Scenario-Based Salesforce Interview Questions With Sample Answers

While attending an advanced Salesforce interview, the hiring manager might ask hypothetical scenario-based Salesforce interview questions to test your problem-solving skills and working style. Here are some challenging scenario-based interview questions you can expect in a Salesforce interview:

1. I want to delete 30,000 customer records but do not want anyone else to recover them. What can I do?

If you are applying for the role of a Salesforce administrator, you can expect the interviewer to ask such operation-based questions. These questions test your familiarity with the system and help the interviewer determine if you have the skills to solve Salesforce operational challenges for other users. You can explain these questions by specifying the command or procedure that solves the issue and how you use it.

Example: "*Salesforce makes it easy to bulk delete records permanently using the hard delete option. The difference between delete and hard delete options is that the former sends the deleted records to the Salesforce recycle bin, where it remains for 15 days. The hard delete erases all records permanently from the Salesforce system with no way to recover it.*"

Related: [10 Common Interview Questions About Using Salesforce]()

2. How do you pass data from a child to a parent component?

The hiring manager might ask this question to test your knowledge of the Salesforce Lightning platform. Components are crucial in facilitating communication between different objects on the Lightning platform. When you create a component inside another component, it creates a parent-child relationship.

Example: "*The first step is to create a custom component event with the required attributes to facilitate communication between the child and the parent components. Register an event in the child component using the Aura tag and fire an event using a trigger like "button onclick" or "onchange of input text". Every time the trigger occurs in the child component, it calls the custom event and passes the required parameters to the parent component.*"

Related: [21 Salesforce Admin Interview Questions And Sample Answers]()

3. How to convert a 15-digit record ID to an 18-digit record and vice versa?

The interviewer might ask you questions like these that require you to perform specific tasks. These questions help the interviewer test your knowledge of using suitable Salesforce functions to complete these tasks. You can prepare for similar questions by revising essential Salesforce functions before the interview and updating your knowledge on them.

Example: "*We can use the CASESAFEID() in the formula field to increase its value from 15 to 18 digits. To decrease the field size, remove the last three digits. Salesforce automatically truncates the field size from 18 to 15.*"

4. Can you suggest a few security best practices to safeguard our critical data while using Salesforce products?

Security is one of the biggest reasons organisations are hesitant to implement cloud-based solutions like Salesforce. Salesforce administrators ensure the safety of customer data stored and transmitted using Salesforce products. By suggesting different safety procedures and best practices, you can demonstrate to the recruiter that you prioritise data security, creating a favourable impression that might help you secure the role.

Example: "*The first security measure I recommend is enabling multi-factor authentication to add an extra layer of protection against phishing attacks, account takeovers and credential stuffing. I use Salesforce health check regularly to identify and fix vulnerable security settings with each new update. Another security measure I prefer is restricting access only to users from a designated IP address, like the corporate network. This ensures that the system denies access to hackers trying to access the system from other IPs or virtual private networks (VPNs).*"

Related: **Cyber Security Interview Questions And Answers**

5. What is the difference between custom and standard reports?

Interviewers might include a few questions that ask you to explain the differences between two features in a Salesforce product. When answering a question that discusses the difference between two things, you can first describe the definition or highlight of each element and then explain how they vary. This approach demonstrates that you have thorough knowledge about the feature and understand its usage accurately.

Example: "*A report type in Salesforce is a template that makes reporting easier and straightforward. The report type determines the records and fields available for use and defines the relationships between a primary object and its related objects. In Salesforce, the two basic report types are standard and custom.*

A standard report is the default type and Salesforce automatically generates it when you create objects and define the relationships between them. A custom report is a user-created report and the admin can specify all the fields available to users while creating it. It also has the functionality to associate up to four objects. It is like instructing Salesforce that you need specific objects with pre-defined fields whenever you use the report."

Related: **How To Write A Salesforce Developer Resume (With Example)**

6. As a Salesforce administrator, how would you give access to users to knowledge articles?

A Salesforce administrator's primary responsibility is to make it easy for others to use Salesforce products. As an administrator, part of your role is defining user access levels to ensure all users have access to required features. The interviewer might ask similar questions to check if you have the expertise to handle different requests from users with varying access grants.

Example: "*We can assign user knowledge licence by changing the status of the knowledge user checkbox to 'true' on the user detail page. This ensures that the specific user has access to all knowledge articles.*"

7. What error does the system show when you create a new active escalation rule when another active rule is already in place?

The interviewer might try to confuse you by asking tricky questions like these. The question's wording might make you think that the Salesforce CRM shows an error message when you create a new escalation while another escalation already exists. But the actual response is that the CRM does not display an error message in this scenario.

Example: "*No, there are no error messages. Instead, the Salesforce CRM marks the old escalation as inactive and the new escalation becomes the active rule. This is because the CRM permits only one escalation to be active simultaneously.*"

Related: **11 Common CRM Interview Questions And How To Answer Them**

8. Can you explain a few ways to call an Apex class in Salesforce?

Apex is an object-oriented programming language that helps developers execute the transaction and flow control statements on Salesforce servers. If you are applying for the position of a Salesforce developer, you can expect the interviewer to ask you a few Apex questions to check your coding proficiency in the language. While preparing for the interview, read the job description carefully to understand the specific requirements and revise appropriate coding topics.

