

Salesforce Interview preparation - Admin

1. What is Cloud Computing ?

- Cloud Computing is nothing but internet computing.
- Storing and accessing the data over the internet.

2. What are the Service models in Cloud Computing ?

- Infrastructure as a service(IAAS) eg: servers, storage,
- Platform as a service(PAAS) eg: Execution runtime, database, web server, development tools.
- Software as a service(SAAS) eg: CRM, Email, games, App
- Network as a service(NAAS)

3. What is CRM ?

- Customer Relationship Management (CRM) is a model for Managing a Company's interactions with current and future customers.
- its manage organization interactions like phone calls, Emails, Meetings and Social media with customers and Sales, Marketing and Support.

4. What are some CRM providers ?

- a) Salesforce CRM.
- b) Microsoft Dynamics CRM.
- c) Oracle CRM.
- d) SAP CRM.
- e) Sage CRM.
- f) NetSuite CRM.
- g) Oracle CRM on Demand.
- h) SugarCRM.

SFDC-INDIA

Online Training & Support

5. What is Salesforce ?

- ✓ SFDC was officially launched in 1999. Founded by Mark Benioff.
- ✓ Salesforce.com is number one on demand CRM in the market.
- ✓ It is cloud computing technology. It is available on cloud, no need any software and no hardware required.
- ✓ You can develop your own application or if you need any application on demand, you can buy from app exchange.
- ✓ App Exchange is a market place to sell our custom applications and to buy applications from app exchange.
- ✓ Force.com platform reduce development cost. we can deliver application is very short time.
- ✓ Salesforce by following the Cloud Computing approach, providing SAAS and PAAS

6. Different type of salesforce URL'S ?

- 🚩 Creating Developer Account : <https://developer.salesforce.com>
- 🚩 Production : <https://login.salesforce.com>
- 🚩 Sandbox : <https://test.salesforce.com>

7. What is Production ?

We should not make coding changes in production since end-users are using the application from production environment.

8. What is Sandbox ?

- To make any changes for the exiting application we should copy all contents of the production into sandbox and make all changes after that test thoroughly and move those changes into production.

- To create the sandbox, in production we can find one link called sandboxes. by clicking on that link we can create the sandbox by choosing type of the sandbox.

Navigation to create Salesforce new Sandbox



Note :

- To view list of Sandboxes in Salesforce.com, navigate to : Setup --> Sandboxes.
- When we login to Salesforce Sandbox we will find Sandbox name as top of the right side.
- Sandboxes that no one has logged in to for 180 days are deleted.

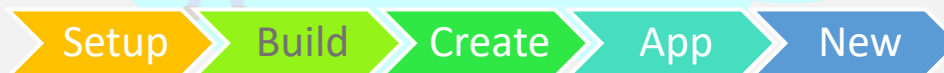
9. Types of Sandboxes ?

- Developer Sandbox.
- Developer pro sandbox.
- Partial data sandbox.
- Full copy sandbox.

Sandbox Type	Refresh Interval	Storage Limit	What's Copies	Sandbox Template
Developer Sandbox	1 day	Data Storage : 200 MB	Metadata only	Not Available
Developer Pro Sandbox	1 day	Data Storage : 1 GB	Metadata only	Not Available
Partial Copy Sandbox	5 day	Data Storage : 5 GB	Metadata and Sample data	Required
Full Sandbox	29 day	Same as Production Org.	Metadata and all data	Available

10. What is App in Sales force ?

- An app is a group of tabs that work as a unit to provide functionality.



tabs.

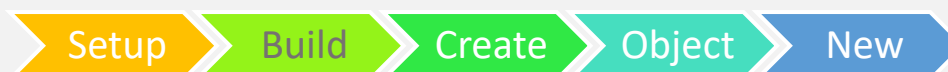
Navigation:

- You can work with existing apps, or build new apps by grouping standard and custom

11. What is object in Sales force?

- Custom objects are database tables that allow you to store data specific to you organization
- Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data.

Navigation:



12. What is Profile?

Profile contains set of permissions and access settings that controls what user can do with in the organization.

13. What is User?

The people who have authenticated username and password to login to the salesforce successfully.

14. What is Roles?

A role controls the level of visibility that users have to an organization's data.

15. What are permission sets?

A set of permissions is given to the users without changing the profile.

