Admin Questions

Q1 What is a Cloud?
"The cloud" refers to servers that are accessed over the Internet, and the software and databases that run on those servers. Cloud servers are located all over the world. By using cloud computing, users and companies do not have to manage physical servers themselves or run software applications on their own machines.
Types of Cloud

- Private cloud
- Public Cloud
- Hybrid Cloud
- Multi Cloud

Q2 What is Cloud Computing?
Cloud Computing is delivery of computing services such as servers, storage, software's, databases, networking and more over the internet. We have to pay only for these services which lower your operating costs, run your infrastructure more efficiently and scale as your business needs change

Q3 What are Cloud Computing Services?
Infrastructure as a Service (IaaS)
Platform as a Service (PaaS)
Software as a Service (SaaS)

Q4 What is Infrastructure as a Service (IaaS)?
refers to cloud computing services that supply an on-demand IT infrastructure—servers and virtual machines (VMs), storage, networks, operating systems—from a cloud provider on a pay-as-you-go basis.

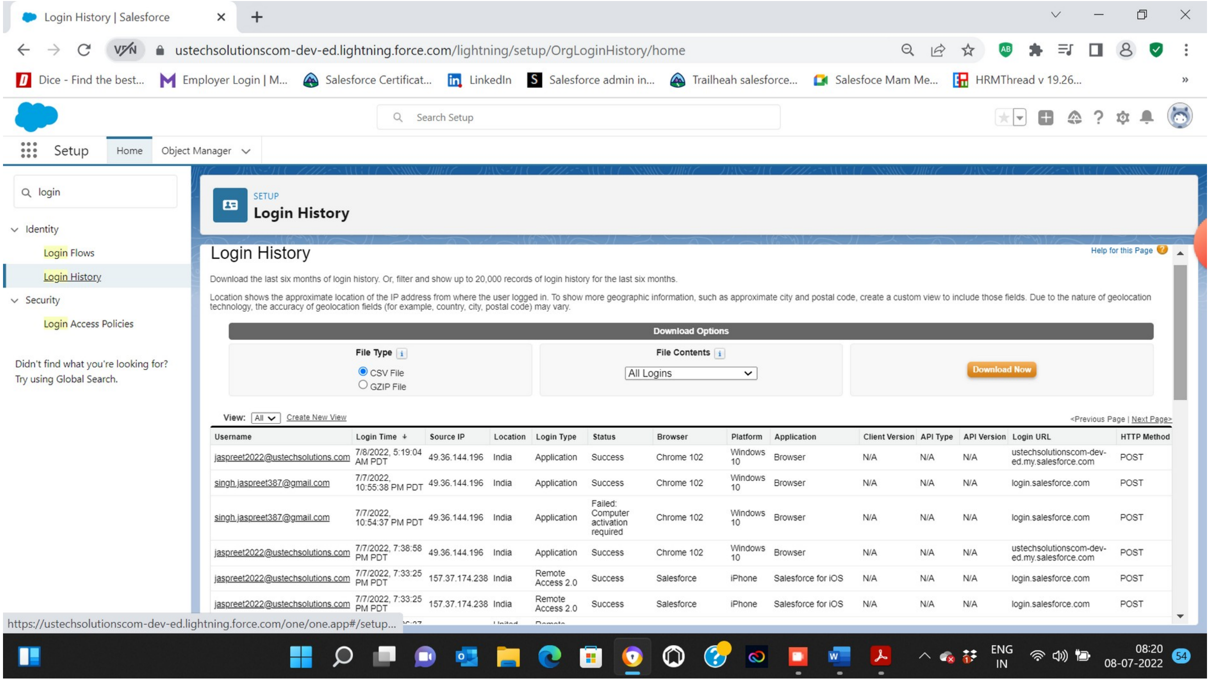
Q5 What is Platform as a Service (PaaS)?
Platform as a service refers to cloud computing services that supply an on-demand environment for developing, testing, delivering and managing software applications. PaaS make it easier for developers to quickly create web or mobile apps, without worrying about setting up or managing the underlying infrastructure of servers, storage, network and databases needed for development.

Q6 What is Software as a Service (SaaS)?
Software as a service is a method for delivering software applications over the Internet, on demand and typically on a subscription basis. With SaaS, cloud providers host and manage the software application and underlying infrastructure and handle any maintenance, like software upgrades and security patching. Users connect to the application over the Internet, usually with a web browser on their phone, tablet or PC

Q7 What are the benefits of cloud computing?
1. Cost Reduction
2. Speeding up Business
3. Improve Productivity
4. Performance Enhancement
5. Strengthen Security

Q8 What is Salesforce and the CRM tool in salesforce?
Salesforce is a CRM platform. All Salesforce products run entirely in the cloud so there's no expensive setup costs, no maintenance and employees can work from any device with an internet connection – smartphone, tablet or laptop. It makes CRM easy to use for small businesses and large-scale enterprises
CRM stands for Customer Relationship Management. It helps connect to customers, better understand their needs, identify new opportunities to help, address any problems faster and deploy customer-focused apps fast.

Q9 How can I check the login history of a user?
Setup>>quick find >> login history

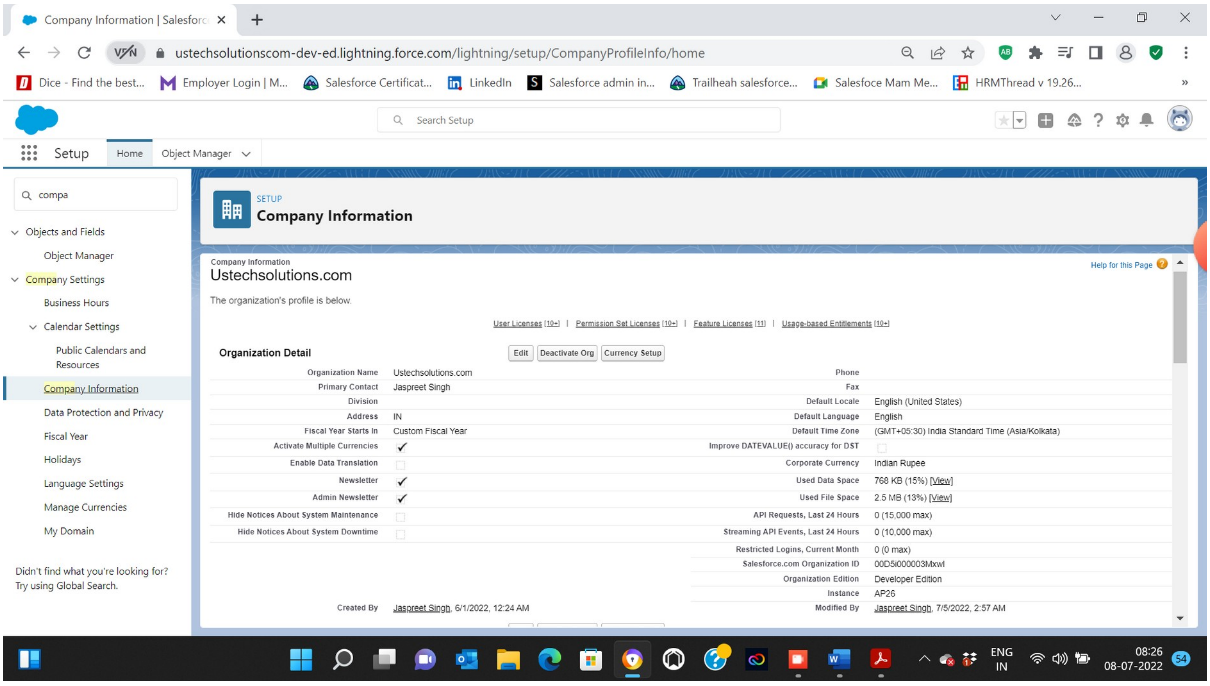


Q10 What is Company Information?

Setup>>quick find >>Company Information

It provides all the information about your company or organization.

