

Tutorial Hell

I was stuck in Tutorial Hell.

Keeping current on the latest tools, staying updated with several yearly updates, and preparing for certifications didn't leave a lot of time for hands-on learning with the Salesforce platform.

I attained the Platform App Builder certification and attempted the Salesforce Administrator certification a few times but always was just a few questions away from passing. After earning the Agentforce Innovator badge on Trailhead, I finally had to ask the question.

When and how am I going to use this?

The Turnaround

In theory, (to me at least) every application has a core function. There are plenty of "bells and whistles" like Flows, List Views, formulas, functions, and several different rules, but ultimately every application serves a single primary function with many options and customizations.

At that point I decided to stop focusing on the bells and whistles. I dropped my next certification attempt and cleared the practice orgs on my Trailhead profile. I committed myself to building the most simple, functional core of an application possible using declarative development practices only. The bells and whistles could be added over time with future iterations.

I just needed a place to start.

Beginning to build the idea.

With my employment history, I've worked with a multitude of different CRM's. This seemed like the best application to build as I'm already familiar with the basics of what a CRM needs to be functional.

Through my exposure to the Salesforce platform, I understood the synergy between profiles, picklists, and record types. So, I knew I had a "skeletal framework" to build around.

My first thought before starting was to secure the org. After completing a couple of Superbadges from the Security Specialist Superbadges unit and

learning how to set password security, login push notifications, and multi-factor authentication I moved on to the actual build.

Moving forward

What follows will be articles discussing different phases of the development process for a functional CRM that can be used for a small business.

Future articles will cover iterations on the overall build.

One of the ideas I have planned is to set up Agentforce so a customer could have access to service from a website where they can get questions answered, and timelines verified.

Feel free to reach out for any questions.

I haven't quite figured out how to work with the org metadata (yet) but be sure to check the GitHub repository for further documentation until then.