**Tell me about yourself**:

I am Pavani from Tenali Andhra Pradesh. I am working at CEPTES software Private Limited as Software engineer from April 2016. I am having 3.5 yrs of experience in Salesforce testing.

I am currently working for AV ECHO which is in hyper care. My day to day responsibilities are

* Analyze requirements. Develop, review and execute the Test cases based on the requirements.
* Performing Functional, Negative, Positive, Sanity, Regression & validation testing.
* Based on the requirement changes needs update the test cases
* application testing in various browsers environments including Developer Edition, Production environment to check compatibility.
* Creating OQs and PQs .
* Scripted Unit test cases, performed Dry run manually and in ALM.
* Involved in client meetings, SMEs to know the requirement and to deliver the quality product.
* role-based testing

**Tell me about your project?**

**AV ECHO explain about complaint management system.**

**Client is Abbott. As Abbott works in health care industry, it deals with handling of complaints related to medical devices. In the current system to initiate and close the complaint there is an involvement of four systems. Recon, Viper, EMDR and DCTM systems. Instead of maintaining all these databases there is an opportunity to adopt common complaint management platform for echo. So current requirement is to replace the current complaint management system with trackwise digital a software based on salesforce.com platform.**

**dev:**

**coming to configuration I have experience in creating objects,fields,validation rules, workfoles, giving security using profiles, permission sets and security controls. coming to customization I have experience in writing triggers,apex classes,vf pages, batch apex and scheduling apex. coming to deployment skills I have experience in change sets, ant migration tool, Aside.io**

Difference between normal testing and salesforce testing?

Architecture of salesforce:

Multitenant architecture

Model view controller MVC architecture

Model::

Standard objs and custom objs

View: vf pages and components

Controllers : The business logic is implemented in controller

Types of clouds:

Salesforce offers a variety of services and tools, each targeted at a specific function or market. These tools are called “clouds,” because they’re all served via cloud computing.

6 major clouds1;

Sales cloud

Service cloud

Marketing cloud

Commerce cloud

Experience cloud

Analytics cloud

and community cloud

**Cloud computing** is a concept of accessing infrastructure or platform or software as service over the internet by paying for use.

Three types of services with the cloud:

**Infrastructure as a service**: concept of accessing infrastructure such as storage server or app servers over the internet.

**Platform as a service**: concept of accessing platform or environment which is required to build new applications or to enhance existing applications on the cloud.

**Software as a service**: concept of accessing the software applications over the internet.

Salesforce.com & Force .com: both are relatively same but salesforce.com is used to build crm functionality as per the application where as Force.com is used to customize our data model, business logic and user interface

What are salesforce products?

Force.com: is a cloud platform to automate and extend the business by developing the app

Data.com: this will maintain information about all the corporate orgs in the world

Site.com: this is used to build, design and publish social and enterprise websites on the cloud

Database.com: this will provide database service on the cloud

Chatter.com: private and secured network chatter messenger for your org internal and external communication

App exchange:it is a directory where we can get all the salesforce applications which are build on the salesforce cloud.

Environment is an instance of force.com platform and is also called as org.

Production environment: it stores live data that is actively use to run your business. Production has active paying users who can have access to your critical data

Sandbox(Developer and testing environments):: Sandbox is identical copy of production which is useful for development testing and Training environments.

WE have 4 types of sandboxes:

**Developer sandbox:** This sandboxes are designed per individual user development. This sandbox is a copy of productions metadata(Meta data is nothing but complete structure and schema of your application).

Data storage: 200mb; File storage: 200mb

Refresh interval: 1 day

Developer pro sandbox: This sandbox provides same functionality as developer sandbox with data and file storage. Data storage: 1GB; File storage: 1GB

Refresh interval: 1 day

Partial Copy sandbox: This sandbox is designed for testing environment. This sandbox is a copy of productions metadata with sample data of 10,000 records per object.

Partial copy is also known as UAT environment.

Data storage: 5GB; File storage: 5GB

Refresh interval: 5 days

Actions: All types of testing except performance and load testing

Full copy sandbox: Exact copy of productions metadata and data. Full copy sandbox is also known as staging environment.

Refresh interval: 29 days

Data storage : Exact size of production; File storage: Exact size of production

Actions: All types of testing including performance and load testing

What is Metadata?

Meta data is nothing but complete structure and schema of your application.

Editions: edition is going to tell you what set of features are provided by salesforce to your environment

* Unlimited
* Developer
* Professional
* Enterprise
* Group
* Contact Manager
* Personal

If you want to make development using apex programming or visual force pages then minimum we need to purchase enterprise edition.

Licence: License in the salesforce determines the baseline of the features that users can access or perform on his org.

**Salesforce licence:** all the users in the org who have purchased to salesforce license they canaccess to standard CRM applications and app exchange

**Salesforce platform licence:** Access to custom application and app exchange

**Knowledge only user:** user who need only salesforce knowledge app

**Work.com only user:** user who need access to work.com app.

**Chatter license only:** this license is renamed as chatter plus licence. This license is **designed** for those users who does not have access on salesforce license but need access to the objects

**Chatter external:** this license is designed for user who are outside of your organization email domain

C**ompany profile:** This will maintain company’s basic information like timezone, currency, local language etc.,

Salesforce by default does not support multiple currency if we need multiple currency we have to raise a case for that. Multi-currency cannot be disabled once enabled. Default currency what we specifies is corporate currency.

Fields in Opportunity:

Opportunity Name

Account Name

Closed date

Stage picklist: closed won, closed lost, prospect

Lead source picklist: Employee referel, web, email

Fields in lead:

Last name

Lead status: open, contacted. Qualified, unqualified, demo done in conversation, demo done in response

Lead source, emp referral, web, email, other,

Email

Title,

Company,

Rating hot warm, cold

Address details.

**Role:** Roles in the org specifies the structure and hierarchy of your organization. It will specify to whom we have to report. Users at any given level can view edit and report on all data owned by or shared with users below them in the role hierarchy.

If you disable the Grant access using hierarchy at sharing settings then the superiors can not be able to see the records. only record owner and the users granted access by the OWD can have access to the records.

Roles can be created directly in the production. We can deploy roles from sandbox to production by using change set.

**Profile:** A profile is a collection of settings and permissions that determine which data and features in the platform user have access to.

Means It controls what user is allowed to see and in the org. Every user is assigned to profile and that profile defines what user can see and do in the org.

Profile controls : page layouts, app permissions, tab settings, object permissions, record types, apex classes, visual force pages, Login hours and IP ranges. Every custom profile is a copy of any one of the existing profile.

Difference between role and profile?

**Roles** controls which records/objects a user can see based on their **role in the** hierarchy. Defining profile for a user is mandatory, role is not. Profile defines what a user can do within the org.

Login hours: we can define buisiness hours during which user can log into his account. This can be set at profile level or org level.If user can report any issue related to login this can be resolved by looking into login history.

IP ranges: We can set range of IP addresses from which user can log into his account. These restrictions can set at profile level or org level.

If account is logged out due to n number of invalid attempts then administrator can reset the password or unlock the password.

**User:** These are people who can access your application. Without giving profile and licence we can not create a new user. If user has different timezone or different local language then user time zone and local language will overrides with org time zone. We can not deploy users to production we have to create directly in production.

**Documents:** If you want to store images or files or pdfs in the salesforce from the external system we can store them in documents object.

Internal document: If the document is internal doc then contents of that document is not visible to external users.

External Document: If you indicate doc as external then the content of this doc is visible both internal and external users.

We can not deploy documents which are in my personal document folder into production.

Static resource: we can use to upload the files you can reference in a **Visualforce** page, including archives (such as .zip and .jar files), images, style sheets, JavaScript, and other files.

App Launcher :

Scenarios on record types

**App:** App is a collection of tabs which are designed to work as a single function.

Two types of apps:

Standard: Created by Salesforce to support global CRM requirements.

Custom: created by users to meet their business requirements.

What are the limitations imposed on the logo of the app?

Logo should be more than 3kb and less than 20kB.

Objects are nothing but tables in the regular database. Entire data in the salesforce is stored in the Objects.

Two types of objects:

Standard: These are the objects which are created by salesforce to meet the global requirements

Custom: these are the object which are created by user to meet their business requirements

**Tab:** Tab is the Interface between user and the application. There are 4 types of tabs:

1. Custom object tab
2. Visual force page tab
3. Web tab
4. Flexible page tab

4a. Lightning page tab

We can deploy tabs from sandbox to production with the corresponding objects.

Default on:

If you give default on permission for a profile on a tab, all the users with this profile will be able to access the tab and it will display in the tab panel.

Default off: If you give default off permission for a profile on a tab, all the users with this profile will be able to access the tab but it is not visible in the tab panel.

Tab hidden: If you give Tab hidden permission for a profile on a tab, all the users with this profile they can not view this tab.

**Fields** : Fields are nothing but columns in the regular database table.

1. System Fields: These fields are created and values are updated by the salesforce when ever the operation occurs

* Id: when ever new record is created salesforce internally creates 18 character id which is unique id to the entire database. 1st three characters in the id represents object and last 4 characters represent record
* Is deleted
* Created by ID
* Last modified by Id
* Last modified date
* System mod stamp sote the date and time if the record updated manually or automatically.

1. Standard Fields: Owner, name/autonumber, last modified by, created by. Standard object fields are also called as standard fields
2. Custom Fields

Page layouts: Name certain things which can be customized on a page layout?

<https://trailhead.salesforce.com/content/learn/modules/lex_customization/lex_customization_page_layouts>

The page layout editor lets you:

Control which fields, lists of related records, and custom links users see

Customize the order that the fields appear in the page details

Determine whether fields are visible, read only, or required

Control which standard and custom buttons appear on records and related lists

Control which quick actions appear on the page

Why relation ships?

For data redundance(when the same piece of data is stored in two or more separate places or repetition of same data ) and data inconsistancy

Whenever there is a repetation of similar data then it’s the time to create the data in different tables and link it

Relation ship:

Master detail: one to many relationships. It is required field. This Field can be created only on the object which doesn’t have any data. Master detail field can be created only custom object. If we delete parent automatically child also get deleted. When you undelete the parent record corresponding child records also get undeleted

Lookup: It is one to many relation ship This can be created on the object which is having data(records) or which doesn’t have records. It is an optional field. Child and parents can have its own owners. If you delete parent child does not deleted. Parent and child has their own owners. Lookup field we can create on standard obj or custom object.

Difference between Master and lookup?

Master

1. Cascade record deletion

2. Child record must have a parent

3. Cascade record level security

4. Standard Object can not be on detail side of Master Detail

5. Roll-up summary fields on parent object

6. Master Detail relationship field is required on the page layout of the detail record

Lookup

1. This is optional, no parent requirement

2. No impact on record security

3. Roll-up summary fields cannot be established

4. Lookup relationship is not automatically required

Junction object(Many to Many): Any custom object with two master detail fields is called Junction object. 1st master detail what we have created is called primary master and second master detail field is called secondary master. When we deleted primary automatically secondary become primary.

Junction object can not be parent to other object. Junction object is always custom object. If any parent has more than 200 child then that parent can not be deleted. On the junction object

Ex:Multiple students in multiple cultural activity grps

Hierarchial Relationship: It is one-one relationship. This is created only on user object to establish relationship between user to user.

Lightning doesnt support render as pdf.

How to create master detail field on an object which is already having data?

Create the lookup field with the same parent. For every child record assign some values from parent object using lookup. Convert lookup to master detailed.

What will happen when you undelete the master detailed field from the recycle bin.

master detailed will be converted to lookup

How to convert master detail field to lookup field?

Check if there are any rollup summary field defined using master detail field. If any rollup summary fields are defined delete them then then convert master detail to lookup.ww5

Rollup summary field: Read only field that display sum, min or max value of the field in related list on the record count of all record listed in a related list. Rollup summary field can be created only on master object using master detailed relationship. It is used to count sum max, min count values of the child records.

