

Report & Dashboard Interview

O.A
03

O-75)

View All & modify All 2.9 points (85-0)

① Grant access to all records of the object regardless of the sharing & security settings.

② View all and modify all permissions ignore the sharing model, disregard sharing rules.

O-A-3

Report & Dashboards Topic

O-76) what tools Data Analysis tools available in

Salesforce

→ Reports, Dashboards, Analytics, etc.

Dashboards

O-77)

Q) What is Report?

① Report is a list of records related to objects that meet the criteria defined.

② One can filter, group and do maths on reports.

③ One can display reports graphically through charts.

④ Every report is stored in a folder.

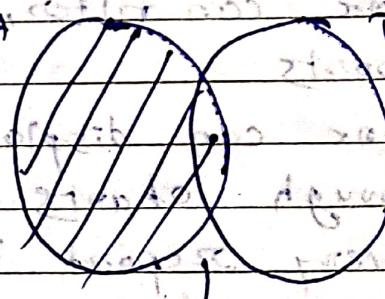
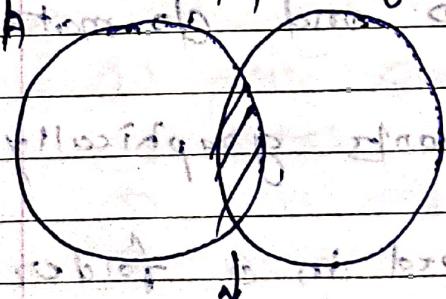
⑤ Report folders determines how one can access reports to view, Edit or Manage.

⑥ Report folders can be public, hidden or shared.

- Q-78) what is Report type ?
- ① A Report type is like a template for reports.
 - ② Report type determines which fields and records are available for user when one is creating a report.
 - ③ This is based on relationships between primary object and its related objects.
 - ④ For example, with Account with Contact report type, Account is primary object and contact is related object.
 - ⑤ Reports display those records that meet the criteria defined in report types.

- Q-79) what is Report Type ?

→ ① primary object with related object
② primary object with or without related object



A	B

A	B

Q. 50) what are the different types of reports?

- ① Tabular Report → Simple list of reports
(no grouping)
- ② Summary Report → Grouping with Subtotals
- ③ Matrix Reports → Grouping by Rows & Columns
- ④ Joined Reports → multiple related report designs in one view.
- ⑤ Tabular Report → Make a list
- ⑥ Summary Report → Group by Rows
- ⑦ Matrix Report → Group by Rows & Columns
- ⑧ Joined Report → More than one report together

Q. 51) what is Tabular Reports?

→ Simple list of reports, to columns

make a list

- ① Tabular report is the simplest report format
- ② Rows display records and columns display fields
- ③ Filters can be applied.
- ④ Sorting can be applied.
- ⑤ Chart is not supported in this types of reports.

Q-82) what is Summary Report ?

→ Group by Rows

Grouping with Subtotals

i) This report allows the user to group records based on rows.

ii) we can summarize the report based on particular fields.

iii) This report supports chart.

iv) Filters and sorting can be applied.

v) it displays subtotals as well for numeric fields.

Q-83) what is Matrix Report ?

→ Group by rows & columns.

i) This report summarizes the records based on rows and columns.

ii) It basically creates a grid and shows number of records based on grouping of rows and columns.

iii) This report also supports charts.

Q-84) what is Joined Reports ?

→ i) multiple related reports in one view.

ii) Merges many one reports together.

iii) In this type user can create multiple blocks of reports showing different types of reports.

iv) Each block is defined as a sub-report and can have different report type.

v) Each block has its own fields, filter criteria, charts etc.

Q-85) Filters in reports

① Standard Filters →

Show matching Created Date

② Field Filter →

Specify to fields

③ Filter Logic →

Boolean conditions to control Field filters

④ Cross Filter →

Filter a report by child object using with or without conditions.

Q-86) Charts (can be added in which type of Summary Report)

Matrix Report

Joined Report

Q-87) Types of charts available in Reports?

