

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 mandatory.

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 deletion is TRUE

5. What is cascade deletion ?

ans :

cascade deletion is true in MDR

Not true in Lookup relationship

when a parent detail is deleted, automatically child records also get 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 field type - go to -> **MDR**
5. next - save
6. ERROR - Displaying [ cannot create a MDR ] Why ?

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

There are 2 ways to achieve this !!

1. choose the parent value for all the existing child records
2. a. take the backup of the data and fill 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 is 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 ?

05.08.25

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## SKILL WALLET -> DEMONSTRATION

1. skill wallet
2. access resource

### Salesforce

1. Instructions	2. Learning Journey	3. Course Details	4. Lab Details	5. Capstone Project	6. A
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Enroll in the course to begin your learning journey.

Please update your Trailblazer link while enrolling in the course.

**Last Mile - Salesforce Administrator**

🕒 26:30:00 Hr 0%

Category  
Salesforce

Difficulty  
Advanced

**Enroll Now**

**Last Mile - Salesforce Developer**

🕒 20:35:00 Hr 0%

Category  
Salesforce

Difficulty  
Advanced

**Enroll Now**

**Last Mile - Agentforce Developer**

🕒 03:00:00 Hr 0%

Category  
Salesforce

Difficulty  
Advanced

**Enroll Now**

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

Today's 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 deployment.

- 1. Developing**
- 2. Testing**
- 3. Deployment**

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 salesforce -> DEMONSTRATION -> HANDS ON

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

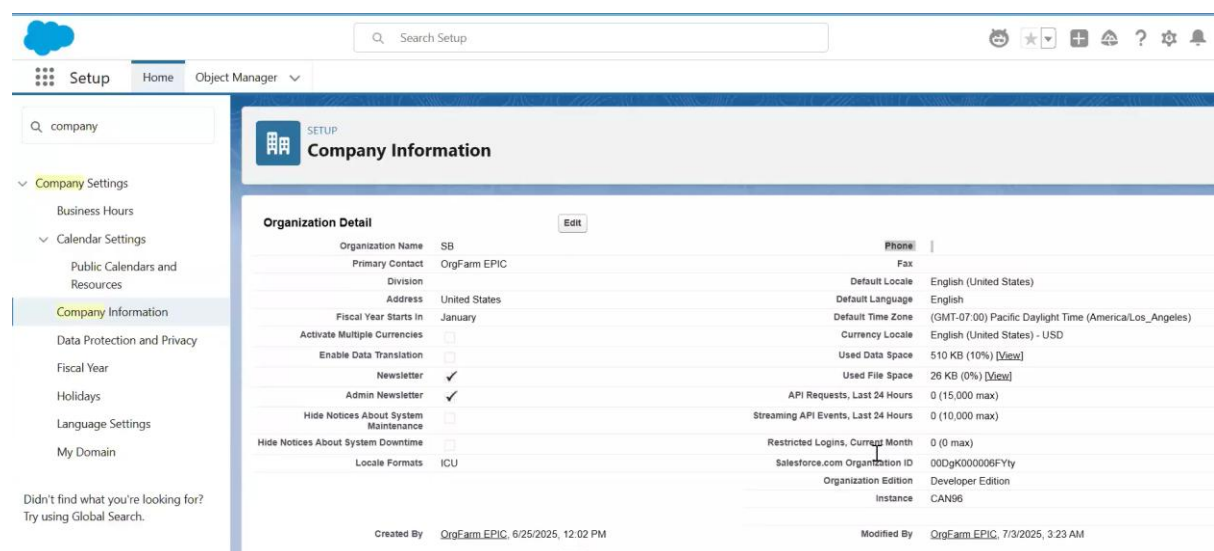
**If we want to create 10 sales representatives = require 10 license**

