

Study for the Platform App Builder Exam

Platform App Builder Certification Prep: Data Modeling and App Deployment

Unit 1: Study Up on Data Modeling and Management

Learning Objectives

After completing this unit, you'll be able to:

- Determine the appropriate data model for various use cases.
- Describe the capabilities of the various relationship types and the implications of each on record access, user interface, and reporting.
- Identify the considerations when selecting or changing a field's data type.
- Describe the capabilities and considerations of the schema builder.
- Determine the options and considerations when importing and exporting data, including the capabilities of external data sources.

Key Topics


This unit prepares you for the Data Modeling and Management section of the Salesforce Platform App Builder exam, which makes up 22% of the overall exam. This section of the exam tests these topics.

- Capabilities of core CRM objects
- Determining an appropriate data model
- Relationship types and impact on record access, user interface, and reporting
- Considerations for changing field types
- Considerations of Schema Builder functionality
- Considerations for importing and exporting data
- Use cases of external objects

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you'll encounter as a Salesforce Platform App Builder. Looking at these scenarios helps prepare you to take the Data Modeling and Management section of the Salesforce Platform App Builder exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

Exam Practice Questions

Ready to jump in? The sample tool below is not scored—it's just an easy way to quiz yourself. To use it, read the scenario, then click the answer you think is correct. Some questions may have more than one

correct answer. Click **Submit** to learn whether the answer you chose is correct or incorrect, and why. If there's a longer explanation, click  to expand the window, then click anywhere in the window to close it. When you reach the end, you can review the answers or retake the questions.

Interactive Questions

Question 1

An App Builder for Universal Containers wants to change a field type that is currently used as an external ID. What field type can the field be changed to without potentially losing data?

| | | |
|---|------------------|--|
| A | Text Area (LONG) | Incorrect. Choosing a data type other than text, number, or email causes the field to no longer act as an external ID. |
| B | Text | Correct. Choosing a data type other than text, number, or email causes the field to no longer act as an external ID. |
| C | Text Area (RICH) | Incorrect. Choosing a data type other than text, number, or email causes the field to no longer act as an external ID. |
| D | URL | Incorrect. Choosing a data type other than text, number, or email causes the field to no longer act as an external ID. |

Question 2

The App Builder at Universal Containers is creating a new tool to track bugs with cases. Since there can be many bugs associated with a case and many cases can be associated with a bug, what can the App Builder do to meet this business requirement?

| | | |
|---|--|--|
| A | Create a custom bug object and create a custom field with the field type master-detail looking to the case object. | Incorrect. This setup would only allow a single case to be associated with a bug but allow many bugs to be associated with a case. This would not meet the business requirement. To create many-to-many relationships, a junction object would need to be created and associated with both Case and Bug objects. |
| B | Create a lookup relationship on the Case object to Bug object. | Incorrect. A lookup relationship allows the user to only select a single record instead of associating many records. This would not meet the business requirement. To create many-to-many relationships, a junction object would need to be created and associated with both Case and Bug objects. |
| C | Create custom fields on Case object to capture bug information. | Incorrect. This would not meet the business requirement. To create many-to-many relationships, a junction object would need to be created and associated with both Case and Bug objects. |
| D | Create a junction object and establish many-to-many relationships between Case and a custom Bug object. | Correct. To create many-to-many relationships, a junction object would need to be created and associated with both Case and Bug objects. |

Question 3

Universal Containers is importing 1,000 records into Salesforce. The team wants to avoid creating duplicate records during the import. How can these requirements be met?

| | | |
|---|--|--|
| A | Include a column in the import file that has either record names, Salesforce ids, or external ids that can be used to match records. | Correct. These are required fields in the import file. |
| B | When importing the file, select the prevent duplicates option on the last step of the import wizard and import the file. | Incorrect. Without a key identifier, duplicates will still be created. |
| C | After importing all of the custom objects, run a duplicate check report, export the report to a CSV file, and run a mass delete to purge any duplicates. | Incorrect. This would not prevent duplicates. |
| D | After importing all of the custom objects, review all records created and manually merge or delete any duplicate records. | Incorrect. This would not prevent duplicates. |

