

Salesforce Platform App Builder

Version	Fecha	Descripción
0.1	24/10/2024	Documento de estudio para el examen de Salesforce Platform App Builder

Introducción

Guía de estudio

El examen de Salesforce Platform App Builder es un examen que evalúa los conocimientos necesarios para construir aplicaciones en la plataforma Salesforce, incluyendo lógica empresarial y automatización de procesos. En este documento se recogen los conceptos más importantes que se deben conocer para aprobar el examen.

Los temas están organizados de acuerdo a la guía oficial de estudio y se incluye un desglose del peso de cada sección del examen.

Concept	Description
Scoring	63%
Time	105 minutes
Questions	60
Cost	USD \$200
Retake Fee	USD \$100

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

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- Apply features and capabilities available to restrict and extend object, record and field access
- Describe the customizations and uses cases for Chatter
- Business Logic and Process Automation
 - Given a scenario, demonstrate the use of formula fields to meet stated business requirements
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 - Given a scenario, demonstrate the use of validation rules to meet stated business requirements
 - Given a scenario, determine the capabilities and use cases for workflow, Flows and Process Builder
 - Workflow Rules
 - Flows
 - Process Builder
- Data Modeling and Management
 - Given a scenario, determine the appropriate data model
 - Given a scenario, determine the considerations when selecting or changing a field data type
 - Given a scenario, determine the options and considerations when importing and exporting data, including the capabilities of external data sources.
 - Given a scenario, explain the capabilities of the various relationship types and the implications of each on record access, user interface and reporting
- User Interface
 - Describe the user interface customization options.
- App Deployment
 - Given a scenario, determine the appropriate deployment plan
 - Given a set of business requirements, recommend a solution for key milestones and considerations when managing the application lifecycle and various types of sandboxes
 - Given a use case, demonstrate knowledge, viability and troubleshooting when using change sets
 - Describe the capabilities and consideration when using change set
 - Describe the uses cases and considerations when using unmanaged and managed packages

Salesforce Fundamentals

Decide on:

- when and why to pick an existing Salesforce Solution or search on the AppExchange.
- Which type of Solution to be chosen. Flow or Trigger.

Apex Email Handler

Identify the features and capabilities available when creating reports, report types and dashboards

Snapshots que son

Given a set of requirements, determine the appropriate global, object-specific actions and layouts to optimize the Salesforce mobile user experience

Mobile Navigation

- Smart Search Items

Identify common scenarios for extending an org using AppExchange apps.

Apply features and capabilities available to restrict and extend object, record and field access

A User can get delete access to a record if the user via Profile or permission set.

- Org Access
- Object Access
- Record Access
- Field Access

What are scoping rules?

Describe the customizations and uses cases for Chatter

Chatter is a collaboration tool that allows users to communicate with each other in real time. It is integrated with Salesforce and can be used to share information, files, and updates with other users.

Business Logic and Process Automation

Given a scenario, demonstrate the use of formula fields to meet stated business requirements

What is a formula field?

- A formula field is a read-only field that derives its value from a formula expression. The formula expression can include merge fields, operators, and functions.

