Salesforce Admin (Q&A)

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Interview
Questions & Answers

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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.

Q : What is CRM?

A : It stands for Customer Relationship Management

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.

Q : Editions in Salesforce?

A :

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

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

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

Q : What is Field?

A :

- A fields is like a database column.
- There are various data types are 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.

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 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 click on it.

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.

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.

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.

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

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.

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.

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.

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.

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.

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.

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.

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.

Q : What is Global Picklist ValueSet?

A :

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

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.

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.

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.

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.

Q : Types of Lightning Pages?

A :

- App Page
- Home Page
- Record Page

Q : Component Visibility?

A :

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

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.

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.

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.

Q : What is Activity Component?

A :

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

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.

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.

Q : What is List View?

A :

- List View shows list 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.

Q : What is Record Type?

A :

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

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.

Q : What is Email Template?

A :

- Email Templates contain 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

Q : Global Action Vs Object Specific Action?

A :

- **Global Action :** One can execute action without opening any record on object.
- **Object Specific Action :** Can only be executed through records of an object.

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.

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.

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.

Q : What is Setup Audit Trails?

A :

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

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

Q : What is help text?

A :

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

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.

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.

Q : Operations in Data Loader?

A :

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

Q : What is Sharing and Security in Salesforce?

A :

- Data Security is important because you need to control what a user or group of user can see in the org or app.
- Salesforce provides layered sharing model.
- You can easily assign different data sets to different group of users.
- You can control access to your whole org, any specific object, fields, and records.

Q : Sharing & Security Model

A :

- Organization Level Security
- Object Level Security
- Field Level Security
- Record Level Security

Q : Organization Level Security

A :

- Maintain a list of authorized users
- Set password policies
- Limit login to certain hours and locations
  - Limit IP Addresses from which users can log in
  - Limit the times at which users can log in

Q : Object Level Security

A :

- You can control object level permissions for both Standard and Custom Objects.
- You can set permissions for a particular object.
- You can give permissions to view, create, edit and delete any records of that object.
- You can control object permissions using profiles and permission sets.

Q : Field Level Security

A :

- You can restrict access to certain fields in Salesforce, even if user has object level access.
- You can make a field visible to a particular user and can hide that from another user.
- You can give Read or Edit permission to a field, if you don’t give both then that field will not be visible.
- Field Level Security can be controlled using Profiles and Permission Sets.

Q : What is Profile?

A :

- A profile is a collection of settings and permissions.
- Profile settings determine which data the user can see, and permissions determine what the user can do with that data.
- A profile can be assigned to many users, but a user can have only one profile at a time.

Q : What can be controlled through a Profile?

A :

- Assigned App & Assigned Connected Apps
- Object Settings
- App Permissions
- Apex Class & VF Page Access
- External Data Source Access
- Named Credential Access
- Flow Access
- Custom Permissions & Custom Metadata Type
- Custom Setting Definitions
- System Permissions

Q : Enhanced Profile User Interface?

A :

- You can switch to Enhanced Profile User Interface through Setup > User Management Settings.
- If enabled then you can Browse, search and modify settings and permissions in a profile through a streamlined user interface.

Q : What is Permission Set?

A :

- A permission set is a collection of settings and permissions that give user access to various tools and functions.
- Permission sets extend users functional access without changing their profile.
- Through Permission sets permission can be granted and any time it can be taken away as well.
- Users can have only one profile, but they can have multiple permission sets assigned.

Q : What can be addon through a Permission Set?

A :

- Assigned App & Assigned Connected Apps
- Object Settings
- App Permissions
- Apex Class & VF Page Access
- External Data Source Access
- Named Credential Access
- Flow Access
- Custom Permissions & Custom Metadata Type
- Custom Setting Definitions
- System Permissions

Q : What is Permission Set Group?

A :

- Permission Set group bundles different permission sets together based on a persona.
- A permission set group includes all the permissions available in the permission sets.
- One permission set can be included in more than one permission set groups.
- A user can be assigned one or more Permission Set Groups.
- Also we can assign Permission Set and Permission Set Groups together to users.

Q : What is MUTE in Permission Set Group?

A :

- One can mute some permissions in Permission Set Groups so that they won’t be given to the user.
- If you mute particular permission in Permission Set Group then it won’t impact individual Permission Set, they remain intact.
- You can anytime unmute the permissions in permission set group.

Q : How many Profiles can be assigned to a user?

A :

- One

Q : How many Permission Sets can be assigned to a user?

