**Salesforce Sales Cloud: .**

1. **What is Sales Cloud?**

**. Sales cloud refers to the sales module in salesforce.com CRM. It includes lead, account, contacts, contracts, opportunities, products, price book, quotes, and campaign.**

**. It includes features such as web-to-lead to get online lead from the website (company website), lead response rules, lead assignment rules.**

**. It is designed to be started to end setup for the entire sales process, so companies use this to help generate revenue.**

1. **What is the difference between Sales Cloud and Sales Cloud automation?**

**Sales Cloud includes**

1. **Lead**
2. **Account**
3. **Contacts**
4. **Contracts**
5. **Opportunities**
6. **Products**
7. **Price book**
8. **Quotes**
9. **Campaign**

**Sales Cloud automation**

1. **Web-to-lead**
2. **Lead auto response rule**
3. **Lead auto assignment rule**
4. **Lead process**
5. **Organization wide email address**
6. **What is a lead?**

**Lead is nothing but the information of a prospect customer and he/she is not yet a customer.**

1. **How to convert a lead?**

**When we open the lead page there will be a convert button on it.**

**Click on the convert button to convert the lead.**

1. **What happens when the lead is converted? Or what is the lead conversation process?**

**When a lead is converted the three things will happens**

1. **It will create an opportunity**
2. **It will create an account**
3. **It will also create a contact**

* **Note: if the same account and contract already exist then the system will allow the opportunity to associate with existing contact and account**

1. **What is a lead process in salesforce?**

**A lead process allows you to define or customise status values or stages for leads.**

1. **What is a campaign**

**Campaigns are run by companies to generate leads or business. All the information regarding the campaign planning and execution can be captured in the campaigns.**

1. **How many types of accounts are there in salesforce?**

**There are two types of accounts in salesforce**

**Regular Account (Business Account)**

**Person Account**

* **Note: By default, a person account is not enabled in a salesforce. We should create a support ticket to enable person account**

1. **Can we have both regular and person account in an org?**

**Yes, we can have both the accounts at a time in an org.**

1. **How to differentiate between Regular and person Account?**

**As soon as we enable person account, there is a record type created for account and it will have two options**

1. **Account**
2. **Person Account**
3. **What is the difference between a regular account and a person account?**

**Regular accounts are used for B2B type of account and Person Accounts are used for individual customers which are not business.**

**Person account will not have a company field. When we convert a lead to person account it will not create the contact.**

1. **What is a product?**

**It is a standard object which stores all the products a company sells. Its API name is product2 in salesforce.**

1. **What is a price book?**

**It is used to provide different pricing of the same products for different regions or different types of customers.**

**i.e., for a particular product retail customers can have some price but wholesale or regular customers can have a different price.**

1. **What are quotes?**

**A Quote is the negotiated price given to the customer and it will only be valid for some specific period.**

**Note: By default, Quotes are not enabled in salesforce.**

**To enable Quotes, go to Setup 🡪 Customise 🡪 Quote Settings 🡪 Enable.**

1. **Is the default or out of the box functionality sufficient for complex product quotes?**

**No, Salesforce out of the box Quotes functionality is not sufficient for Quotes.**

1. **How to achieve complex Quotes functionality in salesforce?**

**We can install and use any of the AppExchange CPQ products to achieve complex quote functionality.**

1. **What is CPQ?**

**CPQ stands for configure price and quote.**

1. **What are the AppExchange apps available for CPQ?**

* **Salesforce CPQ (Salesforce in 2016)**
* **APTTUS**
* **Big Machine (Oracle in 2016)**
* **Cloudsense (industry specific CPQ)**
* **Velocity (industry specific CPQ)**

1. **What is web-to-lead in Salesforce?**

**Web-to-lead is an essential salesforce automation feature. This feature helps companies to capture data submitted by their website visitors and create a lead in salesforce.**

**Example: Ravi visits the website of xyz company and open their contact us page , contact us page is expecting Ravi to enter few details like his contact details and the product he is interested in, once these data is entered by Ravi and click submit button, it will be automatically created as lead in salesforce.**

