04.08.25

SALESFORCE - Important Interview Questions

Slack channel - joining

1. How to create relationships ?

[how to establish a relationship]

ans :

Lookup Relationship - Loosely coupled

- on a note we can add **40** lookup relationships
- you can create **500** fields per a custom object
- **2** MDR [Master Detailed Relationship]

IMPORTANT QUESTIONS ASKED IN THE INTERVIEW

1. Difference between MDR and Lookup relationships ?
2. What is MDR ?
3. What is lookup relationship ?
4. How many lookup and MDR relationships can be created ?
5. How many fields are there in a custom object ?

Hands on demonstration

Relationship between mentor and student ?

ans :

mentor - one object

student - many objects

we need to create from many object -> one object

Steps:

1. setup
2. object manager
3. students
4. Fields and relationships
5. new
6. lookup relationship

7. MDR
8. choose - lookup relationship
9. save - save
10. you can find the differences

object limit : we come to know the limitations of a particular object we are using.

Biheart the object limits table

2. When there is a lookup relationship, How does it behave ?

3. Student and mentor are having loosely coupled relationship ! Why ?

ans :

because when we are creating student details, mentor value is not mandatory. We can give mentor details or can skip the details, there is a possibility for both the actions.

Eg : Student can be with the mentor, a object, area, different different objects.

4. MDR [tightly coupled]

what are the challenges faced when we are transferring a lookup relationship to MDR ?

ans :

Process is same

MDR - Something like parent child relationship

One to many relationships

when student and mentor are having a relationship, the mentor value is important and mandotary.

without the value of mentor we cannot save the record of a student.

100% we need to pick the mentor details then only system allows you to save the data is called tightly coupled.

In a MDR - Child doesnot exist without the parent

Student - child record

mentor - parent record

a student cannot be created without a mentor

a child does not exit without the parent

In a MDR - cascade delution is TRUE

5. What is cascade delution ?

ans :

cascade delution is true in MDR

Not true in Lookup relationship

when a parent detail is deleted, automatically child records also gets deleted. - Fresher IMPORTANT Questions

6.Conversion from lookup to MDR ?

ans:

fields and relationships

1. mentor_name - lookup relationship
2. click on edit - no change
3. pick the mentor_name - click on edit - **CHANGE FIELD TYPE** [Is the key]
4. under change filed type - go to -> **MDR**
5. next - save
6. ERROR - Displaying [cannot create a MDR] Why ?

ans: because we cannot a MDR upon a existing child record without a parent.

There are 2 ways to achive this !!

1. choose the parent value for all the existing child records
2. a.take the backup of the data fullfil with the parent record and insert the data

   b.delete the child record, without parent

7. What are orphan records ?

ans:

A child record which are not having a parent

8. Inline edit

ans:

This is a feature helps to edit the data without on the edit option

Inline edit will be highlighted on the recordpage.

9. lookup filter : lookup filter is a data segregation tool which is used to highlight the related objects data on the record page and the data which floats from one object to the other object.

OR

The data which floats from one object to the other, to segregate the data based on the particular requirements or particular condition.

we can add in a object is 5

Where to find:

Object limits – > lookup filters = 5

10.List view ?

How to create list view ?

Ans :

We can create multiple list views

Why we need list view ?

- List view helps to display the data of a particular object.
- Its like a table format of showing data
- We can edit the fields

11.How to create list view ?

Ans:

1. Setting icon – list view controls
2. New
3. List name – sample list view
4. API Name – sample_list_view
5. Who can see ? -> select any
   Advantage – any user can create the list view

What kind of data it can display ?

Ans:

1. Add filter -> on to the right side
2. Field -> last modified by [pick the related field]
3. Or student email
4. Operator-> equals
5. Value – >empty
6. Save

12.Important Interview question

What are the different sharing options available on a list view ?

Ans :

- Private only for u
- Its for all
- For a particular group

13.Global actions ?

Ans:

We can create multiple global actions and add them where ever we need to display.

How to create global actions ?

Steps:

- Setup
- Actions -> global actions
- Pick anything from the list

14.what is the need of global action ?

Ans:

To make a quicker note or for a contact to be created or an account to be created we use global actions.

15.Page layout ?

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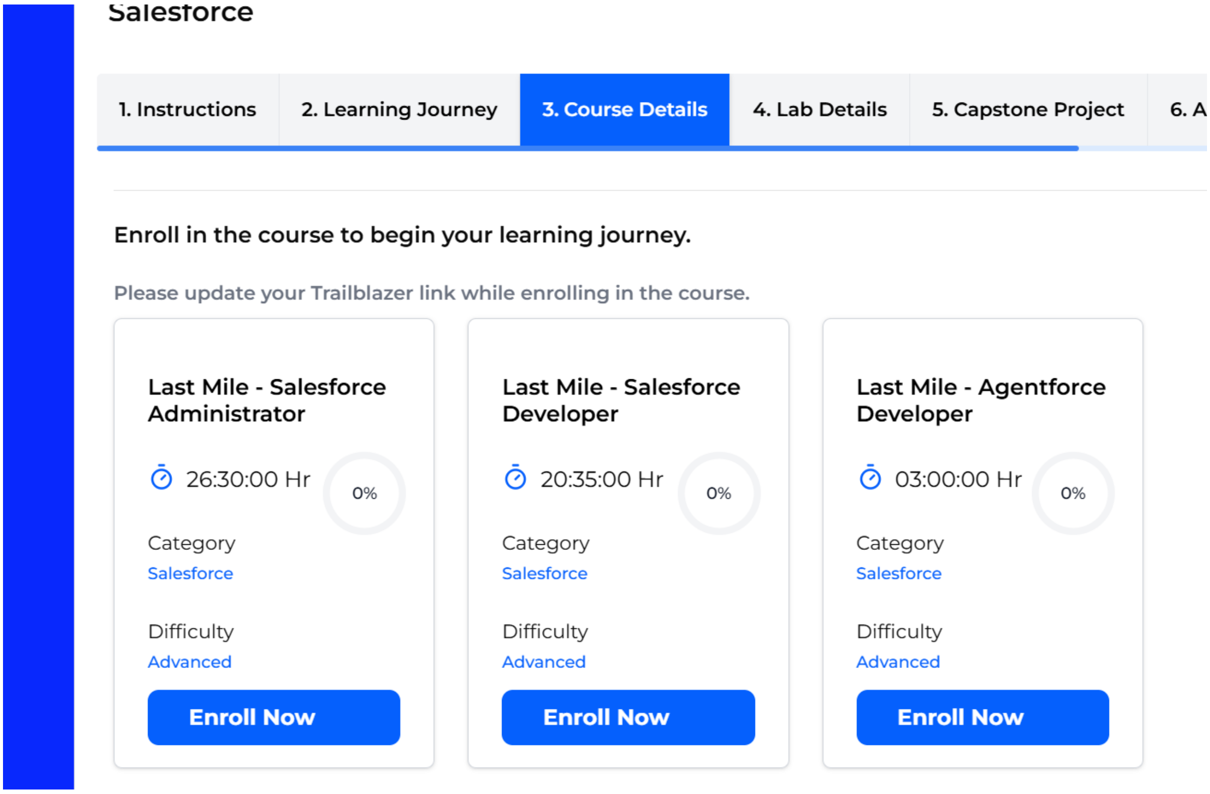
SKILL WALLET -> DEMONSTRATION

1. skill wallet
2. access resource



1.Agent blazer campion

2.Course journey

1. admin module as a object relationships
2. appex spealist
3. liking web components badge

3.After this complete all the trailmix

ASSESSMENT:

2.Converting from MDR to lookup relationship ?

