Study for the Platform App Builder Exam

Platform App Builder Certification Prep: Fundamentals and User Interface

Unit 1: Get Started with Platform App Builder Certification Prep

Learning Objectives

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

- Describe the key topic areas of the Salesforce Platform App Builder Certification.
- Access resources to prepare yourself for the Salesforce Platform App Builder Certification.

The Salesforce Platform App Builder Certification

The Salesforce Platform App Builder credential is designed for individuals who have experience developing custom applications on the Lightning Platform. They enhance the Salesforce Platform experience and extend Salesforce functionality through development and enablement on the Lightning Platform.

Salesforce Platform App Builders generally have at least 6 months' experience in the following areas.

- Familiarity with the capabilities of the Lightning Platform
- Awareness of Salesforce license types and related considerations
- Ability to design applications to support business processes and reporting requirements
- Familiarity with capabilities and customization used to enhance the mobile user experience
- Familiarity with the Salesforce development environments and the options available to deploy applications and manage changes on the Lightning Platform

This exam covers these key sections, each making up a certain percentage of the exam.

- Salesforce Fundamentals: 23%
- User Interface: 17%
- Data Modeling and Management: 22%
- Business Logic and Process Automation: 28%
- App Deployment: 10%

By successfully passing the Salesforce Platform App Builder exam, demonstrate a thorough knowledge of developing custom applications on the Lightning Platform.

Preparing for the Exam

Preparing for the Salesforce Platform App Builder exam takes time! This module takes you through preparing for part of the exam. There is one additional module to help you continue your journey toward certification.

- Platform App Builder Certification Prep: Data Modeling and App Deployment

All modules contain real-world scenarios, interactive flashcards, links to resources, and key topic areas to study. Don't forget to join the Trailblazer Community, where you can ask questions, collaborate, and join groups to help you prepare for your exam.

Exam Logistics and Policies

Curious about the logistics of the exam? Here are some quick facts for you.

Recommended Experience	6 months to 1 year of experience building applications on the Lightning Platform
Number of Questions	60
Passing Score	63%
Time to Complete the Exam	105 minutes
Results	Received immediately
Cost	$200
Location	Online or at a facility in your area
Restrictions	No hard-copy or online materials can be referenced during the exam

The quality of our certification exams and the value our credentials provide are our highest priorities. Protecting the security and confidentiality of our exams is essential to providing our customers with credentials that are respected and industry-leading.

As a participant of the Salesforce Certification program, you're required to accept the terms of the Salesforce Certification Program Agreement. Read the Salesforce Certification Program Agreement and Policies to take a look at some important reminders about the certification exam.

Maintain Your Certification

Once you take and pass your exam (woohoo!), how do you maintain your certification?

To maintain Salesforce Certification credentials, all certified professionals must successfully complete release maintenance exams specific to their credential. You are required to complete a Salesforce Platform App Builder certification maintenance module on Trailhead once a year. If you don't complete your maintenance requirements by the completion due date, your credentials expire.

Note: For more information about certification maintenance, visit the Maintaining Your Salesforce Credential page.

What This Module Covers

This module is focused on these key topics, with each topic covered in its own unit.

- Salesforce Fundamentals: 23%
- User Interface: 17%

In each of the units, you learn the key areas to study for each section of the exam, including working through common scenarios.

Up first, dive into the exam section on Salesforce Fundamentals. Let's go!

Resources

- *Trailhead*: Prepare for Your Salesforce Platform App Builder Credential
- *Trailhead*: Security Specialist
- *Trailhead*: Process Automation Specialist
- *Trailhead*: App Customization Specialist

Unit 2: Study Salesforce Fundamentals

Learning Objectives

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

- Identify the boundaries of declarative customization and the use cases for programmatic customization.
- Identify common scenarios for extending org functionality using AppExchange.
- Apply features and capabilities to restrict and extend object, record, and field access.
- Determine the appropriate sharing solution that meets business requirements.
- Identify the features and capabilities available when creating reports, report types, and dashboards.
- Determine the appropriate global, object-specific actions, and layouts to optimize the Salesforce mobile user experience that meets requirements.
- Describe the customizations and multiple use cases available for Chatter.

Key Topics

This unit prepares you for the Salesforce Fundamentals section of the Salesforce Platform App Builder exam, which makes up 23% of the overall exam. This section of the exam tests these topics.

- Standard Salesforce objects
- Restricting and extending object, record, and field access
- Determining appropriate sharing solutions
- Programmatic use cases
- AppExchange apps
- Capabilities of reports, report types and dashboards
- Mobile
- Chatter

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 Salesforce Fundamentals 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

The marketing manager at Universal Containers is sending communication emails out to customers and wants to track the open rates over the next few weeks. They are only sending a small number of emails. What should the app builder recommend to meet these requirements?

