

SALESFORCE

INTERMEDIATE

5 DAYS

Salesforce Platform App Builder

Build a strong foundation in Salesforce administration and configuration by mastering core concepts such as data modeling, security, and automation. Learn how to customize objects, streamline business processes, design user friendly interfaces, and manage Salesforce applications effectively.

Why App Builder?

Rapid Solution Deployment

Having in-house expertise in creating and managing custom data applications and workflows means you can quickly develop and deploy business solutions without waiting on external developers. This will help you respond faster to changing market demands.

Effective Data Management

With App Builder skills, your teams can organize and access customer data more efficiently. They can create custom objects, filters, and fields that match your business structure, allowing for more targeted data usage.

Cost Efficiency

By equipping your team to build and maintain custom data apps internally, you can cut down on expenses related to third-party software and service providers. This enables you to keep more of your budget focused on business growth.

Streamlined Operations

By training your teams in App Builder, you can automate and simplify essential workflows. Over time, this helps in reducing dependence on manual processes, boosting overall efficiency with reduced human errors.

What you'll be able to do

- ✓ Build a solid understanding of Salesforce fundamentals, including data modeling, security, and process automation.
- ✓ Learn to create and manage custom objects, fields, and relationships within Salesforce.
- ✓ Gain proficiency in automating business processes using tools like Flow Builder, Process Builder, and approval processes.
- ✓ Learn to design and customize user interfaces using Lightning App Builder and other Salesforce tools.
- ✓ Acquire skills to deploy and manage Salesforce applications.

Who this is for

- Developers
- Business analysts
- Salesforce admins
- IT managers

Curriculum

01 Lightning Customization

- Apply lightning customization in Salesforce delivery workflows
- Configure or implement with hands-on practice
- Validate outcomes against admin/dev standards
- Document decisions for handoff and reuse

02 Data Modeling and Picklists

- Apply data modeling and picklists in Salesforce delivery workflows
- Configure or implement with hands-on practice
- Validate outcomes against admin/dev standards
- Document decisions for handoff and reuse

03 Duplicate Management

- Apply duplicate management in Salesforce delivery workflows
- Configure or implement with hands-on practice
- Validate outcomes against admin/dev standards
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04 Formulas and Validations

- Apply formulas and validations in Salesforce delivery workflows
- Configure or implement with hands-on practice
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05 Approvals and Screen Flows

- Apply approvals and screen flows in Salesforce delivery workflows
- Configure or implement with hands-on practice
- Validate outcomes against admin/dev standards
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06 Lightning App Builder

- Apply lightning app builder in Salesforce delivery workflows
- Configure or implement with hands-on practice
- Validate outcomes against admin/dev standards
- Document decisions for handoff and reuse

07 Reports and Dashboards

- Apply reports and dashboards in Salesforce delivery workflows
- Configure or implement with hands-on practice
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08 Leads/Opportunities Productivity

- Apply leads/opportunities productivity in Salesforce delivery workflows
- Configure or implement with hands-on practice
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09 Data Loader

- Apply data loader in Salesforce delivery workflows
- Configure or implement with hands-on practice
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10 Identity and AppExchange

- Apply identity and appexchange in Salesforce delivery workflows
- Configure or implement with hands-on practice
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11 Org vs Package Development

- Apply org vs package development in Salesforce delivery workflows
- Configure or implement with hands-on practice
- Validate outcomes against admin/dev standards
- Document decisions for handoff and reuse