Salesforce Admin

1. **What are general steps will you take to create a setup for a Real-time project?**
   1. First we create Apps, Objects, Fields and Relationships.
   2. Then will make OWD (Org Wide Default) as Private. 99% of projects we make this OWD as Private.
   3. Create Profile based on the client requirement.
   4. We will give the basic fundamental access that is CRED/CRUD (Create, Read, Edit/Update/Delete) access on which the particular profile needs to work.
   5. Also give access to App, Tab etc.
   6. Then work on Login Hours, IP Ranges at the Profile level
   7. Create users as per the information given by the client.
   8. Add users into that profile.
   9. Work on building functionalities

1. **What is the order of execution in salesforce?**
2. **Difference Between Freeze User and Deactivate User?**
   1. "Freezing" only stops the user from being able to login. Records can also be shared to freezed users.
   2. When you "deactivate," it frees up that salesforce license to be given to another

1. **How many types of email templates in salesforce?**
   1. Text
   2. HTML(Using Letterhead)
   3. Custom(Using Without Letterhead)
   4. VF Page

1. **Features of Sales Cloud?**
   1. Lead Management
   2. Activity Management
   3. Case Management
   4. ContactManagement
   5. Sales cloud Mobile App
   6. Reports and Dahsboard
   7. Business Process Automation

1. **What are types of relationships Salesforce?**
   1. Lookup
      1. Loosely Coupled
   2. Master-Detail
      1. Tightly Coupled
      2. Rollup-Summary field
      3. Cascade Security Settings
   3. Many to Many using Junction Object
      1. Include two
   4. Self Relationship
      1. Object related to self
   5. External Relationship
      1. Linked to an External Object

1. **What is Rollup Summary field?**
   1. Rollup Summary is used to display the count of child records and calculate the sum, minimum and maximum of child records.

1. **What is Audit trail ?**
   1. Audit Trail provides the information or track all the recent setup changes that an administrator done to organization. It stores the last 6 months' data.

1. **What is relationship between Opportunity and Product in Salesforce?**
   1. Opportunity is not directly related to Product
   2. Opportunity is related to Pricebook
   3. Pricebook is parent of Pricebook entry
   4. Product is related to Pricebook entry
   5. The Opportunity line item(child of Opportunity) is created from the Pricebook entries related to Pricebook Id of the Opportunity, Product is related to Pricebook entry.
   6. This way Product is related to Opportunity via OLI as a junction object.

1. **In master detail relationship, What happens when we delete the parent record? Say if we have a trigger on child record that prevents it from deleting the record, will that record be deleted? Will parent record be deleted in that case? If no, will custom validation prevent core functionality(Master-Detail in our case)?**
   1. In Master-Detail, when we delete the parent record, all child records are also deleted.
   2. No, records deleted due to cascade deletion will not execute their triggers. Instead, you will need to do that logic in the parent trigger, either by manually deleting the records, or calling the logic from the parent record (requires a trigger framework that uses a class).
   3. Core functionality will not be prevented by custom triggers

1. **Can we convert Master-Detail relationship into Lookup? Vice versa? How?**
   1. Master-detail to Lookup:
      1. It is possible
      2. We have to make sure there are no rollup summary fields on parent record
      3. We need to permanently delete the rollup summary field from SF
      4. Since, we cannot see deleted fields in SF lightning, we have to do this in classic
   2. Lookup to Master-Detail:
      1. It is possible
      2. But, we need to fill that lookup field with parent record. Only after we can convert

1. **Who is the Primary master of a Junction object? What is the OWD settings of junction object?**
   1. The one associated to the child object first, will be the primary master of the junction object.
   2. It inherits all the sharing settings from that primary Master object.
   3. When we delete the association of the primary master object, secondary becomes primary.

