SALESFORCE ADMINISTRATOR

INTERVIEW QUESTIONS AND ANSWERS

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.

2. What is a Role?

Roles are technically optional, but it's a good practice to use them. Roles are predominately about sharing records with 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) 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.

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 is that you can give users slightly different permissions without having to create separate profiles. This reduces the overhead for administrators. 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. You can also group multiple permission sets together by job function via Permission Set Groups for simpler and more consistent administration. Salesforce and Trailhead have useful articles on the subject.

4. What is changing regarding Profiles and Permission Sets?

Salesforce have announced that permissions on profiles will be retired as end of life (EOL) as of the Spring '26 release. Profiles will still exist; however, permissions on profiles will be retired and permissions will be available only on permission sets.

What will remain on a profile:

- One-to-one relationships: Login hours'/IP ranges
- Defaults: Record types, apps
- Page layout assignment: The future is App Builder/Dynamic Forms, so we will not invest in bringing page layout assignment to permission sets.

What will be available only on permission sets after EOL:

- User permissions (system and app permissions)
- Object permissions (object Create, Read, Update, and Delete [CRUD])
- Field permissions (field-level security [FLS])
- Tabs
- Record types (not defaults)
- Apps (not defaults)
- Connected app access
- Apex classes
- Visualforce pages
- Custom permissions

Administrators can now begin to change the security model in preparation for the ultimate change by migrating permissions from profiles to permission sets and enabling Field-Level Security for Permission Sets During Field Creation under User Management Settings.

5. How are Public Groups and Queues different?

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 with users of a similar level, say directors. As directors are probably spread throughout the organization, they aren't likely to be under each other in the role hierarchy. However, an admin could create a public group with all of the director roles in it and share records with the group. 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 that whoever is available first handles it. Queues are available on all custom objects and many standard objects.

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.

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. The ability to have roll-up summary fields is the top reason why you'd consider a master-detail relationship.

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 analyse the data. For example, you could store numbers in text fields, but that would make performing calculations on them needlessly challenging.

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.

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.)

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 labelled "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, and each of them will be connected to many classes.

13. What is Flow?

Flow is an admin's primary declarative automation tool. Flow can perform actions such as creating, updating, and deleting records, as well as sending emails, outbound messages, launching other flows, and calling Apex code. Flow is also the only declarative automation tool that allows admins to build custom screens to interact with users and can greatly improve the user experience. The most common ways for flows to be triggered are via record changes, screens, or on a schedule. Flow Trigger Explorer allows admins to determine the order in which flows run so that automation can be efficient and not create conflicts. There's also a tool called Flow Orchestrator that allows admins to develop multi-user, multi-step automation.

If you're interested in learning more, don't forget to check out the following resources:

- Build Flows with Flow Builder
- Automate Your Business Processes with Salesforce Flow
- Flow Orchestration Basics

14. What is happening with Workflow Rules and Process Builder?

Salesforce has announced the retirement of workflow rules and process builder. Both declarative tools were predecessors to Flow and are no longer necessary (now that Flow can do everything they can do!). It's important to know that existing workflow rules and processes continue to operate as they have (and can be edited and activated/deactivated) but can no longer be created as of Winter '23 and Summer '23, respectively. There are Migrate to Flow tools available, and admins should thoroughly review options and considerations. Because an admin can expect to work with orgs that have existing workflow rules and processes in place, understanding them remains vital. For further reading, check out Workflow Rules vs. Process Builder (Feat. APEX & Flow) and Process Builder vs. Flows – Become the Ultimate Admin.

15. What's going on with AI?

Salesforce have had a suite of Einstein AI products for years, which have largely served as analytical and predictive tools. Recent AI advancements have led to GPT tools, which are generative AI – meaning that they can create auto-generated content. Probably the most important thing to know is that GPT products use what is called large language models (LLMs) to learn. Salesforce's AI Cloud uses the Einstein GPT Trust Layer, which allows data within a Salesforce org to be used by the AI while protecting it. Several GPT products are now available, and we can anticipate more to come at Dreamforce 2023 and beyond.

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.)

17. What is Apex?

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

18. What is Experience Cloud?

Experience Cloud (formerly Community) is a way to 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 can 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. Check out the Experience Cloud Basics module for further context.