Challenges faced during the conversion

Todays TOPIC -> User Management Role and the profile

Followed with that -> what are queues in the salesforce and why queues are required ?

What kind of activity queues will be doing in the salesforce and how queues are improving the effectivity of handling the sales or service.

USER MANAGEMENT

Example :

Reach to anyone of the consultant company and tell the problem statement to them and based on the problem statement they will create a user story.

Based on the user story they will tell these are all the users and the data model and entire overview that we are going to give to you.

The consultant people will give to the developer to develop that and after that testing will be done and then deployement.

1. **Developing**
2. **Testing**
3. **Deployement**

Developer is the user in the salesforce.

Rakesh -> business owner -> also a user in salesforce

What makes the difference between Rakesh and user in the salesforce as a developer ?

Ans:

The role is different.

1. The user as a developer

- This developer should have particularly configuration settings and customization settings

2. The user as a CEO -> end user

- Should have whole data access
- Rakesh is not supported to customization and configuration
- If I did not reach to consultant ->rakesh need to hire developer, PA, Tester, Deployment manager.

All the above are called users -> who are utilizing the platform

Customers-> whom we updating into the salesforce as an object

How to create user in saleforce -> DEMONSTRATION -> HANDS ON

If we want to create user in the salesforce the major reuirement is **license.**

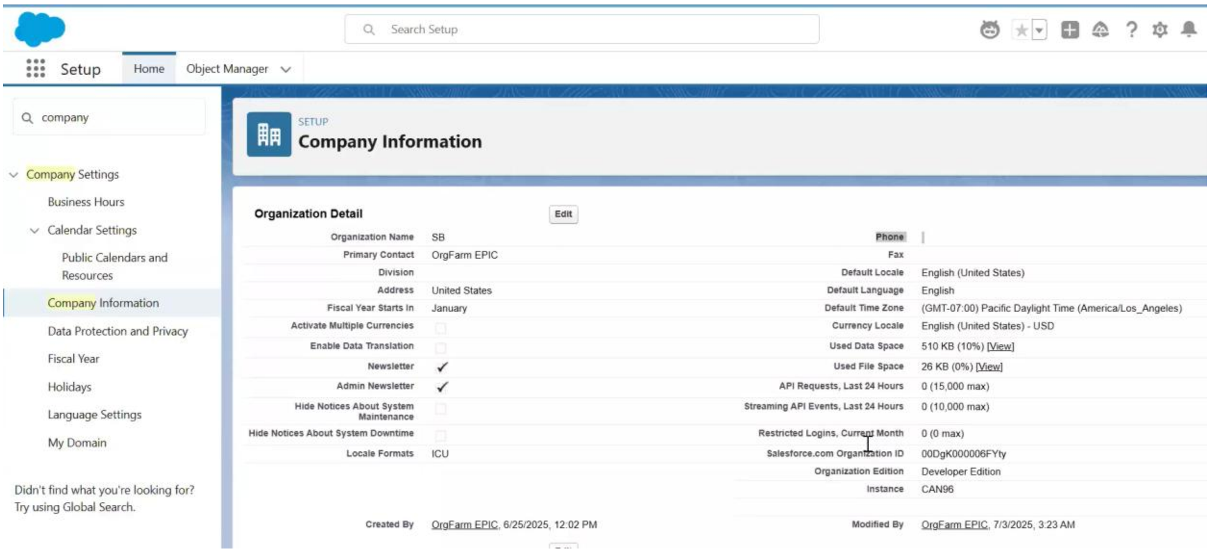
If we want to create 10 sales representatives = require 10 license

Ex: 12 sales excutive = 12 license

Based on the license the data storage increases.

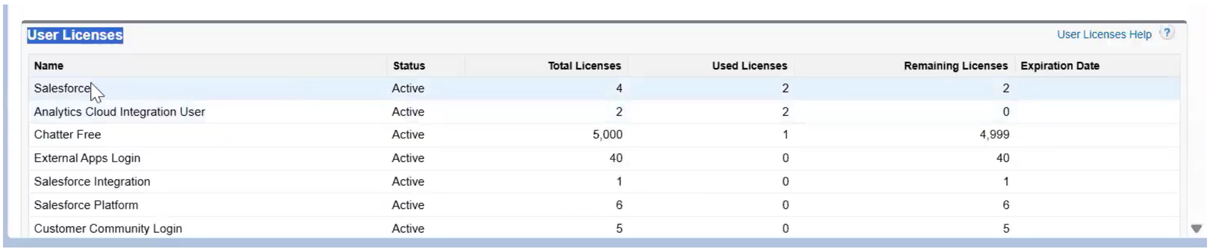
List of license available on the account :

