

Q-20) what is Rollup Summary Field?

→ Q-20) Rollup Summary Field of calculates

Sum, count, min or max on a child
object in a master-Detail relationship.

② A read-only field that displays the
sum, minimum or maximum value of
a field in a related list.

③ This field also can count all records
available in related list.

④ Rollup Summary field is always created
on parent object.

Q-21) Can we convert Lookup to master-Detail?

→ It is possible but first you need to populate values
in lookup field on each record available

Q-22) Can we convert Master-Detail to Lookup &

→ Yes, but if you haven't created Rollup
Summary fields then you need to delete
those fields before converting master-detail
to lookup.

Q-23) what is Aggregation object?

→ Aggregation object is a custom object
that allows many-to-many relationships
between two objects.

Q-24) Many-to-many Relationship?
This can be implemented with the help of junction object.

Example →

Object 1: class → student

Object 2: student → teacher

Junction Object: → Create lookup/master-detail field: one related to class and another related to Student object

Q-25) What is a Formula Field?

A Formula Field is a read-only field that calculates values dynamically.

Q-26) Difference b/w picklist and multi-select picklist?

Picklist → User can select one option.

Multi-select → User can select one or more options together.

Q-27) What is Global picklist valueset?

Global picklist valueset can be used by any picklist or multi-select picklist in any object.

Q-28) What is Field Dependency?

Creates a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.

② The field that drives filtering is called "controlling field". Standard and custom checkboxes and picklists with at least one and less than 300 values can be controlling fields.

① The field that has its values filtered is called the "dependent field". Custom picklists and multi-select picklist can be dependent fields.

Q-29) What is Page Layout? →
→ Page layout is used to display field values for records.

Through page layout we can control Related list as well.

Q-30) What is Compact Layout? →
→ Compact Layout is used to display selected Fields and buttons on the page.
It is also shown when we hovers over the lookup relationship field.

Q-31) What is Related List? →
→ When lookup and master-detail relationship fields are created then on parent object selected lines will be created. Through Related List we can view child object record from parent object.

Q.22) i) Types of Lighting Pages ?

- ① App page
- ② Home page
- ③ Record page

Q.23) Component Visibility

→ Component visibility helps to apply filters / criteria to control whether component should be visible on the page or not.

Q.24) what is validation rule ?

→ A validation rule ensures data integrity by restricting invalid data entry using a formula.

To apply custom validation we can build validation rules.

Validation rule fires when the defined criteria matching upon record insert, update & delete.

Q.25) what are Duplicate Rules and Matching Rules?

→ Matching Rules → define criteria for finding duplicate records.

Duplicate rules → determine what happens when a duplicate is found (allow, alert or block)

Matching Rule → Hence we need to set the criteria for duplicate check.

Duplicate Rule → Prevent creation of duplicate records, it shows either warning or block record creation and update in case of duplicates. We can create reports on duplicate record created with no specific field for reporting.

Q-35) what is List view?

- ① List view shows lists of records available under object, user can choose which fields will be displayed in list view. A
- ② User can also apply sharing & filters on list view. B

Q-36) what is Record Type?

- Record type helps to launch different page layouts, standard con shows different picklist, variations for different layout variations.

Q-38) what is a Schema Builder?

Schema Builder is a drag and drop tool for visualizing objects or relationship.

- ① Schema builder helps to view objects in pictorial representation in a graphical way.
- ② One can see the relationship between multiple objects.
- ③ One can create objects and fields through Schema builder as well.

Q-39)

what is Email Template?

Email Template contains passage and merge fields that can be sent through automation tools like flow or triggers.

Types: classic Email template (Text, HTML, Custom, VF).

Lightning Email Template.

Q-40)

Global Action vs Object Specific Action

Global Action: One can execute operation without open any record on object.

Object Specific Action: can be executed through records of an object.

Q-41)

What is Sales process?

→ One cannot control stage picklist values of Opportunity object through record type.

① So one can Create a Sales process to control stage picklist values of Opportunity object for different Record types.

Q-42)

What is Support process?

→ One cannot control stage picklist values of Case object through record type.

① So One can Create a Support process to control stage picklist values of case object for different Record types.

Q-43) what is Isolated lead process ?

→ ① One cannot control status picklist values of lead through record type.

② So one can create a lead process to control status picklist values of lead, separate for different record type.

Q-44) What is Setup Audit trails?

→ ① Setup Audit trails shows a list of changes done by user in the org in different components.

② One can download post 6 months of changes to analyze.

Q-45) Different ways to make a field required.

→ ① Field itself has required.

② Page layout has required.

③ Validation Rule

④ Trigger.

Q-46) Different ways to make a field read only.

→ ① FLS (Field Level Security)

② Page Layout

③ Validation Rule

④ Trigger.

Q-47) what is Help Text

→ ① Help text shows additional information about a field.

Q) It is optional to have help text for fields.

Q-4) What is Data Import Wizard?

A) It helps to import data from excel / csv format into Salesforce.

① One can find this in Setup.

② One can import upto 50,000 records at a time.

③ One can perform insert, update & upsert operations.

Q-5) What is Data Loader?

① It helps to import data from excel / csv format into Salesforce.

② One has to install it in the Computer through Setup.

③ We can import upto \$100,000 records at a time.

Q-6) Operations in Data Loader

Insert

Update

Upsert

Delete

Export

Export All (includes deleted record)

Data Sharing & Security

Q-S1) what is sharing and security in salesforce?

→ ① Data Security is important because you need to control what a user or group of users can see in the org or application.

Salesforce provides layered sharing model.

- ② You can easily assign different data sets to different group of users.
- ③ You can control access to your whole org, any specific object, fields and records.

Q-S2) what is sharing & security model?

→ ① Organization Level Security

② Object Level Security

③ Record Level Security

④ Field Level Security

Q-S3) what is the organization level security model?

what is the Salesforce Security Model?

→ The Salesforce Security Model includes:

- ① Organization Level Security → IP Restriction, Login Hours.
- ② Object Level Security → Profile & Permission Sets.
- ③ Field Level Security → Field visibility restrictions.
- ④ Record Level Security → Own, sharing rules, role hierarchy.

Q.54) What is Organization Level Security?
 → IP restriction, login hours.

- ① Maintain a list of authorized users.
- ② Set password policies.
- ③ Limit login to certain hours and locations
- ④ Limit IP addresses from which users can login.
- ⑤ Limit the times at which users can log in.

Q.55) What is Object Level Security?

→ Profile & permission set.

- ① You can control object level permission for both standard & custom objects.
- ② You can set permission for a particular object.
- ③ You can give permission to view, create, edit, and delete any records of that particular object.
- ④ You can control object permission using profile and permission set.

Q.56) Field Level Security?

- ① You can restrict access to certain fields in Salesforce even if user has object level access.

- ② You can make a field visible to a particular user and can hide that from other user.

Field visibility restriction.

(ii) you can give Read or Edit permissions to a field. If else you don't give both, then that field will not be visible.

(iii) Field Level Security can be configured using profile-level permission. Set rules based on user's role.

(Q-57) What is profile & permission set in Salesforce?

- ① Profile defines base level permissions for a user, including access to objects, fields, & tabs.
- ② Permission sets → are used to extend base permissions to specific users without changing their profile.

(Q-58) What is profile?

- ① A profile is a collection of settings (privileges & permissions).
- ② Profile setting determines which data the user can see and the permission level it has for that data.

③ A profile can be assigned to many users, but a user can have only one profile at a time.

Profile → defines base level permission for a user, including access to objects, fields & tabs.

Post last slide on how to configure field-level security.