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 many use cases and do so 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. Admins can combine Experience Cloud, guest users, and screen flow to solve some fairly complex use cases, such as the National Aquarium reservation and education experience applications.

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.

21. What is a Change Set?

While not exactly the same as an AppExchange package, a change set is quite similar. It's a collection of components you want to migrate between related orgs (generally from a sandbox to production, but also sandbox to sandbox and other configurations). Salesforce has also launched the DevOps centre, which "makes it easier to collaboratively build, test, and deploy custom solutions across Salesforce – including automations, applications, and experiences – that connect to real-time customer data."

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 initially (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.

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 centre – 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 creating a new object, even if I only plan to use one type. It's so much easier to add a second one when you need them than to go back and introduce records types to an object that already has records.

24. What are List Views?

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

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. Dashboards allow for visualizations of the data.

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 are editable or required. Additionally, page layouts control buttons, related lists, and some other elements.

27. What are Lightning Components?

Lightning components are where the magic of Lightning Experience really comes alive. They are modular features that 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.

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 also other types of Lightning pages: 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.

29. What is the Data Loader?

There are many 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's free and provides all of the options you need. You may want to take a look at the 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 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 use 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.

31. What do you know about Salesforce?

Salesforce has become a leader in CRM development. It is a single, integrated customer relationship management (CRM) platform that connects businesses with their customers. Salesforce provides a standard shared picture of every customer to all the departments, including marketing, sales, commerce, and service, and also allows users to store the data on a secure Cloud. Not only does the platform include a number of services and tools for relationship management, but it also assists in app development. As a result, Salesforce allows you to operate your business from anywhere.

32. Explain Salesforce Admin characteristics.

Salesforce Administrators manage and maintain the Salesforce platform, making them an integral part of an organization's technology team. Successful Salesforce Administrators possess technical proficiency, analytical skills, effective communication, problem-solving skills, attention to detail, and a commitment to continuous learning. They use data to make informed decisions that optimize the platform's performance and drive business success. Salesforce Administrators troubleshoot and solve problems related to the platform and ensure that the data is accurate and up-to-date, as it forms the basis for critical business decisions. They collaborate effectively with different teams and explain technical concepts in simple terms.

33. Expand and explain CRM.

The expansion of CRM is 'Customer Relationship Management.' CRM is an application that helps automate systems 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

34. 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.

35. What are the available portals in Salesforce?

Three types of portals are available on 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 by non-partner users.
- Self-service portal: Customers will be able to search for details about the organization using this portal.

36. 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

37. 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. The profile serves as another way to manage particular records.

There are two types of profiles, which are enumerated below:

- 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

38. What is the difference between Profile and Role?

The difference between Salesforce Profiles and Salesforce Roles are –

- Profiles: Object and field-level access may be created using profiles, such as general permissions, tab-level permissions, read & write permissions, and so on.
- Role: We may offer record-level access using roles, such as organization-wide defaults, Role hierarchy, sharing rules, and manual sharing. Simply put, record-level access is influenced by responsibilities.

39. 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

40. What are the default index fields?

Salesforce's default indexed fields are:

- Primary Keys: Name, ID, and owner fields)

- Foreign Keys: Lookup and Master-Detail Relationship Field

- Audit Dates: LastModifiesDate and SystemModstamp

- Custom Fields (only marked as External ID or unique)

41. What is Field Dependency?

In Salesforce, Field Dependencies are filters that will let the users modify their content and control the value of one field dependent on the value of another. There are two other fields in Field dependency which are.

- Controlling Field.

- Dependent field.

42. Mention various types of sharing rules in Salesforce.

There are a few sharing rules in Salesforce available which are as follows:

- Account sharing Rule.

- Case Sharing Rule.

- Contact Sharing Rule.

- Custom Object sharing Rule.

- Lead Sharing Rule.

- Opportunity sharing Rule.

43. 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.

The functions of the roll-up summary field are mentioned as follows:

- Count

- Sum

- Min

- Max

44. 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 sub report.

45. Mention the ways to share a record.

In Salesforce, there are 5 ways we can share records

- Role Hierarchy

- Organization Wide Defaults

- Manual Sharing

- Criteria-Based Sharing Rules

- Apex Sharing

46. Do you know about Bucket fields in Salesforce reports?

Without the need for any sophisticated algorithms or custom fields, a bucket field allows you to combine related data together by ranges and segments. Bucketing is a method of grouping, filtering, and arranging report data. You must define numerous categories (buckets) that are used to group report values when creating a bucket field.

