

Lead

Q) What is lead & how can it help?



Lead → Lead means someone who interests in your product or service, or also called potential customer.

- Converting lead to loyal customers will provide success within business.

Q) Is it mandatory to convert lead to opportunity?



No, it's up to you.

Q) What is lead field mapping?



Lead field mapping → means Leads are connected to the account, contact & opportunity object in help of map lead field called lead field mapping.

Q) What is custom field mapping?



Custom field mapping → custom field mapping means mapping of the custom field to lead field.

Q) Why do we do custom lead field mapping?

Because whenever you created any custom fields in account, contact or opportunity then it is mandatory/required to create same custom fields in lead object also. otherwise the data from the lead won't be converted into account, contact or opportunity.

diff between acc & lead is that acc has more fields

And if one is mandatory to do lead field mapping in each other.

Q) What are the steps to do custom lead field mapping?

First of all create custom fields in Account & try to remember datatype & length of datatype.

Then create same custom fields in Lead.

Then go to lead object.

View Object tab → select Lead.

Lead custom field for relationship → convert.

Map lead field.

Then we have to select lead conversion object which ever we are doing, i.e. Account

between contact & lead → select both field on lead

other object

Save it.

⑦

Can we map formula fields in custom field Map



No, you can't map formula fields in custom field mapping.

Reason: Because formula fields are not supported in proto buffer.

It's better to use object type or list type instead of formula fields.

⑧

What will happen to lead if it gets converted?



Then the records in leads are converted into Account, Contact if opportunity object if lead object become empty.

⑨

Can we map standard field with custom field?



No, we can't map standard field to custom field.

Reason: Because of update rule.

⑩

What are the lead statuses?



There are 4 lead statuses.

① Open - Not contacted.

② Working - Contacted.

③ Closed - Not converted.

④ Closed - Not converted.

List View



① What is List view?



List View - List View allow you to see filtered list of records, such as Contact, accounts or custom objects.

- This type extends to the metadata type, metadata of inheritance (e.g. fullname field).

② Where we can see List view?



In classic right sidebar there is App launch menu dropdown, if select the sales app & select New, then we will see name of the list channel.

③ Can we modify standard List view?



You can clone the standard List view but not able to modify standard List view.

④ Can we delete standard List view?



Yes, we can delete List view.

① Select List View

↳ ② Clicker to access List view contact.

↳ Select Delete.

⑤ Can we create New List Views.

→ Yes we can create new List Views.

- By going to create New View at top of any List page or in the view section of any Tab Name page.

⑥ Can we delete recently viewed List Views.

→ No, we can't delete recently viewed List Views.

No, we can't delete recently viewed List Views from Day 39, previous lesson today.

⑦ How many columns we can add in the List View?

→ We can add up to 15 columns in List View.

no problem of how many fields are there.

⑧ Which option we can see in the List View visibility.

→ Opportunity record type & equals operator.

(1) All custom views. (2) Recently

⑨ How to set visibility of List Views

→ As Salesforce Admin or User with Manage Public List View permission you can hide the List View so only you can see it.

⑩ If we want that only we can see the created list view then what should we do?



Then make list view visible only to your self.



How to create list view?



① Click on Create New View.

② Enter the view Name.

③ Enter the New Name.

④ Specify your filter criteria, if you want more filter fields click add filter logic.

then you can have up to

10 fields in your filter criteria.

⑤ Select the field you want to display on

Save.

Workflow Rule

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① What's the difference between Validation & Workflow rule?

→ A validation rule is no better than a simple formula / expression which will return true/false value for formatting the fields/records as per business requirements.

Workflow rule is used to save time & make process faster based on certain criterion.

→ Workflow rule is an automation tool to save time & make process faster based on certain criterion.

② What are the entry criteria of a workflow rule?

→ It is a condition which must be met for the rule to fire.

① Created.

② Created & Every time it's edited.

③ Created & Every time it's modified to meet subsequent

for reference. (It's not receiving notifications)

For how to edit right now if it's

the notifications sent by the workflow

④ What happens when we select created as an entry criteria?

→ Workflow rule will get fired only after record

is created. (But whatever record we have to meet the condition of entry criteria.)

Then only gets workflow rule or field.



④ What will happen when we select created of time & tr edited on a entry containing ?

→ In this case workflow rule (WFR) will not be fired because whenever we edit the record, or update the record then also WFR gets fired.

② But we are not able to do Time Trigger A for all records created for every time after edited on entry containing value of start and end of calendar no break ratio more than 10 minutes.

⑤ What will happen if we select created of every time & tr edited to meet subsequent criteria?

→ In this case WFR will check the condition for if condition are getting satisfied then work rule gets fired.

② But at the time of updating it will check whether previous time WFR was fired or not if it was fired then this time it will not allow it to fire through the condition are getting satisfied.

