

Introduction to Cloud Computing

1. What is Cloud Computing?

- With this approach everything can be done in internet (Using Application, Developing Application and distributing the hardware), no need to maintain any minimum hardware requirements and no need to install any software in the local system.
- **Cloud Computing** is an **approach** to provide the following services –
 - SAAS (Software As A Service)
 - PAAS (Platform As A Service)
 - IAAS (Infrastructure As A Service)

2. What is Salesforce?

- Salesforce is a software company which provides a web based tool called *salesforce.com*
- Salesforce by following the **Cloud Computing** approach providing **SAAS** and **PAAS**
- **SAAS:** Providing **Sales, Marketing** and **Call Center** applications as a service
- **PAAS:** Providing **Force.com** platform in which we can develop applications using Apex (Programming language similar to Core Java) and Visualforce (Markup language similar to HTML).

Production and Sandbox Environments

We should not make any new changes for the existing live application directly (Live Application will present in Production). To make the new changes we should work in test environments (sandboxes).

1. What is Production?

The environment in which end-users use the live application is called production. In production environment end-users cannot make development related changes.

2. What is the URL to access the Production Environment?

<https://www.login.salesforce.com>

3. What is Sandbox?

It is a test environment which includes a production copy. We should make all the new changes in sandbox. After doing the testing thoroughly we can move those changes into production environment.

To create the sandbox, in production we can find a link called sandboxes. By clicking on this link we can create the sandbox by choosing type of the sandbox.

4. What is the URL to access the Sandbox Environment?

test.salesforce.com

5. What are the types of Sandboxes?

- I. Developer Sandbox
- II. Developer Pro Sandbox
- III. Partial Data Sandbox
- IV. Full Copy Sandbox

6. What is Developer sandbox?

- It copy only configuration changes from the production
- It won't copy real time data
- We can test the configuration changes with sample data
- Sample data limit is 200 MB
- Refresh time interval is **once in one day**
- If we refresh the sandbox then all the sandbox contents will be replaced with production contents

7. What is Developer Pro sandbox?

- Copy configuration changes
- No real time data will be copied
- Sample data limit is 1GB
- Refresh time interval is **once in one day**

8. What is Partial Data sandbox?

- Copy configuration changes
- Copy certain amount of real time data

- Real time data limit is 5GB
- For each table it can copy maximum of 10k records
- Refresh time interval is **once in 5 days**

9. What is Full copy sandbox?

- It is the exact replica of production environment.
- Copy both configuration and entire real time data from the production.
- Refresh time interval is **once in 29 days**

Configuration Basics

Using point and click approach, we can configure the functionalities.

1. What is Track Field History?

- While creating the object, we can enable 'Track Field History'
- If we enable 'Track Field History' user can see 'Set History Tracking' button under 'Custom Fields & Relationships' section which is available on the object detail page.
- By clicking on 'Set History Tracking' button, we can enable tracking for the fields which ever you need.
- To see the object history, go to object's record layout and add *Object Name* History related list to the layout
- Whenever, user changes field value from one value to another value, it will show the history of the field in '*Object History*' related list

2. What are the Activities in Salesforce?

To create the Activities, while creating the object, we should check for 'Allow Activities' check box then user can add open Activities and Activity History related lists on the *Object* layout.

There are two types of activities:

- **Task:** Task is nothing but work assigned to a particular person, it doesn't have certain time limit.
- **Event:** It has certain time limit in that time only all persons should assemble after the time limit over, event will be completed.

Once event or task status changed to 'Completed' then we can see those records under Activity History Related List.

3. How to rename the tab?

Tab name will be decided based on the Plural Label of the custom object, to rename the tab go to corresponding object detail page and rename the plural label.

4. How to display multiple columns after clicking on the tab?

Click on the tab (Which should be related to any of the custom/standard object) > Expand Force.com Quick Access Menu > Edit Columns > Move the needed fields from Available Fields to Selected Fields. > Click on Save > User should be able to see multiple columns.

(Or)

Click on Setup > Create > Objects > Select the corresponding object link > Under Search Layouts section > Click Edit which should be left to Object Tab > Move the needed fields from Available Fields to Selected Fields. > Click on Save > User should be able to see multiple columns.

5. What is the difference between ISBLANK() AND ISNULL()?

- ISNULL() works only for number data type fields, if we don't populate with value for number fields it will return true
- ISNULL() won't be supported for TEXT data type fields because text fields never become null
- ISBLANK() supports both number as well as text data types

6. What is Dependent Picklist?

In some scenario's, we should be able to control one of the field (Dependent field) from another field (Controlling field), example If we select Country (Controlling field) as US then City (Dependent Field) should display only US cities.

