SALESFORCE BASICS

INTERVIEW QUESTIONS AND ANSWERS

1. What is Salesforce?

Salesforce is a cloud-based customer relationship management (CRM) platform that helps businesses manage their sales, marketing, and customer service activities. It provides a suite of tools and features that enable organizations to streamline their processes, automate tasks, and enhance collaboration among teams. The core functionality of Salesforce revolves around managing customer information and interactions. It allows businesses to store and track customer data, such as contact details, communication history, and purchase preferences, in a central database. This information can be accessed and updated by different departments within the organization, enabling a holistic view of each customer.

2. What is a Custom Object in Salesforce?

In Salesforce, a custom object refers to an object that you create to store data that is specific to your organization and unique to your business processes. Salesforce comes with standard objects, such as Accounts, Contacts, Opportunities, and Cases, which are designed to cater to common business needs. However, custom objects allow you to extend the functionality of Salesforce and tailor it to your organization's specific requirements.

3. What does a Custom Object permit the user to do?

A custom object in Salesforce permits users to:

- Store specific data tailored to their organization's needs.
- Create custom fields to capture various types of information.
- Design page layouts for a user-friendly interface.
- Establish relationships with other objects for data organization.
- Define validation rules to ensure data integrity.
- Set up automation with triggers and workflows.

4.   What is Self-Relationship in Salesforce?

In Salesforce, a self-relationship refers to creating a relationship between records of the same object. It means that each record in the object can be related to another record within the same object. Self-relationships are commonly used to represent hierarchical structures or to link records with other related records of the same object. To create a self-relationship, you need to define a custom lookup or master-detail relationship field within the object itself that references other records of the same object. This custom field allows you to associate a record with another record within the same object.

5.   What is the difference between Triggers and Workflow?

Triggers and workflows are both automation features in Salesforce, but they serve different purposes and have distinct functionalities:

- Triggers: Triggers are Apex code snippets that execute before or after specific database-related events (like insert, update, delete, etc.) occur on records in Salesforce.

- Purpose: Triggers allow developers to define custom business logic and perform complex actions when specific events happen on records, such as updating related records, enforcing data validation, or sending email notifications.

- Flexibility: Triggers offer high flexibility and customization capabilities since they are written in Apex, Salesforce's programming language, and can handle complex processes.

- Workflows: Workflows are declarative automation tools that let you define rules and actions to be performed when specific criteria are met on a record.

- Purpose: Workflows are primarily used for simple automation tasks and are more user-friendly than triggers. They allow you to set up automated actions like field updates, email alerts, task creation, or outbound message delivery based on certain conditions.

- Flexibility: While workflows provide automation without the need for coding, they have some limitations compared to triggers. They are ideal for straightforward actions but may not handle complex logic as effectively as triggers can.

6. What can cause data loss in Salesforce?

Data loss in Salesforce can occur due to accidental deletion, data import errors, programming mistakes, integration issues, system bugs, user errors during data migration, API or bulk data operations, and misconfigured data retention policies. To prevent data loss, implement best practices, such as regular backups, access controls, validation rules, and testing before deployment.

7. What is the difference between Force.com and Salesforce.com?

- Salesforce.com: Salesforce.com, also known as "Salesforce," is the cloud-based customer relationship management (CRM) software provided by Salesforce. It is one of the leading CRM solutions globally and is used by businesses to manage their sales, marketing, customer service, and other related activities. Salesforce.com provides a user-friendly interface and a wide range of features to help organizations streamline their customer interactions, track leads, manage accounts, automate sales processes, and more.

- Force.com: Force.com is the platform-as-a-service (PaaS) offering provided by Salesforce. It is the underlying development platform that powers Salesforce.com and allows developers to build custom applications and extend the functionality of Salesforce. With Force.com, developers can create and deploy custom business applications without the need to manage underlying infrastructure or worry about system maintenance. It offers tools and resources like Apex (a proprietary programming language), Visualforce (a mark-up language for building custom user interfaces), and various APIs for integration.

8. Is there a limit for data.com records?

Yes, there are limits on the number of data.com records available for Salesforce users. Data.com provides access to a database of business-to-business (B2B) contact and company data that can be used for sales and marketing purposes. The number of data.com records that a Salesforce organization can access depends on the type of Salesforce edition and the Data.com license level.

9. What is the difference between static and dynamic dashboards?

- Static Dashboard: A static dashboard is a type of dashboard where the components and data are fixed at the time of creation. In other words, the content of a static dashboard remains the same and does not change unless manually updated by the dashboard creator. The data displayed on a static dashboard is typically a snapshot of information taken at a specific point in time. Users viewing the dashboard see the same data each time they access it, regardless of any changes that may have occurred in the underlying records since the dashboard was last updated. Static dashboards are useful when you want to provide a consistent view of data or share specific insights with others without the risk of the information changing dynamically.

- Dynamic Dashboard: A dynamic dashboard, on the other hand, is a type of dashboard that provides real-time or near real-time data updates. The components and data on a dynamic dashboard are not fixed but instead refresh automatically based on predefined intervals or user interactions. Dynamic dashboards allow users to see the most current data available, providing a more up-to-date view of the metrics and key performance indicators (KPIs).

10. How can you edit apex classes in a production environment?

In Salesforce, avoid editing Apex classes directly in production. Instead, make changes in a sandbox, thoroughly test, and use deployment tools like Change Sets or Metadata API to move changes to production safely. This helps maintain stability and reduces the risk of introducing errors in the live environment.

11. What do you understand about workflow in Salesforce?

In Salesforce, a workflow is an automated process that allows you to define a series of actions and rules that trigger when certain conditions are met. Workflows are designed to streamline business processes, automate repetitive tasks, and ensure that specific actions are taken automatically in response to record changes.

12. What are some things that you can do to prevent governor limits?

Here are some key strategies to avoid hitting governor limits:

- Bulkily Code: Write your Apex code to handle bulk data processing efficiently. Avoid using SOQL queries or DML statements inside loops. Instead, bulkily your code by processing records in collections, such as lists and sets.

