

# DECLARATIVE DEVELOPMENT FOR PLATFORM APP BUILDERS



## OVERVIEW

Are you ready to move 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 SHOULD TAKE THIS COURSE?

Declarative Development for Platform App Builders is ideal for administrators, system integrators, and independent software vendors (ISVs) with an interest in honing their app development, deployment, and advanced Salesforce administration skills.

## WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Design 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.

## PREREQUISITES

The following experience and credentials are required for successfully mastering all skills discussed in this course:

- At least six months of proven experience administering a Salesforce organization, as demonstrated through the successful completion of the Salesforce Certified Administrator exam.
- At least six months building custom elements in Salesforce, such as page layouts, fields, workflows, and processes.

## DURATION

- 5 days

## DELIVERY FORMAT

- Classroom
- Virtual Classroom

## AUDIENCE

Experienced Salesforce Administrators

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## MODULES & TOPICS

### Building Your Data Model Declaratively

- Capabilities of Core CRM Objects
- Boundaries of Declarative Customizations
- Use Cases for Programmatic Customizations
- Determining an Appropriate Data Model
- Relationship Types and Impact on Record Access, User Interface, and Reporting
- Considerations for Changing Field Types
- Considerations of the Schema Builder
- Considerations for Importing and Exporting Data
- Use Cases of External Objects

### Crafting Your User Interface

- Customization Options
- Custom Buttons, Links, and Actions
- List Views
- Record Types
- Social Features
- UI Design Best Practices

### Constructing Business Logic

- Formula Fields
- Roll-up Summary Fields
- Validation Rules

### Maintaining Record and Data Security

- Restricting and Extending Object, Record, and Field Access
- Determining Appropriate Sharing Solutions

### Automating Business Processes

- Lightning Process Builder
- Workflows and Approvals
- Automating Business Processes
- Ramifications of Field Updates and Potential for Recursion

### Deploying Your App

- Application Lifecycle
- Sandboxes
- Change Sets
- Unmanaged and Managed Packages
- Determining an Appropriate Deployment Plan

### Designing Advanced User Interface Components

- Creating Reports
- Report Types
- Dashboards
- Declarative Options for Incorporating Lightning Components
- Declarative Customizations Available for the Salesforce1 User Interface

### Deciding When Declarative Isn't Enough

- Limits of Declarative Tools
- Programmatic Use-cases
- AppExchange Apps

## ABOUT SALESFORCE UNIVERSITY

Salesforce University offers a comprehensive catalog of courses and certifications to help you administer, develop, and use your organization's Salesforce environment. Whether you need a customized private course for your whole team or an in-depth instructor-led classroom experience for one person, Salesforce University can help you take the next steps on your journey to success. Contact us today to learn how we can help you get the most out of your Salesforce investment.

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