

DECLARATIVE DEVELOPMENT FOR PLATFORM APP BUILDER

COURSE OVERVIEW

Platform App Builder is course beyond Salesforce administration to unlock even greater capabilities through declarative programming? Master Salesforce's suite of click-not-code options for developing valuable apps and functionality over five days of guided scenarios, lectures, and discussion. Build your knowledge of app deployment, automation tools, security, UI customization, and more!

WHO IS THIS FOR?

Platform App Builders Course is ideal for administrators, and System integrators, with an interest in honing their app development, deployment, and advanced Salesforce administration skills

Topics, Modules, and Trailmix

The Platform App Builders course content is all online and available via our

Trailhead platform.

Trailhead is the path into the Salesforce economy. It's the fun way to learn the skills needed to earn credentials that grow careers, and connect with a global movement of Trailblazers to continue learning together. This is where the Salesforce Fundamentals course content lives. Trailhead is an online platform where students can Learn at their own pace with guided learning paths, collect badges, and score points – getting rewarded for and prove the skills you learn. If you haven't experienced Trailhead before, stop and go try a module! We recommend something

like, Salesforce User Basics, CRM Basics, Accounts & Contacts and Leads & Opportunities.

Try these modules on Trailhead:

[Salesforce User Basics](#) 1 hr 5 mins

Get started with Salesforce and learn how to make it work for your bottom line.

- Welcome to Salesforce ~ 20 mins
- Get Started with Salesforce ~ 25 mins
- Work with Your Salesforce Admin ~ 20 mins

[Salesforce Platform: Quick Look](#)

Build intelligent experiences for your customers with the Salesforce Platform

- Understand the Platform Architecture ~ 15 mins

[CRM for Lightning Experience](#) 40 mins

Get started with Salesforce CRM and explore Lightning Experience.

- Get Started with Salesforce CRM ~ 25 mins
- Navigate Setup ~ 15 mins

[Accounts & Contacts for Lightning Experience](#)

Discover how accounts and contacts work together in Salesforce

- Get Started with Accounts and Contacts ~ 20 mins
- Understand Account and Contact Relationships ~ 15 mins

Leads & Opportunities for Lightning Experience 30 mins

Learn how you can power your sales process with leads and opportunities in Salesforce.

- Create a Sales Process and Use Opportunities ~ 15 mins
- Convert and Assign Leads ~ 15 mins

Please take your time to complete these modules in Trailhead before you start the course.

We've put together a [trailmix](#), or a collection of units, for you to follow. Trailmix is a way to create a custom set of topics and modules for your specific courses, a group of students, or special projects.

In the recommended Trailmix, we've put these modules in an order that we think best represents the learning path and covers what is needed for the Salesforce Fundamentals credential. However, you should feel free to add additional modules or projects to further learning or extend the topics that you wish to cover by creating your own! To use the content we've laid out, check out this Trailmix with all of the modules: [Salesforce Admin Trailmix](#).

Course Outline

Module 1

[Trailhead Playground Management](#) (20 minutes) 700 Points

Create hands-on orgs, practice your Salesforce skills, and complete Trailhead challenges

- Create a Trailhead Playground ~ 5 mins
- Get Your Trailhead Playground Username and Password ~ 5 mins
- Install Apps and Packages in Your Trailhead Playground ~ 10 mins

Module 2

[User Management](#) (50 mins) 200 Points

Set up users and control how they can view or edit your business data.

- Add New Users ~ 20 mins
- Control What Your Users Can Access ~ 30 mins

Module 3

[Data Modelling](#) (45 mins) 1500 Points

Give your data structure with objects, fields, and relationships.

- Understand Custom & Standard Objects ~ 15 mins
- Create Object Relationships ~ 15 mins
- Work with Schema Builder ~ 15 mins

Module 4

[Data Quality](#) (60M) – 700 Points

Discover strategies for assessing and improving the quality of your data in Salesforce

- Get Started with Data Quality ~ 20 mins
- Assess the Quality of Data ~ 20 mins

- Improve Data Quality ~ 20 mins

Module 5

[Data Management](#) (40 mins) 600 Points

Learn how to import and export data in Salesforce.

