

Module Title : Declarative Development for Platform App Builders in Lightning Experience (DEX403)
Duration : 5 days

Overview

This comprehensive hands-on course is a must for new application developers or developers who are new to Salesforce. Participants will learn how to use the declarative "clicks not code" capabilities of the Lightning platform to create custom applications and customize existing applications. Build your knowledge of objects, fields, UI customization, automation tools, security, app deployment, and more!

Who should take this course?

Ideal for programmers and point-and-click developers who want to understand the declarative development tools available on the platform.

When you complete this course, you will be able to:

- Build and customize multi-user Salesforce applications.
- Create custom objects.
- Customize the user interface.
- Create advanced workflows and validation rules.
- Automate business processes with Process Builder, approvals, and flows.
- Manage your data.
- Develop a custom user interface using Lightning App Builder.

Lessons and Topics

Building Your Data Model

- Understanding Objects on the Lightning Platform
- Creating Custom Objects
- Creating Custom Fields
- Creating Relationships Between Objects
- External Objects
- Schema Builder

Profiles and Permissions

- Profiles

- Permission Sets
- Field Level Security

Controlling Access to Records

- Record Ownership
- Organization Wide Defaults
- Roles and Groups
- Sharing

Building Your User Interface

- Custom Applications and Custom Tabs
- Page Layouts
- Lightning App, Record, and Home Page
- Salesforce Mobile App
- Quick Actions

Record Types

- Record Types and the User Interface
- Meeting User Requirements

Introducing Business Logic

- Formula Fields
- Roll-Up Summary Fields
- Useful Operators and Functions

Monitoring Processes

- Debug Logs
- Developer Console

Preserving Data Quality

- Enforcing Conditionally Required Fields
- Enforcing Proper Data Format
- Enforcing Consistency
- Preventing Data Loss

Automating with Lightning Process Builder and Workflow

- Processes
- Scheduled Actions
- Workflow Rules

Automating Business Processes with Approvals

- Defining Approval Processes

- Options for Approving Records

Automating Business Processes Using Flow

- Understanding Flow
- Creating Flows
- Deploying Flows
- Autolaunched Flows

Save Order of Execution

- Exploring the Save Order of Execution
- Working with Transactions

Auditing Processes

- Auditing Configuration Changes
- Auditing Data
- Keeping Track of Unauthorized Changes

Deploying Your App

- Sandboxes
- Change Sets
- Alternatives to Change Sets

Data Management

- Data Operations (Export, Delete, Insert, Update, Upsert)
- Tools for Data Management
- Bulk API

Reports and Dashboards

- Report Types
- Reports
- Dashboards
- Folders
- Reporting Snapshots

Deciding When Declarative Isn't Enough

- Declarative Limits
- Programmatic Alternatives

Final Project