

Prepare for your Platform App Builder Certification Exam CRT-403

Course Summary

Description

Are you ready to take the next jump in your career by becoming a Salesforce.com Certified App Builder? If so, join us for this one-day training course covering content and techniques designed around the exam objectives. Through guided scenarios, lecture, and discussion, you will hone your knowledge of Salesforce application design and declarative production topics.

Objectives

At the end of this course, students will be able to:

- Architect and manage the correct data model based on business requirements.
- Configure application security.
- Define business logic and process automation declaratively.
- Design user interfaces.
- Customize applications for mobile use and Lightning.
- Deploy applications.

Topics

- Salesforce Fundamentals
- Security
- Data Modeling and Management
- Reporting
- User Interface
- Mobile
- Business Logic and Process Automation
- App Deployment
- Wrapping Up

Audience

Certification Preparation for Platform App Builder is ideal for administrators, system integrators, and independent software vendors (ISVs) with an interest in sharpening the development, deployment, and administrative skills required to succeed in becoming a Salesforce Certified Platform App Builder.

Prerequisites

To be successful in this class, you should have six or more months of experience building applications on Salesforce or a similar platform. You should also have proven experience administering and configuring a Salesforce organization, as demonstrated through the successful completion of Salesforce.com Certified Administrator exam.

Duration

One day

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Course Outline

- I. *Salesforce Fundamentals*
 - A. Capabilities of core CRM objects
 - B. Boundaries of declarative customizations
 - C. Use cases for programmatic customizations
- II. *Security*
 - A. Restricting and extending object, record, and field access
 - B. Determining appropriate sharing solutions
- III. *Data Modeling and Management*
 - A. Determining an appropriate data model
 - B. Relationship types and impact on record access, user interface, and reporting
 - C. Considerations for changing field types
 - D. Considerations of the schema builder
 - E. Considerations for importing and exporting data
 - F. Use cases of external objects
- IV. *Reporting*
 - A. Creating reports
 - B. Report types
 - C. Dashboards
- V. *User Interface*
 - A. Customization options
 - B. Customer buttons, links, and actions
 - C. Declarative options for incorporating Lightning Components
- VI. *Mobile*

Declarative customizations available for the Salesforce1 user interface
- VII. *Business Logic and Process Automation*
 - A. Record types
 - B. Formula fields
 - C. Roll-up summary fields
 - D. Validation rules
 - E. Approval processes
 - F. Workflow
 - G. Visual workflow
 - H. Process builder
 - I. Automating business processes
 - J. Ramifications of field updates and potential for recursion
- VIII. *App Deployment*
 - A. Application lifecycle
 - B. Sandboxes
 - C. Change sets
 - D. Unmanaged and managed packages
 - E. Determining an appropriate deployment plan
- IX. *Wrapping Up*
 - A. Test preparation
 - B. Practice exam