

Agentforce Master Strategy Guide

Deep Analysis of Recurring Exam Patterns

Synthesized from Notes 1, 2, & 3

CRITICAL SUMMARY

The exam prioritizes **Deterministic Behavior** (controlling the AI) and **Data Cloud Integration**. You must know exactly *when* to use a Flow vs. an Instruction, and *how* to handle stale data in search indexes.

1 Tier 1: High Probability Topics (Must Master)

★ Data Cloud & Indexing Strategy

Questions about Data Cloud are technical and frequent. The key concept is "**Staleness**" vs. "**Structure**".

- **Scenario:** Content (PDFs/Knowledge) changes frequently.
- **Correct Answer:** You must **Rebuild the Search Index**.
- **Wrong Answer:** Do NOT manually delete chunks or assume embeddings update live.
- **Scenario:** Handling PDF Attachments in Knowledge.
- **Configuration:** Enable 'Include Related Attachments' on the Knowledge Object and map the ContentDocumentLink UDMO.
- **Search Types:**
 - **Vector:** For "Natural Language" / "Concepts" (e.g., "How do I fix...").
 - **Keyword:** For "Model Numbers", "SKUs", "IDs".
 - **Hybrid:** The correct answer for *mixed* queries (e.g., "Reset code for device X-99").

★ Logic Control: "Gating" the Agent

The exam tests if you know how to stop the AI from doing things it shouldn't.

- **The "Instructions" Fallacy:** Instructions (e.g., "Please check ID") are *probabilistic*. They might fail.
- **The "Deterministic" Solution:** For security/gates, you must use **Conditional Logic (Filters)**.
 - *Example:* To restrict booking to Premium users, do NOT just tell the LLM. Add a **Conditional Filter** on the Action: `MembershipTier Equals Premium`.
- **Verification Pattern:**
 1. Run a Flow/Action to verify user.
 2. Output a Variable (e.g., `IsVerified = True`).
 3. Gate the next action using that Variable.

2 Tier 2: Exam Traps & Confusing Terms

⚠ EXAM TRAP: Sales vs. Service Agent

The Trap: The scenario describes a customer asking for help (Service), but the *outcome* involves money.

- If the goal is **Upsell**, **New Quote**, or **Opportunity Creation** → **Sales Agent**.
- If the goal is **Resolution**, **FAQ**, or **Ticket Management** → **Service Agent**.
- *Example from Notes:* "Customer wants to upgrade service plan" = **Sales Agent** (even though it's a 'service' request).

⚠ EXAM TRAP: MCP vs. A2A (Connectivity)

These acronyms are often options in the same question.

- **MCP (Model Context Protocol):** Connecting an Agent to an **External Tool/API** (e.g., A predictive model, a weather API, a legacy ERP system). Think "Agent ↔ System".
- **A2A (Agent to Agent):** Connecting an Agent to **Another Agent**. Think "Agent ↔ Agent" (e.g., Service Agent handing off to a specialized Banking Agent).

3 Tier 3: Configuration Specifics (The "Click" Path)

⚙️ Configuration Logic: Prompt Builder Selection

You will be given a user requirement and asked which template to build.

- ✓ **Field Generation:** Populating a *single field* (e.g., "Auto-write the description field").
- ✓ **Record Summary:** Creating a summary of a *whole record* (e.g., "Summarize this Case history").
- ✓ **Flex Template:** The catch-all. Use this for **Custom Actions** or when combining multiple data sources/Flows.
- ✓ **Sales Email:** Specifically for drafting emails.

⚙️ Configuration Logic: Testing Center & Lifecycle

Environment: **Sandbox Only**. Never run the Testing Center in Production.

Data Strategy: Use **Synthetic Utterances** (AI-generated variations) to test pass/fail logic at scale. Do not rely on manual testing alone.

Debugging: Use **Session Tracing** (or "Enrich event logs") to see the full "Reasoning Chain" (why the agent chose Action A over Action B).

4 Quick Revision Checklist

- **Permissions:** Agents need "Run Flows" and "Access Knowledge".
- **Hallucinations:** If URLs are fake, check the Grounding Data quality.
- **Topics:** Agent selects Topic based on *Classification Description*, not Scope.
- **Retriever:** If a field is missing in results, update the Search Index first.
- **Slack:** Install "Agentforce in Slack" app; requires User Mapping.
- **Flows:** Must be active to be used by the Agent.

Good Luck with your Certification!