It contains organization Name, Primary Contact, address, fiscal year , multiple currencies , default locale, default language, time zone user licence, Permission set Licences, feature Licences related information

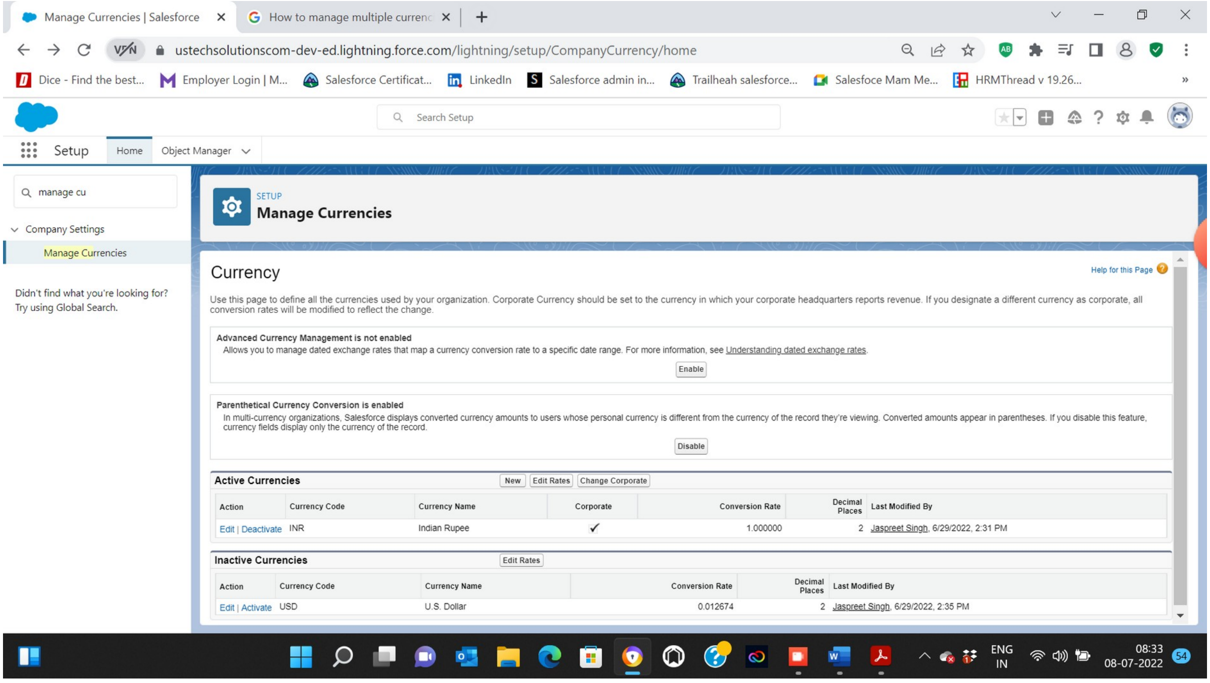


Q11.What is the standard and custom Fiscal Year?

Standard Fiscal Year - Follows the Gregorian calendar year, but starts on the first day of any month you choose. Custom Fiscal Year follows a custom structure we define. If our fiscal year follows a different structure from the Gregorian calendar, we can define a custom fiscal year that meets our needs.

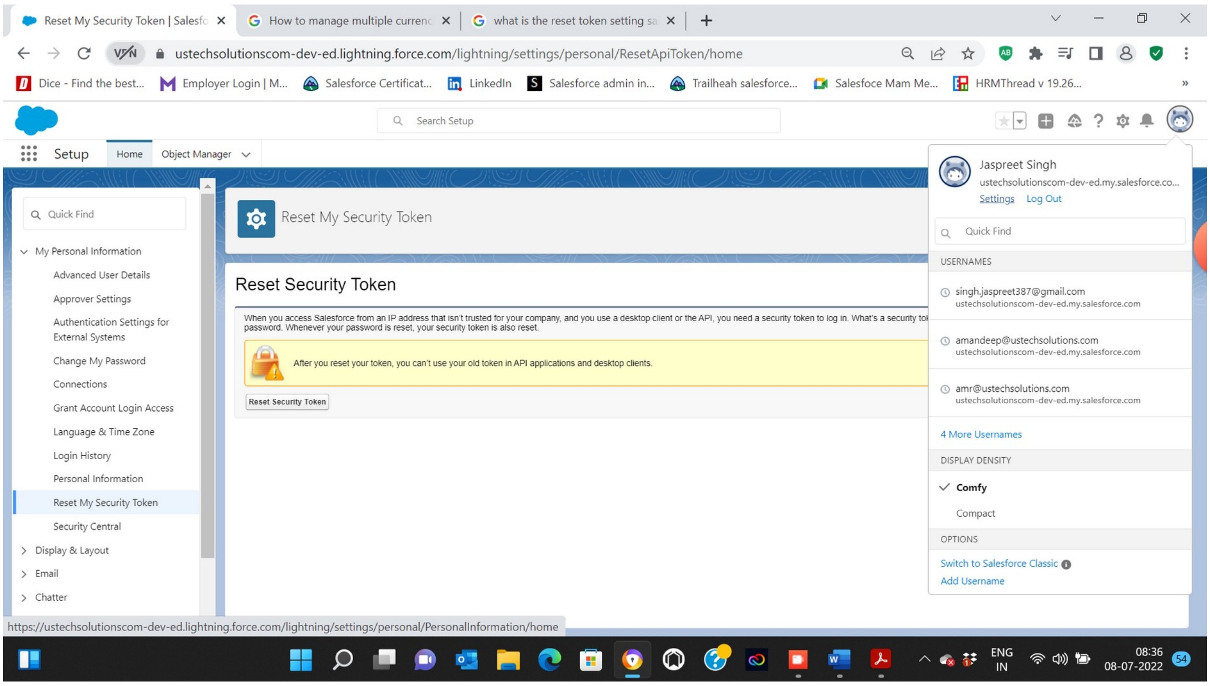
Q12.How to manage multiple currencies in Company Information?

Enable multiple currencies for your organization (from company information). To setup your corporate currency, from Setup>>Quick>>then select Manage Currencies>>then click Change Corporate.