A	Use a third-party tool and integrate it into Salesforce.	Incorrect. This is not the ideal solution as customers can get apps that extend functionality through Salesforce AppExchange.
B	Download an app from AppExchange to extend functionality.	Correct. You can get apps on AppExchange to extend the functionality of the tool. AppExchange is the official Salesforce app marketplace to get applications that meet our security and trust requirements.
C	Outsource a contractor to develop a custom app just for this requirement.	Incorrect. This is not an ideal solution. The cost and time to develop a custom tool would go beyond the date when the marketing manager would need the tool. Instead, the contractor should consider downloading an app from AppExchange to extend functionality.
D	Use a third-party platform that meets these requirements.	Incorrect. This is not the ideal solution as customers can get apps that extend functionality and use cases through Salesforce AppExchange.

Trailhead Document

TRAILHEAD

Question 2

	A sales manager from Universal Containers wants to assign leads that come in from its website to queues. What standard process can the app builder recommend?	
A	Create a lead assignment rule that sort leads into queues	Correct. First, create a lead queue and select a default owner in lead settings for the leads that don't meet the assignment criteria. Then create a lead assignment rule and activate it.
B	Create a manual process to sort leads into queues.	Incorrect. Leads can be automated using a lead assignment rule to sort leads that come in from a website into lead queues. Create a lead assignment rule and activate it.
C	Create an Apex class that sort leads into queues.	Incorrect. The best way to sort leads that come in from a website is to use lead queues to create a lead assignment rule and activate it.
D	Create a default lead owner that sort leads into queues.	Incorrect. This will not work because lead owners cannot filter leads into queues. Only lead assignment rules can filter leads based on assignment criteria in a lead assignment rule. The best way to sort leads that come in from a website is to use lead queues, create a lead assignment rule, and activate it.

Question 3

	Senior sales managers need to be able to manage account records but cannot be given the Modify All permission. How can the app builder meet this requirement while applying the least privilege possible?	
A	Modify the profile assigned to senior managers, and enable modify app on object settings.	Incorrect. This is not the best solution since modifying the profile affects all users assigned to that profile. The best solution would be to create a custom permission set with the appropriate permissions, and assign that permission set to the senior managers.
B	Create a new custom profile with the enabled permissions and assign the new profile to senior managers.	Incorrect. This is not the best solution since only a small number of users need this additional access. The best solution would be to create a custom permission set with the appropriate permissions, and assign that permission set to the senior managers.
C	Adjust the org-wide default to public read/write.	Incorrect. This is not the best solution since org-wide defaults don't determine what a user can do with records, only what a user can see. The best solution would be to create a custom permission set with the appropriate permissions, and assign that permission set to the senior managers.
D	Create a custom permission set with the appropriate access and assign the permission set to the senior managers.	Correct. Profiles give the base access and permission sets can extend that access. Since there are only a few senior managers that need this access, the ideal solution is to create and assign a custom permission set with the View All and Modify All object settings for Accounts.

Did you choose a wrong answer? Check out the table for related study material.

6

Question 1	Learn how to extend functionality of your Salesforce org by checking out the AppExchange Basics Trailhead badge.
Question 2	Review the Guidelines for Setting Up Web-to-Lead to better understand the declarative customizations to use with the core CRM objects.
Question 3	Review Custom Permissions to determine the appropriate solution when extending access to objects, records, and fields.
Question 4	Explore the different Sharing Rule Types to learn when to apply appropriate sharing solutions.
Question 5	Study Controlling Access Using Hierarchies to know who can see what records when using hierarchies.

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 many assignment rules can be active on Case?	For each rule type, only one rule can be in effect at any time.

Card 2

What is the maximum number of components a dashboard can have?	Up to 20 components

Card 3

What are the two sharing rule types?	Owner Based and Criteria Based

Card 4

Finance wants the salary field to only be visible to select employees. How can this be achieved?	Set the field-level security

Card 5

What two permissions are needed to create custom reports that all users can view?	Manage Public Reports and Create and Customize Reports

Card 6

Managers need to edit cases for subordinates, not cases for groups and view all cases.	Create standard role hierarchies and set organization-wide sharing defaults to public read/only

Card 7

Which two ways can an App Builder grant object-level access to users?	Profiles and Permission Sets

Did you choose a wrong answer? Check out the table for related study material.

Flashcard 1	Review Assignment Rules to learn more about assignment rules on the Case object.
Flashcard 2	Study Report Limits, Limitations, and Allocations to learn about what capabilities are available when creating reports, report types, and dashboards.
Flashcard 3	Explore Sharing Rule Types to learn about the two types of sharing rules.
Flashcard 4	Refresh your knowledge on controlling access at the field level by studying Field-Level Security.
Flashcard 5	Describe how to manage access to reports and dashboards by studying up on Access Levels for Report and Dashboard Folders.
Flashcard 6	Identify the appropriate solution for restricting and extending access to objects, records, and field access by studying Controlling Access Using Hierarchies.
Flashcard 7	Review User Permissions and Access to learn two ways to grant object-level access to users.

