

CLOUD COMPUTING TUTORIAL-2

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Creating a Trailblazer App on Salesforce Trailhead

Session 1: Introduction to PaaS & Salesforce

Topics Covered:

- What is PaaS?
- Definition and benefits
- Examples of PaaS (Salesforce, AWS Elastic Beanstalk, Google App Engine)
- Introduction to Salesforce & Trailhead
- Overview of Salesforce as a CRM and PaaS platform
- What is Trailhead? (Salesforce's learning platform)
- How developers can build apps using Salesforce Lightning

Practical Demonstration:

- Show how Salesforce provides a ready-to-use development environment (No need to manage servers, databases, or infrastructure)
- Log in to Salesforce Trailhead

Session 2: Setting Up a Trailblazer Playground

Topics Covered:

- What is a Trailblazer Playground? (Salesforce Developer Environment)
- Creating a new Trailblazer Playground for app development
- Introduction to Lightning App Builder (Low-code app development tool)

Practical Demonstration:

1. Sign Up for Salesforce Trailhead
 - Go to [Salesforce Trailhead](#)
 - Click "Sign Up" (Use Google, LinkedIn, or Email)



Skill up for the Agentforce era with Trailhead

Learn in-demand skills for free to drive your company and career forward. Anyone can get hands-on experience building intuitive AI agents that handle everyday tasks, enhance the customer experience, and create business impact. Be an Agentblazer and transform how work gets



Step 1 of 4

Let's set up your free Trailblazer account.

Sign up using an existing account:

Google

Salesforce

MuleSoft

Tableau

[View more options](#)

Or

Business email

Next

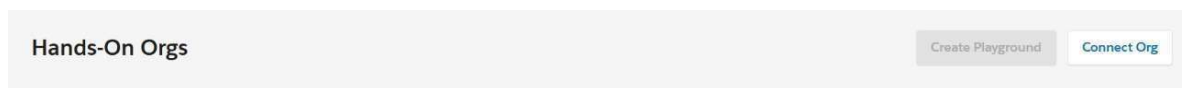
[Explore Trailblazer account benefits.](#)
Already have an account? [Log In.](#)

One account.
The best of Salesforce.

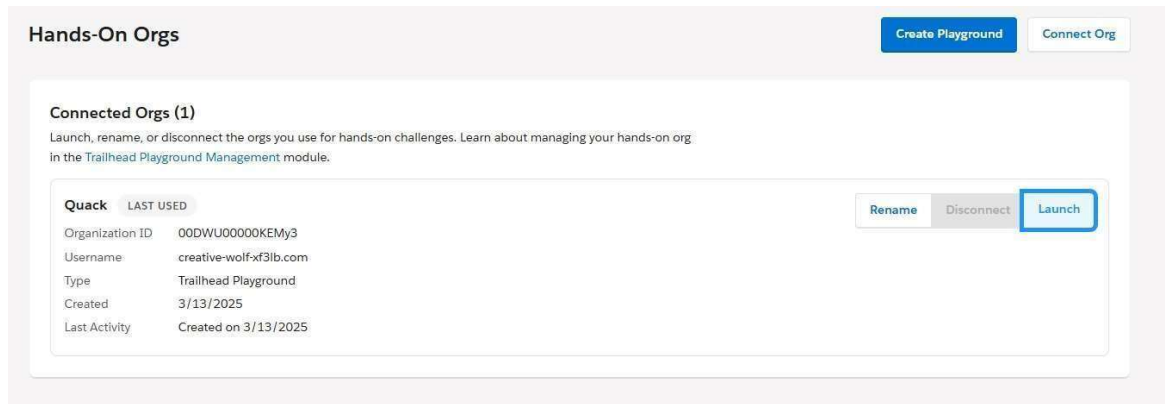
Online learning. Live and on-demand events. Original series.
Community. Support. And much more. Free.

