Data Security and Record Sharing

1. What is a Profile?

Profiles and Roles work together to determine which records users can see and what they can do with them. Profiles are always required and control which objects and fields users can access. They also determine whether users can create, edit, or delete records.

Read More: Salesforce Roles and Profiles (Feat. Permission Sets)

2. What is a Role?

Roles are technically optional, but it's a good practice to use them. Roles are predominately about sharing records to users. When organization-wide default sharing is set to lower than Public Read/Write for an object, you can use Roles in Sharing Rules to determine which records (and whether they're Read-Only or Read/Write) that users can view.

Roles also have a hierarchy like an organization chart, so that the sharing can cascade beyond records users need, but also for managers to access their team's records.

Read More: Data Security Trailhead module

3. What is a Permission Set?

Permission Sets are add-ons to Profiles. They generally have the same settings and are used to increase users' permissions above what the Profile provides. The benefit to them is that you can give users slightly different permissions without having to create separate Profiles.

They reduce the overhead for Administrators in that way. It's useful to think of Profiles as the base set of permissions that many users have in common while Permission Sets are the "extra" permissions that fewer users need.

Read More: Permission Sets help article

4. What is a Public Group?

Public Groups are similar to Roles what Permission Sets are to Profiles. An Administrator can create ad hoc groups of users (naming them individually or by Roles) to be able to share records to them.

A common use case is to share records to users of a similar level, say Directors. As there are probably Directors spread throughout the organization, they aren't likely to be under each other in the Role hierarchy, but an Admin could create a Public Group with all of the Director Roles in it and share records to the group.

Read More: Public Group Considerations help article

5. What is a Queue?

Queues are similar to Public Groups in that they are bespoke groupings of users (named individually or via Roles), but they are used for record ownership rather than Sharing Rules. The classic use is for Cases where you'd want to assign an open one to a team of people, so whoever was available first could handle it. Queues are not available on all standard objects, but they have been added to Tasks in the Spring '20 release.

Data Modeling

6. What is a lookup relationship?

A lookup relationship allows you to relate records to each other, creating a parent-child schema. Generally, this is done between the different objects (such as Accounts and Contacts), but it can be one object (such as Parent Accounts). Relationship fields allow for users to specify how records affect each other and help with reporting.

Read More: Guide to Salesforce Relationship Types – and When to Use Them!

7. What is a master-detail relationship?

Master-Detail relationships are similar to lookup relationships, but have a few special features. First, Master-Detail allows for Roll-up Summary fields to be created. This relationship type also affects security in that the Detail (or child) record does not have a record owner. It inherits its visibility from the Master (or parent) record. That can be very beneficial, or limiting, depending on your use case.

8. What is a Roll-up Summary field?

A Roll-up Summary field is available on the master side of a Master-Detail relationship. It allows administrators to aggregate data from related detail records (count them, sum a numeric value on them, etc.) in real time. Ability to have Roll-up Summary fields is the top reason why you'd consider a Master-Detail relationship.

Read More: Implement Roll-up Summary Fields Trailhead unit

9. What are different types of fields?

Field types define the type of information you expect users to enter for that field. Examples include Text, Number, Date, Currency, etc. It's important to match the field type to the data because it affects your ability to report on and analyze the data. For example, you *could* store numbers in text fields, but that would make performing calculations on them needlessly challenging.

Read More: Custom Field Type help article

10. What are Validation Rules?

Validation Rules allow you to enforce specific business logic to help with your org's data integrity. You can specify conditions on an object that aren't allowed to exist.

For example, if you don't want a user to mark an Opportunity as Closed Won if the Account doesn't have a Billing Address. You can add a Validation Rule so that when a user tries, it won't update the Opportunity record and displays an error message explaining what they need to do.

Read More: Create Validation Rules Trailhead unit

11. What if you need roll-ups on a lookup relationship?

Sometimes you'd like to aggregate child data on a parent record, but you can't use Master-Detail due to the security limitations not aligning with your use case. In those situations, you could write code or use Flow Builder to replicate the functionality of Roll-up Summary fields.

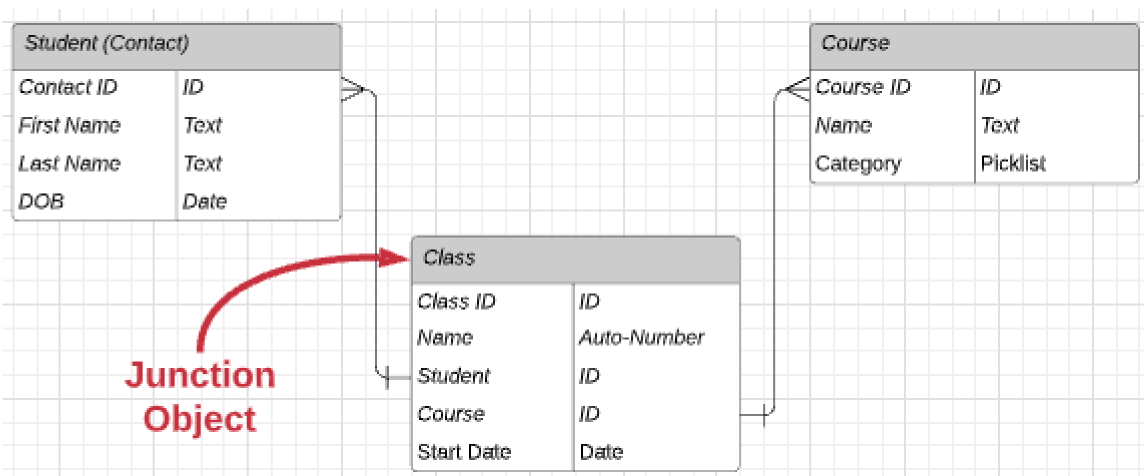
Most likely, however, you'll want an app from the AppExchange to make configuration easy. In fact, an app like this is one of the first things you should look to install in your org (in a sandbox first, of course.)

Read More: Rollup Helper or Declarative Lookup Rollup Summary (DLRS)

12. What is a junction object?

A junction object is a term to describe an object that is designed to have two different parent objects (generally with Master-Detail relationships) which forms a many-to-many relationship. There is nothing labeled "junction object" within Salesforce; it's a definition applied to an object based on its function in the data model.

A common use case is something like Classes in a school. The school will offer many Courses and have many Students. Each of those will be connected to many Classes.



Read More: Create a Many-to-Many Relationship help article

Process Automation

13. What is workflow?

Workflow is a basic automation tool that allows Admins to trigger an action (such as updating fields or sending emails) when a certain data condition exists. They are the simplest type of automation to implement and also the most limited.

Read More: Workflow Rules vs. Process Builder (Feat. APEX & Flow)

14. What is Process Builder?

Process Builder is a more advanced automation tool than Workflows. While still following the If This Happens, Then Do That concept, Process Builder allows Admin to control the order of actions as well as offering more actions such as creating records, posting to Chatter, and launching other automated tools.

15. What is a Flow?

Flow is the granddaddy of declarative automation tools. The logic required to perform actions is less rigid than the other tools, so you can do things like have branching decisions and looping through actions. You can also perform additional types of actions such as deleting records or creating/editing records unrelated to the original starting point.

Finally, Flow is the only declarative automation tool that allows admins to build custom screens to interact with users and can greatly improve the user experience in Lightning (which is required for Screen Flows.)

Read More: Process Builder Vs Flows – Become the Ultimate Admin

16. What is an Approval Process?

An Approval Process is for very specific automation use cases. Naturally, it's used when something needs to be approved and tracks when and who approved or rejected something. It covers notifying approvers, locking the record from edits, conditional logic for who should approve, and varied approval models (for example, all approvers or any approvers.)

Read More: How to Build Salesforce Approval Processes End-To-End

17. What is Apex?

Apex is the language in which Salesforce code is written. While a tool for Developers more than Admins, it's important to know that code can extend your org to do pretty much anything you need.

Read More: Apex Basics & Database Trailhead module

Communities

18. What is a Community (Experience Cloud)?

A Community is a way that you can allow your customers and partners to access your Salesforce org. With these special licenses, they can have user accounts and a special access portal, customized with a bevy of Lightning features that are able to be configured without any code. It's also very simple to layer in security so they can only see or edit the objects and records you want them to.

NB. Community Cloud was renamed to Experience Cloud

Read More: Experience Cloud Basics Trailhead module

19. What are Guest Users?

Guest Users are people without user accounts in your org. They are also called unauthenticated users because they don't need to log in. You can make pages (and data!) publicly available. These users can even create or edit records.

Naturally, there are a lot of considerations and limitations to evaluate, but leveraging this feature can solve a lot of use cases and do it economically as guest user licenses are free. Take a look at how the National Aquarium leverages guest users licenses to allow constituents to manage email preferences.
Read More: Guest User Profile help article

AppExchange

20. What is the difference between managed and unmanaged packages?

Applications you install from the AppExchange are in the form of packages — a collection of all of the elements required to make the app function correctly. The creator of the app decides whether the package is managed or not.
At a high-level unmanaged packages, once installed, behave like things you have created yourself in the org, whereas components of managed packages are locked down from being edited kind of like apps you install on your smartphone.

Attribute	Managed Packages	Unmanaged Packages
Customization	You can't view or change the solution's code or metadata.	You can customize code and metadata, if desired.
Upgrades	The provider can automatically upgrade the solution.	To receive an upgrade, you must uninstall the package from your org and then reinstall a new version from AppExchange.
Org limits	The contents of the package don't count against the app, tab, and object limits in your org.	The contents of the package count against the app, tab, and object limits in your org.

Chart source
Read More: AppExchange Basic Trailhead module

Change Management

21. What is a Change Set?

While not exactly the same as an AppExchage package, a Change Set is quite similar. It's a collection of components that you want to migrate between related orgs (generally from a sandbox to Production, but also sandbox to sandbox, and other configurations.)

Read More: Change Set Development Model Trailhead module

22. What are the different types of sandboxes?

There are Developer, Developer Pro, Partial, and Full sandboxes. The difference is what data is included in the sandbox when it is created or refreshed. The Developer ones have no data initailly (they differ in the amount of data it can contain) and the Partial and Full start with some or all of your Production data. It's important to note that they also differ in how often they can be refreshed: Developer daily; Partial every five days; Full every 29 days.

Read More: Sandbox Types help article

User Experience

23. What are Record Types?

Record Types allow you to create separate kinds of records for each object. They control the page layouts, picklist values available, and other business logic. A good example is a call center. You'd likely need different fields visible and required for Cases involving customers' mortgages compared to car loans.

Here's a tip: I almost always create a Record Type when I make create a new object even if I'm only planning to use one type. It's so much easier to add a second one when you need them than it is to to go back an introduce Records Types to an object that already has records.

Read More: When to use Record Types Vs Page Layouts?

24. What are List Views?

List Views are the queries you can present to your users to help them review they records that interest them. Most often found when they click on a tab in an app, but they could also be displayed in via Lightning Components on other Lightning Pages. List Views can be be filtered how they are needed and display whichever columns are relevant. Users can also pin their default List View on each tab.

Read More: Create and Customize List Views Trailhead unit

25. What are Reports and Dashboards?

Reports are similar to List Views, but they can do so much more. They can group records and create summaries. Dashboard allow for visualizations of the data.

Read More: Reports & Dashboards for Lightning Experience Trailhead module

26. What is a page layout?

At a high level a page layout controls which fields are visible for a specific record, but they control more than that. They can also control which fields or editable or are required. Additionally, page layouts control buttons, related lists, and some other elements too.

It's worth noting that now Dynamic Forms have been released, this will represent a paradigm shift in managing Lightning pages and page layouts!
Read More: Page Layouts help article

27. What are Lightning Components?

Lightning Components are where the magic of Lightning Experience really comes alive. They are modular features than can be added, moved, or rearranged on Lightning Pages. They are the Record Details, Chatter elements, Highlights Panel, Path display, etc. There are dozens of standard Lightning components and you can also create your own custom Lightning Components or get them from the AppExchange.

Read More: Lightning App Builder Trailhead module

28. What is the difference between a page layout and a Lightning page?

In Lightning Experience page layouts are basically represented by Lightning Components that display its content (mostly the Details and Related List components), but Lightning Record Pages house so much more!

The Lightning Page controls all of the other Lightning Components you can leverage. You can also make all of the components conditionally visible. The conditions can be based on things like the user's profile or data in the record.

There are other types of Lightning pages too: Home pages and App pages. Those pages won't have any individual records, but could enhance the user experience by containing things like charts, list views, Lightning Screen Flows, and more! The limit is almost anything you can think of to make things better for your users. You can even make Lightning Pages function differently between desktop and mobile instances.

Read More: Embed Dashboards and Report Charts on Lightning Pages Trailhead module

Data Management

29. What is the Data Loader?

There are a lot of ways to import and export data in bulk from Salesforce (including Import Wizard, exporting Reports, and third-party tools such as dataloader.io), but the Salesforce Data Loader is the original. It's a downloadable client application that is free and provides all of the options you need.

Read More:: Data Management Trailhead module

30. What is a Custom Metadata Type?

Once a tool primarily for Developers, Custom Metadata Types have increasingly become useful for Admins. Custom Metadata is kind of like a custom objects, but rather than store data *for* your organization, it's data *about* your organization.

Things like discount rates, blackout dates, sales goals, etc. are good uses cases. The metadata becomes available to you in formulas, automation, etc. Also, because it's metadata and not data, it's automatically available in all sandboxes you create or refresh.

Q1) What is Salesforce? Cloud computing and benefits?

Salesforce is a powerful CRM (Customer Relationship Management) tool that works on cloud computing technology.

Cloud computing: Technology in which the applications are hosted somewhere (simply called on the cloud) and users can access those applications from anyplace without installing it.

Cloud computing provides:

- Paas (Platform as a service)
- Raas (Recovery as a service)
- Saas (Software as a service)
- Maas (Maintenance as a service) etc.
- Iaas (infrastructure as a service).

In salesforce, we use only Paas and Saas. with Paas, a platform to code – you can develop your own application,

Eg: force.com. With Saas, you can use the application without installing anything on your computer

Eg: Salesforce.com.

Q2) What are standard and custom objects?

In simple Object refers to tables in database.

Standard objects are by default provided by Salesforce and uses don't have more control over it like sharing and other functionalities.

There are many standard objects available, few Examples are Account, contacts, Opportunities, Cases etc.,

Custom Objects are users created objects and the users have all levels of access to it.

To create a custom object go to,

Setup-> create->Object-> New custom Object.

Q3) What is MVC architecture?

There are many architectures available like Client server architecture, Standalone architecture etc., Salesforce uses MVC architecture i.e., Model View and Controller Architecture.

Model – It deals with Database designing like Table, fields creation, data types etc.,

View – It deals with UI (User interface) customization like Page layout, designing of the page etc.,

Controller- It controls the data flow between Model and view.

You can use Point and click tools like Workflow, approval process, process builder etc., to achieve the control or you can use Apex programming like Classes and triggers.

Design of Database,

Table, fields etc.,

Q4) What is governor limits and Multi-tenant Architecture?

Multi- tenant means shared by many. Since, Salesforce is a cloud tool and millions of users are using it at a time. In order to avoid mono-poly (influence of single or group of users) on cloud Salesforce provides limits for all functionalities and those limits are called Governor Limits.

Q5) What are fields in sales force?

In simple, fields refers to columns in database table.

Users enters the data inside the fields only. There are two types of Fields.

Standard fields – Once a object is created, four fields are created by default they are,

Name/number depends on the object.

- Owner
- CreatedBy
- Last ModifiedBy
- Custom fields – Custom fields are user created fields and we have various data types to be selected while creating a field. Some of them are, Text, number, phone, email, decimal etc.,

Q6) What is mean by field level security?

You can restrict access to the fields for the users using field level security. You can make a field required or read-only, hidden by using field level security.

Q7) What are page layout? Record types?

Page layout is a user interface customization. You can organize buttons, links, fields, related lists, visual force pages and quick actions etc., using page layout. To create a new page layout,

go to,

Setup-> customize\create-> objects->select an object->pagelayout.

