My current project is schumachor group its health care domain and force.com application.

In this project initially RAM (regional area managers) are there they are going to hospitals and collecting the patient information and create record in **patient case** custom object. When they are creating record in patient case object there is on status pick list field and they put it is as Enquiry and again they are going collect patient personal address information and create one record **Address** custom object . In this project we use standard objects like **account** for storing hospital information and **contacts** for storing doctor’s information. And in this projects we created some custom objects like **mediacations** for storing which medicines are giving to that patient. **Lab reports** for storing patient lab reports. **Weight and height** object for storing patient weight and weight and **funding** object for storing patient funding information

1. Design and develop Custom business logic using **Apex triggers** and **classes**.
2. Having good hands on experience on working **Asynchronous** operations like **Batch Apex**, **Schedule Apex**, **Future** and **Queueable Apex**.
3. Experience on **deployment** by using Eclipse, workbench and **ANT tool**.
4. Experience in writing Test methods for **unit testing** and **deployment**
5. Creating and modifying Reports and Dashboards.
6. Experience in implementing business validation using **Validation rule**, **Workflows** & **Approval Process**, **Process builder.**
7. Worked on the Security model using **Profiles**, **Roles** and Sharing Model (Organizational-wide defaults & Sharing rules) settings.
8. Excellent understanding of **Roles**, **Profiles**, **Users**, **object** level security, field level security, record level security and sharing rules.
9. Experience in building **Standard Page** and **Custom Screen** and navigation using **Page Layout** and Visual force Page.
10. Written **SOQL** and **SOSL** queries in Apex.
11. Experience in Data Import Wizard and Apex **Data loader** for data migration.
12. Designed Custom Formula Fields, Field Dependencies, **Email Services**, Validation Rules, Workflows, and Approval Processes, **Page layouts**, **search layout**.
13. Experienced in analyzing business requirements, Entity **Relationship** diagram and implementing them to Salesforce custom objects, **Junction objects**, **master-detail** **relationships** and **lookup relationships.**

funding :in funding there are two types of funding coverage

1-insurance

2-complement

**Functionality:**

* When the status of funding record is changed to Denial; a Denial alert should trigger. (See Alerts section for details)
* Payer database should be loaded from GevaCare.
* Use GevaCare functionality for Denial Type/Denial Reason fields.
* Clone button should be displayed and enabled
* On the Complement record, the percent covered field should be populated with 100 when the status changes to “Active”.
* On the Complement record, a button should be added for the Complement Referral. Use GevaCare functionality as the template.
* On an Insurance record, add a Market Access button. The button should open a note and the title should be Market Access. The title field should be disabled. When the record is saved; a Market Access alert should trigger. (See Alerts section for details).

Page Layout:

What is page layout **organizes** the **buttons** **custom** **links** **visual** **force** **s**-**control** and **related** **list** or object

They also help **determine** the **which** **fields** are **visual** read only and required Use page layouts to customize the content of record pages for your users.

Salesforce has two drag-and-drop tools for editing page layouts:

1. What is PageLayout?  
A: Pagelayout controls which fields will be displays in which order they will displayed ,which formate that field should be displayed.  
  
2.How many pageLayouts can be assigned to a profile on a object?  
A: For every profile only one pagelayout is define.  
  
3. What we can controll using pageLayout?  
A:Fields.  
  
4. How to add Custom button on the PageLayout?  
A: Drag and drop  
  
5. How to add Custom button relateed list in the pageLayout?  
A:  
  
6. Find out what type of access is provided on the field when we have following combination  
           Field Level Security           Page Layout                    output?  
     Visable   Read     Required     Visable   Read   Required   
1.     Ok         No            No                No       No        No  
2.     Ok         No            No                 Ok       No      No  
3.     Ok         No            NO                Ok       OK     No  
4.     Ok          No           NO                OK      No       OK  
  
i)hidden  
ii)read/write  
iii)read  
iv)read/write/reqired.  
  
7. What is record type?  
A: Record types are use to assign more than one pagelayout to the same profile. It's also used to control list of pick list options that can be displayed for a profile.  
  
