Question/Answers of Admin

Q1 What is a Cloud?

Ans: The cloud refers to servers that are accessed over the Internet, and the software and databases that run on those servers.

Q2 What is Cloud Computing?

Ans: Cloud computing is the delivery of computing services—servers, storage, databases, networking, software, analytics, intelligence and more—over the Internet ("the cloud") to offer faster innovation, flexible resources and economies of scale. You typically pay only for cloud services you use, helping lower your operating costs, run your infrastructure more efficiently and scale as your business needs change.

Q3 What are Cloud Computing Services?

Ans: Types of 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)?

Ans: The most basic category of cloud computing services. With IaaS, you rent 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)?

Ans: Platform as a service refers to cloud computing services that supply an on-demand environment for developing, testing, delivering and managing software applications. PaaS is designed to 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)?

Ans: 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?

Ans: Cost, Speed, Global scale, Productivity, Performance, & Security.

Q8 What is Salesforce and the crm tool in salesforce?

Ans: Salesforce is world's number #1 CRM platform. Salesforce began with the vision of reinventing Customer Relationship Management (CRM). Since then, it has changed the way enterprise software is delivered and used, changing the industry forever. 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.

CRM stands for Customer Relationship Management. It helps organizations get 360 degrees view of their customers. It helps connect to customers in a whole new way. Build more meaningful and lasting relationships — better understand their needs, identify new opportunities to help, address any problems faster and deploy customer-focused apps lightning fast. With a single view of every customer interaction you can sell, service and market like never before.

Q9 How can I check the login history of a user?

Ans: From Setup, enter Login History in the Quick Find box, then select Login History. You can view and download your org's login history for the last 6 months.

Q10 What is Company Information?

Ans: The Company Information page shows all the important information about your company: Default Language, Default Locale, Default Time Zone, Salesforce Licenses, etc.

Q11.What is the standard and custom Fiscal Year?

Ans: 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 you define

Q12.How to manage multiple currencies in Company Information?

Ans: In Setup, enter Company Information in the Quick Find box, then select Company Information and click Edit. Ensure that your selected currency locale is the default currency that you want to use for current and future records. Enable Activate Multiple Currencies, and then save your changes.

Q13.What is the reset token setting?

Ans: When you access Salesforce from an IP address that's outside your company's trusted IP range using a desktop client or the API, you need a security token to log in. A security token is a case-sensitive alphanumeric code that you append to your password or enter in a separate field in a client application.

Q14.What are OAUTH connected apps in settings?

Ans: 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. Go to your personal settings to see which connected apps have permission to access your Salesforce data. Then revoke a connected app's access, as needed.

Q15 What is a Listview?

Ans: List view allows you to see a filtered list of records, such as contacts, accounts, or custom objects.

Q16 What are the various Listview controls?

Ans: 1.new 2. clone. 3.select fields to display 4. rename 5. delete

Q17 What is a Lead Assignment rule?

Ans: Lead assignment rule is a feature in Salesforce which allows the administrators to define who should receive a lead with conditions. Example: - Depending on country Zip code we can assign the leads to the users who assigned to that Country.

Q18 What is a user in an organization?

Ans: 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.

Q19 How many maximum users can be added at a time?

Ans: You can quickly add **up to 10 users** at a time to your organization. Your Salesforce edition determines the maximum number of users that you can add.

Q20 What is a Case assignment rule?

Ans: Case assignment rules **can assign cases regardless of how cases are created**. Cases can be created manually or automatically using Web-to-Case, Email-to-Case, On-Demand Email-to-Case, the Self-Service portal, the Customer Portal, Outlook, or Lotus Notes. Organizations typically use one rule for each overall purpose.

Q21 How many lead or case assignment rules can be active at a time?

Ans: Only one case or lead assignment rule can be active at one time.

Q22 What is a Queue?

Ans: Salesforce queues are **lists of records that have no owner**. The records that are not assigned to anyone are added to a queue, and any queue member can take ownership of those records. One with queue authority can go through the records in the queue and take responsibility for the ones they wish.

Q23 What is the Auto response rule(Lead/Case)?quickfind→auto response rule

Ans: 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.

Q24 What is an Email Template?

Ans: The email template builder is a visual tool for creating rich, engaging email templates. Email templates with merge fields let you quickly send emails that include field data from Salesforce records.