You can customize the contents of a page for different users using pagelayout.

Record types: By default, you can have only one page layout per profile, if you want to have more than profile then you have to use record type. It provides different business processes, pick-list and page layouts for users.

Q8) What are roles in Salesforce?

Roles controls Records (RR). They are used to control records in salesforce. Each user is assigned with one role. No such configurations like profiles are required for roles. It works with Hierarchy but you need to setup hierarchy for roles.

To setup roles level hierarchy. Go to,

Setup-> Manage Users-> roles.

For example,

Top level role like manager can see all his bottom level roles records.

With Role hierarchy, manager role gets record level access for all his below user roles.

Q9) What are profile in Salesforce?

A basic requirement for a user creation is profile without selecting a profile user level creation is not possible as it is used specifies all the basic information\ permissions to object, fields, apps, tabs, apex class, visual force pages, record types, login hours, ip ranges.

A profile is a collection of permissions and settings for users in Salesforce. A user can have only one profile at a time but one profile can be assigned to any users.

To create a profile, go to,

Setup-> manage users-> profile->new profile.

Q10) What are Permission set in Salesforce?

A permission set is similar to profile as it is also used to provide permissions to users. If you want to give any specific permission to few users with same profile, then you can use permission set. Permission set is used to extend the permission for particular users with same profile.

Q11) What is sharing setting?

- In an organization, if a user record needs to be shared to other users then we can use sharing setting. The record can be set as private, public read-only or public read-write. The access are of two type, external access and internal access.
- If the external access is set a private, then the customers, portal users cannot see the objects records, they can see only their own account records.
- If the internal access is set a public read-only then internal user can view that user data.
- If the internal access is set a public read-write then they have full access to the records.

To manage sharing setting, go to,

- Setup->security controls-> sharing setting.

Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.

Q12) What are relationships in Salesforce?

A bi-directional association between two objects to establish link with two objects.

There are two major types of relationship in Salesforce

- One- to – many
- Many – to – Many

Apart from this we have self – relationship (creating a relation to that object itself)

These relationship can be achieved by

- Look-up relationship.
- Master –detail relationship.

Q13) What is a look-up relationship?

To establish a relationship between two objects to get the records from one object to another using look-up field. This relation is not so strongly bounded like master – detail. **You can have upto 40 relationship per object.**

Q14) What is master details relationship?

It is a very strong relationship between two objects. The child object (sharing of record\owner) is completely dependent on parent object. If the parent is deleted then all its associated child's will be automatically deleted. Roll-up summary is available in master detail relationship.

We can have maximum of 2 master detail relationship per object.

Q15) What is roll up summary?

A roll up summary is used to calculate the values of the child records and displays in the parent object as a read – only field. You can sum, count, minimum and maximum the values of the fields of child object.

Q16) What are reports and its types?

A report is a list of records displayed with certain criteria that users define. The records can be grouped, filtered and sorted based on requirements. We have 4 types of reports they are,

- Tabular format
- Matrix format
- Summary format
- Joined Format

T0 create a report we need to keep 5 things in mind.

- Report Type – (template, simply object or related objects that you want to create a report).

- Fields – fields in the objects you want to display in the report.
- Filters – we have many filters like Field filter, cross filter, row limit, logic filter.
- Format – Tabular, matrix, summary or joined format
- Folder – after creating a report you can save it in a public folder or you can create a folder.

Q17) What are Dashboards?

A Dashboard is the graphical portrayal of the information produced by a report or different reports. Dashboard part types can be graphs, tables, measures, measurements, or different segments that you can make with Visual Force.

Dashboard has two primary things, information source and segments

Information source is the report that you need to show graphically

Part is the kind of graphical portrayal like diagrams, table and so on.

We can have most extreme of 20 dashboard in a solitary dashboard board.

Q18) What is the workflow & approval process?

Work flow and approval process are simply point and click tools to automate your business logic without writing any code. When ever a record is inserted or updated in an object, you can perform certain actions using workflow rule.

The actions in work flow and approval process are,

- New task
- Email alert
- Field update
- Outbound message.

The main different between workflow and approval process is,

In Workflow, action is carried out based on the criteria the user has provided but in approval process the action is based on the approver.

The things to keep in mind while creating work flow is

Object – name of the object that you want to write workflow

Criteria – we have rule criteria and evaluation criteria

Action- choose any on the four action shown above.

In approval process we need to keep in mind,

Object – name of the object

Criteria – criteria if anything needed

Approver – approver has to be selected for approving the record, based on the approver only the action is performed.

Action – Select anyone from above four.

We can have up-to maximum of 10 actions in a single workflow.

Q19) What is process builder and difference between process builder and workflow?

A process builder is a tool to perform automation without code whenever a record is created or updated. It is similar to workflow but it has more advantages than work flow.

Using process builder, you can perform various actions like,

- Create a new record
- Post to chatter
- Update related record
- call a flow
- Call apex\ another process
- submit for approval
- Email alert
- Quick action

In workflow, we can only update records from child to parent but in process builder both child to parent and parent to child record update are possible.

We can have a control over order of execution using process builder.

Disadvantages:

• Even though process builder is very better than workflow but it has few disadvantages like

• Deleting a record is not possible.

• You can update a record in the objects that are in relationship.• Outbound message action is not available in process builder.

Q20) What are validation rule?........

Validation rules are used to validate the data based on the formula or criteria that a user provide. Before saving a record into the database, the validation rule checks whether the entered data is correct or not based on the user given criteria.

To create a validation rule, go to

Setup-> object-> click validation rule.

Q21) How to delete a user in Salesforce?

We cannot delete a user in Salesforce. However, we can inactive or freeze a user.

Go to,

Setup–>manage users–>select that user and click freeze or uncheck the check box active.

Q22) What are the ways to store images files and documents in Salesforce?

• We can store those data by,

• Libraries

• Notes and attachments

• Static resources

• Chatter files

• Documents

Q23) What is a static resource?

Static resources allows us to store the images, gif, css files, jave script, jar files and also in zip format that are used in visual force page. A single file should be less than 5MB and an organization is provided with maximum of 250 MB size.

Q24) What are data loader, import/export wizard?

• A import and export wizard are used to upload or download records from Salesforce. You can process upto maximum of 50,000 records at a time. If you want to process more than 50, 000 records then you can use data loader.

• In data loader you can process upto 5 million records.

• The only tool in Salesforce where you need to install in your pc to use it is data loader.

• If you want to perform more than 5 million records then you need to use some third party tools like apex data loader, jitter data loader etc.,

Q25) How the release in Salesforce works? What are the releases? What is AppExchange?

Generally, Salesforce has 3 major releases every year i.e., every four months once. They are

Spring – around the month of February.

Summer – around the month of june.

Winter – around the month of October.

AppExchange is the market place to get the managed packages(applications) for Salesforce. Similar like play store in android.

Q26) How to customize the Standard application Label & Logo in Salesforce?

We cannot customize the standard application label & logo. We can only customize the custom application log & label.

Q27) Can we change the assigned Custom object to Custom Object Tab once it got created?

There is no option to change the object that is assigned to tab once it got created.

Q28) In many-to-many relationship, in which scenario user can’t delete a parent Record?

Parent record is having more than 200 junction record associated with it.
Junction record which is associated with this parent record is having rollup summary field that rollup to another parent.

Q29) How to make Login Button visible in User Account page?

By enabling “Grant Login Access” for particular user. We can see “login” button under user detail page of that user.

Q30) Why we create Connected App in Salesforce?

Connected App is created in situation where external application wants to connect with our salesforce organization.
Example: When external application wants to make Rest Call to Salesforce Org.

Q31) What happens to related opportunity when associated Account is deleted?

Account & Opportunity relationship acts as master detail relationship in backend.
So when Account record is deleted associated opportunity record is also got deleted.

Q32) How many login history records we can track using Login History in Setup?

We can track 20000 records of last six month login history.

Q33) If a user grants login access to an admin and the admin makes a setup change, how we can track it?

In setup, we can download setup audit trail, where we can see the user name who made the changes in Delegate user columns.

Q34) How to set name that will appear on your outgoing Email from Salesforce?

Go to Email setting from the My Personal information and set outgoing Email Name.
By setting this value, any outgoing Email from Salesforce org will have this name associated with Email id.

Q35) How to prevent deletion of Parent record if there is related child record present in lookup relationship?

While creating lookup relationship, we can define this under “what happens when parent record gets deleted” section.

Q36) Can we set Default value for controlling picklist?

We can set default value for controlling picklist but not for dependent picklist.

Q37) When we convert existing picklist to controlling or dependent picklist what happens to the existing record?

When we convert existing fields to dependent picklists or controlling fields, it doesn’t affect the existing values in your records. After conversion, the dependency rules apply to only new records and to any changes to existing records.

Q38) Can user who don’t have “View Encrypted Data” permission edit the Encrypted field?

Encrypted fields are editable regardless of whether the user is having the “View Encrypted Data” permission.

Q39) Can we create Detail Record in Master Detail Relationship without associating master Record?

No. We can’t create detail record without associating master record. One master record can be associated with multiple child.

Q40) What are the fields are available when you select sum as the roll-up type?

Integer, Currency, Percentage

Q41) What are the fields can be inserted into formula editor while creating formula field?

Global Variable, Hierarchical Custom Setting, Objects and related parent objects.

Q42) What is the functions which is used in Validation Rule for checking whether newly created record or not?

ISNEW function is used to check whether record is newly created or not.

Q43) How to assign the particular record type case to particular owner automatically without using Assignment Rule?

We can create workflow rule and define every time record is created.
Give criteria using record type and use field update action for updating owner field.

Q44) Can we access Related Records fields using Workflow Rule?

We can only access and update parent record fields if it is in master detail relationship.

Q45) How to send message to External system from salesforce upon updates to salesforce Records?

We can create workflow rule on particular object.

Give required condition for triggering the workflow rule.

Add Send outbound message action for sending message to external system.

Q46) What happens to the record which is pending to execute in Time Based workflow Queue when record is changed from meeting criteria to not meeting criteria?

Pending action is removed from timed based work flow queue. It will not get executed.

- How to make currently assigned approver to edit the record once it is submitted for approval Process?
  - While creating the approval process we can enable this permission.
- How to edit the System Administrator Profile?
  - We can’t edit the system administrator profile. If there is requirement for that, we can clone the existing system administrator profile.

Q47) In one Profile, For Custom object Student__C edit permission is not given. How can we enable edit permission for only 3 user in that profile without modifying the Profile?

For extending the permission that we gave in profile, we can use permission set. We need to create new permission set and give edit permission and add those user to this permission set.

Q48) What are the Report Formats is available for creating Dashboard?

Summary and Matrix Report. Tabular and join report is not available for creating dashboard.

Q49) Give me the Scenario where we need to create Custom Report Type?

Scenario where we need to create entirely new report type by adding objects and specified fields.

Q50) User A wants to give edit permission for his Case Record to User B (Who is having only Read Permission), how User A can give Edit permission to User B?

Manual Sharing

Q51) Can we modify “Grant Access Using hierarchies” feature of Standard object?

No we can’t modify for standard object. We can only modify for custom object.

Q52) In OWD, Case object sharing setting is Private. How to enable Edit permission for only Specific Profile Users?

Sharing Rule

Q53) How to make the field required in the UI Level and not required in the API or Code level?

Enable field required in page layout level.

Q54) Profile associated with user is having Edit permission for case object. But we need to restrict the user from editing the case records. How we can achieve this?

We can create validation rule and validate by using user id.

Q55) Can one queue have another queue as a Member?

No. We can't add one queue into another queue. But one public group can have another public group.

Q56) Can Public group owner of the Record?

Public group can't be direct owner of the record. We can add public group to queue and queue can be the owner of the record.

Q57) How to show different picklist values to two different profiles?

Create a different record type and assign different picklist values.

Q58) How to restrict the user from logging in from specific IP Address?

We can add IP address in profile level. So those profile can only login to org specified in the IP address specified at their profile level.

Q59) How to extract the string that is present after "@" in email field and store in different field of same record. How can we achieve it using salesforce declarative approach?

Create Formula field in salesforce and achieve it by using substitute, left and Find function.
SUBSTITUTE(Email, LEFT(Email, FIND("@", Email)), NULL)

Q60) What happens when we add IP Address range in Trusted IP Address?

Trusted IP Ranges define a list of IP addresses from which users can log in without receiving a login challenge for verification of their identity, such as a code sent to their mobile phone.

Q61) I have one requirement where all users in salesforce Org has to send mail using same From Address in the Email. This from Address should be available to all users in org when they send any email from salesforce. How can I achieve this?

For this requirement, you can define a organization-wide addresses for all user profile.

Q62) I contacted salesforce for clarifying some challenges that I face in my org. Salesforce team is asking for Org id. How I can find out?

Setup à Company information à Org id

Q63) What is the different between transferring the record using mass transfer and sharing the record using sharing rule or manual sharing?

While transferring the record ownership of the record gets changed. But while sharing the record ownership is not changed, we are just giving permission to other users on our record.

Q64) While importing data using data loader whether it follows allornone approach?

Data loader doesn't use allornone approach. If one record gets failed in 100 records, remaining 99 records will get processed.

Q65) When manual sharing button is visible to user in Record Detail Page?

We have to enable it in OWD sharing setting. OWD for object should be private/public readonly.

And it should pass any of the below condition:

Administrator, Record owner, User above in role hierarchy of record owner, User granted with full access sharing.

Q66) How to create new field that is used for categorizing based on existing record field values and it should be available only in report and not in object definition?

Use bucket field for categorizing. It will be only available in Report.

Q67) When user clicks on the link available in the Detail page, it should redirect to Edit page of the record. How we can implement this. ?

We should not use standard Edit button for redirecting to Edit page of the record.

Q68) We have one text field with more than 255 characters. Field tracking is enabled for that. User updates that field to new value. Can we see old and new value in Field History?

Any Changes to fields with more than 255 characters are tracked as edited, and their old and new values are not recorded.

Q69) Is there any option that is available in salesforce for arranging the picklist values alphabetically?

After adding the picklist value in Salesforce. We can arrange it using Arrange picklist values alphabetically in Picklist Field Definition Page.

Q70) Whenever opportunity record is created or edited with amount greater than 10,000. Salesforce has to automatically send mail to specific group of recipients. How can we achieve this?

Create Workflow Rule with Evaluation criteria "every time record is created and edited to subsequently meet the criteria" and add Rule criteria opportunity amount >= 10000.

Add Send Email Alert action for sending the mail and add Email template for formatting the Email.

Q71) What is the difference between deactivating and freezing the user?

When we freeze the user, user loses all permission. User won't be able to login to salesforce. But still License is assigned to the user.

When we deactivate the user, license also removed for that user.

Q72) What is the difference between Export and Export All in Data loader?

Export doesn't takes data from Recycle Bin. But Export all takes data from Recycle pin as well.

Q73) What are the fields can be used for mapping while upserting the record in Salesforce?

Salesforce id or field with External id can be used for mapping while upserting the record in salesforce.

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1. What is Cloud computing?

"Cloud Computing is a new trend in IT development, deployment, Delivery module of business Products, Services that are provided over the internet that are been used by the real time User**"**

- Read more on Cloud Computing => **What is Cloud Computing.**

2.Expand CRM and briefly explain about CRM ?

Full form for **CRM** or Acronym for **CRM** is "**Customer Relationship Management ".** We can understand from the full form where **CRM** is an application used to automate Sales and marketing functions by a using a Software called **CRM Software** . BY using **CRM Software** every Company / Organization plans to increase their revenues and profits. This strategy of increasing revenue is done mainly by attracting Customers, clients, Sales etc.

- Read more on CRM :- **What is CRM.**

3. List some CRM Software's?

We have number of CRM softwares which are provided by top CRM companies some of them are listed below depending upon their present market.