8. How to create a record type?  
A: Navigation:  
setup -->build-->create -->object-->object name-->record types-->new record types  
  
9. How to control the option in the pickilist field?  
A:Field dependency.  
  
10. How tpo control the sales process?  
A:i)orders  
    ii)dispatch  
    iii). Invoicing and credit notes  
    iv). Returns inwards  
    v). Receivables  
    vi). Bad Debts  
  
11. How to control the lead process?  
A: i)management process  
     ii)control overview material  
     iii)investment management  
     iv)strategic planning and marketing process  
     v)threat identification  
     vi)leadership  
  
12.How to control the case process?  
A: i)Quality control and quality assurance  
     ii)Quality improvement tools  
     iii)Project scope management  
     iv)Design process  
     v)Risk management process  
  
13. What is minipageLayout?  
A:when we keep curser on the record a pop-up window will open showing you the details of the record which we call as minipagelayout.  
  
14. What is the use of minipageLayout?  
A:On the minipagelayout we can add the fields that are displayed on the page layout**.**

**Workflow:**

Workflow process is a automatic process workflow process is a process automatic tool which will automatic the business flow

To set up a workflow rule you need to evaluate the criteria when the rule should run after run after this you create a **filter logic** for the rule criteria so that workflow will run you can set time trigger that executes workflow actions in a specific day

Approval process extends the work flow process user to approval the record you must specify the who will accept the record

Disadvantages :

1. You **can't call** any other workflow **within** the **workflow**
2. If any **email** is **failed** during the sending workflow **doesn’t** **send** **another** time
3. You **can't create records**
4. **Pick list** not **supported** in the **formula** in work flow
5. You **cannot** **add time-dependent workflow** actions because your evaluation criteria is "**Every time a record is created or edited**".

1-**assign** a new **task** to **user** or **role** or record **owner**

2-we can **send** **email** one or more recipients

3-**field update**

4-outbound messages

Each workflow rule **consists** of **three** **conditions**

1-created

2-create and edited

3.created and subsequently edited

Formulas workflows flows are used to streamline the process

**Formula field:**

Formula field used to build automatic calculations and formula field is a read-only

By using work flow we can achieve cross object

.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 message

What are the different workflow actions available in Salesforce?

1. Tasks.
2. Email alerts.
3. field updates.
4. Outbound messages

.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.

5.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.

6.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.

7.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.

8.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.

9.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.

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

Created, and every time it’s edited.

11.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.

12.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.

13.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.

14.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.

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

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

16.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.

16.Difference between Trigger and Workflow?

* **The trigger** can work **across** **objects** and where in you can query the object as well as you can do DMLs.
* The workflow will be only helpful to update the **same object or master object in custom master-detail relationships.**We **cannot query**from database
* **The trigger** works **before** and**after** some actions.
* **Workflows** work only **after** some actions.
* **Trigger** get fired on more actions like on **insert , update , delete and undelete.**
* **Workflow** gets fired on **insert** and **update**
* **Triggers** **can not** be updated on **production org** after being created via a managed package.
* Actions in**workflows**can be **edited, removed and new actions can be added in production org.**

**What is immediate workflow action?**  
Ans: The action which will be performed immediately after the record criteria meets.

**A workflow already exists on object. Now user want to add time dependent workflow action to it but not able to get an option to select time dependent action. What might be issue?**  
Evualation criteria is set to “created, and every time it’s edited”  
**3. What is queue?**  
A queue can hold a predefined set of objects and consists of a set of users. Any of the queue members can pick up tasks assigned to the queue. Users or Queues can be owners of records.  
While adding queue members to queue, you can add users, public group, partner users, specify role of users etc.

**APPROVAL PROCESS**

An approval process is an automated process your organization can use to approve records in Salesforce. An approval process specifies the steps necessary for a record to be approved and who must approve it at each step. A step can apply to all records included in the process, or just records that have certain attributes. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval.

**What are approval process?**  
Salesforce supports wizard based easy to configure approval process. After an object is selected, the wizard guides the user through a step-by-step setup. Approval process is triggered when a user clicks on the "Submit for approval" button.  
The approval process consists of the following steps -

* Process definition
* Initial submission actions
* Step definitions
* Final Rejection actions
* Final Approval actions

Final Recall actionsIn workflow rule,action is triggered when a record meets an evaluation criteria. Workflow rules definition does not impact existing records. Workflow rule gets applied to new record creation or edits.