16. What is OWD?

- ❖ OWD'S are base line record level security for objects in the organization.
- ❖ It is used to restrict access to data.

17. What is Sharing Rules?

These are used to override the OWD permissions.

Sharing rules are two types

- a) Based on record owner
- b) Based on criteria.

18. What is the role hierarchy?

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

19. Can you tell the difference between Profile and Roles?

- ❖ Profiles are used for Object level access settings.
- ❖ Roles are used for Record level access settings.

20. What is Salesforce1?

Salesforce1 is one of the product provides by Salesforce.com. This Salesforce1 is a mobile application for Android and iOS devices.

20. What is Force.com?

In Force.com, developers can develop applications using APEX and Visualforce languages.

21. What is Work.com?

Work.com is the Social Performance Management platform which is mainly used by Managers and Employees to improve their work performance.

22. What is Data.com?

Data.com is an online business directory. Here every company and business professionals exchange their business information through the business card.

23. What is Desk.com?

Salesforce Desk.com is an online helpdesk system. Through Desk.com, Salesforce.com interact with customers and solve their issues.

24. What is Do.com?

It is a cloud-based task management system for different business and small groups.

25. What is Site.com?

Site.com is also an App builder portal.

26. What is Salesforce Ideas?

Salesforce Ideas is based on Dell IdeaStorm. It is a Suggestion management system where users can share their ideas.

27. What is AppExchange?

AppExchange is an online application marketplace like App Store and Google Play. In AppExchange nearly 3000 applications available.

28. How many relationships included in SFDC & What are they?

We are having five types of relationships they are

- ❖ Lookup Relationship
- ❖ Master-Detail
- ❖ Hierarchy
- ❖ External
- ❖ Many-to-Many Relationship

29. Diff b/w Lookup and Master-Detail Relationship?

Lookup Relationship	Master-Detail Relationship
It is a one to many relationship	It is a one to many relationship
It create for one object up to 40 relationship	It create for one object up to 2 relationships
Lookup is not required field	Master is required field
Parent deleted child will not be deleted	Parent deleted child will be deleted
Can not support rollup summery fields	We can create rollup summery in parent object
Every object will have a field and a record	Every object will have a field and a record
Lookup relationship create in standard object and custom object	Master Detail relationship create in custom object
Already existing data in object we can create Lookup	Already existing data in object we can't create Master-Detail Relationship

30. What is "Hierarchy Relationship"?

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

31. What is "External Relationship"?

- ❖ An external lookup relationship links a child standard, custom, or external object to a parent external object.
- ❖ When you create an external lookup relationship field, the standard External ID field on the parent external object is matched against the values of the child's external lookup relationship field.
- ❖ External object field values come from an external data source.

32. How can I create Many-to-Many relationships?

- ❖ Lookup and Master detail relationships are one to many relationships.
- ❖ We can create many-to-Many relationships by using junction object.
- ❖ Junction object is a custom object with two master detail relationships.

33. What is a "Self-Relationship"?

- 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 Account to Account (same object) object. That is called "Self-Relationship".

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

Using Profiles and Permission Sets.

35. What is TAB in Sales force?

Tab is a user interface component to user creates to display custom object data.

There are four types of tabs:

- ✚ Custom Tabs
- ✚ Web Tabs
- ✚ Visual force Tabs
- ✚ Lightning base Tab

36. How to rename the tab?

Tab name will be decided based on the Plural Label of the custom object, to rename the tab go to corresponding object detail page and rename the plural label.

37. Different Salesforce.com Login methods.

There are different settings and salesforce.com login methods available for users. Some of the ways that user can login salesforce.com are

- i. Web Browser through <https://login.salesforce.com/> URL.
- ii. External API (Application Programming Interface) like Data loader.
- iii. Single Sign On (SSO).
- iv. OAuth.

38. What are standard profiles?

- Read Only
- Standard User
- Marketing User
- Contract Manager
- System Administrator

39. Diff b/w Profile and Role?

Profile	Role
Profile is a collection of settings and permissions	role is a record level security
Profile controlles object level, field level, record type, page layout, login history	Role Controlles record level
Profile is mandatory to the user	Role is not mandatory

40. Is it possible to delete the user in salesforce?

No, once we create an user in salesforce we cannot delete the user record. We can only deactivate the user record.

41. How to give permissions to two fields for different users who belongs to different profiles?

Permission set

42.What is Grant Access Using Hierarchies?