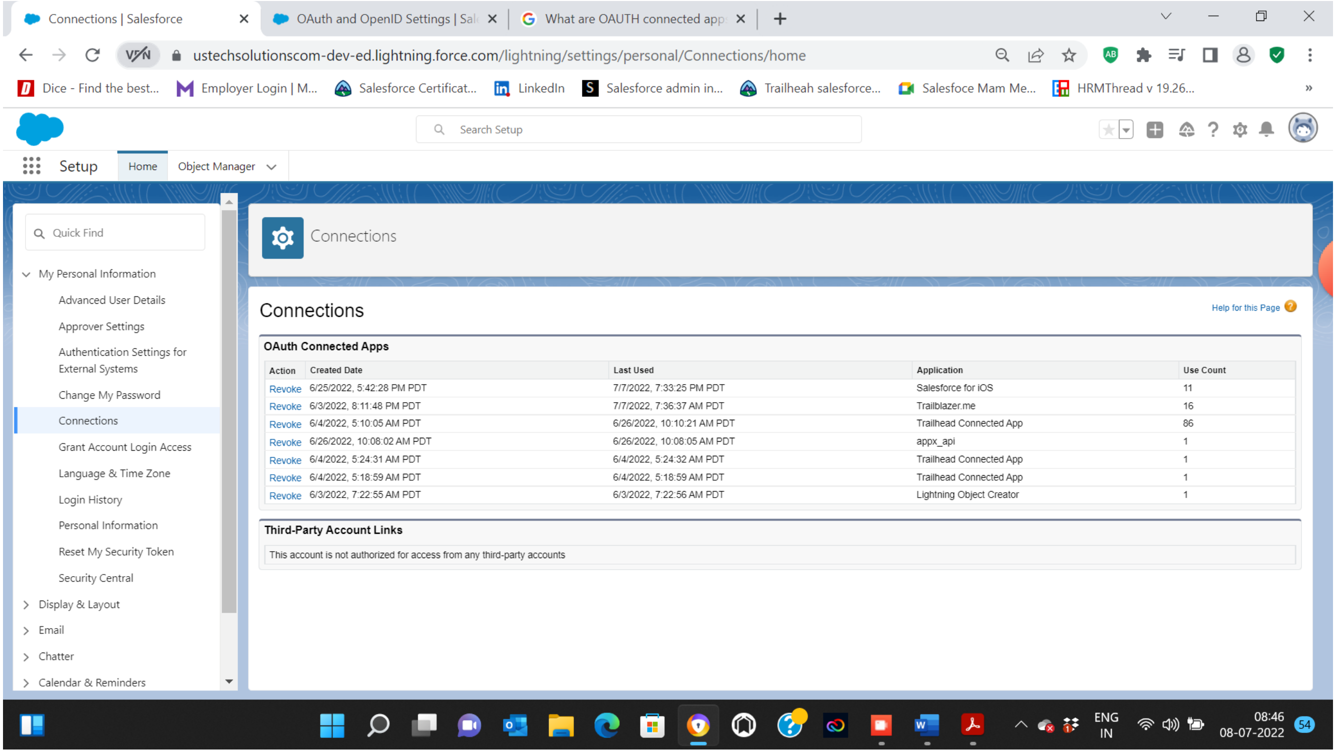


Q13.What is the reset token setting?
When you access Salesforce from an IP address that isn't trusted for your company, and you use a desktop client or the API, you need a security token to log in. A security token is a case-sensitive alphanumeric code that's tied to your password. Whenever your password is reset, your security token is also reset.

personal settings>>quick find>> Reset My Security Token

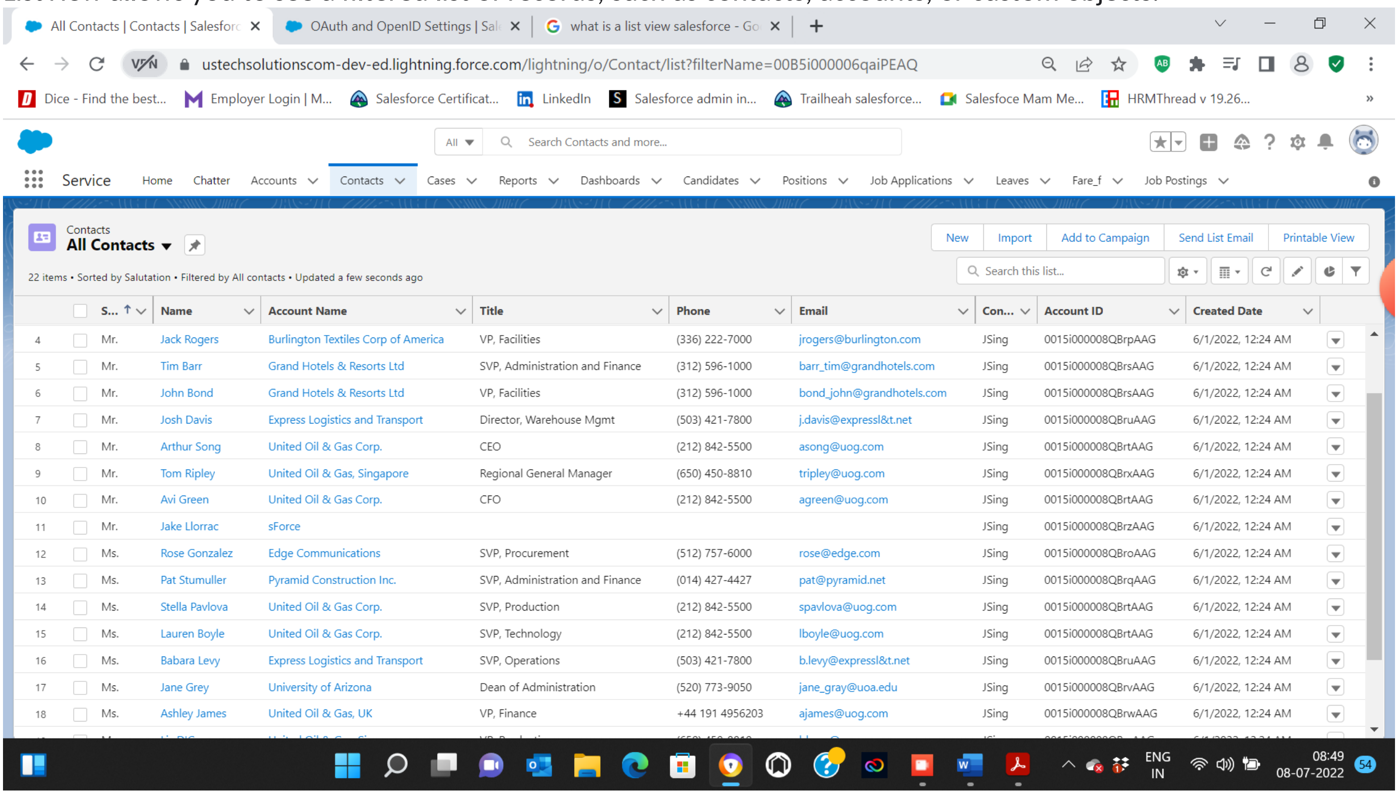


Q14.What are OAUTH connected apps in settings?
OAuth-enabled connected apps are integrated with Salesforce, so they can access a subset of your Salesforce data after you explicitly grant each app permission
Personal settings>> Quick Find>>Connections



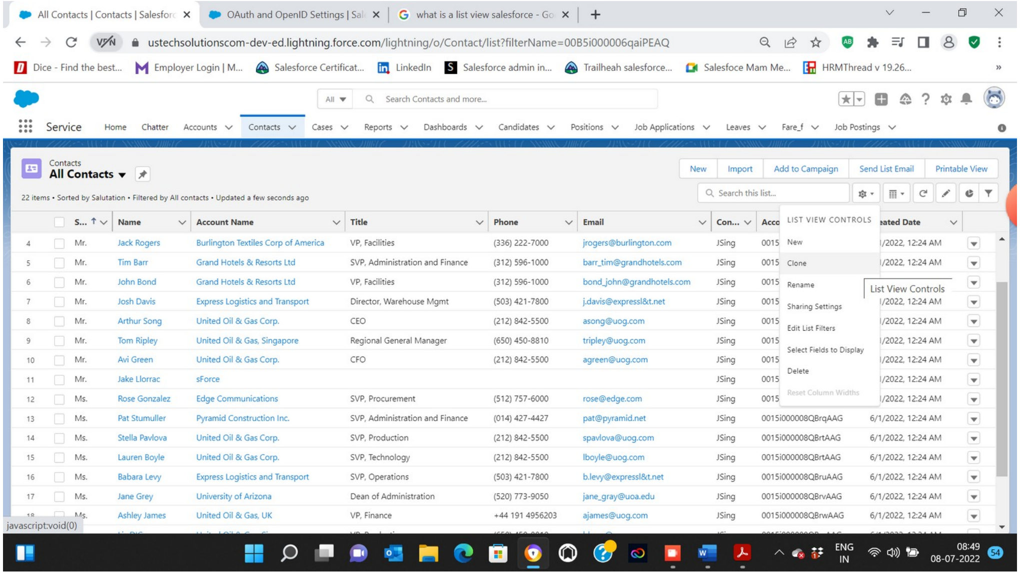
Q1 What is a Listview?

ListView allows you to see a filtered list of records, such as contacts, accounts, or custom objects.



Q2 What are the various Listview controls?