**Is it possible to create parallel approval process (ability for multiple user to approve or reject a record)?**  
Yes. Parallel approval process allows specifying (upto 25) multiple approvers. The approver setting could be set to unanimous, or first action. In unanimous parallel approval process, all approvers must approve a request, before it is considered as approved.

**Validating Rules:**

**1. What are validation rules?**  
Validation rule contains an error condition and error message. If evaluation of error condition results in true value, record is not saved, and the error message is generated. Validation rules can be attached to fields. They are executed when a record is created or updated.  
  
**2. Can we avoid deletion of records through validation rules?**  
No. Validation rules fire in insert and update operation.  
  
**3. Can we bypass validation Rules?**  
Validation rules can never be bypassed. If we have upload records and need to bypass validation, then deactivate validation rule and upload records. After upload, again activate validation rule.  
  
**4. Is it possible to fire validation only for records which is being getting updated not to newly inserted records?**  
Yes, We can use ISNEW() function which will return true whenever new record is getting created in validation rule. We can use this function and check our criteria only if ISNEW() function is returning false(means record is being updated).  
  
**5. Is there is any way through which validation rule is bypassed while doing upload through data loader  but not when user is creating record from user interface?**  
Yes. Create a checkbox field as API upload and make this field hidden in page layout. Create a validation rule and in evaluation criteria first check if checkbox is false and then check other validation criteria.  
Whenever user upload record through data loader, specify value for this checkbox as true in .csv file and then upload it to salesforce. While upload, validation rule will fire and will find checkbox value as true so it will not check other criteria and system will allow to upload records.  
  
**6. What is the difference between ISBLANK() AND ISNULL()?**  
ISNULL() works only for number data type fieds, if we don't populate with value for number fields it will return true.  
ISNULL() won't support TEXT data type fields because text fields never become null.  
ISBLANK() supports both number as well as text data types.  
  
**7. What are cross object formula fields?**  
Cross-object formulae span two or more objects by referencing merge fields. By using this you can refer parent fields from child record.  
  
**8. What are different ways to make field required in salesforce?**

1. While field creation, specify required field as true.
2. Through page layouts
3. Validation rule
4. Apex trigger

**9. Admin wants to avoid the deletion of child records in master detail relationship. Is it possible to achieve this using point and click functionality?**  
Yes. First create a roll up summary field on parent which calculates the total count of child records. Now write a validation rule on parent object which checks if previous value of total count is less than new value. If yes, then display error message.  
Suppose field name is total\_count\_\_c in parent object then validation rule criteria will be:  
Priorvalue(total\_count\_\_c) <total\_count\_\_c  
When we delete the child record then roll up summary field value will get reduced by 1. System will update the parent record roll up summary field which will fire the validation rule and avoid user from deleting child record.

**How salesforce processes Validation rules.**

There are five types of Rules in **salesforce** and the priority of each rule is according to their order. **Salesforce** processes rules in the following order.

1. Validation Rules.
2. Assignment Rules.
3. Auto-response Rules.
4. Workflow Rules.
5. Escalation Rules

**Validation rule** formulas don’t refer to the following fields in salesforce.

1. Compound fields.
2. Addresses.
3. First and Last names.
4. Dependent picklist and lookups.
5. Campaign static fields.
6. Merge fields for auto numbers.
7. Compound address fields(Mailing address).

**Process Builder**

**What is process builder?**  
The Process Builder is a workflow tool that helps you easily automate your business processes by providing a powerful and user-friendly graphical representation of your process as you build it. The Process Builder’s simple and powerful design allows you to:

* Create your processes using a convenient layout with point-and-click efficiency.
* Create your whole process in one place rather than using multiple workflow rules.
* Create processes by collaborating with different teams in your business.
* Stop using Apex code to automate simple tasks.