Did you get a scenario wrong? Check out the table for related study material.

| | |
|------------|--|
| Question 1 | Review Notes on Changing Custom Field Types to learn what field types you can change to without potentially losing data. |
| Question 2 | Refresh your knowledge on the different object relationships by reviewing Object Relationship Overview . |
| Question 3 | Learn how to avoid duplicate records during data import by reading up on Import Data Into Salesforce . |

Exam Topic Flashcards

The following flashcards cover changing field types, considerations of Schema Builder functionality, and data modeling. Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam.

Read the question or term on each card, then click or tap the card to reveal the correct answer. Click the right-facing arrow to move to the next card and the left-facing arrow to return to the previous card.

Interactive Flashcards

Card 1

| | |
|--|--------|
| Maximum number of records that an App Builder can import at a time with Data Import Wizard | 50,000 |
|--|--------|

Card 2

| | |
|--|--|
| What are the types of lookup relationships available for external objects? | <ul style="list-style-type: none"> • Lookup Relationships • External Lookup Relationship • Indirect Lookup Relationship |
|--|--|

Card 3

| | |
|---|--|
| What can an App Builder create with Schema Builder? | <ul style="list-style-type: none"> • Custom Objects • Lookup Relationships • Master-detail relationships • All Custom Fields except: Geolocation |
|---|--|

Card 4

| | |
|--|--|
| What are two capabilities of Schema Builder? | <ul style="list-style-type: none"> • Modify custom field help text on standard objects • Create lookup or master-detail object relationships |
|--|--|

Card 5







| | |
|---|--|
| What happens to a junction object record when either associated master record is deleted? | The record is deleted and placed in the recycle bin. |
|---|--|

Did you get a flashcard wrong? Check out the table for related study material.

| | |
|-------------|---|
| Flashcard 1 | Review Import Data Into Salesforce to learn more about limits and considerations when importing and exporting data. |
| Flashcard 2 | Refresh your knowledge on External Object Relationships to know the two types of lookup relationships available for external objects. |
| Flashcard 3 | Study Design Your Own Data Model to describe the capabilities of creating with Schema Builder. |
| Flashcard 4 | Identify the capabilities of Schema Builder by studying How Do I Access Schema Builder . |
| Flashcard 5 | Learn about the various relationship types and implications on record access by reviewing Considerations for Relationships . |

Related Badges

Looking for more information? Explore these related badges.

| Badge | Content Type |
|---|--------------|
|  Leads and Opportunities for Lightning Experience | Module |
|  Data Modeling | Module |
|  Data Management | Module |
|  Picklist Administration | Module |
|  Duplication Management | Module |
|  Import and Export with Data Management Tools | Project |

You've reviewed the Data Modeling and Management section of the exam. Next, let's take a look at the Business Logic and Process Automation section.

Unit 2: Refresh on Business Logic and Process Automation

Learning Objectives

After completing this unit, you'll be able to:

- Describe the capabilities of and use cases for record types.
- Demonstrate the use of formula fields to meet stated business requirements.
- Determine the capabilities, use cases, and implications of roll-up summary fields.
- Demonstrate the use of validation rules to meet stated business requirements.
- Determine the capabilities and use cases for approval processes.
- Determine the capabilities and use cases for workflow, Flow, and Process Builder.
- Recommend a solution to automate business processes while avoiding errors in automation.


Key Topics

This unit prepares you for the Business Logic and Process Automation section of the Salesforce Platform App Builder exam, which makes up 28% of the overall exam. This section of the exam tests these topics.

- Formula fields use cases
- Roll-up summary fields capabilities
- Validation rules
- Approval processes
- Workflow, Flow, and Process Builder
- Avoiding errors in automation

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you'll encounter as a Salesforce Platform App Builder. Looking at these scenarios helps prepare you to take the Business Logic and Process Automation section of the Salesforce Platform App Builder exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

Exam Practice Questions

Ready to jump in? The sample tool below is not scored—it's just an easy way to quiz yourself. To use it, read the scenario, then click on the answer you think is correct. Some questions may have more than one correct answer. Click **Submit** to learn whether the answer you chose is correct or incorrect, and why. If there's a longer explanation, click  to expand the window, then click anywhere in the window to close it. When you reach the end, you can review the answers or retake the questions.