A :

- **Zero or Any number of Permission Sets**

Q : Record Level Security

A :

- You can restrict access to records for users, even if user has object level permissions.
- For example, a user can view his own records but not others.
- You can manage Record Level Access in following ways:
  - Organization-wide defaults
  - Role hierarchies
  - Sharing rules
  - Manual sharing

Q : What is OWD?

A :

- It specifies the default level of access of records.
- Org-wide sharing setting lock down the data to the most restrictive level.
- Here you have three access level:
  - Private
  - Public Read-Only
  - Public Read/Write
- You can use other Record Level security and sharing tools to open up the sharing of records.

Q : What is Role Hierarchy?

A :

- Role Hierarchy gives access for users higher in the hierarchy.
- That user can access all records owned by the users below them in the hierarchy.
- Each role in the hierarchy should represent a level of data access that a user or group of user needs.
- You can assign users to role through Role Hierarchy or User detail page.

Q : What is Grant Access Using Hierarchies?

A :

- This feature controls whether the user who is above in the role hierarchy can access the records of subordinates or not.
- It is checked by default for all standard object.
- We can control it for custom objects.

Q : What is Sharing Rule?

A :

- Sharing Rules are exceptions to Org-Wide defaults.
- Through sharing rules you can share records to a group of users or to roles, roles & subordinates.
- So that, they can get access to the records they don’t own or can’t manually see.

Q : Two ways to create Sharing Rule?

A :

- Owner Based Sharing
- Criteria Based Sharing

Q : What is Manual Sharing?

A :

- Manual Sharing allows owners of particular records to share them with another users.
- Manual sharing is not automated like Org-wide defaults, Role hierarchy or sharing rules.
- It can be useful in some situation where you manually want to share a record with another user.

Q : What is Public Group?

A :

- A group of users
- You can add or remove users from one public group any time.
- Following can be member of a public group:
  - Public Group
  - Roles
  - Roles and Subordinates
  - Users
- You can also control Grant Access using Hierarchies while creating public group.

Q : Object does not have EDIT permission but OWD is Public Read/Write?

A :

- User won’t be able to edit the record.

Q : View All & Modify All?

A :

- Grant access to all records of the object regardless of the sharing and security settings.
- View all and Modify all permissions ignore the sharing model, roles and sharing rules.

Q : What are Data Analysis Tools available in Salesforce?

A :

- Report
- Dashboard

Q : What is Report?

A :

- Report is a list of records related to objects that meet the criteria defined.
- One can filter, group and do maths on reports.
- One can display reports graphically through charts.
- Every report is stored in a folder.
- Report folders determines how one can access reports to View, Edit, or Manage.
- Report folders can be public, hidden, or shared.

Q : What is Report Type?

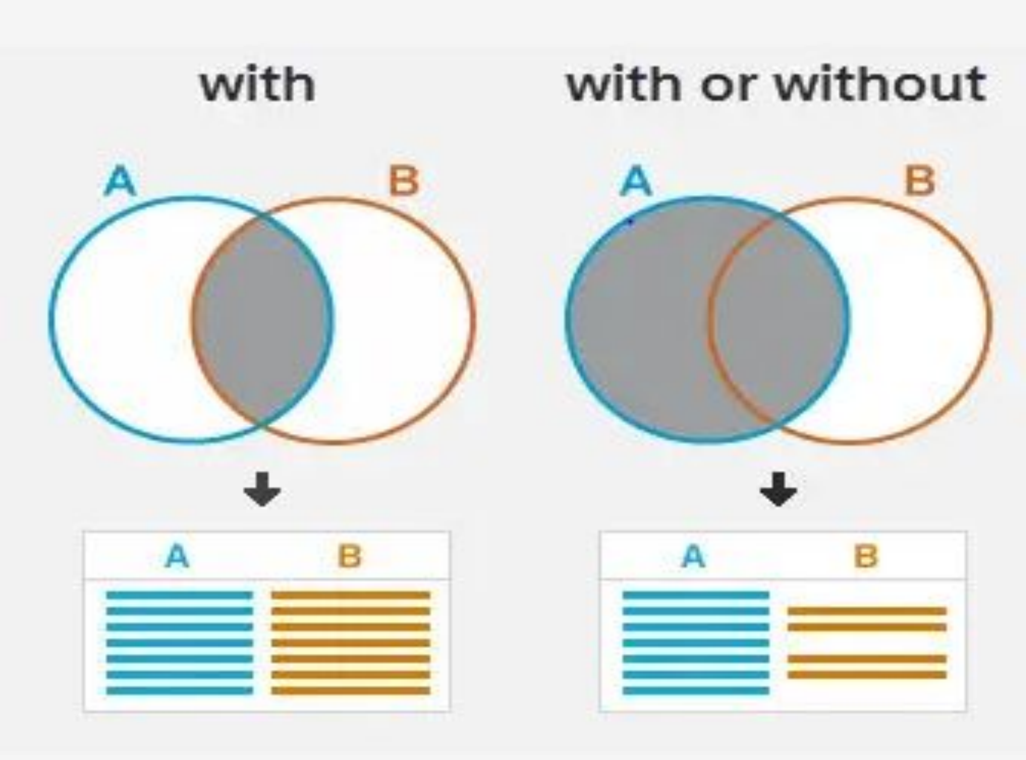
A :

