
3. Multi-Select Picklist
4. Text Area (plain)

Page Layout = Full record page (detailed view).

👉 **Compact Layout = Small summary (top highlight panel / hover preview).**

Compact Layouts are only available in Lightning Experience and Salesforce Mobile App.

Not available in Classic UI.

Compact Layout controls **which fields appear in the header (highlights panel)** of a record page in Salesforce (Lightning & mobile app).

It gives users a **quick view of the most important information** without scrolling.

24.

Q : What is Related List?

A :

When lookup and master-detail relationship fields are created then on parent object related lists will be available. Through related list we can view child object records on parent object.

A **Related List** is a section on a record's detail page that shows **related records from another object**.

It appears **below the record details** and helps users see and manage **child or related data** without navigating away.

A **Related List** displays **all records related to the current record**, based on defined relationships, allowing quick access and management.

25.

Q: Types of Lightning Pages?

A:

- App Page
- Home Page
- Record Page

- In **Lightning Experience**, we use **Lightning App Builder** to design record pages, add related lists, tabs, components, etc.
- In **Salesforce Classic**, there's **no App Builder**. Instead, everything is managed through **Page Layouts** and **Related Lists**.

Here's how it works in **Classic** (like in your screenshot):

1. Relationship Field Setup

- First, the Patient info object has a lookup or master-detail field to the Doctor Info object.
- This creates the parent-child relationship.

2. Page Layout Control

- Go to **Setup → Customize → Doctor Info → Page Layouts**.
- Edit the layout for Doctor Info.
- In the **Related Lists** section, drag the **Patient infos related list** onto the layout.

- Save it.

3. Result

- When you open a **Doctor Info** record in Classic, Salesforce shows the **Patient infos related list** automatically (like in your screenshot).
- Each Patient record that has this Doctor selected in its lookup field will show up there.

👉 So in Classic: **Page Layouts + Related Lists** replace what Lightning App Builder does.

in Lightning Experience

- You get **Lightning App Builder**, which is much more powerful.
- You can design **Record Pages** (like Doctor Info page) with drag-and-drop.
- Components you can add:
 - **Related Lists** (like Patient infos)
 - **Tabs**
 - **Report Charts**
 - **Custom Components (LWC/Aura/Visualforce)**
- You can show/hide sections using **Dynamic Forms** and **Visibility Rules**.

26.

Q : Component Visibility?



A :

Component Visibility helps to apply filter criteria to control whether component should be visible on the page or not.

27.

Q : What is Validation Rule?



A :

To apply custom validation we can build validation rules. Validation rule fires when the defined criteria matches upon record insert, update & delete.

28.

Q : What is Feed Tracking?



A :

Feed Tracking enables to track changes of selected fields and related record fields as well. Changes are shown in the chatter component. It shows old value, new value and who changed.

29.

Q : What is Field History Tracking?



A :

- Field History Tracking enables to track changes of selected fields.
- Changes are shown in the History related list.
- It shows old value, new value and who changed.

The changes will be seen in the history related field.

Field History Tracking = Audit log of field changes (old value → new value).

Feed Tracking = Chatter updates about field changes (for collaboration).

30.

Q : What is Activity Component?

A :

- Activity Component enables users to use following actions:
 - Event, Task, Email, Log a Call

31.

Q : What is Chatter Component?



A :

- Chatter Component is used to track feeds, users can post content on records also they can mention other users.

32.

Q : What is Duplicate Rule & Matching Rule?



A :

Duplicate Rule : Prevent creation of duplicate records. It shows either warning or block record creation and updation in case of duplicates. We can create reports on duplicate records as well.

Matching Rule : Here we need to set the criteria for duplicate check.

Matching Rule = Defines duplicate condition

Duplicate Rule = Defines duplicate action

Works in **UI (Classic + Lightning)**

Works in **API/Dataloader** if rule is set to “Enforce Sharing Rules”

33.

Q : What is List View?



A :

- List View shows lists of records available under object. We can choose which fields to display in list view.
- We can also apply sharing and filters on list view.

34.

Q : What is Record Type?



A :

- Record Type helps to launch different page layouts and can show different picklist values for different layout.

35.

Q : What is Schema Builder?



A :

- Schema Builder helps to view objects in pictorial representation.
- One can see the relationships between multiple objects.
- One can create Objects and Fields through schema builder as well.

36.

Q : What is Email Template?



A :

- Email Templates contains messages and merge fields that can be sent through automation tools like flow or trigger.

Types : Classic Email Template (Text, HTML, Custom, VF)
Lightning Email Template

37.

Q : Global Action Vs Object Specific Action?



A :

- **Global Action :** One can execution operation without open any record on object.
- **Object Specific Action :** Can be executed through records of an object.

38.

Q : What is Sales Process?



A :

- One cannot control Stage picklist values of Opportunity object through record type.
- So one can Create a Sales Process to control Stage picklist values of Opportunity object for different Record Types.

Stage is a **picklist field** that represents the **current status** or **progress step** of a record.

Most commonly used in **Opportunities** (Sales process) → e.g.
Prospecting, Qualification, Proposal, Closed Won, Closed Lost.

But you can also create your own picklist stages for **custom objects** (like Patient Treatment Stage)

Stage Picklist = Progress steps of a record (like pipeline stages in sales, or treatment stages in hospital).

39.

Q : What is Support Process?



A :

- One cannot control Status picklist values of Case object through record type.
- So one can Create a Support Process to control Status picklist values of Case object for different Record Types.

Support Process = Defines which Case Status values are available in a Record Type (used only for Cases).

40.

Q : What is Lead Process?



A :

- One cannot control Status picklist values of Lead object through record type.
- So one can Create a Lead Process to control Status picklist values of Lead object for different Record Types.

41.

Q : What is Setup Audit Trails?



A :

- Setup Audit Trails shows a list of changes done by users in the org in different components.
- One can download past 6 months changes.

42.

Q : Different ways to make a field required?

A :

- Field itself
- Page Layout
- Validation Rule
- Trigger

Q : Different ways to make a field read only?

A :

- FLS (Field Level Security)
- Page Layout
- Validation Rule
- Trigger

44.

Q : What is help text?



A :

- Help text shows additional information about a field. It is optional to have help text for fields.

45.

Q : What is Data Import Wizard?



A :

- It helps to import data from excel/csv format into Salesforce.
- One can find this in setup.
- One can import upto 50,000 records at a time.
- One can perform insert, update & upsert operations.

46.

Q : What is Data Loader?



A :

- It helps to import data from excel/csv format into Salesforce.
- One has to install it in the computer through setup.
- We can import upto 5,000,000 records at a time.

47.

Q : Operations in Data Loader?

A :

- Insert
- Update
- Upsert
- Delete
- Export
- Export All (includes deleted records as well)