

Unit 1: Review Business Logic and Process Automation

Welcome Trailblazer! Congratulations on taking the next step on your Salesforce credentialing journey! Studying for the Platform App Builder Certification has never been easier. Everyone likes to study content in different ways. Whether you are hitting the trails through Trailhead, or prefer to use flashcards, we've got you covered! Throughout this trail, we have linked to badges that will help you learn concepts covered in the exam and created a printable version of this module that includes study flashcards. Click here to download a printable version of this module and take notes as you go.

Learning Objectives

After completing this unit, you'll be able to:

- Describe the capabilities of and use cases for record types.
- Describe the capabilities of and use cases for formula fields.
- Describe the capabilities of and use cases for validation rules.
- Describe the capabilities of and use cases for approval processes.
- Describe the capabilities of and use cases for workflow, flow, and Process Builder.
- Describe the capabilities of, use cases for, and implications of roll-up summary fields.
- Given a set of business requirements, recommend a solution to automate business processes.
- Describe the ramifications of field updates and the potential for recursion.

Key Topics

This unit prepares you for the business logic and process automation section of the Salesforce Platform App Builder exam, which makes up 27% of the overall exam. This section of the exam tests these topics.

- Workflows, flows, and Process Builder
- Automating business processes and approvals
- Ramifications of field updates and potential for recursion
- Formula fields
- Record types
- Roll-Up summary fields
- Validation rules

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you can encounter as a Salesforce Platform App Builder. Looking at these scenarios helps prepare you to take the business logic and process automation section of the Salesforce Platform App Builder exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

The unit also contains interactive flashcards centered around study topics that help you prepare for the business logic and process automation section of the exam.

Exam Practice Questions

Ready to jump in? The sample tool below is not scored—it's just an easy way to quiz yourself. To use it, read the scenario on the left side, then click on the answer you think is correct. Some questions may have more than one correct answer. Click submit, and you get a pop-up telling you whether the answer you chose is correct or incorrect, and why. When you reach the end, you can review the answers or retake the questions.

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Scenario 1

A sales representative at Universal Containers is the delegated approver for their manager's approval requests. The sales representative wants to be able to respond to approval requests through email. What permission do they need to meet this requirement?

ANSWER	FEEDBACK
A. THE USER NEEDS API ENABLED PERMISSION ON THEIR PROFILE OR ASSIGNED PERMISSION SET.	Correct. The API Enabled permission can be enabled on the profile or the permission set assigned to the user.
B. THE USER NEEDS SYSTEM ADMINISTRATOR PROFILE ASSIGNED.	Incorrect. This would give more access than the user needs. To respond to an approval request through email, the user will need API Enabled permission on their profile or assigned permission set.
C. THE USER NEEDS EMAIL ENABLED APPROVALS PERMISSION ON THEIR PROFILE OR ASSIGNED PERMISSION SET.	Incorrect. There is no such permission as Email Enabled Approvals. To respond to an approval request through email, the user needs API Enabled permission on their profile or assigned permission set.
D. THE USER NEEDS APPROVALS FOR EMAIL PERMISSION ON THEIR PROFILE OR ASSIGNED PERMISSION SET.	Incorrect. There is no such permission as Approvals for Email. To respond to an approval request through email, the user needs API Enabled permission on their profile or assigned permission set.

Platform App Builder Certification Prep: Business Logic and Reporting

Scenario 2

Universal Containers wants to standardize its business logic to ensure the logic's order is guaranteed to be the same each time. Which two features can an App Builder use to accomplish this? (Choose two.)

ANSWER	FEEDBACK
A. LIGHTNING PROCESS BUILDER	Correct: With Process Builder an App Builder can determine the order of when processes trigger.
B. WORKFLOW	Incorrect: Process Builder and Flow are more flexible and powerful tools for standardizing business logic.
C. FLOW	Correct: With Flow an App Builder can determine the order of when processes trigger.
D. GLOBAL QUICK ACTIONS	Incorrect: Global Quick Actions are used on pages to support user actions.