47. 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

48. What is Workflow in Salesforce?

Workflow in Salesforce is business logic that helps you to automate your organization's normal processes and procedures, saving you a significant amount of time. Workflow allows records to carry out tasks like changing data or notifying individuals or external systems. We can automate tasks like assigning tasks, sending emails, updating fields, and sending outbound messages.

49. 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

50. What are the various types of relationships available in Salesforce?

There are the various relationship types in Salesforce that users can create. Which are:

- Self-relationship
- Lookup
- Indirect lookup
- External lookup
- Many-to-many (junction object)
- Hierarchical
- Master-detail relationship

51. 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:
  o The workflow rule is active
  o The workflow rule is included in the package

52. Mention some CRM providers

The popular CRM providers are:

- Oracle CRM
- Microsoft Dynamics CRM
- Salesforce CRM
- SAP CRM
- NetSuite CRM
- Sage CRM
- SugarCRM

53. 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

54. What is the Formula field?

A Formula field is a read-only field that is coupled with a formula or expression from which its value is calculated. With the corresponding modification in the formula or expression, the value of this type of field is immediately changed. This field can be created using both standard and custom objects.

55. What is Data Loader?

Salesforce Data Loader is a client application that allows you to import or export data in bulk. One can insert, update, remove, or export Salesforce records with this tool. Data Loader reads, extracts, and loads data from comma-separated values (CSV) files or a database connection for importing data. It creates CSV files for exporting data.

56. When do we use Data Loader?

We use a data loader for the following situations:

- When we need to insert, update, delete, or upset large volumes of records in Salesforce (more than 50,000 records).

- When you need to load data into an object that is not yet supported by web-based importing, such as the Chatter free data license object or custom objects with complex relationships.

- When you want to save multiple mapping files for future use or share them with other users.

- When you want to export data from Salesforce for backup or migration purposes.

- When you want to prevent duplicates by uploading records with a unique external ID field.

57. What are the Data management tools in Salesforce?

There are two data management tools available in Salesforce which are:

- Data Import Wizard
- Data Loader

58. 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:

- Aliquot
- Accepts
- Akamai
- AppDynamics
- Apprenda

59. 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 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

60. 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
- Cloud scaling
- Blue lock
- Eucalyptus

61. 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 salesforce tools in the edition that help customize it according to business needs.

- Professional: This edition is built for businesses that require the most 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 helps 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 Salesforce Lightning Platform. It provides tools that allow developers to customize the Salesforce platform and

integrate it with other technologies and applications. Also, the edition consists of those features that are present in the Enterprise edition.

62. What is meant by TAB in Salesforce?

Salesforce tabs allow users to see information at a glance. In the program, it shows the data of objects and other web material.

Types of TAB in salesforce are:

- Standard object tabs
- Custom object tabs
- Web tabs
- Visualforce tabs

63. 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 to 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

- o Tab settings
- o Assigned apps
- o Object permissions
- o Field-level security
- o Apex classes
- o Visualforce pages

64. 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 the provider	For upgrading, we should replace the previous version with the new version
Org Limits	There is no limit for the usage of apps, tabs, and objects	The packages set limits for the usage of apps, tabs, and objects

65. How can we clear the time-based workflow action queue?

There are two ways to clear a time-based workflow action queue:

- First, you can make false criteria.
- Or you can clear by removing actions that are rescheduled from the queue.

66. What is OWD and Do you know how many accesses are available in OWD?

The default level of access to data records for all users in an organization is defined by the Organization's defaults. Defaults are used to limit data access across the organization (Records). For both Standard and Custom Objects, Organization-Wide Defaults (OWD) can be set.

In Organization-Wide Default, around 13 various accesses are available. They are as follows:

- Public Read Only.
- Public Read/Write.
- Public Read/Write/Transfer.
- Public Full Access.
- Private
- View Only.
- Use
- Hide Details.
- Hide Details and Events.
- Show Details.
- Show Details and Events.
- Controlled by parent
- No Access.