- Use Aggregate Queries: Utilize aggregate functions (e.g., COUNT, SUM, MAX, MIN) to perform calculations on large data sets, rather than using loops to calculate them manually.

- Avoid Nested Loops: Minimize nested loops in your code, as they can quickly lead to hitting CPU limits. Aim to use single loops whenever possible.

- Limit Query Results: Use LIMIT clauses in your SOQL queries to retrieve a specific number of records at a time. This can help manage heap size and avoid heap limits.

- Query Selectively: Make use of indexes and filter your queries efficiently to reduce the number of records retrieved. Select only the fields you need, rather than querying all fields.

13. What do you understand about workflow in Salesforce?

In Salesforce, a workflow is an automated process that allows you to define a series of actions and rules based on specific conditions. When these conditions are met, the workflow triggers predefined actions, such as field updates, email notifications, tasks, or outbound messages.

14. What are Permission sets?

In Salesforce, Permission Sets are a powerful way to grant additional permissions and access rights to users without changing their profiles. They allow administrators to extend user privileges beyond what is defined in their profiles, providing more flexibility in controlling user access to various Salesforce features and data.

15. What do you understand about validation rules in Salesforce?

In Salesforce, validation rules are used to enforce data quality and consistency by defining criteria that must be met when users create or update records. These rules help ensure that data entered into Salesforce adheres to specific business requirements and validation logic.

16. What do you understand about the term fiscal year or economical year in Salesforce?

In Salesforce, the term "fiscal year" or "financial year" refers to a defined 12-month period used for financial reporting and accounting purposes. The fiscal year does not always align with the calendar year (January to December) and can start on any date based on an organization's accounting practices or fiscal cycle.

17. Explain the types of SOQL statements in Salesforce.

In Salesforce, SOQL (Salesforce Object Query Language) is used to retrieve data from the Salesforce database. There are several types of SOQL statements that developers and administrators can use to query records and related data:

- Basic SOQL Queries: Basic SOQL queries are used to retrieve records from a single object based on specified criteria. The syntax is straightforward:

- Relationship Queries: SOQL allows you to query records from related objects using relationship fields. For example, if you have a custom object related to an Account, you can query its fields along with related Account fields:

- Aggregate Queries: Aggregate queries allow you to perform calculations on records. Common aggregate functions include COUNT, SUM, AVG, MIN, and MAX. These queries are useful for generating reports and summaries:

- Nested Queries: SOQL supports nested queries, also known as subqueries. You can use subqueries to retrieve data based on results from another query. For example:

- Parent-to-Child Queries: Parent-to-child queries allow you to traverse relationships in a hierarchical manner, starting from the parent object and querying its related child records. This is helpful when you need to retrieve all related child records for a specific parent:

- Order by and Limit: SOQL allows you to use ORDER BY to sort query results and LIMIT to limit the number of records returned:

18. What is Salesforce Lightning?

Salesforce Lightning is a modern user interface framework and design system developed by Salesforce. It is designed to provide a more intuitive, responsive, and engaging user experience across various devices and platforms, including desktops, tablets, and mobile devices. Salesforce Lightning represents a significant upgrade from the classic Salesforce user interface and offers a range of enhanced features and functionalities.

19. How does Salesforce track sales?

Salesforce tracks sales in a variety of ways, including:

- Opportunities: Opportunities are records of potential sales that are tracked in Salesforce. They include information about the customer, the product or service being sold, the expected close date, and the probability of closing the deal.

- Activities: Activities are any tasks or interactions that are related to an opportunity, such as phone calls, emails, meetings, or tasks. Activities are tracked in Salesforce to help sales reps stay organized and track their progress on deals.

- Reports and dashboards: Salesforce provides a variety of reports and dashboards that can be used to track sales performance. These reports can be customized to show information such as closed deals, open opportunities, and lead conversion rates.

- Pipelines: Pipelines are visual representations of the sales process. They show the different stages that a deal goes through, from lead to closed won. Pipelines can be used to track the progress of deals and identify areas where sales reps need to focus their efforts.

- Salesforce Analytics: Salesforce Analytics is a suite of tools that can be used to analyze sales data. These tools can be used to identify trends, patterns, and insights that can help sales reps improve their performance.

20. What is a static resource in Salesforce?

A static resource in Salesforce is a file that can be referenced in a Visualforce page. Static resources can include images, style sheets, JavaScript files, and other types of files. Static resources are stored in the Salesforce Content Delivery Network (CDN), so they are accessible to users from anywhere in the world. Static resources are a great way to improve the performance of Visualforce pages. When you reference a static resource in a Visualforce page, the file is only downloaded once, when the page is first loaded. This can improve the performance of the page, especially for pages that contain large images or JavaScript files.

21. What are the 3 types of Object relations in Salesforce?

- Lookup relationships: A lookup relationship is the most basic type of relationship. It creates a child-parent relationship between two objects. For example, an Account object can have a lookup relationship to a Contact object. This means that each Account record can have one or more related Contact records.

- Master-detail relationships: A master-detail relationship is a more complex type of relationship. It creates a strong parent-child relationship between two objects. For example, a Product object can have a master-detail relationship to a Price book object. This means that each Product record must have one and only one related Price book record.

- Many-to-many relationships: A many-to-many relationship is the most complex type of relationship. It allows you to create a relationship between two objects where each object can have multiple related records from the other object. For example, a User object can have a many-to-many relationship to a Group object. This means that each User can be a member of multiple Groups, and each Group can have multiple members.

22. What is an Audit trail?

In Salesforce, an audit trail refers to a feature that tracks and logs changes made to records and setup configuration within the platform. It provides a historical record of activities and modifications, allowing administrators and users to review and monitor changes over time. The audit trail helps ensure data integrity, compliance, and accountability within the Salesforce environment.

23. What is a wrapper class?

In Salesforce, a wrapper class is a custom Apex class that is used to encapsulate multiple data types or objects into a single object. It allows you to combine different types of data or objects into a unified structure, making it easier to work with and pass around in your Apex code.

24. What are some benefits of using Salesforce?

- Streamlined sales processes and improved efficiency.

