

# Salesforce Training With AgentForce

The most comprehensive Salesforce course with hands-on labs to build intelligent applications, real-world projects, and certification preparation. From beginner to expert in one complete future-ready programme.

## Salesforce Platform Admin & Agentforce

Master platform administration with AI-powered automation

## Salesforce Apex with Agentforce

Build robust backend solutions with intelligent coding

## Salesforce LWC with Agentforce

Create modern Lightning Web Components

## Salesforce Business Analyst

Drive business transformation through requirements analysis

## Salesforce Testing

Ensure quality with comprehensive testing strategies

## Salesforce Integrations

Connect systems seamlessly across platforms

## Agentforce Sales

Formerly Sales Cloud - AI-powered sales automation

## Agentforce Service

Formerly Service Cloud - intelligent customer support

## Agentforce Marketing

Formerly Marketing Cloud - autonomous campaigns

## Salesforce Data 360

Formerly Data Cloud - unified customer profiles

# Digital Edify

India's First AI-Native Training Institute

Learn AI. Build Agents. Lead Future.

# About Digital Edify

India's #1 Training Institute for the AI Era

**Established:** 2016

**Headquarters:** Hyderabad,  
Telangana

**Reach:** Global (Online + Offline)

## The Transformation Narrative

Digital Edify has evolved from a premium training institute in the Automation Era to an AI-first organisation leading the Agentic AI revolution. Since 2016, we've transformed over 100,000 professionals and built partnerships with more than 1,000 industry leaders. Our journey reflects the technological evolution of our time—from traditional job placement to career transformation, and now to building AI-native professionals who will shape the future of work.



### Automation Era (2016-2023)

Premium Training Institute focused on job placement with 100K+ students trained

### AI Revolution (2024-2025)

AI-Powered Training with industry-AI integration and career transformation focus

### Agentic AI Leadership (2026+)

AI First Institute building AI-Native Professionals with 1 Million AI-Native Vision

"We started in the Automation Era. We evolved through the AI Revolution. Now, we're leading the Agentic AI Future—with 100,000+ professionals already transformed and 1,000+ industry partners trusting our graduates."

## Vision & Mission

### Vision

"To Create 1 Million AI-Native Professionals Who Will Build the Agentic Future of Work"

### Mission

"We transform learners into AI-native professionals through industry-aligned programmes that integrate Agentic AI into every discipline—from development to data science to enterprise platforms."

# Course Highlights

## Section 1: Salesforce Platform Admin

Administer, automate, and optimize Salesforce with security, AI, and analytics.

## Section 2: Salesforce Apex with Agentforce

Build powerful backend logic using Apex, APIs, and AI agents.

## Section 3: Salesforce LWC & JavaScript

Create modern, high-performance UI with LWC and JavaScript.

## Section 4: Salesforce Business Analyst

Convert business needs into agile Salesforce solutions.

## Section 5: Salesforce Testing

Validate quality with Apex, UI, integration, and AI testing.

## Section 6: Salesforce Integrations

Connect Salesforce seamlessly with secure, scalable integrations.

## Section 7: Agentforce Sales

Accelerate sales with AI agents, automation, and insights.

## Section 8: Agentforce Service

Deliver intelligent, omnichannel customer service with AI.

## Section 9: Agentforce Marketing

Run personalized, AI-driven marketing campaigns at scale.

## Section 10: Salesforce Data 360

Unify and activate customer data with AI-powered insights.

## SECTION 1

# Salesforce Platform Admin

## Module 1: Introduction to Salesforce & Modern Admin

Begin your Salesforce journey with a comprehensive introduction to the platform architecture and multi-cloud ecosystem. This module establishes the foundation for understanding how Salesforce operates in the AI era, covering the essential concepts that every modern administrator needs to master.

Explore the revolutionary Agentforce capabilities, including AI agents, Einstein intelligence, and Data Cloud integration. Learn how these technologies are transforming the role of Salesforce administrators and creating new opportunities for career advancement in an AI-powered business landscape.

### Key Learning Outcomes

- Platform architecture fundamentals
- Multi-cloud ecosystem navigation
- Agentforce and Einstein AI
- Developer org configuration
- Admin career pathways



### Platform Architecture

Multi-tenant cloud infrastructure

### AI Integration

Agentforce and Einstein capabilities

### Career Development

Modern admin opportunities

# Organization Setup & Security

## Module 2: Building Secure Foundations

Master the critical aspects of organisation setup and security configuration. This module covers everything from basic org settings to advanced security implementations, ensuring you can create and maintain a secure Salesforce environment that meets enterprise standards.