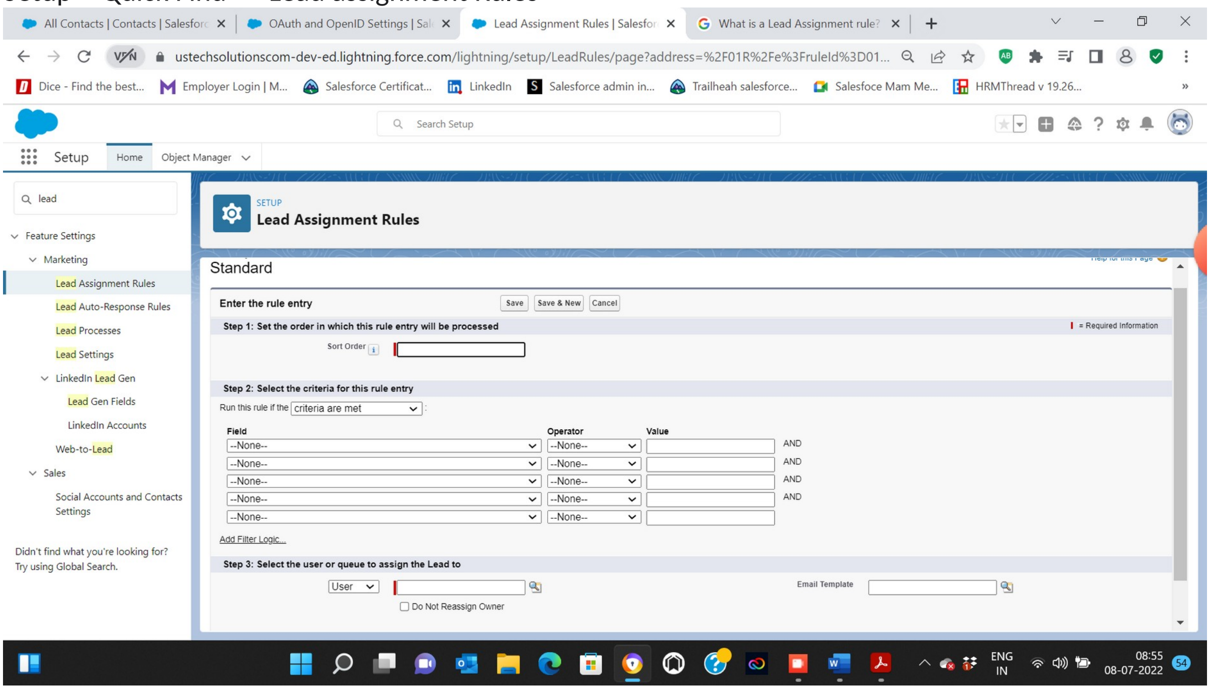
New, Clone, Rename. Sharing settings, Edit List Filters, Select Fields to Display, Delete, Reset Column Width.



Q1 What is a Lead Assignment rule?

Assignment rules automate your organization's lead generation and support processes. Use lead assignment rules to specify how leads are assigned to users or queues.

Setup>>Quick Find >> Lead assignment Rules



Q2 What is a user in an organization?

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

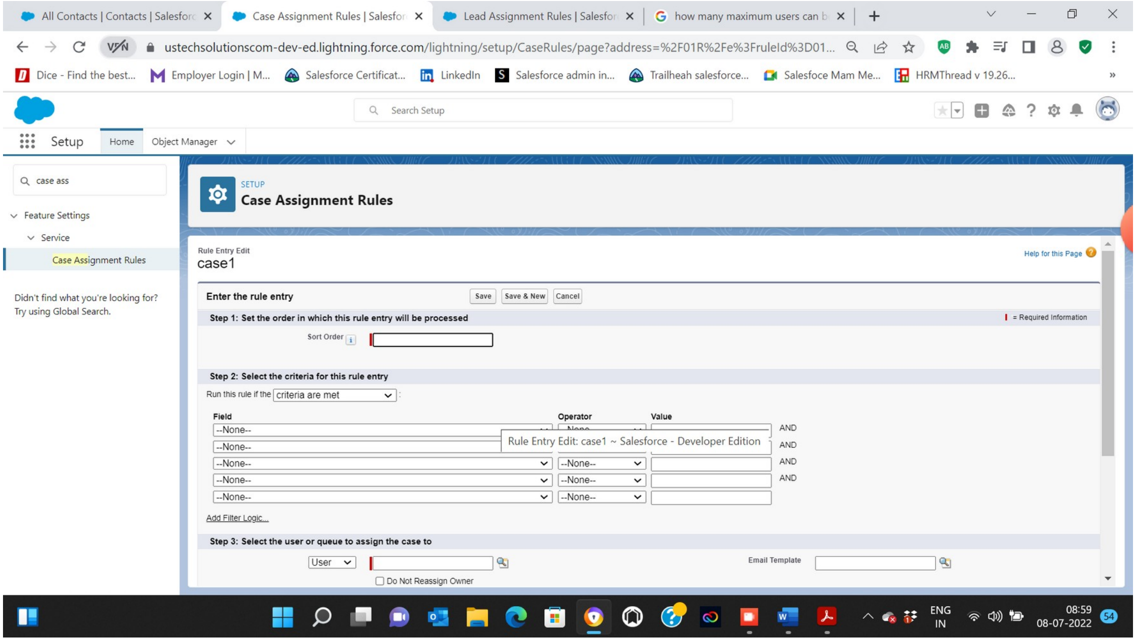
Q3 How many maximum users can be added at a time?

10 users

Q4 What is a Case assignment rule?

Assignment rules automate your organization's lead generation and support processes. We use case assignment rules to specify how cases are assigned to users or queues.

Setup>>Quick Find >> case assignment Rules

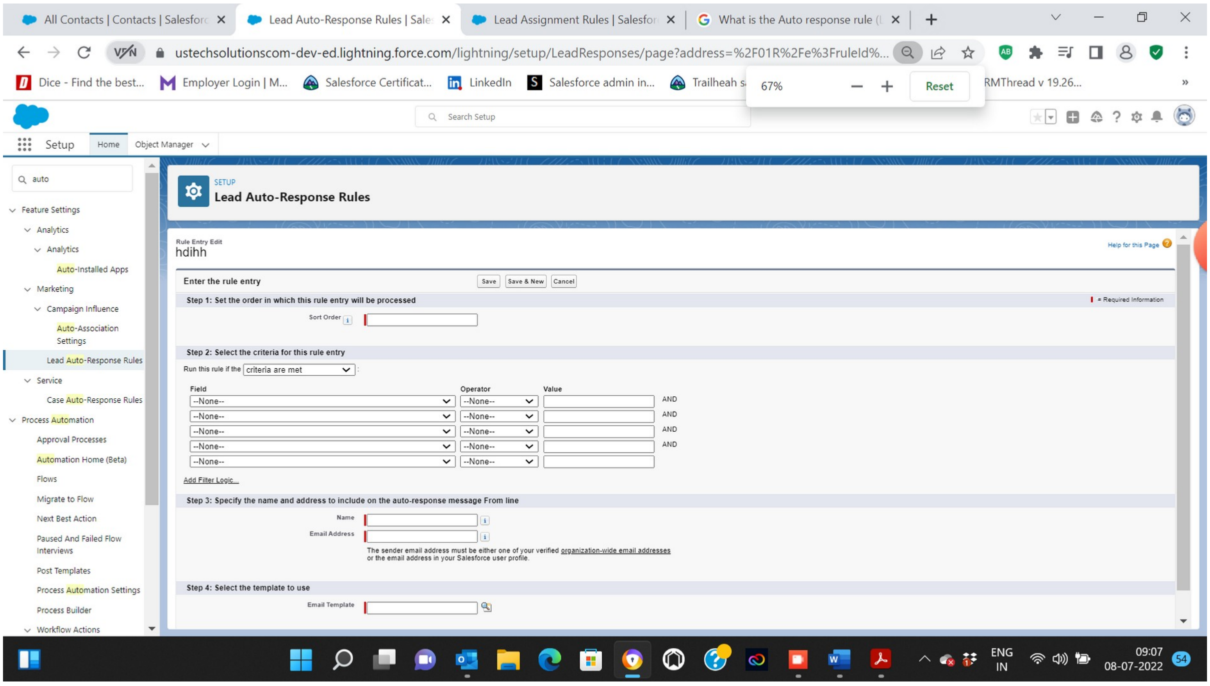


Q5 How many lead or case assignment rules can be active at a time?
1 rule

Q6 What is a Queue?
Queue in salesforce is a collection of records that doesn't have any owner. Users who have access to the queue can examine every record that is in it and claim ownership of the one's they want