- Centralized customer data for better relationship management.

- Enhanced collaboration and teamwork.

- Scalability and flexibility to adapt to business growth.

- Data-driven decision making for informed choices.

- Integration capabilities for seamless data flow.

- Mobile access for productivity on the go.

- Customization to align with specific business needs.

- Strong security measures for data protection.

- Supportive user community and comprehensive resources.

25. What is the junction object and what purpose does it serve?

A junction object is a custom object that serves as a bridge or connector between two related objects in a many-to-many relationship. It allows you to create a relationship between records from different objects, enabling more complex data modelling and data management. Junction objects are widely used in Salesforce when dealing with complex relationships like many-to-many or when you need to store additional information specific to the relationship between two objects. They provide an elegant and flexible way to model these types of relationships, ensuring data accuracy and consistency within the Salesforce platform.

26. What are the different types of reports available in Salesforce?

- Tabular Reports: Present data in a table format.
- Summary Reports: Group data and display subtotals and grand totals.
- Matrix Reports: Summarize data in a grid-like layout.
- Joined Reports: Combine data from multiple sources into one report.
- Cross-Summary Reports: Display summarized data in rows and columns.
- Chart Reports: Visualize data in graphical formats.
- Dashboard Reports: Consolidate multiple reports and charts in a single dashboard.
- Historical Trend Reports: Analyse data over time to track changes and patterns.
- Lightning Report Builder: Modern tool for creating custom reports with a user-friendly interface.

27. How is SaaS beneficial in Salesforce?

SaaS in Salesforce provides cost savings, easy accessibility, scalability, data security, continuous updates, seamless integration, customization options, collaboration features, and powerful analytics for businesses using the CRM platform.

28. What can cause data loss?

Data loss in Salesforce can occur due to various reasons, including:

- Human Error: Accidental deletion, overwriting of data, or incorrect data updates by users can lead to data loss if proper backup and recovery mechanisms are not in place.

- System Issues: Technical problems or software glitches can cause data loss. This can include issues with data synchronization, data corruption, or software bugs that result in the loss or corruption of records.

- Data Migration: During data migration from external systems or during data imports, errors in data mapping, transformations, or validation processes can result in data loss or data integrity issues.

- Integration Errors: When integrating Salesforce with other systems or applications, issues such as data mapping errors, failed data transfers, or data mismatches can lead to data loss or inconsistencies.

- Security Breaches: Unauthorized access or data breaches can result in data loss or compromise. It is crucial to have robust security measures in place to protect data from external threats.

29. Can two users have the same profile? Can two profiles be assigned to the same user?

Profiles determine the level of access a user can have in a Salesforce org. As far as the first part of the question is concerned, Yes. One profile can be assigned to any number of users. Take the example of a Sales or Service team in a company. The entire team will be assigned the same profile. The admin can create one profile: Sales Profile, which will have access to the Leads, Opportunities, Campaigns, Contacts and other objects deemed necessary by the company. In this way, many users can be assigned the same profile. In case the team lead or manager need access to additional records/ objects then it can be done by assigning permission sets only for those users.

30. What are Governor Limits in Salesforce?

In Salesforce, it is the Governor Limits which controls how much data or how many records you can store in the shared databases. Why? Because Salesforce is based on the concept of multi-tenant architecture. In simpler words, Salesforce uses a single database to store the data of multiple clients/ customers. The below image will help you relate to this concept. To make sure no single client monopolizes the shared resources, Salesforce introduced the concept of Governor Limits which is strictly enforced by the Apex run-time engine. Governor Limits are a Salesforce developer's biggest challenge. That is because if the Apex code ever exceeds the limit, the expected governor issues a run-time exception that cannot be handled. Hence as a Salesforce developer, you have to be very careful while developing your application. To learn more about it, enrol for Salesforce Developer Certification today.

Different Governor Limits in Salesforce are:

- Per-Transaction Apex Limits

- Force.com Platform Apex Limits

- Static Apex Limits

- Size-Specific Apex Limits

- Miscellaneous Apex Limits

- Email Limits

- Push Notification Limits

31. What is a sandbox org? What are the different types of sandboxes in Salesforce?

A sandbox is a copy of the production environment/ org, used for testing and development purposes. It's useful because it allows development on Apex programming without disturbing the production environment. You can use it when you want to test a newly developed Force.com application or Visualforce page. You can develop and test it in the Sandbox org instead of doing it directly in production. This way, you can develop the application without any hassle and then migrate the metadata and data (if applicable) to the production environment. Doing this in a non-production environment allows developers to freely test and experiment applications end to end.

Types of Sandboxes are:

- Developer
- Developer Pro
- Partial Copy
- Full

32. What are the different data types that a standard field record name can have?

A standard field record name can have data type of either auto number or text field with a limit of 80 chars. For generating auto numbers, the format needs to be specified while defining the field and after that for every record that is added, the number will get auto generated. For example: -

- Sr No- {1}
- Sr No- {2}
- Sr No- {3}

33. What are the different types of email templates that can be created in Salesforce?

The different types of Email templates are listed in the below table: -

Text	All users can create or change this template
HTML with letterhead	Only Administrators and users having "Edit HTML Templates" permissions can create this template based on a letterhead.
Custom HTML	Administrators and users having "Edit HTML Templates" permissions can create this template without the need of a letterhead.
Visualforce	Only administrators and developers can create this template. Advanced functionalities like merging data from multiple records is available only in this template.

34. What is a bucket field in reports?

A bucket field lets you group related records together by ranges and segments, without the use of complex formulas and custom fields. Bucketing can thus be used to group, filter, or arrange report data. When you create a bucket field, you need to define multiple categories (buckets) that are used to group report values. The advantage is that earlier, we had to create custom fields to group or segment certain data.

