Exam.15 Summary Need to Remember

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OBJECTIVES

- Salesforce Fundamentals
- Data Modeling And Management
- Security
- Business Logic And Process Automation
- Social Features
- User Interface
- Reporting
- Mobile
- App Development

Of course, the above topics are broad. For example, Data Modeling & Management includes Standard & Custom objects, External objects, Fields of all types (summary, rollup, formula), Record Types, Page layouts etc.

Here in this blog post, I try to explain everything about each of these topics in detail with some sample questions as well.

Every single pointer I mentioned below is very important and could be a separate question in itself in the certification.

Example: For Social Account topic, one of the points I mentioned “Facebook, Klout, and Twitter are the available social accounts.” So in your certification, the question could be:

Which of these is an available social account (choose 3):

1. *Facebook*
2. *LinkedIn*
3. *Klout*
4. *Twitter*

TOPIC-WISE: QUESTIONS & EXPLANATION

Social Accounts

- You need a personal social account in order to see social account data
- You don’t need a “named principal” to establish a connection to social account
- In order to see social information about Accounts and Contacts, the user needs to be

logged into their account

- Social Information is imported into Accounts and Contacts after selecting a profile from a search in one or more Social Networks
- Social Information is NOT automatically imported into Accounts and Contacts
- Facebook, Twitter, Youtube, and Klout are the available social accounts.
- LinkedIn is NOT available

External Data Object

- You need to use "validate and sync" to include the data in Salesforce
- You need to choose "include in Salesforce searches" option to make it searchable but before that, it needs to be included using the "validate and sync"
- Relationships that can be defined with External Objects:
- External Lookup
- Indirect Lookup

Person Accounts

- Uses space in both account and contacts objects
- Can only be merged with other person accounts
- Are NOT enabled by default
- Do NOT have the same icon as Business accounts

Roll up Summary Fields

- To create one, you need Master-Detail Relationship
- Once created, you cannot change the detail object selected or delete any field referenced in your roll-up summary definition.
- Because roll-up summary fields are not displayed on edit pages, you can use them in validation rules.
- Validation errors can display when saving either the detail or master record.
- Automatically derived fields, such as current date or the current user, are NOT allowed in a roll-up summary field.

Text Fields

- Data type: Text or Phone or Number can be used to store Area Code.
- Data type: Email & Multi-Picklists cannot be used to store Area Code if you want it to be searchable.

Paragraph Fields

- To display text as paragraphs (multiple), use these 2 field types
- Text Area (Long)
- Text Area (Rich)

Record Types

- Record types can be used to define picklist values available for a given field
- The ability to create records of a specific record type is determined by the profile
- Users CAN view records assigned to a record type even if their profile does not have access to record type.
- Record types can be assigned to multiple profiles at a time

Picklist fields & Record Types Relation

- To display different picklist values for different profiles, use record types.
- Adding picklist values to Master automatically adds to all Record Types.
- Adding a Picklist Value to Lead Status, Opportunity Stage requires that you add it to the desired Record Type
- Removing a Picklist Value from a Record Type will remove that value as an option on the Picklist. Any existing Data with that value will NOT have the value removed
- Removing a Picklist Value from Master automatically will NOT remove the picklist value from any Record Types that have the value assigned

Unmanaged Package

- Components of unmanaged packages can be edited
- Tests are executed during deployment

AppExchange Apps

- To install and uninstall packages, you need Download AppExchange Packages permission

Case Assignment Rules

- NOT possible to have multiple active assignment rules.
- Cases may be assigned to Queues
- Cases cannot be assigned to Public Groups
- Use assignment rules instead of workflow rules for case assignment.
- You can have more than one entry per Assignment Rule
- You cannot have more than 1 active rule
- You do NOT need to have Case Teams configured prior to activating Case Assignment Rules

Field Data Type Conversion

- Data can be lost when converting from simple picklist to multi picklist if records contain values that are not in the picklist definition. Those values are deleted from the records on data type change. But if no conditions are mentioned, no data is lost when picklist is changed to multi-select picklist.
- Information can be lost when converting from text area (rich) to text area (long)
- Information can be lost when converting from text area (long) to text area

- You cannot convert a Custom Field to a Formula Field
- Do read about the other data type conversion effects on data.

Sandbox Refresh

- Full Copy Sandbox: Can be refreshed once every 29 Days
- Partial copy sandbox: Can be refreshed once every 5 days
- Developer Pro Sandbox: Can be refreshed every 1 day
- Developer Sandbox: Can be refreshed every 1 day

Sandbox Storage

- Full Copy Sandbox:
- Data storage: Same as your production org
- File storage: Same as your production org
- Partial copy sandbox:
- Data storage: 5 GB
- File storage: 5 GB
- Developer Pro Sandbox
- Data storage: 1 GB
- File storage: 1 GB
- Developer Sandbox:
- Data storage: 200 MB
- File storage: 200 MB

Hide fields on Page Layout

- To hide fields on page layout for few users, use a combination of Record Type & Page Layouts. Assign the record types to different Profiles.

Salesforce1 Mobile App

- The following can be included in the mobile app
- Lightening Component
- Tab
- Action
- To make a VF visible in Salesforce1, check the Tabs and Menu.

Data Model Tools

- Schema Builder and Force.com IDE tools can be used to create a data model.
- Force.com Metadata API can be used to create a data model

API

- These APIs cannot be used to create the data model
- Force.com API
- Force.com Single Sign-on API

- AJAX Toolkit for Force.com

Build with the Lightning App Builder

- At-a-glance, dashboard-style apps.
- Apps optimized for a particular task.
- Simple, single-page apps with drill-down capability.

Actions on a Lightning Page

- Send an email,
- create a task, and
- create or update records.

Lightning App Components

- Standard Lightning component
- Custom lightning component
- Visualforce

Standard Lightning Components

- List View
- Rich Text
- Visualforce Page

Create Global actions to let users create these kinds of records

- Account
- Campaign
- Case
- Contact
- Contract
- Custom objects
- Event (without invitees)
- Group
- Lead
- Opportunity
- Task
- Question

Deployment

- You can migrate Metadata to Two Different Production Orgs using these options
- Force.com IDE
- Force.com Migration Tool
- Unmanaged Packages
- Change Sets (only for Sandbox to Production or Sandbox to Sandbox)

Chatter Actions

- Only these standard Chatter actions appear on the user profile page, regardless of the actions in the User page layout
- Post
- File
- Link
- Poll

Re-evaluated Workflows Fire:

- Previously fired workflow rules
- Criteria-based sharing rules
- Active Escalation rules

SAMPLE QUESTIONS FORMAT

Q: Which automation process to use to receive a notification when a new case is open with the status of “New”

- Process Builder
- Escalation rules

Q: System Administrator is unable to change Master Detail field to lookup field. Why?

- The Account record includes roll-up summary fields

Q: Contact’s mailing postal code should match the associated account’s shipping postal code

- Create a validation rule using a Not Equal operator

Q: The support team would like to be able to collect information from a customer using a series of question prompts. What could be used to accomplish this?

- Visual Flows

Q: Update a field on an Account when an Opportunity Stage is changed to closed

- Lightning Process Builder
- Workflow Rule

Q: Which objects can be members of a Campaign?

- Lead
- Contact

Q: Where can a Lightning Component be utilized?

- Salesforce1 Mobile App
- Standalone Lightning App
- Lightning Page

Q: What happens when a new full sandbox is created

- Default email deliverability is set to system email only
- Usernames will be modified uniquely for that sandbox
- User’s email addresses will be modified

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