Global data:

Data which remains constant through out the application we call it as global data. Global data is preferred with dollar sign $organisation $ Profile.6

Page layout: By using page layout we can specify the order of the fields, which buttons needs to be displayed, corresponding related list needs to be displayed. Page layouts also help us to control the visibility and editability of the fields. We can set field as read only.

Levels of data access in salesforce:

Salesforce security:

4 levels of security:

1. Organisation level security or system level security
2. Object level security
3. Field level security
4. Record level security.

Organisation level security or system level security:

System Level Security in Salesforce is basically various security controls that we have to login into Salesforce Application.

1. Authentication.
2. Authorization.
3. Social Sign On.

For your whole org you can maintain a list of authorized users, set password policies and limits logins to certain hours and locations by using IP ranges.

1. Managing password policies:
2. Restricting the login based on the locations by using Ip ranges: IP ranges we can set through organisation level and profile level

Difference between Setting IP ranges on Organisation level and profile level?

1. If you set IP ranges on Organisation level then user tried to login out side of that IP range then they will face login challenge they will get OTP to their mobile number or email id then they can be able to access.
2. If you set IP ranges on Profile level then user cannot be able to login at all outside IP range. Before ip restricting the users make sure ur ISP is provided your static IP other wise as an administrator you can not also access the salesforce org.
3. Restricting the login based by time: restrict the access according to the time also.
4. Restricting the users email domain

Object Level security:

Prevent user or group of users from creating, viewing, editing and deleting the records of an object by setting permissions on that object.

There are two ways of setting object permissions.

1. Profiles 2. Permission sets

Profiles: collections of settings (what user can see) and permissions(will set that what user will be able to do in salesforce) that determine which data and features in the platform user have access to.

Every user is assigned to profile and that profile defines what user can see and do in the org.

Profile controls Object Permissions, Field permissions, User permissions, Tab settings, App settings, Apex classes, Visual force pages, Login IP ranges, Login hours, record types.

Two types of profiles.

Standard profile and custom profile.

Standard Profiles: Standard Profiles are the profiles which come by default with salesforce

**Readonly:** Can only view the records.

**Standard user:** Can view, edit and delete their own records.

**Marketing user:** standard user permissions plus can import leads for the org

**Contract manager:** standard user permissions plus can edit, approve, activate, delete contracts

**Solution manager:** standard user permissions plus can manage published solutions plus can manage solution categories

**System administrator:** Super user can customize everything in the application. (View all data and Modify all Data)

Difference between View all modify all and View all data and Modify all Data?

View All Permission on Object will give you "View Access to All records of the Object"

View All Data will give you permission to all records in the system across all objects.

**Modify All Data**: Create, edit, and delete **all** organization **data**, regardless of sharing settings. **Modify All**: Give Read, Add, Delete permission to selected Object, Create permission is not included in **Modify All** permission

Custom Profile:

Object permissions on standard profile cannot be edited. That’s the reason we can create custom profiles by cloning the standard profile.

Important points to remember on profiles:

* Every profile should have atleast one visible app.
* If an app is visible and its tab won’t show unless the profile has permission to view the objects.
* A profile can be assign to many users but a user can be assigned to only one profile at a time.
* View all and Modify all are not available for Ideas, pricebooks, article types and products.

Who can see what object permissions do profiles have and who can edit the object permissions on different profiles.

* To view object permissions user should have access to “View setup and configure”
* To Edit object permissions user should have access to “Manage Profiles and permission sets” and “Customize applications”.

Permission sets:

Also collections of settings and permissions that determine which data and features in the platform user have access to.

But these are used to extend the access or grant additional access to users without modifying the existing profile.

Permission sets are additive which means we can not remove a users existing permissions which they have through their profile by assigning a permission set with less access. We can only add permissions

Important points to remember on Permission sets:

* A user can be assigned to a multiple permission sets.
* In permission sets we cannot control page layout assignments.

Difference between profiles and permission sets?

1. Profile has most restrictive settings and permissions a user assigned to this profile should have. Where as Permission sets extend the access settings and permissions provided by the profile
2. A user can only one profile assigned. Users can have more than one permission set.
3. Profiles are restrictive. permissions sets are additive
4. Every user must be assigned to Profile. It is not necessary for every user to have a permission set.

Field Level security:

* Field level security controls whether a user can see or edit the value for a particular field on an object.
* It secures the visibility of fields in any part of the app includes related list, list views, reports and search results which cannot be secured through page layouts.

Note: By using page layouts also we can control the visibility and edit access of the field. But it cannot control the fields value in list view, related list, reports by using page layout. We can control by using field level security.

Field level security can be controlled in two levels. Profiles and permission sets.

Record Level Security:

Who can create, edit, delete the record of particular object. Or

Record access determines which individual records users can view and edit in each object they have access to in their profile.

Access levels in record level security. Public read/write, Public read only , private.

Record level security can be implemented by using 4 ways or You can manage record-level access in these four ways.

OWD: Determine the baseline level of access for all records of an object. It should be most restrictive in record level security because other record level security implementations only grant additional access they can not restrict the access

Role hierarchy: Managers will always have access to the records of his/her subordinates

Sharing rules: Automatic exceptions to the OWD settings and the users who does not own the record. Should be created only for objects whose OWD is set to public read only or private because sharing rules can only extend the access they can not restrict the access.

Types of sharing rules:

Owner based sharing rules:

Criteria based sharing rule: we can create upto 50 criteria based sharing rules per object.

Manual sharing: sharing records individually with other users using share button on the record.

When to use manual sharing?

When it is not possible to define a consistent group of users who need access.

Who can share the record manually?

* Records owner.
* A user in a role above the owner in the role hierarchy
* User granted full access to the records.
* Administrators

We can share with users, roles and subordinates, public groups.

IF owd is public read only and private then only sharing button will be available in the object.

Sharing button is not available yet in lightning experience we have to share from salesforce classic.

Sales cloud: Sales cloud refers to sales module. It includes Campaigns, Leads, Accounts, Contacts, Contracts, Opportunities, Products, Price books, Quotes. It includes features such as Web-to-lead to support online lead capture, with auto-response rules. It is designed to be a start-to-end setup for the entire sales process;

Campaign: object is basically used to store the information of campaigns that you do for marketing of your business or to generate new leads or to do some brand building.

marketing stuff or marketing campaigns that you do for marketing of your business or to generate new leads.

Lead: is used to store the info of a potential customer who wants to buy your product. He is not yet customer.

If he is already a previous customer then you can store his info on account.

Account: we store the info of our customers basically prospects to whom we are working to do deal to close something. An obj we can store the info of prospects.

Contact: where you can store the info of key executives. store the info of customers.

Opportunity: where you can store the info of deals that are about to happen or already happened even we have lost it or won the opportunity. Deal will be with particular amount or on different stages.

Product : Store the info of each and every products or services that you are selling. You can include those products in to an opportunity.

Price book: store the info of products with different prices to different customers.

Quote : different quotes for single product.

Contract: Deal is done then next we have to sign a contract and that details are stored in contract object.

Differences between Sales and service cloud?

Sales cloud:

* Effective Lead Management which includes Lead Assignment.
* Productive Campaign and Campaign Members Management.
* Opportunity and Product management.
* Standardized quoting and pricing capability.
* Easy access to Customer Details.

Service cloud:

Service cloud implements Salesforce Knowledge which increases the Customer Service of a business. Service cloud implementation will help business in following ways:

* Essential Case Management which includes Case Assignment and case Escalation.
* Knowledgebase capabilities which provides sharing of information.
* Feature like Ideas, Questions and Answers which enables Customer Collaboration.
* Live Chat for Customer and Support Agent Interaction

Metrics such as average number of cases per day, cases by issue, time to resolutions on a cases per customer.

Queue: Queues are used to assign records that does not have any user as owner. Users who has access to the queue are called queue members. Queue members can examine the records in the queue and claim the ownership of ones they want. Only supported for the case, leads, service contracts, orders and all the custom objects in the org. Records can be assigned to a queue by manually changing the owner field of the record or with the help of assignment rules. Queue members and users above them in the role hierarchy will always have access to the record in that queue.

Example: You might get a lot of leads from an integration, and not have time to manually assign each one to a specific Sales User.In this very common case, you'd simply assign the leads to a Queue, then add your Sales Reps as Queue Members so they can pick and choose the leads they want from this Queue!

Important points to remember:

* A single queue can have records of multiple objects which we call as supported objects
* Regardless of the sharing model users must have edit permission to take the ownership of the record in queues of which are already a member.
* Admin users with modify all object level permission for the respected object and users with Modify all data permission can view and take ownership of records from any queue regardless of sharing model
* Queue members can be changed by Admin or person with “Managed [Object name]” like manage leads, manage cases.
* Before deleting a queue reassign its records to another owner and remove it from any assignment rules

Grant access using hierarchy: If you enable this option the users who are above you can access(read/write.delete) on all the records. This option by default enable to all the standard objects.

Public group: Consist a set of users under one name. These are created to group users who has different profiles. This can be created by the administrator only.

Where can we use public groups?

Can be used in sharing rules to share the records.

Can be used in reports and dashboards folders to give access to reports and dashboards

Sharing rules: To grant extra access on the records apart from what user is getting through OWD.

4 types of sharing rules:

Owner based sharing rule

Criteria based sharing rule

Manual sharing rule

apex based sharing rule

Object level security is always controlled from profiles.

Record level security is always controlled by OWD and sharing rules

Field level security is always controlled from page layout or profiles.

Record types: Record type allows you to provide different sets of object picklists, different page layouts and custom business processes to specific users based on their profile.

For a single object if we have 4 different record types can we assign 4 record types to 4 different profiles?

Yes we can assign 4 record types to 4 different profiles.

Validation Rules: Validation rules help improve data quality by preventing the user from saving the incorrect data. Error messages can be displayed below the field or top of the field. Multiple error msg may be displayed at one time.

Salesforce executes the validation rules only if all the data is valid then only it will save the record.For any invalid data salesforce displays the associate error message without saving the record.

Even if the fields referenced in the validation rule are not visible on the page layout the validation still apply and it will result in an error msg if rule fails.

Exa: Start date is before end date

Make fields conditionally required depending on the value of another field.

Ensure that numbers are within a specific range, such as discount is less than 30%.

Email templates: we can create 4 types of email templates:

Text: All users can create or change text email templates.

HTML(HTML with letterhead): Administrators or users with “Edit HTML permissions” can create HTML email templates based on a letter head.

Custom (without using letter head): Administrators or users with Edit HTML template permissions can create custom HTMl email templates without using letter head.

Visualforce: Administrators and developers can create using visual force. Visual force email templates allow for advanced merging with the recipient data where the content of template can contain information from multiple records.

All of these email templates can include text, merge fields or attached files.

We can also include images on HTML and visual force templates.

Text and HTML templates can also be used when we send mass email.

We can not send mass email using visual force email template.

We will use text to just send lines . we use html to send an email with constant logo addressess

if we want to change the logo, images and to send a page we will use visualforce.

Workflow rules allows us to automate the business process for organization.workflows allows us to automate the following types of the actions.

Email alert: An email alert is an action that is sent to specific recipients using by email templates. The recipients may be salesforce users or others.

Task: Tasks can be assigned to users or record owners automatically when the rule criteria meets workflow tasks providing the subject, status, priority and due date. Tasks appear on the user's calendar which can be accessed by the “My tasks''section of the Home tab

Field updates: Field update is an action that will update the value of a field automatically. Workflow field updates specify the field we want to update and the new value for it.

Outbound message: Outbound message is an action that sends a secure, configurable API message (in XML format) to the external systems.

Flow:: Flow is a powerful tool that can automate any repetitive task or process. With Flow, you can collect, update, edit, and create Salesforce information, and then make those flows available to the right users or systems.

Workflow rules triggers upon saving the record

Two types of workflow:

Immediate workflows: In this kind of workflows, the workflow actions will execute immediately whenever the record meets the conditions specified in the workflow rule.

Time dependant workflows: In this kind of workflows, the actions that queue when a record matches the criteria and execute according to the triggers.

What are different workflow evaluation criteria’s and explain them?