1. Setup
2. Company settings
3. Company information



Instance – CAN96

USER LICENSE – 4

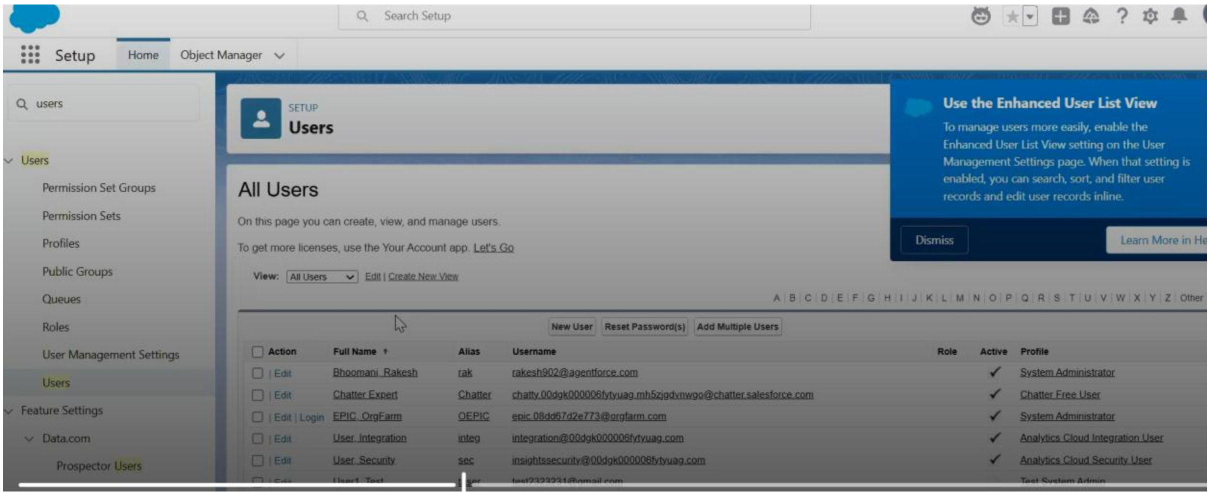


User Licenses | User Licenses Help

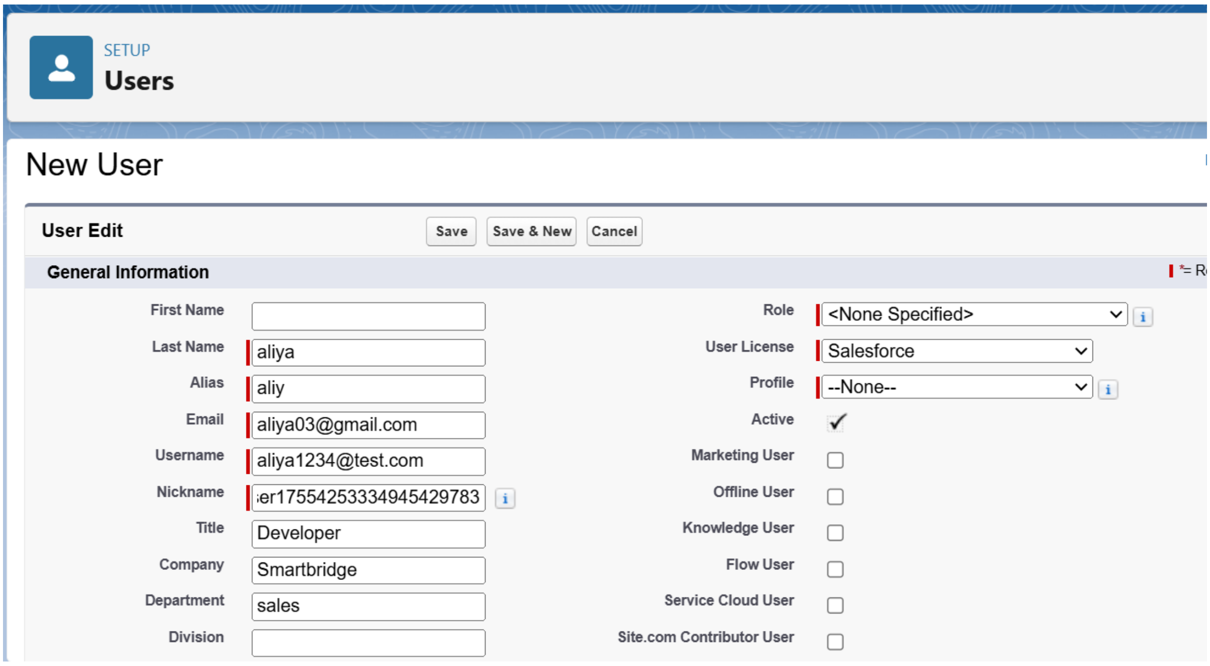
Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	4	2	2	
Analytics Cloud Integration User	Active	2	2	0	
Chatter Free	Active	5,000	1	4,999	
External Apps Login	Active	40	0	40	
Salesforce Integration	Active	1	0	1	
Salesforce Platform	Active	6	0	6	
Customer Community Login	Active	5	0	5	

Steps:

1. SETUP
2. Users
3. Click on users



4. New user button

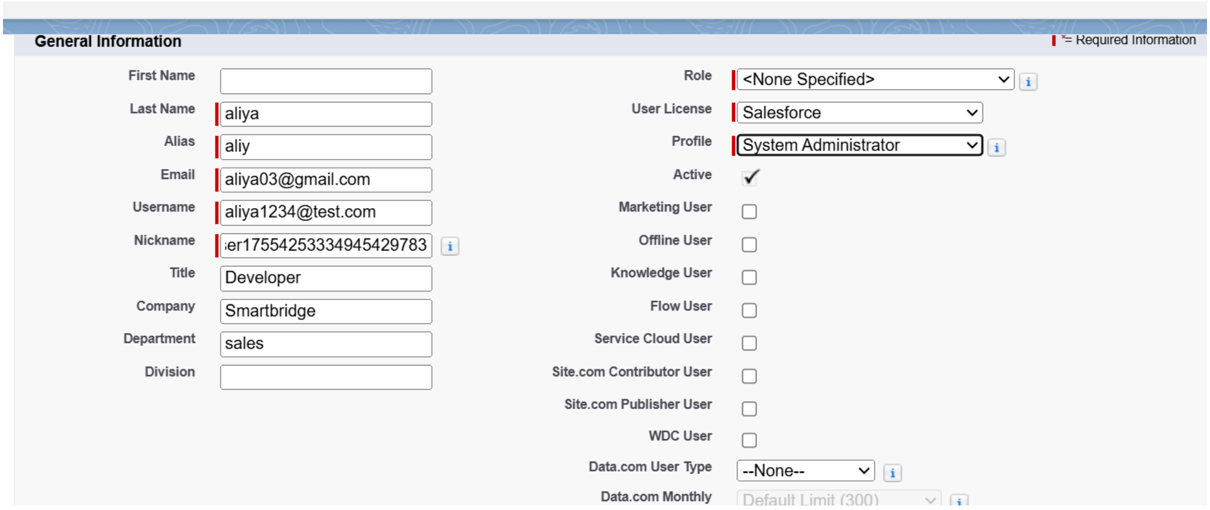


5. **Profile :**
   Profile is something like base level access given to a user
   Each profile is being built on license
   Profile decides who can access and what can be accessed

EXAMPLE :

If profile is having Read license -> read profile -> read user -> whole data in the system