Did you get a scenario wrong? Check out the table below for related study material.

Scenario 1	Review Respond to an Approval Request to understand more about what permission a user needs to respond to a request.
Scenario 2	Explore Lightning Process Builder and learn about the three types of processes and order when executed.

Platform App Builder Certification Prep: Business Logic and Reporting

Exam Topic Flashcards

Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam. Read the question or term on each card, then click or tap the card to reveal the correct answer. Click the right-facing arrow to move to the next card and the left-facing arrow to return to the previous card.

Question/Term	Answer/Definition
How would an App Builder set the record type for a converted lead's Account, Contact, and Opportunity based on the user that is converting the lead?	Set the default record types for each Profile for Account, Contact, and Opportunity to the desired record type for converted records.
What is the correct order of execution validation rules are processed?	Validation rules, Assignment rules, Auto-response rules, Workflow rules (with immediate actions), Escalation rules.
What function should an App Builder use to return "today's" date in a formula field?	TODAY()
What fields are available when MIN or MAX rollup type is selected?	Number, currency, percent, date, and date/time.
Which action is not executed after a reevaluated workflow?	Time-dependent actions aren't executed for a reevaluated workflow rule.

Did you get a flashcard wrong? Check out the table below for related study material.

Flashcard 1	Study Considerations for Converting Leads to learn how record types behave during lead conversion.
Flashcard 2	Review where validation rules are in the order of execution by studying Validation Rule Considerations .
Flashcard 3	Learn the Elements of a Formula to identify specific formula functions, use cases, and capabilities for formula fields.
Flashcard 4	Describe the use cases and capabilities of a Roll-Up Summary Field .
Flashcard 5	Learn about Considerations for Time-Dependent Actions and Time Triggers to understand the ramifications of field updates when potential recursion could occur.

Platform App Builder Certification Prep: Business Logic and Reporting

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 Formulas and Validations	Module
 Lightning Flow	Module
 Workflow Rule Migration	Module
 Screen Flow Distribution	Module
 Flow Builder	Module
 Lightning Experience Productivity	Module
 Process Automation Specialist	Superbadge

Congratulations! You've studied up on the fundamentals portion of the exam. Up next, let's move to the next module and practice Security concepts.

Unit 2: Study Up on Social Features

Learning Objectives

After completing this unit, you'll be able to:

- Describe the capabilities of and use cases for social features.

Key Topics

This unit prepares you for the social section of the Salesforce Platform App Builder exam, which makes up 3% of the overall exam. This section of the exam tests these topics.

- Enable and link social accounts, contacts, and leads.

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you can encounter as a Salesforce Platform App Builder. Looking at these scenarios helps prepare you to take the social section of the Salesforce Platform App Builder exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

The unit also contains interactive flashcards centered around study topics that help you prepare for the social section of the exam.

Exam Practice Questions

Ready to jump in? The sample tool below is not scored—it's just an easy way to quiz yourself. To use it, read the scenario on the left side, then click on the answer you think is correct. Some questions may have more than one correct answer. Click submit, and you get a pop-up telling you whether the answer you chose is correct or incorrect, and why. When you reach the end, you can review the answers or retake the questions.

Platform App Builder Certification Prep: Business Logic and Reporting

Scenario 1

The marketing manager at Universal Containers wants to view Twitter social data on the Account record. However, when they compare one of their Account records with other marketing managers, the Twitter data is missing. What can the App Builder recommend?