1. Salesforce CRM.
2. Microsoft Dynamics CRM.
3. Oracle CRM.
4. SAP CRM.

5. Sage CRM.
6. NetSuite CRM.
7. Oracle CRM on Demand.
8. Oracle Sales Cloud(Fusion CRM).
9. SugarCRM.
10. Nimble

4. What are the Advantages of Cloud Computing?

- **Cloud computing** has made tremendous growth in ***processing power, reliability of the Internet and the great increase in broadband speeds.***
- It makes tremendous sense to make use of the centralized server of the provider of **cloud computing services** as not only does it reduce the costs by a great extent by making redundant the need to buy several software licenses, it also eliminates the huge costs required by an organization to maintain and upgrade existing software.
- Read more on Cloud Computing Advantages :- **Cloud Computing Advantages.**

5. What is the definition of CRM?

"Cloud Computing definition given by NIST **(US National Institute of Standards and Technology)** : **Cloud Computing** is a model for enabling ubiquitous, convenient, on-demand network access to a shared pool of configurable computing resources that can be rapidly provisioned and released with minimal management effort or service provider interaction**"**.

6.What are deployment modes of cloud computing?

Cloud computing services can be provided in four different deployment modes depending on size and structure of an organization. Four deployment modes of cloud computing are

1. Public Cloud.
2. Private Cloud.
3. Hybrid Cloud and
4. Community Cloud.

7. What is PaaS?

PaaS means" **Platform as a Service".** Here in "**PaaS "** the cloud service providers provides hardware, OS(operating System), Storage, Network services over the cloud. It is the way like a rent. If there is no service like Platform and there will be no Applications. Which applications are build on a Platform.

Get more details on Paas :- **What is PaaS.**

8. What is SaaS?

SaaS means Software as a Service. Through this Services all the software's are distributes over the cloud. By using SaaS no need to install any software all software's are readily available over the internet .

- Get more details on SaaS :- **What is SaaS.**

9. What is IaaS?

Full form IaaS is "Infrastructure as a Service". Here in IaaS the cloud service providers will provides infrastructure like servers, hosting services and storage. Servers and storage's are the basic services provide by Cloud Service Providers**.**

- Get more details on IaaS :- **What is IaaS.**

10. What is Public Cloud?

Public cloud can be available to people across the world. In this Public Cloud the user has no control over the resources.

11. What is Private Cloud?

Private Cloud Can be accessed only with in the limited premises. In **Private cloud** Cloud Services Providers Cloud infrastructure to particular Organization or Business specially. This Cloud infrastructure is not provided to others.

13. What is Hybrid Cloud?

Hybrid Cloud is the combination of number of clouds of any type but the cloud has the ability to allow data and / or applications to be moved from on cloud to another cloud. Hybrid Cloud is a combination of (**Public Cloud ,Private Cloud, Community Cloud**). Here API is used as an interface between public and Private Cloud.

14. What are the different types of Cloud Service providers?

Cloud Service Providers are those who provide cloud services to the business and customers or consumers. Cloud Service providers will have huge data base, Data centers, infrastructure, software's, platform and hardware systems.

- Get more details on Cloud Service providers :- **Different Cloud service providers list.**

15. Difference between Public and Private Cloud?

Public cloud can be available to people across the world. In this Public Cloud the user has no control over the resources. Where **Private Cloud** Can be accessed only within the limited premises. In **Private cloud** Cloud Services Providers Cloud infrastructure to particular Organization or Business specially. This Cloud infrastructure is not provided to others.

16. Salesforce.com is based on which cloud computing Service ?

Salesforce.com is based on Software as a Service (SaaS).

17. What are common factors on SaaS, PaaS, and IaaS?

SaaS, Paas and IaaS are the three types of services provided using **"cloud"**. Their common factor for providing services to organization and customer is the **"CLOUD"**depending upon the types of the service they need. Saas provides Software service on cloud where PaaS provides Platform for application development and finally IaaS provides Infrastructure.

18.What is Salesforce?

Salesforce is one of the best customer relationship management (CRM) tool. Salesforce is among one of the best web based flexible and powerful database provider available in the market.

Get more details on Salesforce :- What is Salesforce.

19.Different Salesforce Editions?

Salesforce.com provides different types of editions and features depending upon the cloud. For Sales cloud it provides four different types of editions. They are

1. Group.
2. Professional.
3. Enterprise.

4. Unlimited.

20.Number of Salesforce Editions released per year?`

Salesforce Releases e updates for every year. They are

1. Spring.
2. Summer.
3. Winter.

21.Difference between Salesforce.com and Force.com?

Salesforce.com and fore.com are relatively same but they are different in their functionality. Salesforce.com is used to develop CRM functionality based application where force.com is used to customize our data model, business logic and User interface

22.What is Database.com?

Database.com is a type of service provided by Salesforce.com to enhance the power of Salesforce.com CRM applications. Database.com provides “Data as a Serivce” to subscribers.

23.How many types of portals are available in Salesforce?

In Salesforce.com we have three types of portals. They are

1. Customer Portal.
2. Partner portal.
3. Self Service portal.

24. What is App in Sales force?

App means an Application. In Salesforce an Application consists a group of tabs which are designed to work as a single function. We have number of applications in Salesforce.com some of them are sales, marketing, chatter, site.com, work.com etc.

We can create new application and also customization for the existing apps in Salesforce.com. To create new app in sfdc go to **Setup=>Build=>Create=>App.**

25.Different types of object in Salesforce.com? And why they called so?

In Salesforce.com we have two types of objects. They are

1. Standard objects.
2. Custom Objects.

- Standard Objects :- Standard objects are called so because they are created and provided by Salesforce.com.
- Custom Objects :- Custom objects are those which are created by an User in salesforce.com.

Get more details on Salesforce objects:- Objects in Salesforce

26.What is an object in Salesforce?

An Objects is represented as a database table which stores organization data . **Objects** consists of set of **fields** and we store data against that field. To view data **Salesforce** provided **TABS**.

To create custom fields go to **Setup=>Build=>Create=>Object.**

27.What is TAB in Salesforce?

Salesforce.com provides list of tabs and are placed in Tab menu. To access data of an objects Tabs are used. Tabs in Salesforce are three types they are.

1. Custom Tabs.
2. Visualforce Tabs.
3. Web Tabs.

28. List examples of custom field types?

Some of the custom field types are date field, Date/Time field, Currency field, Checkbox field, Number field, Text field, Pick list field, Email field, percent fields, phone field, Url field and many more.

Learn how to create custom fields :- Custom fields.

29.What are the Standard and Custom Fields in Salesforce?

- Standard fields for custom objects stores the information about created by, modified by, currency, Name, owner and Division. These are the standard fields in Salesforce.com.
- Custom field for custom objects store unique data or information of an organization.

30. How many custom fields can I created in an object?

In Unlimited edition we can create up to 500 fields per object. In professional edition we can create up to 100 custom fields per object.

31. What is a profile?

Profiles are those which defines user’s to perform different functions like settings and permissions in salesforce. It is another way to restrict or control access to a particular record.

Profile are of two types.

1. *Standard Profile*.
2. *Custom Profile*.

- **Standard Profile** : Profiles created by force.com are called Standard Profiles.
- **Custom Profiles** :Profiles created by user are called Custom Profiles.

32. What is Role ?

Role Hierarchy settings make the **managers and subordinates** to **edit, and view the records**. The users in the Hierarchy can be able to **view, edit and report** all the data shared.

To create roles in salesforce go to **setup=>Administer=>Manage Users=> Roles.**

33.Difference between Role and Profile?

Roles :- Using we can provide record level access like organization wide defaults, Role hierarchy, sharing rules and Manual sharing. Simply roles influences record level access.

Profiles :- Using profile object level and field level access can be made like general permissions, tab level permissions, read & write permissions etc.

34. Number of standard profiles available in Salesforce.com?

In salesforce we have 6 standard profile they are.

1. Standard user.
2. Solution manager.
3. Marketing User.
4. Read only.
5. System administrator.

35. How can you use the term “Transfer Record” in profile?

Transfer record is a type of permission in salesforce. If a user is is given access to transfer a record then the user will have the ability to transfer the records which have Read access.

36.Tell me about Company Profile?

In salesforce.com company profile consists of information about language, locale, time zone, number of licenses, storage and available space, about fiscal year, address and currencies.

37.How to get security token in Salesforce.com?

To get security token in salesforce.com go to **your name=>Personal=>Reset my Security token.**

38.What is a Fiscal Year in Salesforce?

Fiscal years in Salesforce are used to define starting and ending date of an organization financial year.Fiscal years in salesforce are two types they are.

1. Standard fiscal year :- To change starting month of the fiscal year this type is used.
2. Custom fiscal year :- We can set custom fiscal year dates like quarters, weeks.

39.What is a dependent picklist?

Dependent Picklist allows to contain multiple values and pick value one among them or Multiple values among them. Dependent fields depends upon controlling field.

Read more about dependent Picklist :- Dependent picklist.

40.What is Page Layout and Record Types?

- **Page Layout** :- In page layout customization can be done like fields, related lists, custom links can be arranged.
- **Record Types** :- Record types in salesforce helps to implement business processes like defining picklist values for standard and custom pick lists.

41.How to delete user from Salesforce?

In salesforce.com, deleting a user is not possible. But the user can be deactivated by freezing that user in salesforce. To deactivate user go to **Setup=>Administer=>Manage users=>Users=>Click on Freeze.**

42.How to freeze users in salesforce.com?

In salesforce.com, deleting a user is not possible. But the user can be deactivated by freezing that user in salesforce. To deactivate user go to **Setup=>Administer=>Manage users=>Users=>Click on Freeze.**

43.In how many ways can we store files, images and documents in salesforce.com? what are they?

In Salesforce.com we can store files, images and documents in 5 types they are.

1. Attachments.
2. Documents.
3. Google drive.
4. Libraries.
5. Chatter Files.

44.What are Static Resources?

Static resources helps to store upload images, files, zip files, documents, javascript files, Css Files which can be used in visualforce pages. Maximum data storage limit for static resource is 250mb.

45.List some standard indexed fields in salesforce.com?

Id, name, owner fields, lookup fields, master-detail relationship fields, audit dates like Last Modified dates etc are the standard indexed fields in Salesforce.com.

46.Which fields are Indexed by default in Salesforce?

Salesforce indexed some fields by default they are Id, name, owner fields, lookup fields, master-detail relationship fields, audit dates like Last Modified dates.

47.Which fields cannot be added as a custom Index?

Formula fields.

48.In salesforce, Can two users' can have same profile?

Yes.

49.Is it possible to edit formula field values in a record?

No.

Salesforce interview Questions on Security

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50. What is a Sharing Rule?

Sharing rules in Salesforce represent the permissions and exceptions to your organization. By using sharing rules we can grant access to edit, read, read/write permissions to user. Sharing Rules are of two types. They are

1. Manual Sharing.
2. Automatic Sharing.

51. What is Manual Sharing?

Manual sharing is the process of sharing records manually.

52. What is permission set?

Permission sets in salesforce.com are the combination of different settings and permission sets given to user to access records and files.

Note :- Manual sharing is available for only Organization wide default settings are private to the object.

53. Difference between profiles and permission sets?

Permission Sets : In this Permission sets we define the access level of the user. Generally we determine what a user can do in the applications. These are used to grant additional permission to a user.

Profiles : In Object level Security, Profiles are assigned to the user by system administrator. A profile can be assigned to many users where as a user can have only one Profile.

54. How can you define Field Dependency?

In Field dependency, we have to fields controlling filed and dependent field. When a selection is made the controlling field controls dependent picklist values.

Ex:- When a country is selected in dependent picklist then the states are available to that country. Here country is controlling field and State is dependent field.

55. How many field dependencies we can use in Visual Force page?

We can use up to 10 field dependencies in visualforce pages.

56. Tell me about Field-Level Security?

In field level security, we control the user what to see, edit, delete of a particular field in the object.

57. Briefly describe about Field-Level Security?

In field level security, we control the user what to see, edit, delete of a particular field in the object. In some situation like if we want to grant access control over Object to a user but the user should not be able to access some particular fields in that objects then we go for **Field Level Security**.

Field Level Security can be controlled by Profiles and Permission sets.

= > Profiles.

- Page Layouts.
- IP Ranges.
- Login Hours.
- Desktop.
- Client Access.

= > Permission sets.

- App Permissions.
- Record Types.
- Tab Settings.
- Assigned Apps.
- Object Permissions.
- Field Level Security.
- Apex Classes
- Visual Force Pages

58. What are Login Hours and Login IP Ranges?

- Login hours are set in an organization to restrict the user's who tries to login before or after login hours.

To set login hours in an organization go to **Setup=>Administration=>Manage users=>Profiles.**

- IP ranges are used to restrict any login attempt is done from unknown IP addresses. Usually organizations maintain login IP ranges.

To set Login IP ranges in salesforce go to **Setup=>Administration Setup=>Manage Users=> Profiles**.

59. What is a User Record?

User records consist key information about the user.

60. What is a Record Owner?

Record Ownership : The User or Queue who controls and have the right to access a record.

Generally there are two types of Owners. They are

1. Users.
2. Queues.

61. What are Organization Wide Defaults?

- **Organization wide Defaults** define the baseline level of access to data records for all users in an Organization.
- **Organization wide Defaults** are used to restrict access to data(Records).
- **Organization wide Defaults**(OWD) can be defined for Standard Objects and Custom Objects.

62. What is a Role and Role Hierarchy?

Salesforce uses role hierarchy to automatically to grant access to users by default. We can not edit Grant Access using Hierarchies for standard objects and can edit Grant Access using Hierarchies check box for Standard objects.

63. What is Access at the Role Level?

Access at the role level depends upon the organization wide defaults.

64. What are the different types of Sharing Rules in Salesforce and explain them?

1. Account sharing Rule.
2. Contact Sharing Rule.
3. Case Sharing Rule.
4. Opportunity sharing Rule.

5. Lead Sharing Rule.
6. Custom Object sharing Rule.

65. In how many ways can we share a record?

Records can be shared in 5 types they are

1. Role Hierarchy.
2. Organization Wide Defaults.
3. Manual Sharing.
4. Criteria Based Sharing Rules.
5. Apex Sharing.

66. Best Practices of Creating Contact Sharing Rules?

Organization wide default settings are used to set red, write, read/write permissions

67. How can i provide record level access to user's in an organisation? then what should i use from Salesforce security model?

Get more details on record level security :- Record level security in salesforce.

68. If i want Object level accesses then what should i use from Salesforce security model?

Get more details on object level access. Object Level Security in Salesforce.

69. What are governor limits?

Governor Limits in Salesforce.com are the run time limits enforced by the apex runtime engine to write scalable and efficient code.

Read more on Governor Limits :- Governor limits in Salesforce.

70. Is it possible to bypass Grant Login access using Hierarchies in case of standard objects?

Yes

71. Can we use sharing rules to restrict data access?

No, sharing rules cannot restrict data access.

72. Is it possible to create sharing rules for detail object?

No, we can create sharing rules for details objects because they don't have owner field.

73. How can you change the setting "Grant Access Using Hierarchies" for Standard Objects ?

It is not possible , by default Grant Access Using Hierarchies options are enabled for standard objects and they can not be changed.For custom objects we can change **"Grant Access Using Hierarchies "**settings .

74. What are the Mandatory points that you think while creating User and Role ?

It's Profile.

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

No, we can not change the settings of child record in Master Detail relationship because child record is controlled by parent record.

76. Number of accesses available in Organization Wide Defaults and what are they?

We have 13 types of access in Organization default settings. They are

1. Private
2. Controlled by parent
3. Public Read Only.
4. Public Read/Write.
5. Public Read/Write/Transfer.
6. Public Full Access.
7. Use.
8. No Access.
9. View Only.
10. Hide Details.
11. Hide Details and Events.
12. Show Details.
13. Show Details and events.

77. In Partner Community, external user is having appropriate OWD and Profile Settings for Opportunity or consider any other Object. However they are getting insufficient privilege access, what might be cause of this error ?

1. First check that every field used in report has Field level security for external users.
2. Check whether Standard Report Visibility settings are enabled, if it is enabled user can be able to see reports which are based on standard report types.
3. Now external user can be able to access sensitive information of internal user.

