Leads

① What is leads?

→

Leads :- Leads means someone who interested in your products or services, or also called potential customers.

- Converting leads to loyal customers will provide success with in business

② It is mandatory to convert leads to opportunity?

→ No, it's up to you.

③ What is lead field mapping?

→

Lead field Mapping :- means Leads are connect to the accounts, contact & opportunity object in help of map lead field called lead field mapping

④ What is custom field mapping?

→

Custom field Mapping :- Custom field Mapping means mapping of the custom field to lead fields.

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(5) Why do we do custom lead field mapping ?

→

- Because whenever you created any custom fields in accounts, contact & opportunity then it is mandatory/required to create same custom fields in lead objects also. otherwise. the data from the leads is not converted in account, contact & opportunity.

- And it is mandatory to do lead field mapping in each other.

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

→

first of all create custom fields in Account & try to remember datatype & length of datatypes

↳ Then create same type of custom fields in Leads.

↳ (try to ensure that datatype & length of datatype)

Then go to lead object.

↳ View object

↳ Lead custom field & Relationship. → convert.

↳ Map lead fields.

↳ Then we have to select lead conversion object whatever we are early. i.e. (Account & contact)

↳ select both field in lead & other object

↳ Save it.

⑦ Can we map formula fields in custom field Map

→ You can't map formula fields in custom fields mapping.

⑧ What will happen to lead if it gets converted?

→ Then the records in leads are converted into Account, contact & opportunity object & lead object become empty.

⑨ Can we map standard field?

→ No, we can't map standard field.

⑩ What are the lead statuses?

→ There are 4 leads statuses.

1. Open - Not contacted.
2. Working - contacted.
3. Closed - 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 inherits its fullname fields.

② Where we can see list view?

→

In classic right side corner there is App launch menu dropdown, & 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 click to access list view control.
↳ select Delete.

(5) Can we create New list view?

→ yes we can create new list view.

- 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 recentally viewed list view?

→ ~~No~~ ~~Yes~~, We can not delete recentally viewed list.

(7) How many coloumn we can add in the list view?

→ We can add upto 15 coloumn in list view.

(8) Which option we can see in the list view visibility filter?

→ ~~Opportunity record type & equals operator.~~
(1) All custom views. (2) Recently

(9) How to set visibility of list view?

→ 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 salesforce users, select visible to certain group of users.

(11) How to create list view?

→

1. Click on create New View;
2. Enter the view Name.
3. Enter the unic New Name.
4. Specify your filter criteria, If you want more filter fields click add filter logic. Filter Row you can have up to 10 fields in your filter criteria.
5. Select the field you want to display on the list view.
6. Save.

Workflow Rule.

(1) What is difference between validation & Workflow rule?

→

Validation Rule — (i) Validation rule contains certain formula / Expression which will return true / false value for formatting the fields / records as per business requirements.

Workflow rule — (i) Workflow is an automation tool to save time & make process more faster based on certain criterion.

जर criteria match ~~hote~~ nhi zala तर Action perform नहीं होतं.
Workflow Rule मध्ये. जसं Validation मध्ये error show होते जर match zala नाही तर Record save होत नाही.

(2) What are the entry criteria of workflow rule?

→

1. Created.
2. Created & Every time it's edited.
3. Created & Every time it's edited to meet subsequent criteria.

(3) What happen when we select created as an entry criteria?

→

Workflow rule is will get fired only after record is created. (But whatever record we have has to meet the condition of entry criteria.) then only gets workflow rule is fired.

(4) What will happen when we select created & Every time it's edited on a entry criteria?

→

(1) Workflow Rule gets fired when record is created also the whenever we edit the record, or update the record then also WFR gets fired.

(2) But we are not able to do Time Trigger Action on created & every time it's edited on a entry criteria.

(5) What will happen if we select created & every time it's edited to meet subsequent criteria?

→

(1) In this case WFR will check the condition first & if conditions are getting satisfied then workflow rule gets fired.

(2) But at the time of updating it will also check wheather previous time WFR was fired or not. if it was fired then this time it will not allow it to fired through the conditions are getting satisfied.

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

→

⑦ Suppose we have an workflow rule which has created & every time its edited to meet subsequent criteria & it has condition that if country is India or USA & sallary is < 10.000 the update position as a engineer.

→

(i) We have created a record having having country == India & Sallary = 11000, then it will update position as Engineer. → This will be used in Immediate action & action is Field update.

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

→ No because criteria are not meet.

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

→ 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 Alerts.
3. Field updates.
4. Outbound messages.

(10) Can we delete records using workflow rule ?

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

(11) Can we fire fire an error message through WFR ?

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

(12) Can we create a validation in which we have to update child record from parent ?