Q25 What is an Application?Types of applications?

Ans: An app in Salesforce is a container for all the objects, tabs, processes, and services associated with a business function. Salesforce gives standard apps such as Sales Cloud, Call Center, Salesforce Marketing Cloud, and Community.

There are two types of application: Standard application & Custom application.

Q26 What is an Object?Types of Objects?

Ans: Objects are a key element in Salesforce CRM, as they provide a structure for storing data and are incorporated into the interface, allowing users to interact with the data.

Salesforce objects are of two types: Standard Objects & custom objects.

Q27 What is a Field? Types of fields?

Ans: Fields in Salesforce are similar in concept to a database column; they store the data for the object records. An object record is analogous to a row in a database table.

The fields are also of two types:

• Standard Field

• Custom field

Q28 What is a Custom Object?

Ans: Custom objects are the tables you create to store your data. You can create a custom object to store data specific to your organization. Once you have custom objects and have created records for these objects, you can create reports and dashboards based on the record data in your custom object.

Q29 What all standard fields get created when a new custom object is created?

Ans: CreatedBy, LastModifiedBy, Owner, CurrencyISO, Name(Record Name)

Q30 Name of those standard fields?

Ans: CreatedBy, LastModifiedBy, Owner, CurrencyISO, Name(Record Name)

Q31 Governor limit of custom fields per object?

Ans: 500

Q32 What are relationship fields? What are the types of relationship fields?

Ans: An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Types: Lookup & Master detail relationship

Q33 What is a Lookup Relationship Field? How many lookup relationship fields can be there on one object?

Ans: When you create a lookup field on an object, you can choose whether the lookup field is required or is optional. If it is set as optional, you can choose one of the following three actions if the lookup record is deleted:

• Clear the value of this field

• Don’t allow the deletion of the lookup record that’s part of a lookup relationship

• Delete this record as well

40 lookups can be created on an object.

Q34 What is the Master Detail Relationship field? How many MDR fields can be there on one object?

Ans: When you create a Master-detail field on an object, you can choose Allow Reparenting Option.

Allow Reparenting Option

By default, records in master-detail relationships cannot be reparented. However, you can allow child records in a master-detail relationship to be reparented to a different parent by selecting Allow Reparenting Option in the master-detail relationship definition.

Only 2 MDR can be created in one object.

Q35 What is the difference between Lookup relationship and MDR fields?

Ans: The Salesforce 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. On the other hand, the lookup relationship is just a reference. It can be even blank or NULL.

Q36 Can we convert a lookup relationship field to MDR? What are the considerations while converting a lookup field to MDR field?

Ans: You can convert a lookup relationship to a master-detail relationship, but only if the lookup field in all records contains a value.

Q37 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.

Q38 What is the Reparenting option in MDR?

Ans: Child records can be reparented to other parent records after they are created.

Q39 What is a Junction object?

Ans: A junction object is **a custom object with two master-detail relationships**, and it is the key to making a many-to-many relationship. A job posting fits into the space between positions and employment websites.

Q40 How can we create many to many relationships between objects?

- Creating the junction object.
- Creating the two master-detail relationships.
- Customizing the related lists on the page layouts of the two master objects.
- Customizing reports to maximize the effectiveness of the many-to-many relationship.

Q41 What is a Rollup summary field?

Ans: A roll-up summary field calculates values from related records, such as those in a related list. You can create a roll-up summary field to display a value in a master record based on the values of fields in a detail record. The detail record must be related to the master through a master-detail relationship.

Q42 On which object we can create a rollup summary field?

Ans: You define a roll-up summary field on the object that is on the master side of a master-detail relationship.

Q43 What is the governor limit of Rollup summary fields?

Ans: There is a soft limit of 25 rollup summary fields per object but that can be increased to 40.

Q44 Which type of relationship is required for Rollup summary fields?

Ans: Master detail relationship.

Q45 What all functions are provided by rollup summary fields?

Ans: Count, sum, max, min.

Q46 What are Formula Fields?

Ans: Formula field 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. A formula field can reference the value of another custom or standard field using a merge field.

Q47 What are the return types of formula fields?

Ans: Checkbox, Currency, Date, Date/Time, Number, Percent, Text, Time.