35. What are dynamic dashboards? Can dynamic dashboards be scheduled?

Before we understand dynamic dashboards, let us first understand static dashboards. Static dashboards are the basic dashboard types that will be visible to any user who has made a report out of his data. An example of this is what a Sales manager/ Marketing manager would be able to see on his Salesforce org. In other words, a normal dashboard shows data only from a single user's perspective. Now comes the concept of dynamic dashboards. Dynamic dashboards are used to display information which is tailored to a specific user. Let us consider the same example as above. In case the Sales manager wants to view the report generated specific to only one of his team members, then he can use dynamic dashboards. You can use dynamic dashboards when you want to show user-specific data of a particular user, such as their personal quotas and sales, or number of case closures, or leads converted etc. You can also use a normal/ static dashboard when you want to show regional or organization-wide data to a set of users, such as a particular region's sales number, or a particular support team's performance on case closures. As far as the second part of the question is concerned, no we cannot schedule a dynamic dashboard. That is because whenever we open the dashboard, it will show the data generated in real-time.

36. What happens to detail record when a master record is deleted? What happens to child record when a parent record is deleted?

In a Master-Detail relationship, when a master record is deleted, the detail record is deleted automatically (Cascade delete). In a Lookup relationship, even if the parent record is deleted, the child record will not be deleted.

37. Can you have a roll up summary field in case of Master-Detail relationship?

Yes. You can have a roll-up summary in case of a master-detail relationship. But not in case of a lookup relationship.

38. What are the different types of object relations in salesforce? How can you create them?

The questions list is incomplete without involving relationships between objects in Salesforce. Relationships in Salesforce can be used to establish links between two or more objects.

The different types of object relationships in Salesforce are:

- Master-Detail Relationship (1: n): - It is a parent-child relationship in which the master object controls the behaviour of the dependent child object. It is a 1: n relationship, in which there can be only one parent, but many children. The main concept you need to be know is that, being the controlling object, the master field cannot be empty. If a record/field in master object is deleted, the corresponding fields in the dependent object are also deleted. This is called a cascade delete. Dependent fields will inherit the owner, sharing and security settings from its master. You can define master-detail relationships between two custom objects, or between a custom object and standard object as long as the standard object is the master in the relationship.

- Lookup Relationship (1: n): - Lookup relationships are used when you want to create a link between two objects, but without the dependency on the parent object. Similar to Master-Detail relationship, you can think of this as a form of parent-child relationship where there is only one parent, but many children i.e. 1: n relationship. The difference here is that despite being controlling field, deleting a record will not result in automatic deletion of the lookup field in the child object. Thus the records in the child object will not be affected and there is no cascade delete here. Neither will the child fields inherit the owner, sharing or security settings of its parent.

- Junction Relationship (Many-To-Many): - This kind of a relationship can exist when there is a need to create two master-detail relationships. Two master-detail relationships can be created by linking 3 custom objects. Here, two objects will be master objects and the third object will be dependent on both the objects. In simpler words, it will be a child object for both the master objects.

39. Can you have a roll up summary field in case of Master-Detail relationship?

Yes. You can have a roll-up summary in case of a master-detail relationship. But not in case of a lookup relationship. A roll-up summary field is used to display a value in a master record based on the values of a set of fields in a detail record. The detail record must be related to the master through a master-detail relationship. There are 4 calculations that you can do using roll-up summary field. You can count the number of detail records related to a master record. Or, you can calculate the sum, minimum value, or maximum value of a field in the detail records.

40. Explain the term "Data Skew" in Salesforce.

"Data skew" is a condition which you will encounter when working for a big client where there are over 10,000 records. When one single user owns that many records we call that condition 'ownership data skew'. When such users perform updates, performance issues will be encountered because of "data skew". This happens when a single user/ members of a single role owns most of the records for a particular object.

41. Explain skinny table. What are the considerations for Skinny Table?

In Salesforce, skinny tables are used to access frequently used fields and to avoid joins. This largely improves performance. Skinny tables are highly effective, so much so that even when the source tables are modified, skinny tables will be in sync with source tables.

Considerations for skinny tables:

- Skinny tables can contain a maximum of 100 columns.
- Skinny tables cannot contain fields from other objects.
- For full sandboxes: Skinny tables are copied to your Full sandbox organizations, as of the Summer '15 release.

42. Which fields are automatically Indexed in Salesforce?

Only the following fields are automatically indexed in Salesforce:

- Primary keys (Id, Name and Owner fields).

- Foreign keys (lookup or master-detail relationship fields).

- Audit dates (such as SystemModStamp).

- Custom fields marked as an External ID or a unique field.

43. What are custom labels in Salesforce? What is the character limit of custom label?

Custom labels are custom text values that can be accessed from Apex classes or Visualforce pages. The values here can be translated into any language supported by Salesforce. Their benefit is that they enable developers to create multilingual applications which automatically presents information in a user's native language. You can create up to 5,000 custom labels for your organization, and they can be up to 1,000 characters in length.

44. What is the difference between a Role and Profile in Salesforce?

As mentioned in one of the previous questions, a profile will ultimately control access to which records a user has in a Salesforce org. No user can work on the Salesforce org without being assigned a profile. The Profile is therefore mandatory for every user. Role however is not mandatory for every user. The primary function of the Role/ Role hierarchy is that it allows higher level users in hierarchy get access to records owned by lower level users in the hierarchy. An example of that is Sales Managers getting access to records owned by Sales Reps while their peers do not get access to it.

45. What are the examples of non-deterministic Force.com formula fields?

Before I mention some of the examples, let me give you an introduction to deterministic and non-deterministic formula fields. Formula fields whose value will be static are referred to as deterministic fields. Whereas, formula fields whose value will be changed dynamically or whose values will have to be calculated on the fly, they are referred to as non-deterministic formula fields. A classic example of that is a formula returning the current date and time.

Some examples of non-deterministic fields in Force.com are:

- Lookup fields

- Formula fields whose reference spans over other entities

- Fields having dynamic date functions like: - TODAY () or NOW ()

46. Why do we need to write test classes? How to identify if a class is a test class?

Software developers from around the world will unanimously agree that writing code in test classes makes debugging more efficient. Why? That is because test classes help in creating robust and error-free code be it Apex or any other programming language. Since Unit tests are powerful in their own right, Salesforce requires you to write test classes in Apex code. Why are they so powerful? Because test classes and test methods verify whether a particular piece of code is working properly or not. If that piece of code fails, then developers/ testers can accurately locate the test class having the faulty bug. Test classes can be determined easily because every test class will be annotated with @is Test keyword. In fact, if we do not annotate a test class with @is Test, then it cannot be defined as a test class. Similarly, any method within a class which has the keyword test Method, is a test method.