→

(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.

(14) Where we can see time triggered activity ?

→

(15) Can We delete active WFR ?

→ No,

(16) Can we apply immediate action when WFR is active?

→ Yes,

(17) Can We delete any action like field update, When WFR is a active ?

→ Yes,

(18) If We created WFR & that is not active yet then will it Work ?

→ No, it will not work. If we created WFR but that is not active yet. So,

(19) Does WFR Bypass the validation rule?

→ Yes,
When WFR executes, then bypass the validation rules.

(20) Why validation Bypass WFR?

→

(21) How to create Email template?

→ Setup
↳ Administer
↳ classic Email template.
↳ New Template.
↳ Text, HTML, custom, Visualforce.

(22) Can we apply time trigger action in minutes, seconds

→

No, we can only apply Days & Hours in time trigger action.

(23) If we have WFR which will fire email after one hr & after 5 min, we have changed value in record, then will that time trigger will fire or gets delete from time trigger queue?
→

(i) No, we can't fire email

(ii) Because time trigger will not work in created & every time it's edited an entry criteria.

(24) How to delete time trigger action?
→
(1) Deactive workflow rule.
↳ (2) Clear all existing timedependent actions from here.
Click your Name | setup | Monitoring | Time Based Workflow.
↳ (3) Then go to workflow & time dependent action then you will see "edit button".

or
Setup
↳ Time-based Workflow
↳ Select the action & delete.

25 What is outbound Massage?

→ Outbound Massage! → Outbound massage is a kind of action in sales that sends the information to end-point (external System) in the form of file formate.

26 Can we change entry criteria when WFR is active

→ Yes.

Setup
↳ create
↳ Workflow Rule
↳ select Workflow rule & edit

27 How many WFR can create per object?

→ 500 WFR can create per object.

28 How many WFR active we can have per object

→ 50, WFR active per object.

① Can we update master object while workflow rule.
→ It is possible but object must have master detail relation is must
in lookup it is not possible

(29) How many time based action we can create per object ?
→ 50.

(30) for which entry criteria we can not create time triggered action ? why ?

→

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

Because.

(31) Limitations of Workflow rule ?
→

① WFR takes more computing capacity of the server

② 10 emails alerts, 10 tasks, 10 field update.

③ Active WFR per object 50.

④ Time based trigger per WFR is 10.

⑤ WFR time trigger per hr is - 1000.

Approval procerr.

(1) Define Approval procerr ?

→ **Approval procerr** :- It ir an automated procerr that approver recordr in salerforce.

- Approval procerr ir nothing but granting a permission when given task will fulfill, or match desired conditionr.

(2) What are the two wayr of creating approval procerr?

→ (i) By Using Jump start Wizard.

(ii) By using standard setup Wizard.

(3) What ir the difference between jump start Wizard & standard setup wizard ?

→ **Jump start Wizard** :- (i) It ir allowr single approval step. (usefull for single approval)

(ii) It ir usefull for create approval step at procerr quickly by allowing salerforce. & default

(iii) All step are not include.

Standard ~~approval~~ setup wizard :- (i) It ir usefull for complex approval procerr for you

(ii) It ir usefull for define your procerr & another setup wizard that allow you to define each step in procerr

(ii) All stepr are include.

④ What is difference between entry criteria & criteria which we define in the steps ?

→

Entry Criteria :- ① Entry criteria is used to define rule for records that should enter in journey.

e.g. - lets take example, you can define that only Account with name equal to prajawal should enter in journey.

Criteria :- ① control which records are part of the approval steps by setting the step's criteria

⑤ What is the difference between Name & unique Name ?

→ Name :- It is used for UI presentation that means they showed on screen.
- It is editable for user.

Unique Name :- It is used as API Name that allowing to integration with other external system.
- it is not editable for user.

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(6) What is options we have in select approval section while creating approval process?

→ (i) Jump start wizard option we have to sel[ect] in approval section while creating approval proce[ss]

(7) Can we add new approval steps after activity the approval process?

→ No, we cannot add new approval step after acti[vating] the approval process, But we can edit the steps

(8) What is initial submission Action?

→ Initial Submission Action? - Initial Submission action[s] that occur when a user first submits a record for approval.

9) Which action we can add in initial submission Action process?

→ 1) Tasks.
2) Email Alert
3) Field update.
4) Outbound Message.

10) 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 ~~कर सकता~~)
& we can remove steps.

11) 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.

(13) How many approval steps we can add in Approval process?

→ 30 steps. we can add in approval process.

(14) Can we edit the approval steps when approval process is active?

→ yes, we can edit approval steps when approval process is active.

(15) Can we delete approval steps when approval process is active?

→ We can remove it

(16) When we can see the next step when adding approval steps criteria.