[Explore Trailblazer account benefits](#)

- Launch Trailblazer Playground
 - Click on your profile → "Hands-On Orgs" → "Create a Playground"



- Wait for the environment to be set up



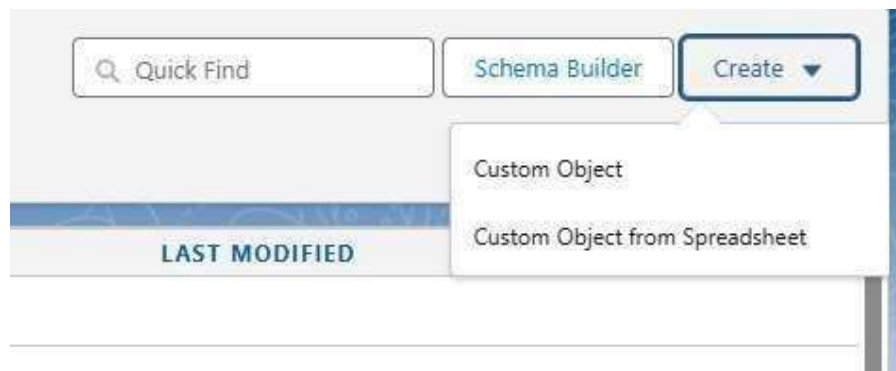
The play ground is created successfully, click on Launch to open the environment.

Session 3: Creating a Trailblazer App

Topics Covered:

- Building a Basic App in Salesforce o

Creating a Custom Object



- o Adding Fields & Data Types

SETUP
New Custom Object

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: Account Name

Data Type: Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

- ☒ Allow Reports
- ☒ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing [?](#)

- o Designing a User Interface (UI)

- Understanding No-Code/Low-Code Development

Practical Demonstration:

1. Create a New App in Salesforce Lightning

- o Open App Launcher → Click "New Lightning App"


SETUP
Lightning Experience App Manager

[New Lightning App](#) [New Connected App](#)

- o Name the app (e.g., "Student CRM App")

2. Add a Custom Object

- o Navigate to Setup → Object Manager → "Create Object"
- o Example: Create "Student" object with fields (Name, Course, Email)



SETUP
Tabs

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Select an existing custom object or [create a new custom object now](#).

Object: Waypoint

Tab Style: Insect

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description:

3. Customize Page Layout

- Drag and drop fields using the Lightning App Builder

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Create

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Approval Requests
- Approval Submission Details
- Approval Submissions
- Approval Work Items
- Account Action Sources

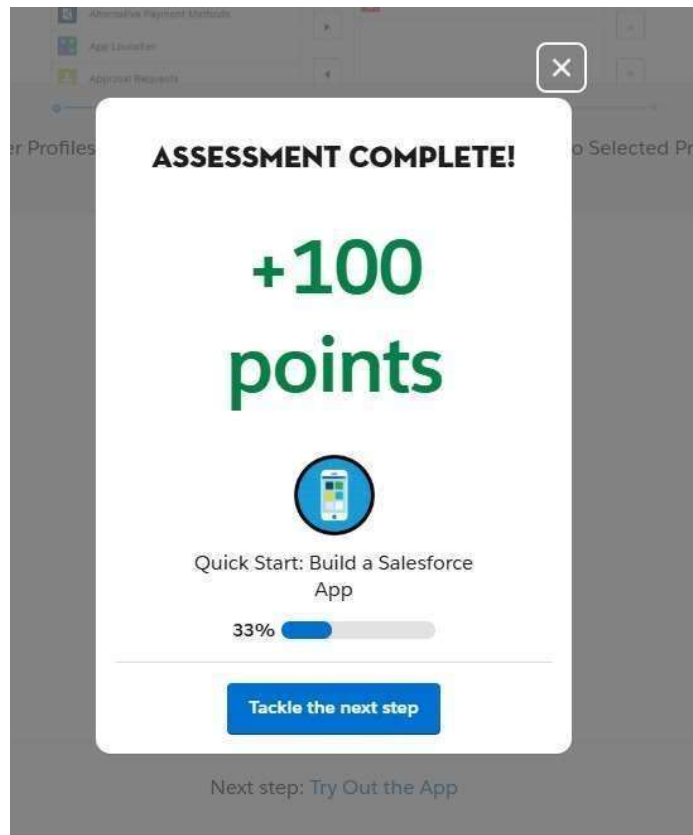
Selected Items

- Home
- Chatter
- Waypoints
- Reports
- Dashboards

Back

Next

Select the fields required in the Lightning App Builder.