- We can use checkbox data type fields also while creating dependent picklist
Note: Checkbox should be always controlling field
- We can use multi-select data type fields also while creating dependent picklist
Note: multi-select data type field should be always dependent field

7. What is the architecture of the Salesforce?

- Architecture of the Salesforce is **MVC** (Model, View, and Controller).

- View - It is the user interface (Apps, Tabs, Page Layouts, Fields and Record Types)
- Controller - Business Logic (Save, Edit, New, Cancel and Delete - upon click on these buttons Salesforce execute some logic from controller)
- Model - It is the Database which stores Records.
Note: Apps, Tabs, sObjects, fields, Apex Classes, Visualforce pages, etc... will also store in the Database in XML format.

8. What is the difference between 15 digit and 18 digit record ids in Salesforce?

- In Salesforce, whenever a user creates a record it will generate a unique record id.
- After creating the record, in the URL user can see the id of the record which is of 15 digits length
- In user interface user always see **15 digit** id which is **Case-Sensitive**
- If the user query the existing records from the database through API (Either from Query Tool or from a program), it will always return **18 digit** id which is **Case-Insensitive**
- Last 3 digits of the 18 digits represent checksum of the capitalization of 15 digit id
- Based on the *first 3 digits of the record id user can identify the type of the object.*
- All the records which belong to same object will contain same first 3 digits for the record id.

9. What is Record Type?

- For an object based on the Record Type, we can show different fields and different picklist values by assigning different page layouts for the record types and profiles.
- After creating the record type, in the record type user can see all the picklist data type fields, user can edit the picklist and decide which values should display for this particular record type

10. What is the difference between detail page and edit page?

- Whenever user try to create a new record or edit an existing record user can input the values for the fields, this page is nothing but edit page
- After creating a new record or editing an existing record, user can see the information of the record, this page is nothing but detail page

11. What is out of box functionality?

Standard features provided by Salesforce (no need to go for development).

12. What are the types of tabs?

- Custom tabs (create for objects)
- Web tabs (create to display web page based on certain URL)
- Visual force tabs (create to display the visual force page)

13. What is validation rule?

While creating or modifying the record based on the certain conditions we can display error messages on top of the page or below to the field.

14. There are two fields, if the user populate two fields with values if we combine those fields values uniqueness should be maintained, how to achieve this without coding?

Create a unique text field and update the field from workflow rule (use formula to update by combining two field values), after the update again all the system validations will be performed so error will be displayed.

15. What are Governor Limits?

Since we are working in multitenant environment Salesforce is enforcing the limits for all the functionalities.

- How many no of fields for an object: 800
- No of master detail relationships for an object: 2
- No of lookup relationship for an object: 25
- No of rollup summery fields: 25
- How many external ids we can enable for an object: 7 (increased from 3 to 7 in Winter-15)

Note: Governor Limits will be changed by Salesforce in further releases. Please refer the Salesforce documentation for the updated limits.

16. For which data types we can enable external id?

1. Text
2. Number
3. Auto number
4. Email

17. What is List View?

After clicking on the tab on the top of the page we can see views, by default we can see the value as 'All'. If we click on 'Go' button beside the view we can see all the records of that object. If you want you can create new views. While creating the view we can give the filter conditions so that based on the filter condition only we can see the records.

18. What is Inline editing?

On the detail page without clicking on edit button we can edit the fields if it is not Read-Only.

19. How to disable Inline Editing?

To enable or disable Inline editing follow the below navigation –

Setup--> Customize--> User Interface--> Enable Inline Editing

20. What is Enhanced List View?

In list views, we can modify multiple records at a time using Enhanced list views feature.

Note: To modify multiple records, all the records should belong to same record type in the list view otherwise we cannot modify.

21. What is Search Layout?

Whenever we click on a tab or we click on a lookup icon or search for a record we see only one standard field by default, to enable remaining fields we use Search Layouts.

- To show multiple fields for the records which display under a tab, go to object detail page >go to Search layouts and edit the tab and add required fields.
- To show multiple fields for the records which display when we click on lookup of a field, go to object detail page >go to Search layouts and edit Lookup Dialogs and add required fields.
- To show multiple fields for the records which display when we search for the records, go to object detail page >go to Search layouts and edit Search Results and add required fields.