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

43. How we can change the Grant access using role hierarchy for standard objects?

Not possible.

44. What is the difference between ISBLANK() AND ISNULL()?

- ISNULL () works only for number data type fields, if we don't populate with value for number fields it will return true
- ISNULL () won't be supported for TEXT data type fields because text fields never become null
- ISBLANK () supports both number as well as text data types

45. What is the difference between 15 digit and 18-digit record ids in Salesforce?

- ❖ In Salesforce, whenever a user creates a record it will generate a unique record id.
- ❖ After creating the record, in the URL user can see the id of the record which is of 15 digits length
- ❖ In user interface user always see 15 digit id which is Case-Sensitive
- ❖ If the user query the existing records from the database through API (Either from Query Tool or from a program), it will always return 18 digit id which is Case-Insensitive
- ❖ Last 3 digits of the 18 digits represent checksum of the capitalization of 15-digit id
- ❖ Based on the first 3 digits of the record id user can identify the type of the object.
- ❖ All the records which belong to same object will contain same first 3 digits for the record id.

46. What is Record Type?

- For an object based on the Record Type, we can show different fields and different picklist values by assigning different page layouts for the record types and profiles.
- After creating the record type, in the record type user can see all the picklist data type fields, user can edit the picklist and decide which values should display for this particular record type

47. What is the difference between detail page and edit page?

- Whenever user try to create a new record or edit an existing record user can input the values for the fields, this page is nothing but edit page
- After creating a new record or editing an existing record, user can see the information of the record, this page is nothing but detail page

48. What is out of box functionality?

Standard features provided by Salesforce (no need to go for development).

49. What is validation rule?

While creating or modifying the record based on the certain conditions we can display error messages on top of the page or below to the field.

50. What are Governor Limits?

Since we are working in multitenant environment Salesforce is enforcing the limits for all the functionalities.

- ❖ How many no of fields for an object: 800
- ❖ No of master detail relationships for an object: 2
- ❖ No of lookup relationship for an object: 40
- ❖ No of rollup summary fields: 25
- ❖ How many external ids we can enable for an object: 7 (increased from 3 to 7 in Winter-15)

Note: Governor Limits will be changed by Salesforce in further releases. Please refer the Salesforce documentation for the updated limits.

51. For which data types we can enable external id?

- 1) Text
- 2) Number
- 3) Auto number
- 4) Email

52. What is Inline editing?

On the detail page without clicking on edit button we can edit the fields if it is not Read-Only.

53. How to provide security for the Records (Instance)?

- a) Roles
- b) OWD (Organization Wide Defaults)
- c) Sharing Rules ☐ Manual Sharing
- d) Apex Managed Sharing
- e) View All
- f) Modify All
- g) View All Data
- h) Modify All Data

54. What is OWD?

OWD is the default access level on records for any object in Salesforce. For custom objects we can see below access levels

1. Private:

Only owner and above hierarchy users can have Read/Write access and below hierarchy users don't have any access.

2. Public Read only

Only owner and above hierarchy users can have Read/Write access and below hierarchy users can have only Read only access.

3. Public Read/Write

Irrespective of role hierarchy everyone can have Read/Write permissions on the records.

Note: By default, after creating a custom object OWD access level is Public Read/Write.

4. Public Read/Write/Transfer

- This is available only for Case and Lead objects
- If the OWD for an object is set to Public Read/Write/Transfer then, all users can view, edit, transfer and report on all the records but only owner of the record can delete the records

5. Public Full Access

- This is available only for Campaign object.
- If the OWD for Campaigns are set Public Full Access then, all users can view, edit, delete and report on all records.

6. No Access, View Only or Use

- This is available only for Price Book object.
- If the OWD for Price Book is set Use then, all users can access the Price Book information and as well as using the Price Book configuration for Opportunities with Products.
- If the OWD for Price Book is set View Only then, all users can access the Price Book information but not to use that Price Book detail in Opportunities with Products
- If the OWD for Price Book is set No Access then, it restricts users from accessing information for Price Book and Prices.

7. Controlled By Parent

If the OWD for any object is set as Controlled By Parent, then user can perform an action on the record based on whether they can do the same on the parent record associated with it.