Q7 What is the Auto response rule (Lead/Case)?
Auto-response rules let you automatically send email responses to lead or case submissions based on the record's attributes. For example, you can send an automatic reply to customers to let them know someone at your company received their inquiry.

quickfind→auto response rule



Q8 What is an Email Template?
An email template is a pre-defined email layout, that may already include content like images or text. Rather than create a new email from scratch each time, you can use a template as a base. We can create four different types of email templates: text, HTML with Classic Letterhead, custom, and Visualforce

Q9 What is an application? Types of applications?
An application in salesforce is a collection of tabs that work together as a single unit to give functionality. There are two types of applications

- Standard Object
- Custom Object

Q10 What is an Object? Types of Objects?
Objects in salesforce are database tables that permit you to store data that is specific to an organization
Types of Objects

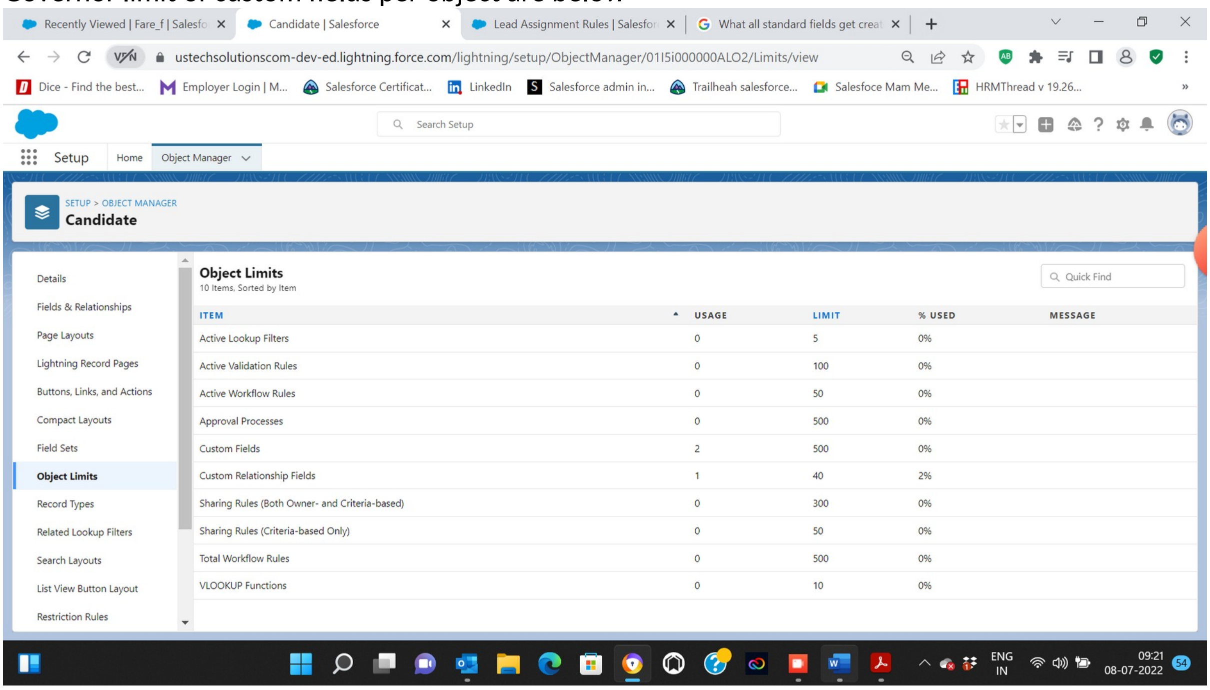
- Standard Object
- Custom Object

Q11 What is a Field? Types of fields?
A Field in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.
Types of Fields

- Standard Fields
- Custom Fields

Q1 What is a Custom Object?
Custom objects in salesforce are objects that we create to store information

Q2 What all standard fields get created when a new custom object is created? Name of those standard fields?
Ans: CreatedBy, LastModifiedBy, Owner, CurrencyISO, Name (Record Name)

Q4 Governor limit of custom fields per object?
Governor limit of custom fields per object are below


Q5 What are relationship fields? What are the types of relationship fields?
A relationship field is a custom field on an object record that contains a link to another record
Types of Relationship Fields

- Master-Detail Relationship.
- Lookup Relationship.

- External Lookup Relationship

Q6 What is a Lookup Relationship Field? How many lookup relationship fields can be there on one object?
A Lookup Relationship Fields in salesforce links two objects such a way that we can lookup records of one object on related list of another object.
There can be 40 lookup relationships on one object

Q7 What is the Master Detail Relationship field? How many MDR fields can be there on one object?
Master Detail Relationship field links two objects in such a way, it creates a parent-child relationship among two objects. It means the records of child object are controlled by parent object. if we delete record from master (parent) object then its detailed (child) object also gets deleted automatically. There can be 2 MDR on one object.

Q8 What is the difference between Lookup relationship and MDR fields?
- There can be 40 lookup relationship fields but MDR fields are only 2
- Using MDR we can create roll-up summary field which is not available in lookup
- Lookup relationship has no relation with other records. It does not depend on any other objects, whereas a master-detail relationship has an association with other records. Means, if we delete record from master (parent) object then its detailed (child) object also gets deleted automatically. On the other hand, the lookup relationship is just a reference. It can be even blank or NULL

Q9. Can we convert a lookup relationship field to MDR? What are the considerations while converting a lookup field to MDR field?
Yes, there must be a value in Lookup relationship field of all child records. This is because a master-detail relationship does not allow for 'orphaned' child records. Once you have a lookup with each child having lookup field value then convert the lookup field to a master-detail

Q10. Can we convert a MDR relationship to lookup? What are the considerations while converting a MDR to lookup field?
Yes, we convert a master-detail relationship to a lookup relationship as long as no roll-up summary fields exist on the master object

Q11. What is a Lookup filter?
Ans: Filtering the records while looking up them from the source object is Lookup filter. It is available in both types of relationship fields lookup and MDR.

Q12 What is the Reparenting option in MDR?
Ans: Child records can be reparented to other parent records after they are created.

Q3 What is a Junction object?
In order to create Many-to-Many relationship in between objects we use Junction object.

Q4 How can we create many to many relationships between objects?
Using Junction Objects, we can create many to many relationships between objects

Q5 What is a Rollup summary field?
A Rollup summary field in salesforce created on master object it calculates sum, max, min, count (aggregate functions) of all records of child object and display them on parent records

Q6 On which object we can create a rollup summary field?
Parent Object

Q7 What is the governor limit of Rollup summary fields?
25

Q8 Which type of relationship is required for Rollup summary fields?
Master-detailed relationship

Q9 What all functions are provided by rollup summary fields?
Count, Sum, Max, Min

Q2 What are Formula Fields?
Formula in Salesforce are used to calculate custom fields, validation rules, Flow logic etc. These are read-only fields that automatically calculate a value based on other fields or a formula. Any change in expression or formula will automatically update the value of formula field. It can reference the value of another custom or standard field using a merge field.

Q3 What are the return types of formula fields?
Text, Number, Date, Date-Time, Time, Currency, Percent, Checkbox

Q4 What is the similarity between a rollup summary and a formula field?
Both are read only.

Q5 What are the differences between rollup summary and formula fields?

- The roll-up summary field performs operations like count, sum, max and min on the set of child records and returns a value. However, the formula field is used to perform arithmetical logical operations in a single record associated with it. It cannot perform the operation as rollup summary do.
- Formula field can be used in any type of relationship but rollup summary requires master-detail relationship only.