Interactive Questions

Question 1

A sales representative at Universal Containers is the delegated approver for their manager's approval requests. The sales representative wants to be able to respond to approval requests through email. What permission do they need to meet this requirement?

| | | |
|---|--|--|
| A | The user needs API Enabled permission on their profile or assigned permission set. | Correct. The API Enabled permission can be enabled on the profile or the permission set assigned to the user. |
| B | The user needs System Administrator profile assigned. | Incorrect. This would give more access than the user needs. To respond to an approval request through email, the user will need API Enabled permission on their profile or assigned permission set. |
| C | The user needs Email Enabled Approvals permission on their profile or assigned permission set. | Incorrect. There is no such permission as Email Enabled Approvals. To respond to an approval request through email, the user needs API Enabled permission on their profile or assigned permission set. |
| D | The user needs Approvals for Email permission on their profile or assigned permission set. | Incorrect. There is no such permission as Approvals for Email. To respond to an approval request through email, the user needs API Enabled permission on their profile or assigned permission set. |

Question 2

Universal Containers wants to standardize its business logic to ensure the logic's order is guaranteed to be the same each time. Which two features can an App Builder use to accomplish this? (Choose two.)

| | | |
|---|---------------------------|--|
| A | Lightning Process Builder | Correct: With Process Builder an App Builder can determine the order of when processes trigger. |
| B | Workflow | Incorrect: Process Builder and Flow are more flexible and powerful tools for standardizing business logic. |
| C | Flow | Correct: With Flow an App Builder can determine the order of when processes trigger. |
| D | Global Quick actions | Incorrect: Global Quick Actions are used on pages to support user actions. |

Question 3

Universal Containers needs to update a field on an Account when an Opportunity Stage is changed to Closed Lost and send an email to management. Which two tools can be used to accomplish this requirement?

| | | |
|---|------------------|--|
| A | Process Builder | Correct. With Process Builder cross object fields can be updated and an email alert assigned to the action. |
| B | Flow | Correct. With Flow cross object fields can be updated and an email alert assigned to the action. |
| C | Approval Process | Incorrect. Approval Processes are used to specify a sequence of steps that are required to approve a record. |
| D | Assignment Rule | Incorrect. Assignment Rules are used to determine how records are assigned to users or queues. |

Did you get a scenario wrong? Check out the table for related study material.

| | |
|------------|---|
| Question 1 | Review Respond to an Approval Request to understand more about what permission a user needs to respond to a request. |
| Question 2 | Explore the Lightning Process Builder and learn about the three types of processes and order when executed. |
| Question 3 | Study Which Automation Tool Do I Use to identify the type of business process that you're automating and use the proper tool. |

Exam Topic Flashcards

The following flashcards cover AppExchange apps, sharing solutions, and standard objects. Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam.

Read the question or term on each card, then click or tap the card to reveal the correct answer. Click the right-facing arrow to move to the next card, and the left-facing arrow to return to the previous card.

Interactive Flashcards

Card 1

| | |
|--|---|
| How can the record type for a converted lead be set based on the user that is converting the lead? | Set the default record types for each Profile for Account, Contact, and Opportunity to the desired record type for converted records. |
|--|---|

Card 2

| | |
|--|---|
| What is the correct order of execution validation rules are processed? | Validation rules, Assignment rules, Auto-response rules, Workflow rules (with immediate actions), Escalation rules. |
|--|---|

Card 3

| | |
|--|---------|
| What function should an App Builder use to return "today's" date in a formula field? | TODAY() |
|--|---------|

Card 4

| | |
|--|---|
| What fields are available when MIN or MAX rollup type is selected? | <ul style="list-style-type: none"> • Number • Currency • Percent • Date • Date/Time. |
|--|---|