22. What is mini page layout and how to enable?

For lookup fields on record detail page we see a link, whenever we put cursor on that link we see a popup window which displays few fields. To control the fields visibility in popup, on that look up field parent object page layout we see a mini page layout in that we can control the fields visibility.

23. What is Lead Process?

To control the picklist values of the **Status** field on the lead object we should create lead process.

- Without selecting the lead process we can't create the record type for lead object

24. What is Sales Process?

To control the picklist values of the **Stage** field on the opportunity object we should create sales process.

- Without selecting the sales process we can't create the record type for opportunity object

25. What is Support Process?

To control the picklist values of the **Status** field on the case object we should create support process.

- Without selecting the support process we can't create the record type for case object

26. What is web-to-lead?

On lead object we can generate the HTML code by selecting lead fields and by mentioning return URL from web-to-lead option. The generated HTML form can be hosted in any of the website. Upon populating the information in the HTML form and clicking on submit button information will be saved into lead object of the Salesforce.

Note: Salesforce Organization Id will be maintained as a hidden value in the HTML form. Based on the Organization Id data will be routed to corresponding Lead object.

27. What is Queue?

In queue we can add group of users and we can assign the objects to the Queue. After creating the queue one List view automatically created on the objects which are selected for the queue.

We can assign queue as an owner of the record (only to the assigned objects). Later users who are part of the queue can claim the ownership by navigating to list view corresponding to the queue. In the list view users who are part of the queue can select the record and click on accept button so that record ownership will be transferred from queue to accepted person.

28. What is public group?

We can add set of random users in the public group. We can't assign public group as an owner of the record.

In Manual Sharing, Sharing Rules and in list views we can access public groups.

29. What are the Assignment rules?

Only on **Lead** and **Case** objects we can create the Assignment rules. When a record is submitted for lead/case object based on the conditions in the Assignment rule it will route to corresponding user/queue.

Note: While submitting case/lead manually through user interface we should check for 'Assign using active assignment rule' checkbox which will display under Optional section.

30. What are the Auto-Response Rules?

Only on **Lead** and **Case** objects we can create the Auto-Response Rules. When a record is submitted for lead/case object based on the conditions in the Auto-Responsive rule it will respond with different email format.

31. What are the Escalation rules?

Only on the **Case** object we can create Escalation rules. Based on the customer support type and priority of the case specific time will be allotted to solve the case. If the support reps not able to solve the case in the specified time then case will be escalated and manager of the support rep will be notified with an email.

Questions on Relationships

To avoid Data Redundancy and to achieve Integrity we should go for Relationships.

1. Is it possible to create the Master-Detail Relationship field for the child object which is having existing records?

No, we cannot create directly. To create first we should create Look up relationship then populate the field value for all the records and then convert the look up relationship to master detail relationship.

2. Is it possible to convert Mater-Detail Relationship to Look-Up Relationship?

If the parent object doesn't have Roll up Summary fields related to the child object then we can convert.

3. Is it possible to delete junction-Object in case of Mater-Detail Relationship?

- If the parent objects don't have Roll up Summary fields related to the child object then we can delete

- To delete a child object it should not be referred in Apex Classes and Apex Triggers
- If we undelete the object, Master detail fields on the junction objects will be converted to look up Fields

Note:

- If we delete only Master-Detail Relationship field from the child object and undelete it then it will be converted to look up relationship
- You cannot delete Parent Object because it will be referred in the child object

4. What will happen if we undelete the deleted Junction Object?

Master-Detail Relationship data types will be converted to look up relationship data types.

5. What will happen to child records if we delete a parent record in case of Lookup Relationship?

If we delete parent object record all the child object records relationship's field value will be deleted.
(Entire record won't be deleted)

Example:

Child Object: Employee (Employee object have Department field which is related to Department Object)

Parent Object: Department

- Suppose N number of employee records related to IT department, if we delete IT department all the child (Employee) records Department field value related to IT department will be deleted

Note:

- Salesforce stores deleted records only for 15 day in Recycle bin later it will remove the records permanently
- If we undelete the IT department record from the Recycle bin then all the related child records department field value will be restored

6. What will happen to child records if we delete a parent record in case of Master Detail Relationship?

If we delete the parent object record all the related child object records will be deleted.