Q6 What is IsPickVal (picklistname, Textliteral) function?
It Checks if in given picklistname (picklist field), the value selected is equal to textliteral or not. If it matches this function return true else false.

Q7 What is the use of IsBlank(expression) function?
The ISBLANK function returns TRUE when a cell is empty, and FALSE when a cell is not empty

Q8 At what time formula fields values are calculated?
All formula fields are calculated at run time.

Q1 What is a Process builder?
Process Builder is an automated Salesforce tool that allows you to control the order of actions or evaluate the criteria for a record. Process Builder gives you the ability to use straightforward 'If/Then' logic to easily add automation to your Salesforce environment

Q2 What is the difference between Workflow rules and a Process Builder?

- Process Builder is capable of updating any field where workflow is limited to certain fields.
- In Process Builder you are able to control multiple actions set and the order at which they're triggered
- Workflow Rules has only 4 Actions (Tasks, Email Alerts, Field Updates, Outbound Messages); whereas Process builder perform 11 actions (Apex, create a record, Email Alerts, Flows, Post to Chatter, processes, Quick Action, Quip, Send Custom Notification, Submit for Approval, Update records)

Q3 What is a Custom Notification?
Admin can be sent a custom notification when any important event occurs. custom notifications can be sent via a process in Process Builder, a Flow in Flow Builder, or invocable action API. Admin can add recipients, subject and content in Custom Notification

Q4 What is Invocable Process?
An invocable process is process that starts when another process invokes it.

Q5. What is Inbound message and Quip in Process?
Inbound message: Messages received by your users from senders outside the set of associated domains for your organization

Quip: Create documents, chat rooms, and folders when important events occur. Attach a document to a record so that your users have information in context
Quip is a collaborative productivity software suite for mobile and the Web. It allows groups of people to create and edit documents and spreadsheets as a group, typically for business purposes.

Q1. What is Data Security?
Data Security means securing and sharing data among other users or groups of an organization using sharing settings, security settings. We can also make data visible or hide according to user or organization need.

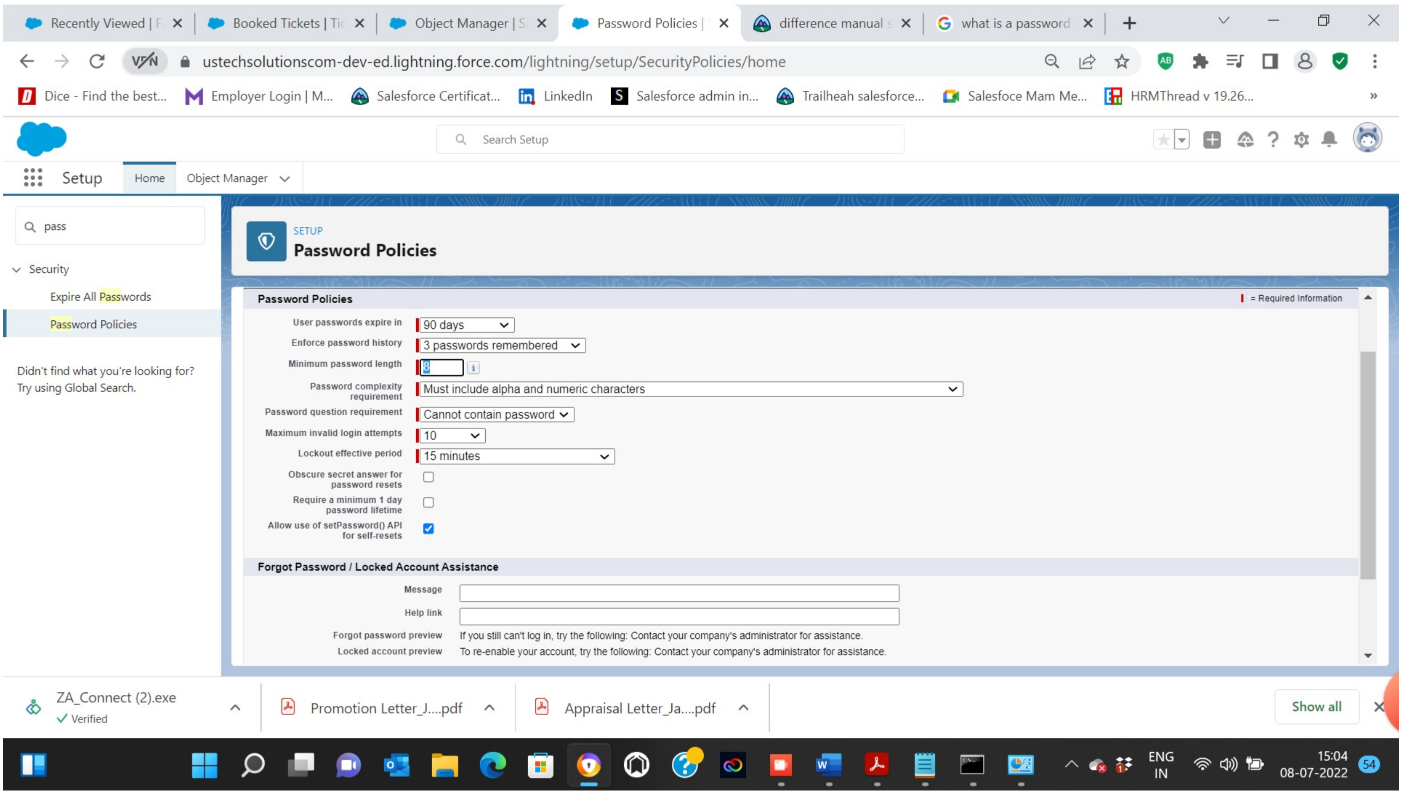
Q2. How data security is implemented in Salesforce?
In Salesforce data security is implemented using Owd, Api, Trusted IP settings, sharing settings, app settings, field security, sharing rules, profiles, permission sets etc.

Q3. What are the different levels of security?
Organization Level
Object Level
Field Level
Record Level