- ① Bar
- ② Column
- ③ Stacked Bar
- ④ Stacked Column
- ⑤ Line
- ⑥ Donut
- ⑦ Funnel
- ⑧ Scatter plot

Q-88) What are Buckets in Reporting?

Buckets allow users to group values without creating a new field.

Q-89) What is Bucket Field in Report?

- ① Bucket field is created in report itself.
- ② This field is used to group values of particular field available on the object.
- ③ It supports fields of type Picklist, Number, Text.

Q-88) About Reports Folder :-?

→ ① Reports folders determines how one can access reports to view, edit, or manage.

② Reports folders can be public, hidden or shared.

③ We can control access of contents of the folder based on Roles, permission, public groups, territories and license type.

Q-89) Can we share a report with User or Group?
→ Yes, we can share report folder.
→ We cannot share individual reports.

Q-90) Access Levels while sharing Reports Folder

→ View
Edit

Manage

→ Home page
App page in Home tab
Recent page

① Home page
② App page in Home tab
③ Recent page

② Report should not be in private folder.

Q-91) What are Reports & Dashboards in SalesForce?

Reports → Show data in tables, summary, matrix or filtered formats.

Dashboards → provide visual representations of reports.

- Q. 0.03) What is Dashboard?
- Q. Provide visual representation of Reports.
- ① A dashboard is a visual display of key metrics and trends for Records in your org.
- ② Source of dashboard is Reports.
- ③ You can place one Report in multiple dashboards.
- ④ Having multiple reports on a single dashboard page makes it a powerful visual display tool.

- Q. 0.04) Can we place a Dashboard on lightning page?
- Yes, we can place dashboard on below lightning pages:
- ① Home page
 - ② App page
 - ③ Record page
 - ④ Dashboard

Q. 0.05) Can we apply filter in Dashboard?

- Yes, we can apply filter in dashboard.

Q. 0.06) About Dashboard & Folder:

- ① Dashboard folder Controls who has access to its content.
- ② If one has access to folder then only one can access its dashboard.
- ③ However, to view the dashboard components one need access to underlying Reports as well.

Q.97) Can we share a dashboard with User group or Group?

→ Yes, we can share dashboard folder.
→ We cannot share individual dashboard.

Q.98) Access Levels while sharing Dashboard

→ Folders → View → Share → Add → Add → Edit → Share → Add → Private
→ Pending → Pending → Add → Add

Q.99) Important About Dashboard ?

① Each Dashboard has 9 running users
② Running users Security determine what data to display in dashboard.

③ If the running user is a specific user then all dashboard viewer sees data based on the security setting of that user regardless of their own security settings.

④ Dynamic Dashboards are those for which running user is always logged in user. Here each user views the dashboard based on their own security setting.



Lighting Flow Topic Internices Q&A

100) what is process Automation's a process Automation provides declarative tools to do automation in Salesforce.

① workflow rule

② process builder

③ Flows

④ Approval Process

101) what is Flow Builder?

① provides declarative process Automation.

② Lightning flow provides this point and click automation tool like Flow Builders.

③ Lightning Flow is the name of product.

④ process Builders and Flow Builders are name of the tools.

① Use process Builders to create processes.

② Use Flow Builders to create Flows.

102) Type of Flows

① Screen Flow

② Record - Triggered Flow

③ Schedule - Triggered Flow

④ Platform Event - Triggered Flow

⑤ Auto Launched Flow.

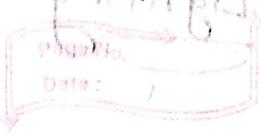
103) Flow Elements

① Screen ② Action ③ Subflow ④ Assignment

⑤ Decision ⑥ Loop ⑦ Collection Sort ⑧ Collection Filter

⑨ Create Record ⑩ Get Record ⑪ Update Record

⑫ Delete Record ⑬ Roll Back Records.