So this plan will fail this is start condition of it is used in basic workflow (if). because if it is not true then plan fails.

⑥ What is difference between created, if Every time it's
edited & created, , if Every time it's edited to meet
subsequent criteria.



⑦ Suppose we have an workflow rule which has created
if every time it's edited to meet subsequent criteria
if it has condition that if country is India or USA
if salary pr < 10,000 the update position as engineer.



i) We have created a record having country ==
India & salary = 11000, then it will update position
as engineer. → There will be used in immediate action of
action or field update.

ii) Then we updated record and made country as USA then
would system update position?

→ No because criteria are not met.

⑧ What is the use of re-evaluate workflow checkbox while adding field update rule?



When we check this checkbox it will allow dependent workflow rule to get fire.

⑨ What are the 4 actions we can perform using Workflow rule?



① Task.

② Email Alert.

③ Field updates.

④ Outbound message.

⑩ Can we delete records using workflow rule?



No, we can't delete records using workflow rule.

⑪ Can we fire an error message through WFR?



No, we can't fire an error message through WFR.

Ques 13 Can we create a validation in which we have to update child record from parent field.

→ Inheritance motto New to update child record with parent address at the top of the file.

Ans 13 We can't do this because we can't add validation to child record.

Ques 13 Can we add time trigger action to WFR when WFR is active ?.

→ No, we can't add time trigger action to WFR when WFR is active.

Ans 13 Therefore we can't see time triggered activity.

→

Ques 14 Can we define time trigger to child record.

Ans 14 No, we can't do this.

- (15) Can we delete active WFR & If Yes
→ No,
Reason: notifications will not be released if WFR is active.
- (16) Is it required notifications after applying immediate action when WFR is active?
→ Yes,
- (17) Can we delete any action like field update, When WFR is active?
→ Yes,
Reason: notifications will be released.
- (18) If we created WFR & that is not active yet then will it work?
→ No, when we create report script file will not work.

No, it will not work. If we created WFR but script is not active yet, so, obj

19

Does WFR bypass the validation rules?



Yes,

When WFR executes, then bypass the validation rules.

20

Why validation bypass WFR?



Why

21

How to create Email template?

Setup → Administer → Create Email Template.

↳ Administrator

↳ Create Email Template.

↳ New Template.

↳ Text, HTML, custom, Visualforce.

22

Can we apply time trigger action in minute, second?

→ All the balances are 49. Draw for 11th 49, oh

No, we can only apply Days left Hours in the trigger action.



Q3 If we have SIFR which will fire Email after one hr if after 5 min, we have changed value in record, then all records having that time trigger will fire or gets update of action to delete from time trigger queue?
→ (means after 2 hrs total minutes) follow-back of

Ans ① Not, we can't fire Email

Answer 3/4

Q4 Because time trigger we will not work in created & every time it's edited an entry criteria.

Ans ② All time triggers work again (as we can see in screenshot)

Q5 How to delete time trigger actions?

→ Step 1: Detach workflow rule.

② Clear all existing time dependent actions from

Click your Name | Setup | Monitoring | Time Based Workflow

③ Then go to workflow if time dependent action then you will see "edit button".

Setup

↳ Time-based workflow → actions list, or

• Select the action of delete.

(25) What is outbound message?

→ Outbound message is a message sent from SAP to external systems. It contains more kinds of actions in sales that send the information to end-point (external system). It can be in various formats like XML, CSV, JSON, etc.

(26)

Can we change entry content when WFR is created?

→ Yes.

Setup

↳ Create report smit of work

↳ Workflow Rule

↳ Select Workflow rule & click on it.

(27)

How many WFR can create per object?

so 50 WFR can create per object.

(28)

How many WFR active we can have per object?

→

so, WFR active per object = 50

stated in notes by teacher

① Can we update master object'sable workflow rule.

→ If it's possible but object must have master detail relate
to master.

In lookup if it's not possible.



② How many time based action we can create per object ?.

→ 50.

beforeinsert or after insert → record trigger

beforeupdate or after update

beforedelete or after delete

definition of record trigger -

for which entry criteria we can not create time
triggered action why ?.

modified batch

→

for created & every time it is edited entry criteria we
can not create time triggered action. Why ?.

Because.

batch create grant rule yes ①

batch update grant rule yes ②

③ Limitations of Workflow rule ?.

→

① WFR takes more computing capacity of the server.

② 10 email alert, 10 task, 10 field update.

③ Active session per object 50.

④ Time based trigger per WFR is 10 seconds.

⑤ WFR time trigger per hr is - 1000.

⑥ Number of action per IP 10 → batch trigger limit.

⑦ Maximum number of triggers 1000.

⑧ batch query problem.



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Approval process.