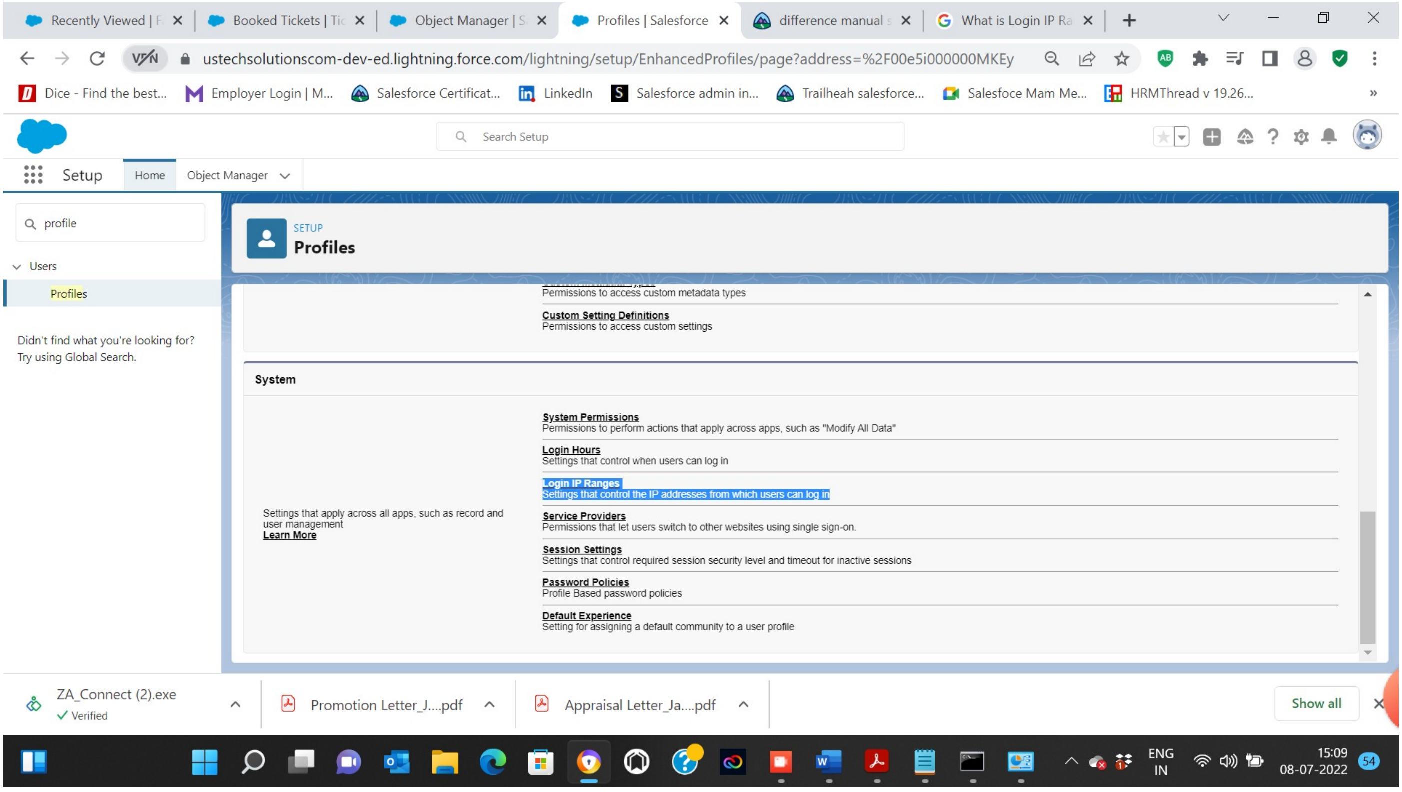
Q4. What is Organization Level Security? And its ways?
In Organization Level Security, we secure the access to our organization by unauthorized users. We achieve this by maintaining a list of Trusted IP addresses, setting password policies, and limiting login access to certain hours and certain locations.

Q5 What is a password policy?
We can set up different password policies to strengthen passwords in salesforce. Some of them are User password expires in, minimum password length, maximum invalid login attempts, Lockout effective period and more shown below

To set them go Setup>>Password policies



Q6 What is Login IP Range?
Login IP ranges and trusted IP ranges to control the IP address ranges from which your users can log in to Salesforce
To set Login IP Range go to Setup>>profile>>scroll down to system >> Login Ip Ranges



Q5. What is Object level security? And how is it implemented?
In Object Level Security, we set permission on a particular object means to say that we can give or revoke CRUD (Create, Read, Update, Delete) Permissions to user or group of users.

Q6. What is a Profile?
A profile is a collection of settings and permissions according to which user have access to data. Using profile, we can set object permissions, field permissions, App Settings, IP ranges and login hours, system permissions, Apex Class Access and more

Q9 What is a Permission Set?
A permission set is a collection of settings and permissions that give users access to data, various tools and functions.

Q10 What is the difference between a profile and a permission set?
A permission set is a collection of settings and permissions that give users access to data, various tools and functions. The settings and permissions in permission sets are same in profiles too, but permission sets extend users functional access without changing their profiles.

After Permissions sets user Total permission get extended so we can say that:

Total Permissions (after permission set) = Permission set + Profile Permissions

A Profile can be assigned to multiple users but permission set is provided when users are few.

Q11 What are the types of profiles?
Standard profiles
Custom profiles

Q12 Can a user be associated with 2 profiles?
No

Q13 Can a single profile be assigned to 2 users?
Yes

Q14 What is field level security? Ways of field level security?
This setting controls which user profile can view, edit, delete, update, create record on specific field. Ways to achieve this is using profile, permission sets, set field level security button (making visible or read only), page layout (read only)

Q15. Can we delete a user from the organization?
No

Q16 What is the difference between freezing a user and deactivating a user?
Freeze is temporarily disabling user from organization. We use this Freeze when user will return after long break/holidays (returning users).
Whereas deactivating a user permanently disable the user from org (non-returning user) and free Licence used by user, which we can assign to another user.

Q1 What is Record Level Security?
In an Org. every record is owned by user or a queue. Using record level security, we provide access to users to some object records but not all.

Q2 What are the ways of Record level Security?
OWD (Org Wide Default)
Sharing Settings
Role hierarchy
Sharing rules
Manual Sharing

Q3 What is OWD? What all access levels are in OWD?
OWD stand for Org Wide Default. This is basic record level security which define what records can be accessed in which mode whether Private, Public read Only, Public Read/Write, Public Read/Write/Tranfer.

Q4 What is the difference between Public Read Only and Private OWD access Level?
Public Read only: Only Owner and users above hierarchy has read/write access
And user below hierarchy has Read only access

Private: Only Owner and users above hierarchy has read/write access
And user below hierarchy no access.

Q5 What is Controlled by parent access level?
Controlled by access: Consider an example Parent1 is a parent object and child1 is a child object. When controlled by parent is enabled, then child1 record can be viewed or accessed by those users who have those permission to Parent1 object. If user don’t have permission access to Parent1 then he will also not able to access Child1

Q6 What is Role Hierarchy?
In salesforce, roles are defined so as to increase the data visibility a particular user has. The data visibility can be increased using sharing rules or by building role hierarchy. Role hierarchy allows the user sitting in higher level have access of records owned by users having role lower in hierarchy

Q7 What is the difference between Role and a Profile?
Profile: Profile is basically a object level access and field level access and It is required for the users.

Role: Role is basically a record level access and it is not required for users

Q8 What is the Sharing Rule? Types of sharing rule?
Using Sharing Rules, we can share particular records using sharing rule type that is “criteria based” or “owner based”.

Using “criteria based” rule type we share records with other public groups, roles and roles and subordinates, which meets the criteria which we define

Using ““owner based” rule type we can share record owned by Members: public groups, roles and roles and subordinates to Other public groups, roles and roles and subordinates

Q9 What is the Governor limit of sharing rule?
Default limit is 300

Q10 What is Manual Sharing?
Manual Sharing

Manual Sharing allows the users to share the record to users who would not have access to the record any other way.

Only these 4 users can manually share the record:

- Record Owner
- A user in a role above the owner in the role hierarchy.
- Users granted “Full Access” to record.
- Administrator

We can set access level to Read only And Read/Write

Q11 What is the difference between Sharing rule and a manual sharing?
Sharing rule is a set of predefined conditions on an object, and if an object's record meets these conditions, the record is automatically shared to a predefined role or a user group. All records of the object that meet the conditions will be shared, there is no way to stop that without changing the rule. Sharing rules are created and managed by admins. Whereas in Manual sharing user manually share particular records to another user.

Q12 What is a Group?
Groups in Salesforce are used to define sharing rules. A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy

Q13 If the OWD access level of the account is set to Private then what will we be the default access level of opportunity?
Private

Q1 What is Data Management?
Data management in Salesforce deals with Import/Export of data or records to/from a Salesforce organization.

Q2 What are the tools for data management?
- Data Import Wizard
- Data Export Wizard
- Data Loader

Q3 What is a Data Import Wizard?
The Data Import Wizard makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts

Q4 How many records can be imported using the Data Import Wizard?
50000

Q5 What standard objects are supported by Data Import Wizard?
accounts, contacts, leads, solutions, campaign members

Q6 What is a Data Export Wizard/Monthly Export Service?
This is a Salesforce functionality that allows you to perform manual or scheduled exports of your data on a weekly or monthly basis

Q7 Till how many hours the download link for the export file is active?
48 hours

Q8 What is a Data Loader?
Data Loader is a client application for the bulk import or export of data. Use it to insert, update, delete, or export Salesforce records.

Q9 What is an External Id? What all types of fields can be made as an external id?
An external ID is a custom field that has the External ID attribute, meaning that it contains unique record identifiers from a system outside of Salesforce. When you select this option, the Data Import Wizard detects existing records in Salesforce with external IDs that match those values in the import file.