1. **What is the lead auto assignment rule?**

**Lead auto assignment rule automatically assign lead to the appropriate owner based on the assignment rules. Owner of the record can be either a user or queue. Lead auto assignment rules consist of multiple criteria. There can be only active rule at a time for Lead.**

* **Example: Bob submits his details on contact us page of ABC company and selected Product as Hardware then lead auto assignment rule can automatically assign the created lead to Hardware Teams Queue**
* **And If Harry submits his details on the contact us page of ABC company and selected Product as Software then lead auto assignment rule can automatically assign the created lead to Software Teams Queue**

1. **What is the lead auto response rule?**

**Lead auto response rule is to send automated responses based on any attribute of any incoming lead. There can be only one active rule at a time for Lead.**

**Example: When Bob submits his details on the contact us page of ABC Company then he receives an email confirming his details are received by the company.**

**Salesforce Service Cloud: .**

1. **What is Service Cloud?**

**Service cloud refers to the services or customer service module in salesforce.com. It includes cases, solutions and knowledge articles, entitlements, and Assets.**

**It also has features like web2case, case auto assignment rule, case escalation rule etc.**

**It is designed to allow an organisation to support past, current, and future customers who will be requesting you to assist with the products or services etc.**

1. **What is the difference between service cloud and service cloud automation?**

**Service cloud includes**

1. **Case**
2. **Solutions**
3. **Knowledge articles**
4. **Entitlements**

**Service cloud automation**

1. **Business hours**
2. **Holidays**
3. **Web to Case**
4. **Email2case**
5. **Case auto assignment rule**
6. **Case auto response rule**
7. **Case escalation rule**
8. **What is a case?**

**A case is defined as customer’s issue, question, feedback, or problem. Custom support reps in the company uses cases to track and solve the customers issues.**

1. **What is a solution?**

**A solution is a detailed description of customer issues and resolution to it. These are generally frequently occurring issues with the steps to solve the issue.**

**Solution can be hosted on company’s self-service portal and make them public so that customers can refer themselves and solve the issues**

**Or these can be private hosted on company’s internal portal where only companies internal support rep can access.**

**Note: Solution are not available in salesforce lightning, and it will never be available in future in lightning**

1. **What are knowledge articles?**

* **Knowledge articles are very much similar to solutions, but it is having a lot more features than solutions.**
* **For simple company setup we can utilize solutions but if we want more robust solutions we can utilize knowledge articles functionality in salesforce ..**
* **Knowledge articles require an additional feature license.**
* **To enable a knowledge license, we must go to the user and check the checkbox knowledge user.**

1. **What is an entitlement in salesforce?**

* **Entitlements lets the support reps know whether the customer is eligible for the support.**
* **Whenever a customer purchases a product or services entitlements are given to them either free or with a premium fee.**
* **Example: Bob purchased an Apple iPhone and he received free entitlement for product support for 2 years and Bob purchased additional product repair or replacement entitlement for a fee for 2 years.**
* **All this information of Bob’s entitlement is documented in entitlements. Whenever Bob calls for support reps refer to Bob’s entitlements before supporting his care.**

1. **What is an Asset in Salesforce?**

**While products represent a product which company sells, but assets represent a specific product a customer has purchased. Assets have serial numbers, purchase date and other information related to that specific product.**

**Example: Apple sells iPhone, so here iPhone is a product of apple. But when Bob purchases an apple iPhone the that particular piece becomes an Asset which will have its unique serial numbers, its purchase date and many other information**

1. **What is an SLA?**

**SLA is a Service level Agreement, the agreement between the company and the client or customer that service will be available for and agreed upon period of time.**

1. **What are business hours?**

**Business hours are used in salesforce to adhere to the timeline of an SLA while supporting a customer case.**

1. **What are Holidays in salesforce?**

**We can setup Holidays in salesforce which can be used in conjunction with business hours to adhere on agreed upon SLA while supporting a customer case.**

1. **What is web to case?**

**Web-to-Case is very similar to web-to-lead. This feature helps companies to capture the data related to customers problems/issues and create a case in salesforce.**