ANSWER	FEEDBACK
A. SOCIAL IS NO LONGER ENABLED IN THE ORGANIZATION.	Incorrect. Since the colleague could see the social data, then Social is still enabled for the organization. In order to see social data on their records, the user needs to first link a personal social account and then log in.
B. THE MARKETING MANAGER NEEDS TO LINK A PERSONAL SOCIAL ACCOUNT.	Correct. In order to see social data, the user needs to link personal social account and log in.
C. TWITTER IS NOT SUPPORTED IN SOCIAL ACCOUNTS.	Incorrect. Twitter is supported in Social Accounts. In order to see social data, the user needs to link personal social account and log in.
D. THE MARKETING MANAGER DOES NOT HAVE PERMISSION TO ACCESS THE ACCOUNTS OBJECT ON THEIR PROFILE.	Incorrect. The marketing manager can see the Account record, but just not see the social data. In order to see social data, the user needs to link personal social account and log in.

Did you get a scenario wrong? Check out the table below for related study material.

Scenario 1	Study Twitter Profiles to Accounts, Contacts, and Leads to describe the capabilities of social features.
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Exam Topic Flashcards

Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam. Read the question or term on each card, then click or tap the card to reveal the correct answer. Click the right-facing arrow to move to the next card and the left-facing arrow to return to the previous card.

Question/Term	Answer/Definition
What three objects can be connected to a social network?	<ul style="list-style-type: none">• Accounts• Contacts• Leads

Did you get a flashcard wrong? Check out the table below for related study material.

Flashcard 1	Review capabilities and use cases for social features by studying Guidelines for Using Social Accounts, Contacts, and Leads .
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Platform App Builder Certification Prep: Business Logic and Reporting

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 Chatter Administration for Lightning Experience	Module
 Accounts & Contacts for Lightning Experience	Module

Congratulations! You've studied up on the fundamentals portion of the exam. Up next, let's move to the next module and practice Security concepts.

Unit 3: Review Reporting

Learning Objectives

After completing this unit, you'll be able to:

- Describe the features and capabilities available when creating reports, report types, and dashboards.

Key Topics

This unit prepares you for the reporting section of the Salesforce Platform App Builder exam, which makes up 5% of the overall exam. This section of the exam tests these topics.

- Creating reports and formatting
- Report types
- Dashboards

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you can encounter as a Salesforce Platform App Builder. Looking at these scenarios helps prepare you to take the reporting section of the Salesforce Platform App Builder exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

The unit also contains interactive flashcards centered around study topics that help you prepare for the reporting section of the exam.

Exam Practice Questions

Ready to jump in? The sample tool below is not scored—it's just an easy way to quiz yourself. To use it, read the scenario on the left side, then click on the answer you think is correct. Some questions may have more than one correct answer. Click submit, and you get a pop-up telling you whether the answer you chose is correct or incorrect, and why. When you reach the end, you can review the answers or retake the questions.

Platform App Builder Certification Prep: Business Logic and Reporting

Scenario 1

The VP of sales at Ursa Major is building a report to see a current total of sales grouped by each sales representative and wants to show those values in a chart. What report type should an App Builder use?

ANSWER	FEEDBACK
A. TABULAR	Incorrect. Tabular reports are great for showing a list of records and giving a single grand total.
B. SUMMARY	Correct. Summary reports are great for giving subtotals by groups of rows and can include charts.
C. MATRIX	Incorrect. Matrix reports are great for grouping rows and columns and comparing subtotals across those groupings.
D. JOINED	Incorrect. Joined reports provide multiple report blocks, where each block acts like a “sub-report.”

Did you get a scenario wrong? Check out the table below for related study material.

Scenario 1	Learn how to Choose a Report Format when creating reports, report types, and dashboards.
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Platform App Builder Certification Prep: Business Logic and Reporting

Exam Topic Flashcards

Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam. Read the question or term on each card, then click or tap the card to reveal the correct answer. Click the right-facing arrow to move to the next card and the left-facing arrow to return to the previous card.

Question/Term	Answer/Definition
What is the maximum number of components a dashboard can have?	Up to 20 components
What report types can be converted to a joined report?	<ul style="list-style-type: none">• Tabular• Summary• Matrix
What two permissions are needed to create custom reports that all users can view?	Manage Public Reports and Create and Customize Reports

Did you get a flashcard wrong? Check out the table below for related study material.