Automated processes in the Process Builder are based on records and consist of:

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

Any change that causes a record to match the criteria can automatically trigger the action group.  
You can use the more powerful and flexible Process Builder to perform the same actions as workflow. The process builder doesn’t support outbound messages, but you can easily create one yourself with Apex. With the Process Builder, you can:

* Create a record
* Update any related record—not just the record or its parent
* Use a quick action to create a record, update a record, or log a call
* Launch a flow—you can’t schedule this action with workflow
* Send an email
* Post to Chatter
* Submit for approval

**2. What should be the condition we need to specify in process builder to specify schedule actions?**  
Below are 2 conditions:

* Only when record is created
* When record is created or edited and while define criteria select the checkbox for below setting
  + Do you want to execute the actions only when specified changes are made to the record?

**3. Is it possible to edit the process once it is activated?**  
No, You need to clone and while cloning you can create new process or create new version.  
  
**4. How to troubleshoot the errors if any issue comes in process builder?**  
Use the error messages that appear in the Process Builder and the emails you receive when a process fails to help solve problems that arise when you’re working with processes. When all else fails, look at the Apex debug logs for your processes.

* Identifying Errors in the Process Builder

The API names for criteria nodes and actions are created in the background. When you create or update processes, you might see error messages that reference those names to help you identify specifically where the problem occurred.

* Errors Received after a Process Starts Evaluating a Record

When a user performs an action that triggers a process (such as creating a record) and that process fails, the user sees a page with this error: “**Workflow Action Failed to Trigger Flow.**” In addition, the administrator who created the process receives an email with more details.

* Using Debug Logs to Troubleshoot Processes

Use debug logs to find detailed information about your running processes after they finish running. For example, if a process doesn’t seem to trigger when a record meets the process’s criteria, or if you want to understand the sequence of processes being executed.

1. **What user permission is required to create edit and view process?**  
   “Manage Force.com Flow” AND “View All Data” in profile.

  Process builder is mainly used to avoid use of multiple workflow because one workflow can have only one condition and criteria action but one   process builder can have multiple if/else condition.

Process builder allow you to update child record where as worflow doesnot.

) Process builder can call your apex code so it can send email alerts, submit records for approvals using apex code whereas workflow cannot call apex but  can send email/ outbound alert only  without code.

4)using process builder we can update child records

* Create a record
* Update any related record
* Use a quick action to create a record, update a record, or log a call
* Launch a flow
* Send an email
* Post to Chatter
* Submit for approval
* Call apex methods

But the process builder doesn’t support outbound messages.

It automatics all workflow action

We need a **trigger** to **automate** the **approval process** by using **procesbuilder** we automatic the approval process

Limitaions of process builder:

Once you activate the process you canot edit the process

Wont allow you cancel the process once when they have unwanted changes

**Ui** **does** **not** tell you **who** is **created** when it is created or id of the process also all trouble shooting must be done in the debugging log

Process builder do nor=t triggered validations ther must be a chance of invalid data

Process can not be **deleted** **after** **inactivation** **12** **hours** and it **cannot** **shoed** in the **recyclebin**

You **cannot** **change** the **order** of **criteria**

It **wont** **support** **picklist** **formula** **fields** like **isnull** or is **change**

You cannot populate the field with formula in the process builder you must have type the literals

**. What is Apex**Ans: It is the in-house technology of salesforce.com which is similar to Java programming with object oriented concepts and to write our own custom logic.

1. **What is S-Control?**  
   Ans: S-Controls are the **predominant** **salesforce**.com **widgets** which are **completely** **based** on **JavaScript**. These are hosted by salesforce but executed at client side. S-Controls are superseded by Visualforce now.
2. **What is a Visualforce Page?**  
   Ans: Visualforce is the new **markup** **language** from salesforce, by using which, We can **render** the **standard** **styles** of **salesforce**. We can still use HTML here in Visualforce. Each visual force tag always begins with “apex” namespace. All the design part can be accomplished by using Visualforce Markup Language and the business logic can be written in custom controllers associated with the Page.

**1. What is Profile?**

* Profile deals with CRED (Create, Read, Edit and Delete) permissions over Apps, Tabs, sObjects, Fields, Record Types, etc…
* We can map only one profile for one user and without mapping the profile we cannot create the user.

