

SCHOOL OF MECHANICAL ENGINEERING
CONTINUOUS ASSESSMENT TEST -I
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Programme Name & Branch : B.Tech & Mechanical Engineering
Course Code : BMEE355L
Course Name : Cloud Computing Using Salesforce
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Q1.	What is Customer Relationship Management (CRM)? What are the key features of the Salesforce Platform?
Ans	Salesforce CRM (Customer Relationship Management) involves all interactions with an organization's constituents. This includes Prospecting, • The sales process, • Retention, • Marketing efforts, and • Customer service. Salesforce is a CRM. It stores your customer data, gives you processes for nurturing potential customers, and provides ways to collaborate with those you work with. Salesforce has a lot of standard functionality or out-of-the-box products and features that you can use to run your business. Key points about Salesforce: • Salesforce is a cloud company. It lives in the reliable, multi-tenant cloud. • The Salesforce platform is powered by metadata and comprises different parts like data services, artificial intelligence, and robust APIs for development. • All of its apps sit on top of the platform. Its prebuilt offerings like Sales Cloud and Marketing Cloud Engagement and apps you build using the platform have consistent, powerful functionality. • Everything is integrated. Platform technologies like predictive analytics and development frameworks are built into the offering and the work you build. • The Salesforce Multitenant Cloud offers a core set of services to all customers. So, no matter the size of your business, you get access to the same computing power, data storage, and key features. • In Salesforce, metadata encompasses the configurations, layouts, and settings that define how the platform behaves. The blueprint captures how objects relate, which fields are present on a layout, or the criteria for a specific automation. • API stands for Application Programming Interface, and it's simply another way of sending commands to Salesforce, only this time there's no graphical UI to work through, instead, developers use the APIs to send commands like View or Save to Salesforce programmatically by writing platform code.

Q2.	What are the benefits of the following? A. Exchange Rate using Advanced Currency Management (ACM). B. The usage of List View and Chatter Group
Ans	A) Advanced Currency Management is a feature in Salesforce that allows you to manage and track currency exchange rates at different points in time. This is particularly useful for organizations that need to report financial data in historical terms or that deal with frequent fluctuations in exchange rates. Updating exchange rates with Advanced Currency Management (ACM) in Salesforce involves enabling ACM, configuring exchange rates with historical data, and ensuring that the rates are correctly applied to transactions and reports. ACM provides a more detailed and flexible approach to currency management, which is essential for accurate financial reporting and forecasting in organizations dealing with multiple currencies and frequent rate changes. Key Features of ACM: Historical Exchange Rates: ACM allows you to set different exchange rates for different periods, so you can track how exchange rates change over time. Currency Management: Manage multiple currencies and their exchange rates more effectively, particularly for reporting and Forecasting. Customizable Reporting: Provides better support for financial reporting by using historical exchange rates for past Transactions. B) Salesforce Chatter is a collaboration and communication tool integrated within the Salesforce platform. It allows users to share information, collaborate on projects, and engage in discussions directly within Salesforce, making it easier to work together and stay connected with relevant data and tasks. Benefits of Salesforce Chatter: Enhanced Collaboration: Chatter facilitates real-time communication and collaboration among team members, improving teamwork and productivity. Contextual Discussions: By integrating with Salesforce records, Chatter ensures that discussions and updates are contextually relevant to the data being worked on. Increased Visibility: Chatter helps in keeping all team members informed about important updates, changes, and activities, ensuring everyone stays aligned. Streamlined Workflows: The ability to comment on records, share files, and create tasks