47. What is minimum test coverage required for trigger to deploy?

In Salesforce, if you want to deploy your code to production, then you must make sure that at least 75% of your Apex code is covered by unit tests. And all these tests must complete successfully.

48. What are the different ways of deployment in Salesforce?

You can deploy code in Salesforce using:

- Change Sets

- Eclipse with Force.com IDE

- Force.com Migration Tool – ANT/Java based

- Salesforce Package

49. What is an external ID in Salesforce? Which all field data types can be used as external IDs?

An external ID is a custom field which can be used as a unique identifier in a record. External IDs are mainly used while importing records/ data. When importing records, one among the many fields in those records need to be marked as an external ID (unique identifier). An important point to note is that only custom fields can be used as External IDs. The fields that can be marked as external IDs are: Text, Number, E-Mail and Auto-Number.

50. What is an object in Salesforce?

In Salesforce, objects are database tables that are used to store the data of an organization. There are two types of objects in Salesforce.

 They are:

- Standard object: These are the objects provided by the Salesforce platform, which includes contacts, accounts, cases, campaigns, opportunities, leads, products, contracts, reports, dashboards, etc.

- Custom object: They are objects created by developers based on the business process. It stores the important and unique information of an organization. It gives a structure for data sharing. The custom object includes page layouts, custom fields, relationship to other objects, custom user interface tab, etc.

51. Explain different types of apps we can use in Salesforce.

There are two types of apps that we can create in Salesforce. They are:

- Custom app: They are mainly used by business owners who want to build an app that suits their business requirements from time to time. It's widely used in the market.
- Console app: It can be used only in the client service business, where we focus on tackling the client's issues. Compared to a custom app it's not widely used in the market.

52. What is sharing rule?

Sharing rules are applied when a user wishes to permit access to other users like public groups, roles, or territories. It gives greater access to particular users by making automatic exceptions to your organization-wide sharing settings. You can define total sharing rules up to 300 for a particular object, including criteria-based or guest user sharing rules up to 50, if available for the object.

53. What is an Audit trail in Salesforce?

An Audit trail in Salesforce is a unique feature that helps in tracking the changes made in the organization by you and other administrators. In that way, you will always get to know who has modified the project at the last minute. It is helpful for the organization with more administrators. By using an audit trail, you can get to know the details about changes made, the date and time of the change, and the username of the team member who made the changes.

54. What is the difference between role and profile?

The main difference between role and profile is given below –

Role	Profile
The role helps in defining data visibility for a particular user.	A profile sets the limitation for what a user can do in the organization.
Based on the hierarchy, a role defines which user data a user can see.	Profile defines permissions.
Defining role to a user is not mandatory.	Defining profile is mandatory.
Roles provide a feature to control access to records by impacting reports. For example, "My Teams" filter. Roles function if a security model (OWDs) of an organization is set to private.	Profiles help to decide record privileges i.e. assuming the user can observe the record, it concludes what the user can function, edit, delete, view on that record. It controls other system privileges like export data, mass email, etc.

55. What is a profile in Salesforce? Can two users have the same profile?

The profile in Salesforce is defined as a collection of settings and permissions that define what a user can do in Salesforce. So it gives you the authority to access certain records in Salesforce. There are multiple profiles available in Salesforce. For example, a sales profile can have access to leads, contacts, campaigns, opportunities, etc. The people who work under one department may be assigned the same profiles. Consider the case of sales profile, many people work under it and each person who works under this is assigned with the same profile. Hence we can say that any number of people can have the same profile.

56. What is a Master–Detail relationship in Salesforce?

- Master-Detail relationship is a relationship between a parent and child where the master represents the parent and the detail represents a child. This relationship can be used when we want to control the display of detail records based on the value present in the master record.

- The master object completely takes control of the behaviour of the Detail object. The survival of the child is dependent on the parent, because if the parent gets deleted then the child automatically gets deleted. You can create Roll-up summary fields in master records which will calculate the SUM, AVG, and MIN of the child records.

- Consider an example of a courier company model, where a delivery schedule is always linked to a delivery location. If we delete a delivery location from our list, then all the related delivery schedules should also be removed. Such a dependency can be achieved only through a Master-Detail relationship.

57. What is Apex in Salesforce?

- Apex is a strongly typed and object-oriented programming language that permits developers to execute flow and transaction control statements on Salesforce platform servers in conjunction with calls to the API. It uses syntax that looks similar to Java and pretends like database stored procedures.

- Apex allows developers to add business logic to many system events, including Visualforce pages, button clicks, and related record updates. This code can be initiated by requests from web services and from triggers on objects.

- All Apex code runs completely on-demand on the Lightning platform. Apex code is written and saved to the platform by developers. Through the user interface, end-users trigger the execution of Apex code.

58. What are the benefits of using Salesforce CRM?

The benefits of using Salesforce CRM is given below:

- Communicate using automation tools: With the help of Salesforce Einstein Bots, its features can automatically respond to chats on time. Thus avoids giving delayed response.

- Data syncing from different applications: Data from other applications such as Mail Chimp and G Suite can be integrated into the Salesforce platform. This removes the difficulty of moving from one software to another. Using Salesforce mobile app, you can keep track of your data anytime and anywhere.

- Utilization of data analytics tools: Salesforce's Einstein Analytics gives insights so that users can address the changing data right away. Salesforce has a collection of reporting tools and dashboards that will help you collect information and work on it properly.

- Following customer activity: It helps to understand the customer's journey through the sales cloud so that you will have easier access to their behaviour and background. You can review the click rates on your email campaigns to help you recognize what works best for your customers.

- Assisting customers through chat: A chat box is provided by the service cloud's live agent depending on the interaction of your customers or followers on your web page. By connecting with the customer profile, your service team can deliver answers. This is helpful in improving customer experiences by letting agents respond quickly.