Session 4: Automating Processes in the Trailblazer App

Topics Covered:

- What is Process Automation in Salesforce?
- Introduction to Flow Builder and Process Builder
- Setting up Automation Rules (e.g., Send email when a new student is added)

Practical Demonstration:

1. Create a Process Automation Rule
 - o Go to Setup → Process Builder



Global Actions New Action

Enter Action Information

Save

Cancel

Action Type

Create a Record

Target Object

Waypoint

Standard Label Type

--None--

Label

Waypoint

Name

Waypoint

Description

Create Feed Item

☒

Success Message

Icon

Change Icon

Save

Cancel

Creation of new Actions in Global actions

Waypoints		New	Import	Change Owner	Assign Label
Recently Viewed					
3 items • Updated a few seconds ago					
	Waypoint Name				
1	<input type="checkbox"/> El Capitan				
2	<input type="checkbox"/> Glacier Point				
3	<input type="checkbox"/> Half Dome				

Verify Step

+100 points

You'll be completing this project in your own hands-on org. Click **Launch** to get started, or click the name of your org to choose a different one.

Choose hands-on org

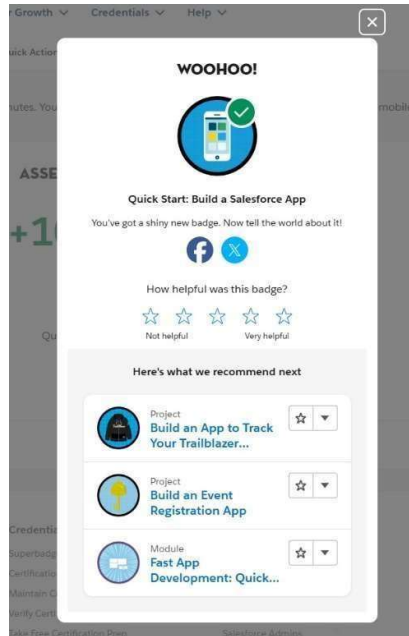
Quack

Created on 3/13/2025

⋮

Launch

Verify step to earn 100 points



- o Set a condition: "When a new Student record is created, send an email"

2. Run the App and Test

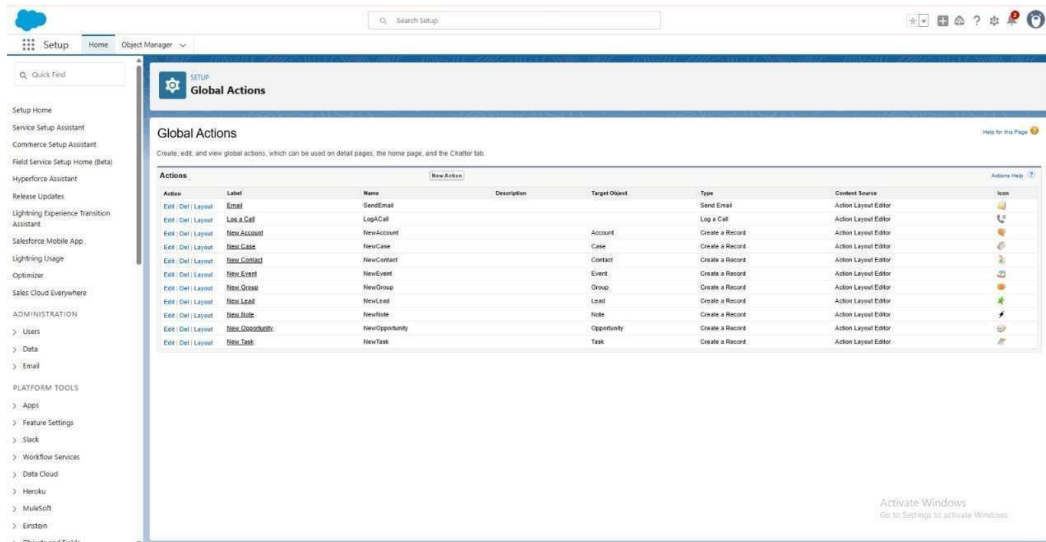
Session 5: Deploying & Testing the Trailblazer App