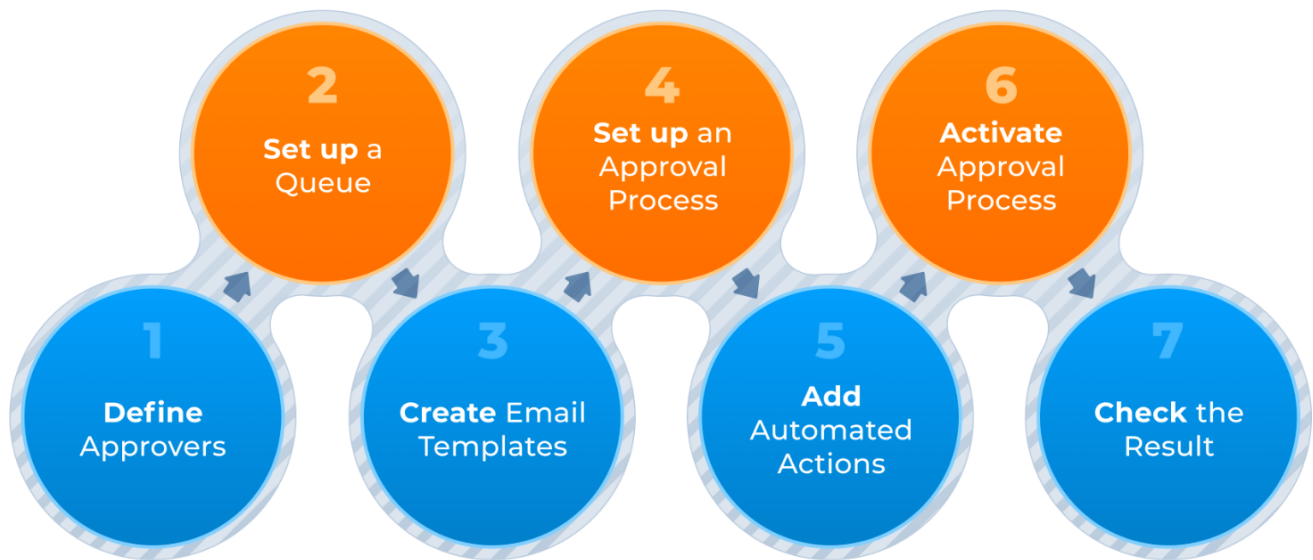
What field types can be used in formula fields?

- Text
- Number
- Currency
- Date
- etc What fields cannot be used in formula fields?
- Formula fields cannot be used in formula fields.
- Text Area fields cannot be used in formula fields.
- Rich Text Area fields cannot be used in formula fields.
- Long Text Area fields cannot be used in formula fields.

Given a scenario, determine the capabilities and use cases for approval processes

Approval Process

Steps to Set Up Approval Process in Salesforce



What is an approval process?

- Automated process for approving records in Salesforce
- Number of approvers can be defined in the process

Who can edit a record while submitted for approval?

- The System Administrator can edit a record while it is submitted for approval. Also the approver can edit the record while it is submitted for approval.
- Define the steps necessary for a record to be approved

Given a scenario, demonstrate the use of validation rules to meet stated business requirements

What is a validation rule?

A validation rule is a rule that verifies that the data entered in a record meets the specified criteria before the record can be saved.

VLOOKUP use to-do

Given a scenario, determine the capabilities and use cases for workflow, Flows and Process Builder

Workflow Rules

Flows

- Flow is a powerful tool that allows you to automate business processes in Salesforce. It can be used to create complex workflows, automate data entry, and integrate with external systems.

Variables in Flow etc

- Flow variables are used to store data that can be used in the flow. They can be used to store input data, output data, and intermediate data.

Process Builder

Data Modeling and Management

Given a scenario, determine the appropriate data model

Person Account cannot have hierarchical structure.

Given a scenario, determine the considerations when selecting or changing a field data type

All Types of fields:

Case Picklist to Multipicklist values retain

How text(encrypted) fields are stored in the database? work

- Encrypted text fields are stored in the database as encrypted values. The original value is not stored in the database, only the encrypted value is stored.
- Mask can be applied to the field to hide the original value. The mask is applied when the field is displayed in the user interface. The original value is not displayed in the user interface, only the masked value is displayed.