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- ① Define Approval process based on your craft.

→ Approval process → It is an automated process that approves records in salesforce.

- Approval process is nothing but staff steps for user granting permission when giving work will fullfill for match desired conditions.

- ② What are the two ways of creating approval process?

→ ① By Using Jump start Wizard.

② By Using Standard Setup Wizard.

- ③ What are the differences between jump start wizard & standard setup wizard?

→ Jump start wizard → ① It allows simple approval steps. (useful for simple approval)

② All steps are included. ③ It is useful for complex approval steps at process quickly by allowing Salesforce to default for you.

Standard approval wizard → ① It is useful for complex approval steps.

② All steps are included. ③ It is useful for defining your process for another setup wizard that allows you to define each step in process.



Q) What's the difference between entry criteria & criteria which we define in the steps?

→ Entry Criteria → ① Entry criteria branch to define rule for records that should enter in journey.
e.g. - Let's take example, you can define that only Account with name equal to project should enter in all related steps in journey.

Criteria → ① Control which records are part of the approval of the steps done by setting the step's criteria.

Q) What's the difference between Name & unique Name?

Name → It's used for a UI presentation that means they tend to never be placed on screen, before placing them editable for user.

Unique Name → It's used as API Name that allows integration with other external systems.

- It's not editable for user.

⑥ What options we have in Select approval section while creating approval process?

→ ① Jump start wizard, option we have to select in the approval section while creating approval process.

Jump start wizard may be selected if the user wants to skip the approval steps for a record.

→ ② Use default processing of previous step: If the user wants to skip the approval steps for a record, he can select this option.

→ ③ Can we add new approval step after activity in approval process?

→ No, we cannot add new step after activity in the approval process. But we can edit the step.

⑧ What are the submission actions, if any?

→ Initial Submission Action & Intermediate Submission actions. These occur when a user submits a record for approval.

Initial Submission Action: It is used to submit a record for approval. It is not forgotten when a user submits a record for approval.

Q Which action we can add in front of Submission Action

→ ① Task.

② Email Alert at step and we can note or

③ field update.

④ Outbound Message.

↳ Can we add new action while approval process is active?

→ ① Can we add new action while approval process is active?

① No, we can't add new action while approval process is active.

② we can only edit steps, i.e. (Logic change) & if we can remove step.

→ ④ Can we add initial submission action when approval process is deactivated?

→ Yes, we can add initial submission action when approval process is deactivated.

→ ⑫ Can we remove action of initial submission action when approval process is active?

→ Yes, we can remove action of initial submission action when approval process is active.

Q3. How many approval steps we can add in Approval process?

→

30 Step, we can add in approval process.

stopper lift (i)

Opposite words

14 Can we edit the approval step when approve process is active?

→ If we want to change the approval step or add new steps, we can do so by editing the process flowchart. Once the changes are made, we can save the process and activate it.

proceeds to derive.

④ Can we delete approval step when a approval
processing (active) step who add new
→ rule can remove it

⑯ When we can see the next step when adding approval step entering.

→ Then we can see sign approves fields.

Select approver for this step.

Next step arranges tasks to the user

(14) What's Pending Approval Actions? (all 49 marks) (10)

→ Definition of pending approval → It's the action that occurs when a record is saved but hasn't gone through the approval steps.

(15) Which action we can use in final Approval Action? (8)

→ includes no fields or new list of pending actions

- ① Task
- ② Email Alert
- ③ Field Updates
- ④ Outbound message.

(16) What's Pending Rejection Actions? (all 49 marks) (8)

→ final rejection action → It's the action that occurs when an approver rejects the request if it moves to the pending rejection state.

(17) What's Recall? (all 49 marks) (8)

Recall → It occurs when a submitted approval request is recalled by default the record is unlocked.

(21) What is the Approved status of another record when record is submitted for approval & not yet approved? → Not A Record
 → If there is no record → Pending. Status will show.

(22) Now what will happen if record is not matching the criteria of staff user or clicking on submit for Approval button.

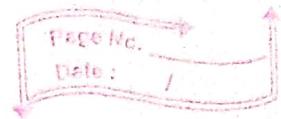
→ Then it will show an error message like Record not found.

(23) Why we lock the record when record is submitted for approval?
→ Because no one can do any changes in the record now.

(24) Importance of Approval process:

- ① It is used to automate how records are approved
- ② It is used to perform action, rejected, Approved, recalled, etc submitted for approval
- ③ It is used to change the status of job task on final

Validation Rule.



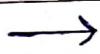
①

What is meant by Validation Rule?

Validation Rule is Validation Rule in Salesforce. Verify that the data entered in a user have to meet some certain criteria before the user can save the record.

②

Can we make any field required using Validation Rule?