Salesforce Interview Questions on Relationships

78. What are the different types of Relationships in SFDC?What are they?

They are four types of Relationships in Salesforce.com. They are

1. Master-Detail relationship.
2. Look-up Relationship.
3. May-Many Relationship.
4. Hierarchy Relationship (we can not use this relationship).

79. What is a "Look-up Relationship"?

- No parent is required.
- Relationship is optional.
- No impact on Security.
- Roll-Up summary fields cannot be available.
- 25 look-up relationships can be created to one Object.

80. What is "Master-Detail Relationship"?

We create Master-Detail Relationship using Junction Object in Salesforce.

- Child record must have a associated parent.
- Cascade record-level security.
- Cascade record deletion.
- Roll-up Summary fields can be established.
- Standard objects can not be a detail object.
- Standard Objects can be a Master object
- Maximum 2 Master-Detail Relationships can be created to a Object.

- Records can be re parented.

Get more details here :- Master-Detail Relationship

81. What is a “Self Relationship”?

Self Relationship is nothing but creating relationship between two same objects. This Self Relationship is a Look-up Relationship to the same object.

82. What is Roll-up summary?

Roll-Up Summary field in salesforce calculates values from a set of related records.

83. Define various characters of Roll-up Summary Field?

1. Roll-Up Summary field can be created only in a object which is referred as a object with a master detailed relationship field.
2. Roll-Up Summary field can only created for Master-detail Relationship.
3. Roll-Up Summary field can not be created for Look-up Relationship.
4. It Derives the data from child Object.
5. We can’t change field type of a field that we reference in a roll-up summary field.
6. Auto numbers are not available here.
7. Roll-Up Summary fields are not available for mapping lead fields of converted fields.

84. List out the functions of Roll-up Summary field ?

- Count : It calculates the total number of related records.
- Sum : It totals the values of selected fields.
- Min : Displays lowest value.
- Max : Displays the highest value.

85. What is Many-Many Relationship in Salesforce ?

- Many-Many Relationships between two objects can be created.
- Junction Object is used to create Many-Many Relationship.
- Junction object can also be called as Join Object.
- Junction Object links each objects in Many-Many Relationship.

86. How to create Roll-up summary field on look-up relationship?

https://www.salesforcetutorial.com/how-to-create-roll-up-summary-fields-in-salesforce/

87. Can we have Roll up Summary fields in case of Parent-Child Relationships?

No.

88. Is it possible to edit Roll up summary field value in a record?

No. roll up summary fields are read only fields and they can not be edited.

89. Is it possible to create Roll up summary field on parent object ?

Yes, we can create Roll up Summary field on parent object only with master detail relation between objects.

90. How to create Many – to – Many relationship?

https://www.salesforcetutorial.com/many-to-many-relationships-in-salesforce/

91. What is Junction Object?

In salesforce, **Junction Object** are the part of the objects which joins one object to another. These are specially used to join many objects in **Many to Many relationships**.

92. What are the main things need to consider in the "Master-Detail Relationship"?

Cascade deletion of the child records is done when parent record is deleted in Master-Detail Relationship.

93. Can we convert the look up relationship to Master Detail relationship? If so How can we convert?

Yes, we can convert Look-Up relationship to Master-Details Relationship. Conversion can be done only if all the fields have valid look-Up fields values only.'

94. Can we create Master Detail relationship on existing records?

Yes, It is possible to create Master-Detail Relationship on existing record. First we have to create Look-Up relationship to a record then convert it to master-Detail Relationship.

95. How to create many to many relationships between two objects?

Many to Many Relationship can be created using Junction object.

Learn how to create Many to Many Relationship in Salesforce.

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

No

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

Yes, we can updatethe field of Parent record using workflow rule.

98. What happens to detail record when master record is deleted?

When master Record is deleted, it's detail records are also deleted.

99. What happens to child record when a master record is deleted in Look-up Relationship?

Child records are not deleted.

100. A custom object contains some records, now my requirement is to create field in this object with master detail relationship.

No. we can no create master detail relationship first create look up relationship and associate look fields for every parent record and then convert this to Master detail relationship.

101. Can we create both master detail relationship and Look-Up Relationship at a time ?

Yes, we can create.

Salesforce Interview Questions on Reports & Dashboards.

102.What are different kinds of reports?

There are three types of reports in salesforce.com they are

1. Tabular reports.
2. Summary reports.
3. Matrix reports

103.What are Standard Reports?

Standard reports in salesforce are those provided by salesforce.com. These type of reports can not be deleted and used primarily for creating custom reports.

104.What are custom Reports?

Custom reports in salesforce are those created by user with specific criteria. These type of report can be deleted, edited and stores in personal folders.

105.What is a Tabular report ?

Tabular reports in salesforce are those where the data is displayed in the form of list. In Tabular reports custom data is arranged with out subtotals.

106.What is a Summary Report?

Summary reports in salesforce are those where the data is displayed in the form of summary format. Sorting, sum-total of data can be available in this report.

107.What is a Matrix Report?

Matrix reports is salesforce are those where the data is arranged in grid format having rows and columns. Data is arranged vertically and horizontally in tables like excel format.

108.What is Trend Report?

Trend reports in salesforce are those which displays historical data. Trend reports are used to analyse which fields contains data that we want to leave out.

109.What are Custom Report Types?

Custom report types in salesforce allows us to build framework in the report wizard when creating custom reports. This custom reports can be created between standard and custom objects.

110.Who can run Reports?

In Salesforce.com, most reports run automatically when we click on the report name. If we want to run a report click on **"Run Report"** to run automatically.

111.What is a bucket field in reports?

In salesforce reports, bucket fields are used to categorize reports records . When we use bucket field in reports there is no need of creating formula or a custom field.

112.Is it possible to delete reports using Data loader?

No, it is not possible to delete reports using data loaders.

113.What are Dashboards?

Salesforce Dashboards are the graphical representation and visual presentation of reports data in salesforce.

114.What are the different Dashboard Components?

Salesforce dashboard components are used to represent data. Salesforce dashboards have some visual representation components like graphs, charts, gauges, tables, metrics and visualforce pages. We can use up to 20 components in single dashboard.

115.What are dynamic Dashboards?

Dynamic dashboards in Salesforce displays set of metrics that we want across all levels of your organization. Enterprise Editions can use five dynamic dashboards and Unlimited edition can use ten dashboards.

Read more on Dynamics dashboards : **https://www.salesforcetutorial.com/creating-dynamic-dashboards-salesforce/**

116.Can we schedule dynamic dashboards?

No, we can not schedule dynamic dashboards for refresh. It must be done manually.

117.Explain dynamic Dashboard.

Dynamic dashboards in Salesforce displays set of metrics that we want across all levels of your organization.

Dynamic Dashboards in salesforce are Created to provide security settings for the dashboards in salesforce.com. We may have a requirement in an organization to **"view all data"** by every user in an organization according to their access we have to select Run as Logged-in User. There are two setting option in Dashboards. They are

1. **Run as specified User.**
2. **Run as Logged-in User.**

118.Who can access "drag and drop dashboard"?

User who have permissions in managed dashboard can access drag and drop dashboard.

119.Which type of report can be used for dashboard components?

Summary reports and Matrix reports are used for dashboard components.

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

The user must have “View All Data” permission is required to set the running users.

121.What is the use of “floating report header”?

Floating report headers enables us to display the column header visible on each page when we scroll the report page.

122.How to enable “floating report header”?

To enable floating report header in salesforce go to Setup=>Customize=>Reports and Dashboards=>User Interface settings=>Click on enable floating report header.

123.What is Analytical Snapshot in Salesforce.com ?

Analytical Snapshot in Salesforce are used to create reports on historical data.

124.What is Workflow?

Salesforce Workflow is a business logic that evaluates the records as they are created, updated in an object to apply automated process like **Assigning Tasks, Emails, Field Update and outbound message sending**.

125.Different Workflow Components available in salesforce?

In salesforce.com. workflows consists of 5 components they are.

1. Workflow rules.
2. Workflow tasks.
3. Workflow Email alerts.
4. Workflow field updates.
5. Workflow Outbound messages

126.What are the different workflow actions available in Salesforce?

1. Tasks.
2. Email alerts.
3. field updates.

4. Outbound messages

127.What is a Workflow Task?

Workflow tasks in salesforce are used to assigns a task to users. Using tasks we can specify the Subject, Status, Priority, and Due Date of the task. Tasks are workflow & approval actions that are triggered by workflow rules or approval processes.

128.What is a Workflow Alert?

Email alert is one of the action used in workflow and approval. They are used to generate email template by a workflow rule or approval process and sent to destination recipients. We can send workflow email alerts to users, contacts having an valid email address.

129.What is a Workflow Field Update?

Field updates in workflow and approval processes specifies the field that we want updated and inserting the new value for it. Depending on the field type, we can choose the following options. They are apply a specific value, make the value blank, or calculate a value based on a formula you create.

130.What is Time-Dependent Workflow?

Time dependent workflows are not executed independently. Time dependent workflows remain constant in the workflow queue as long as the workflow rule criteria is valid.

131.Time-Dependent Workflow – Considerations?

When defining time dependent workflows in salesforce we have to use standard and custom date and date/time fields defined for the object.

- We have to specify time using days and hours.
- Also add actions to existing time triggers.

132.Limitations of Time-dependent workflow?

When defining time dependent workflows in salesforce we have to use standard and custom date and date/time fields defined for the object.

- We have to specify time using days and hours.
- Also add actions to existing time triggers.

133.In which criteria of a workflow – “time dependent workflow action” cannot be created ?

Created, and every time it’s edited.

134.When you can’t add Time dependent action in Workflow rule?

Time dependent actions in workflow rules can not be added when the following actions takes place.

- When workflow rule is active.
- When workflow rule is deactivated and has pending actions in the queue.
- When the workflow rule criteria of a record is set to: created, and every time it’s edited.
- When the workflow rule is included in a package.

135.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 queue or not?

Even after deactivating the the workflow, its action will not be removed. It’s still active in queue.

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

It is not possible to delete the workflow when the workflow is having any pending time dependent actions.

137.How to clear the Time based workflow action queue?

We can clear time based workflow action queue in two ways they are

1. Make the criteria false.
2. Removing scheduled actions from the queue.

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

While creating workflow on task we can not find “Send Email”action.

139.Suppose if a record meets workflow criteria for time based workflow action, the action goes in queue. Later, before the time based action is triggered, the same record gets modified and the criteria previously met is

changed and now it does not meet the workflow criteria. What happens to the time based action placed in Queue?

Simply the time based workflow action is removed from workflow queue and will not get fired.

140.Difference between Trigger and Workflow?

Workflow

- Workflow is automated process that fired an action based on Evaluation criteria and rule criteria.
- We can access a workflow across the object.
- DML operations are not performed in workflows
- We cannot query from database

Trigger

- Trigger is a piece of code that executes before or after a record is inserted or updated.
- We can access the trigger across the object and related to that objects
- We can use 20 DML operations in one trigger.
- We can use 20 SOQL's from data base in one trigger.

---

1. What is Salesforce?

A: Salesforce is the most popular customer relationship management (CRM) platform available today. It provides cloud-based CRM applications designed for use in sales, service, marketing, and much more. Businesses use Salesforce to manage business relationships and their associated data.

2. What is CRM?

A: CRM is an acronym for Customer Relationship Management, and it describes an application that helps businesses automate and digitize sales and marketing activity to manage (and increase) revenue. Sales and marketing professionals leverage CRM's features to attract and retain customers and clients, thereby increasing sales.

3. What are the duties of a Salesforce Administrator?

A: The primary responsibilities and duties of a Salesforce Administrator include:

- Handle normal administrator functions and routine tasks, including user account maintenance, dashboards and reports, and workflows.
- Perform routine internal system audits and prepare the system for possible upgrades
- Help train new Salesforce users and help the staff increase their Salesforce skills.
- Oversee Salesforce data feeds
- Function as a liaison between users, vendors, and development teams
- Work with the organization’s management teams to establish appropriate processes that benefit all administrative, change management, and development activities

4. Explain cloud computing, including the different forms available.

A: Cloud computing is a scalable, on-demand networked system of remote servers hosted on the internet that enables users to store, retrieve, manage, and process information remotely, replacing on-site infrastructure.

Cloud computing comes in three primary forms:

- Infrastructure as a Service (IaaS)
- Software as a Service (SaaS), which also happens to be what Salesforce is based on
- Platform as a Service (PaaS)

5. Name at least six CRM providers.

A: CRM providers include:

- Microsoft Dynamics CRM
- NetSuite CRM
- Nimble
- Oracle CRM
- Sage CRM

- Salesforce CRM
- SAP CRM
- SugarCRM

6. How many different editions does Salesforce have, and how often do they release updates annually?

A: Salesforce has five different editions. They are:

- Developer, letting developers integrate Salesforce with other applications
- Enterprise, for large businesses
- Essentials, for small businesses that want a quick start in CRM
- Professional, targeted at enterprises that need full-featured CRM functionality
- Unlimited, which includes Enterprise edition functionality, full mobile access, premium support, higher storage limits, unlimited custom apps, and more

Salesforce releases three updates a year (Winter, Spring, Summer).

7. Outline Salesforce's available portals.

A: Salesforce has three available portals:

- Customer portal
- Partner portal
- Self-service portal

8. What is Database.com?

A: Database.com is a "Data as a Service" offering from Salesforce, designed to improve CRM application performance and efficiency.

Now that we have gone through the basic level of salesforce admin interview questions, let us level up and look at the intermediate level questions.

Want to master master the core administration features of Salesforce? Check out the Salesforce Administrator Certification Training Course.

Intermediate Salesforce Admin Interview Questions and Answers

Now, let's ramp up the difficulty somewhat with eight tougher salesforce admin interview questions.

9. What is an object in Salesforce?

A: An object is a database table that lets users store data relevant to the organization in Salesforce. There are two types of objects: Standard and Custom. Salesforce.com provides standard objects, while users create custom objects.

10. What is a profile, and what sorts are there?

A: Profiles control and restrict access to a record according to settings and permissions in Salesforce. There are six types:

- Standard user
- Solution manager
- Marketing user
- Read-only
- System administrator

11. Can you freeze a user on Salesforce? How can you delete them?

A: Admins can freeze or deactivate a user by following these steps:

Setup=>Administer=>Manage users=>Users=>Click on Freeze. As for the second part, it's a trick question; users cannot be deleted

12. What's the difference between a role and a profile?

A: Roles are a means for controlling access to a record, while a profile controls what a user can do within that accessed record (e.g., edit, view).

13. Which of these is true? Users can have multiple profiles; profiles can have multiple users.

A: The latter is true. Admins can assign a profile to any number of users, so for instance, all the members of a team can have access to a specific profile. However, users can only have one profile assigned.

14. Name the different data access levels in Salesforce and what they cover.

A: There are four data access levels available for Administrators to work with:

- Organization-level security. You can maintain a list of authorized users, limit login access to certain locations and times, and set password policies
- Object-level security. This access level is the simplest to control. Admins can set permissions on any object, controlling which users can create, delete, edit, or even view the records of any given object
- Field-level security. Although you can grant any user the access to a specific object, you can restrict which fields they can access
- Record-level security. Admins can let users view a particular object, but restrict the object records they can see.

15. List the methods of data storage (documents, images, files) available in Salesforce.

A: These are the storage methods used:

- Attachments
- Chatter Files
- Documents
- Google Drive
- Libraries

16. What is Salesforce Lightning?

A: Lightning is a component-based framework designed for business users unfamiliar with programming. The framework makes app development processes easier.

After having completed the intermediate level questions, let us next increase our difficulty level and learn these advanced salesforce interview questions.

Advanced Salesforce Admin Interview Questions and Answers

Finally, here are eight tough salesforce admin interview questions for the people who know Salesforce well.

17. Referring to a previous question, how do you manage record-level access?

A: Salesforce Administrators can manage record-level access in the following four ways:

- Manual sharing
- Organization-wide defaults
- Role hierarchies
- Sharing rules

18. List the different relationships types found in Salesforce.

A: These are the different relationships that Salesforce users can establish for objects.