55. Can we create a new profile without cloning an existing profile?

No, we have to clone any one of the existing profiles to create a new profile

56. Diff b/w Data Loader and Import wizard?

Data Loader	Import wizard
Dataloader is etl tool, it support export and import the data	Import wizard is internal tool, it importing the data in to salesforce
Data loader supports all standard objects and custom objects	import wizard supports account, contact, lead, solutions and Custom objects
Dataloader support 5 million records	It Support up to 50000 records
Duplicates values allowed	Duplicate values not allowed
Delete operation is available	Delete operation not is available

57. Data loader or Import wizard supports which file format?

.CSV (Comma Separated Values)

58. What is the field mapping file format of the data loader?

.SDL (Salesforce Data Loader)

59. How to insert null values into Data loader?

In Data loader settings we should enable 'insert null values' checkbox otherwise we can't insert null values.

60. Maximum batch size of data loader?

- ❖ Maximum Size is 10000
- ❖ Minimum Size is 1

61. What is the default batch size of Apex Data Loader if we enable bulk API?

2000 records

62. How many ways we can made field is required?

- ❖ While creation of field
- ❖ Validation rules
- ❖ Page Layout level

63. How to call java script using Static Resource in Visual Force page?

- Add java script file in Static Resource



- Name: filename and add file from local desktop and save.
- We can use that file as follows in Visual Force page
- `<apex: includescript values="{! $Resource.fileName}"/>`

64. How many ways we can share a record?

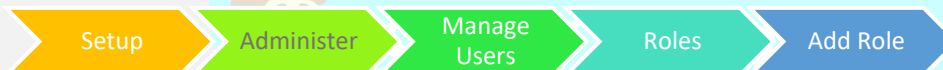
Sharing rules are 4 types:

- Owner Based Sharing Rules
- Criteria Based Sharing Rules
- Manage Sharing Rules
- Apex Based Sharing Rules

Owner Based Sharing Rules: Records which are owned by the users who have the given role or role and subordinate or public group, queue are shared with all the users who belongs to specific role or role and subordinate or public group.

1. Role Hierarchy:

If we add a user to a role, the user is above in the role hierarchy will have read access.



2. OWD:

- Defines the base line setting for the organization.
- Defines the level of access to the user can see the other user's record
- OWD can be Private, Public Read Only, Public Read and Write.
- Setup -> Security Controls -> sharing settings -> Click on 'Edit'

Manual Sharing:

- Manual Sharing is sharing a single record to single user or group of users.
- We can see this button detail page of the record and this is visible only when OWD setting is private

Criteria Based Sharing rules:

- If we want to share records based on condition like share records to group of users
- Whose criteria are country is India.
- Setup -> security controls -> sharing settings -> select the object and provide name and
- Conditions and save

Apex sharing:

- Share object is available for every object (For Account object share object is Account Share).
- If we want to share the records using apex, we have to create a record to the share object.

65. What are Salesforce Reports?

- ❖ A Reports is a set of records displayed in the form of rows and columns.
- ❖ Reports data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in Folder – which controls who has access.

66. What are the different Report Formats?

- 1) Tabular Reports
- 2) Summary Reports
- 3) Matrix Reports

4) Joined Reports

67. What is Tabular Report?

It is the simplest and fastest report formats. It displays the rows as records and fields are listed as columns just like a spreadsheet. It supports sorting of records.

68. What is Summary Report?

This report allows the user to group rows of data, summarize the field value which also supports sorting and display subtotals.

69. What is Matrix Report?

In this report, records are summarized in a grid format. It allows the records to be grouped by both columns and rows.

70. What is Joined Report?

In this type of report, User can create multiple report blocks that provide different views of your data. In this format of report, we organize the data in the form of block. You can add up to 5 blocks in a single report. Each block is defined as a Sub-report (Report Type). It can have its own field, columns, sorting and filtering.

71. What is Conditional Highlighting in Salesforce report?

Conditional Highlighting is a powerful way to show values in report within given limits. Using Conditional Highlighting, We can specify colors for different ranges of values in reports.

72. What is Bucket Field?

Bucketing lets you quickly categorize report records, without having to create a formula or a custom field.