**Ex: 12 sales executive = 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



The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'company' and a list of settings categories: Company Settings, Calendar Settings, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and displays 'Organization Detail' with an 'Edit' button. The details are organized into two columns. The first column includes Organization Name (SB), Primary Contact (OrgFarm EPIC), Division, Address (United States), Fiscal Year Starts In (January), Activate Multiple Currencies, Enable Data Translation, Newsletter (checked), Admin Newsletter (checked), Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats (ICU). The second column includes Phone, Fax, Default Locale (English (United States)), Default Language (English), Default Time Zone (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles), Currency Locale (English (United States) - USD), Used Data Space (510 KB (10%) [View]), Used File Space (26 KB (0%) [View]), API Requests, Last 24 Hours (0 (15,000 max)), Streaming API Events, Last 24 Hours (0 (10,000 max)), Restricted Logins, Current Month (0 (0 max)), Salesforce.com Organization ID (00DgK000006FYty), Organization Edition (Developer Edition), and Instance (CAN96). At the bottom, it shows 'Created By: OrgFarm EPIC, 6/25/2025, 12:02 PM' and 'Modified By: OrgFarm EPIC, 7/3/2025, 3:23 AM'.

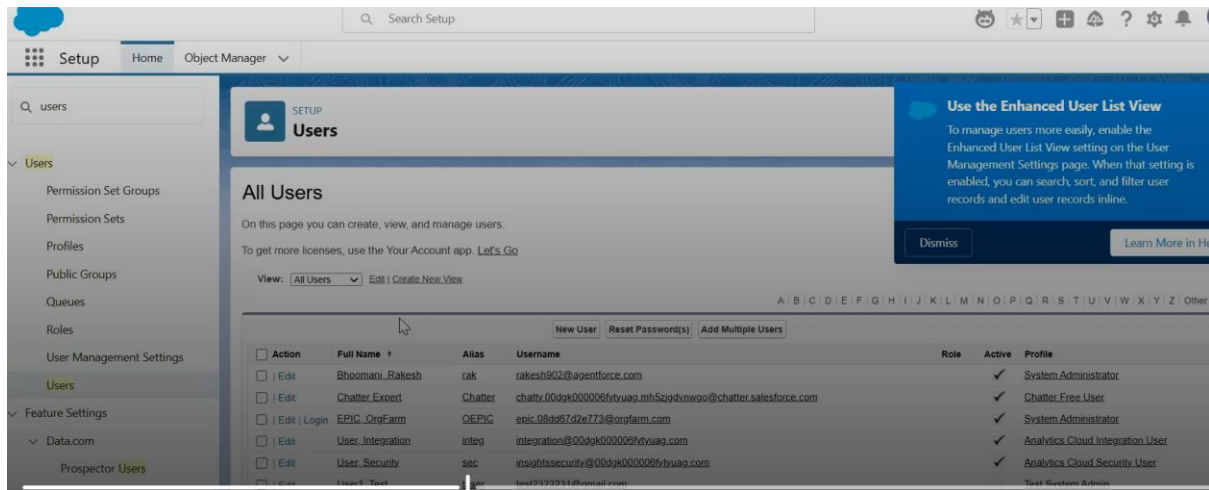
**Instance – CAN96**

**USER LICENSE – 4**

User Licenses					
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

The screenshot shows the 'New User' form in the Salesforce Setup interface. The form is titled 'New User' and includes a 'User Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The form is divided into two main sections: 'General Information' and 'User License'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'User License' section includes fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, and Site.com Contributor User. The form is currently empty, with the 'Role' field set to '<None Specified>' and the 'User License' field set to 'Salesforce'.

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

General Information

First Name

Last Name

aliya

Alias

aliy

Email

aliya03@gmail.com

Username

aliya1234@test.com

Nickname

er17554253334945429783

Title

Developer

Company

Smartbridge

Department

sales

Division

Role

<None Specified>

User License

Salesforce

Profile

System Administrator

Active

☒

Marketing User

☐

Offline User

☐

Knowledge User

☐

Flow User

☐

Service Cloud User

☐

Site.com Contributor User

☐

Site.com Publisher User

☐

WDC User

☐

Data.com User Type

--None--

Data.com Monthly

Default Limit (300)