Card 5




| | |
|--|---|
| Which action is not executed after a reevaluated workflow? | Time-dependent actions aren't executed for a reevaluated workflow rule. |
|--|---|

Did you get a flashcard wrong? Check out the table for related study material.

| | |
|-------------|--|
| Flashcard 1 | Study Considerations for Converting Leads to learn how record types behave during lead conversion. |
| Flashcard 2 | Review where validation rules are in the order of execution by studying Validation Rule Considerations . |
| Flashcard 3 | Learn the Elements of a Formula to identify specific formula functions, use cases, and capabilities for formula fields. |
| Flashcard 4 | Describe the use cases and capabilities of a Roll-Up Summary Field . |
| Flashcard 5 | Learn about Considerations for Time-Dependent Actions and Time Triggers to understand the ramifications of field updates when potential recursion could occur. |

Related Badges

Looking for more information? Explore these related badges.

| Badge | Content Type |
|---|--------------|
|  Formulas and Validations | Module |
|  Lightning Experience Productivity | Module |
|  Build a Battle Station App | Project |
|  Flow Builder | Module |
|  Flow Testing and Distribution | Module |
|  Automate Your Business Processes with Lightning Flow | Trail |

| | |
|--|------------|
|  App Customization Specialist | Superbadge |
|  Process Automation Specialist | Superbadge |

You've reviewed the Business Logic and Process Automation section of the exam. Next, let's take a look at the App Deployment section.

Unit 3: Learn About App Deployment

Learning Objectives

After completing this unit, you'll be able to:

- Recommend a solution for key milestones and considerations when managing the application lifecycle and various types of Sandboxes.
- Demonstrate knowledge, viability, and troubleshooting when using changesets.
- Describe the use case and considerations when using unmanaged and managed packages.
- Determine the appropriate deployment plan.


Key Topics

This unit prepares you for the App Deployment section of the Salesforce Platform App Builder exam, which makes up 10% of the overall exam. This section of the exam tests these topics.

- Application lifecycle management
- Sandboxes
- Changesets
- Packaging

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you'll encounter as a Salesforce Platform App Builder. Looking at these scenarios helps prepare you to take the App Deployment section of the Salesforce Platform App Builder exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

Exam Practice Questions

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Interactive Questions

Question 1

An App Builder at Universal Containers has completed all development for a new sales app. The release manager confirms the change set is ready and notices a number of apex unit tests are included. What is the best way to reduce deployment time to production?

| | | |
|---|--|---|
| A | Deploy each metadata component individually. | Incorrect. Deploying each component individually is not efficient or effective. You can initiate multiple deployments, but only one deployment can run at a time. The other deployments remain in the queue until the current one finishes. |
| B | Perform a Quick Deploy and only run specific Apex tests. | Correct. All Apex tests are run in production as part of a deployment. Executing all tests can be time-consuming and delay your deployment. Using quick deployments gives the ability to deploy and execute specific tests. |
| C | Manually create the metadata in production. | Incorrect. There is no need to create metadata in production. Development should take place in a sandbox and then the changes are released to production. |
| D | Lock users from logging in and perform the deploy. | Incorrect. Locking users from logging in during the deploy does not improve the time to deploy. It only ensures no data changes or activity will be lost during the deployment. |

Question 2

An App Builder at Universal Containers is working on a project that requires them to work with specific metadata and about 2GB of sample data from production. What sandbox would the App Builder use to meet their requirements?

| | | |
|---|---------------|--|
| A | Partial Copy | Correct. Partial Copy sandboxes have the data limit of up to 5GB and can be created using specific sandbox templates giving the developer a sandbox with specific metadata and sample data. |
| B | Full | Incorrect. The Full sandbox has all metadata and production data whereas the new developer only needs to work with specific metadata and data. The Full sandbox is not ideal for development as that sandbox is used for processes later in the development cycle such as performance testing and staging. |
| C | Developer Pro | Incorrect. The Developer Pro sandbox has the size limit of 1GB for data and storage. This sandbox also does not contain any data, only metadata. |
| D | Developer | Incorrect. The Developer sandbox has the size limit of 200MB for data and storage. This sandbox also does not contain any data, only metadata. |