Flashcard 1	Study Report Limits, Limitations, and Allocations to learn about what capabilities are available when creating reports, report types, and dashboards
Flashcard 2	Learn about changing the report format by studying Choose a Report Format .
Flashcard 3	Describe how to manage access to reports and dashboards by studying up on Access Levels for Report and Dashboard Folders .

Platform App Builder Certification Prep: Business Logic and Reporting

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 <u>Reports and Dashboards for Lightning Experience</u>	Module
 <u>Create Reports and Dashboards for Sales and Marketing Managers</u>	Project
 <u>Lightning Experience Reports and Dashboard Specialist</u>	Superbadge

Congratulations! You've studied up on user setup. Up next, let's cover standard and custom objects.

Unit 4: Study Up on Mobile

Learning Objectives

After completing this unit, you'll be able to:

- Describe the declarative customization options available for the Salesforce mobile application user interface.
- Given a set of requirements, determine the appropriate global and object-specific actions and action layouts to optimize the Salesforce mobile application user experience.

Key Topics

This unit prepares you for the mobile section of the Salesforce Platform App Builder exam, which makes up 5% of the overall exam. This section of the exam tests these topics.

- Declarative customizations for the Salesforce mobile app.
- Object specific actions and layouts to optimize user experience.

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you can encounter as a Salesforce Platform App Builder. Looking at these scenarios helps prepare you to take the mobile section of the Salesforce Platform App Builder exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

The unit also contains interactive flashcards centered around study topics that help you prepare for the mobile section of the exam.

Exam Practice Questions

Ready to jump in? The sample tool below is not scored—it's just an easy way to quiz yourself. To use it, read the scenario on the left side, then click on the answer you think is correct. Some questions may have more than one correct answer. Click submit, and you get a pop-up telling you whether the answer you chose is correct or incorrect, and why. When you reach the end, you can review the answers or retake the questions.

Platform App Builder Certification Prep: Business Logic and Reporting

Scenario 1

An App Builder at Universal Containers wants to include a new Visualforce page on the mobile navigation menu. What solution can the App Builder recommend for this requirement?

ANSWER	FEEDBACK
A. ADD THE NEW VISUALFORCE PAGE TO THE SMART SEARCH ITEMS SECTION OF THE NAVIGATION MENU.	Incorrect. Before you can include Visualforce pages, Lightning pages, or Lightning components in the Salesforce app navigation menu, a new tab must be created for them.
B. MOVE THE VISUALFORCE TAB TO THE TOP OF THE NAVIGATION LIST.	Incorrect. Before adjusting the navigation menu, a tab must be created for the Visualforce page and then added to the navigation menu.
C. CREATE A NEW LIGHTNING APP TAB AND INCLUDE THE APP IN THE NAVIGATION MENU.	Incorrect. This does not meet the business requirements because a new Lightning app tab is not needed. Only a new Visualforce tab is needed to be added to the navigation menu.
D. CREATE A NEW VISUALFORCE TAB AND THEN ADD THE TAB TO THE NAVIGATION MENU.	Correct. Before you can include Visualforce pages, Lightning pages, or Lightning components in the Salesforce app navigation menu, a new tab must be created for them.

Did you get a scenario wrong? Check out the table below for related study material.

Scenario 1	Review Customize the Salesforce Mobile App Navigation Menu to learn how to optimize the user experience by customizing the salesforce mobile app.
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Exam Topic Flashcards

Use these interactive flashcards to brush up on some of the key topics you'll find on this part of the exam. Read the question or term on each card, then click on the card to reveal the correct answer. Click the right-facing arrow to move to the next card and the left-facing arrow to return to the previous card.