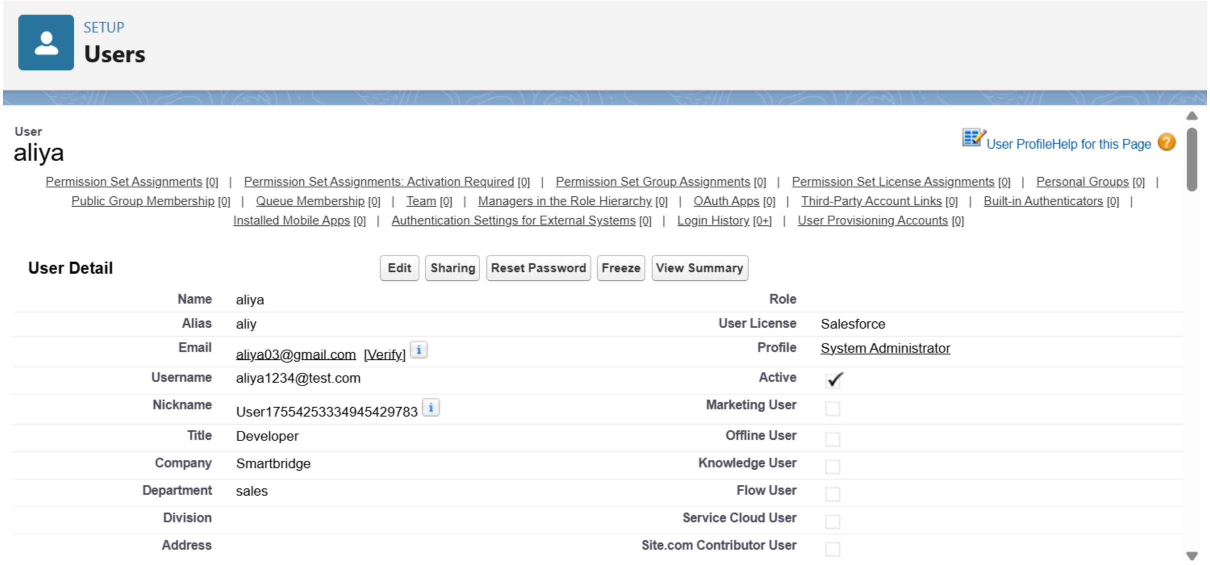
Read license	Read profile	Read user	Whole data
		Read user 2	Student Mentors
			accounts
			contact



Disable the above permission

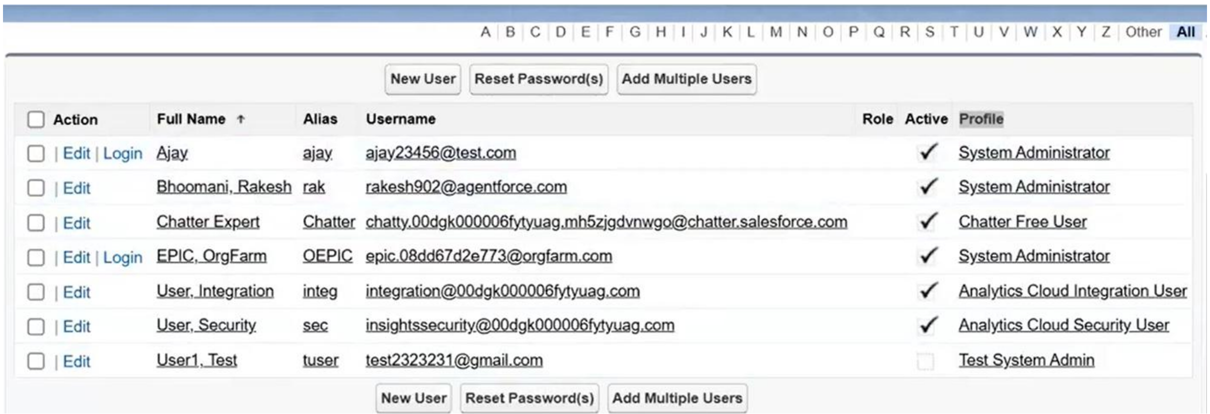
Save

User is ready

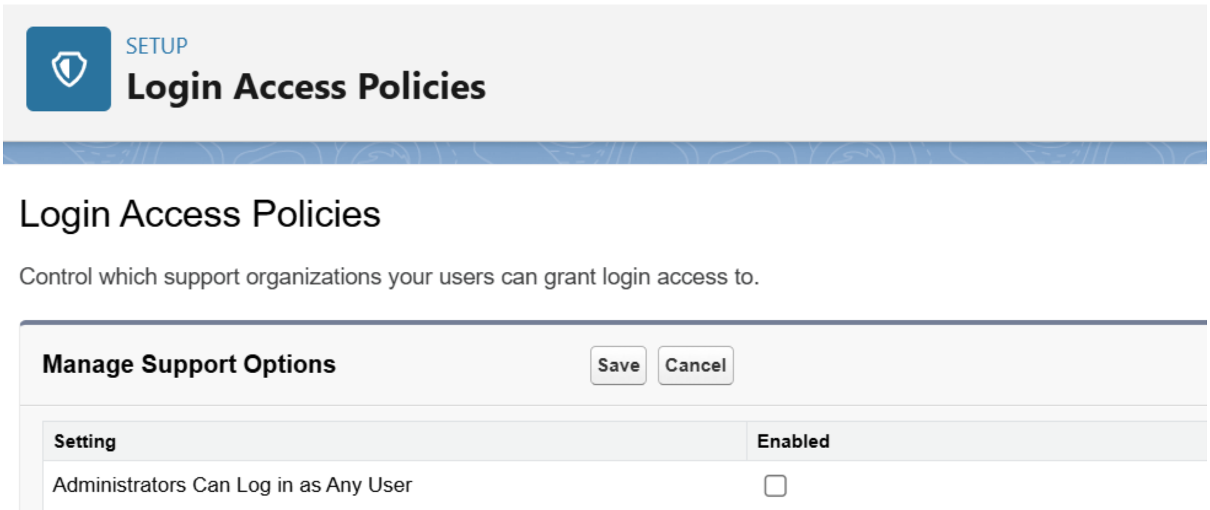


Click on users [on the left side]

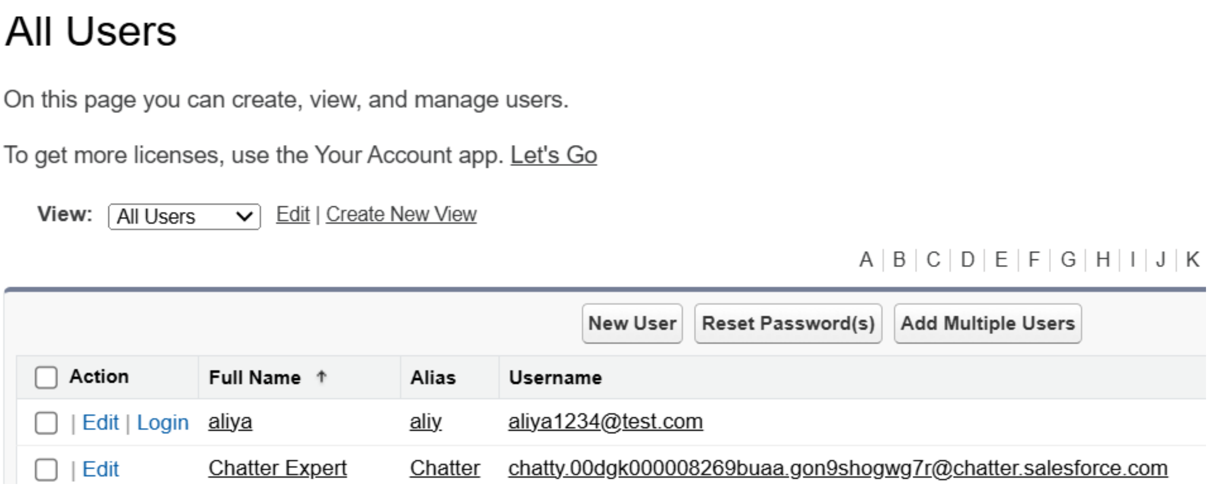
How to get a login button next to the user