Below are the workflow evaluation criteria’s

• When the record is created

• When the record is created and every time it’s edited

• When the record is created and any time it’s edited to subsequently meet the criteria

Difference between workflow and trigger?

Workflow is an automated process that fires an action based on Evaluation criteria and rule criteria. **Trigger is** a piece of code that executes before or after a record **is** inserted or updated.

We can access a workflow across the object. We can access the trigger across the object and related to that objects

We cannot perform DML operation on workflow . We can use 20 DML operations in one trigger.

We cannot query from database We can use 20 SOQL’s from data base in one trigger.

Workflow can work only after some action. Trigger can be used before and after some action.

Difference between process builder and workflow?

Both are the automation tools which executes whenever a record is created or edited.

Workflow has four action: send email, field update, task, outbound message, flow.

Process builder has 8 action:

Create a record

Update any related record

Use a quick action to create a record, update a record, or log a call

Launch a flow

Send an email

Post to Chatter

Submit for approval

Call apex methods

But the process builder doesn’t support outbound messages.

If you create 4 wf rules per object which one can execute first. We can not predict the order of execution through workflow rule. Using process builder we can predict.

Is it possible to edit the process once it is activated?

No, You need to clone and while cloning you can create new process or create new version.

becuase creation of records cross object reference. update related list. invoke another process builder. post in chatter. Is not possible in workflow we can go to process builder.

What should be the condition we need to specify in process builder to specify schedule actions?

Below are 2 conditions:

Only when record is created

When record is created or edited and while define criteria select the checkbox for below setting

Do you want to execute the actions only when specified changes are made to the record?

What user permission is required to create, edit and view process?

“Manage Force.com Flow” AND “View All Data” in profile.

Import wizard: For simple imports of upto 50000 records.

It supports all the custom objects and few standard objects Account, contact, lead, solutions campaign member. It supports schedule export. Delete operation is not available. It does not require installation. While importing duplicates can be ignored. Don’t have batch size.

Dataloader: It is an application for bulk import and export of data. Data loader is used to insert, update, upsert, delete or export salesforce records.

It supports all standard and custom objects. While importing duplicates cannot be ignored. Installation is required. Delete operation is available. It does not supports schedule export.

When importing **data**, **Data Loader** reads, extracts, and loads **data** from comma-separated values (CSV) files or from a database connection. When exporting **data**, it outputs CSV files.

Report types: Report types allow us to build a framework in the report builder from which user can create and customize the reports.

A Report type defines the set of records and fields available to a report based on the relationship between primary object and its related objects.

Pre-defined standard report types:

* Accounts & Contacts
* Opportunities
* Customer support(Report types regarding cases and solutions)
* Leads
* Campaigns
* Activities
* Administrative report types.
* Pricebooks, products and asset report types.

Reports: A Report returns a set of records that meets certain criteria and displays it in organized rows and columns.Report data can be filtered and grouped and displayed graphically as a chart.

Reports are stored in folders, which control who has access.

We must have read permission on the records included in reports, otherwise when we run them they may be missing data or appear blank.

Report folders: The report folders section allows us to choose the report that are stored in specific folder.

In salesforce CRM we cannot save reports to the standard report folder we can only save reports to the “My personal custom report folder”, unfiled public reports folder or any custom report folder where we have proper read write access.

What are different kind of reports in Salesforce?

Tabular - Tabular reports are similar to spread sheets, consist of ordered set of fields in columns with each matching record listed in a row. Tabular reports are best for creating list of records with single grand total. These reports can't be used in Dashboards unless the number of rows are specified.

2. Summary Reports - Summary Reports are similar to tabular reports, but also allow users to group rows of data, support sorting and view sub totals and create charts. These can be used as source reports for dashboards. **Summary reports** displays subtotals based on Value of a field.

Matrix Reports: Matrix reports are similar to summary reports but allow you to group and summarize data by both rows and columns. They can be used as the source report for dashboard components. Use this type for comparing related totals, especially if you have large amounts of data to summarize and you need to compare values in several different fields, or you want to look at data by date and by product, person, or geography. Matrix reports without at least one row and one column grouping show as summary reports on the report run page.

4. Joined Reports: Joined Reports let you to create multiple report blocks that provide different views of your data. This type of reports enable you to adopt five different blocks to display different types of related data. Each block can own unique columns, summary fields, formulas, filters and sort order. Use joined reports to group and show data from multiple report types in different views

Reports always runs on user context which means user security model is taken into account. Running user and viewing user is going to be different in the reports in salesforce. Summary and Matrix reports can be used to generate dashboards. We can add Joined reports also to the dashboard as a source report.

Dashboard: Graphical representation of reports is dashboard.

Metric and gauge components will show grand total in dashboards.

On which reports we can create dashboards?

Summary and Matrix, joined

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.

Dynamic Dashboards can be viewed as a user who has login and as a user who has created.

Dashboard which is running under current logged in user permission are known as “dynamic Dasboard”. At the most 3 dynamic dashboards can be built. Available in Unlimited, Enterprise and developer edition. This type of dashboard cannot be scheduled for refresh. IT must be scheduled manually.

How to display more than 20 components im a single dashboard?

As per governor limits we can only display 20 components on a single dashboard. If you want to display more than 20 then add additional components to the VF dashboard component and added to the dashboard as single component.

What are the operations that are performed using data loader?

Insert update, upsert, delete, hard delete, export, export all

Can we create new Profile without cloning Existing Profile?

Ans: No, We have to clone any one of the existing Profiles to create a new Profile.

Explain what is dashboard?

Dashboard is the pictorial representation of the report, and we can add up to 20 reports in a single dashboard.

SOSL:: Salesforce Object Search Language (**SOSL**) has the ability to search across multiple objects in one query. You can search text, email, and phone fields for multiple objects, including custom objects. **SOSL** statements **return** a list of lists of sObjects, where each list contains the search results for a particular sObject **type**.

Example queries:

FIND {Acme} IN ALL FIELDS RETURNING Account(Name), Contact(Name)

FIND {Prospect} IN ALL FIELDS RETURNING Opportunity(Id, Name, Amount, Account.Name WHERE StageName = 'Closed Won')

FIND {email@domain.com} IN EMAIL FIELDS RETURNING Case(Subject, Description, Contact.Name, Account.Name WHERE Status = 'New')

In which circumstances the triggers are needed?

Ans: Triggers are needed when the data need to insert/update on multiple objects in a single transactions Or when we are inserting default values to database Etc.,

Explain what is Audit trail?

Audit trail function is helpful in knowing the information or track all the recent setup changes that recent setup changes that you and other administrators have made to your organization. It can store last 18 months data.

Difference between export and export all?

Export: when you select export only the records which are available in the object are exported.

Export all: when you select export all all the reocords available in object as well as recycle bin both exported.

What happens when the lead is converted?

When the lead is converted the account contact and opportunity(optional) will be created automatically by taking the values from the lead record.

*Web-to-lead: The process of using a website form to capture visitor information and store that information as a new lead in Salesforce.*

*Web-to-****Case****:* To gather customer feedback from your company's website and customer emails. Gather customer support requests directly from your company’s website and automatically generate up to 5,000 new cases a day with Web-to-Case.

*If you exceeded the daily limit and you want to increase that limit then go to Help & Training and raise a case with salesforce.*

What is case?

A case is a customer’s question, feedback, or issue. Support agents can review cases to see how they can deliver better service. Sales reps can use cases to see how they affect the sales process. Responding to cases keeps your customers happy and enhances your brand.

What is Case management?

We can manage the cases automatically.

Case Queues: Automatically prioritize your support team’s workload by creating lists from which specific agents can jump in to solve certain types of cases.

Case Assignment Rules: Automatically assign incoming cases to specific agents so that the right people work on the right cases.

Case Auto-Response Rules: Automatically send personalized email responses to customers based on each case’s details.

Case Escalation Rules: Automatically escalate cases to the right people when the cases aren’t solved by a certain time.

Macros: Automatically complete repetitive tasks on cases, such as selecting the right email templates, so that agents can spend time doing more important things.

How many ways we can create cases?

Manually by Case object

Email to case

**What is Email-to-Case?**

Automatically create a case when an email is sent to one of your company’s email addresses, such as support@theblogreaders.com

How many ways we can create lead?

Manual creation in salesforce.

Web to lead

Lead assignment Rules:

Leads coming in from different channels like email marketing campaigns, or from social media or from websites there are sales executives who are manually creating the lead record into salesforce org. These leads should be assigned to the appropriate sales executive based on the information present on the particular record. Then we can use the lead assignment rule.

One lead assignment rule can have more than one condition based on the criteria lead will be assigned to a particular sales executive.

What happens if lead converts?

When a **Lead** is “converted” it means that the **Lead** becomes a Contact (person), Account (company), and an Opportunity (potential sale) in the **Salesforce**.com.

Managed package and unmanaged package:

Developers are not allowed to edit manage packages. Unmanaged packages can be modified or customised if there is a need.

Managed packages are developed by Salesforce.com partners to sell the applications to customers. Once the components are installed from managed packages, the components cannot be edited in the organisation they're installed.

Unmanaged packages: Unmanaged packages are used to distribute open source projects or applications to provide basic building blocks. Once the components are installed it's editable in the organisation installed.

To add to it if you install managed package in developer console the classes written as a part of the managed package would be hidden so in one word metadata customization is not possible in managed packages.

Whereas in unmanaged packages the metadata can be modified according to the needs. Simple example would be Open source code in GIT HUB

What are different types of Accounts in salesforce?

There are 2 types of Accounts in Salesforce.

1. Personal Accounts -

Associated with a single person and Person name will be taken as primary consideration

2. Business Accounts -

Company name will be taken into primary consideration

Do governor limits apply to Sandbox Instances?

Ans: Governor limits do apply to all Salesforce Instances.

How to mass delete users data in Salesforce?

Ans: User data can be mass deleted from Data Management, Mass Delete Record option.

What will happen if Account is deleted?

Ans: If the Account is deleted, then the Contact and Opportunity will also be deleted from Salesforce which are related to that Account.

When you can't add Time dependent action in Workflow rule?

Ans: We can't add a time dependent action to a rule if we choose an option of Every time a record is created or edited.

How can we provide the user login (Authentication) in public sites created by Salesforce?

Ans: We can provide the authentication on public sites using "Customer Portal"

What are the different ways of making a field mandatory?

Ans: Field can be made mandatory in 4 ways

1. In Page layout

2. While creating a field, mark it as mandatory

3. Use Validation Rule

4. Use Trigger code

Difference between Person accounts and Business accounts?

Person Account:

1. Person Account is associated with Account

2. Oriented towards doing business with person

3. Need to contact Salesforce to enable it

4. Once enabled, can't be disabled.

Business Account:

1. Business Account is associated with Account and Contacts

2. Oriented towards doing business with Companies.

What is the use of Salesforce.com sites?

Ans: Force.com enables you to create public websites and actions that are directly integrated with your Salesforce.com organization without requiring users to log in with a username and password. Any information stored in the organization can be publicly exposed through a branded URL. Sites are hosted on Force.com platform and built on visualforce pages.

What are Groups and their uses in Salesforce?

Ans: Groups are set of Users, Groups can contain individual users, other groups and users in particular roles or territory.

There are 2 types of Groups

1. Private Groups

Each users can create these groups for their personal use.

2. Public Groups

Only administrators can create public groups and can be used by everyone in the organization

The uses are:

1. Sharing rules

2. share records

3. assign specific actions in Salesforce Knowledge

What are the different Dashboard components?

1. Charts 2. Gauge 3. Metric 4. Table 5. Visualforce Page

Can we define a single workflow rule on multiple objects?

No, Every workflow must be based on a single Object

SalesForce.com is one of the most widely used Customer Relationship Management (CRM) tool

The primary purpose of a CRM tool is to sustain the relationship of an organization with its customers once the product is delivered to customers. Over the time, along with providing CRM services, SalesForce started to offer cloud storage as well, which reduced the hassle of maintaining physical servers for data storage of web applications. Also, cloud-based storage does not require a user to install any additional hardware or software for using the application. It allows organizations to reduce the development cost and build applications within a short time frame.