- Using an Omni channel feature: Multi-channel feature provided by the service cloud automatically shifts conversations from various channels directly to the agents. This gives them one place to connect with customers through calls, social media, chat, messaging, or email.

- Consistent engagement with current customers: Looking for a new customer is more expensive than keeping the current ones. Use the gathered data in Salesforce's CRM to create consistent marketing campaigns.

- You can build apps: Force.com, a Platform as a Service(PaaS) simplifies customizing and building apps for any device without using a complicated infrastructure.

59. What is dashboard in Salesforce?

A dashboard in Salesforce is a pictorial representation of the report. It displays data from source reports as visual components. These components provide a snapshot of key metrics and performance indicators of the organization at a single glance. A single dashboard is capable of displaying 20 reports at a time.

60. Explain the Force.com platform

Force.com is the entire framework and codebase on which the whole Salesforce application exists. We can also say that Salesforce is built on Force.com, which is a Platform as a Service (PaaS) that allows us to simplify the design, development, and deployment of cloud-based applications and websites. Developers can work with Cloud Integrated Development Environment (Cloud IDE) and deploy the applications on the servers of Force.com.

61. Explain different components of dashboard available in Salesforce.

Some of Salesforce dashboard components are explained below:

- Gauge: It is used for displaying a single value within a custom value range.

- Metric: This is used for showing a single pair of key–values. We can enter the metric label directly on the components by clicking the empty text field next to the grand total. All metrics placed in the dashboard column would be displayed as a single component.

- Table: Tables are used for showing report data in the form of lists. For example, top five or bottom five opportunities.

- Visualforce page: It is used for forming a custom component as a dashboard or displaying information that is not available in other component types.

- Charts: It is used for showing comparisons. Charts are divided into 6 types. They are line Chart, vertical bar chart, horizontal bar chart, donut, pie, and funnel.

62. What are validation rules in Salesforce?

- Validation rules in Salesforce consist of a formula or expressions that evaluate the data in one or more fields in a record to meet the standards you specify before the user can save the record. It returns a "True" or "False" value based on the evaluation of the data. Validation rules are responsible for displaying an error message to the user when the condition is "True" due to an invalid value.

- Validation rules are helpful in enforcing integrity constraints against the data. Here we give conditions in the formula editor. If one validation rule fails, Salesforce proceeds to check another validation rule held within the field or record and shows an appropriate error message at that particular field or above the record.

- You are allowed to create validation rules for fields, objects, campaign members, or case milestones. For example, we can create a validation rule that fires when a user tries to save an account with the incorrect length for the account number.

63. What do you understand by the term cloud computing?

If you know earlier big companies used to maintain their servers which were providing the data storage and computing resources which were very costly to maintain, moreover not necessarily each company was utilizing their servers to fullest or if they wanted to expand the computing power it was not an easy task. Cloud computing is like the on-demand availability of computer system resources, data storage, and computing power without being managed by the user utilizing them. And it's effortless to increase or decrease the resources you want for yourself. Example AWS.

64. Are virtualization and cloud computing the same thing?

No, they are not the same thing; in exact words, virtualization is the technology while cloud computing is a methodology. To generate multiple simulated environments from a single piece of the underlying hardware. Cloud computing is a set of approaches to deliver data storage, computation power, infrastructure, etc., to users on-demand across any network.

65. What is PaaS? Is Salesforce a PaaS or SaaS?

Platform as a service (PaaS) is a category of cloud computing services that allow customers to develop, run applications without the complexity of building and maintaining the infrastructure typically associated with developing and launching the application(s); Salesforce is both PaaS and SaaS, and it is SaaS as Salesforce provides you with a set of software offered in an on-demand model. Salesforce jobs are doubled in the past 2 years, get enrolled for the free demo at cars info solutions. PaaS as Salesforce Lightning Platform's built-in features and functionality take care of back-end concerns such as security, infrastructure, and data integration to focus on building only apps rather than worrying about other things.

66. What is a public cloud?

Public Cloud – In simple terms, it's a hosting solution where your data is stored in the provider's data centre. He is accountable for maintaining and manage the data centre and is being shared with other organizations. Salesforce is a public cloud.

67. What is a junction object in Salesforce?

Salesforce provides various types of relationships with objects that help you to connect objects in different ways. A junction object is useful when you want to create many-to-many relationships in Salesforce. This object is useful when a normal parent-child or one-to-many relationship is not applicable. They can be created by custom objects and then relating these objects with two relationships such as master and detail relationships. It becomes important when you are modelling specific data schemas in Salesforce. For example, a platform Study Solutions works like a junction object as it stores many-to-many relations between the study object and the solution object. However, the relation between the study object and the solution object is a junction relationship in Salesforce.

68. What are the benefits of a cloud solution such as Salesforce?

Some benefits of Salesforce are that it can help manage customer data, automate and streamline processes, and provide insights into customer behaviour. Additionally, Salesforce can help sales teams increase productivity, close more deals, and improve customer relationships. Check out the sales management course to learn how to effectively manage your sales team.

69. What causes data loss in Salesforce?

There can be several reasons for data loss in Salesforce that including:

- Integration Errors: These errors can be one of the reasons for data loss in salesforce and they can occur when companies are integrating internal systems and applications with Salesforce like marketing tools and others. The changes to default configurations result in unexpected behaviour of the platform causing data loss or corrupted data.
- Migration Errors: Migrations are very helpful for moving a huge amount of data somewhere else. To carry out migrations, it becomes important to consolidate the data and make complex transformations that increase the risk of data loss.
- Human Error: Accidents can happen anytime and anywhere. It is more often the reason for data loss is a human intervention with the data. Having more than one administrator can also cause data loss as all the admins have the same permissions to access the data and any change done by one administrator may lead to data loss.

70. What is the difference between data and metadata in Salesforce?

- Data – The records that a business relies on. Such as accounts, contacts, users, etc.
- Metadata – The data that describes other data. It is related to the fields, code, configurations, page layouts, and logic that go into building the look of the salesforce environment.