- External lookup
- Hierarchical
- Indirect lookup
- Lookup

- Many-to-many (junction object)
- Master-detail relationship
- Self-relationship

19. What is a workflow in the context of Salesforce?

A: It is the business logic that evaluates records while creating and updating processes, determining any need for automated action. Workflow lets records perform an action, such as updating data or notifying people or external systems.

20. If you have an action scheduled to execute in a time-based workflow, would the scheduled action be removed from the queue if the workflow is deactivated?

A: The action remains active in the queue, even if the workflow is deactivated.

21. In the context of activities, what are WhoID and WhatID?

A: WhoID is used for people, such as leads or contacts. WhatID refers to objects such as campaigns, accounts, custom objects, or cases.

22. What is a Rollup summary, and what are its functions?

A: The Rollup summary field calculates the values from a group of related records. The functions of the summary field include:

- Count. Calculates the total number of related records
- Sum. Totals the values of selected fields
- Min. Displays the lowest value
- Max. Displays the highest value

23. When do you use a data loader?

A: When you want to:

- Load more than 50,000 but less than 5,000,000 records
- Load into an object that is not yet supported by web-based importing
- Save multiple mapping files for later use
- Export data for backup purposes
- Prevent duplicates by uploading records

24. What is an Apex transaction?

A: Apex transactions represent a set of operations executed as a single unit. It is alternately called an execution context.

Q #1) What is Cloud Computing? State some advantages.

Answer: Cloud Computing is all about the delivery of on-demand computing services. These services are divided into three categories – Platform-as-a-service(PaaS), Infrastructure-as-a-service(IaaS) and Software-as-a-service(SaaS).

The hallmark of these services is innovation at a faster rate and flexibility in the available resources. **The advantages of Cloud Computing are:**

- Security
- Less expensive
- Enhance Collaboration
- Offer Flexibility
- Provide Insights
- Automated Software Updates
- 24 x 7 Availability

Security

Cloud Computing helps to store all the enterprise sensitive data in its system and this can be accessible, even if your computer is down. The security is offered by encrypted data – transmitted over the network and stored in a database.

Less Expensive

Since less cost is incurred due to hardware in Cloud Computing, the services offered are bound to save costs for your enterprise. It allows you to pay per your operational requirements, adopting a subscription plan.

Enhance Collaboration

Cloud Computing simplifies the process of collaboration and enables your employees to work as a team. It increases the engagement of your people with collaborative social spaces.

Offer Flexibility

If there is an increasing demand for bandwidth, then Cloud offers almost instant service, without any need to undergo a complex update to your IT infrastructure. The cloud increases the flexibility in the service compared to a local server hosting.

Provide Insights

You can obtain a different perspective of your data with an integrated Cloud Analytics.

Cloud-based services make it simpler to track and generate customized reports -based on enterprise-wide data.

Automated Software Updates

Cloud Computing applications automatically update the software, with no need for your organization to undergo a manual update. This saves money to a considerable extent.

Availability (24 x 7)

The Cloud-based service providers provide a 24 x 7 service. It is possible to access the services, from anywhere and they are highly reliable. It is possible to offer some of the services, offline.

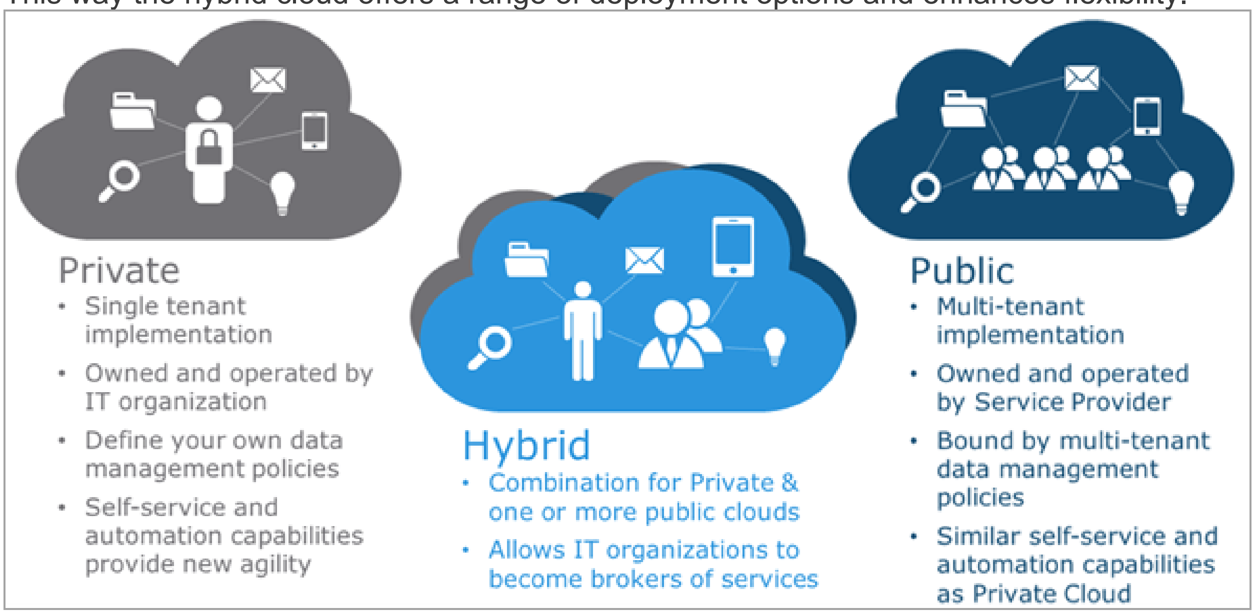
Q #2) What are the differences between Private and Public Cloud?

Answer: Public Cloud is offered across the globe by sharing hardware, storage and network devices with various organizations. These organizations are termed as cloud tenants.

Private cloud is limited for an organization, with infrastructure and services are maintained on the private network for an organization or any business entity. It allows the organization to meet the demands of specific business requirements – with customization of private resources.

Q #3) Can you differentiate between Hybrid Cloud and Public Cloud?

Answer: Hybrid Cloud brings out the best of both the worlds – public and private clouds. This way the hybrid cloud offers a range of deployment options and enhances flexibility.



[image source]

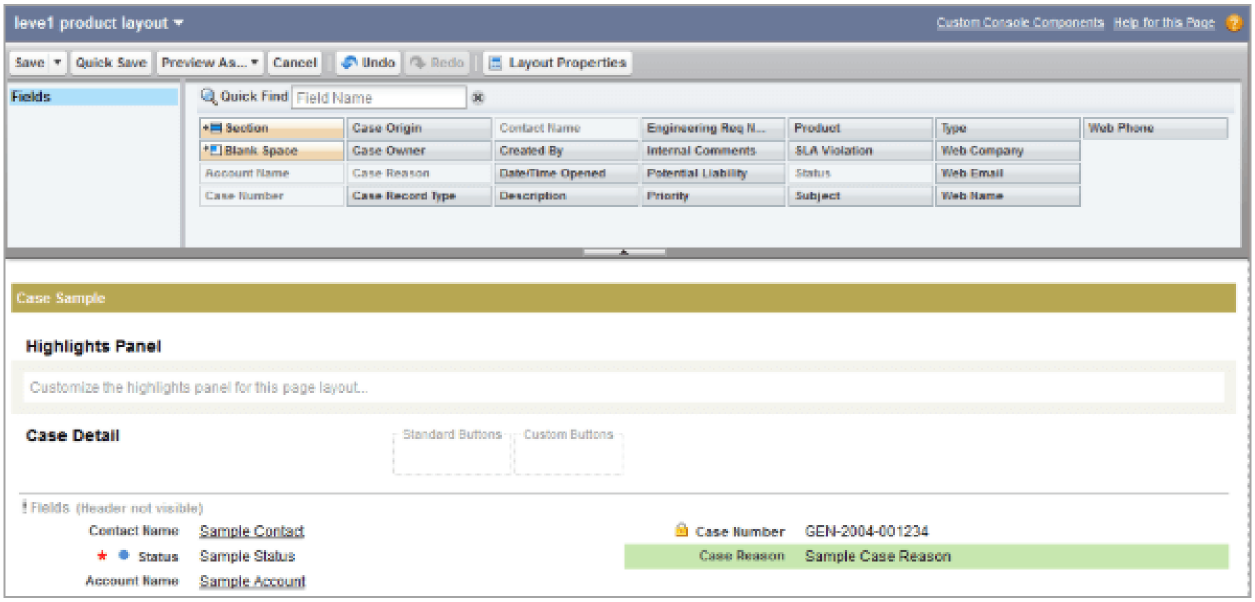
Suggested Read =>> Salesforce Admin Certification – A Complete Study Guide

Cloud bursting is another option when the organization transitions from a private cloud to a public cloud – managing an increase in demand, during seasonal activities such as online shopping.

However, in the case of a public cloud the resources are shared with other organizations too. Here the account is managed and services accessed – using a web browser.

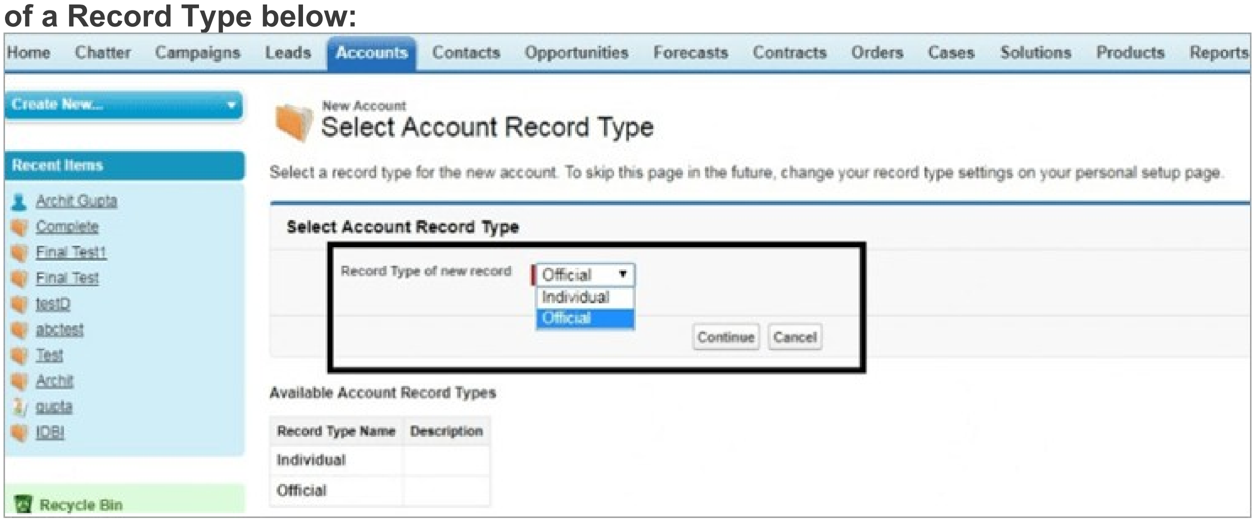
Q #4) What is Page Layout in Salesforce? What are the Record Types?

Answer: Page Layout is about the control of fields, buttons, Visualforce, custom links and s-control on the Salesforce object record pages. This enables the user to customize the record pages.
It helps to determine the nature of fields – read-only, visible or required. Here is the look of the page layout:



[image source]

For example: Create custom fields for an account object say last recharge amount, membership expiry date and membership plan and then create various page layouts with these fields. **To know more please watch the video:**
On the other hand, record types are most convenient to offer different subsets of picklist values or page layouts for the users. These are based on user profiles. They determine which page layout is visible to a user, based on the user profile. **Please see the example of a Record Type below:**



[image source]

For Example, Use Picklist values for segmentation of your business needs with record types. The segmentation is done based on region, product line or division.

Q #5) What are the types of portals in Salesforce?

Answer: There are three types of Salesforce portals and these are:

- Customer
- Partner
- Self-service

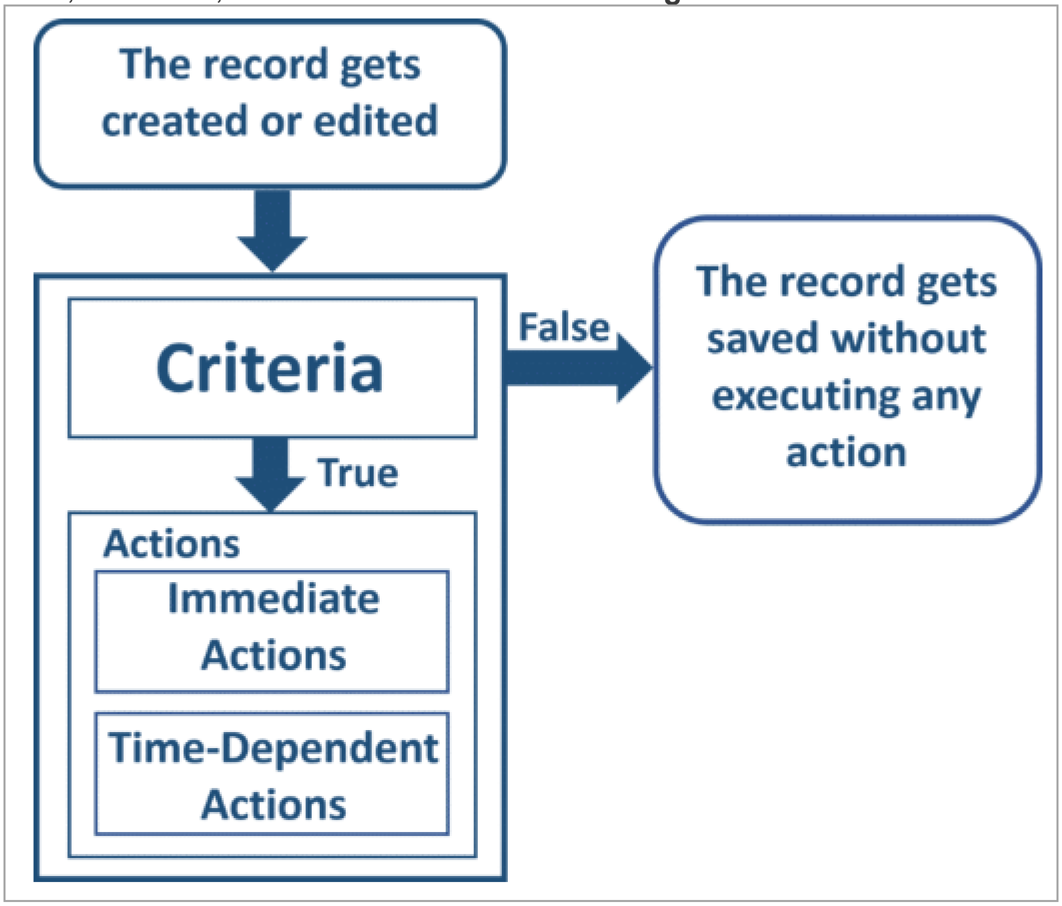
Q #6) What is a Workflow? What all are its components? What is a Workflow Rule?

Answer: Workflow allows you to automate the standard processes and procedures for your organization and saves a considerable amount of your time. The workflow comprises of an if/then statement.

The two major components of the workflow are:

- **Criteria:** This is the "if" part of the statement. You need to set a criterion for a workflow rule. Create a workflow rule for an object and then configure the criteria.
- **Action:** This is the "then" part of the statement. This tells you what to do once the criteria are met and comes after the configuration of a workflow rule. It is possible to add an immediate action or a time-dependent action for a specific workflow rule.

A workflow rule in Salesforce acts as a business logic engine or a container and take some automated actions based on some criteria. It executes the action only when the criteria are True, otherwise, the record is saved. **Here is a figure that shows a workflow rule.**



[image source]

Q #7) What is the Time-Dependent Workflow?

Answer: Time-dependent actions are performed at specific times before the record is closed. The record is re-evaluated by the workflow rule after the time elapses. It checks as to whether the workflow rule criteria are met and only then actions are executed by the workflow rule.