Benefits of using SalesForce

* Helps to maintain a positive relationship with the customers.
* Enhanced communication between customers and organizations.
* Automation of daily tasks.
* The productivity of the developers would be increased as SalesForce provides inbuilt objects to reduce the development effort.
* No additional software is required to use SalesForce.
* Developers can reuse the existing applications through the built-in SalesForce app store named App Exchange. SalesForce also allows the developers to build their own custom applications.
* Inbuilt reporting mechanism.
* SalesForce administrator can create internal users within the SalesForce platform.

What are custom settings?

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

There are 2 types of custom settings:

List Custom Settings: A type of custom setting that provides a reusable set of static data that can be accessed across your organization. If you use a particular set of data frequently within your application, putting that data in a list custom setting streamlines access to it. Data in list settings does not vary with profile or user, but is available organization-wide. Because the data is cached, access is low-cost and efficient: you don't have to use SOQL queries that count against your governor limits.

Hierarchy Custom Settings: A type of custom setting that uses a built-in hierarchical logic that lets you “personalize” settings for specific profiles or users. The hierarchy logic checks the organization, profile, and user settings for the current user and returns the most specific, or “lowest,” value. In the hierarchy, settings for an organization are overridden by profile settings, which, in turn, are overridden by user settings.

What are Governor limits in Salesforce.com?

Salesforce is based on the concept of multi-tenant architecture. In simpler words, Salesforce uses a single database to store the data of multiple clients/ customers. To make sure no single client monopolizes(hamper) the shared resources, Salesforce introduced the concept of Governor Limits which is strictly enforced by the Apex run-time engine

Is it possible to write a validation rule which will fire only on insert of record not on update of record?

Answer: Use isnew() function which checks if the formula is running during the creation of a new record and returns TRUE if it is. If an existing record is being updated, this function returns FALSE.

Is it possible to schedule a dynamic dashboard in Salesforce?

Answer: No, it is not possible to schedule a dynamic dashboard in Salesforce.

.

Is it possible to write a validation rule on record delete?

Answer: No, only in insert and update events you can write validation rule.

Difference between formula field and rollup summary in Salesforce ?

Answer: Rollup Summary field is used to calculate the sum of a fields in the child object record. It is compulsory to be in a Master-Detail relationship to use the rollup summary. A rollup summary field is always created on Master record. (Parent to Child).

Is there any standard object which is also act as junction object ?

Answer: Yes there are some standard objects which acts as a junction object.

Opportunity Product between Oppty and Product,

PricebookEntry between Product and Pricebook.

OpportunityContactrole is the junction between Opportunity and Contact, and also

Quote is the junction between Contract and Opportunity.

What is the default data time format of Salesforce ?

DateTime: Salesforce stores all DateTimes in Coordinated Universal Time (UTC) format. Remember that dateTime field values are stored as Coordinated Universal Time (UTC). When one of these values is returned in the Salesforce application, it is automatically adjusted for the timezone specified in your organisation preferences. Your application may need to handle this conversion.

Date : fields contain no time information and completely ignore timezones. Whatever date you specify when you set it will be the date every user sees, with any time and zone information being ignored.

How to insert null values into Dataloader ?

Answer: Go to data loader -> setting -> check Is null values checkbox.

What is the difference between trigger and workflow in Salesforce ?

Answer:

**Workflow**:

1. Workflow will be helpful to update the same object or master object in custom master-detail relationships.
2. Coding is not required.
3. Workflow actions are Field Update, Email alert, Task alert and outbound message.
4. We cannot use SOQL query from database on workflow.
5. We cannot fire workflows after record has been deleted.

**Trigger**:

1. Trigger can work across objects.
2. Coding is required.
3. Trigger executes before or after these types of operations insert, update, delete, merge, upsert & undelete.
4. We can use SOQL’s from data base in one trigger.
5. We can fire Trigger after record has been deleted.

What is fiscal year in salesforce ?

Answer: If your organisation's fiscal year follows the Gregorian calendar, but does not start in January, you can simply and easily set your fiscal year by defining a standard fiscal year with a different starting month. If your fiscal year follows a different structure from the Gregorian calendar, you can define a custom fiscal year that meets your needs.

Whether you use a standard fiscal year or a custom fiscal year, you define individual fiscal years one time. These fiscal year definitions allow you to use these fiscal periods throughout Salesforce including in reporting, opportunities, and forecasting.

Salesforce allows two types:

**–Standard Fiscal Years** are periods that follow the Gregorian calendar, but can start on the first day of any month of the year. (A Gregorian Year is a calendar based on a 12 Month Structure and is used throughout much of the world.)

**–Custom Fiscal Years** are for companies that break down their fiscal years, quarters and weeks in to custom fiscal periods based on their financial planning requirements.

**Note**: After you enable custom fiscal years, you cannot disable the feature. However, if you need to revert to standard fiscal years, you can define custom fiscal years that follow the same Gregorian calendar structure as the Salesforce standard fiscal years.

Will data be lost in a custom field if data type is changed to number from any other data type?

Answer: Yes. Changing the data type of an existing custom field can cause data loss in the following situations:

* Changing to or from type Date or Date/Time
* Changing to Number from any other type
* Changing to Percent from any other type
* Changing to Currency from any other type
* Changing from Checkbox to any other type
* Changing from Picklist (Multi-Select) to any other type
* Changing to Picklist (Multi-Select) from any other type. Currently defined picklist values are retained when you change a picklist to a multi-select picklist. If records contain values that are not in the picklist definition, those values are deleted from those records when the data type changes.
* Changing from Auto Number to any other type
* Changing to Auto Number from any type except Text
* Changing from Text to Picklist
* Changing from Text Area (Long) to any type except Email, Phone, Text, Text Area, or URL.

How to handle fault in Salesforce flow?

We can send emails or fault screen can be created. If any element is connected to second screen, it automatically becomes fault screen and we can use "$Flow.FaultMessage" on screen to show error message. output text can be added on screen with message something like "Sorry, an error occurred in the page. For help, provide your administrator with the following information: {!$Flow.FaultMessage}".

What are difference between lookup and fast lookup data elements in flow

Lookup record will return only first matching record however to get all matching record, we should use fast lookup. Any data element with prefix "fast" means to work in bulk.

Governor limits

* Total number of records retrieved by a SOQL query – 50,000.
* Total number of SOQL queries issued – 100 (Synchronous) 200 (Asynchronous)
* Total number of DML statements issued – 150.
* Total number of callouts (HTTP requests or Web services calls) in a transaction – 100.

User1 is able to see 30 account records and user2 is able to user1s records plus 40 records total 70 records how is it possible?

By using Role hierarchy user2 might be manager to user1

By using Manual sharing: User1 can share the records to user2.

If the Roles are same then user2 might be in public group

If the Roles are different then sharing rules applied between user1 and user2.

There is one field which is used in Lead conversion and I want to convert its data type, is this possible?

Answer: No, You can not change the data type of any custom field that is mapped for lead conversion.

Can we convert formula field into any other data type ?

Answer: No, Formula fields are special read-only fields that cannot be converted to any other data type. Likewise, you cannot convert any other field type into a formula field.

What are the Types of Sharing Rules in Salesforce and explain it?

Account Sharing Rules:

Based on who owns the account

Set default sharing access for accounts and their associated cases, contacts, contracts, and opportunities

Contact Sharing Rules:

Based on who owns the contact (must be associated with an account)

Set default sharing access for individual contacts and their associated accounts

Cannot use with: Territory Management and B2I (Person Account) enabled orgs

Opportunity Sharing Rules (EE/UE):

Based on who owns the opportunity

Set default sharing access for individual opportunities and their associated accounts

Case Sharing Rules (EE/UE):

Based on who owns the case

Set default sharing access for individual cases and associated accounts

Lead Sharing Rules (EE/UE):

Based on who owns the lead

Set default sharing access for individual leads

Custom Object Sharing Rules (EE/UE):

Based on who owns the custom object

Set default sharing access for individual custom object records

What are analytical snapshots?

Analytic snapshot capture and store the data at pre decided intervals. It captures data from reports and saves in custom objects as per schedule. It only supports tabular and summary reports as a source report. It does not support matrix reports. The field type in the target object must be the same as the source report object field. Or

Answer — Analytical snapshots can be used to schedule a report run and then save the report result as records in a custom object. While building an analytical snapshot we have to select a source report and destination object. Then map the fields from report and object. The report runs at specified time and then inserts the report result as records in that object.

Advantages that we get through analytical snapshot are as below, Runs reports faster, Sort and filter data using list views, can view trends in data via object records. The object selected for record insertion should not have any insert trigger on it.

What are the various ways of deployment in salesforce?

Answer — Metadata components in salesforce can be deployed using various ways as below

Change set, Eclipse IDE, ANT, Workbench

What is a recursive workflow rule? How to avoid recursive workflow rules?

Answer:

Whenever you enable Re-evaluate Workflow Rules after Field Change checkbox in the Field Update of a workflow rule, due to this field update another workflow rule on the same object will be fired if the entry criteria of those workflow rules are satisfied.

And , You have other workflow rules also if you enable Re-evaluate Workflow Rules after Field Change checkbox in the Field Update recursive workflow rules will come in some scenarios.

We can take two steps to avoid recursive workflow rules :

For the workflow Evaluation Criteria if you choose created, and any time it’s edited to subsequently meet criteria option, we can avoid recursive workflow rules.

If you don’t enable Re-evaluate Workflow Rules after Field Change checkbox in the Field Update of a workflow rule we can avoid.

What is an account team?

Answer — Account team is a group of users that work on a particular account. The users in an account team can be given access depending on the need. An account team appears as a related list on account.

What is the difference between 15 digit and 18 digit IDs in Salesforce?

Answer:

15 digit ID in salesforce.com is case sensitive and 18 Digit Id is case-insensitive.

When Group By is used, How to write or use the Where clause in SOQL ?

Answer :

We cannot use the Where clause with Group By instead we will need to use the Having Clause.

If a user does not have any right on a particular record and have only read level access at object level. Can he change the record owner?

Answer :

Yes. In the profile, there is a setting for Transfer Record.

We have a Time Based Workflow and there is Action scheduled to be executed. If we Deactivate the workflow, Scheduled actions will be removed from the queue or not?

Answer : Even after the deactivation of workflow, its action will be active in the queue.

How to clear the Time based workflow action queue ?

Answer : Two ways to achieve this.

1. Make criteria false for all those records.
2. Go to Set up -> Monitoring -> Time Based Workflow and search for scheduled actions and then remove from the queue.

We have Time Based Workflow and there is action scheduled to be executed. Can we delete that workflow?

Answer : If a workflow has any pending time dependent action, then we cannot delete the workflow.

While creating workflow on Task object, what difference observed on available actions?

Answer : Send Email action is not available while creating workflow on task object.

How can you use the Datetime field as a criteria in SOQL Query ?

Answer :

We cannot use Datetime as condition in Where Clause in between single Quotes.

You can do something like this ,

WHERE CreatedDate > 2017–01–02T00:00:00Z

OR you can also use Date Literals like

WHERE CreatedDate > YESTERDAY

Why am I not able to find a list of Person Account fields in Field Level Security (FLS) settings when navigated to fields on Account Object.

Answer : Field Level Security (FLS) of Person Account fields are controlled by Contact Fields. So, if you want to setup FLS of Person Account Fields navigate to fields of Contact and it will be reflected on Person Account.

How to report on a User License field?

Answer : Create formula field in User Object with formula Profile.UserLicense.Name.

Note: You need to copy and paste this value because it doesn’t show up in the fields drop down.

Explain Skinny table in Salesforce.

Salesforce creates skinny tables to contain frequently used fields and to avoid joins, and it keeps the skinny tables in sync with their source tables when the source tables are modified. To enable skinny tables, contact Salesforce.com Customer Support.

For each object table, Salesforce maintains other, separate tables at the database level for standard and custom fields. This separation ordinarily necessitates a join when a query contains both kinds of fields. A skinny table contains both kinds of fields and does not include soft-deleted records.

What are the considerations for Skinny Table?