Example: "*There are several ways to call the Apex class. Some of the popular methods include using triggers, from the developer console, using JavaScript links, from the Visualforce page, from another class or by using the homepage components.*"

Related: **6 Coding Bootcamp Interview Questions With Answers And Tips**

9. What happens if the developer does not declare a class as 'with sharing' or 'without sharing'?

Hypothetical "what happens" questions are common in a scenario-based interview. The interviewer asks these questions to evaluate your critical thinking skills and check if you understand the various possibilities of the situation. To answer this question, you can explain the different options and share suggestions on how the developer could avoid similar problems.

Example: "*When the developer does not declare a class using "with sharing" or "without sharing" attributes, the class does not consider the various sharing rules. But, if another class with the 'with sharing' attribute calls the first class, it considers the corresponding sharing rules. If a "without sharing" class calls another "with sharing" class, the system executes the methods inside the "without sharing" class.*"

10. Assume a manager who oversees a team of 20 users is leaving the organisation. What happens if I inactivate the manager?

This question tests your knowledge of role hierarchy, assignment rules and the approval processes. The interviewer provides such hypothetical situations to evaluate if you would be able to handle such similar situations later in the workplace. You can answer these questions by explaining your solution and why you feel it is the best possible option.

Example: "*The best approach is to deactivate the manager's account and reassign the team to another manager. To prevent users from logging into the account during the reassignment, I suggest that we can freeze the team member's accounts temporarily by using the "freeze" button on the user record. Once the reassignment is over, we can deactivate the freeze button and continue with the new hierarchy.*"

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Q. If user has view access on report folder but in profile he does not have access to dashboard then will user be able to access the dashboard?

A. No, On the profile level user should have **View Dashboards in Public Folders**– "View and access dashboards in public folders, which does not include others' personal folders" apart from view access at report level for him to view the dashboard.

Q. Can we access Lookup / Formula fields in the sharing rule?

At present Lookup fields and formula fields are not allowed in sharing rules. Due to which duplicate text fields need to created and maintained.

It is still an open Idea

Q How to trigger Sharing rule of Formula field?

Sharing rule does not let you use formula fields in the rule criteria, but workaround is to replace the formula field with a regular field and put the formula that populates it into a workflow that fires whenever an object is created or edited.That way you'll have a regular field with the same value.

example- There is a city (formula field) on Student_c object and we need to use that in the criteria that when City = 'Delhi' then share with Sales Support role. Now because we cannot access formula field in the sharing rule so we will create another field on student object, lets say CityValue. Now we will create a workflow that whenever City (formulaField)= 'Delhi' then fieldUpdate CityValue (TextField) to 'Delhi'. Then access the CityValue field in the Sharing rule.

Q. What is apex managed Sharing?

Apex managed sharing provides developers with the ability to support an application's particular sharing requirements programmatically through Apex or the SOAP API. Only users with "Modify All Data" permission can add or change Apex managed sharing on a record. Apex managed sharing is maintained across record owner changes.

Q. What is a share object?

Every object has a share object .Share object is a junction between your object and the user you want to share the record .To access sharing programmatically, you must use the share object associated with the standard or custom object

For example, AccountShare is the sharing object for the Account object

Note: Objects on the detail side of a master-detail relationship do not have an associated sharing object.

Q. Can we create Share object for custom object?

We cannot create "__**share**" object by yourself. System create it for us. If sharing setting of an object is "**Public Read/Write**" system will not create "__**share**" object, as there is no scope of sharing, all record is open to everybody in org. However, if sharing setting of object is either “**Public Read Only**” or “**Private**“, system itself create a “**__share**” object for us.

Q. Case object has OWD set to private. Now regardless of hierarchies, like top to down (e.g. manager can view lead cases), down to top (e.g. lead can view manager cases), and horizontal (e.g. lead can view lead cases), and cross functionally, all cases should be visible to anyone without change in OWD. How is this possible?

Create a criteria based sharing rule where give access to “Roles and subordinates” to the head of department , this will let everyone access case regardless of hierarchy.

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SFDC scenario based interview Questions

1) Consider the scenario

- I have a profile by name ‘ProvideReadAccess’ and two users U1 and U2 assigned to it. And I have object X.
- My Question is I want to have ReadWrite access for U1 and ReadOnly access for U2 for the object X.
- How do I do this?

Answer:

- Read Access for both users is common hence in the Profile settings give ‘Read’ access for the object ‘X’
- By doing this User U2 will be able to read all the records(One condition satisfied) but U1 will also be able to only read the records(Second condition not satisfied).
- So next what do we do is we create a permission set say ‘GrantWriteAccess’ and in this permission set we give the object ‘X’ the Write access and assign the user U1 to this permission set.(2nd condition satisfied).