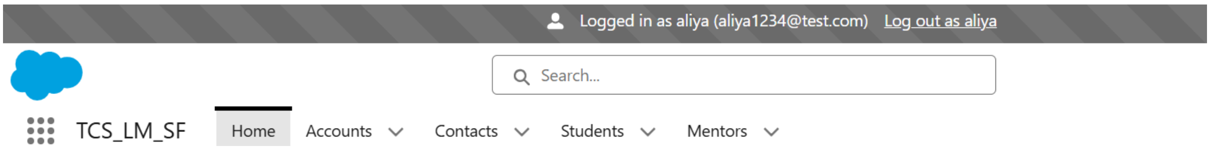
To get the login button -> go to login access policies



Enable the box -> save



Click on login



Q. Can 2 users have same profile ? Imp question

Ans:

YES

Q. can we use 2 profiles for a single user ?

Ans :

No

Note : one profile can be with multiple users

But one user cant be with 2 profiles

Q, can we create a user without a role ?

Ans:

Yes

Q. can we delete user we create in the salesforce ?

Ans:

No

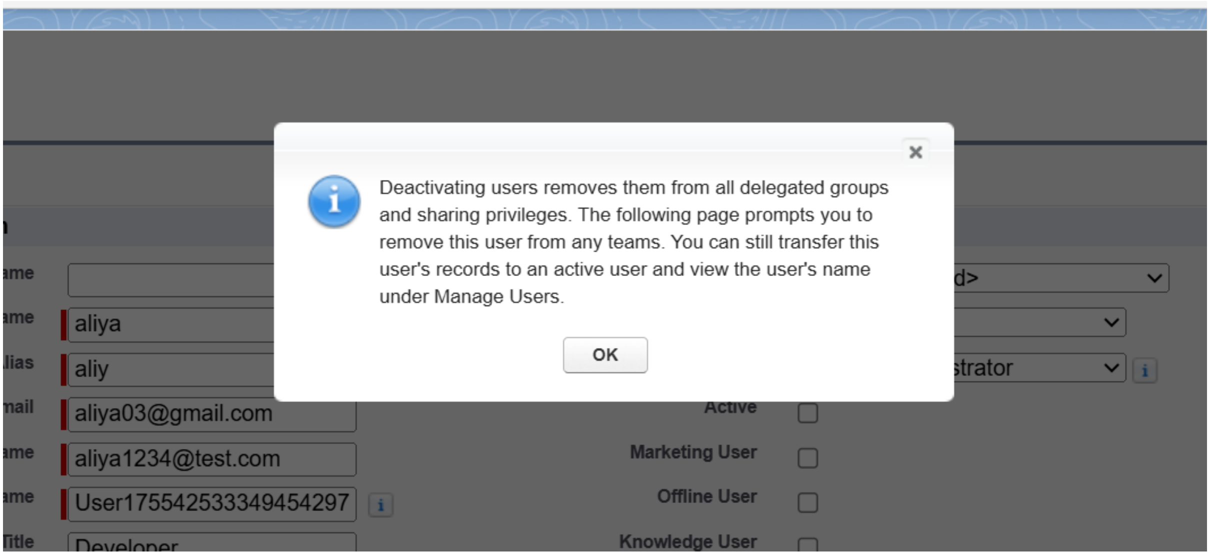
We have a option called deactivating the user

When we deactivate the licence of the user gets deleted and for the same license we can use for other user.

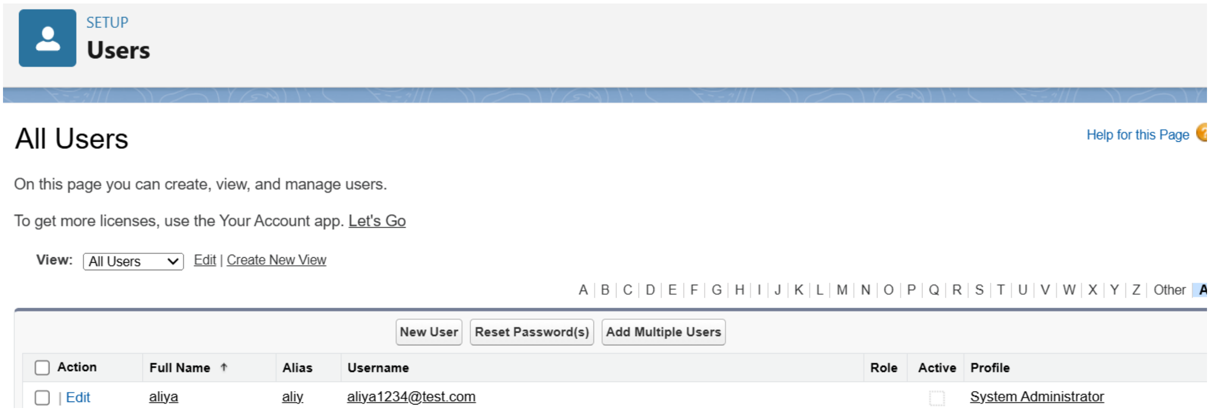
Q. How to deactivate a user ?

Ans:

Go to users -> user lists -> confirm which user we need to deactivate -> click on edit -> botton to active -> disable the active button



Click OK



Disabled

Q. Freeze ?

Ans:

Will use the freeze option particularly when the user is not responding to the particular activity for a long period of time