Types of fields can be made as an external id: Text, email, number fields

Q10 What is the difference between a Data Import Wizard and Data Loader?
- Data Import Wizard is used for simple imports of data whereas Data loader used for complex imports of data
- Data Import Wizard can load up to 50,000 records whereas Data loader can load up to 5,00,000 records.
- Data Import Wizard supports all the custom objects and only a few standard objects like Account, Contact, Campaign members, person accounts, Leads, and Solution whereas Data loader supports all custom and standard objects.
- Data Import Wizard supports schedule export whereas Data loader doesn't support scheduled export.
- Data Import Wizard Delete operation is not available but in Data Loader Delete operation is available.
- Data Import Wizard Cannot import cases and opportunity but Data loader can import cases, events, tasks, and opportunities
- While importing, in Data Import Wizard duplicates can be ignored but in Data loader duplicates cannot be ignored.
- Data Import Wizard doesn't require installation but on the other hand Data loader requires installation.

Q11 What is the difference between Export and Export All?
Export: It is used to export the Salesforce Data (excluding recycle bin's data) into our system.

Export All: It is used to export the Salesforce Data (including recycle bin's data) into our system.

Q12 What is Hard Delete?
Data Loader has an option called Hard Delete which basically deletes the record permanently without storing a copy of it in Recycle Bin

Q13 If I want to import 30000 lead records, which tool can be used?
Data Import Wizard

Q14 If I want to import 49000 user records, which tool can be used?
Data Import Wizard

Q15 If I want to import 100000 records for contacts then which tool can be used?
Data Loader

Q1 What is a Report?
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Q2 What are the Types/format of Report?

- Tabular Report
- Summary Report
- Matrix Report
- Joined Report

Q3 What is a Tabular Report?
Tabular reports are the simplest and fastest way to look at your data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row.

Q4 What is a Summary Report?
Summary Report is the second Salesforce report format which allows users to sort data group by rows only and display subtotals. Summary reports can have graphs and be used in dashboards

Q5 What is a Matrix Report?
Matrix reports allow you to group records both by row and by column. These reports are the most time-consuming to set up, but they also provide the most detailed view of our data. Like summary reports, matrix reports can have graphs and be used in dashboards.

Q6 What is a Joined Report?
A joined report consists of up to five report blocks, which you add to the report to create multiple views of your data. For each block, you can add regular and summary fields, create standard and cross-block custom summary formulas, apply filters, and sort columns.

Q7 What is a Report Type? And what is custom report type?
A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects
Custom report types give you access to custom objects in Salesforce, or custom views of standard objects (like Opportunities), which administrator configures.

Q8 What is a Bucket Field in reports?
It allows us to categorize values for a field in a report. For example, consider a field Rating for account object. We can bucket this field as such way keeping two values (hot and warm) under same bucket and remaining value un-bucket

Bucket Name	Bucket Fields
Hot&warm	hot and warm

Un-bucket Field >>Cold

Q9 What is Conditional Formatting in reports?
Conditional formatting on Salesforce reports enables you to highlight cells in colours, to add extra emphasis to the key metrics on the bases of specify conditions

Q10 What is a Dashboard? How many components can be there on a dashboard?
Salesforce dashboards is a visual display of this data and it present multiple reports side-by-side using dashboard components on a single dashboard page layout. Dashboard components come in various chart types, tables, metrics, and gauges, and you can customize how data is grouped, summarized, and displayed for each component.

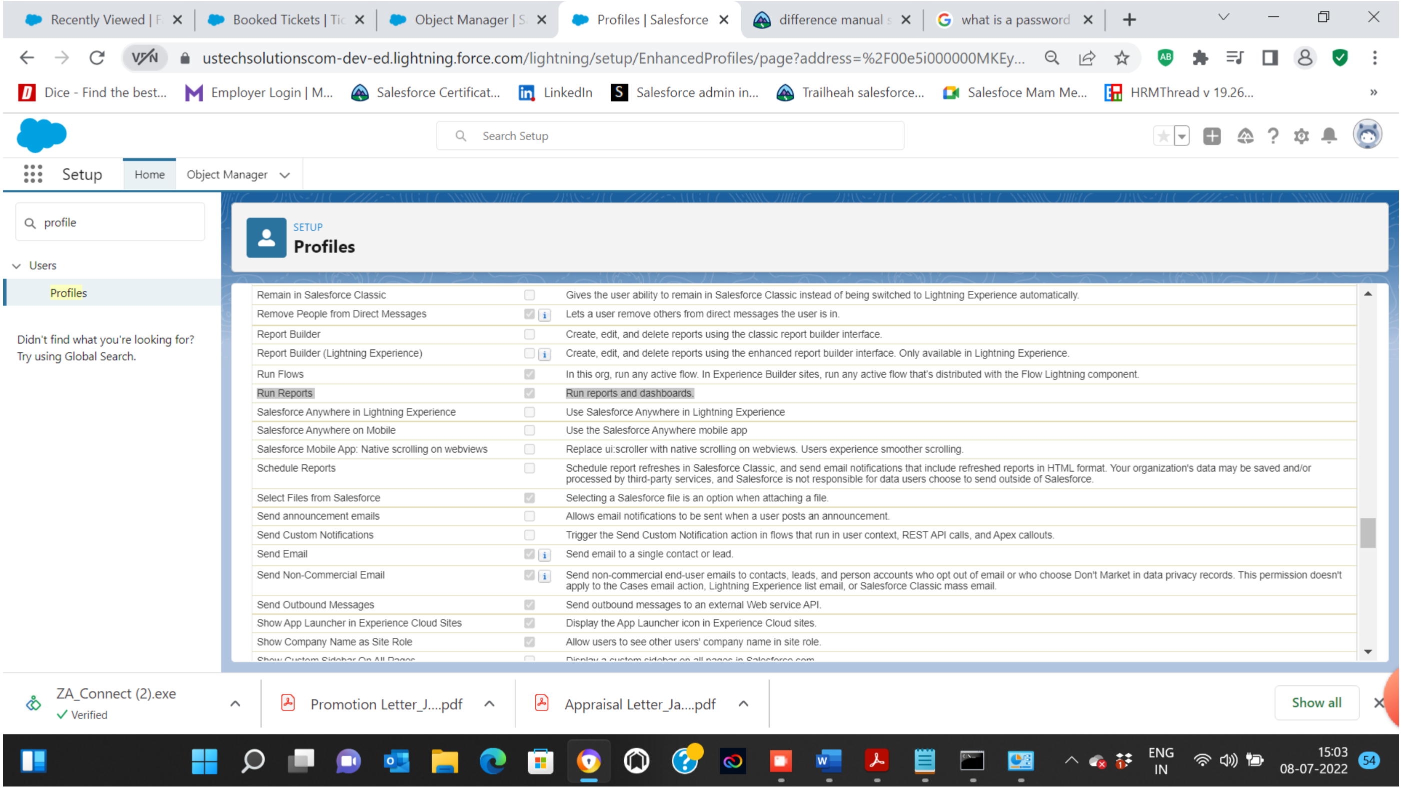
There are 20 components on a Dashboard.

Q11 What is Dynamic Dashboard?
Dynamic dashboards enable each user to see the data they have access to. With a dynamic dashboard, you can control data visibility without having to create a separate dashboard, with its own running user and folder, for each level of data access.

Q12 How security is implemented in Reports and Dashboards?

We can implement security in salesforce using profile and permission sets by allowing and restricting them to run report and dashboard

Setup>>Quick Find>> permission set/profile>>Select Profile>>System Permission >> Check or Un-check the “Run Report and Dashboard”



Moreover, each report and dashboard are stored in a folder, and the report and dashboard accessibilities are controlled by the folder that stores the report and dashboard--not by the report or dashboard itself
Three access levels for each folder: view, edit, and manage.

Q13 How many blocks can be added in Joined reports?
5 Blocks