Topics Covered:

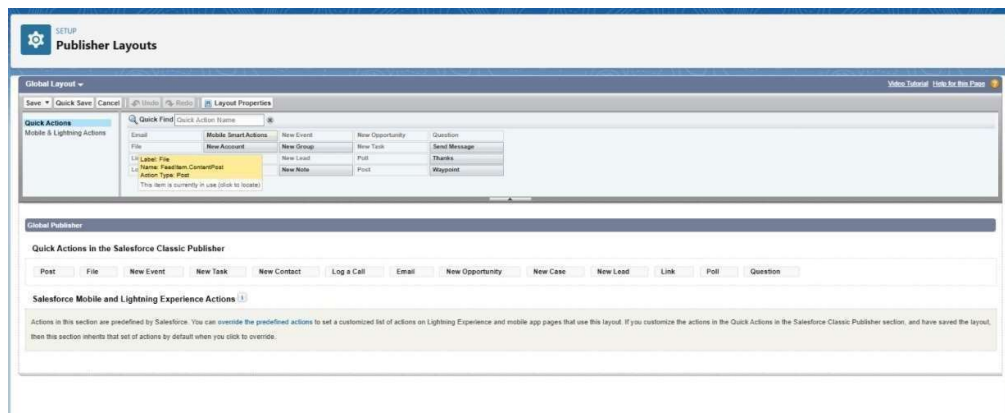
- How to test and debug the app
- Deploying the app in a Sandbox Environment
- Future improvements (adding AI, integrations)

Practical Demonstration:

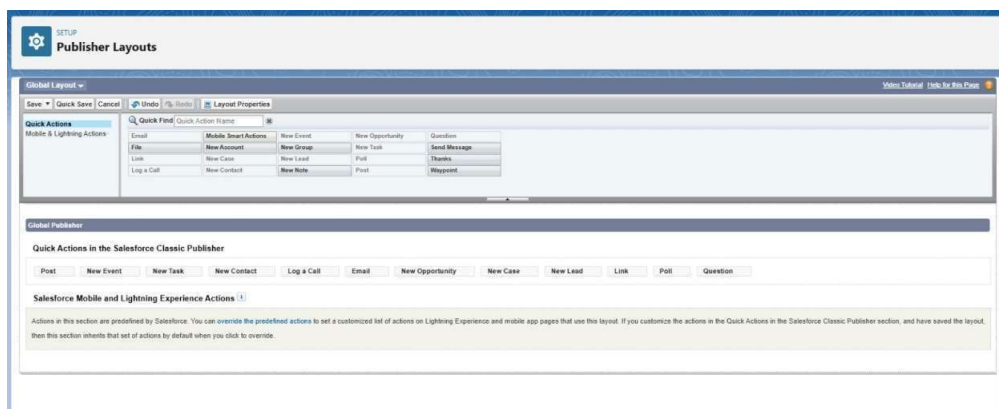
1. Test the App
 - o Add test student data
 - o Check if the automation works
2. Deploy the App
 - o Make the app available for different users



List of Global Actions that can be performed.



Here, the required quick actions can be added or removed by simply dragging and dropping the box as per requirement.



Verify Step

+100 points

You'll be completing this project in your own hands-on org. Click **Launch** to get started, or click the name of your org to choose a different one.

Choose hands-on org.

Quack
Created on 3/13/2025


⋮

Launch

⋮ Verify step to earn 100 points

ASSESSMENT COMPLETE!

+100 points



Quick Start: Build a Salesforce App

100%

Retake this Step

project

Thus, Build a Salesforce App entire process was completed.