67. What exactly is a trigger? What are the different kinds of Triggers?

Triggers are the custom actions done in Salesforce before and after changes are made to a record. Insertions, updates, and deletions are examples of these activities. Triggers may be used to call Apex, and a trigger is just Apex code that runs before and after the next set of activities.

In salesforce, there are two types of triggers available which are:

- Before trigger, used to update or validate records before saving into the database
- After trigger, used to access field values that are set by the system.

68. What is cloud Computing?

Cloud computing is a way to access information and applications online instead of having to build, manage, and maintain them on your own hard drive or servers. It's fast, efficient, and secure. Simply put, cloud computing is a way of accessing services on the internet instead of on your computer. You can use the cloud to access applications, data, and development tools from virtually anywhere. Whether you're working on your phone from a crowded train in Chicago or on your laptop at a hotel in Hong Kong, you can access the same information because it all lives online.

69. What is Paas, Saas, Iaas?

- IaaS (Infrastructure as a Service) – Here, cloud service providers largely focus on infrastructure services like hosting, server, storage services, etc.

- SaaS (Software-as-a-Service) – SaaS is a software delivery model in which software is licensed on a subscription basis and hosted centrally.

- PaaS (Platform-as-a-Services) – This is a category of cloud computing services that provide a platform allowing customers to develop, run, and manage apps.

70. What is Sandbox and the Type of Sandbox in Salesforce?

A Salesforce sandbox is an isolated copy of your organization's production environment that is used for development and testing purposes. Your production environment has your live data and active users logging in. A Salesforce sandbox will always include a copy of your production organization's metadata

There are 4 types of Salesforce sandbox environments.

- Developer Sandbox
- Developer Pro Sandbox
- Partial Copy
- Full Sandbox

71. What is Object in Salesforce?

- Objects in Salesforce are used as database tables that are used to store information about an organization. We have two types of objects in salesforce, they are.

- Standard Object: These are the objects provided by the salesforce, which include contacts, accounts, opportunities, leads, cases, campaigns, products, contracts, dashboards, etc.

- Custom Object: This includes the modifications made to the Salesforce by users. It stores the essential and unique information of an organization. Custom Object includes page layouts, relationship to other objects, custom user interface tab, custom fields, etc.

72. What is a Master–Detail relationship in Salesforce?

Master-Detail relationship is a relationship between a parent and child where the master represents the parent and the detail represents a child. This relationship can be used when we want to control the display of detail records based on the value present in the master record. The master object completely takes control of the behaviour of the Detail object. The survival of the child is dependent on the parent, because if the parent gets deleted then the child automatically gets deleted. You can create Roll-up summary fields in master records which will calculate the SUM, AVG, and MIN of the child records. Consider an example of a courier company model, where a delivery schedule is always linked to a delivery location. If we delete a delivery location from our list, then all the related delivery schedules should also be removed. Such a dependency can be achieved only through a Master-Detail relationship

73. What is a junction object in Salesforce?

Junction objects are useful in building many-to-many relationships between objects in Salesforce. Take an example of recruiting application, where a position for a job is linked to many candidates or a candidate can apply for many other jobs. Here object "job application" is referred to as a junction object in order to connect the data model. In this example, "job application" is the junction object.

74. How many ways to create What is a Roll-up Summary field

If the default Max Roll-Up Summary Field limit per object increased from 10 to 25 in the Winter '16 release. Hard-coded limit for roll-up summary fields is 40 per object.

75. What is the difference between role and profile?

The main difference between role and profile is given below –

Role	Profile
The role helps in defining data visibility for a particular user.	A profile sets the limitation for what a user can do in the organization.
Based on the hierarchy, a role defines which user data a user can see.	Profile defines permissions
Defining role to a user is not mandatory	Defining profile is mandatory
Roles provide a feature to control access to records by impacting reports. For example, "My Teams" filter. Roles function if a security model (OWDs) of an organization is set to private.	Profiles help to decide record privileges i.e. assuming the user can observe the record, it concludes what the user can function, edit, delete, view on that record. It controls other system privileges like export data, mass email, etc.

76. What are Permission sets?

A Permission Set is a collection of settings or permissions that is used to give access to numerous tools and functions for the user. You can use permission sets for different types of users to extend functional access without changing their profiles. Instead of creating a separate profile each time, you could easily create a Permission Set.