Example:

Child Object: Employee (Employee object have Department field which is related to Department Object)

Master Object: Department

- Suppose N number of employee records related to IT department, if we delete IT department all the child records will be deleted

Note:

- Salesforce stores deleted records only for 15 days in the Recycle bin; after that, it will remove the records permanently.
- If we undelete the IT department record from the Recycle bin, then along with the IT department record, all the related child (Employee) records will be restored. (We cannot see the child object records in the Recycle bin)

7. What is Junction Object?

A child object which is having master-detail relationships with two different parent objects is called a junction object.

Example:

Object1: Department

Object2: Project

Child Object: Employee

- Field1: Department (Master-Detail with Department)
- Field2: Project (Master-Detail with Project)

Note: From the above example, we can say Employee Object as a Junction Object.

8. For a junction object, if we delete one of the parent records, what will happen to child records?

Child records will be deleted which are related to both parent objects.

Note: If we undelete the IT department record from the Recycle bin, then along with the IT department record, all the related child (Employee) records will be restored; those will be reflected for Project as well. (We cannot see the child object records in the Recycle bin).

Users, Profiles and Permission Sets

Profiles and Permission Sets provide security for Apps, Tabs, Objects, Fields, and Record Types.

1. Is it possible to delete the user in Salesforce?

No, once we create a user in Salesforce, we cannot delete the user record. We can only deactivate the user record.

2. Why we cannot delete the user in Salesforce?

We cannot delete the user once created because if the user modifies any record in Salesforce **Created By** and **Modified By** fields will be populated with the user. If we delete the user these fields will become blank which is not acceptable by Salesforce.

3. What is 'Grant Account Login Access'? How to enable 'Grant Account Login Access'?

If we enable 'Grant Account Login Access' for a user then we can see 'Log in' button on the detail page of that user. By clicking on that 'Log in' button without giving that user's username and password we can log in.

To enable the 'Grant Account Login Access' follow the below steps -

- Log in as a user to whom you want to enable Log in access.
- At top right corner click on name (Which should be left to Setup) > My Settings
- User should be able to see user's personal set up page.
- Left side, click on Personal Information > Grant Account Login Access
- User should be able to see Grant Account Login Access page
- In Access Duration column select '1 Year' for all the records and click on 'Save' button.
- Log out and Log in as any other user in the organization then click on Manage Users > Users.
- User should be able to see list of records and verify the user to whom we enabled the Grant Account Login Access
- User should be able to see the Login link beside Edit link.
- Click on Login then user should be able to login as that user mode
- Observe at top right corner, user should be able to see **logged in as 'Name of the user'** which should be highlighted in black color.
- Click on Logout
- User should be come back to original user's mode, Observe at top right corner, user should not be able to see **Logged in as 'Name of the user'**

4. How to provide security for Apps, Tabs, Objects, Fields and Record Types?

We can provide security using –

1. Profiles
2. Permission Sets

5. What is Profile?

- Profile deals with set of permissions over -

- Apps (visible/invisible permissions can be controlled by profile)
 - Objects (Create/Read/Edit/Delete permissions)
 - Fields (Invisible/Read Only/Read-Write)
 - Record Types (Visible/Invisible)
 - System Permissions
- We can map only one profile for one user and without mapping the profile we cannot create the user.

6. What is Permission Set?

- To increase the permissions for the users over profiles we should go for Permission Sets.
- Example: To give additional permissions to few users who belongs to different profiles over Apps, Tabs, Objects and fields.
- Note: We cannot decrease the permissions over profile.

7. How to give permissions to two fields for few users belongs to the same profile?

Permission sets.

8. How many users are there in your project Salesforce instance?

1000 (It depends upon the number of licenses taken by the client, it would be up to n users license based on the client)

9. How to provide security for the Records (Instance)?

- Roles
- OWD(Organization Wide Defaults)
- Sharing Rules
- Manual Sharing
- Apex Managed Sharing
- View All
- Modify All
- View All Data
- Modify All Data

10. What is Role?

Role deals with authorization to access data.

11. What is OWD?

OWD is the default access level on records for any object in Salesforce. For custom objects we can see below access levels -

1. Private:
Only owner and above hierarchy users can have Read/Write access and below hierarchy users don't have any access.
2. Public Read only
Only owner and above hierarchy users can have Read/Write access and below hierarchy users can have only Read only access.
3. Public Read/Write
Irrespective of role hierarchy everyone can have Read/Write permissions on the records.

Note:

By default after creating a custom object OWD access level is **Public Read/Write**.

12. What is Grant Access Using Hierarchies?

Say there are three roles

- Role A
 - Role B
 - Role C

Always Role B records can be accessed by Role A (Since it is above in Role Hierarchy).