Answer :

Skinny tables can contain a maximum of 100 columns.

Skinny tables cannot contain fields from other objects.

Skinny tables are not copied to sandbox organizations. To have production skinny tables activated in a sandbox organization, contact Salesforce.com Customer Support.

Which fields are automatically Indexed in Salesforce ?

RecordTypeId

Division

CreatedDate

Systemmodstamp (LastModifiedDate)

Name

Email (for contacts and leads)

Foreign key relationships (lookups and master-detail)

The unique Salesforce record ID, which is the primary key for each object.

Which fields cannot be added as a custom Index?

multi-select picklist

text area (long)

text area (rich)

non-deterministic formula fields (Like any formula field using function NOW() or Today() )

encrypted text fields.

What is custom metadata type ?

Answer : Custom metadata is customizable, deployable, packageable, and upgradeable application metadata. First, you create a custom metadata type, which defines the form of the application metadata. Then you build reusable functionality that determines the behavior based on metadata of that type. Similar to a custom object or custom setting, a custom metadata type has a list of custom fields that represent aspects of the metadata.

Before Custom metadata type, we were using Custom settings of List type. Problem with custom setting was that, during migration or in packages, data were not migrated. We had to either use data loader or some API to create initial data. However, if we package custom metadata type or migrate it, data will also be migrated along with it.

Portals overview in Salesforce :- There are 3 types of Salesforce.com Portals.

1. Self-Service portal

2. Partner Portal

3. Customer Portal

Self-Service portal:- Self-Service provides an online support channel for your customers – allowing them to resolve their inquiries without contacting a customer service representative.

Partner Portal:-Partner Portal is to support your Partners. Partner users are Salesforce users with limited capabilities. They are associated with a particular partner account, have limited access to your organization’s data, and log in via a partner portal.

Customer Portal:- A Salesforce.com Customer Portal is similar to a Self-Service portal in that it provides an online support channel for your customers—allowing them to resolve their inquiries without contacting a customer service representative.

What is the difference between Customer portal and Partner portal?

Partner Portal Shows The Leads And Opportunity Objects Whereas The Customer Portal Does Not.

2. Customer Portal Is More Focused On Support Needs, So Your Customers Can Interact With Cases.

3. Customer Portal Mainly For Company Customers Where As Partner Portal For Channels People That Means Sales People Etc

4. Partner Licenses, Having More Access To The Core CRM Features, Were Significantly More Expensive.

The feature differences are that Partner Portal exposes the Leads and Opportunity objects whereas the Customer Portal does not. However, only the top tier of Partner licensing (Gold Partner licenses) exposes the Case object whereas this is standard in the Customer Portal.

What is a Solution in Salesforce?

• An answer to a common question or problem

• Enables Customer Support users get up to speed quickly

• Enables Support teams to answer questions quickly and consistently

• Customers search for and browse published Solutions to self assist

• Content-Rich Solutions are an enhancement to the Solution Object which allows solution writers to integrate rich text and

images into their solutions to completely solve a problem

Explain Lead conversion?

Lead can be converted in salesforce.com and the converted information is mapped to the appropriate business objects — Account, Contact or Opportunity

• The system automatically maps standard lead fields to standard account, contact, and opportunity fields

• For custom lead fields, your administrator can specify how they map to custom account, contact, and opportunity fields

• The system assigns the default picklist values for the account, contact, and opportunity when mapping any standard lead picklist fields that are blank. If your organization uses record types, blank values are replaced with the default picklist values of the new record owner.

• If the lead has a record type, the default record type of the new owner is assigned to records created during lead conversion.

Company ::Account: Account Name, Contact: Account, Opportunity: Opportunity Name and Account Name

Lead last name::: contact lst name

Lead Owner ——-Account: Owner, Contact: Owner, Opportunity: Owner

Lead Source ::::Account: Lead Source, Contact: Lead Source, Opportunity: Lead Source, Person Account: Lead Source

Phone :::Account: Phone, Person Account: Phone, Contact: Phone

Postal Code ::Account: Billing Postal Code, Person Account: Mailing Postal Code and Billing Postal Code

Rating :Account: Rating, Person Account: Rating

Salutation : Person Account: Salutation

State : Account: Billing State, Person Account: Mailing State and Billing State

State Code ::Account: Billing State Code, Person Account: Mailing State Code and Billing State Code

Street :Account: Billing Street, Person Account: Mailing Street

Title :: Contact: Title, Person Account: Title

Website :Account: Website, Person Account: Website

Explain the lead conversion process in salesforce?

When you convert a lead, the standard lead fields are automatically converted to the new account, contact, and, optionally, an opportunity using the information from the lead.

Custom lead fields are converted to custom account, contact, and opportunity fields as specified by your administrator.

All open and closed activities from the lead are attached to the account, contact, and opportunity.

What are differences between workflows and approval process?

The key difference between workflows and approval process are as below

Workflow rules consist of single step and a single action where as approval process has multiple steps and different actions.

Workflow rules trigger automatically and the rules when triggered are not visible to the user. Approval process on the other hand, contains multiple steps each requiring a specific “I Approve or Reject” user action by the specified approvers.

Tell me about Jump Start Wizard versus Standard Wizard in Salesforce?

The Jump Start wizard creates a one-step approval process for you in just a few minutes

The Standard Wizard is useful for complex approval processes.

Jump Start Wizard

• The jump start wizard is useful for simple approval processes with a single step.

• Use the jump start wizard if you want to create an approval process quickly by allowing Salesforce to automatically choose some default options for you.

Standard Wizard

• The standard wizard is useful for complex approval processes.

• Use it when you want to fine tune the steps in your approval process.

• The standard wizard consists of a setup wizard that allows you to define your process and another setup wizard that allows you to define each step in the process.

What is the Parallel Approval Routing ?

Parallel Approval Routing is sending approval requests to multiple approvers in a single step Wait for approval from all the approvers or wait for approval from any one

Configure an approval step to request approval from any combination of multiple users and related users

Configure 25 parallel approvers at each step.

What are the Time-Dependent Workflow — Considerations ?

Maximum of 10 time triggers per rule

Maximum of 40 actions (10 x 4 types) per time trigger, and 80 actions per workflow rule

Workflow default user must be set up before creating time-based rules

Precision limited to hours or days

Cannot convert leads with time-dependent actions in the Workflow Queue

Time triggers cannot be added to or removed from activated workflow rules

Not possible to create a time-dependent action associated to a rule with a trigger type of Every time the record is created or updated

How to delete the users data from Salesforce?

Ans : To delete the Users Data go to Setup | Administration Setup | Data Management | Mass Delete Record, from there select the objects like Account, Lead etc and in criteria select the users name and delete all records of that user related to particular object.

How to restrict the user to see any record, lets say opportunity?

Ans : set up opportunity sharing to be private. If both users are admins or have view all records on opportunity, then that overrides private sharing.

What is difference between WhoId and WhatId in the Data Model of Task ?

WhoID refers to people things. So that would be typically a Lead ID or a Contact ID

WhatID refers to object type things. That would typically be an Account ID or an Opportunity ID

How you can provide the User Login (Authentication) in Public sites created by Salesforce.

We can provide the authentication on public sites using “Customer Portal”.

How validation rules executed? is it page layout / Visualforce dependent?

The validation rules run at the data model level, so they are not affected by the UI. Any record that is saved in Salesforce will run through the validation rules.

If i want record level access then what should i use from Salesforce security model?

Ans: Manual Sharing

If I want Object level access then what should i use from Salesforce security model?

Ans: Profile

In OWD (Organization wide sharing), can i change the setting “Grant Access Using Hierarchies” for Standard Objects ?

Ans: You cannot change it for Standard Objects However for Custom Objects its possible.

What is Mandatory while creating User, Role or Profile?

Ans : Its Profile.

In case of Master-Detail relationship, on Update of master record can we update the field of child record using workflow rule?

Ans: No

In case of Master-Detail relationship, on Update of child record can we update the field of Parent record using workflow rule?

Ans: Yes, the Master fields are also available for “Criteria evaluation”.

If a user doesn’t have any right on a particular record and has only read level access at object level. Can he change the record owner?

Ans : Yes. In the profile, there is a setting for “Transfer Record”.

In Which Scenario share object “MyCustomObject\_\_share” is not available/created for custom object “MyCustomObject” ?

Ans: The object’s organization-wide default access level must not be set to the most permissive access level. For custom objects, this is Public Read/Write.

How to hide the “App Setup” Menu from user’s setup page?

Ans : In Profile, remove access “View Setup and Configuration”

While setting OWD (Organization wide sharing), can we change/modify the setting of child record in case of Master-Detail relationship?

Ans: No, Child record is controlled by the Parents setting.

While creating a new profile for a user, which existing profile should be copied?

Ans: If the new user is not System administrator then copy from “Standard User” profile.

Who can run reports?

Ans : Users with permission “Run Report” and access to the report folder can only run the report.

What is the Difference between “Printable View” and “Export Details” button on report?

Printable View: formatting, grouping and subtotals are persisted.

Export Details: formatting, grouping and subtotals are lost.

What is the use of “floating report header”?

Ans: If you have long tabular report, you can make the column header visible on each pages as you scroll, by enabling floating report headers.

How to enable “floating report header”?

Go to “Setup | App Setup | Customize | Report and Dashboard | User Interface Settings “.

Click on checkbox “Enable Floating Report Headers”

Which permission is required to set the running user other than you in dashboard?

Ans: “View All Data” in profile.

Who can access “drag and drop dashboard”?

Ans : User with permission “manage dashboard”.

What are features of “Manage Members” in campaign records?

Campaign members are created from lead, contact, or person account records. Salesforce provides a variety of ways in which you can manage your campaign members. You can add and update up to 50,000 campaign members at a time through lead, contact, and person account reports; you can search for and add or edit multiple leads and contacts from the Manage Members page; you can add an unlimited number of leads and contacts using a CSV import file; or you can add members to a campaign one at a time from contact or lead detail pages.

Give any scenario when you cannot change the currency field type to numeric type.

Ans : When the field is used either in Apex class or trigger.

We have a “Time Based Workflow” and there is Action scheduled to be executed. If we Deactivate the workflow, Scheduled actions will be removed from the queue or not?

Ans : Even after the deactivation of workflow, its action will be active in the queue.

Suppose you are the standard user, you have all the CRED permissions on CAMPAIGN object but you don't have access to create a record, why?

Ans:) marketing user option should be checked for that user to access the CAMPAIGN object.

If the OWD for account object is private then is it possible to access the account record by other users apart form the owner?

Ans:) 1. All the people above the role hierarchy, they can access the records.

2. By using sharing rules, we can share those records to other users.

3. Account Team members can access these records.

If there is a validation rule if amount = 100 then it should display error msg, Then I saved the record by giving value as 1000 then I had written a workflow if amount > 100 then I am updating amount field value with 100. Then what will be the result?

A) First validation rules will get execute then workflow rules will be execute so the answer is 100 (Even though there is validation rule because of the workflow it will accept 100 in amount field.

What is the difference between task and event?

Task: Task is nothing but work assigned to a particular person, it doesn't have certain time limit.

Event: It has certain time limit in that time only all persons should assemble after the time limit over, event will get complete.

What the record criteria meets for a time dependent workflow email has submitted in queue which will trigger the email in one month. If somebody modified the record which won't meet the time dependent workflow rule criteria, what will happen?

Email won't be triggered since workflow criteria is not satisfied for the record, salesforce will remove the action to send the email from the queue.

What the record criteria meets for a time dependent workflow email has submitted in queue which will trigger the email in one month. If somebody modified the record which meet the time dependent workflow rule criteria, but date has passed already then what will happen?

Example: 7 days before closed date email needs to fire.

Initial closed date: 9th Aprl 2020 and Todays date : 25th march 2020 Modified Closed date is: 30th march 2020.. Actual email needs to fire on 23rd march but date has passed already

Email fired immediately when record saves with the passed date

if the field is mandatory at page layout level and if we try to insert records through data loader with out populating those mandatory fields what will happen?

