

Admin Interview QuestionDate _____
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Q-1) What is Salesforce?

(a) Salesforce is a company, which provides cloud computing services and CRM (Customer Relationship Services) to users.

(b) Salesforce provides CRM platforms which is customizable with cloud service like marketing cloud, sales cloud and service cloud.

(c) Salesforce is the world's most popular CRM system.

(d) Many companies and customers rely on this dynamic, web-based, low-cost CRM platform.

(e) It was founded in March 1999 by former Oracle executive Marc Benioff.

(f) Salesforce CRM provides a complete feature-rich solutions for marketing, sales, service, health, non-profit, education, partner & community management etc.

Q-2) What is CRM? How it works in Salesforce?

→ (a) CRM stands for Customer Relationship Management.

(b) It is a software that stores customer information like contact, add, phone no.

(c) It also tracks customer activity like website visit, call, emails, and trying to communicate with customer or follow up customers.

(d) Work of CRM is to generate account, lead, contact, and opportunity for potential customers.

Q-1) what is profiles & permission sets in Salesforce
 → profiles → define base-level permission for users, including access to objects, fields and tabs.

permission sets → are used to extend permission to specific users without changing their profile.

Q-2) what are Organization-wide Defaults (OWD)
 → own setting control the default level of access users have to each other's data.
 it can be private, public read only or public read / write.

Q-3) what are the different type of automation tools in Salesforce?

① Workflow Rules → simple automation for field update, email alerts, and tasks.

② Process Builders → advanced automation for complex business process

③ Flows → automates user interaction with screen based flows

④ Approval Process → manages multi-step approvals, tracking and managing responses.

Q-4) what is Data Loader in Salesforce?
 → Data Loader is a tool used to import, update, export and delete large volumes of data in Salesforce using CSV files.

② it also provide deal tracking.

Example: i) Airtel - marketing plan - Stages & follow-ups
ii) Account Generate - Service +

CRM stands for Customer Relationship Management. Broadly defined, CRM is a strategy for managing a company's interaction with its clients and prospects and ensuring that this interaction is thorough out the duration.

Appling from 2018 to 2020

Q-3) what are Edition in Salesforce

Ans: ① Personal Edition (Windows, Mac)

② Group Edition (Linux, Mac)

③ Professional Edition (Windows, Mac)

④ Enterprise Edition (Windows, Mac)

⑤ Performance Edition (Windows, Mac)

⑥ Unlimited Edition (Linux, Mac)

⑦ Developer Edition (Windows, Mac)

⑧ Contact Manager Edition (Windows, Mac)

Q-4) What are licenses in Salesforce?

Ans: ① Salesforce license (Basic, Pro, Premium)

② Salesforce platform license (Basic, Pro, Premium)

③ Chatter Force / Chatter Only license (Basic, Pro, Premium)

④ Service Cloud license (Basic, Pro, Premium)

⑤ Marketing Cloud license (Basic, Pro, Premium)

⑥ Partners, or Community license (Basic, Pro, Premium)

⑦ Social license (Basic, Pro, Premium)

⑧ Premium license (Basic, Pro, Premium)

⑨ Professional license (Basic, Pro, Premium)

Q-5) What is an object? Give example.

object → it is a collection of records & fields.

Ans:

- ① Every database has tables to store data.
- ② So, in Salesforce object means tables.
- ③ Tables are collection of columns and rows.
- ④ These columns have related fields.
- ⑤ (fields for collecting data) (like date, name, address etc.)
- ⑥ Row are collected as Records.
- ⑦ (records for collecting information)
- Ex. User information, name, DOB etc.

object → An object is similar to a database table in Salesforce where you can store information.

object can be:

Label	Account	Standard	Custom
plural Label	Accounts		Student
API Name	Account		Student_c

Types of objects:

- ① Standard Objects
- ② Custom Objects
- ③ External Objects

(i) (1) Standard object → id provided by the salesforce. (e.g. Account, Contact, Opportunity.)

(2) standard object are created by salesforce.

(3) custom standard object does not contain field name. e.g. in its API Name is not.

(4) standard object have some standard fields.

(5) we can't delete standard object.

(6) we cannot do configuration changes in standard objects.

(7) we can't delete field from standard object.

(8) we can't create new standard object.

(9) we can create change standard object.

(ii) custom object → created by the user as per business requirement.

(1) custom object are which organization create as per business required.

(2) custom objects have '---' in API name.