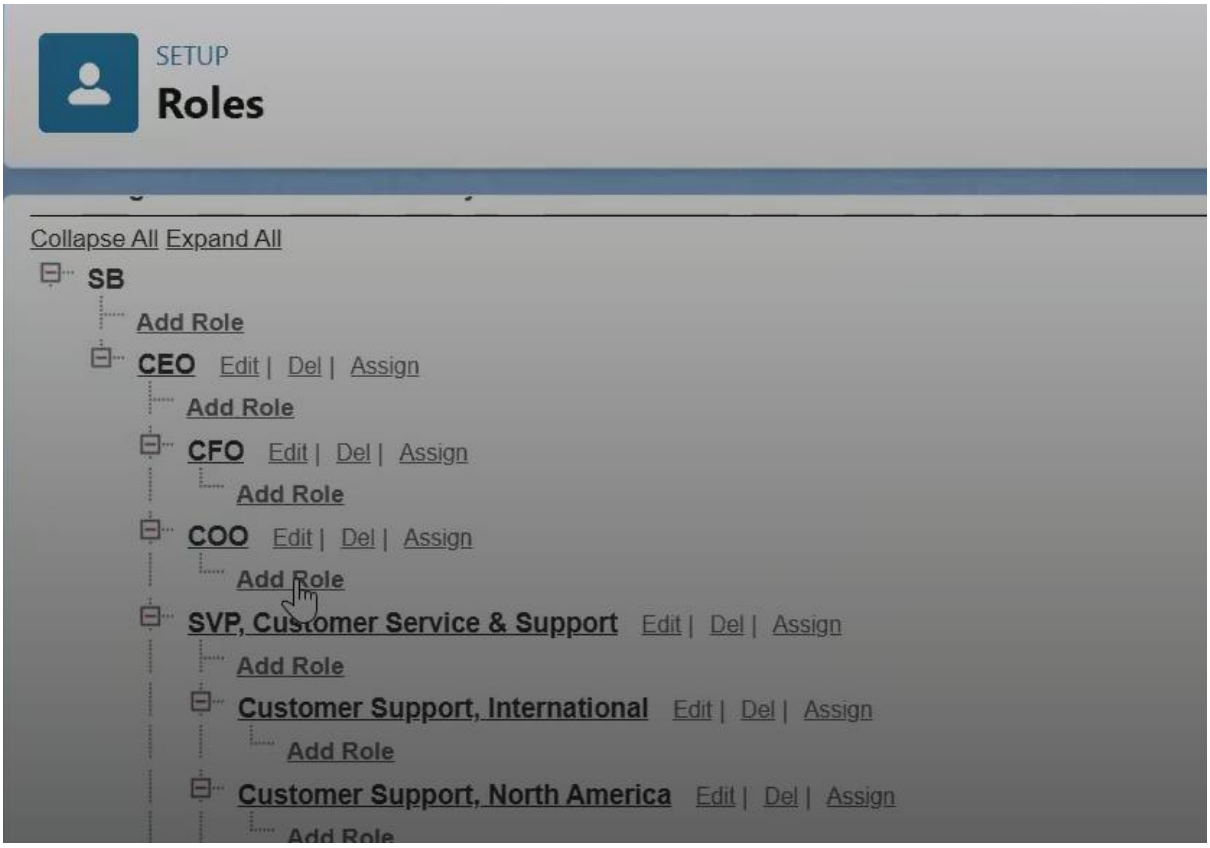
Assignment :

1. **What is role ?**
2. **How to create role ?**
3. **Basic roles on the salesforce ?**

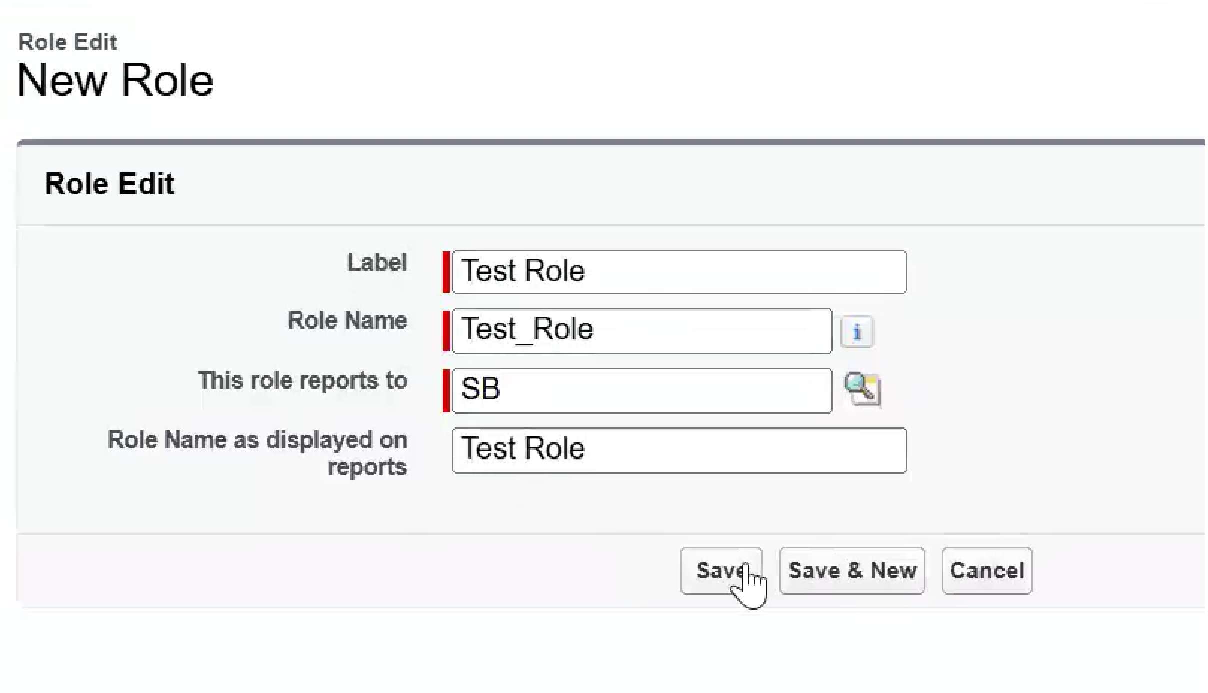
Demonstration:

STEPS:

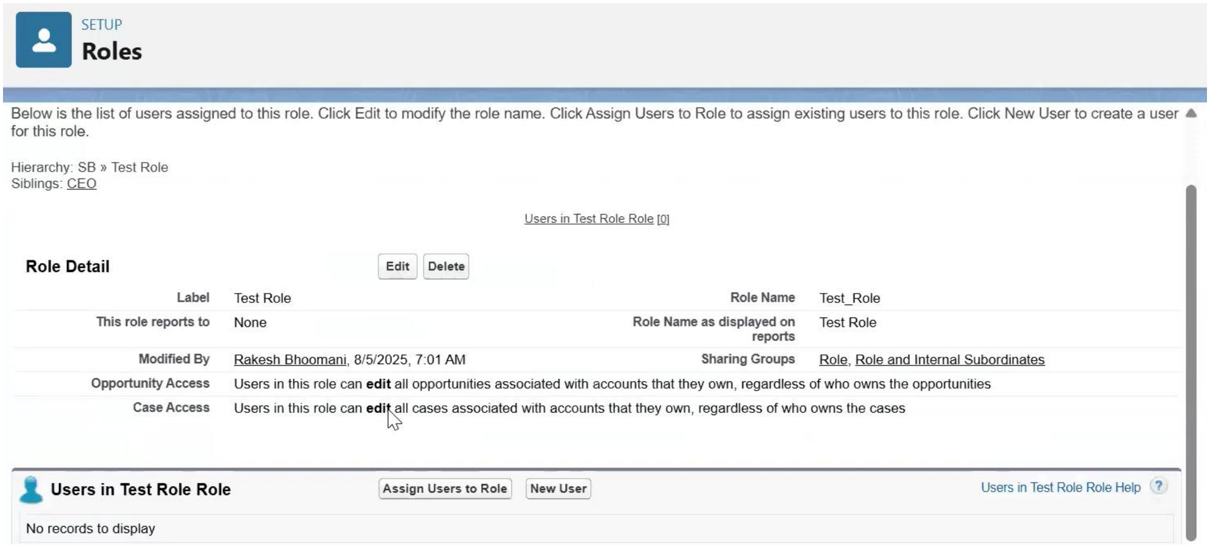
1. Setup
2. Roles
3. Click on roles
4. Click on setup role [at the bottom]
5. Multiple roles will be displayed