If the field is mandatory at page layout level then only while inserting records from page layout level if we won't populate the fields with values it will throw error. If we insert records from data loader it won't throw error.

Even if we mention the record type while inserting record through program it will throw error message.

In Data loader using upsert operation can u do update a record if that record id is already exist in page and if updated that record then can u update 2records with having same id and if not updated 2 records then what error message is given?

It is not possible to update records with same id in a file using upsert operation. It will throw "duplicate ids found" error.

In how many ways we can invoke flows?

We can invoke flows from different ways

From Apex

From Process Builder

Directly from the button invocation

What is External id?primary id?

External id is unique to external application.

Primay id is unique to internal organization.

Data loader?and which format it will support?

Data loader is a tool to manage bulk data. It will support .csv format of Excel.

How import wizard will not allow the duplicates?

Using external id.

What are validation rules?

Used to maintain data format.

Salesforce sites?

Used to show data from our organization for public view.

Auto-response rules and Escalation rules(for which objects are mandatory)?

Case and Lead.

How to create a standard object as a child to a custom object(which is not possible thru standard away process,have to bypass this restriction)?

Create Lookup and make the lookup field mandatory.

what is audit field,what is the purpose of audit field?

Created By, Created Date, Last Modified By and Last Modified Date are audit fields. Used to track when the changes are done to the records.

what we need to do for extending the limit of creating only 2 M-D relationships for custom object?

Create Lookup and make the lookup field mandatory.

Can you tell the difference between Profile, OWD or a Sharing Rule?

Profile: Profile is used for object level access. It is used to provide CRUD(Create, Read, Update and Delete) permission.

OWD: OWD is used for record level access for all the users across Organization. It is used to provide Public Read Only, Public Read/Write, Private, Public Read/Write/Transfer(Lead and Case Objects alone).

Sharing Rule: Sharing Rules is used to extend Role Hierarchy.

Sharing rules applicable to one group to another group or one role to another rule

If the field is not visible in the layout but you want to see the data of that particular field?

We can Query and see the data particular field

I have an OWD which is read only, how all can access my data and I want to give read write access for a particular record to them, how can i do that?

All users can just Read the record.

Create a Sharing Rule to give Read/Write access with "Based on criteria" Sharing Rules.

What is the difference between role hierarchy and sharing rules?will both do the same permissions?

Role Hierarchy states that a higher hierarchy person can see lower hierarchy person records.

Sharing Rule is used to extend Role Hierarchy.

What is the on-Demand process?

On-demand process is nothing but the "pay for what you use" policy.

We can subscribe to what we want and pay-as-you-go model.

If your organization Workflow's limit is over and if you want to write a workflow immediately and it is critical, what will you do?

1. Deactivate any workflows and create it using trigger and then do the new workflow.

or

2. Go for Schedule apex or trigger to achieve this workflow.

How users are differentiated in salesforce?

Ans: Users are differentiated by creating their own individual profiles in salesforce. Each profile defines the level of access in salesforce organization for that user.

What is static dashboard?

Ans: Static dashboards are the basic dashboard with fixed view (Single user perspective) and which is visible to any user who has made a report out of his data.

Can dynamic dashboards be scheduled?

Ans: Dynamic dashboard always show data integrated with real time so we can not scheduled dynamic dashboard.

Can we have multiple active assignment rules in lead?

Ans: No only one rule can be active at a time.

What is non-deterministic Force.com formula fields?

Ans: The formula fields whose values is not static or not known and changed at runtime/ dynamically are non-deterministic Force.com formula fields.

Give some example Non-deterministic formula fields

Fields having dynamic functions like TODAY(), NOW() from Date class.

Lookup fields

Formula fields who refers the values of other dynamic fields

What is deterministic formula fields?

Ans:The formula fields whose value is static or known are called as deterministic fields.

List out the data types which can be used for defining External ID’s.

Ans: Auto-Number, Text, Number, and E-Mail these data types can be used to define external ID’s.

A user successfully login’s at 3:00 PM, What happens at 3:31 PM, if the Login hours for the user’s Profile is set from 7:30 AM to 3:30 PM?

User is logged out once he tries to do any DML (Data Manipulation) Operation

What is the Impact on a User of the Organization level Locale Changes?

No Impact on the User as he keeps using his own default Locale

Which of the following profile permissions will enable the User to edit any record, regardless of the Sharing Model?

Modify All Data

Do Validation rules get enforced on the Lead Conversion?

Yes

Is it possible for a user to see a different Set of data in Report and in a Dashboard based on the same Report?

yes

Is it possible to schedule a dynamic dashboard in Salesforce?

No

A developer is loading data, in CSV format, into a custom application from a legacy system. The developer would like to load users into the user object and positions and job applications owned by named users into related custom objects. Which obstacle will the developer encounter when using the import wizard?

The import wizards do not support the User object

While changing the length of a text field what happened to the exiting data?

if you increase the length of the text fiels then no prob

but if you decrease the length of the field then the existing data will get truncated

can a user create there own custom logo while creating there own custom application?

In which object all Approval process are stored?

Approval

In which object all email templates are saved?

EmailTemplate

In which object all Account Team Members are added?

AccountTeamMember

In which object all salesforce objects are saved?

sObject

In which object all Opportunity Team Members are added?

OpportunityTeamMember

In Which object all Apex Pages are stored?

ApexPage

In Which object all Apex Triggers are stored?

ApexTrigger

In Which object all Apex Classes are stored?

ApexClass

Where Products are added?

Product2

In which object workflows are stored?

Workflow

**Trigent**

1.how to create holiday in salesforce?

2.Integration testing positive and negative test cases?

3. if the field is mandatory at page layout level and if we try to insert records through data loader with out populating those mandatory fields what will happen?

4. dfrnce between process builder and workflow?

5. Have you ever done api testing?

6. how can you delete users by using dataloader or soql or any thing?

7. Have you ever checked debug logs? what kind of errors you can see in debugs?

8. whenever record creates in third party system that record needs to create in salesforce via integration what are the positive and negative test cases for this?

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Testing questions are copied from the below link <https://www.softwaretestingmaterial.com/100-software-testing-interview-questions/>

What is Software Testing?

A process of analyzing a software item to detect the differences between existing and required conditions (i.e., defects) and to evaluate the features of the software item.

<http://www.pavantestingtools.com/2016/08/manual-testing-real-time-interview.html>

What is the status can give to a test case?

A. Status are pass, fail, blocked, no run.

How do you find whether a test case is a good test case or bad test case?

A. A good test case is one which finds the bug or one which has a high probability of finding the bug. A good test case should be documented clearly, so that it can be executed by anyone without any difficulties and confusion.

Do you run all regression tests for every bug fixed?

A. No, I didn’t run regression test cases for every bug fixed. I run regression tests once for every build.a

When you fill the data in the application form, how do you ensure that the data is stored in the correct tables and columns?

A. we can write an SQL query to retrieve data from the data base and compare the query result with the data we have filled in the application forms.

What is test log?

It is a report of what tests have been executed and thier status like pass/ fail. it is also known as Test execution report.

Did you observe any application logs during the test execution?

yes. We do observe logs of the application server to check whether the server has thrown any runtime errors.

Do you run all regression tests every time ?

A. Depends. if we are sure that the fix might not affect other modules, we run regression tests specific to the module of the bugs fixed, else we run for the entire project.

How do you know your test cases are completed?

A. We follow two step approaches to ensure that test cases are completed.

a. reviews-- it ensures that quality of the test cases is good.

b. Requirement traceability matrix ---it ensures that all requirements have been covered through test cases.

What is the difference between test scenario and test case?

A. Test scenario is a high level description of business requirements, which is latter decomposed in to a set of test cases. These test cases will be reviewed and approved by peers. we follow formal review process for approving test cases written for each functionality.

Do you update the test cases after receiving build based on the application screen?

A. During execution, if we feel any test case requires an update, we will do it with the approval of the team lead. but this work is very limited.

What are the documents required for test analysis?

1. SRS/FRS

2. Use case

3. Architecture document

What is an entry criterion for test closure?

A. Decision to stop testing

What is lessons learnt document?

> no of test cases/scenarios blocked

> No of defects verified and their respective status.

> Weekly status reporting:

> Test case summary

> Issues found

> Issues resolved

> Critical issues which are still open and which requires immediate attention from the client side

> The report should also contain high plan for the next week.

When we choose Informal Testing?

Whenever we don’t have proper documentation (Requirements etc…) and sufficient Time then we choose Informal Testing. Using Experienced based Techniques (Ex: Error Guessing, Exploratory Testing etc…) we conduct Testing.

Mention the difference between Data Driven Testing and Retesting?

Retesting: It is a process of checking bugs that are actioned by the development team to verify that they are fixed.

Data Driven Testing (DDT): In data driven testing process, the application is tested with multiple test data. The application is tested with a different set of values.

What are the different test levels?

There are four test levels

Unit/component/program/module testing

Integration testing

System testing

Acceptance testing

Q: If there is a bug which you missed to report and your product release date is near. And, you dont have time to do full regression. what will you do?

A: Have to inform to client about the bug before itself and should ask client to release the pending bug in the next sprint

What is SDLC?

Software Development Life Cycle (SDLC) aims to produce a high-quality system that meets or exceeds customer expectations, works effectively and efficiently in the current and planned information technology infrastructure, and is inexpensive to maintain and cost-effective to enhance.

* Requirement gathering
* Analysis
* Design,
* Coding,
* testing
* deployment

Can you do System testing at any stage of SDLC?

We can do System Testing only when all the units are in place and working properly. It can only be done before User Acceptance Testing (UAT).

What is the procedure of manual testing?

Manual testing is crucial for testing software applications more thoroughly. The procedure of manual testing comprises of the following.

1. Planning and Control

2. Analysis and Design

3. Implementation and Execution

4. Evaluating and Reporting

5. Test Closure activities

What is STLC?

STLC (Software Testing Life Cycle) identifies what test activities to carry out and when to accomplish those test activities. Even though testing differs between Organizations, there is a testing life cycle.

Requirement analysis

Test planning

Test design

Test environment setup

Test execution

Test closure

When to stop testing? (Or) How do you decide when you have tested enough?

There are many factors involved in the real-time projects to decide when to stop testing.

Testing deadlines or release deadlines

By reaching the decided pass percentage of test cases

The risk in the project is under acceptable limit

All the high priority bugs, blockers are fixed

When acceptance criteria is met

Explain different test execution strategies?

A. There are 3 test execution strategies.

They are pass1, pass2, pass 3

Pass1 Test execution strategy:

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In this execution model one execution cycle will be there. In this one execution cycle

Itself testers log defects and retest that defect. This is useful in stable, small with

2nd pass:

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Development team releases new build claiming all the defects are fixed. Testing team retest all defects with adhoc regression. if new defects are found development team release new build and the life cycle is repeated until no new defects.

3rd pass:

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Testing team runs full regression suite and this phase completes only when full regression is completed. This is good model for large, complex and critical projects. In case of getting large no of defects in pass -2 strategy, one may have to move to pass-3 strategy.

What are the entry and exit criteria for test execution?

Entry criteria:

--------------------------------

> coding should be completed

> test cases should be ready and base lined

> RTM should be updated

> test data should be read and base lined

> test environment/set up should be ready.

>s/w tools should be ready and approved.

Exit criteria:

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> All test cases must be executed and passed

> All defects identified must be fixed, retested and closed

> Test execution summary report must be prepared

What are Quality Assurance and Quality Control?

Quality Assurance: Quality Assurance involves in process-oriented activities. It ensures the prevention of defects in the process used to make Software Application. So the defects don’t arise when the Software Application is being developed.

Quality Control: Quality Control involves in product-oriented activities. It executes the program or code to identify the defects in the Software Application.

QC detects bugs by inspecting and testing the product. This involves checking the product against a predetermined set of requirements and validating that the product meets those requirements.

Examples of QC include technical reviews, software testing and code inspections.

What is Verification in software testing?

Verification is the process, to ensure that whether we are building the product right i.e., to verify the requirements which we have and to verify whether we are developing the product accordingly or not. Activities involved here are Inspections, Reviews, Walk-throughs.