Q #8) How to clear the Time-Based Workflow Action Queue?
Answer: There are two ways to clear the time-based workflow action queue and these are:

- Remove the scheduled actions of the queue.
- The criteria are turned false.

Q #9) If an Action is scheduled to be executed for a Time-Based Workflow, is it possible to delete the Workflow?
Answer: No, it is not possible to delete the workflow in such a scenario, when there is some existing time-based action to be completed**.**
Q #10) In how many ways can you call Apex Classes?
Answer: The many ways to call Apex classes are:

- From Visualforce Page
- Within another Class
- Invoke from a Trigger
- Use a Developer Button
- Use JavaScript buttons and Links
- From Components in a Home Page

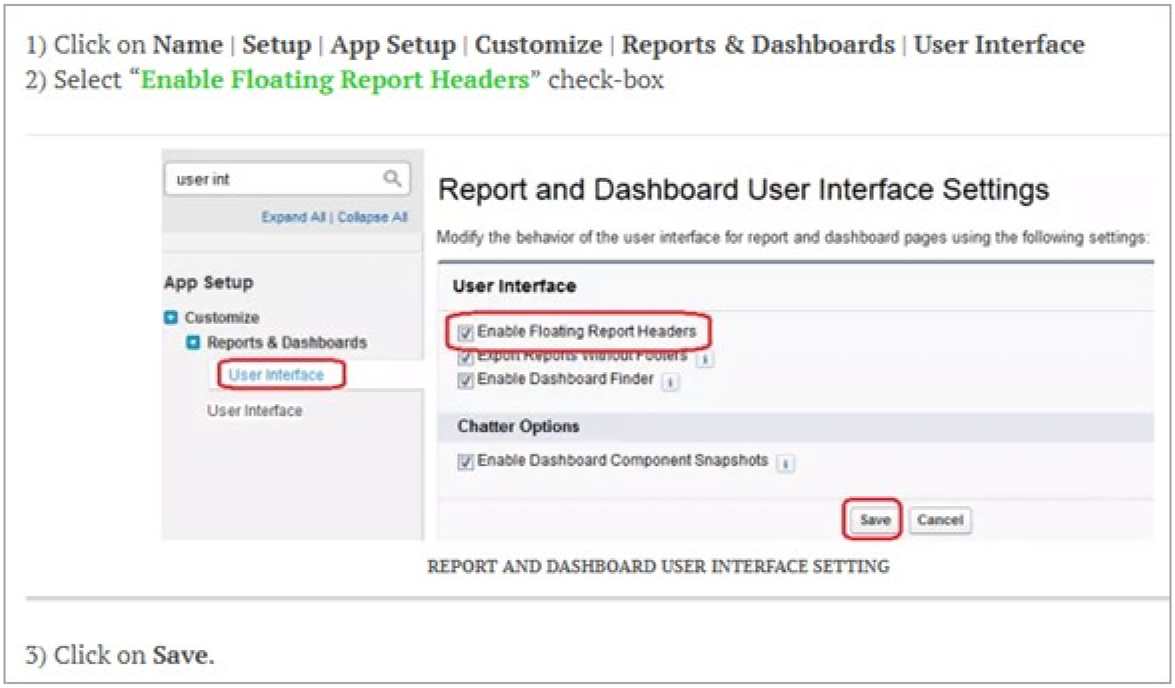
Q #11) What are the different Workflow Actions?
Answer: The various Workflow Actions are:

- Email alerts
- Outbound messages
- Field Update

Q #12) What is a Workflow Task? State the various Workflow Tasks in Salesforce.
Answer: When you need to assign tasks to a Salesforce user you resort to a Workflow Task. It assigns a new task to a user, record owner or a role. It helps to specify various parameters of the task such as subject, priority, status and due date.
For Example, Assign follow-up tasks to a support person, after some time elapses for an updated case.
Q #13) What is a Workflow Alert?
Answer: This is an email created by a workflow rule or an approval process in Salesforce and sent across to various recipients.
Q #14) If you want to set the Running User other than yourself in the dashboard then what is the permission required?
Answer: Here the permission required is "View All Data" to set another running user in the dashboard.
Q #15) How do users see Report Headers while scrolling? What to do to enable this Floating Report Header?
Answer: The parameter "Floating Report Header" is enabled to freeze the report header, so that it appears always on the top of a page, despite scrolling of records**.**
When you want to enable a floating report header, you need to follow the path as stated below:

- ***From Setup-> Enter Reports in Quick Find box***
- ***Select Reports and Dashboards Settings.***
- ***Select Enable Floating Report Headers.***
- ***Click Save.***

For details please visit- [Salesforce]



[image source]

Q #16) Is it possible to schedule a Dynamic Dashboard?

Answer: No, it is not possible to schedule a dynamic dashboard for a refresh. This is only possible when done manually.

Q #17) Who are the people who can access a "drag and drop dashboard"?

Answer: It is possible to access the drag and drop dashboard with users who have the "manage dashboard" permissions.

Q #18) How to run a Salesforce Report?

Answer: All that needs to be done is to click on 'Run Report" and thus run a report automatically in Salesforce.

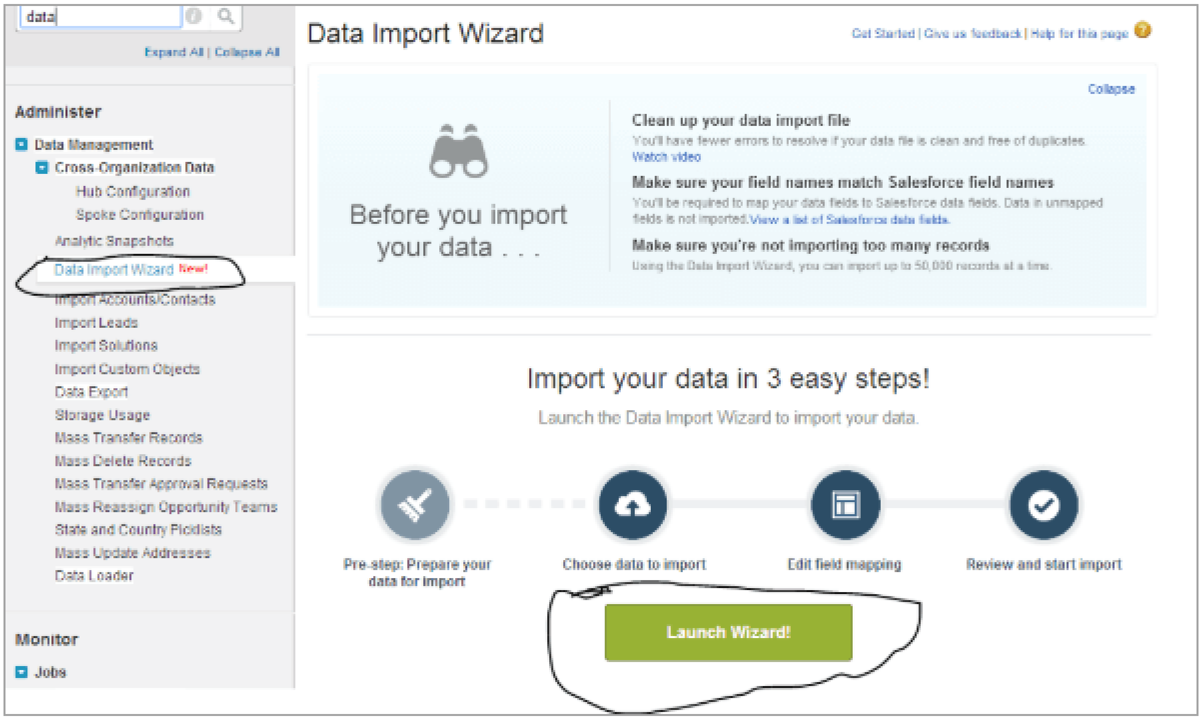
Q #19) Can you name the Data Management Tools in Salesforce?

Answer: The data management tools used in Salesforce are:

- Data Loader
- Data Import Wizard

Q #20) Can you tell me about Data Import Wizard?

Answer: Data Import Wizard in Salesforce makes it easier to import standard objects like accounts, leads, contacts, person accounts, and others. It enables us to import custom objects too. The number of records allowed to be imported is 50,000. Here is an image depicting Data Import Wizard:



Q #21) Can you tell me about Export and Export All with reference to Data Loader?

Answer: Export and Export All are the two buttons present in the Salesforce Data Loader. When the export button is used with any Salesforce object, then all the records belonging to that particular object (except the ones present in the recycle bin) are exported to a .csv file. In the case of Export All option, all records for that object including the ones from the recycle bin are exported to a .csv file.

Q #22) Can the Data Loader delete the reports?

Answer: The Data Loader cannot delete reports in Salesforce.

Q #23) State what are Custom Reports in Salesforce? What are Custom Report Types?

Answer: Custom Reports in Salesforce are built as per the requirements of your organization. These reports can be built on standard and custom objects.
When the user is keen to create a complex, dynamic report quickly then he/she uses a template or framework to specify the object/relationship or the fields that make the report.

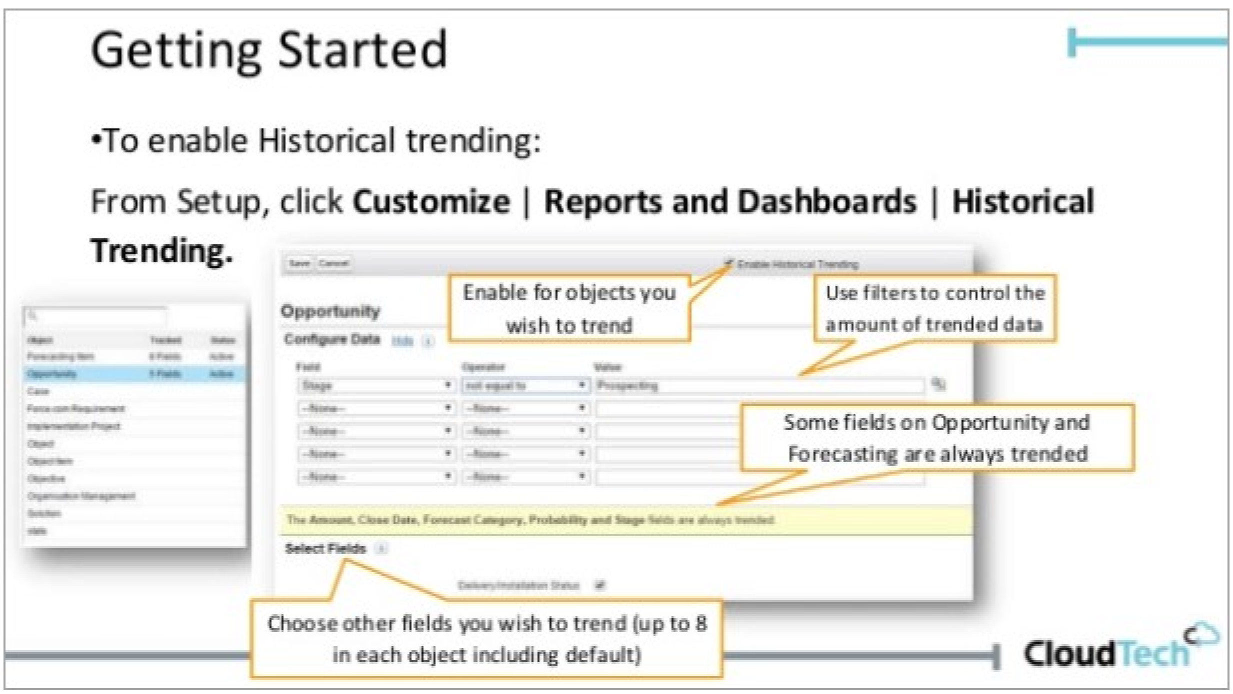
Q #24) What are the Matrix and Trend Report?

Answer: Matrix Reports are similar to a summary report but both rows and columns are grouped in it. Here data appears as in Excel sheets – both vertical and horizontal. **Here is a diagram for a matrix report:**

	Start Date			
	Q1 FY2012	Q2 FY2012	Q3 FY2012	Q4 FY2012
Sum of Quota (Rev) Sum of Closed (Rev)	USD 0.00 USD 0.00	USD 0.00 USD 0.00	USD 0.00 USD 0.00	USD 0.00 USD 0.00
Sum of Quota (Rev) Sum of Closed (Rev)	USD 0.00 USD 0.00	USD 0.00 USD 0.00	USD 0.00 USD 0.00	USD 0.00 USD 0.00
Sum of Quota (Rev) Sum of Closed (Rev)	USD 0.00 USD 15,099.24	USD 0.00 USD 106,221.58	USD 0.00 USD 106,519.43	USD 0.00 USD 58,702.20
Sum of Quota (Rev) Sum of Closed (Rev)	USD 0.00 USD 26,435.61	USD 0.00 USD 85,929.96	USD 0.00 USD 85,229.84	USD 0.00 USD 89,574.38
Sum of Quota (Rev) Sum of Closed (Rev)	USD 0.00 USD 87,600.10	USD 0.00 USD 268,035.74	USD 0.00 USD 241,578.33	USD 0.00 USD 242,698.93
Sum of Quota (Rev) Sum of Closed (Rev)	USD 3,000.00 USD 46,065.24	USD 3,000.00 USD 25,752.95	USD 0.00 USD 49,829.06	USD 0.00 USD 94,422.35
Sum of Quota (Rev) Sum of Closed (Rev)	USD 0.00 USD 0.00	USD 0.00 USD 0.00	USD 0.00 USD 0.00	USD 0.00 USD 0.00
Sum of Quota (Rev) Sum of Closed (Rev)	USD 3,000.00 USD 175,200.20	USD 3,000.00 USD 485,940.23	USD 0.00 USD 483,156.65	USD 0.00 USD 485,397.86

[image source]

On the other hand, trend reports are based on historical data. Here you can consider the fields that contain historical data and which can be left out. Here are some details on a Trend Report.



[image source]

Q #25) State what is Roll-up Summary Field?

Answer: Roll-up summary field is used for calculating values for related records say, a related list. It can be used to create value for a master record – based on the value in those

of the detail records**.** However, the detail and the master must be connected with a master-detail relation.
For example: If there is a custom account field called Total Invoice Amount then this can be used to display the total of all related custom invoice records for the Invoice related list of the account.

Q #26) Is it possible to change/modify the Child Record Settings of a Master-Detail Relationship, for setting Owd (Organization-Wide Settings)?

Answer: No, the child record settings cannot be changed for a master-detail relationship, applicable for an Owd.