- Import Data ~ 30 mins
- Export Data ~ 10 mins

Module 6

[Formulas and Validation](#) (45 Min) – 1500 Points

Tailor your apps without writing code by using point-and-click logic

- Use Formula Fields ~ 15 mins
- Implement Roll-Up Summary Fields ~ 15 mins
- Create Validation Rules ~ 15 mins

Module 7

[Data Security](#) (1 hr 50 mins) 3100 Points

Control access to data using point-and-click security tools.

- Overview of Data Security ~ 10 mins
- Control Access to the Org ~ 15 mins
- Control Access to Objects ~ 25 mins
- Control Access to Fields ~ 15 mins
- Control Access to Records ~ 15 mins
- Create a Role Hierarchy ~ 15 mins
- Define Sharing Rules ~ 15 mins

Module 8

[Lightning Experience Customization](#) (2 hrs 45 mins) 3100 Points

Customize the Lightning Experience user interface without writing any code.

- Set Up Your Org ~ 30 mins
- Create and Customize Lightning Apps ~ 20 mins
- Create and Customize List Views ~ 20 mins
- Customize Record Highlights with Compact Layouts ~ 20 mins
- Customize Record Details with Page Layouts ~ 30 mins
- Customize Lightning Experience with Buttons, and Links ~ 15 mins
- Empower Your Users with Quick Actions ~ 30 mins

Module 9

[Lightning App Builder](#) (2 H 15M) 2050 Points

Build custom pages for Lightning Experience and the Salesforce mobile app quickly with point-and-click tools.

- Get Started with the Lightning App Builder ~15 mins
- Build a Custom Home Page for Lightning Experience ~20 mins
- Build a Custom Record Page for Lightning Experience ~20 mins
- Build an App Home Lightning Page ~20 mins
- Work with Custom Lightning Components ~20 mins

Module 10

[Lightning Flow](#) (2H 5Min) – 1700 Points

Automate processes for every app, experience, and portal with declarative tools.

- Choose the Right Automation Tool ~ 10 mins
- Automate Simple Business Processes with Process Builder ~ 30 mins

- Guide Users Through Your Business Processes with Flow Builder ~ 30 mins
- Combine the Power of Process Builder and Flow Builder ~ 25 mins
- Customize How Records Get Approved with Approvals ~ 30 mins

Module 11

[Chatter Administration for Lightning Experience](#) (1H 20 mins) – 675 Points

Get started with Chatter administration in Lightning Experience.

- Get Started with Chatter ~20 mins
- Enable Feed Tracking ~15 mins
- Approve Records from a Chatter Feed ~25 mins
- Develop a Rollout Strategy ~10 mins

Project

[Customize an Org to Support a New Business Unit](#) (1 hr 10 mins) 500

Points

Manage users and optimize your business model for efficiency.

- Manage User Access ~ 15 mins
- Manage Chatter ~ 10 mins
- Modify Your Data Model ~ 15 mins
- Configure an Email Letterhead and Template ~ 15 mins
- Automate Your Business Process ~ 15 mins

Module 12

[Reports & Dashboards for Lightning Experience](#) (2 hrs 15 mins) 2100 Points

Visualize key business metrics in real-time using Lightning Experience.

- Introduction to Reports and Dashboards in Lightning Experience ~ 15 mins
- Create Reports with the Report Builder ~ 25 mins

- Format Reports ~ 40 mins
- Visualize Your Data with the Lightning Dashboard Builder ~ 35 mins
- Extend Your Reporting Strategy with AppExchange ~ 20 mins

Project

[Create Reports and Dashboards for Sales and Marketing Managers](#)

1hr 30 mins 700 Points

Track key business information for your stakeholders with reports and dashboards.

- Run and Modify a Report ~ 15 mins
- Create a Simple Custom Report ~ 10 mins
- Filter Your Reports ~ 15 mins
- Group and Categorize Your Data ~ 15 mins
- Use Summary Formulas in Your Reports ~ 10 mins
- Visualize Your Data ~ 15 mins
- Manage Reported Data ~ 10 mins

Module 13

[Lightning Apps \(1 H\) 200 Points](#)

Learn about Lightning apps, create one, and upgrade a Classic app to Lightning.

- Get Started With Lightning Apps ~20 mins
- Create a Lightning App ~ 20 mins
- Upgrade a Classic App to a Lightning App ~20 mins