1. **Explain Data Security Model in Salesforce**

Data security can be achieved using three layers :

**1. Object Level Security**

This can be done by :

**-> Profiles**

- Profile gives ultimate access. So minimum access should be given via profile

- used to configure page layout assignments and Login IP restrictions

- can give following access to set of users:

1. Create (C)

2. Read (R)

3. Edit (U)

4. Delete (D)

5. View All

6. Modify All (Ultimate Access)

**-> Permission sets/Permission Set Groups**

- Primary way to assign Object and field permissions

Because :

\* They are more flexible

\* They are packagable

\* They are upgradable

- In contrast to profiles, you can add multiple permission sets to a given user.

- we can group multiple permission sets in a permission set group

**2. Field Level Security**

Can be done by:

-> Profiles

-> Permission Set

Fields can have read or write and hidden or visible permissions

**3. Record Level Security**

- Without Record level access, user can only access the record he/she owns

- record Level Security refers to as Sharing Model

- Salesforce prvides **5 ways** to share records. Access opens up as they are listed

**-> OWD**

- OWD controles how every record is accessible by users who do not own the record

- In OWD, records for any object can be set as

\* Private (Only visible to owner of the record)

\* Public Read Only (Others can only see it)

\* Public Read/Write (All have full access of records)

\* Public Read/Write/Transfer (Only available for Leads & Cases)

**-> Role Hierarchy**

- Role hierarchy defines that the person can see/edit the records for all the person below their role in the hierarchy

- For this, we need to grant Users a role and mention that role in the Role hierarchy configuration

**-> Sharing Rules**

- Owner based

\* opens access to records owned by certain users.

- Criteria Based

\* decides who should have access to the records based on certain criteria using field and values

- guest user

\* to grant record access to unauthenticated guest users.

**-> Manual Sharing**

- share record manually with other users below our role hierarchy

**-> Apex Managed Sharing**

- Shares records via apex using 'share' obect associalted with standard or custom objects

Golden Rules:

OWD and Profiles are mandatory Security settings.

Profiles generally used to give access to self-owned records, whereas OWD used to give access to all records.

It should be the combo of both to see others records

1. **What is Default OWD settings set in Salesforce?**
   1. Public Read/Write

1. **How can we identify the Primary Contact on Account?**
   1. Primary Contact functionality is generally available for Person Accounts
   2. We can create an checkbox on Contact field to mark it as Primary or setup a picklist field on Account to choose Primary Contact from.

1. **Difference Between Public Groups and Queue?**
   1. **Queues**
      1. It's a Group of users primarily used to assign as owner of records
      2. Typical use case includes a case assigned to a perticular group of service agents or lead assigned to support agents
      3. Ques can include public groups as well
      4. Queues are tied to specific objects
   2. **Group**
      1. It is a way of sharing records to a group of users who are not normally grouped together
      2. For ex, manually sharing a record based on the user's location
      3. Public groups can be used with any standard and custom objects
      4. Public groups can consist of Users, roles, roles & subordinates and other public groups

1. **What are types of Sandboxex in Salesforce?**
   1. Full copy Sandbox
      1. Full replica of prod
      2. Refresh interval: 29 days
      3. Storage same as prod
      4. Template Supported i.e. Data can be copied from production
   2. Partial Copay Sandbox
      1. Partial replica of prod
      2. Refresh interval: 5 days
      3. Data storage: 5GB
      4. File Storage: same as prod
      5. Template suported
   3. Developer Pro Sandbox
      1. Refresh Interval: 1 day
      2. Storage: 1GB
      3. No template supported
   4. Developer
      1. Refresh Interval: 200 day
      2. Storage: 1GB
      3. No template supported

1. **How is Custom setting different than custom metadata?**

|  |  |
| --- | --- |
| **Custom Metadata** | **Custom Settings** |
| stored as metadata | Stored as custom objects |
| Can be deployed | Cannot be deployed |
| Don't support relationship fields | Supports lookup fields |
| Have instance methods along with SOQL queries | Supports SOQL queries only |