71. What is an Apex transaction?

Apex transaction is used for the representation of a set of operations. These operations are executed as a single unit and all these operations are either completed successfully or not. This is because the entire transaction in Apex is rolled back and if any error occurs in even a single operation, then no data is committed to the database. The operations that come inside the transaction boundary do represent only a single unit of operation. The apex transactions ensure the integrity of data as the code runs as a part of atomic transactions in Apex. All the DML operations in Apex Transactions represent a single unit only and this also applies to the calls that are made from the transaction boundary for the external code.

72. Explain the skinny table. What are the considerations for the skinny table?

Skinny tables are useful when we want to access the fields which are most frequently used to avoid the joins. Skinny tables improve the performance of specific operations that are read-only types and these operations can be list views and reports. These tables sync with the source tables whenever any source table is modified and that's the reason they are highly effective.

In order to use skinny tables in your Salesforce account, you are required to contact Salesforce customer support. Because you cannot create these tables by yourself. Therefore, you need to contact the customer support of Salesforce to create these skinny tables.

The considerations for the skinny table are as follows:

- The table cannot hold values from other objects.
- Skinny tables are only capable of containing only 100 columns at most.
- These skinny tables can be easily copied to the full sandbox of your organization.

73. Give an example of a custom App you could build on the Salesforce platform.

Salesforces enables you to take customizations a level further by allowing us to build custom applications on the platform. Sales & Service Clouds are set up with various features that have been designed for this specific purpose. A few examples are:

- Goal setting applications to help managers track their team's targets and goals
- HR application to allow internal teams or recruiters to manage job applications
- Finance systems to help with tracking of invoices and payments

74. What are the different types of email templates available in Salesforce?

The different types of email templates in Salesforce are as follows:

- HTML with letterhead: These types of email templates are accessible to only administrators and users with permission of "Edit HTML Templates" based on the letterhead.
- Custom HTML: These email templates can be created by users and administrators with the permissions of "Edit HTML Templates" by using a letterhead.
- Text: These email templates are accessible to everyone in the organization and all the users are allowed to modify or create these templates.

75. What are custom labels in Salesforce? What is the character limit of the custom label?

The custom labels in Salesforce are the labels used by developers for developing multilingual applications. These applications are used for the representation of the information to the users in their native languages. Custom labels are very useful to work with customized values as it allows users of different languages to access the information in that application. In Salesforce, you can create up to 5000 custom labels in which the character limit of a single custom label is 1000. However, if the custom labels are created from managed packages, then it doesn't count under this limit.

76. What are the three types of bindings used in Visualforce? What does each refer to?

In Visualforce, we have three types of bindings such as:

- Data Bindings: This binding refers to the data set in the controller.

- Component Bindings: Visualforce components are referred to by the component bindings.

- Action Bindings: The action methods are triggered by action bindings in visual force.

77. What are the different types of collections in Apex? What are maps in Apex?

Collections in Apex are the composite data types that permit the developers to combine or collect multiple types of data into a single variable. There are three different types of collections in Apex such as List, Map, and Set.

- List: A list is an ordered collection of elements that can be distinguished by their indices.

- Map: Maps are also known as 'Key/Value" pairs which mean maps are collections with the index values having specific keys for each index number.

- Set: Sets are just like lists where they have a collection of elements but the only difference is that the elements are unordered in sets.

78. Why are Visualforce pages served from a different domain?

The only reason behind the visual force pages being found on different domains is Security. In order to keep control over customizable and non-customizable things, Salesforce keeps Visualforce pages on different domains.

79. What are Who'd and What ID in activities?

- Who ID is used for people's things and it uses Lead ID or contact ID in activities.

- What ID is used for things that are objects and it takes Account ID or an Opportunity ID for reference in activities.

80. How can you embed a Visual flow in a Visualforce page?

There are some steps that you need to perform to embed a visual flow in a Visualforce page:

- Go to Setup, then find the Flows in Quick Find Box and then select Flows.

- Click on the name of the flow and copy the API's name.

- Now, again from Setup, enter the Visualforce pages and click on define a new visual force page.

- Add the <flow: great learning> component at some place between the <apex: page> tags.

- Now you need to set up the name of your Visual flow:

- Click Save.

- If you want to restrict this visual flow to some users, then you can do this by going to the security of visual force pages and enabling the profiles by adding them to them.

- Lastly, you need to add the visual force page to your application by the use of a custom link or a button.

So, these were the steps that should be followed to add a Visual flow to Visualforce pages.

81. What are the different methods of batch Apex class?

There are three different methods of Batch Apex Class in Salesforce:

- Start Method: This method is called at the beginning of the apex job. This method is called once and returns Database.QuerLocator or variables, records, objects that passed to the job.

- Execute Method: It is called for each batch of records that are passed to the job. The default batch size for executing the method is 200 records and the maximum number of records it can take up to is 2000 records. There is no guarantee that all the records will execute in the order they are received from the start methods.

- Finish Method: The finish method is used for the execution of post-processing operations such as sending an e-mail. This method is called after all the batches are processed.

82. Can you have a roll-up summary field in case of a Master-Detail relationship?

You can have a roll-up summary field for the Master-Detail relationship in Salesforce, but the lookup relationship is not well to have a roll-up summary. Roll-up summary fields are useful when we want to show a value in master records depending on the values of a set of fields in our detail records. But the detail records must be related to the master-detail relationship. There are four calculations that you can perform by using a roll-up summary such as counting the total number of detail records, sum, and finding the minimum or maximum value.

83. What are the examples of non-deterministic Force.com formula fields?

The examples of non-deterministic force.com formula fields include the following:

- Fields that have dynamic data function in them such as TODAY () or NOW ()
- Lookup Fields
- The formula fields work as a reference for other entities.

84. Explain the term "Data Skew" in Salesforce.

Data Skew is a condition in Salesforce where the large dataset is distributed unevenly. This condition occurs when there are more than 1000 records of child object that relates to only a single parent object in that record.

85. There is a profile by name 'ReadAccessProfile' and two users User1 and User2 have been assigned to it. There is an object X. I want to have Read Write access for User1 and Read-only access for User2 for object X. How can this be accomplished?