Question/Term	Answer/Definition
What are three ways an App Builder can customize the mobile app navigation?	<ul style="list-style-type: none">• Add items• Remove items• Reorder items
What two types of quick actions can be used on desktop and mobile interface?	Global and object-specific.

Did you get a flashcard wrong? Check out the table below for related study material.

Flashcard 1	Learn how to declaratively customize the mobile app navigation by studying Personalize the Navigation Bar in Lightning Experience .
Flashcard 2	Study up on Quick Actions to learn what types of actions that can be used on the desktop and mobile interface.

Platform App Builder Certification Prep: Business Logic and Reporting

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 <u>Salesforce Mobile App Customization</u>	Module

Congratulations! You've studied up on user setup. Up next, let's cover standard and custom objects.

Unit 5: Get a Refresh on App Deployment

Learning Objectives

After completing this unit, you'll be able to:

- Describe the key milestones and considerations when managing the application lifecycle.
- Describe the differences between and considerations when using the various types of sandboxes.
- Describe the capabilities of and considerations when using change sets.
- Describe the use cases of and considerations when using unmanaged packages.
- Given a scenario, determine the appropriate deployment plan.

Key Topics

This unit prepares you for the app deployment section of the Salesforce Platform App Builder exam, which makes up 8% of the overall exam. This section of the exam tests these topics.

- Application lifecycle
- Sandboxes purposes
- Change sets
- Packaging types
- App deployment

This unit provides a number of interactive, real-world, scenario-based questions that are a lot like the ones you can encounter as a Salesforce Platform App Builder. Looking at these scenarios helps prepare you to take the app deployment section of the Salesforce Platform App Builder exam. As you tackle the practice questions, you get immediate feedback on your answers, along with detailed information on why your answers are correct (or incorrect).

The unit also contains interactive flashcards centered around study topics that help you prepare for the app development section of the exam.

Exam Practice Questions

Ready to jump in? The sample tool below is not scored—it's just an easy way to quiz yourself. To use it, read the scenario on the left side, then click on the answer you think is correct. Some questions may have more than one correct answer. Click submit, and you get a pop-up telling you whether the answer you chose is correct or incorrect, and why. When you reach the end, you can review the answers or retake the questions.

Platform App Builder Certification Prep: Business Logic and Reporting

Scenario 1

An App Builder at Universal Containers has completed all development for a new sales app. The release manager confirms the change set is ready and notices a number of apex unit tests are included. What is the best way to reduce deployment time to production?

ANSWER	FEEDBACK
A. DEPLOY EACH METADATA COMPONENT INDIVIDUALLY.	Incorrect. Deploying each component individually is not efficient or effective. You can initiate multiple deployments, but only one deployment can run at a time. The other deployments remain in the queue until the current one finishes.
B. PERFORM A QUICK DEPLOY AND ONLY RUN SPECIFIC APEX TESTS.	Correct. All Apex tests are run in production as part of a deployment. Executing all tests can be time-consuming and delay your deployment. Using quick deployments give the ability to deploy and execute specific tests.
C. MANUALLY CREATE THE METADATA IN PRODUCTION.	Incorrect. There is no need to create metadata in production. Development should take place in a sandbox and then the changes are released to production.
D. LOCK USERS FROM LOGGING IN AND PERFORM THE DEPLOY.	Incorrect. Locking users from logging in during the deploy does not improve the time to deploy. It only ensures no data changes or activity will be lost during the deployment.

Platform App Builder Certification Prep: Business Logic and Reporting

Scenario 2

An App Builder at Universal Containers is working on a project that requires them to work with specific metadata and about 2 GB of sample data from production. What sandbox would the App Builder use to meet their requirements?