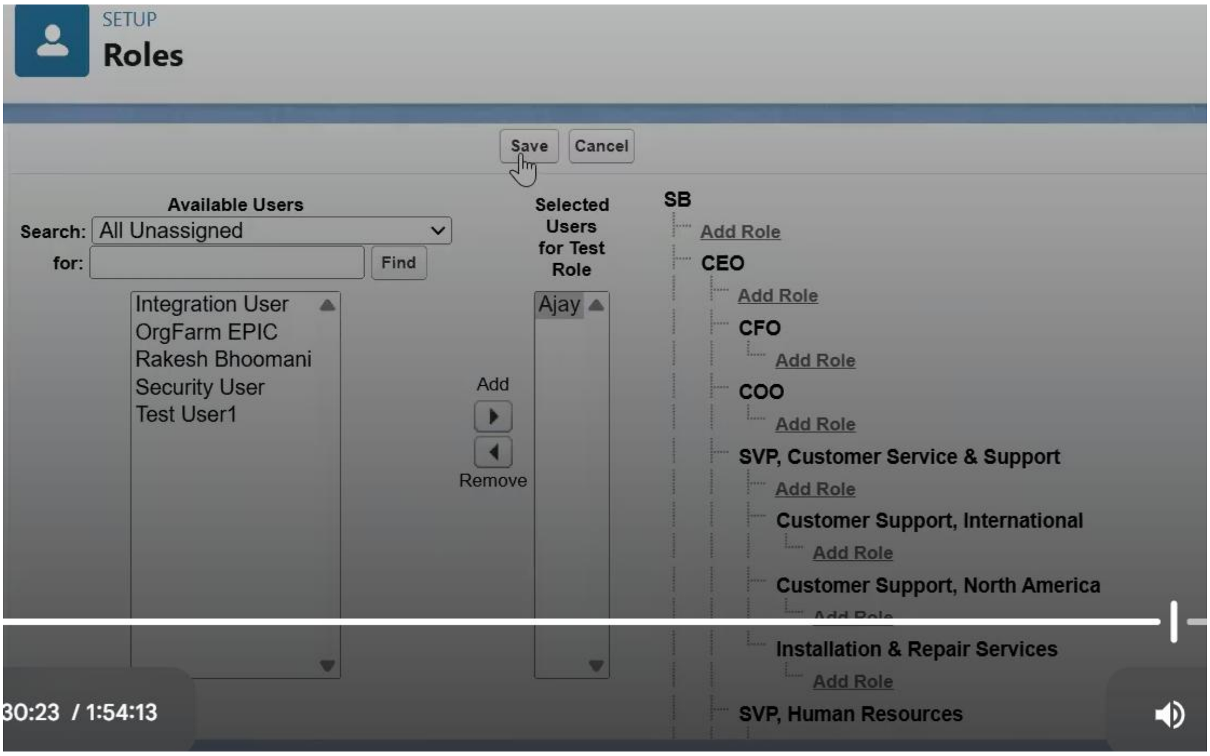
1. Click on COO
2. Add role



Save



Click on assign users to role



- Search : All unassigned
- Selected users for test role: Aliya
- Save

Q. Can I assign 2 roles for a single user ?

Ans:

Yes

A single user can handle multiple positions

Q. How to create profile ?

Ans:

From existing profile only we need to create new profile

Why to create one more profile when we have standard profile ?

We don't have the previlage to change the settings of the standard profile so in those situations we create another custom profile and this custom profile can be configured.

IMPORTANT QUESTIONS

1. **Difference between Role and Profile ?**
2. **What is importand and what is not important while creating a role?**
3. **How many profiles can be there for a user ?**
4. **How many roles can be there for a user ?**

Queues

Queues are similar to groups we create

Queues in the salesforce where records does not have any owner

We can create multiple queues based on the requirements

Example :

Customer agent 1	Customer agent 2	Customer agent 3
1	2	3

Issues resolved by the agents which are ordered in queue

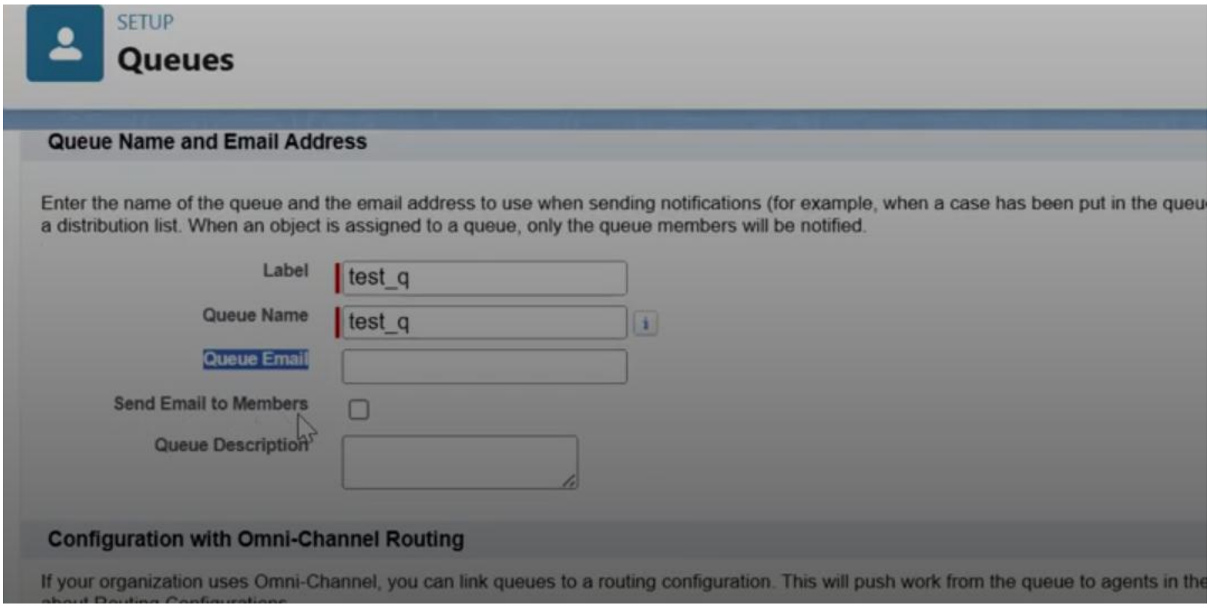
How to create queue ? and how to assign ?