Q48 What is the similarity between a rollup summary and a formula field?

Ans: Rollup summary & formula field both can count, sum, max &min.

Q49 What are the differences between rollup summary and formula fields?

Ans: Formula fields calculate values using fields within a single record, roll-up summary fields calculate values from a set of related records, such as those in a related list.

Q50 What is IsPickVal(picklistname, Textliteral) function?

Ans: ISPICKVAL() are useful for creating validation rules and formulas that check whether a certain picklist value is selected.

Q51 What is the use of IsBlank(expression) function?

Ans: ISBLANK determines if an expression has a value and returns TRUE if it does not. If it contains a value, this function returns FALSE.

Q52 At what time formula fields values are calculated?

Ans: When we are required to calculate something in our data and pick values from related data between we can use formula field.

Q53 What is a Process builder?

Ans: The Process Builder tool allows you to easily automate business processes using a convenient graphical representation of your process as you build it. Automated processes in the Process Builder consist of:

- Criteria that determine when to execute action groups
- Immediate and scheduled actions to execute when those criteria are met

Any change that causes a record to match the criteria automatically triggers the action group.

Q54 What is the difference between Workflow rules and a Process Builder?

Ans: Workflow is able to update some fields, Process Builder is capable of updating any field that has any related record. In Workflow, if you put multiple actions on criteria, there is no way to predict or control which action will happen first.

Q55 What is a Custom Notification?

Ans: Custom Notification is customized notification where admin can add recipients, subject and content. 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.

Q56 What is Invocable Process?

Ans: Invocable processes let you modularize sections of your processes and add more logic to them. An invocable process is process that starts when another process invokes it. Whether a process is invocable or not is controlled by The process starts when in the process's properties.

Q57. What is Inbound message and Quip in Process?

Ans: Inbound Email Service: When we get an email from the external system to Salesforce, the apex class will process the emails, attachments & perform the requested operation.

Quip is a collaboration tool with built-in office suite functionality, including word processing, spreadsheet and presentation software. As a standalone product, it enables teams to collaborate around a rich set of documents. Quip for Salesforce is embedding that kind of functionality at the platform level.

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Q58 What is Data Security?

Ans: Choosing the data set each user or group of users can see is one of the key decisions that affects the security of your Salesforce org or app. Once you've designed and implemented your data model, give some thought to the kinds of things your users are doing and the data they need to do it.

Q59 How security is implemented in salesforce?

Ans: The salesforce platform makes it easy to specify which users can view, create, edit, or delete any record or field in the app. You can control access to your whole org, a specific object, a specific field, or even an individual record. By combining security controls at different levels, you can provide just the right level of data access to thousands of users without having to specify permissions for each user individually. Q3. What are the different levels of security?

Q60. What are the different levels of security?

Ans: Organization

Object

Field

Record

Q61. What is Organization Level Security?

Ans: For your whole org, you can maintain a list of authorized users, set password policies, and limit logins to certain hours and locations.

Q62. What is Object level security? And how is it implemented?

Ans: Access to object-level data is the simplest thing to control. By setting permissions on a particular type of object, you can prevent a group of users from creating, viewing, editing, or deleting any records of that object. For example, you can use object permissions to ensure that interviewers can view positions and job applications but not edit or delete them.

Q63. What is a Profile? How many types of Profile in Salesforce?

Ans: 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.

• The settings in a user’s profile determine whether she can see a particular app, tab, field, or record type.

• The permissions in a user’s profile determine whether she can create or edit records of a given type, run reports, and customize the app.

Q63. What is the difference between Profile and Permission sets?

Ans: Profile's are like global, and permission sets are local.

When we assign a profile to a user, whatever securities we defined in that profile are assigned to that user and many users too who are having assigned to this profile.

comes to permission sets these will give more flexibility, means if one user among them need more security or accessibility, we define a permission set and assign it to the particular user, this work's with appropriate user only.

Q64. Can a user be associated with 2 profiles?

Ans: No, a user can be associated with only one profile.

Q65. Can a single profile be assigned to users?

Ans: Yes

Q66. What is field level security?

Ans: You can restrict access to certain fields, even if a user has access to the object. For example, you can make the salary field in a position object invisible to interviewers but visible to hiring managers and recruiters.