**2. What is role?**  
Role deals with authorization to access data.

**3. What is Permission Set?**

* To improve the permissions for the users over profiles we should go for Permission Sets.
* Example- To give additional permissions to few users who belongs to different profiles over Apps, Tabs, sObjects and fields.

**4. Is it possible to delete the user in salesforce?**  
No, once we create an user in salesforce we cannot delete the user record. We can only deactivate the user record.

**5. What is ‘Grant Account Login Access’? How to enable ‘Grant Account Login Access’**  
If we enable ‘Grant Account Login Access’ for a user then we can see ‘Log in’ button on the detail page of that user. By clicking on that ‘Log in’ button without giving that user’s username and password we can log in.

To enable the ‘Grant Account Login Access’ follow the below steps:-

* Log in as a user to whom you want to enable Log in access.
* At top right corner click on name (Which should be left to Setup) > My Settings
* User should be able to see user’s personal set up page.
* Left side, click on Personal Information > Grant Account Login Access
* User should be able to see Grant Account Login Access page
* In Access Duration column select ‘1 Year’ for all the records and click on ‘Save’ button.
* Log out and Log in as any other user in the organization then click on Manage Users > Users.
* User should be able to see list of records and verify the user to whom we enabled the Grant Account Login Access
* User should be able to see the Login link beside Edit link.
* Click on Login then user should be able to login as that user mode
* Observe at top right corner, user should be able to see Logged in as ‘Name of the user’ which should be highlighted in black color.
* Click on Logout
* User should be come back to original user’s mode, Observe at top right corner, user should not be able to see Logged in as ‘Name of the user’

**What is a profile?**

**A profile is a group /collections of settings and permissions and define what a user can do in the salesforce**

.

**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.
* A profile can assigned to many users but user can access only one profile
* **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.

### How to provide security for Meta-Data files (Schema)?

Using Profiles and Permission Sets.

**How to provide security for the Records (Instance)?**

1. Roles
2. OWD(Organigation Wide Defaults)
3. Sharing Rules.
4. Manual Sharing
5. Apex Managed sharing
6. View all.
7. Modify all.
8. View all data.
9. Modify all data.

# **. What are the Standard Profiles available in Salesforce?**

**Six (6) Standard Profiles  (EE/UE and PE)**

* **Standard User** – Can view, edit, and delete their own records
* **Solution Manager** – Standard User permissions + Can manage published solutions + Can manage categories
* **Marketing User** – Standard User permissions + Can import leads for the organization
* **Contract Manager** – Standard User permissions + Can edit, approve, activate, and delete contracts
* **Read-Only** – Can only view records
* **System Administrator** – “Super User,” can customize and administer the application

**.What is Profile?**  
ANS: Profile contains set of permissions and access settings that controls what user can do with in the organization.  
  
**2. What are permission sets?**  
ANS: A set of permissions is given to the users without changing the profile.

If you want to give the extra permissions to the user we can go through the permission set

1-you can add and remove permissions to the small subset of users at ant time

2-you can add multiple permissions sets to the given user

3-use permissions set when user need more permissions

4-if a lot of users in the profile need more permissions you can create a profile add the permissions to that users

**3.What is OWD?**  
ANS: OWD'S are base line record level security for objects in the organization.  
It is used to restrict access to data.  
  
**4.What is Roles?**  
ANS: A role controls the level of visibility that users have to an organization's data.  
  
**5.What is User?**  
ANS:The people who have authenticated username and password to login to the salesforce successfully.  
  
**6.What is Sharing Rules?**  
ANS:These are used to override the OWD permissions.  
Sharing rules are two types  
1.Based on record owner  
2.Based on createria.  
  
**7.What is the role hierarchy?**  
ANS:Role Hierarchy states that higher hierarchy person can see lower hierarchy person records.  
  
**8.Can you override profile permissions with permission sets(i have defined some permissions in profile,i am trying to use permission sets for the same object,can i override permissions for a particular object in the permission sets over to the profile?**  
ANS:No. Permission Sets are used only to extend the Profile permissions. It never overrides.  
  
**9. I want to have read/write permission for User 1 and read only for User 2, how can you acheive?**  
ANS:Create a Permission Set with read/write and assign it to User 1.  
  
