

Certification Preparation for Platform App Builder (CRT403)

Salesforce Fundamentals

- Capabilities of core CRM objects
- Boundaries of declarative customizations
- Use cases for programmatic customizations

Security

- Restricting and extending object, record, and field access
- Determining appropriate sharing solutions

Data Modeling and Management

- Determining an appropriate data model
- Relationship types and impact on record access, user interface, and reporting
- Considerations for changing field types
- Considerations of the schema builder
- Considerations for importing and exporting data
- Use cases of external objects

Reporting

- Creating reports
- Report types
- Dashboards

User Interface

- Customization options
- Custom buttons, links, and actions
- Declarative options for incorporating Lightning Components

Mobile

- Declarative customizations available for the Salesforce1 user interface

Business Logic and Process Automation

- Record types
- Formula fields
- Roll-up summary fields
- Validation rules
- Approval processes
- Workflow
- Visual workflow
- Process builder
- Automating business processes
- Ramifications of field updates and potential for recursion

App Deployment

- Application lifecycle
- Sandboxes
- Change sets
- Unmanaged and managed packages
- Determining an appropriate deployment plan

Wrapping Up

- Test preparation
- Practice exam