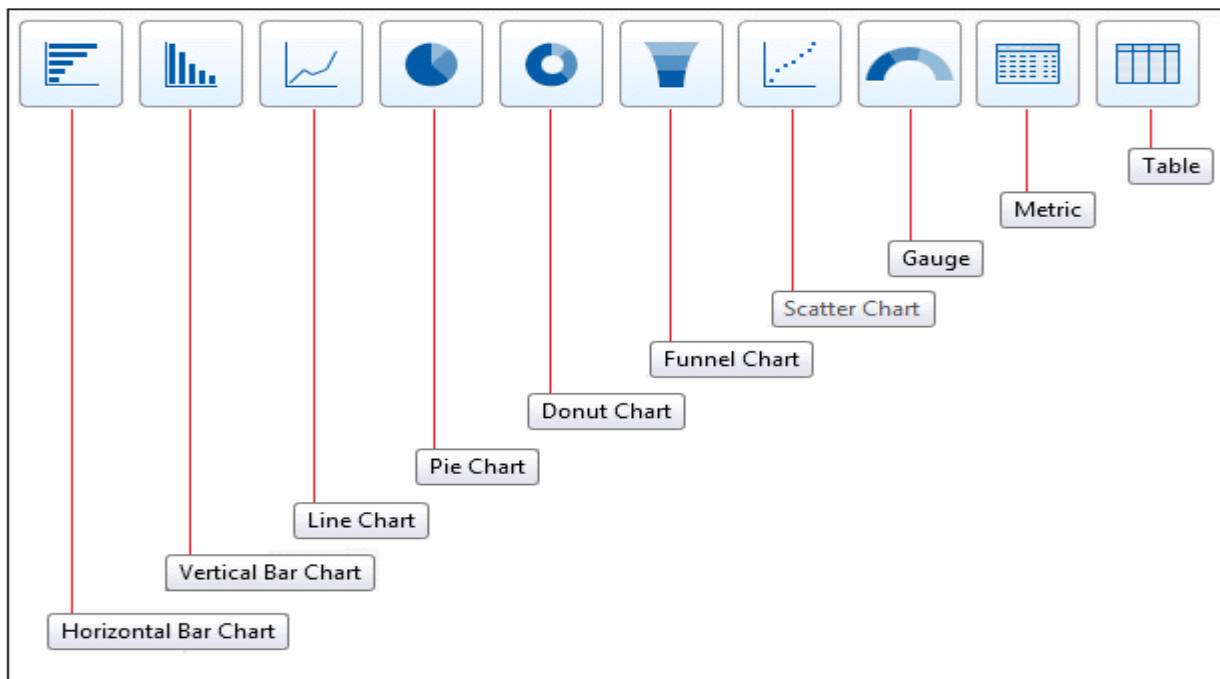
73. Which field type does Bucketing field support?

It supports the field type of

- ❖ Picklist
- ❖ Number
- ❖ Text

74. What are the different Dashboard Component?

- 1) Horizontal Bar Chart
- 2) Vertical Bar Chart
- 3) Line Chart
- 4) Pie Chart
- 5) Donut Chart
- 6) Funnel Chart
- 7) Scatter Chart
- 8) Gauge
- 9) Metric
- 10) Table
- 11) Visual force Pages



75. Explain what is dashboard?

Dashboard is the pictorial representation of the report, and we can add up to 20 reports in a single dashboard.

76. Is it possible to schedule a dynamic dashboard in Salesforce?

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

77. Which type of report can be used for dashboard components?

Summary and matrix report.

78. What is work flow?

Work flow works based on certain criteria, By using workflow we can automate the business process like Email alerts, tasks, filed updates

79. What are the different kinds of evaluation criteria's (events)?

- ❖ created
- ❖ created, and every time it's edited
- ❖ created, and any time it's edited to subsequently meet criteria

80. In which object workflows are stored?

Workflow

81. Work flow and Process builder actions?

Process Builder [8 actions]	Workflow [4 actions]
1 . Created a Record	1 . New Task Create
2 . Submit for Approval	2 . Email sending
3 . Email Alert	3 . Field update
4 . Post to chatter	4 . Send Out bound messages
5 . Field update	
6 . Apex	
7 . Launch a wizard	
8 . Quick Actions	

82. What is immediate workflow action?

The action which will be performed immediately after the record criteria meets.

83. What is time dependent workflow action?

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

84. For which event we can't create time dependent workflow action?

Created and every time edited to meet the criteria.

85. What are the types of email templates?

- ❖ Text
- ❖ HTML (with letter head)
- ❖ Custom HTML (without letter head)
- ❖ Visual Force

86. How can you monitor future actions of time-based workflow?





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Salesforce Interview preparation Part-2