**10. I have an OWD which is read only, how all can access my data and I want to give read write access for a particular record to them, how can i do that?**  
ANS:All users can just Read the record.  
Create a Sharing Rule to give Read/Write access with "Based on criteria" Sharing Rules.  
  
**11.What is the difference between role hierarchy and sharing rules?will both do the same permissions?**  
ANS:Role Hierarchy states that higher hierarchy person can see lower hierarchy person records.  
Sharing Rule is used to extend Role Hierarchy.  
  
**12. Is it possible to delete the user in salesforce?**  
ANS:No, once we create an user in salesforce we cannot delete the user record. We can only deactivate the user record.  
  
**13.How to provide security for Meta-Data files (Schema)?**  
ANS:Using Profiles and Permission Sets.  
  
**13. How to give permissions to two fields for different users who belongs to different profiles?**  
ANS:Permission set  
  
**14. How many users are there in your project salesforce instance?**  
ANS:1000 (It will depends upon the number of licenses taken by the client, it will be like upto 4000 like that based on the client)  
  
**15.What is Grant Access Using Hierarchies?**  
ANS:In OWD we have Private but your higher position persons should see that time we go for Grant Access Using Hierarchies.  
  
**16. How we can change the Grant access using role hierarchy for standard objects?**  
ANS:Not possible.  
  
**17.What is manual sharing?**  
ANS:Manual sharing is to share a record to a particular user manually.  
Go to detail page of record and click on manual sharing button and assign that record to other user with Read or Read/Write access.  
Manual Sharing button enables only when OWD is private to that object.  
  
**18.Can you tell the difference between Profile and Roles?**  
ANS:Profiles are used for Object level access settings.  
Roles are used for Record level access settings.

**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.

**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.

**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.
3. **. What is Access at the Role Level?**
4. Access at the role level depends upon the organization wide defaults.

**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

**. 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.
6. **Best Practices of Creating Contact Sharing Rules?**
7. Organization wide default settings are used to set red, write, read/write permissions

Relationship:

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

Master-Detail Relationship

* 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.

**Child record must have a  associated parent**.

In Master-Detail Relationship the “child object” or “detail object” must have a parent.

**Cascade record-level security.**

Cascade record level security means the child record inherits cascade level security from the parent.So the user can view a parent record and he will be available to view associated child object to that Parent object.

**Cascade record deletion.**

Cascade deletion in salesforce means child records will be automatically deleted when parent object is deleted.

**Roll-up Summary fields can be established.**

In Master-Detail Relationship we can create **Roll-up Summary fields**.Roll-Up-Summary fields are those which are used to summarize data with any associated child object.

**Standard objects can not be a detail object.**

In Master-Detail Relationship we can not use Standard objects as child object.

Lookup Relationship.

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

Many-Many Relationship.

* 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.

**Reports :**

Report type=which object

Fields =which field

Filters =which filter we want to use

Format=which format do u need

1-tabler

2-summary

3-matrix

4-joint

Folder =which folder we want to save

**Dashboard**

Data source:reorts dat we r created

Components:graph or chat

Max 20 reports

**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 : [**http://www.crmsalesforcetraining.com/creating-dynamic-dashboards-salesforce/**](http://www.crmsalesforcetraining.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**.

**Order of execution:**

. **Old record loaded from database** (or initialized for new inserts)  
  2. **New record values overwrite old values**  
  3. **System Validation Rules** (If inserting Opportunity Products, Custom Validation Rules will also fire in addition to System Validation Rules)  
  4. **All Apex before triggers** (EE / UE only)  
  5. **Custom Validation Rules**  
  6. **Record saved to database** (but not committed)  
  7. **Record reloaded from database**  
  8. **All Apex after triggers** (EE / UE only)  
  9. **Assignment rules**  
10. **Auto-response rules**  
11. **Workflow rules**  
12. **Processes**  
13. **Escalation rules**  
14. **Parent Rollup Summary Formula value updated** (if present)  
15. **Database commit**  
16. **Post-commit logic** (sending email).

Action :will be redirect to the another page by using page reference return type null