If you don't want to allow Role A to access the records of below hierarchy users then we can uncheck for a **'Grant Access Using Hierarchy'** checkbox option available in 'Security Controls' page.

Note:

For the Standard Objects we cannot uncheck this option.

Import Wizard and Data Loader

To deal with bulk records use these tools.

1. What is Import wizard?

- Import wizard is a web based tool to process bulk records.
- With import wizard we can process maximum of 50,000 records.
- In import wizard we can't see few objects (Junction Objects, Cases, Opportunities etc...)

2. What is Data Loader?

- Data Loader is a stand-alone tool to process bulk records.
- With Data loader we can process maximum of 5 million records.
- Most of the times we use only Data loader.
- Default batch size of the Data loader is 200.

3. Which operations we can perform with Data loader?

- Insert (Inserting new records, no need of ID)
- Update (Updating the existing records based on the record ID)
- Upsert (To Upsert we should have one external ID field on the object, based on the external id field if the value already exists it will update, if doesn't exist then it will insert)
- Delete (Delete the records based on the id provided, to delete we need only id, deleted records can be found in recycle bin)
- Hard delete (Delete the records based on the id provided, to delete we need only id, deleted records can't be found in recycle bin, Note: If we enable bulk API in data loader settings then only we can perform Hard delete.)
- Export (From any object we can export records based on the SOQL query, Note: We can't export deleted records which are there in the recycle bin)
- Export all (From any object we can export records based on the SOQL query, Note: Using Export all we can export deleted records which are there in the recycle bin also)

4. Data loader or Import wizard supports which file format?

.CSV (Comma Separated Values)

5. What is the field mapping file format of the data loader?

.SDL (Salesforce Data Loader)

6. How to insert null values into Data loader?

In Data loader settings we should enable 'insert null values' checkbox otherwise we can't insert null values.

7. What is external ID?

Suppose we have account table in Salesforce and account table outside of the Salesforce (Eg: .csv file, sql database table). In Salesforce all the records can be identified with record id and outside of the Salesforce we can't recognize records with Salesforce id that is the reason to compare outside table and Salesforce table, in Salesforce for one of the field we have to enable external ID.

We can enable external id for Text, Number, Auto number and Email data type fields. If we enable external id for a field we can compare that particular field with the column which is available in external table. While comparing if the both column values are having same value then it will update otherwise it will insert.

8. Maximum batch size of data loader?

Maximum Size is 10000

Minimum Size is 1

9. What is the default batch size of Apex Data Loader if we enable bulk API?

2000 records

Workflows and Approvals

To perform certain automated actions we go for Workflows and Approvals.

1. What are the different kinds of evaluation criteria's (events)?

1. Created
2. Created and every time edited to meet the criteria
3. Created and edited to subsequently meet the criteria

2. What is the difference between 'Created and every time edited to meet the criteria' and 'Created and edited to subsequently meet the criteria'?

If we select 'Created and every time edited to meet the criteria' whenever we create a record or edit a record if the criteria of the workflow rule meets then it will trigger every time. If we select 'Created and edited to subsequently meet the criteria' -

- While creating the record criteria meets so that workflow will fire and while editing the record again criteria meets workflow won't fire (meeting the criteria to meeting the criteria)
- While creating the record criteria doesn't meet so workflow won't fire and while editing the record workflow criteria meets then workflow will fire (not meeting the criteria to meeting the criteria)

Conclusion: Previous state of record should not be meeting criteria and current state of record should be meeting the criteria then only workflow rule will fire.

3. What are the types of rule criteria's?

- Criteria meet (field - operator - value, if there are multiple criteria's then in filter criteria we can give conditions like (1 or 2) and 3, field to field comparison is not possible, we can't fetch the previous information of a field)
- Formula evaluated (we can write formulas with this we can do field to field comparisons and we can fetch previous value of a field)

4. What is immediate workflow action?

The action which will be performed immediately after the record criteria meets.

5. What is time dependent workflow action?

The action which will be performed in future based on any of the date field. To create time dependent workflow action we should create one time trigger. In time trigger we can give either days or hours with the maximum of 999 value and we can select either before or after.

6. For which event we can't create time dependent workflow action?

Created and every time edited to meet the criteria.