### Org Configuration

Business hours, fiscal year settings, currencies, and localisation options for global operations



### User Management

Profiles, permission sets, delegated administration, and role-based access control



### Security Framework

MFA, SSO, organisation-wide defaults, role hierarchy, and sharing rules implementation



### Data Protection

Object, field, and record-level security configurations for comprehensive data governance

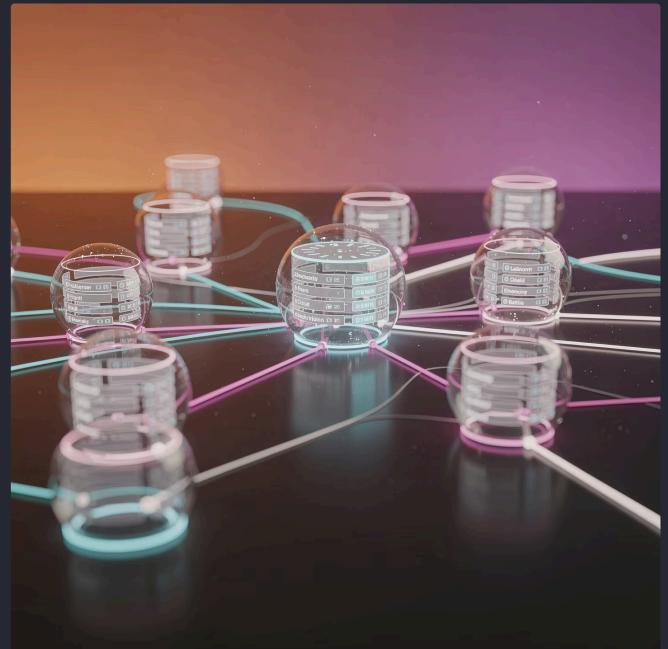
Security is not just a feature—it's the foundation of trust in the Salesforce platform. Every configuration decision impacts your organisation's data protection strategy.

# Data Modeling

## Module 3: Architecting Your Data Structure

Learn to design robust data models that support complex business processes. This module explores standard and custom objects, field types, and relationship structures that form the backbone of your Salesforce implementation.

Master the art of creating formulas, roll-up summaries, and validation rules that ensure data integrity whilst automating business logic. Understand how proper data modelling impacts system performance and user experience.



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01

### Object Design

Standard, custom objects, and schema builder for visual data architecture

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02

### Field Configuration

Field types, formulas, roll-up summaries, and picklist dependencies

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03

### Relationships

Master-detail, lookup, and junction objects for complex data structures

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04

### Page Layouts

Record types, validation rules, and user interface customisation

# Data Management

## Module 4: Maintaining Data Excellence

Develop expertise in data import, export, and quality management. This module covers the essential tools and techniques for maintaining clean, accurate data that powers AI-ready business processes and intelligent automation.

1

### Data Import

Data Import Wizard and Data Loader for bulk operations and complex data migrations

2

### Data Export

Weekly export schedules, manual backup procedures, and data archiving strategies

3

### Quality Management

Duplicate management, validation rules, and data cleansing best practices

4

### AI Readiness

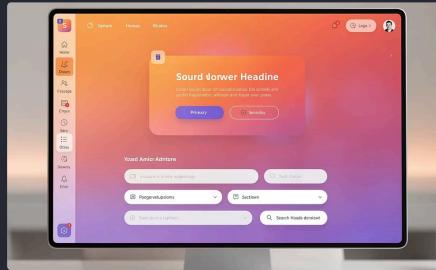
Data completeness, consistency checks, and preparation for intelligent automation

- Pro Tip:** AI-powered features require high-quality, complete data. Invest time in data cleansing and validation to maximise the value of Agentforce capabilities.

# Lightning App Builder

## Module 5: Creating Dynamic User Experiences

Master the Lightning App Builder to create responsive, intuitive user interfaces. Learn to design app pages, home pages, and record pages that adapt to user needs whilst maintaining consistency across desktop and mobile platforms.



### Page Types

App, home, and record pages with dynamic components and flexible layouts



### Dynamic Forms

Field-level visibility, conditional rendering, and action configuration



### Custom Apps

Navigation customisation, branding, and mobile-optimised deployment

The Lightning App Builder empowers administrators to create sophisticated applications without code. Leverage dynamic forms and actions to build intelligent interfaces that respond to user context and business requirements.