What is Validation in software testing?

Validation is the process, whether we are building the right product i.e., to validate the product which we have developed is right or not. Activities involved in this is Testing the software application

What is Static Testing?

Static Testing involves in reviewing the documents to identify the defects in the early stages of SDLC.

What is Dynamic Testing?

Dynamic testing involves in the execution of code. It validates the output with the expected outcome.

What is White Box Testing?

White Box Testing is also called as Glass Box, Clear Box, and Structural Testing. It is based on applications internal code structure. In white-box testing, an internal perspective of the system, as well as programming skills, are used to design test cases. This testing usually was done at the unit level.

What is Black Box Testing?

It is also called as Behavioral/Specification-Based/Input-Output Testing

Black Box Testing is a software testing method in which testers evaluate the functionality of the software under test without looking at the internal code structure. This can be applied to every level of software testing such as Unit, Integration, System and Acceptance Testing.

Black Box Testing Techniques:

Equivalence Partitioning

Boundary Value Analysis

Decision Table

State Transition

Testers create test scenarios/cases based on software requirements and specifications. So it is AKA Specification Based Testing.

Tester performs testing only on the functional part of an application to make sure the behavior of the software is as expected. So it is AKA Behavioral Based Testing.

The tester passes input data to make sure whether the actual output matches the expected output. So it is AKA Input-Output Testing.

What is Grey Box Testing?

Grey box is the combination of both White Box and Black Box Testing. The tester who works on this type of testing needs to have access to design documents. This helps to create better test cases in this process.

What is Positive and Negative Testing?

Positive Testing: It is to determine what system supposed to do. It helps to check whether the application is justifying the requirements or not.

Negative Testing: It is to determine what system not supposed to do. It helps to find the defects from the software.

What is Test Strategy?

Test Strategy is a high-level document (static document) and usually developed by project manager. It is a document which captures the approach on how we go about testing the product and achieve the goals. It is normally derived from the Business Requirement Specification (BRS). Documents like Test Plan are prepared by keeping this document as a base.

1. Scope and overview
2. Test Approach : (Test levels, Test types, Roles and responsibilities, Environment requirements)
3. Testing tools
4. Industry standards to follow
5. Test deliverables
6. Testing metrics
7. Requirement Traceability Matrix
8. Risk and mitigation
9. Reporting tool
10. Test summary

Test strategy document gives a clear vision of what the test team will do for the whole project. It is a static document means it won’t change throughout the project life cycle. The one who prepares this document, must have good experience in the product domain, as this is the document that is going to drive the entire team and it won’t change throughout the project life cycle (it is a static document). Test strategy document should be circulated to entire testing team before the testing activities begin. Writing a good test strategy improves the complete testing process and leads to produce a high-quality system.

Difference between build and release?

What is Test Plan and contents available in a Test Plan?

Test plan document is a document which contains the plan for all the testing activities to be done to deliver a quality product. Test Plan document is derived from the Product Description, SRS, or Use Case documents for all future activities of the project. It is usually prepared by the Test Lead or Test Manager.

1. Test plan identifier
2. References
3. Introduction
4. Test items (functions)
5. Software risk issues
6. Features to be tested
7. Features not to be tested
8. Approach
9. Items pass/fail criteria
10. Suspension criteria and resolution requirements
11. Test deliverables
12. Remaining test tasks
13. Environmental needs
14. Staff and training needs
15. Responsibility
16. Schedule
17. Plan risks and contingencies
18. Approvals
19. Glossaries

Difference between test strategy and test plan?

1. Test Strategy is a high level document which captures the approach on how we go about testing the product and achieve the goals. ------- Test plan document is a document which contains the plan for all the testing activities to be done to deliver a quality product.
2. Components of Test strategy includes Scope and overview, Test Approach, Testing tools, Industry standards to follow, Test deliverables, Testing metrics, Requirement Traceability Matrix, Risk and mitigation, Reporting tool, Test summary ------- Components of Test plan includes Test Plan Identifier, Features To Be Tested, Features Not To Be Tested, Approach, Pass/Fail Criteria, Suspension Criteria, Test Deliverables, Responsibilities, Staffing and Training Needs, Risks and Contingencies etc.,
3. It is developed by the project manager ----It is prepared by test lead or test manager
4. It is derived from the Business requirement specifications (BRS) ------ It is derived from the Product Description, SRS, or Use Case documents
5. It is a static document. Once defined, it cannot be changed -------- It is a dynamic document. It can be changed
6. It is defined at organization level and can be used for other projects of similar nature -------- It is defined at project level

What is Test Suite?

Test Suite is a collection of test cases. The test cases which are intended to test an application.

What is Test Scenario?

Test Scenario gives the idea of what we have to test. Test Scenario is like a high-level test case.

What is Test Case?

Test cases are the set of positive and negative executable steps of a test scenario which has a set of pre-conditions, test data, expected result, post-conditions and actual results.

What is Test Bed?

An environment configured for testing. Test bed consists of hardware, software, network configuration, an application under test, other related software.

What is Test Environment?

Test Environment is the combination of hardware and software on which Test Team performs testing.

What is Test Data?

Test data is the data that is used by the testers to run the test cases. Whilst running the test cases, testers need to enter some input data. To do so, testers prepare test data. It can be prepared manually and also by using tools.

For example, To test a basic login functionality having a user id, password fields. We need to enter some data in the user id and password fields. So we need to collect some test data.

What is Test Harness?

A test harness is the collection of software and test data configured to test a program unit by running it under varying conditions which involves monitoring the output with expected output.

What is Test Closure?

Test Closure is the note prepared before test team formally completes the testing process. This note contains the total no. of test cases, total no. of test cases executed, total no. of defects found, total no. of defects fixed, total no. of bugs not fixed, total no of bugs rejected etc.,

What are the tasks of Test Closure activities in Software Testing?

Test Closure activities fall into four major groups.

Test Completion Check

Test Artifacts handover

Lessons learned

Archiving results, logs,

reports, and other documents and work products in the CMS (configuration management system).

What is test coverage?

Test coverage helps in measuring the amount of testing performed by a set of tests.

Test coverage can be done on both functional and non-functional activities. It assists testers to create tests that cover areas which are missing.

What is Code coverage?

Code coverage is different from Test coverage. Code coverage is about unit testing practices that must target all areas of the code at least once. It is usually done by developers or unit testers.

List out Test Deliverables?

Test Strategy

Test Plan

Effort Estimation Report

Test Scenarios

Test Cases/Scripts

Test Data

Requirement Traceability Matrix (RTM)

Defect Report/Bug Report

Test Execution Report

Graphs and Metrics

Test summary report

Test incident report

Test closure report

Release Note

Installation/configuration guide

User guide

Test status report

Weekly status report (Project manager to client)

What is Unit Testing?

Unit Testing is also called as Module Testing or Component Testing. It is done to check whether the individual unit or module of the source code is working properly. It is done by the developers in the developer’s environment.

What is Integration Testing?

Integration Testing is the process of testing the interface between the two software units. Integration testing is done by three ways. Big Bang Approach, Top-Down Approach, Bottom-Up Approach

What is System Testing or End-To-End Testing?

Testing the fully integrated application to evaluate the system’s compliance with its specified requirements is called System Testing AKA End to End testing. Verifying the completed system to ensure that the application works as intended or not.

What is Big Bang Approach?

Combining all the modules once and verifying the functionality after completion of individual module testing.

Top down and bottom up are carried out by using dummy modules known as Stubs and Drivers. These Stubs and Drivers are used to stand-in for missing components to simulate data communication between modules.

What is Top-Down Approach?

Testing takes place from top to bottom. High-level modules are tested first and then low-level modules and finally integrating the low-level modules to a high level to ensure the system is working as intended. Stubs are used as a temporary module if a module is not ready for integration testing.

What is Bottom-Up Approach?

It is a reciprocate of the Top-Down Approach. Testing takes place from bottom to up. Lowest level modules are tested first and then high-level modules and finally integrating the high-level modules to a low level to ensure the system is working as intended. Drivers are used as a temporary module for integration testing.

What is Functional Testing?

In simple words, what the system actually does is functional testing. To verify that each function of the software application behaves as specified in the requirement document. Testing all the functionalities by providing appropriate input to verify whether the actual output is matching the expected output or not. It falls within the scope of black box testing and the testers need not concern about the source code of the application.

What is Non-Functional Testing?

In simple words, how well the system performs is non-functionality testing. Non-functional testing refers to various aspects of the software such as performance, load, stress, scalability, security, compatibility etc., Main focus is to improve the user experience on how fast the system responds to a request.

What is Acceptance Testing?

It is also known as pre-production testing. This is done by the end users along with the testers to validate the functionality of the application. After successful acceptance testing. Formal testing conducted to determine whether an application is developed as per the requirement. It allows the customer to accept or reject the application. Types of acceptance testing are Alpha, Beta & Gamma.

What is Alpha Testing?

Alpha testing is done by the in-house developers (who developed the software) and testers. Sometimes alpha testing is done by the client or outsourcing team with the presence of developers or testers.

What is Beta Testing?

Beta testing is done by a limited number of end users before delivery. Usually, it is done in the client place.

What is Gamma Testing?

Gamma testing is done when the software is ready for release with specified requirements. It is done at the client place. It is done directly by skipping all the in-house testing activities.

What is Smoke Testing?

Smoke Testing is done to make sure if the build we received from the development team is testable or not. It is also called as “Day 0” check. It is done at the “build level”. It helps not to waste the testing time to simply testing the whole application when the key features don’t work or the key bugs have not been fixed yet.

What is Sanity Testing?

Sanity Testing is done during the release phase to check for the main functionalities of the application without going deeper. It is also called as a subset of Regression testing. It is done at the “release level”. At times due to release time constraints rigorous regression testing can’t be done to the build, sanity testing does that part by checking main functionalities.

What is Retesting?

To ensure that the defects which were found and posted in the earlier build were fixed or not in the current build. Say, Build 1.0 was released. Test team found some defects (Defect Id 1.0.1, 1.0.2) and posted. Build 1.1 was released, now testing the defects 1.0.1 and 1.0.2 in this build is retesting.

What is Regression Testing?

Repeated testing of an already tested program, after modification, to discover any defects introduced or uncovered as a result of the changes in the software being tested or in another related or unrelated software components.

Usually, we do regression testing in the following cases:

* New functionalities are added to the application
* Change Requirement (In organizations, we call it as CR)
* Defect Fixing
* Performance Issue Fix
* Environment change (E.g., Updating the DB from MySQL to Oracle)

What is GUI Testing?

Graphical User Interface Testing is to test the interface between the application and the end user.

What is Recovery Testing?

Recovery testing is performed in order to determine how quickly the system can recover after the system crash or hardware failure. It comes under the type of non-functional testing.

What is Globalization Testing or Internationalization Testing (I18N Testing)?

Globalization is a process of designing a software application so that it can be adapted to various languages and regions without any changes.

What is Localization Testing (L10N Testing)?

Localization is a process of adapting globalization software for a specific region or language by adding local specific components.

What is Installation Testing?

It is to check whether the application is successfully installed and it is working as expected after installation.

What is Formal Testing?

It is a process where the testers test the application by having pre-planned procedures and proper documentation.

What is Risk Based Testing?

Identify the modules or functionalities which are most likely cause failures and then testing those functionalities.

What is Compatibility Testing?

It is to deploy and check whether the application is working as expected in a different combination of environmental components.

What is Exploratory Testing?

Usually, this process will be carried out by domain experts. They perform testing just by exploring the functionalities of the application without having the knowledge of the requirements.

What is Monkey Testing?

Perform abnormal action on the application deliberately in order to verify the stability of the application.

What is Usability Testing?

To verify whether the application is user-friendly or not and was comfortably used by an end user or not. The main focus in this testing is to check whether the end user can understand and operate the application easily or not. An application should be self-exploratory and must not require training to operate it.

What is Security Testing?

Security testing is a process to determine whether the system protects data and maintains functionality as intended.

What is Soak Testing?