	within Chatter helps streamline workflows and reduce the need for external communication tools. Centralized Information: Chatter provides a centralized location for collaboration and communication, reducing the need for disparate tools and simplifying information management. Streamlined Workflows: The ability to comment on records, share files, and create tasks within Chatter helps streamline workflows and reduce the need for external communication tools. Centralized Information: Chatter provides a centralized location for collaboration and communication, reducing the need for disparate tools and simplifying information management.
Q3.	Discuss a standard object and a custom object with examples. How do you identify a custom object? Elaborate the steps for creating an object and use it inside an application. In Salesforce, databases use objects to store data. Each object comprises a number of fields which corresponds to column in a database. Data is Stored in records of objects which correspond to rows in a database. Objects can be related to other objects using relationship fields. There are 2 types of objects: Standard Objects: These are the objects which already exist in the Salesforce platform to manage the configurations and settings of the environment. Ex: Accounts, Leads and opportunities. Custom Objects: The organization's data will always not fit into the existing standard objects. So we can extend and customize many salesforce objects to meet this need. The custom objects can also have custom fields along with the standard fields available in Salesforce. Custom objects extend the functionality that standard objects provide. For example, a courier company can create a custom object to store the schedule and dispatch details for every week. So these objects store the data that is unique to the business. To create a custom object : Step 1. Login to Salesforce account, and in Salesforce org, go to "Setup" Step 2: On the "Object Manager" page, select the "Create" drop-down button and then select "Custom Object".

	Step 3: In the “ New Custom Object” page fill in the details like Label, Object Name information etc. Step 4: There are some optional features while creating objects: ● Allow Reports: If you tick this checkbox, then only these objects will be available to make Salesforce reports. ● Allow Activities: If you tick this checkbox, you can make activities on this object. ● Track Field History: When you tick this checkbox, you will be able to merely track the fields. Step 5: After completing all these settings, press the Save button. If you choose not to select “Launch new custom tab wizard” on the object creation page, the object will be saved without a corresponding tab. In such cases, you will need to manually create a tab for this object. Conversely, if you do select “Launch new custom tab wizard” on the object creation page, the object will be saved, and a tab will be automatically created, making it visible to you.
Q4.	Discuss different data security measures and their level inside Salesforce.
Ans	Data Security in Salesforce is a comprehensive framework designed to ensure that sensitive information is protected from unauthorized access and that users can only interact with data that is relevant to their role. It involves multiple layers of security controls to manage and restrict access to data. Here’s a detailed explanation of each aspect: 1. Overview of Data Security Data security in Salesforce involves multiple levels of protection to secure data from unauthorised access and ensure that only the right users have the appropriate access. The approach is layered and includes organizational-level controls, object-level permissions, field-level security, and record-level sharing. This multi-layered approach ensures that sensitive data is well-protected across various dimensions

	of the Salesforce platform. 2. Control Access to the Org Controlling access to the organization involves managing how users log into Salesforce and the security measures applied during the login Process: 3. Control Access to Objects Controlling access to objects ensures that users can only interact with the objects that are necessary for their roles 4. Control Access to Fields Controlling access to fields helps protect sensitive data within objects by managing which fields users can view or edit 5. Control Access to Records Controlling access to records ensures that users can only access records that they are authorized to view or modify 6. Create a Role Hierarchy Creating a role hierarchy defines the reporting structure within an organization and controls record access based on user roles 7. Define Sharing Rules Defining sharing rules allows for customized record access based on specific criteria or ownership, beyond the default access levels
Q5.	What's the Difference Between Profiles, Permission Sets and Roles? What is the need for permission-set groups, and how does it help to manage the users.
Ans	Permission Set Groups in Salesforce are a feature designed to simplify the management of permissions across multiple users by allowing administrators to bundle multiple permission sets into a single group. This grouping mechanism helps streamline the assignment of permissions and provides more flexible and manageable access control. Permission Set Groups are introduced to address the complexity of managing multiple permission sets for users. Instead of assigning each permission set individually, administrators can group them together to make it easier to manage and assign permissions. This is particularly useful in organizations where users need a combination of permissions to perform their roles effectively. Key Features of Permission Set Groups: 1. Simplified Permission Management Bundling: Combine multiple permission sets into a single group, which can then be assigned to users. This makes it easier to manage and track permissions. Efficiency: Reduces the number of individual assignments needed, simplifying user management and reducing the risk of errors. 2. Flexible Assignments: Granular Control: Administrators can create specific groups tailored to different roles or job functions, providing tailored access based on user needs.

	Easy Updates: When changes are made to the permissions within a group, those changes are automatically applied to all users assigned to the group. 3. Muting Permissions: Selective Activation: Ability to mute or deactivate specific permissions within a group without removing them entirely. This allows for nuanced control over what permissions are active for different users or scenarios. 4. Role-Based Management: Role Alignment: Align permission sets with organizational roles, making it easier to manage access based on job functions or departments.
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