→ Then we can see assign approval fields.

Select approver for this step.

Next step assign task to the users

(17) What is final Approval Action ?

→ **final Approval Action** :- It is the actions that occur when a record is approved from all the approval steps.

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

→
1. Task
2. Email Alert
3. field Update
4. outbound message.

(19) What is final Rejection Action ?

→ **final Rejection Action** :- It is the action that occurs when an approver rejects the request & it moves to the final rejection state.

(20) What is recall ?

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

21) What is the approval status of the record when record is submitted for approval & not yet approved ?

→ pending. status will shown.

22) What will happen if record is not matching the criteria & still user is clicking on submit for Approval button.

→ Then it will show an error

23) Why we lock the record when record is submitted for approval ?

→ Because No one can do any changes in the record.

24) Importance of Approval process ?

→ ① It is used to automate how records are approved in Salesforce.
② It is used to perform action, rejected, Approved, recalled, first submitted for approval
③ Increasing chance of getting of job done on time.

Validation Rule.

① What is mean by Validation Rule?

→

Validation Rule : Validation Rule in salesforce verify that the data entered by a user have to meets some certain criteria before the user can save the record.

② Can we make any field required using Validation Ru

→

Yes, we can make field required using validation rule. for that we have to use is ISBLANK function. if it is needed

e.g. ISBLANK(fieldname__c).

③ When validation Rule fires?

→

validation Rule fire only when validation rule ~~true~~, ~~means~~ condition is true then only it fire other wise 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),
AND (NOT (ISNEW ()),
ISCHANGED (Active__c).
)
)

(5) Can we delete any record using validation Rule?

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

(6) Difference betn ISNULL() & ISBLANK() ?

→ ISNULL() :- (i) It supports to number fields. or Boolean value. only.

ISBLANK() :- (i) It supports to text fields. & Number fields.

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9) What is the use of ISNEW() function?

→

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

→

11) What is the use of ISPICKVAL function?

→

ISPICKVAL is used for creating a validation rule that check whether a certain picklist value is selected

Syntax ISPICKVAL (fieldname, 'value')

(12) How to make any picklist required ?

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

By using ISPICKVAL we can make

Object

↳ Validation Rule

↳ formula (ISBLANK (FieldName , 'picklist value'))

↳ save.

Syntax ISBLANK (FieldName , 'picklist value')

(18) Implement a validation rule in which if picklist field country have India as a value then user can enter in currency ?

→ formula :

AND (

(ISPICKVAL (country__c , 'India')),

(ISBLANK (currency__c))

(14) Implement a validation Rule that if account have 'opportunity create permission' checkbox is True , then only user can create an opportunity , otherwise user should get an error " you Donot have permission" to create an opportunity.

→ (i) first create checkbox field of opportunity create permission on account object.

(ii) create a formula on opportunity object.

(i) Account.Opportunity_create_permission__c = false.

(ii) Not (Account.opportunity_create_permission__c = True)

(15) Where we can show error message in validation rule ?

→ error location (I) Top of page.
(II) field.

(16) What is difference between AND & OR operator with practicle example.

→

(1) AND :– (1) In 'AND' if all condition is "True" Then only validation Rule will fire.

(2) If any one of condition is "false" Then it will not show any 'error' then we can save record

(2) OR :– (i) In 'OR' if all condition is "True" or any one condition is 'True' then only validation rule will fire.

(ii) If Both the are "false" Then it will save record.

Ex:- AND condition

T	T	→ True. Error
T	f	→ save record
f	T	→ Save record.
f	f	→ Save record

Ex OR condition

T	T	→ Error
T	f	→ Error.
f	T	→ Error.
f	f	→ save record.

(17) How to make multiselect picklist required.?

→ object
↳ validation rule.
↳ formula ISBLANK(field)
↳ save

e.x. ISBLANK(Taluka__c).

(18) Can we refer parent field value while creating validation on child?

→

(19) Can we use child field value while creating a validation on parent?

→ No

(21) can we delete any field on which validation is active.?

→ No.

(22) What is the use of active checkbox in validation rule?

→ The Active checkbox is denoted a validation rule is working.

(23) Can we create validation on standard object?
→

Yes.

(24) Can we update any field value using validation rule
→

No.

(25) If we want that validation rule only work on existing record not on new created record then how to acheive it show. practically?
→

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

object
↳ Validation rule
  ↳ formula AND(
   NOT(ISNEW()),
   ISBLANK(currency__c)
)

it will show error on you work on existing record currency field should be blank.

(26) Can we delete any validation rule directly ?

→ Yes,

(27) can we create records by using validation rule ?

→ No.

(28) 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 acheive it ?

→ No.

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

→ 100