7. What are the different kinds of workflow actions?

- New field update (we can update a field of the same object or the fields of the parent objects which are at master side in master-detail relationship, only for master-detail parent objects we can update the field and for lookup we can't update)
- New email alert (we can send emails if the criteria meets)
- New task (we can create new task)
- New outbound Message (It will send the selected fields data to a specified external system)

8. What are the types of email templates?

- Text
- HTML (with letter head)
- Custom (HTML without letter head)
- Visual Force

9. There is a time based workflow which will update one of the fields if the criteria meet. User submits the record with valid criteria, workflow triggered so that the field update is queued in the 'time based flow' queue which will fire after one day. If the user modifies the record which is submitted before the scheduled date, after modification, a record criterion is not meeting. Whether the field will be updated or not in schedule date?

It won't trigger in the schedule date because if we modify the record to not meeting criteria that queued field update will be removed from the 'time based flow' queue.

10. For the same scenario explained in the above question what happens when we deactivate or modify the criteria of the workflow to different criteria? Whether the field will be updated or not in schedule date?

Yes, it will trigger in scheduled date.

11. Scenario: There are two workflow rules on the same object say namely wf1 and wf2. If wf1 fires then a field will be updated on the same object, if the field updated and due to this wf2 criteria meets then what will happen, wf2 will fire or not?

It won't fire. To fire wf2 we should enable 'Re-evaluate Workflow Rules' checkbox of the field update which is there in wf1.

12. What is recursive workflow rule? How to avoid recursive workflow rules?

Whenever we enable **Re-evaluate Workflow Rules after Field Change** checkbox in the **Field Update** of a workflow rule, due to this field update other workflow rules on the same object will be fired if the entry criteria of those workflow rules satisfied.

In case, in other workflow rules also if we enable **Re-evaluate Workflow Rules after Field Change** checkbox in the **Field Update** recursive workflow rules will come in some scenarios.

We can take two steps to avoid recursive workflow rules –

- For the workflow **Evaluation Criteria** if you choose **created, and any time it's edited to subsequently meet criteria** option, we can avoid recursive workflow rules.
- If you don't enable **Re-evaluate Workflow Rules after Field Change** checkbox in the **Field Update** of a workflow rule we can avoid.

13. What is Approval Process?

If the criteria of the record meets then by clicking on submit for Approval button user can submit the record for approval

Note: Approval history related list should be displayed on the record detail page

Example: A Sales Rep is working on an opportunity. If the customer asked for more discount for which sales rep need approval from his manager then approval process can be configured to achieve this scenario.

14. How to configure Approval Process?

- Before creating the Approval Process we should select the object after that we should follow below steps -
- Give the Approval Process name
- Give the criteria of the Approval Process
- Select the email template (If we don't select any email template Salesforce by default send an email notification to the target approver else with our selected email template target approver will be notified)
- Select the users who can submit for the approval (If we do not select any user by default all the users who can access to that record can submit)
- Select the user to whom record should be submitted
- Initial submission actions (after submitting the record for approval immediately whatever the actions included in the initial submission actions section will be triggered)

- Approval Steps (we can add multiple steps)
- For each and every step we can see 'Approval actions' and 'rejection actions' sections where we can add actions to be performed
- If the Approver approves the record then actions which are under 'approval actions' section will be triggered
- Final approval actions section (If all the steps approved then actions which are under 'final approval actions' section will be triggered)
- Final rejection actions section (If any one of the step rejected then actions which are under 'final rejection actions' section will be triggered)
- Recall approval actions (After submitting record for approval if you want to revoke we click on recall approval action on the detail page, after clicking on that button actions which are under recall approval actions section will be triggered)

15. Scenario: After activating the approval process, I want to add one more step. Is it possible?

It's not possible, to add one more step deactivate the approval process and clone the deactivated approval process and add the new steps.

Reports and Dashboards

Reports will summarize the information out of million records in the database and Dashboards will display the information in graphical representation.

1. What is Report?

To summarize the information of an object we use reports.

2. What are the types of Reports?

- Tabular (Displays records just like a table)
- Summary (we can summarize the information based on certain fields)
- Matrix (we can summarize the information in two dimensional manner, both rows and columns)
- Join (we can summarize information in different blocks on the same object and the related objects)

3. How many blocks we can create for join reports?

5 blocks.

4. How many maximum groupings we can do for summary, matrix and join reports?

3 groupings

5. What is bucketing in reports?

Bucket field in Reports is used to group values to the name we specify.

[See in detail here](#)

6. How many records we can display on page for a report?

We can display up to **2000 records** on a page, if more records are there to display we cannot see those through user interface. If you export the records to a excel sheet then you can export up to to**50000 records**.

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