77. What is use of muting permission set in permission set group

By Adding Muting Permission in permission set group we can switch off/turn off/remove particular permission/Setting within a group without affecting the rest of the permission sets within the group.

78. What are Audit Fields in Salesforce?

Audit Fields in Salesforce are special fields that track information about your records that can be valuable for audit purposes. Typically, these fields include: CreatedByID. Created Date

79. What is an Audit trail?

The Audit trail in Salesforce is a unique feature that helps in tracking the changes that have been made in the organization by you and other administrators. It would be helpful for the organization with more administrators. This audit trail shows you the information of the twenty most recently made changes in your organization.

80. What is a Queue in Salesforce?

Prioritize and assign records to teams that share workloads. There's no limit to the number of queues you can create, and you can choose when queue members receive email notifications.

81. What is a Public Group?

Groups are sets of users. They can contain individual users, other groups, the users in a particular role or territory, and/or the users in a particular role or territory plus all of the users below that role or territory in the hierarchy.

82. What is Salesforce Admin?

A Salesforce administrator is an individual who specializes in the Salesforce CRM (Customer Relationship Management) system and the products that it provides. It is their responsibility to administer Salesforce systems, train staff on Salesforce products, and maintain sales databases. Simply put, the Salesforce admin allows users to leverage the Salesforce platform in the most reductive way possible. It is a Salesforce Admin who truly understands how to configure the platform to achieve the company's goals.

83. What are Salesforce reports?

As part of the management process, the reports are used to track progress towards the company's various goals, control its expenditures, as well as increase its revenues. Reports play a crucial role in forecasting trends and can therefore increase profits. Reports can be created in Salesforce.com in a variety of ways and can be scheduled as well. You can organize, view, and analyse your data with Salesforce's suite of analytic tools.

84. What are the different types of report formats in Salesforce?

Report formats in Salesforce can be classified into four different types as follows:

* Tabular Reports: This is the most basic of all report formats and it simply displays the records in a table without a grand total. Tabular reports are ideal for when you need a simple list or a list of items without a grand total.

* Summary Reports: As the name implies, this type of report displays a listing of data with groupings and subtotals at the bottom.

* Matrix Reports: Unlike other types of reports, this one gives you the option to group records both by row and by column. Furthermore, this report can be used to generate dashboards as well.

* Joined Reports: These types of reports allow us to create different views of the data from the different types of reports. In a joined report, the data are organized into blocks. Each block is a sub-report containing its columns, own fields, sorting, and filtering.

85. Explain Database.com.

Database.com is the primary enterprise database storage platform for Salesforce, and Salesforce data is stored in the cloud via this platform. The database.com product is a vast data storage facility that allows users to safely store millions of records, retrieve them for use in developing apps, and create flawless transactions in a fraction of a second. Database.com provides a powerful cloud infrastructure that provides a means to efficiently store, retrieve, and manipulate information. Listed below are some of the valuable features that Database.com provides:

- It offers storage space for images, videos, and documents.

- Provides relational data capabilities, such as tables, fields, triggers, queries, relationships, and search capabilities.

- Provides user management functionality.

- Improved enterprise search engine services and security rules to ensure that the data remains secure.

86. What do you mean by page layout and record types?

- Page Layout: With Page Layouts, Salesforce allows you to control how Salesforce pages are arranged and displayed. You may be able to control the positioning of fields, Buttons, Custom links, S-controls, Visualforce, and related lists on any of the object record pages. Also, page layouts determine which fields on object record pages are marked as read-only, visible, or required.

- Record Types: Records types allow you to display different processes, picklist values, and object layouts to different Salesforce users. The record type offers many benefits, however, if it is not implemented correctly, it can result in added complexity for users and administrators.

87. In what ways are files, images, and documents stored in Salesforce.com? List them out.

Salesforce.com allows us to store files, images, and documents in the following ways:

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

88. What is Salesforce Chatter?

Chatter is a Salesforce application that makes it easy for your users to communicate, collaborate, and share information in real-time. Chatter can be used by individuals of all roles and locations in the organization to connect, engage, and motivate them to work efficiently.

89. Explain the Approval process.

Approval processes are types of workflows that require work to pass through a series of steps to be approved. This process typically involves reviewing the work and approving or rejecting it by various departments with employees from different positions involved in the process. After this, the workflows in both directions, either back to the previous step for editing, or on to the next step for further approval, depending on whether the work has been accepted or rejected by one department. Currently, many companies use computers to automate their approval processes, however, some firms still use manual approval procedures, such as passing paper documents from department to department.