☒ Generate new password and notify user immediately

Save

Save & New

Cancel

Disable the above permission

Save

User is ready

SETUP

Users

User

aliya

[User Profile](#)
[Help for this Page](#)

[Permission Set Assignments \[0\]](#) | 
 [Permission Set Assignments: Activation Required \[0\]](#) | 
 [Permission Set Group Assignments \[0\]](#) | 
 [Permission Set License Assignments \[0\]](#) | 
 [Personal Groups \[0\]](#) | 
 [Public Group Membership \[0\]](#) | 
 [Queue Membership \[0\]](#) | 
 [Team \[0\]](#) | 
 [Managers in the Role Hierarchy \[0\]](#) | 
 [OAuth Apps \[0\]](#) | 
 [Third-Party Account Links \[0\]](#) | 
 [Built-in Authenticators \[0\]](#) | 
 [Installed Mobile Apps \[0\]](#) | 
 [Authentication Settings for External Systems \[0\]](#) | 
 [Login History \[0+\]](#) | 
 [User Provisioning Accounts \[0\]](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	aliya	Role	
Alias	aliy	User License	Salesforce
Email	aliya03@gmail.com <a href="#">[Verify]</a>	Profile	System Administrator
Username	aliya1234@test.com	Active	<input checked="" type="checkbox"/>
Nickname	User17554253334945429783	Marketing User	<input type="checkbox"/>
Title	Developer	Offline User	<input type="checkbox"/>
Company	Smartbridge	Knowledge User	<input type="checkbox"/>
Department	sales	Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>

Click on users [ on the left side ]

How to get a login button next to the user

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   <a href="#">Edit</a>   <a href="#">Login</a>	Ajay	ajay	ajay23456@test.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   <a href="#">Edit</a>	Bhoomani, Rakesh	rak	rakesh902@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00dggk000006ftyuag.mh5zjgdnwgo@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   <a href="#">Edit</a>   <a href="#">Login</a>	EPIC_OrgFarm	OEPIE	epic.08dd67d2e773@orgfarm.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   <a href="#">Edit</a>	User_Integration	integ	integration@00dggk000006ftyuag.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   <a href="#">Edit</a>	User_Security	sec	insightssecurity@00dggk000006ftyuag.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>   <a href="#">Edit</a>	User1_Test	tuser	test2323231@gmail.com		<input type="checkbox"/>	Test System Admin

New User

Reset Password(s)

Add Multiple Users

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

SETUP

Login Access Policies

Login Access Policies

Control which support organizations your users can grant login access to.

Manage Support Options

Save

Cancel

Setting	Enabled
Administrators Can Log in as Any User	<input type="checkbox"/>

Enable the box -> save

# All Users

On this page you can create, view, and manage users.


To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K

				<a href="#">New User</a>	<a href="#">Reset Password(s)</a>	<a href="#">Add Multiple Users</a>
<input type="checkbox"/> Action	Full Name ↑	Alias	Username			
<input type="checkbox"/>   <a href="#">Edit</a>   <a href="#">Login</a>	aliya	aliy	aliya1234@test.com			
<input type="checkbox"/>   <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00dggk000008269buaa.gon9shogwg7r@chatter.salesforce.com			

Click on login



Logged in as aliya (aliya1234@test.com) [Log out as aliya](#)

TCS\_LM\_SF

[Home](#) [Accounts](#) [Contacts](#) [Students](#) [Mentors](#)