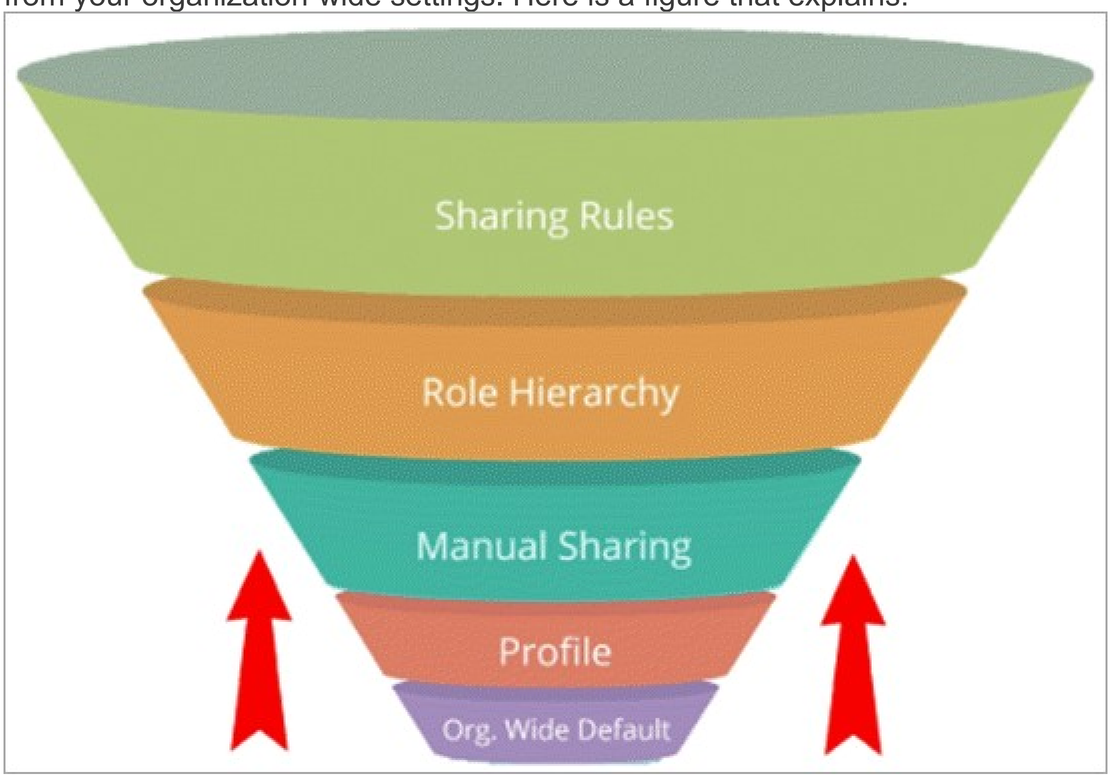
Q #27) State the cause of error for insufficient privilege access in a Partner Community with External Users. The User has proper Owd and Profile Settings for any object.

Answer: We need to check the following to determine this error so that the external user must have access to all the data for the internal user.

- Check field-level security for all fields for the external users – used in the reports.
- Check as to whether the Standard Visibility Record Settings are enabled. If enabled then only the user can view all the standard report types.

Q #28) What are Sharing Rules? Name what are the types of sharing Rules?

Answer: The sharing rule provides sharing access to users belonging to roles, public groups or territories. It provides a greater level of access with automatic exceptions, away from your organization-wide settings. Here is a figure that explains:



[image source]

The two types of sharing rules are:

- Owner-based sharing rules
- Criteria-based sharing rules

Owner-based Sharing Rules: Access is given for records owned by other users.

For Example, The Sales Head of a US company giving access to the Sales Manager in the European region to opportunities owned by the US team.

Criteria-based Sharing Rules: Access is given based on record values and not based on record owners. It states who do you share records based on the field value.

For Example,There is a custom picklist value called the department for a custom object in your organization named job application. A criteria-based sharing rule allows the IT manager to see all job applications for the department field set as “IT”.

Q #29) What do you think are the best practices of creating Contact Sharing Rules?

Answer: The permissions for the read, read/write, write are used by using the default settings across the entire organization.

Q #30) What do you mean by Login Hours and Login IP Ranges?

Answer: The first parameter sets the hours when the user of a specific profile can use the system. This can be set by the following path:

Setup | Administration | Manage users | Profiles.

The second parameter sets the IP addresses for the users of a particular profile login into Salesforce otherwise they are denied access. This is set by the following path:

Setup | Administration setup | Manage users | Profiles.

Q #31) What is Field-Level Security? How do you set Field-Level Security on a single field for all profiles?

Answer: This is a setting that comes in handy for restricting the view and edit of certain fields by the Salesforce users. For setting field-level security for a specific field but all profiles, **navigate to the following path:**

Management Settings of a field object> Select the field in the field area-> View Field Accessibility->Specify the access level of the field.

For details please visit- Salesforce

Q #32) What is a Standard Profile?

Answer: Standard profiles are used in every Salesforce org and enable editing of settings. However, in some organizations where it is not possible to create a custom profile, as in Contact Manager and Groups Editions, the users can be assigned with standard profiles but unable to view or edit them.

Q #33) State what are User Permissions in Salesforce?

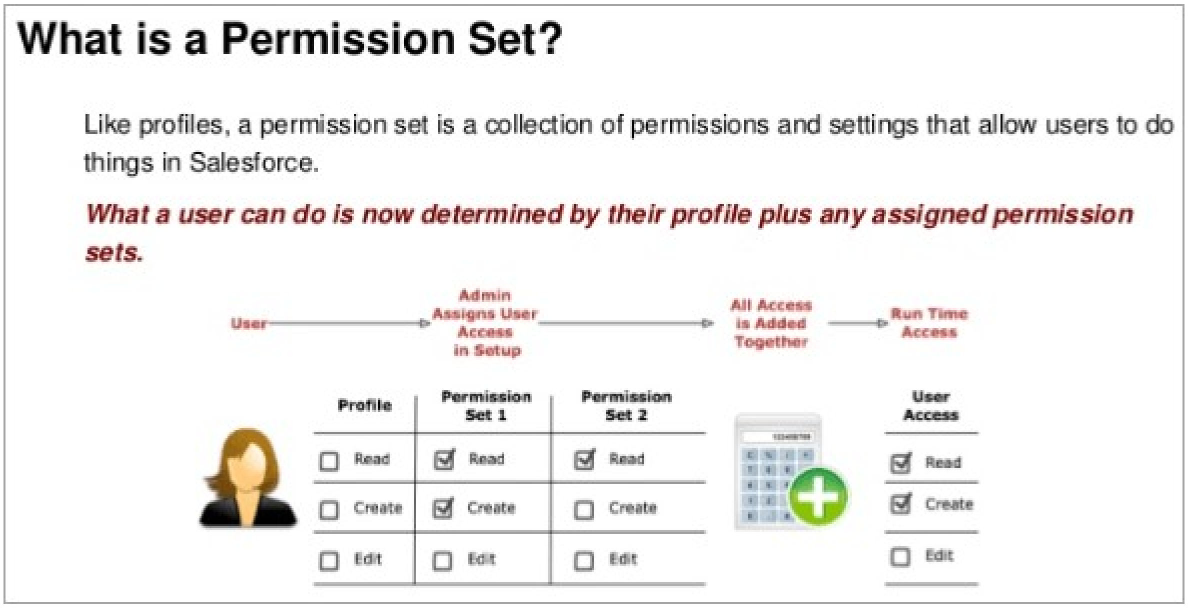
Answer: The tasks performed by the Salesforce users as well as the accessible features are the functions of the user permissions. These user permissions are enabled by custom profiles and permission sets.

For Example, There is user permission “View Setup and Configuration” and the user can access the Setup pages in Salesforce with this.

Q #34) What are the Permission Sets in Salesforce?

Answer: The Salesforce users can access various functions and tools with a collection of settings as well as permissions. Although the permission sets are also available in the user profiles when there is a need to access functional aspects then the permission sets are used, with no need to change the profile, whatsoever.

Here is a figure that explains Permission Sets:



Q #35) Which fields are indexed by default in Salesforce?

Answer: The default indexed fields in Salesforce are:

- Primary Keys (ID, owner and name fields)
- Foreign Keys (lookup and master-detail relationship)
- Audit Dates
- Custom Fields (only marked as External ID or unique)

Q #36) When to use indexed fields in Salesforce?

Answer: Indexed fields can be used in query filters and this serves the purpose of optimization of query retrieval time and thus quickly fetches the records.

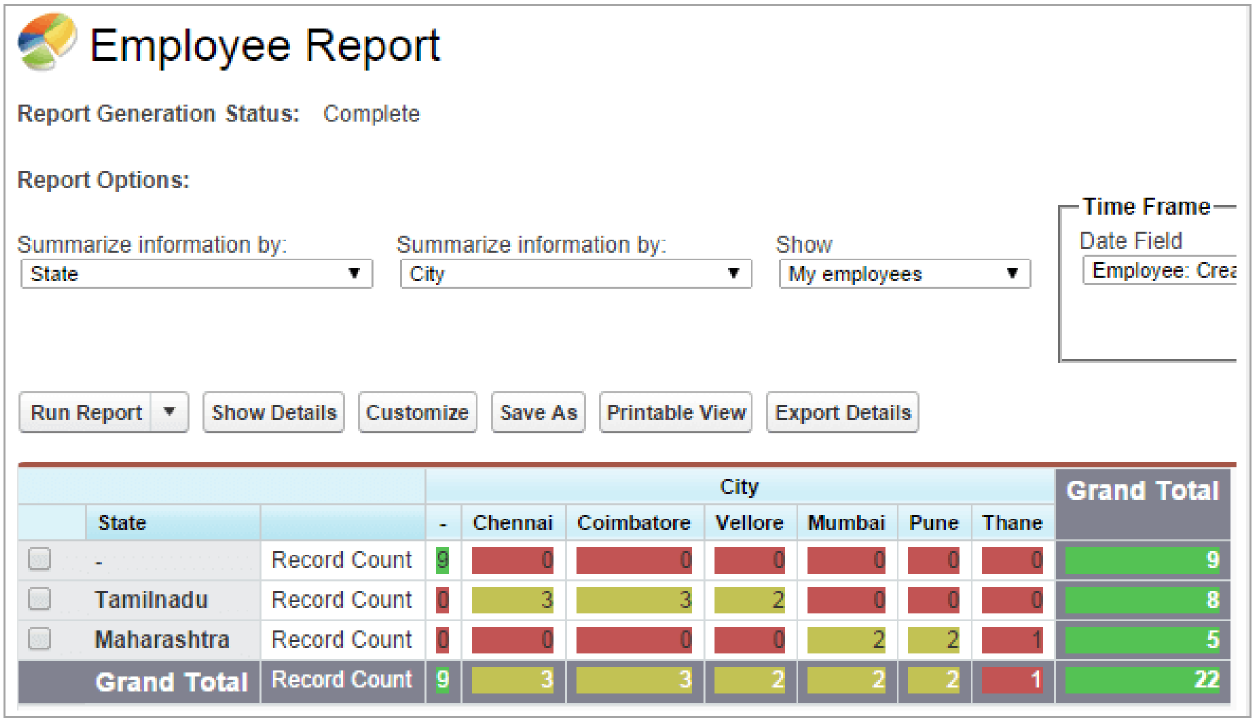
Q #37) What is “transfer record” in Profile?

Answer: Transfer record permission when given to a user allows the user to transfer all records with the read access.

Q #38) What is conditional highlighting in Salesforce Reports? State some limitations.

Answer: When you need to highlight field values in matrix or summary reports with the use of ranges or colours then conditional highlighting is used. But, one thing is important for you to remember that the report must have at least one summary field or custom summary formula. This is shown in the below figure:

For example:



[image source]

The limitations of conditional highlighting are:

- Only applied to summary rows.
- Only for summary and matrix reports.
- Use a maximum of up to three conditions in a report.
- Use only for summary rows.

Q #39) How to automate business processes?

Answer: Salesforce used various tools such as approvals, workflow, process builder and flow builder to automate business processes.

Q #40) What is Approval Process? Are automated actions supported by Approval Processes? How many?

Answer: Approvals comprise of a sequence of steps for approval of records in Salesforce. The approval process specifies how records are approved in Salesforce. It elaborates on details such as the person from whom the approval request arises and what all is done at every step.

Yes, four types of automated actions are supported by the approval process.

Q #41) What are Queues in Salesforce?

Answer: Queues in Salesforce help to prioritize, distribute as well as assign records to teams sharing workloads. They apply to cases, service contracts, leads, orders, custom objects and many such more.

It becomes possible for the queue members to jump and take ownership of any record that is in the queue. **To know more, watch this video on Salesforce Queues**:

For example: Create a queue on a case for support agents assigned to various service levels**.**

Q #42) Can you throw some light on Assignment Rules? How do you Set up an Assignment rule?

Answer: Assignment rules impose conditions on the processing of cases or leads. You can set up and assignment rule by following the path:
Go to Setup->Search for Assignment Rules in Quick Find Box-> Choose Lead/Case Assignment Rule->Click New-> Save after a name->Create Rule entries.
For details please visit- Salesforce

Q #43) What are Custom Labels in Salesforce? How to access custom labels? What is the character limit for Custom Labels?

Answer: Custom Labels help to create a multilingual application in Salesforce. They provide information automatically to the users in the form of error messages and help texts – by using their native language.
Custom Labels are defined as custom text values to be accessed from a Visualforce page or an Apex class or even Lightning components. These values then are translated into any language that is supported by Salesforce. You can access the custom labels with the below path:

Setup->Search Custom Labels in Quick Find Box->Custom Labels

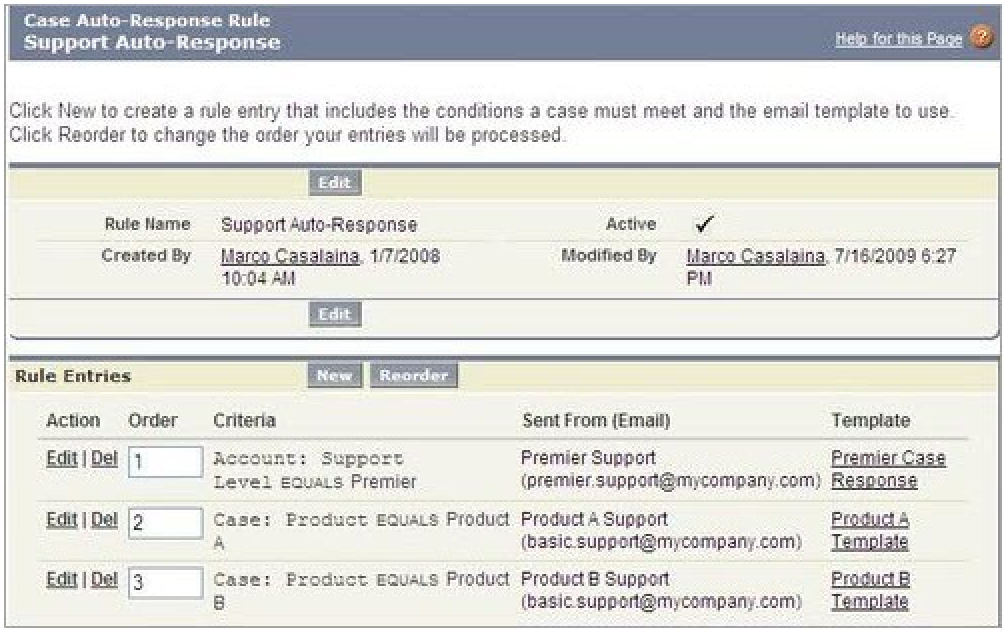
> To access custom labels, from Setup, enter `Custom Labels` in the `Quick Find` box, then select **Custom Labels**.

For details please visit- Salesforce
It is possible to create 5000 custom labels for your organization and the character limit is 1000.

Q #44) What is Auto-Response?

Answer: This is about sending automatic emails to cases or leads for specified record attributes. Quickly reply to customer issues or inquiries by setting up an auto-response rule. At a time, it is possible to set one rule for a case and one for a lead.
Here is how an auto-response rule looks like for two levels of support in an organization (Basic and Premier) and two products (A and B). For a premier support customer, with a case, the premier template is sent from the corresponding Premier Support email address.

On the other hand, the basic support customer will receive a different template.