Q67. Can we delete a user from the organization?

Ans: No, we can deactivate and freeze a user.

Q68. What is the difference between freeze and activate user in salesforce?

Ans: Freezing a user in Salesforce means that only stops the user from being able to login.

Deactivating a user in Salesforce means that user will not be deleted from the system but will no longer be able to log in to Salesforce and their records can be transferred to another user. They cannot be part of workflows or part of any automated processes.

Q69. What is Record level security?

Ans: You can allow particular users to view an object, but then restrict the individual object records they're allowed to see. For example, an interviewer can see and edit her own reviews, but not the reviews of other interviewers.

Q70. What are the ways of Record level security?

Ans: You can manage record-level access in these four ways.

• Organization-wide defaults

• Role hierarchies

• Sharing rules

• Manual sharing

Q71. What is OWD? What all access levels are in OWD?

Ans: Organization-wide defaults specify the default level of access users have to each other's' records. You use org-wide sharing settings to lock down your data to the most

restrictive level, and then use the other record-level security and sharing tools to selectively give access to other users.

Access levels are Private, Public Read Only, Public Read/Write.

Q72. What is the difference between Public read only and private OWD access level?

Ans: Public Read Only

All users can view and report on records, but only the owner, and users above that role in the hierarchy, can edit them.

Private

Only the record owner, and users above that role in the hierarchy, can view, edit, and report on those records.

Q73. What is controlled by the parent access level?

Ans: Assume A1 is Master object and B1 is child object in a master detail relationship. OWD for A1 is private & OWD for B1 is controlled by parent & user has edit access on A1(custom object). So, if user shares A1 records with access level=Read/write, then other users can will be able to edit B1 records

Q74. What is the difference between role and profile?

Ans: profile - profile is basically an 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.

Q75. What is the Governor limit of sharing rules?

Ans: You can define up to 300 total sharing rules for each object

Q76. What is the sharing rule?Types of manual sharing?

Ans: Sharing rules are automatic exceptions to organization-wide defaults for particular

groups of users, so they can get to records they don't own or can't normally see.

Sharing rules, like role hierarchies, are only used to give additional users access to

records. They can't be stricter than your organization-wide default settings.

Only these 4 users can share the record:

• Record Owner

• A user in a role above the owner in the role hierarchy.

• Users granted "Full Access" to record.

• Administrator

Q77. What is a public group?

Ans: Public groups is to assign things or resources to it which are meant to be seen or used by everyone in the organization. Making a data or resource to everybody in an organization may be cumbersome and time consuming but by assigning it to a public group it can be done with 1 click.

Q78. If the Owd access level of the account is set to private then what will be the default access level of opportunity?

Ans: Private

Q79 What is Data Management?

Ans: Salesforce provides data utilities that are available for the import and export of data to and from Salesforce. Looking at the available Salesforce supported facilities to import and export data.

Q80 What are the tools for data management?

Ans: Data Import Wizard, Data loader.

Q81 What is a Data Import Wizard?

Ans: The Data Import Wizard opens in a full browser window and provides a unified interface that lets you import data for a number of standard Salesforce objects, including Account, Contact, Lead, Custom Object, and Solution.

Q82 How many records can be imported using the Data Import Wizard?

Ans: Below 50000

Q83 What standard objects are supported by Data Import Wizard?

Ans: 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**.

Q84 What is a Data Export Wizard/Monthly Export Service?

Ans: Also known as Data Export Service, this is a native Salesforce functionality that allows you to perform manual or scheduled exports of your data on a weekly or monthly basis.

Q85 Till how many hours the download link for the export file is active?

Ans: 72 hours.

Q86 What is a Data Loader?

Ans: The Data Loader is a client application from Salesforce for bulk import or export of data. When importing data, the Data Loader loads data from CSV files or from a database connection, and the exporting of data is done using CSV files.

Q87 What is an External Id? What all types of fields can be made as an external id?(text,email,number fields)

Ans: 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.

External ID fields must be Custom text, number or email fields. External ID fields contain record IDs from systems outside Salesforce. You can use the upsert call to match against External ID fields during import or integration.

Q88 What is the difference between a Data Import Wizard and Data Loader?