Question 3

Universal Containers is preparing for a hackathon session with the development team. An App Builder needs to share a package of components with many sandboxes at once. What package type can the App Builder use to meet this requirement?

| | | |
|---|--------------------|---|
| A | Managed - beta | Incorrect. Managed packages are typically used by Salesforce partners to distribute and sell applications to customers. Managed packages also prevent destructive changes, like removing objects or fields once installed. |
| B | Managed | Incorrect. Managed packages are typically used by Salesforce partners to distribute and sell applications to customers. Managed packages also prevent destructive changes, like removing objects or fields once installed. |
| C | Unmanaged | Correct. Unmanaged packages are typically used to distribute open-source projects to provide developers with the basic building blocks for an application. Once the components are installed, the components can be edited in the organization they are installed in. |
| D | Managed - released | Incorrect. Managed packages are typically used by Salesforce partners to distribute and sell applications to customers. Managed packages also prevent destructive changes, like removing objects or fields once installed. |

Question 4

Which sandbox type is intended to be used for staging and a testing environment?

| | | |
|---|---------------------|--|
| A | <u>Full Sandbox</u> | Correct: A Full Sandbox is intended to be used as a staging and testing environment. This sandbox includes a copy of production metadata and sample production data. |
| B | Partial Copy | Incorrect: This is only a partial copy created with a template. Not all scenarios are able to be tested. |
| C | Developer | Incorrect: Developer sandbox only includes a copy of metadata from production. |
| D | Developer Pro | Incorrect: Developer Pro is intended for development and testing in an isolated environment. This sandbox only includes metadata from production. |

Did you get a scenario wrong? Check out the table for related study material.

| | |
|------------|---|
| Question 1 | Identify an appropriate deployment plan by studying how to Monitor Deployments . |
| Question 2 | Learn the differences between the various types of sandboxes by studying Sandbox Licenses and Storage by Type . |
| Question 3 | Study how to Prepare Your Apps for Distribution to learn when to use different packaging types. |
| Question 4 | Identify which sandbox type is ideal to use for staging and testing by studying Sandbox Types and Templates . |

Exam Topic Flashcards

The following flashcards cover custom buttons, links, and actions. Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam.

Read the question or term on each card, then click or tap the card to reveal the correct answer. Click the right-facing arrow to move to the next card, and the left-facing arrow to return to the previous card.

Interactive Flashcards

Card 1

| | |
|--|---------------|
| What is one component that is unavailable in a change set? | Account Teams |
|--|---------------|

Card 2

| | |
|----------------------------|---|
| What is a managed package? | A managed package is a collection of components that are made available to other organizations through the AppExchange. |
|----------------------------|---|

Card 3

| | |
|---|--------|
| What is the refresh interval of a Partial Copy Sandbox? | 5 days |
|---|--------|

Card 4


| | |
|---|--|
| For new app development, what deployment plan is best practice for the App Builder to follow? | Develop, test, build the release, stage, release |
|---|--|

Did you get a flashcard wrong? Check out the table for related study material.

| | |
|-------------|---|
| Flashcard 1 | Review the list of Components Available in Change Sets . |
| Flashcard 2 | Study up on Manage Packages to learn the use cases and considerations for using different package types. |
| Flashcard 3 | Learn about the various types of sandboxes and their purposes by studying Sandbox Licenses and Storage by Type . |
| Flashcard 4 | Review the Application Lifecycle and Development Model Trailhead badge to identify the key milestones in the application lifecycle. |

Related Badges

Looking for more information? Explore these related badges.

| Badge | Content Type |
|---|--------------|
|  Determine Which Application Lifecycle Management Model Is Right for You | Trail |

Congratulations. You've covered over 60% of the Salesforce Platform App Builder Certification test material in this badge.

You've reviewed these sections.

- Data Modeling and Management
- Business Logic and Automation
- App Deployment

You've completed the badges in the Study for the Salesforce Platform App Builder Certification trail. Good luck on your exam!