90. What do you mean by time-dependent workflow? Write its limitations.

When working on a real-time project, there are some situations where we do not need to execute the task immediately. Time-dependent actions can help in these cases. Time-dependent actions are performed at a specific time, such as 10 hours or 10 days (time triggers) before the closing date of a record. The workflow rule evaluates the record after that period has passed to ensure that it still meets the rules. If so, the workflow rule performs those actions. In Salesforce, a time trigger indicates after how many hours or days we want this action to be performed.

- Minutes and seconds are not supported by time triggers.
- A time trigger cannot be added or removed if:
- The workflow rule is currently active.
- The package includes the workflow rule.

91. What are the various workflow actions available in Salesforce?

Salesforce offers the following workflow actions:

- Task: It is a simple way of assigning a task to an individual user, a team member, or a role. The assignee can be notified via email when a task is automatically assigned.
- Email Alert: It uses an email template to send automated email messages. Salesforce allows users to create an email template that can be used to send emails when they need to.
- Field update: Field updates are used to automatically change the value of a field on a record that was initially triggered by the workflow rule.
- Outbound Message: Outbound messages are those that are sent to a designated endpoint, such as an external service. Listening to these types of messages is possible using a SOAP (Standard Communication Protocol System) API.

92. Mention how we can share a record.

A record can be shared in five different ways, as follows:

- Manual Sharing.

- Apex Sharing.

- Role Hierarchy.

- Criteria Based Sharing Rules.

- Organization-Wide Defaults (OWD).

93. Explain the permission set in Salesforce?

Permission sets are essentially collections of settings and permissions that allow users access to certain features and tools. In other words, permission sets can extend the functional access of users without modifying their profiles. A Salesforce user can only have one profile, although depending on the Salesforce edition, they may have several permission sets. Permission sets may be assigned to various types of users regardless of their profile.

94. What is Salesforce?

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.

95. What is CRM?

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.

96. What are the duties of a Salesforce Administrator?

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

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

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)

98. Name at least six CRM providers.

CRM providers include:

- Microsoft Dynamics CRM

- NetSuite CRM

- Nimble

- Oracle CRM

- Sage CRM

- Salesforce CRM

- SAP CRM

- SugarCRM

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

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).

100. Outline Salesforce's available portals.

Salesforce has three available portals:

- Customer portal

- Partner portal

- Self-service portal
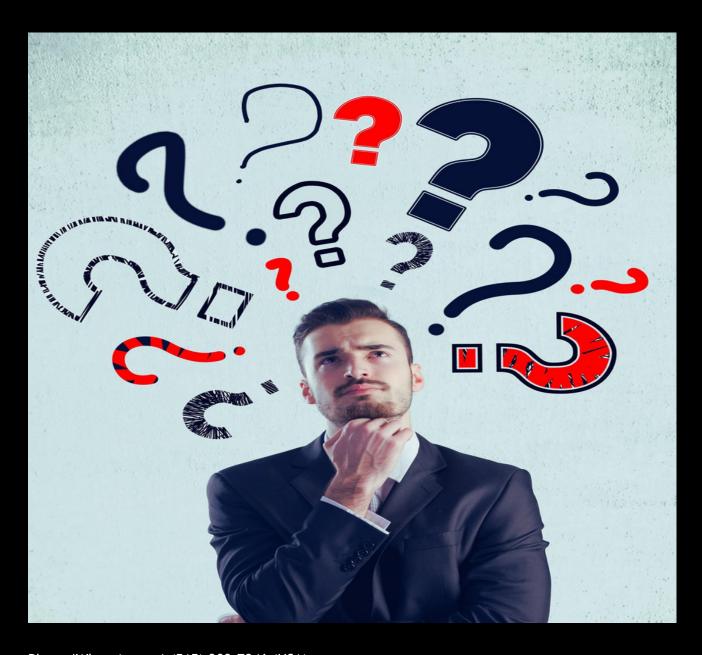
Corporate Training Course Catalog
https://bit.ly/salesforce-course-catalog

Salesforce Learner Community
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Get any Salesforce Video Training
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