1. **What is the case auto assignment rule?**

* **Case auto assignment rule automatically assigns case to the appropriate owner based on the assignment rules. Owner of the record can be either a user or a queue. Case auto assignment rule consists of multiple criteria. There can be only one active rule at a time for case.**
* **Example: Bob submits his issue details on the support portal of ABC company and selects the device type as Laptop then case auto assignment rule can automatically assign the created case to Laptop Teams Queue.**
* **And if Harry submits his issue details on the support portal of ABC company and selects the device type as Monitor then case auto assignment rule can automatically assign the created case to Monitor Teams Queue.**

1. **What is the case auto response rule?**

* **Case auto response rule is to send automated responses based on any attribute of any incoming Case. There can be only one active rule at a time for Case.**
* **Example: When Bob submits his issue details on the support portal of ABC Company then he receives an email confirming his issue details are received by the company and a case is created for the same.**

1. **What is the case escalation rule?**

* **In escalation rules, when the case is not worked up for a specific time then it can be automatically escalated to the higher manager.**
* **Which means escalation rules automatically escalate cases when the case meets the criteria for escalating a case, and escalation actions, which defines what happens when a case escalates.**

Salesforce Environments and Deployments

1. **What are deployments in salesforce?**

* **Salesforce deployment is a process or activity that typically takes place at the end of development, it is the act of moving changes form one salesforce environment to another salesforce environment or production environment.**

1. **What is an Org in Salesforce?**

* **An Org is nothing but an identifier that represents a customer’s version of salesforce and its data within a salesforce instance. A Salesforce instance can have multiple customers orgs.**
* **Each org can be highly customized which includes custom objects, custom fields, apps, tabs, workflows, process builders, data sharing rules, visual force pages, apex classes, triggers etc.**
* **To get the instance and Org details, goto 🡪 setup 🡪 company information.**

1. **What are the two broad categories of orgs?**

* **Production Org**
* **Development Orgs or Sandbox**

1. **What are different types of sandboxes in salesforce?**

* **Developer Sandbox**
* **Developer Pro Sandbox**
* **Partial Copy Sandbox**
* **Full Copy sandbox**

1. **Explain the limitation of each sandbox?**

**Table

Description automatically generated**

1. **What is a Salesforce environment?**

* **Salesforce environment is a salesforce org which is used for a specific purpose. Example, development, Testing, and production environments**

Diagram

Description automatically generated

1. **How to login into a sandbox or production orgs?**

* **User test.salesforce.com url to login into any sandbox**
* **Use login.salesforce.com url to login into production**

1. **What is sandbox refresh and how do we refresh sandbox?**

* **Refreshing a sandbox updates its metadata form the source org. Most often the refresh is done from production org.**
* **If the sandbox is a clone or if it uses a sandbox template, the refresh process updates the org’s data and its metadata.**

1. **What are different tools used for salesforce deployments?**

* **Change Set**
* **ANT Migration tool**
* **Salesforce Package (Managed and unmanaged packages)**
* **Salesforce DX**

**Paid**

* **Auto Rabbit**
* **Copado**
* **Click deploy (acquired by Copado)**
* **Gearset**
* **Flosum**

**Any Salesforce IDE**

* **Visual Studio Code**
* **Eclipse Force.com IDE**
* **Welkin Suite -Paid**

1. **What is an outbound changeset?**

* **An outbound changeset is a change set created in the Salesforce org in which you are logged in and that you want to send to another org.**
* **You typically use an outbound change set for customizations created and tested in sandbox and that are then sent to a production org.**

**Environments**

* **Change sets**

**/ Inbound**

**/ Outbound**

1. **What is an inbound changeset?**

* **An in bound change set is a change set that has been sent from another Salesforce org to the org you are logged in to. A change set must be deployed for the changes to take effect.**
* **You can deploy the contents of an inbound change set as a whole but not on component-by-component basis.**

1. **Is it compulsory to do the configuration / development in a sandbox and then deploy to production? Can we do the changes directly in production?**

* **There are some limitations like, apex code and triggers cannot be directly modified in production.**
* **While we can do any configuration changes in production it will have cascading effects. Like if we are modifying a process builder and a user is using some functionality which uses that process builder.**
* **So, It is always recommended to do the configuration or development changes in sandboxes, test and then deploy to production.**