Running a system at high load for a prolonged period of time to identify the performance problems is called Soak Testing.

What is Endurance Testing?

Endurance testing is a non-functional testing type. It is also known as Soak Testing. Refer Soak testing.

What is Performance Testing?

This type of testing determines or validates the speed, scalability, and/or stability characteristics of the system or application under test. Performance is concerned with achieving response times, throughput, and resource-utilization levels that meet the performance objectives for the project or product.

What is Load Testing?

It is to verify that the system/application can handle the expected number of transactions and to verify the system/application behavior under both normal and peak load conditions.

What is Volume Testing?

It is to verify that the system/application can handle a large amount of data

What is Stress Testing?

It is to verify the behavior of the system once the load increases more than its design expectations.

What is Scalability Testing?

Scalability testing is a type of non-functional testing. It is to determine how the application under test scales with increasing workload.

What is Concurrency Testing?

Concurrency testing means accessing the application at the same time by multiple users to ensure the stability of the system. This is mainly used to identify deadlock issues.

What is Fuzz Testing?

Fuzz testing is used to identify coding errors and security loopholes in an application. By inputting massive amount of random data to the system in an attempt to make it crash to identify if anything breaks in the application.

What is Adhoc Testing?

Ad-hoc testing is quite opposite to the formal testing. It is an informal testing type. In Adhoc testing, testers randomly test the application without following any documents and test design techniques. This testing is primarily performed if the knowledge of testers in the application under test is very high. Testers randomly test the application without any test cases or any business requirement document.

What is Interface Testing?

Interface testing is performed to evaluate whether two intended modules pass data and communicate correctly to one another.

What is Reliability Testing?

Perform testing on the application continuously for long period of time in order to verify the stability of the application

What is Bucket Testing or A/B Testing or Split Testing??

Bucket testing is a method to compare two versions of an application against each other to determine which one performs better.

What are the principles of Software Testing?

Testing shows presence of defects

Exhaustive testing is impossible

Early testing

Defect clustering

Pesticide Paradox

Testing is context depending

Absence of error fallacy

What is Exhaustive Testing?

Testing all the functionalities using all valid and invalid inputs and preconditions is known as Exhaustive testing.

What is Early Testing?

Defects detected in early phases of SDLC are less expensive to fix. So conducting early testing reduces the cost of fixing defects.

What is Defect clustering?

Defect clustering in software testing means that a small module or functionality contains most of the bugs or it has the most operational failures.

What is Pesticide Paradox?

Pesticide Paradox in software testing is the process of repeating the same test cases, again and again, eventually, the same test cases will no longer find new bugs. So to overcome this Pesticide Paradox, it is necessary to review the test cases regularly and add or update them to find more defects.

What is Defect Cascading in Software Testing?

Defect cascading in Software testing means triggering of other defects in an application. When a defect is not identified or goes unnoticed while testing, it invokes other defects. It leads to multiple defects in the later stages and results in an increase in a number of defects in the application.

For example, if there is a defect in an accounting system related to negative taxation then the negative taxation defect affects the ledger which in turn affects other reports such as Balance Sheet, Profit & Loss etc.,

What is Walk Through?

A walkthrough is an informal meeting conducts to learn, gain understanding, and find defects. The author leads the meeting and clarifies the queries raised by the peers in the meeting.

What is Inspection?

Inspection is a formal meeting lead by a trained moderator, certainly not by the author. The document under inspection is prepared and checked thoroughly by the reviewers before the meeting. In the inspection meeting, the defects found are logged and shared with the author for appropriate actions. Post inspection, a formal follow-up process is used to ensure a timely and corrective action.

Who are all involved in an inspection meeting?

Author, Moderator, Reviewer(s), Scribe/Recorder and Manager.

What is a Defect?

The variation between the actual results and expected results is known as a defect. If a developer finds an issue and corrects it by himself in the development phase then it’s called a defect

What is a Bug?

If testers find any mismatch in the application/system in testing phase then they call it as Bug

What is an Error?

We can’t compile or run a program due to a coding mistake in a program. If a developer unable to successfully compile or run a program then they call it as an error. Click here for more details.

What is a Failure?

Once the product is deployed and customers find any issues then they call the product as a failure product. After release, if an end user finds an issue then that particular issue is called as a failure.

What is Bug Severity?

Bug/Defect severity can be defined as the impact of the bug on customer’s business. It can be Critical, Major or Minor. In simple words, how much effect will be there on the system because of a particular defect.

What is Bug Priority?

Defect priority can be defined as how soon the defect should be fixed. It gives the order in which a defect should be resolved. Developers decide which defect they should take up next based on the priority. It can be High, Medium or Low. Most of the times the priority status is set based on the customer requirement.

Tell some examples of Bug Severity and Bug Priority?

High Priority & High Severity: Submit button is not working on a login page and customers are unable to login to the application

Low Priority & High Severity: Crash in some functionality which is going to deliver after couple of releases

High Priority & Low Severity: Spelling mistake of a company name on the homepage

Low Priority & Low Severity: FAQ page takes a long time to load

What is a Critical Bug?

A critical bug is a show stopper which means a large piece of functionality or major system component is completely broken and there is no workaround to move further.

For example, Due to a bug in one module, we cannot test the other modules because that blocker bug has blocked other modules. Bugs which affects the customers business are considered as critical.

Example:

1. “Sign In” button is not working on Gmail App and Gmail users are blocked to login to their accounts.

2. An error message pops up when a customer clicks on transfer money button in a Banking website.

What is the difference between a Standalone application, Client-Server application and Web application?

Standalone application:

Standalone applications follow one-tier architecture. Presentation, Business, and Database layer are in one system for a single user.

Client-Server Application:

Client-server applications follow two-tier architecture. Presentation and Business layer are in a client system and Database layer on another server. It works majorly in Intranet.

Web Application:

Web server applications follow three-tier or n-tier architecture. The presentation layer is in a client system, a Business layer is in an application server and Database layer is in a Database server. It works both in Intranet and Internet.

What is Bug Life Cycle?

Bug life cycle is also known as Defect life cycle. In Software Development process, the bug has a life cycle. The bug should go through the life cycle to be closed. Bug life cycle varies depends upon the tools (QC, JIRA etc.,) used and the process followed in the organization. Click here for more details.

[Click here for more details.](https://www.softwaretestingmaterial.com/bug-life-cycle/)

What is Bug Leakage?

A bug which is actually missed by the testing team while testing and the build was released to the Production. If now that bug (which was missed by the testing team) was found by the end user or customer then we call it as Bug Leakage.

What is Bug Release?

Releasing the software to the Production with the known bugs then we call it as Bug Release. These known bugs should be included in the release note.

What is Defect Age?

Defect age can be defined as the time interval between date of defect detection and date of defect closure.

Defect Age = Date of defect closure – Date of defect detection

Assume, a tester found a bug and reported it on 1 Jan 2016 and it was successfully fixed on 5 Jan 2016. So the defect age is 5 days.

What is Error Seeding?

Error seeding is a process of adding known errors intendedly in a program to identify the rate of error detection. It helps in the process of estimating the tester skills of finding bugs and also to know the ability of the application (how well the application is working when it has errors.)

What is Showstopper Defect?

A showstopper defect is a defect which won’t allow a user to move further in the application. It’s almost like a crash.

Assume that login button is not working. Even though you have a valid username and valid password, you could not move further because the login button is not functioning.

What is HotFix?

A bug which needs to handle as a high priority bug and fix it immediately.

What is Boundary Value Analysis?

Boundary value analysis (BVA) is based on testing the boundary values of valid and invalid partitions. Every partition has its maximum and minimum values and these maximum and minimum values are the boundary values of a partition. A boundary value for a valid partition is a valid boundary value. Similarly, a boundary value for an invalid partition is an invalid boundary value.

What is Equivalence Class Partition?

Equivalence Partitioning is also known as Equivalence Class Partitioning. In equivalence partitioning, inputs to the software or system are divided into groups that are expected to exhibit similar behavior, so they are likely to be proposed in the same way. Hence selecting one input from each group to design the test cases

What is Decision Table testing?

Decision Table is aka Cause-Effect Table. This test technique is appropriate for functionalities which has logical relationships between inputs (if-else logic). In Decision table technique, we deal with combinations of inputs. To identify the test cases with decision table, we consider conditions and actions. We take conditions as inputs and actions as outputs.

What is State Transition?

Using state transition testing, we pick test cases from an application where we need to test different system transitions. We can apply this when an application gives a different output for the same input, depending on what has happened in the earlier state. Click here for more details.

What is an entry criteria?

The prerequisites that must be achieved before commencing the testing process.

How to create defect in Jira?

login→ Click on Create ---->create issue window will open.

* Project (Mandatory picklist)
* Issue type (Mandatory picklist with values Task, Bug, Epic, improvement, new feature)
* Summary-- (Mandatory)---it is a text field we can enter title of the bug
* Reporter -- Mandatory
* Components --- picklist
* Description -- detailed way of expalnation of the bug like reproduceable sequence.,
* Fix versions
* Priority- high low medium
* Label
* Environment
* Affects versions: which version you are getting defect
* Linked issues
* Assignee
* Sprint

Enter the details click on create.

Defect will be created with open state.

Tabs available in JIRA!

Dashboards, Projects, issues, Tests, create issue.

Defect life cycle in jira

Dev lead can assign the defect to any developer

If the bug assigned to developer, he clicks on start progress then status of the bug will be in progress that means developer started working on it. Then he will click on the resolve issue button. Resolve issue window will open. In that following fields are available . \* means mandatory field

\*Resolution\* picklist--- Fixed, won’t fix, Duplicate, Incomplete, Can not reproduce, Done.

Fix versions

Assignee, assign back to tester who raised it

Time spent

Date started

Comment

Then click on resolve. Now status moved in resolved and resolution in fixed. Then click on the close issue to close the defect.

If it is not a valid defect developer enter comment and he will reject the defect by clicking on reject. Now status is in rejected state. If you are okay with the developer comments we can close the defect. Else if tester feels like it is a valid defect then tester can reopen the defect by clicking on Reopen button and provide some comments like “as per client req it is valid defect”. And attach some docs and assign back to the developer.

Developer accepts if it a valid defect then he can click on indevelopment button then it will come to inprogress state.

Once the build developed for the tester by the dev lead with the fixed defects and dev lead will move the status to ready for testing. And assigned to a tester.

Tester starts working on it.

If it is a valid defect and fixed. click on fixed and closed the defect.

In search click on the resolved list view. You can search all open , inprogress, reopened, resolved, closed, done, in review issues

MEETINGS IN AGILE SCRUM METHODOLOGY:

Sprint Planning Meeting:

Daily Scrum Meeting: (Daily Stand-up)

Sprint Review Meeting:

Sprint Retrospective Meeting:

When do we use Agile Scrum Methodology?

The client is not so clear on requirements

The client expects quick releases

The client doesn’t give all the requirements at a time

ARTIFACTS IN AGILE SCRUM METHODOLOGY:

User Stories: User Stories are not like a traditional requirement documents. In User Stories, stake holder mention what features they need and what they want to achieve.

Product Backlog: Product Backlog is a repository where the list of Product Backlog Items stored and maintained by the Product Owner. The list of Product Backlog Items are prioritized by the Product Owner as high and low and also could re-prioritize the product backlog constantly.

Sprint Backlog: Group of user stories which scrum development team agreed to do during the current sprint (Committed Product Backlog items)

Product Burn down Chart: A graph which shows how many Product Backlog Items (User Stories) implemented/not implemented.

Sprint Burn down Chart: A graph which shows how many Sprints implemented/not implemented by Scrum Team.

Release Burn down Chart: A graph which shows List of releases still pending, which Scrum Team have planned.

Defect Burn down Chart: A graph which shows how many defects identified and fixed.

Note: Burn Down Charts provide proof that the project is on track or not.

How will you test the batch process?

batch jobs, anonymous window

setup-->personal→ By using grant account login access, you may grant your administrator or support personnel the ability to login as you and access your data for one day 3 days etc.,

Enable Login access policies

|  |
| --- |
| Administrators Can Log in as Any User |