QuickStart
Over 35 Years Of Technology Training

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Learning Style: Virtual Classroom

Technology: Salesforce

Difficulty: Advanced

Course Duration: 5 Days

Declarative Development for Platform App Builders in Lightning (DEX403)

About This Course:

In this 5-day class, our Salesforce experts will walk you through how to build a data model, assign and define profiles and permissions, and control access to records. Take a deep dive into Flow Builder and discover how to automate complex

business processes using automation. Learn how to manage data, develop unique UIs for specific users, and deploy Salesforce applications using clicks, not code.

Course Objectives:

- Build and customize multi-user Salesforce applications
- Create custom objects
- Manage your data and create validation rules
- Customize the user interface
- Make pages dynamic using Lightning App Builder
- Automate business processes with flows, Process Builder, workflows, and approval processes

Audience:

This class is ideal for developers who are new to Salesforce and want to gain declarative development skills. You should have experience writing programmatic solutions with any object-oriented language and strong working knowledge of programming constructs including loops, conditional branching, and sub-processing. You should also have some experience with relational databases. This is a great foundational class for anyone looking to earn their Salesforce App Builder credential.

Prerequisites:

- Experience writing programmatic solutions with any object-oriented language
- Strong working knowledge of programming constructs including loops, conditional branching, and sub-processing
- Experience with relational databases

Course Outline:

Data Model Development

- Create custom objects
- Create custom fields
- Create master-detail relationships
- Create lookup relationships
- Create many-to-many relationships
- Create lookup filters
- View and edit your schema graphically

Profiles and Permissions

- Create and customize profiles
- Create permission sets
- Set field-level security

Record Access

- Describe the levels of record access available
- Assign organization-wide defaults
- Create a role hierarchy
- Define sharing rules
- Manually share a record

Data Management

- Create custom validation rules
- Describe tools available for data management
- Export and import data
- Describe the Bulk API

User Interface Development

- Create custom apps, tabs, and pages
- View and customize the Salesforce mobile app
- Describe use cases for Quick Actions
- Create record types

Flow Basics and Screen Flows

- Describe the types of flows available
- Create a screen flow
- Add elements and resources to a flow
- Control navigation in a flow
- Describe the difference between user mode and system mode
- Debug a flow
- Deploy a flow

Record-Triggered Flows

- Describe the types of Data Manipulation Language (DML) available in Salesforce
- Identify differences between before and after triggers
- Configure a record-triggered flow
- Use the $Record and $Record__Prior global variables
- Debug a record-triggered flow
- Send custom notifications from a flow
- Configure a platform event-triggered flow

Process Builder and Workflow

- List the actions that can be triggered by a process and workflow
- Describe the difference between immediate and scheduled actions
- Describe use cases for a process and workflow
- Create processes and workflow rules
- Create an escalation using scheduled actions

Automation with Approvals

- List the components of a multi-step approval process
- Implement a multi-step approval process

Save Order of Execution

- Describe key points in the Order of Execution
- Describe how declarative programming fits into and can be impacted by the Order of Execution
- Describe the lifecycle of a transaction

Flow Best Practices

- Use naming conventions
- Describe how to avoid flow limits
- Describe the difference between flow transactions and flow interviews
- Describe how Flow handles bulkification
- Identify common problems that can occur with flow loops
- Call invocable Apex from a flow
- Identify when not to use Flow

App Deployment

- Contrast the differences between the various types of sandboxes
- Describe the capabilities, limitations, and considerations of change sets
- Describe the capabilities of unmanaged packages
- Create and install unmanaged packages
- Determine the appropriate deployment plan given a scenario

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