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
Lightning Experience Customization	Module
Lightning Experience Development	Module
AppExchange Basics	Module
Create Reports and Dashboards for Sales and Marketing Managers	Project
Lightning Experience Reports & Dashboards Specialist	Superbadge
Security Specialist	Superbadge

 Protect Your Salesforce Data	Trail
 Learn CRM Fundamentals for Lightning experience Trailhead	Trail

You've reviewed the Salesforce Fundamentals section of the exam. Next, let's take a look at the User Interface section.

Unit 3: Learn About the User Interface

Learning Objectives

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

- Describe the user interface customization options.
- Demonstrate the capabilities of and use cases for custom buttons, links, and actions.
- Determine the declarative options available for incorporating Lightning components in an application.
- Describe the programmatic customizations available for incorporating custom Lightning components in an application.

Key Topics

This unit prepares you for the User Interface section of the Salesforce Platform App Builder exam, which makes up 17% of the overall exam. This section of the exam tests these topics.

- User interface customization options
- Custom buttons, links, and actions
- Record types
- Lightning components

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 User Interface 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 ⬚ [alt text: Expand button] 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

The Sales team wants to enter in the key fields on an account. They would also like to ensure the fields are easily accessible in the mobile app. Which standard Lightning component can the App Builder recommend?

A	Accordion component	Incorrect. The accordion component organizes your components into collapsible sections. This does not meet the business requirement.
B	Record detail component	Incorrect. The Record Detail component displays fields and sections from the page layout associated with the object. Limiting fields on the page layout does not meet the business requirement.
C	Highlights panel	Correct. The Highlights Panel component displays key record fields and the fields that appear in the highlights panel come from the compact layout assigned to the object.
D	Rich-text component	Incorrect. Use the Rich Text component to add text and simple HTML markup to your Lightning page. This does not meet the business requirement.

Question 2

An App Builder at Universal Containers is creating a new Lightning app for the sales team. What considerations should the App Builder take to ensure the navigation menu is efficient?

A	Add all tabs for the navigation menu and let users remove what they don't use.	Incorrect. This is not possible as users cannot remove tabs from apps. Users can add and customize their navigation menu up to 50 items.
B	Limit the number of tabs selected for the navigation menu to a small number.	Correct. Users can't remove tabs, only add. If the development team adds 20 items for the app, then users can only add 30 more items. Users can add and customize their navigation menu up to 50 items.
C	Only add Chatter, reports, and dashboards. Let users customize and make the app what they need.	Incorrect. This is not efficient for users. The team needs to add the items ideal for the specific app's purpose, but keep the number items to a reasonable amount. Users can add and customize their navigation menu up to 50 items. Then cannot take away but only add items.
D	Create a custom homepage for users.	Incorrect. This is not efficient for users. The team needs to add the items ideal for the specific app's purpose, but keep the number items to a reasonable amount. Users can add and customize their navigation menu up to 50 items.

Question 3

An app builder has downloaded a custom Lightning component. Where should the app builder go to add the custom component to a page layout?

A	Lightning App Builder	Correct. Custom components in your org that are configured for use in the Lightning App Builder appear in the Lightning Components pane.
B	Dynamic Lightning Pages	Incorrect. Custom components in your org that are configured for use in the Lightning App Builder appear in the Lightning Components pane.
C	Visualforce components in Setup	Incorrect. Custom components in your org that are configured for use in the Lightning App Builder appear in the Lightning Components pane.
D	Lightning component Generator	Incorrect. Custom components in your org that are configured for use in the Lightning App Builder appear in the Lightning Components pane.

Did you choose a wrong answer? Check out the table for related study material.

Question 1	Review Standard Lightning Page Components to describe Lightning component options that can be added declaratively to a Lightning Page.
Question 2	Study Lightning App Builder Considerations to refresh your knowledge on the Lightning UI customization.
Question 3	Learn where to add a custom component to a Lightning page layout by reviewing Custom Lightning Page Components.

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 are the two types of Quick Actions?	• Object-specific quick actions • Global quick actions

Card 2

What are the three types of pages you can build with Lightning App Builder?	• Record • Home • App

Card 3

What picklist fields are used in the lead process are not available for record types?	• Case status • Lead status

Did you choose a wrong answer? Check out the table for related study material.

Flashcard 1	Refresh your knowledge on the two types of Quick Actions.
Flashcard 2	Review Lightning App Builder to learn about the three types of pages you can build with Lightning App Builder.
Flashcard 3	Study Limitations for Creating and Updating Record Types and Picklists to know what fields in the lead process are not available for record types.

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
Lightning App Builder	Module
Customize the User Interface for a Recruiting App	Project
Lightning Experience Specialist	Superbadge

Congratulations. You've covered over 40% of the Salesforce Platform App Builder Certification test material in this badge.

You've reviewed these sections.

- Salesforce Fundamentals
- User Interface

Be sure to review the other Salesforce Platform App Builder Certification Prep badge. Good luck on your exam!