ANSWER	FEEDBACK
A. PARTIAL COPY	Correct. Partial Copy sandboxes have the data limit of up to 5GB and can be created using specific sandbox templates giving the developer a sandbox with specific metadata and sample data.
B. FULL	Incorrect. The Full sandbox has all metadata and production data whereas the new developer only needs to work with specific metadata and data. The Full sandbox is not ideal for development as that sandbox is used for processes later in the development cycle such as performance testing and staging.
C. DEVELOPER PRO	Incorrect. The Developer Pro sandbox has the size limit of 1GB for data and storage. This sandbox also does not contain any data, only metadata.
D. DEVELOPER	Incorrect. The Developer sandbox has the size limit of 200MB for data and storage. This sandbox also does not contain any data, only metadata.

Platform App Builder Certification Prep: Business Logic and Reporting

Scenario 3

An App Builder at Universal Containers is working on a project that requires them to work with specific Universal Containers is preparing for a hackathon session with the development team. An App Builder needs to share a package of components with many sandboxes at once. What package type can the App Builder use to meet this requirement?

ANSWER	FEEDBACK
A. MANAGED - BETA	Incorrect. Managed packages are typically used by Salesforce partners to distribute and sell applications to customers. Managed packages also prevent destructive changes, like removing objects or fields once installed.
B. MANAGED	Incorrect. Managed packages are typically used by Salesforce partners to distribute and sell applications to customers. Managed packages also prevent destructive changes, like removing objects or fields once installed.
C. UNMANAGED	Correct. Unmanaged packages are typically used to distribute open-source projects to provide developers with the basic building blocks for an application. Once the components are installed, the components can be edited in the organization they are installed in.
D. MANAGED - RELEASED	Incorrect. Managed packages are typically used by Salesforce partners to distribute and sell applications to customers. Managed packages also prevent destructive changes, like removing objects or fields once installed.

Platform App Builder Certification Prep: Business Logic and Reporting

Scenario 4

Which sandbox type is intended to be used for staging and a testing environment?

ANSWER	FEEDBACK
A. FULL SANDBOX	Correct: A Full Sandbox is intended to be used as a staging and testing environment. This sandbox includes a copy of production metadata and sample production data.
B. PARTIAL COPY	Incorrect: This is only a partial copy created with a template. Not all scenarios are able to be tested.
C. DEVELOPER	Incorrect: Developer sandbox only includes a copy of metadata from production.
D. DEVELOPER PRO	Incorrect: Developer Pro is intended for development and testing in an isolated environment. This sandbox only includes metadata from production.

Did you get a scenario wrong? Check out the table below for related study material.

Scenario 1	Identify an appropriate deployment plan by studying how to Monitor Deployments .
Scenario 2	Learn the differences between the various types of sandboxes by studying Sandbox Licenses and Storage by Type .
Scenario 3	Study how to Prepare Your Apps for Distribution to learn when to use different packaging types.
Scenario 4	Identify which sandbox type is ideal to use for staging and testing by studying Sandbox Types and Templates .

Platform App Builder Certification Prep: Business Logic and Reporting

Exam Topic Flashcards

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Question/Term	Answer/Definition
What is one component that is unavailable in a change set?	Account Teams
What is a managed package?	A managed package is a collection of components that are made available to other organizations through the AppExchange.
What is the refresh interval of a Partial Copy Sandbox?	5 days
For new app development, what deployment plan is best practice for the App Builder to follow?	Develop, test, build the release, stage, release

Did you get a flashcard wrong? Check out the table below for related study material.

Flashcard 1	Review the list of Components Available in Change Sets .
Flashcard 2	Study up on Manage Packages to learn the use cases and considerations for using different package types.
Flashcard 3	Learn about the various types of sandboxes and their purposes by studying Sandbox Licenses and Storage by Type .
Flashcard 4	Review the Application Lifecycle and Development Model Trailhead badge to identify the key milestones in the application lifecycle.

Related Badges

Looking for more information? Explore these related badges.

Badge	Content Type
 Change Set Development Model	Module
 Application Lifecycle and Development Models	Module
 Build a Battle Station App	Project
 App Customization Specialist	Superbadge