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

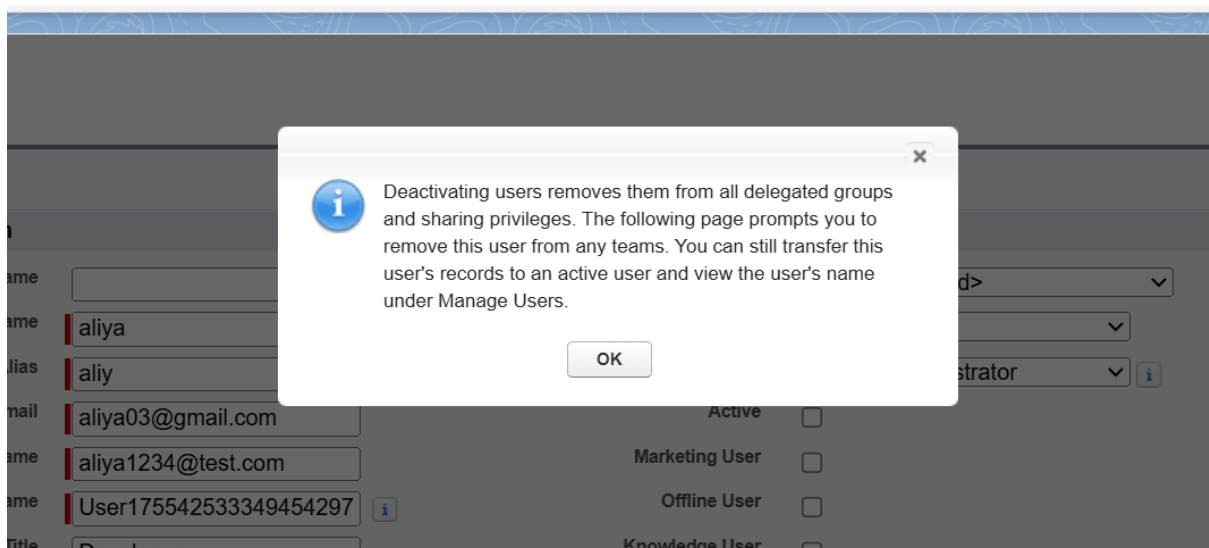
We have a option called deactivating the user

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

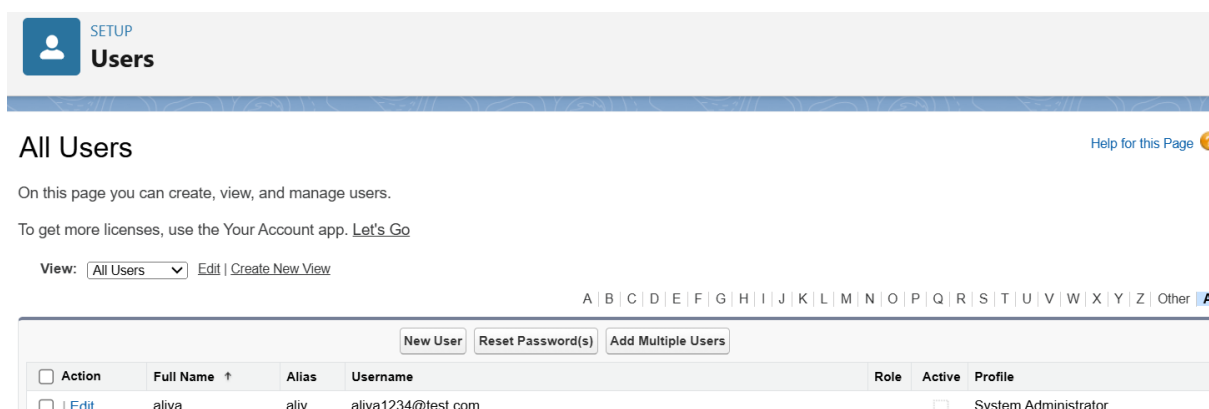
Q. How to deactivate a user ?

Ans:

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

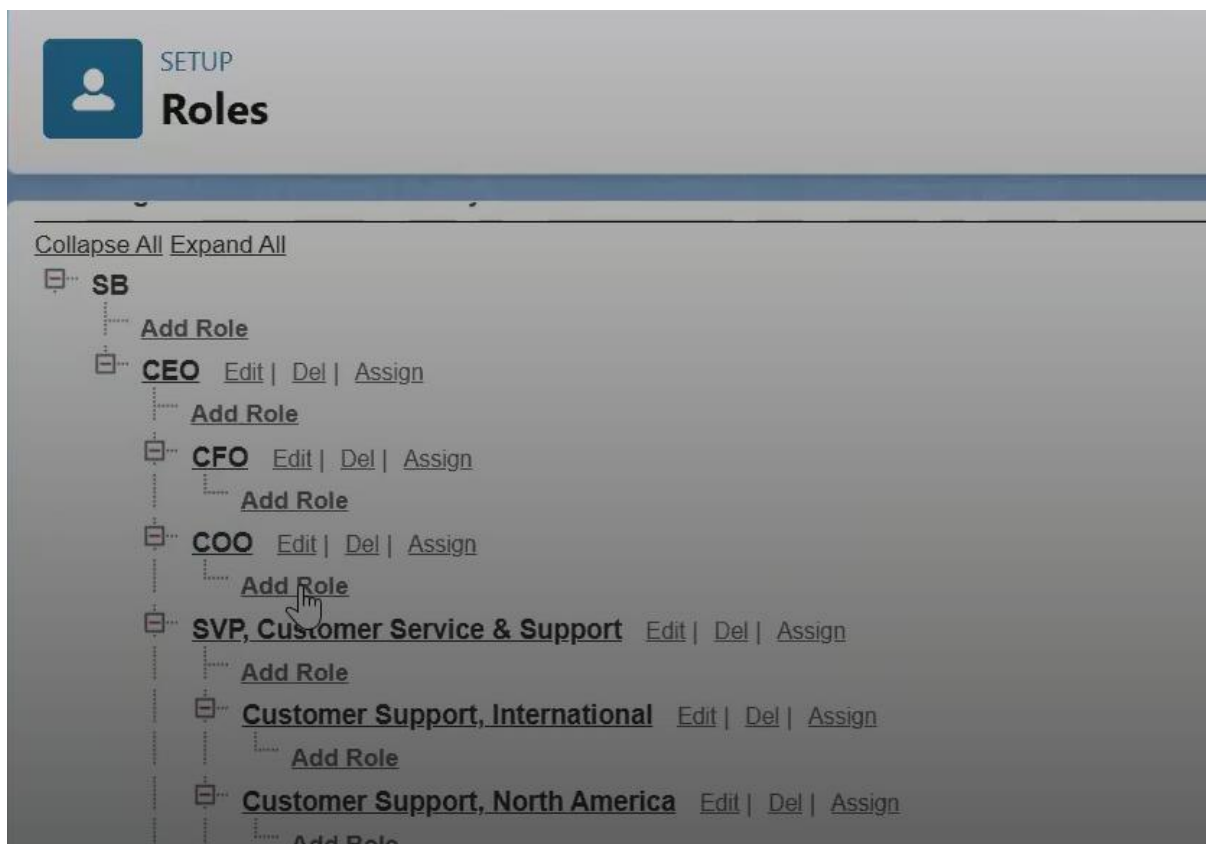
**Assignment :**

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

## Role Edit


# New Role

### Role Edit

Label	<input type="text" value="Test Role"/>
Role Name	<input type="text" value="Test_Role"/> 
This role reports to	<input type="text" value="SB"/> 
Role Name as displayed on reports	<input type="text" value="Test Role"/>

SaveSave & NewCancel

Save

 **SETUP**  
**Roles**

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.


Hierarchy: SB » Test Role  
Siblings: [CEO](#)

[Users in Test Role Role \[0\]](#)

**Role Detail**

EditDelete

Label	Test Role	Role Name	Test_Role
This role reports to	None	Role Name as displayed on reports	Test Role
Modified By	Rakesh Bhoomani, 8/5/2025, 7:01 AM		
Opportunity Access	Users in this role can <b>edit</b> all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can <b>edit</b> all cases associated with accounts that they own, regardless of who owns the cases		