(3) custom object have id & standard field only i.e. Owner, created by, modified by & Name.

(4) we can delete custom object.

(5) we can do configuration changes in custom object.

(6) we can delete field on custom object.

(7) we can create many custom objects.

(8) we can change names of custom objects.

Q-6) what is Application ?

Application is a collection of object on tabs.

Q-7) what is Tab ?

Tab is a collection of user interface.

Q-8) How many types of portals are available in salesforce?

① Self-service portal

② Customer portal

③ Partner portal

Q-9) what is Field ?

① A field is like a database column.

② There are various data types are available in salesforce to create fields.

③ By entering values in fields, we create a record in salesforce.

④ Field can be standard as well as custom. There are two types of fields?

A) Standard Fields → Predefined fields
e.g. Name, ID, Created Date

B) Custom Fields → Added by users for specific business needs.

Q-10) what is Tab ?

① Tab is a collection of user interface

② clicking on Tab we can navigate around an application.

(iii) Every tab serves as the starting point for viewing, editing and entering information for a specific object.

(iv) When we click a tab, the corresponding home page for that object appears.

(v) For example → if we click the Account tab, the Account tab home page appears. It gives you access to all of the account records. We can view details of a particular record by clicking on it.

Q-11) What is Lead & Contact
→ Leads means potential customer.

Q-12) What is Autonumber & what is Autonumber
→ Autonumber is a unique identification code.

Q-13) What is Application & what is Application
→ Application is a collection of objects.

① An application contains for all the objects in tabs and other functionality.

② It is similar to any programming project where we keep all our code files.

③ In Salesforce app consists simply of a name, a logo and an ordered set of tabs.

Q-14) What is Record?

① Records are the most (entities) in objects which are uniquely identified by their id.



- ③ We can create records by entering values in fields available in an object.
- ③ We can create, edit, view and delete a record in Salesforce.

(Q.15) Standard Navigation and Console Navigation
→ Standard Navigation opens one record at a time, on the page whereas in Console Navigation it only opens more than one records so they are opened in sub tabs together.

- (Q.16) Name Datatypes to create fields?
- ① Autonumber
 - ② Formula
 - ③ Rollup Summary
 - ④ Lookup Relationship
 - ⑤ Master-Detail Relationship
 - ⑥ External lookup Relationship
 - ⑦ checkbox
 - ⑧ Currency
 - ⑨ Date
 - ⑩ Date/Time
 - ⑪ Email
 - ⑫ Geolocation
 - ⑬ Number
 - ⑭ Percent
 - ⑮ Phone
 - ⑯ Picklist
 - ⑰ Picklist (Multi-select)
 - ⑲ Text
 - ⑳ Text Area
 - ㉑ Text Area (Rich)
 - ㉒ Text (Encrypted)
 - ㉓ Time
 - ㉔ URL

(Q-17) what is a lookup relationship & its merits -

Masters & Details Relationship

Lookup Relationship

- | | |
|--|---|
| ① Cascading deletion supported | ① Cascading deletion not supported |
| ② If you delete Parent Record
→ child record is also get deleted. | ② If you delete parent record (child record doesn't get deleted.) |
| ③ Strongly Coupled Relationship | ③ Loosely Coupled Relationship |
| ④ Required field | ④ Optional field |
| ⑤ We can't create Roll-up Summary field | ⑤ We can't create Roll-up Summary field |
| ⑥ Owner of parent & child is same. | ⑥ Owner of child & parent could be different. |
| ⑦ We can't create MD on standard object. | ⑦ We can create lookup of any object whether it's Standard or custom. |
| ⑧ Can Create maximum 2 MD relationship field | ⑧ Can Create upto 40 lookup relationships |

Q-18)

What is lookup relationship?

- (1) Loosely coupled relationship.
- (2) Records exist independently.
- (3) loose association.
- (4) if you delete a parent record, child record doesn't get deleted.
- (5) optional field.
- (6) we can't create roll up summary field.
- (7) owner of child & parent could be different.
- (8) we can create lookup of any object whether it is standard or custom.
- (9) using Concept.Create upto 50 lookup relationship

Q-19)

What is master detail relationship?

- (1) strongly coupled relationship.
- (2) if you delete a parent record child record is also get deleted.
- (3) Strong association.
- (4) child records are dependent on the parent records.
- (5) Required field.
- (6) we can create roll up summary field.
- (7) owner of parent & child is same.
- (8) we can't create more than standard object.
- (9) can create maximum 2 MD relationship field.