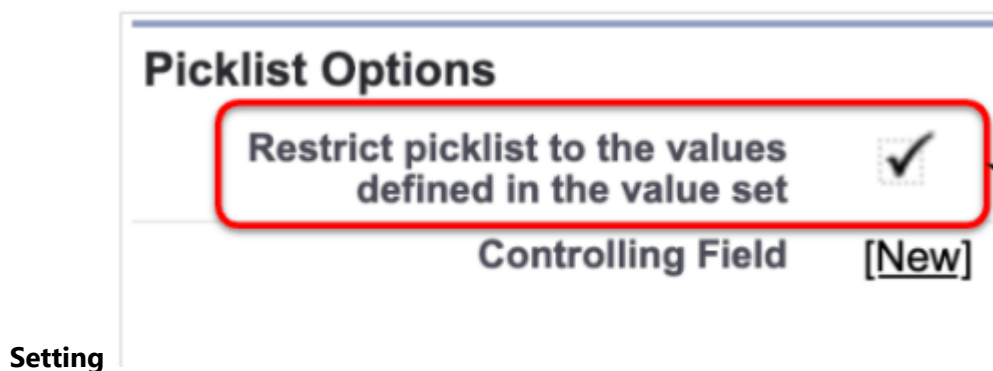
Given a scenario, determine the options and considerations when importing and exporting data, including the capabilities of external data sources.

Data Importing and Exporting Tools

- Data Import Wizard
- Data Loader
- Workbench
- Apex Data Loader

What happens when you try to import a file with values that are not in a restricted picklist?

- The import will fail and the values will not be imported into the system. Errors will be generated for each record that contains a value not in the restricted picklist.



Error

Error
INVALID_OR_NULL_FOR_RESTRICTED_PICKLIST:Current Status: bad value for restricted picklist field: Cancelled:Current_Status__c --
INVALID_OR_NULL_FOR_RESTRICTED_PICKLIST:Current Status: bad value for restricted picklist field: Cancelled:Current_Status__c --

Given a scenario, explain the capabilities of the various relationship types and the implications of each on record access, user interface and reporting

What is a relationship in Salesforce?

- A relationship is a link between two objects that allows you to associate records in one object with records in another object.

Master Detail

Limitations

- No more than 2 MD relationships to the same object

Child records in master-detail on custom objects can be reparented to different parent records by selecting the Allow Reparenting checkbox on the master-detail relationship definition.

Lookup

Limitations

- No Roll-up summary fields

User Interface

Describe the user interface customization options.

On Lightning App Builder you can customize and create the following:

- Lightning Pages
- Record Pages
- Home Pages
- App Pages

App Deployment

Sandboxes types This topic relies on how to maintain your application up to date between different environments.

Sandbox Refreshing

- Interval

Given a scenario, determine the appropriate deployment plan

What is staging

Given a set of business requirements, recommend a solution for key milestones and considerations when managing the application lifecycle and various types of sandboxes

Release Environments:

1. **Develop and Test:** Each of the members own Developer Sandbox to create their assigned customization. Developer Sandbox contain no production data.
2. **Build Release:** Each member migrates their customization from their DevSandboxes to a common DevProSandbox for integration. DPS do not contain production data but you can seed them with testing data.
3. **Test Release:** For UAT, the team uses a partial copy sandbox to create a complete replica of production (without production Data)
4. **Release:** After the release is in production, the team can use the full sandbox to train users without the risk of altering production data. A full sandbox includes a copy of production data.

Logging on to Sandbox environments

Sandbox Templates

Given a use case, demonstrate knowledge, viability and troubleshooting when using change sets

What is a Change Set?



- A change set is a container for components that you want to deploy from one Salesforce org to another. Change sets are used to move customizations between related orgs, such as from a sandbox to a production org.
- When a change set fails the entire transaction is rolled back
- Cannot be rolled back once deployed
- Validation is not required but recommended
- Can go from sandbox to production or production to sandbox

Inbound and Outbound

- Inbound change set: A change set that is received by an org. Inbound change sets are used to deploy components from a source org to a target org.
- Outbound change set: A change set that is sent from an org. Outbound change sets are used to deploy components from a target org to a source org.

Best Practices for change sets

1. Deploy all dependent components
2. Add permissions and access settings to outbound change set
3. Clone a change set to add dependent components to an uploaded change set
4. Use distinct names for global publisher layouts and Outlook publisher layouts
5. Plan deployments around maintenance schedule
6. Validate change sets before deployment
7. View component details

Describe the capabilities and consideration when using change set

Quick deploy run specified tests

Describe the uses cases and considerations when using unmanaged and managed packages

Packages on Salesforce

Managed Unmanaged

Naming conflicts