Yes, we can make field required using Validation Rule. For that we have to use ISBLANK function. If it is needed.

e.g. ISBLANK(fieldname-c).

③

When validation Rule fires?



Validation Rule fires only when validation rule fires, means condition is true then only it fires otherwise it will save records.



④ Can we make any field read only using validation rule?

→ Yes, we can make any field read only using validation rule.

formula = OR (

AND (ISNEW(),

Active == C = True),

ISNOTNULL (C) AND (NOT (ISNEW())), if field

ISCHANGED (Active == C).

)

⑤ Can we delete any record using validation rule?

→ No, we can't delete any record using validation rule.

⑥ Difference between ISNULL() & ISBLANK()

→ Difference is as follows

ISNULL() → ① It supports to number fields or Boolean
value.
only.

(String, short, int) Java API

ISBLANK() → ① It supports to text fields & Number fields.

Q) What is the use of ISNEW() function? (A)

→ It checks if the record has been inserted or not.

Ans = If true

ISNEW()

IF TRUE = 1 - ELSE = 0

Q) What is the use of ISCHANGED() function?

→ It checks if the record has been changed or not.

Ans = If true then all fields are modified else not.

Q) What is the use of ISPICKVAL function?

→ ISPICKVAL is used for creating a validation rule.
It checks whether a selected picklist value is valid or not.

Syntax ISPICKVAL (fieldname, 'value')

→ It returns 1 if true else 0.

(12) How to make any picklist required? (71)

→ # By Using ISBLANK we can make any multi picklist required.

Object # By Using ISPICKVAL we can make

↳ validation rule

↳ formula (ISBLANK(Field Name, 'picklist value'))

valorego 40 if ch1 converted se mossa in forth
. algoritmo sharding d'les

Syntax ISBLANK (Field Name, 'picklist value')

REPORT if not blank (ID != QNA) AND ID == QNA (1)

def how start condition who not

(13) Implement a validation rule on which if picklist field country
is India then user can enter in currency

→ error message for Invalid input

formula goes same as we want

AND (

"REPORT if not blank (ISPICKVAL (Country -- c, 'India')),

not 'REPORT if not blank (ISBLANK (Currency -- c))'

and how else I will do it plus

(14) Implement a Validation Rule that if account have 'opportunity create permission' checkbox Pr True, then only user can create an opportunity, otherwise user should get an error "you don't have permission" to create an opportunity.

→ create (1) first create checkbox field of opportunity create permission

(2) create a formula on opportunity object account object.

Account.Opportunity = create permission -- c = false.

(ii) Not (Account.Opportunity = create permission -- c = true)

15)

Where we can see message in validation rule?

→ In after filling the value we can see error message
error location (I) row & (II) field.

16)

What is the difference between AND & OR operator with practical example.

① AND → In "AND" if all condition is "True"
Then only validation rule will fire.

Then if any one of condition is "False"
Then it will not show any "error"
then we can save record.

② OR → In "OR" if any one of condition is "True"
If any one of condition is "True" then
only validation rule will fire.

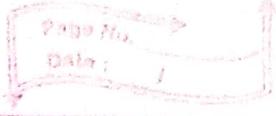
(P)

If both the condition failed then it will

show error message even if one condition is failed.

Ex: AND no first name & Gender, plz enter
condition. It shows no other condition by
T → True, Error. If add both condition T → Error,
T if → Save record. No plz enter if → Error,
f. if → Save record. f, f → Error.
f f → Save record. f, f → Save record.





Q17 How to make multiselect picklist required. Q18

→ Object

↳ Validation rule.

↳ formula: ISBLANK(field)

↓ save if you status is not

e.g. ISBLANK(Taluka--c),

, ok

No where clause will allow field from sub FF

Q18 Can we refer parent field values while creating validation rule. Child field value of parent

↳ formula of parent with child (Parent) TON

Q19 Can we use child field value while creating a validation on parent? (DNA reference)

→ e (Parent) TON

(2 - No rows) MAX(1)

Q20 Can we delete any field on which validation is active?

→ No. If so no show may not work

↳ Instead add blank block parameter

Q21 What is the use of active checkbox in validation rule?

→

The Active checkbox is depicted a validation rule is working.

Q23) Can we create validation on standard objects?



Yes.

Ans:-

Ans: Notable

(�) Smart plmrot

Q24) Can we update any field value using validation rule?



No.

(�) Smart

Q25) If we want that validation rule only work on existing record not on new created record then how to achieve it? (Practically)



NOT (ISNEW()) used this function to achieve it

Object

Validation rule

(23) Can we delete any validation rule directly?



Yes,

(24) Can we create records by using validation rule?

→ No.

(25) If we have validation rule which is present on object A & we want that we have to show error on object B then can we achieve it?

→ No.

(26) How many validation we can create per object?

→

100