 **Users in Test Role Role**

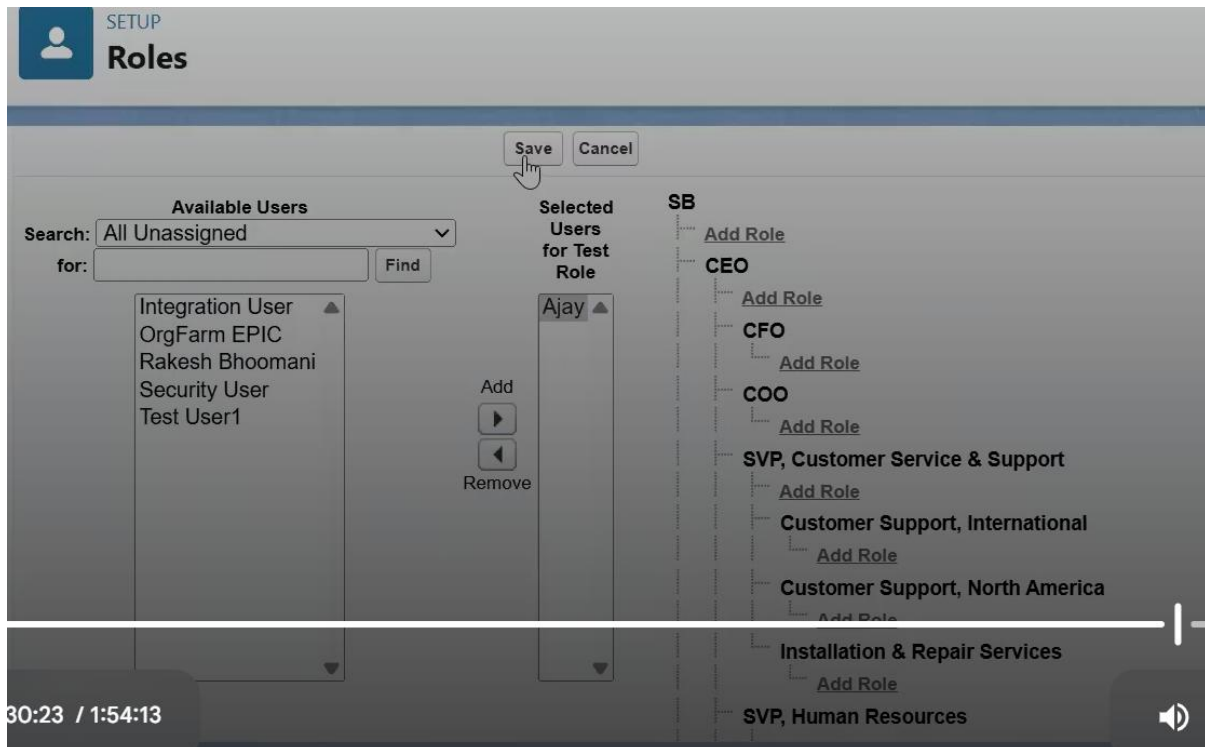
Assign Users to RoleNew User

Users in Test Role Role Help ?

No records to display

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 privilege 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 important 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 queue or a distribution list. When an object is assigned to a queue, only the queue members will be notified.

Label Queue Name 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 queue.

## Supported Objects

Select the objects you want to assign to this queue. Individual records for those objects

### Available Objects

- Service Contract
- Service Resource
- Service Territory
- Shift
- Shipment
- Shipping Carrier
- Shipping Carrier Method
- Student**
- Task
- User Provisioning Request
- User Presence
- Visit
- Voice Call
- Waitlist
- Cart

### Selected Objects

- None--

Add



Remove



Search:  for:

Available Members		Selected Members
Role: Customer Support, North America	<div>Add ▶</div> <div>Remove ◀</div>	--None--
Role: Director, Channel Sales		
Role: Director, Direct Sales		
Role: Eastern Sales Team		
Role: Installation & Repair Services		
Role: Marketing Team		
Role: SVP, Customer Service & Support		
Role: SVP, Human Resources		
Role: SVP, Sales & Marketing		
Role: Test Role		
Role: VP, International Sales		
Role: VP, Marketing		
Role: VP, North American Sales		
Role: Western Sales Team		

Save

## SLACK– Demonstration

Steps:

Tcs-lastmile-salesforce

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