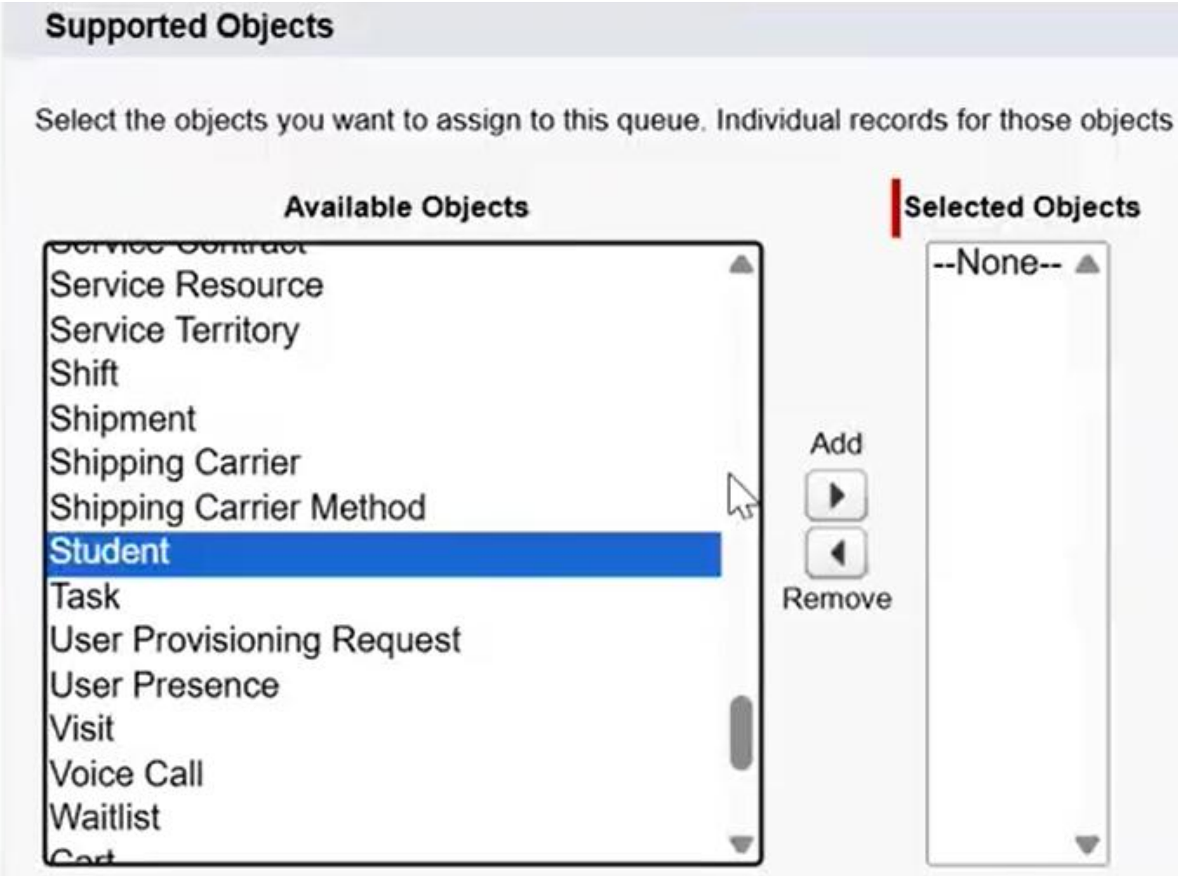
Ans:

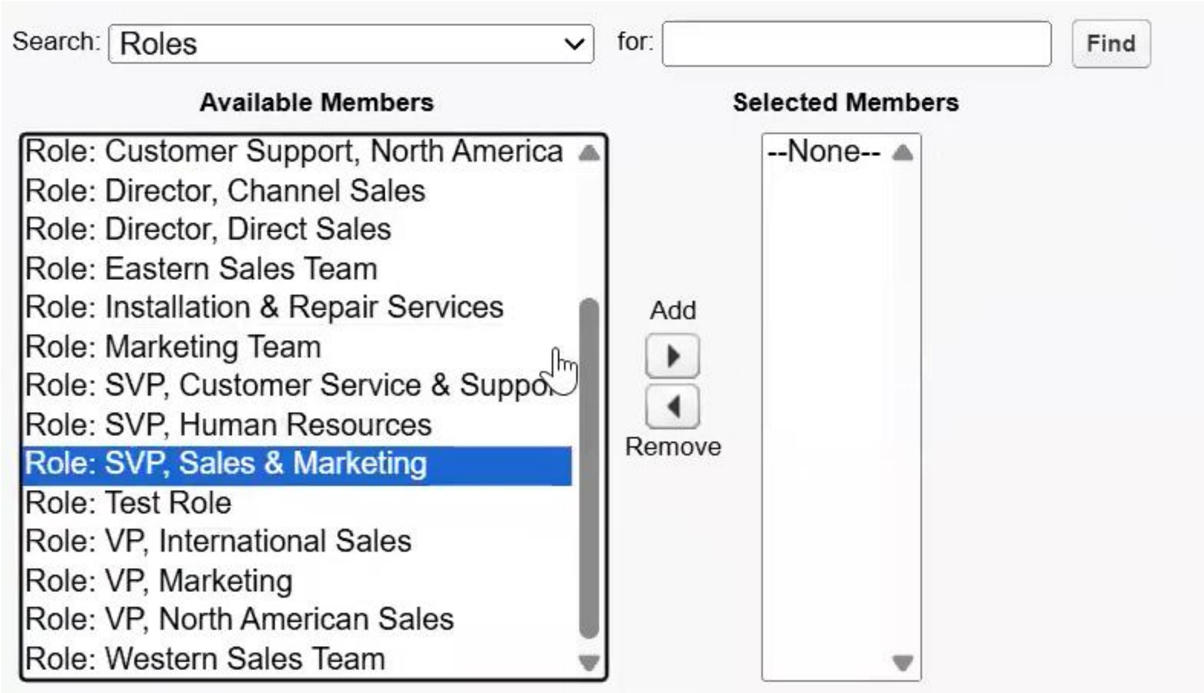
Setup

Queues [used mainly in services and sales clouds, very effective tool]

Label : test_queue


SETUP
Queues
Queue Name and Email Address
Enter the name of the queue and the email address to use when sending notifications (for example, when a case has been put in the queu
a distribution list. When an object is assigned to a queue, only the queue members will be notified.
Label
test_q
Queue Name
test_q
Queue Email
Send Email to Members
Queue Description
Configuration with Omni-Channel Routing
If your organization uses Omni-Channel, you can link queues to a routing configuration. This will push work from the queue to agents in the


Supported Objects
Select the objects you want to assign to this queue. Individual records for those objects
Available Objects
Selected Objects
Service Resource
Service Territory
Shift
Shipment
Shipping Carrier
Shipping Carrier Method
Student
Task
User Provisioning Request
User Presence
Visit
Voice Call
Waitlist
Add
Remove
--None--



Save

SLACK– Demonstration

Steps:

Tcs-lastmile-salesforce

Just type the errors, doubts and everything on the chat box