104) Flowchart Resources in heroku

- (1) Variables (2) constant (3) Formulas
- (4) Text Template (5) choice (6) collection - choice set (7) Record choice set
- (8) picklist choice set (9) stage

105) Screen Flow

- (1) it guides user through a business process.
- (2) It can be triggered/launched through:
 - (1) Lightning page
 - (2) Experience cloud sites
 - (3) Quick Actions
 - (4) and more

106) Record - Triggered flows

- (1) Launches when a record is
 - (1) Created
 - (2) Updated
 - (3) Deleted

(4) This auto launched flow runs in the background.

107) Scheduled - Triggered flows

- (1) Launches at a specific time & frequency for each record in a batch.
- (2) This auto launched flow also runs in the background.

(3) scheduled (4) background (5) good (6) continue (7) recurring schedule (8) created (9) record found (10) current time (11) last (12) from start (13) from end

108) Platform Event - Triggered Flow ?

→ ① Launched when a platform event message is received.

→ ② This auto/launched flow also runs in the background.

109) Auto-launched Flow ?

→ ① It is invoked by

→ ② Apex code with a flow or web

→ ③ processes

→ ④ REST API with apex

→ ⑤ and more

→ ⑥ This auto/launched flow also runs in the background.

110) what to Debug a Flow ?

→ ① Helps to test the flow execution before activating it.

→ ② it shows step-by-step results and shows errors (if any).

111) Version Control ?

→ ① Each time you update something in flow a new version is created.

→ ② After creating new version we need to activate the flow to run.

112) Can we use Lightning Component in Screen Flow?

→ Yes

113) Can we call Apex class through flow ?

114) which annotation we use with apex class method when we call apex class through flow ?

Invocable Method

115) How to call a flow into another flow

(A) Sub Flow Element

(i) Screen Flow can call another screen flow as sub flow

(ii) Record triggered Flow can only call another auto/launched flow as sub flow.

116) Some Important Action that can be done through flow ?

(i) post to chatter

(ii) Send Email or Email alert

(iii) Send notification

(iv) Call sub flow

(v) call apex class

(vi) call Approval process

117) \$Record vs \$Record - prior

(1) Both are global variable available in flow

(2) \$Record is available when record is created, updated or deleted.

(iii) ~~Record~~: Prior is available only when record is updated.

(iv) ~~Records~~: provides the value of the records through which flow is triggered.

(v) ~~Record - Prior~~: provides old values of the record through which flow is triggered.

118 what happens when flow fails?

i) It gives an error message on the interface.

ii) Also throws an email to the user who last modified it.

119 Fast Field Update vs Action & Related

i) Fast Field Update: update fields on the record that triggers the flow to run. In this case, flow runs before the record is saved to the database.

ii) Actions & Related Records: Update any records and perform actions, like send an email. In this case, flow runs after the record is saved to the database.

120 Can records be shared with users through flows?

→ i) Yes
ii) For example, if you want to share account record so in flow you can create a record of Account Share object.

(P2)

Can we set the order of execution of triggered flows?

(P2)

What are two paths we have in Record Triggered Flows?

① Run Immediately

② Run Asynchronously

(P2)

From where we can validate whether Flow is scheduled or not?

Setup > Scheduled Jobs

(P2)

Can we change the flow's execution order? Yes, we need to enable this setting from process Automation Settings.

(P2)

What frequency will be set in Schedule for triggered flow? Once

Daily: Every 8 hours
with watermark enabled from 2 hours ago
until now 24 hours later no break

(P2)

Record single variable into Record Collection Variable

① Record single variable → can store information in form of a single Record about specific observation

→ This will be stored in a collection of all recorded flows, so stored and how much in no limit

(ii) Record Collection in Variable → can store information in form of multiple records about Specified objects.

(iii) Can we pause and resume a process flow?
→ (i) yes after configuration
→ (ii) you can't pause through button present on Screens.

(iv) Does your company requires through Setup > paused and failed Flow Interventions.

(v) Does flow supports binarizing?
→ (1) yes, when we update something in flow it always creates a new version.
(2) we can anytime activate or deactivate any flow as per requirement
(3) we can also deactivate existing version if they are not in use anymore.

(vi) Consider deactivate flow anytime?
→ Yes, we can deactivate flows only time if we don't want it to run. later we can activate as well any version that we want to run.

with consideration to right context need to do.