- Step 1: Read Access for both users is common hence in the Profile settings give 'Read' access for the object 'X'. By doing this User U2 will be able to read all the records (One condition satisfied) but User1 will only be able to read the records (Second condition not satisfied).
- Step 2: So next what we do is we create a permission set say 'GrantWriteAccess' and in this permission set we give the object 'X' the Write access and assign the user User1 to this permission set. (Second condition satisfied).

86. I have two objects Object1 and Object2 which are not related to each other. Now I want to create a Master-Detail Relationship(MDR) between these objects. How can I do this?

- Scenario 1: If the two objects are new and there are no records in each. Then we can create a Master-detail relationship by creating the field in Setup.

- Scenario 2: If the two objects exist prior to this requirement and have records. If this is the scenario, then we should first create a lookup relationship between the two objects and make sure that all the values are filled and then convert the relationship to master-detail from lookup.

87. What is the difference between profile and role? Can a user be assigned two profiles?

A Salesforce profile controls the following key aspects pertaining to Salesforce:

- Field Level Security – Here, the users are restricted to creating, reading, editing, and deleting fields according to specific requirements.
- Page Layouts – This restricts the page layouts a Salesforce user is permitted to see.
- Custom Apps – This restricts all the custom and standard apps that can be viewed and accessed by a Salesforce user.
- Record Types – This restricts the record types available to specific Salesforce users.
- Login – This restricts the login hours of Salesforce users onto the platform based on specific requirements.
- Tabs – This restricts the tabs that can be accessed and viewed by Salesforce users.

There are two major types of user profiles in Salesforce – standard profiles and custom profiles. While a standard profile is already provided by Salesforce, a custom profile can be created by the users based on their specific requirements.

88. What is the difference between permission sets and sharing rules?

A Permission Set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Sharing rules are used to extend sharing access to users in public groups, roles, or territories. Sharing rules give particular users greater access by making automatic exceptions to your org-wide sharing settings.

89. What are the different ways to deploy to production?

The different ways to deploy to production are:

- Change Sets
- Eclipse with Force.com IDE (Deprecated)
- Force.com Migration Tool – ANT/Java based
- Salesforce Package
- Viscose Salesforce Extension Pack
- Salesforce Code Builder

90. What does the lightning component bundle contain?

The lightning component contains the following:

- Component
- Controller
- Helper
- Style
- Documentation
- Renderer
- SVG
- Design

91. What is the minimum test coverage required to deploy to production?

The minimum test coverage required is 75% to deploy to production. If this is not satisfied, then the apex class or trigger cannot be deployed to production.

92. Name the different lightning component models?

The two lightning component models are

- Aura Component Model
- Lightning Web Component Model

93. What is Lightning App Builder?

The lightning app builder is used to create lightning pages for the Salesforce Lightning experience and mobile apps. The Lightning App Builder is a point-and-click tool. Lightning Pages are built using Lightning components which are compact, configurable, and reusable elements that can be dragged and dropped into different regions of the page in the Lightning App Builder. It is very useful and easy to use.

We can use it to create:

- App Page
- Home Page
- Record Page

94. What are the tools used in Lightning?

- Lightning App Builder
- Lightning Connect
- Lightning Schema Builder
- Lightning Process Builder

95. What are the advantages of using Lightning?

- Better Performance

- Out-of-the-box component set

- Faster development

- Multiple device and cross-browser compatibility

- Event-driven architecture

- Rich component ecosystem

96. Where can we use Lightning Components?

We can use lightning components as:

- Drag and drop components in Lightning App Builder and Community Builder

- Quick Action buttons

- Lightning pages

- Lightning Record pages

- Stand-alone Apps

- Overriding standard actions

97. How can we assign Lightning Pages?

Lightning pages can be assigned in three ways:

- The org default

- App default

- App, record type, profile

98. What is the difference between Standard and Custom reports?

Standard reports are created by Salesforce when we create objects and relationships. Custom report fields can be specified by the admin. We can also associate up to 4 objects.

99. What is a dashboard?

Dashboard can be simply put as a graphical representation of reports which can be tailored to a user and can also be set to a standard representation that is the same for all users. Dashboards can have up to 20 components. Dashboards show data according to the last run report.

100.   What is a dynamic Dashboard?

Dynamic dashboards are used to display details according to the user's security settings. It does not refresh on its own. It refreshes when the page is refreshed. Dynamic dashboards help to show data that is specific to that user and the data to which he has access.

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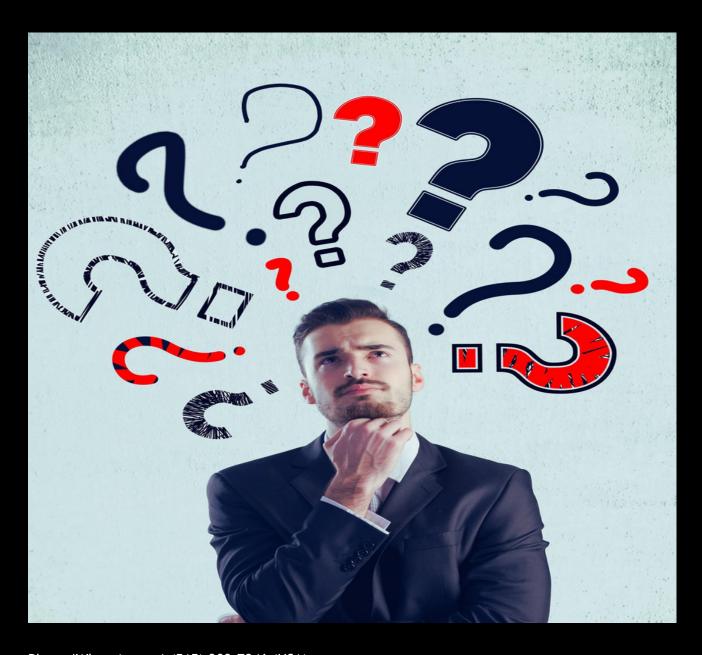SALESFORCE LEARNER COMMUNITY

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