- A report type is like a template for reports.
- Report type determines which fields and records are available for use, when one is creating a report.
- This is based on relationships between a primary object and its related objects.
- For example, with Accounts with Contact report type, Account is primary object and Contact as related object.
- Reports display those record that meet the criteria defined in report types.

Q : What is Report Type?

A :

- Primary object with related object.
- Primary object with or without related object.



Q : Types of Reports?

A :

- Tabular Report
  - Make a List
- Summary Report
  - Group by Rows
- Matrix Report
  - Group by Rows & Columns
- Joined Report
  - Have more than one reports together

Q : What is Tabular Report?

A :

- Tabular report is the simplest report format.
- Rows display records and columns display fields.
- Filters can be applied.
- Sorting can be applied.
- Chart is not supported in this type of reports.

Q : What is Summary Report?

A :

- This report allows the user to group records based on rows.
- We can summarize the report based on particular field.
- This report supports chart.
- Filters and Sorting can be applied.
- It displays subtotal as well for numeric fields.

Q : What is Matrix Report?

A :

- This report summarize the records based on rows and columns.
- It basically creates a grid and show number of records based of grouping of rows and columns.
- This report also support charts.

Q : What is Joined Report?

A :

- In this type, User can create multiple blocks of reports having different types of reports.
- Each block is defined as a sub report and can have different report type.
- Each block has its own fields, filter criteria, charts etc.

Q : Filters in reports?

A :

- Standard Filter
  - Show Me & Created Date
- Field Filter
  - Specific to fields
- Filter Logic
  - Boolean Condition to control Field Filters
- Cross Filter
  - Filter a report by child object using With or Without conditions

Q : Charts can be added in which type of Report?

A :

- Summary Report
- Matrix Report
- Joined Report

Q : Types of Charts available in Report?

A :

- Bar
- Column
- Stacked Bar
- Stacked Column
- Line
- Donut
- Funnel
- Scatter Plot

Q : What is Bucket Field in Report?

A :

- Bucket Field is created in report itself.
- This field is used to group values of particular field available on the object.
- It supports fields of type Picklist, Number & Text.

Q : About Report Folder:

A :

- Report folders determines how one can access reports to View, Edit, or Manage.
- Report folders can be public, hidden, or shared.
- We can control access of contents of the folder based on Roles, Permissions, public groups, territories, and license types.

Q : Can we share a report with User or Group?

A :

- Yes, We can share report folder.
- We cannot share individual report.

Q : Access Levels while sharing Report Folder?

A :

- View
- Edit
- Manage

Q : Can we place a report on Lightning Page?

A :

- Yes, We can place report on below lightning pages:
    - Home Page
    - App Page
    - Record Page
- Report should not be in private folder.

Q : What is Dashboard?

A :

- A dashboard is a visual display of key metrics and trends for records in your org.
- Source of dashboard is Reports.
- You can place one report in multiple dashboards components on a single dashboard.
- Having multiple reports on a single dashboard page makes it a powerful visual display tool.

Q : Can we place a Dashboard on Lightning Page?

A :

- Yes, We can place dashboard on below lightning pages:
  - Home Page
  - App Page
  - Record Page
- Dashboard should not be in private folder.

Q : Can we apply filters in Dashboard?

A :

- Yes, We can apply.

Q : About Dashboard Folder:

A :

- Dashboard folder controls who has access to its content.
- If one has access to folder then only one can access its dashboards.
- However, to view the dashboard components, one need access to underlying reports as well.

Q : Can we share a dashboard with User or Group?

A :

- Yes, We can share dashboard folder.
- We cannot share individual dashboard.

Q : Access Levels while sharing Dashboard Folder?

A :

- View
- Edit
- Manage

Q : Important About Dashboard?

A :

- Eash Dashboard has a running user.
- Running user's security settings determine which data to display in dashboard.
- If the running user is a specific user, then all dashboard viewers sees data based the security setting of that user, regardless of their own security settings.
- **Dynamic Dashboards** are those for which running user is always logged in user. Here, each user views the dashboard as per their own security settings.