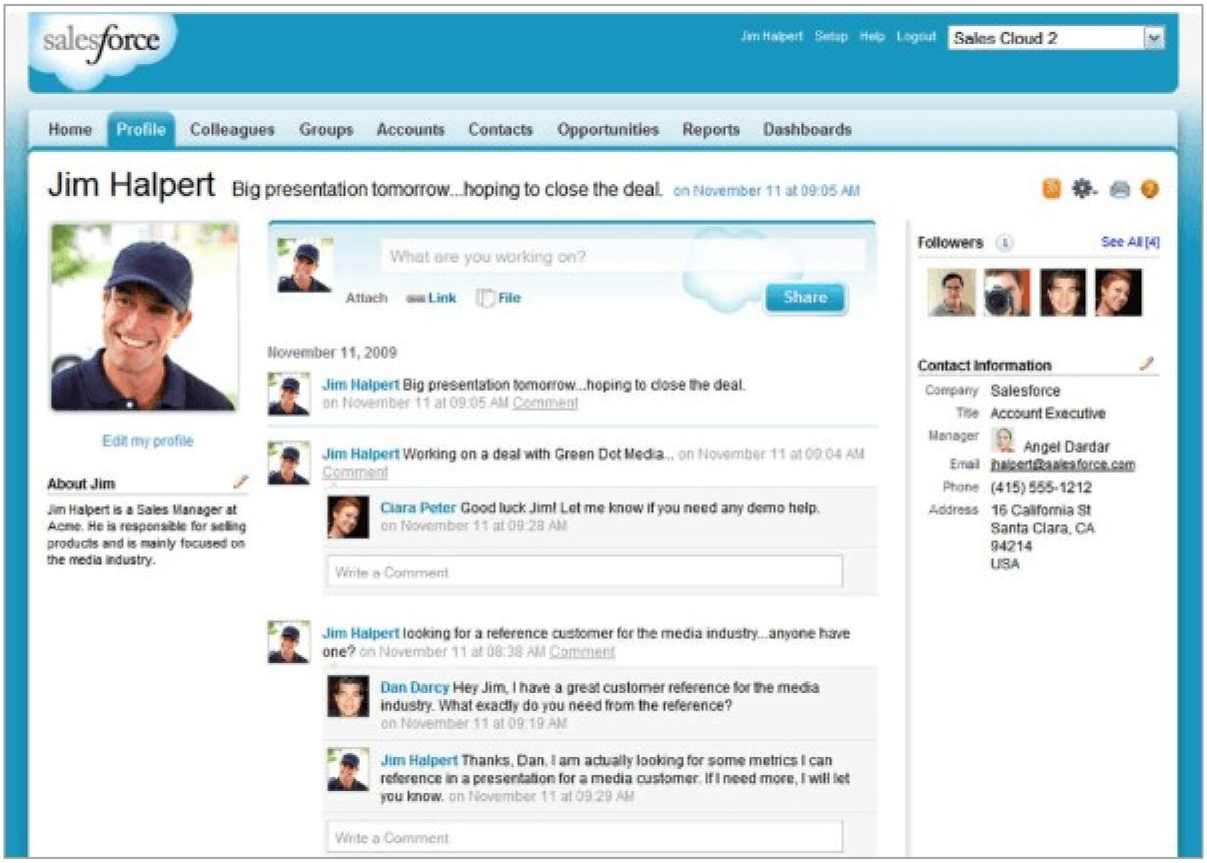
Q #45) What are Escalation Rules?

Answer: These rules apply to the escalation of cases as per the criteria defined in the escalation rule entry. Along with the rule entries, it is possible to create escalation actions to specify what happens when a case escalates. An escalation rule can reassign the case to another support agent or even a support queue.

Q #46) What are the uses of Salesforce Chatter?

Answer: Chatter is the Salesforce's enterprise social networking application that allows users to share information, working collaboratively and conversing with each other. It helps to build higher employee engagement by motivation.

It also provides a forum across the enterprise to share insights or novel ideas. You can use the mobile feed to track your team for a critical project for a mobile-first experience. **Here a figure on how it looks like:**



[image source]

Q #47) How to identify a class as a Test Class in Salesforce? What are the best practices to write a Test Class?

Answer: Test classes enable efficient debugging. The Test Classes can create error-free code in Apex. Test Classes are used in Apex for unit testing. Test Classes detect bugs in your code and improve your code.

Moreover, it also does Code Coverage. Code Coverage is the percentage of code that works and the minimum is 75 % as you navigate your code from Sandbox to Production org.

Some of the best practices for test classes are:

- Test Class is annotated with **@isTest** keyword.
- Any method used inside a test class must have the keyword **testMethod** and can be termed as a test method.
- The system.assertEquals enables you to know what is being tested and the expected output.
- The annotation isTest(SeeAllData=true) if for opening data access at the class or method level.
- The annotation@ Test.runAs.is used for a particular user.
- You must avoid creating Multiple test methods for testing the same production code method.

Q #48) How to expose an Apex Class as a REST Webservice in Salesforce?

Answer: REST architecture is needed to expose your Apex classes and methods. This is to ensure that external applications can access the code through REST architecture.

The annotation **@RestResource** in the Apex class is used to expose as a REST Resource. Next, use the **WebServicecallback method** and the global classes.
When using a custom REST Web service method you must not use the credentials of the current users. But users who are accessible to these methods can use them, irrespective of their sharing rules, permissions, and field-level security.

However, when using the REST Apex annotations, you must bear it in mind that no sensitive data is exposed.

Here is the code snippet:

```
global class AccountPlan {
webservice String area;
webservice String region;
//Define an object in apex that is exposed in apex web service
global class Plan {
webservice String name;
webservice Integer planNumber;
webservice Date planningPeriod;
webservice Id planId;
}
webservice static Plan createAccountPlan(Plan vPlan) {
//A plan maps to the Account object in salesforce.com.
//So need to map the Plan class object to Account standard object
Account acct = new Account();
acct.Name = vPlan.name;
acct.AccountNumber = String.valueOf(vPlan.planNumber);
insert acct;
vPlan.planId=acct.Id;
return vPlan;
} }
```

Q #49) What is an Attribute Tag?

Answer: Attribute Tag is the definition part of the attribute for a custom component and can only be used as a child for a component tag. Salesforce automatically creates an attribute for all custom component definitions such as id and this cannot be used to define attributes.
Here is a code snippet:

```
<!-- Page: -->

<apex:page>
    <c:myComponent myValue="My component's value" borderColor="red" />
</apex:page>

<!-- Component:myComponent -->

<apex:component>
    <apex:attribute name="myValue" description="This is the value for the component." type="Str
    <apex:attribute name="borderColor" description="This is color for the border." type="String

    <h1 style="border:{!borderColor}">
        <apex:outputText value="{!myValue}"/>
    </h1>
</apex:component>
```

Refer to the above code with example.

Basic Interview Questions

1. Explain Salesforce Admin characteristics.

Characteristics	Salesforce Admin 201
What do we learn?	Workflow, field creation, and management
Who can learn?	System Admin, Architect, and Security Analyst
What is the average annual salary?	US$82,000

2. Expand CRM and explain.

The expansion of CRM is '**Customer Relationship Management**.'

CRM is an application that helps automate or digitize marketing functions. With this software, companies can plan to increase their profits and revenues. This strategy of incrementing revenue and profit is made by attracting customers, clients, and sales. The important concept of CRM is customer value.

There are four CRM initiatives as below:

- Customer acquisition
- Customer retention
- Customer churn
- Customer win-back

3. Distinguish between Salesforce.com and Force.com.

Both are relatively the same but different in their functionality.

- **Salesforce.com** helps build CRM-functionality-based applications, e.g., an iPhone 'app' that stores contact details, makes phone calls, and has all the other standard functions of a phone.
- **Force.com** is used to customize a data model and a user interface, e.g., an iPhone OS environment that can build and run apps.

Check out this insightful [Salesforce Tutorial] to learn more about Salesforce!

4. What are the available portals in Salesforce?

Three types of portals are available in Salesforce.com:

- **Customer portal**: It enables us to utilize the capabilities of the web as the ideal channel to deliver superior self-service.
- **Partner portal**: It allows partner users to log in to Salesforce via a separate website than that is used for our non-partner users.
- **Self-service portal**: Customers will be able to search for details about the organization using this portal.

From Intellipaat's Salesforce Course in London, get a clear understanding of Salesforce!

5. Why do we use Tabs in Salesforce? Mention the types of Tabs.

In Salesforce.com, a list of tabs is placed in the Tab menu. Tabs are used to access an object's data.

There are three types of tabs:

- Custom tab
- Visualforce tab
- Web tab

Intermediate Interview Questions

6. What is Profile? Mention the types of Profiles available in Salesforce.

A profile is similar to settings and permissions in Salesforce. It is used to perform different functions that are defined by users. It is another way to manage particular records.

There are two types of profiles:

- **Standard profiles:** Profiles created by Force.com
- **Custom profiles:** Profiles created by users

Salesforce standard profiles are:

- Standard User
- Solution Manager
- Marketing User
- Read-only
- System Administrator

Know more about [Why you should go for the Salesforce Certification Training?]()

7. How to delete or freeze users in Salesforce.com?

Deleting a user is not possible in Salesforce.com, but we can deactivate the user by using the **Freeze** option.

To freeze a user, go to:

```
Setup > Manage Users > Users
```

Find and click on the user and then click on **Freeze**

Watch the below Salesforce Admin tutorial to learn more:

8. Mention the ways to store files, documents, and images in Salesforce.com.

We can store files, documents, and images in Salesforce.com as below:

- Attachments
- Documents
- Google Drive
- Libraries
- Chatter Files

Do you know why Salesforce is the most sought-after CRM tool? Find out in this blog!

9. Give one-word answers to the following questions:

a. In the Visualforce page, how many field dependencies are used?
b. Can two users have the same profile in Salesforce?
c. Which field cannot be added as a custom index?
d. Can we edit a formula field value in a record?
e. Can we use sharing rules to restrict data access?

a.10 field dependencies
b. Yes
c. Formula field
d. No
e. No

Now, you are aware of the benefits of Salesforce. For more, enroll in the Salesforce Course now!

10. How to set the Login Hours and Login IP ranges for the users in Salesforce?

Login Hours: If Login Hours is set in an organization, then it restricts the login before or after login hours.

```
Setup | Administration | Manage users | Profiles
```

Login IP: It helps restrict the login attempt from unauthorized IP addresses.

```
Setup | Administration setup | Manage users | Profiles
```

11. List the characteristics and functions of a Roll-up Summary field.

Characteristics of a roll-up summary field:

- It can be created for a Master–Detail relationship but not for a Lookup relationship.
- Auto numbers are not available here.
- We cannot change the field type in a roll-up summary field.
- It derives data from the Child object.

Functions of the roll-up summary field:

- Count
- Sum
- Min
- Max

12. What are the different kinds of Reports in Salesforce?

Different kinds of reports in Salesforce are:

- **Tabular Report:** It is similar to a spreadsheet and is the simplest and fastest way to see data. Tabular reports are the best to create lists of records.
- **Summary Report:** It is similar to a tabular report but allows users to group rows of data, view subtotals, and create charts.
- **Matrix Report:** It is similar to a summary report, but it allows users to group and summarize data by both rows and columns.

- **Joined Report:** Joined reports let us create multiple report blocks that provide different views of our data and each block acts as a subreport.

13. Define Dynamic Dashboards. Can we schedule Dynamic Dashboards?

Dynamic dashboards help us display the set of metrics in an organization. They are created to provide security settings for dashboards at Salesforce.com.

Two setting options are there in dynamic dashboards:

- Run as a specified user
- Run as the logged-in user

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14. Name the different Workflow components in Salesforce.com.

There are five workflow components in Salesforce.com:

- Workflow Rules
- Workflow Tasks
- Workflow Email Alerts
- Workflow Field Updates
- Workflow Outbound Messages

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15. What are the limitations of a Time-dependent Workflow?

Limitations of a time-dependent workflow are as follows:

- Time triggers do not support minutes or seconds.
- Time triggers cannot reference when formula fields that include related-object merge fields.

- We cannot add or remove a time trigger if:
    - The workflow rule is active
    - The workflow rule is included in the package

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16. How many ways are there to call an Apex class?

There are four ways to call an Apex class:

- Visual page
- Web service
- Triggers
- Email services

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Advanced Interview Questions

17. How to insert multiple records at a time?

```
public class insert50
{
public void p1()
{
List lstExample = new List();
Example_c objTest;
objTest = new Example_c(name='Example1',city_c='City1');
lstTesting.add(objTest);
objTest = new Example_c(name='Example2',city_c='City2');
lstTesting.add(objTest);
objTest = new Example_c(name='Example3',city_c='City3');
lstTesting.add(objTest);
insert lstTesting
}
}
```

18. When do we use Data Loader?

We use Data Loader when:

- We need to load more than 50,000 to less than 5,000,000 records
- We need to load into an object that is not yet supported by web-based importing
- We want to be able to save multiple mapping files for future use
- We want to export our data for backup purposes
- We want to prevent duplicates by uploading the records

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19. Define SaaS.

In **Software as a Service (SaaS)**, the cloud service provides software that we need to develop an application, saving us from purchasing it. SaaS supports web services and service-oriented architecture.

Top SaaS providers are:

- Abiquo
- Accelops
- Akamai
- AppDynamics
- Apprenda

Learn complete concepts of Salesforce from this Salesforce Training at Hyderabad in just 24 hours!

20. Define PaaS.

In **Platform as a Service (PaaS)**, the cloud service provides an operating system (OS), hardware, storage, and network services through the cloud, but we have to pay to the service providers based on our subscription, like the rental services.

Top PaaS providers are:

- AWS Elastic Beanstalk

- AppScale
- Appistry (Cloud)
- CA Technologies
- Engine Yard

21. Define IaaS.

In **Infrastructure as a Service (IaaS)**, the cloud service provides the infrastructure, such as servers, hosting service, and storage.

Top IaaS providers are:

- AWS
- AT&T
- CA Technologies
- Cloudscaling
- Bluelock
- Eucalyptus

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22. What are the different Salesforce editions?

- **Essentials**: The Salesforce Essentials edition is specially designed for small-scale businesses. It consists of an easy-to-use UI. There are various tools in the edition that help customize it according to business needs.
- **Professional**: This edition is built for businesses that require most of the CRM functionality. It has features such as easy customization and integration with other technologies. Also, it consists of administration tools that help in the deployment of a small-scale application.
- **Enterprise**: The Enterprise edition is built for large-scale businesses. It provides advanced customization tools. The administration tools of the Enterprise edition help large-scale deployment. The edition allows access to the features of the Salesforce API.

- **Unlimited**: This edition consists of extremely advanced features that help maximize usage. The Unlimited edition of Salesforce allows for the efficient management of business resources that can be provided instantly on-demand. Also, it provides premier support, high storage limit, an increased number of custom apps, and many more features.
- **Developer**: The Developer edition gives access to APIs and the Lightning Platform. It provides tools that allow developers to customize the Salesforce platform and integrate with other technologies and applications. Also, the edition consists of those features that are present in the Enterprise edition.

23. What are login hours and login IP ranges in Salesforce?

Salesforce applications provide features such as **login hours** and **login IP ranges**.

Login hours : In an organization, the schedule for login and logout is set to define the time limit and working hours. It flags the user who does not follow the schedule. To set the login hours for an organization in a Salesforce platform, go to:

```
Setup > Administration > Manage Users > Profiles
```

Login IP ranges: If a user tries to login via an unknown IP, then the organization is alerted, and it can restrict the user to do so. Organizations use IP ranges to maintain secure access so that they can prevent any kind of loss. For setting up the login IP ranges, go to:

```
Setup > Administration Setup > Manage Users > Profiles
```


24. What is field-level security and how can it be controlled?

Field-level security helps control the accessibility of a user to a particular data field. Suppose, if an organization is providing a user with the access to see, edit, manipulate, or delete a data object specific to the user’s field of work, it can hide other data objects from the user.

To control the field-level security, we use **profile** and **permission** sets. The attributes of profile and permission sets are mentioned below:

- **Profiles**
  - Page layouts
  - IP ranges
  - Login hours
  - Desktop
  - Client access

- **Permission**
  - App permissions
  - Record types
  - Tab settings
  - Assigned apps
  - Object permissions
  - Field-level security
  - Apex classes
  - Visualforce pages

25. What is a custom metadata type?

The custom metadata type stores information about an organization. It is a type of custom object that can be customized, deployed, packaged, and upgraded. It helps use data for configuring the application without fretting about data migration. Rather than transferring the custom metadata type manually, it can be deployed using a Sandbox.

26. What is the difference between managed and unmanaged packages?

Attribute	Managed Packages	Unmanaged Packages
Customization	The code or metadata cannot be changed	If required, the code and metadata can be customized
Upgrades	The solution is upgraded by	For upgrading, we should replace the

	the provider	previous version with the new version
Org Limits	There is no limit for the usage of app, tabs, and objects	The packages set limits for the usage of apps, tabs, and objects

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