Ans:

Data Import Wizard	Data Loader
For simple imports of data	For complex imports of data
It can load up to 50,000 records.	It can load up to 5,00,000 records.
It supports all the custom objects and only a few standard objects like Account, Contact, Campaign members, person accounts, Leads, and Solution.	It supports all custom and standard objects.
It supports schedule export.	It doesn't support scheduled export.
Delete operation is not available.	Delete operation is available.
Cannot import cases and opportunity.	Can import cases, events, tasks, and opportunities
While importing, duplicates can be ignored.	While importing, duplicates cannot be ignored.
It doesn't require installation.	It requires installation.

Q89 What is the difference between Export and Export All?

Ans: Export: It is used to export the Salesforce Data(excluding recycle bin's data) into your local system.

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

Q90 What is Hard Delete?

Ans: A Salesforce Bulk Delete or Bulk Hard Delete activity deletes a large number of existing records in a Salesforce endpoint and is intended to be used as a target to consume data in an operation.

Q91 If I want to import 30000 lead records, which tool can be used?

Ans: Data import wizard.

Q92 If I want to import 49000 user records, which tool can be used?

Ans: Data import wizard.

Q93 If I want to import 100000 records for contacts then which tool can be used?

Ans: Data loader

Q94 What is a Report?

Ans: These are the key building blocks for analytics in Salesforce CRM, where a resulting set of records is displayed in rows and columns to match the specified criteria. Report results can be further filtered and grouped and can also be displayed as graphical summaries.

Q95 What are the Types/format of Report?

Ans: There are four report formats are available in Salesforce CRM: Tabular, Summary, Matrix, and Joined.

Q96 What is a Tabular Report?

Ans: Tabular reports are the easiest and quickest way to report data. They can be linked to a spreadsheet, where they comprise a set of records listed in rows and fields (ordered in columns). Tabular reports are most suited for creating lists of records or a list with a single grand total, as they cannot be used to group data.

Q97 What is a Summary Report?

Ans: Summary reports are similar to tabular reports, except that they allow the grouping of rows of data. They can be used for reports to show subtotals based on the value of a field. Summary reports with no groupings are simply displayed as tabular reports.

Q98 What is a Matrix Report?

Ans: Matrix reports are similar to summary reports, but they also allow the grouping and summarization of data by both rows and columns and can be used to compare related totals. Matrix reports are useful for summarizing large amounts of data to compare values in several different fields or to analyze data by date or by product, person, region, and so on.

Q99 What is a Joined Report?

Ans: Joined reports are reports that can store and group multiple reports together and allow you to build a single report that contains data from multiple report types. A joined report can have up to five report blocks that can be added from either standard or custom report types, but can only be included if they share a common object relationship. For example, if you have a joined report that contains the Opportunities report type, you can then add the Contacts report type as both Opportunity and Contact objects have a relationship with the Accounts object. For joined reports with multiple report types, any field that is shared by all report types is known as a common field. Common fields appear in the Common Fields area in the Fields pane and can be used to group together the separate report blocks.

Q100 What is a Report Type? And what is custom report type?

Ans: 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. Reports display only records that meet the criteria defined in the report type.

Custom report types give you access to custom objects in Salesforce, or custom views of standard objects (like Opportunities), which your administrator configures.

Q101 What is a Bucket Field in reports?

Ans: The Bucket Field in Salesforce is a valuable feature that allows you to rapidly categorize values for a field in a report without having to create a custom formula field at the object level. In reporting, a bucket is a custom category that you create. Bucketing is a Salesforce report and documentation tool.

Q102 What is Conditional Formatting in reports?

Ans: Conditional formatting on Salesforce reports enables you to highlight cells in colors, to add extra emphasis to the key metrics.

Q103 What is a Dashboard? How many components can be there on a dashboard?

Ans: Dashboards are visual information snapshots that are generated from the data in associated reports and are presented as graphical elements. These graphical elements are known as dashboard components, of which there are these five types:

• charts,

• gauges,

• tables,

• metrics,

• Visualforce pages.

There can be 10 components dashboard.

Q104 What is Dynamic Dashboard?

Ans: 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.

Q105 How security is implemented in Reports and Dashboards?

Ans: We can implement security in salesforce using profile and permission sets by allowing and restricting them to 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.

Q106 How many blocks can be added in Joined reports?

Ans: 5