2) Consider the scenario

- I have not given any CRUD permission in the profile ‘P1’ for an object O1, yet I’m able to create records for object ‘O1’. How could this be possible?

Answer:

- Any permission with respect to creation /deletion/Updating/viewing of object is possible only through permission set or Profile.
- Meaning If we are able to create records in a object then the Create Permission in either Profile or in Permission Set should be enables. If its not enabled in the Profile then it has be in the Permission set.
- So check for the permission set.

3)Consider a scenario

- I have two objects Obj1 and Obj2 which are not related to each other.Now I want to create a Master Detail Relationship(MDR) between these objects **How can I do this?**

Answer:

- First choose which object has to be a Parent object(Master) and Child Object(Detail).
- For our understanding lets say for now we decide Obj1 to be Master object and Obj2 to Detail object.

First lets under stand what's a Master Detail relation ? Every child should have a parent. Which means every record in Obj2 should have a related parent record in Obj1. Also One child can have only one parent. But One parent can have multiple children.

Scenario 1: if there are pre existing records in the Obj2 then?

With the above understanding on Master Detail relation we have to be sure that every record in Obj2 has a related record in Obj1.

And in our scenario Obj1 and Obj2 are not related to each other. So first we have to create a basic **Look up** relation between these two objects so that we can establish a relation between these two objects.

So we follow below steps

1. we create a Lookup field in the Child Object **Obj2** pointing to **Obj1** as parent.

2. Update the Lookup field of all the records in **Obj2** with a value from the **Obj1** (Related field)

3. Then we convert the Look up field to Master Detail relation.

Scenario2: If there are no pre existing records in the Obj2 then?

4)Consider a scenario

- I'm trying to implement Pagination. Initially i want to display 50 records and when user click on Next button, the records stating from 51 to 100 should get displayed. How do I accomplish this.

Answer:

- The key question here is how do we fetch next 50 records when user clicks on 'Next'?
- One possible way to implement this is to have 'OFFSet' used in SOQL which fetches the records.

Eg: SELECT Name from Merchandise__c

where Price__c > 5

Order by Name Limit 100

OFFSET 50

5) **Consider a scenario**

- I have two workflow Rules and two fields F1 and F2.
- When ever F1 is updated to value= 10, WF1 fires and updates F1 value to 20 and F2 value to 30
- When ever F1 values= 20 there is another Workflow WF2 fires which will update F1 to 10 and F2 to 20
- What will be the outcome of this Workflow rule.

Answer:

- This scenario will cause recursive Workflow rule
- This will exhaust the governor limit and result in error

6)Consider a scenario

- I have a User, Who will leave the organization tomorrow. He is basically a manager and there are 15 users below him.
- Now when this user leaves the organization I would generally inactivate the User.
- But now my concern is if I inactivate this user What happens to the Role hierarchy? the assignment rules, Approval processes, the records created by him and records to which he is the default owner like leads and cases.
- what would be best possible solution to keep this application intact and running and yet have this user deactivated?

Answer:

- To prevent users from logging into your organization while you perform the steps to deactivate them, you can freeze user accounts.
- So in this way until you find ways to remove this User from Role hierarchy/assignment rules/update the Owner of the records created by him / from any place where this user is used, we can make use of FREEZE button on the user record.

Note:

1. When we click on FREEZE button, the user will not be able to login to the application any more.

2. Freezing user accounts doesn’t frees the user licenses available for use in your organization. We have to de activate the user to free the license.

7)Consider the scenario

- I want to delete 20000 records and I don’t want them to be recovered from recycle bin.

OR

- I want to do a mass delete on set of records and don’t what them getting into recycle bin.
- What possible options do I have?

Answer:

- Yes this is possible, Use Hard Delete Option

8)Consider the scenario:

- Let say I have a page which displays the set of records from Account object and I'm using a standard controller.
- Now I have two users belonging to same Profile. When they login and view this page, they get a message "Insufficient privileges".
- What could be the reason for this? Or who would u arrive at a solution?

Answer :

- Notice below points:
- Question speaks about standard Object and Standard Controller.
- Also remember permission to a object is given by Profile.
- So we need to check if the user has permission to read data of this Object.
  Only if the permission is given to the user,he'll be able at access them else he will get an error message as "Insufficient privileges"

9)Consider the scenario:

- I have Standard Controller and Controller Extension.
- You can write all that logic in Controller Extension which can be written in Custom Controller. Also both Controller Extension and Custom controller execute in System Mode.
- So Why do we need Custom Controller ?

Answer:

- 1st point Controller Extension can't exist on its own.
- It has to be implemented on a Standard Controller or a custom controller.
- So keeping the above point in mind, Let's say certain methods needs to be executed in User Mode and certain in System Mode.
- In this scenario it makes absolute sense to User Standard Controller with Custom Extension.
- Where in using Standard Controller provides all preexisting features of Force.com platform.
- But note that When we use Standard Controller All the Sharing rules, permissions of a user are respected.
- So if this what we wanted then we should go for an implementation of this sort.
- Other wise if we are building all features on own like Save Edit Update and delete then we should be using Custom Controller.