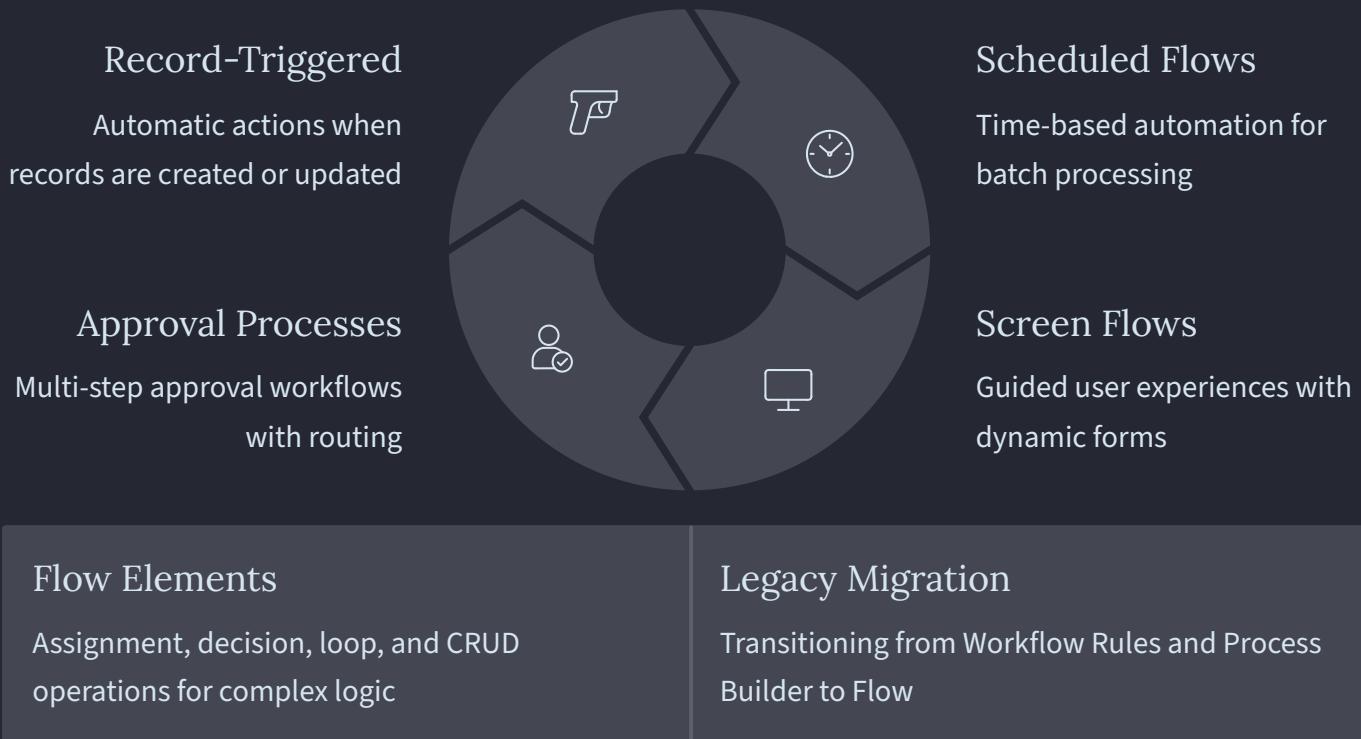
### Key Features

- Drag-and-drop interface
- Component library
- Mobile responsiveness
- Dynamic visibility

# Process Automation

## Module 6: Automating Business Logic

Transform manual processes into automated workflows using Salesforce Flow. This module covers record-triggered flows, scheduled flows, and screen flows that streamline operations whilst ensuring business rules are consistently applied across your organisation.



# Reports & Dashboards

## Module 7: Visualising Business Intelligence

### Report Types

- Tabular reports for lists
- Summary reports with grouping
- Matrix reports for cross-tabulation
- Joined reports for multiple objects

### Advanced Features

- Filters and grouping
- Bucket fields
- Custom formulas
- Dynamic dashboards

Master the art of data visualisation with Salesforce reports and dashboards. Learn to create insightful analytics that drive business decisions, from simple tabular reports to complex matrix reports with custom formulas and bucket fields.

Build dynamic dashboards that provide real-time visibility into key performance indicators. Understand best practices for report design, filtering strategies, and dashboard component selection to deliver actionable insights to stakeholders.

4

20+

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### Report Types

Tabular, summary, matrix, and joined reports for comprehensive analysis

### Dashboard Components

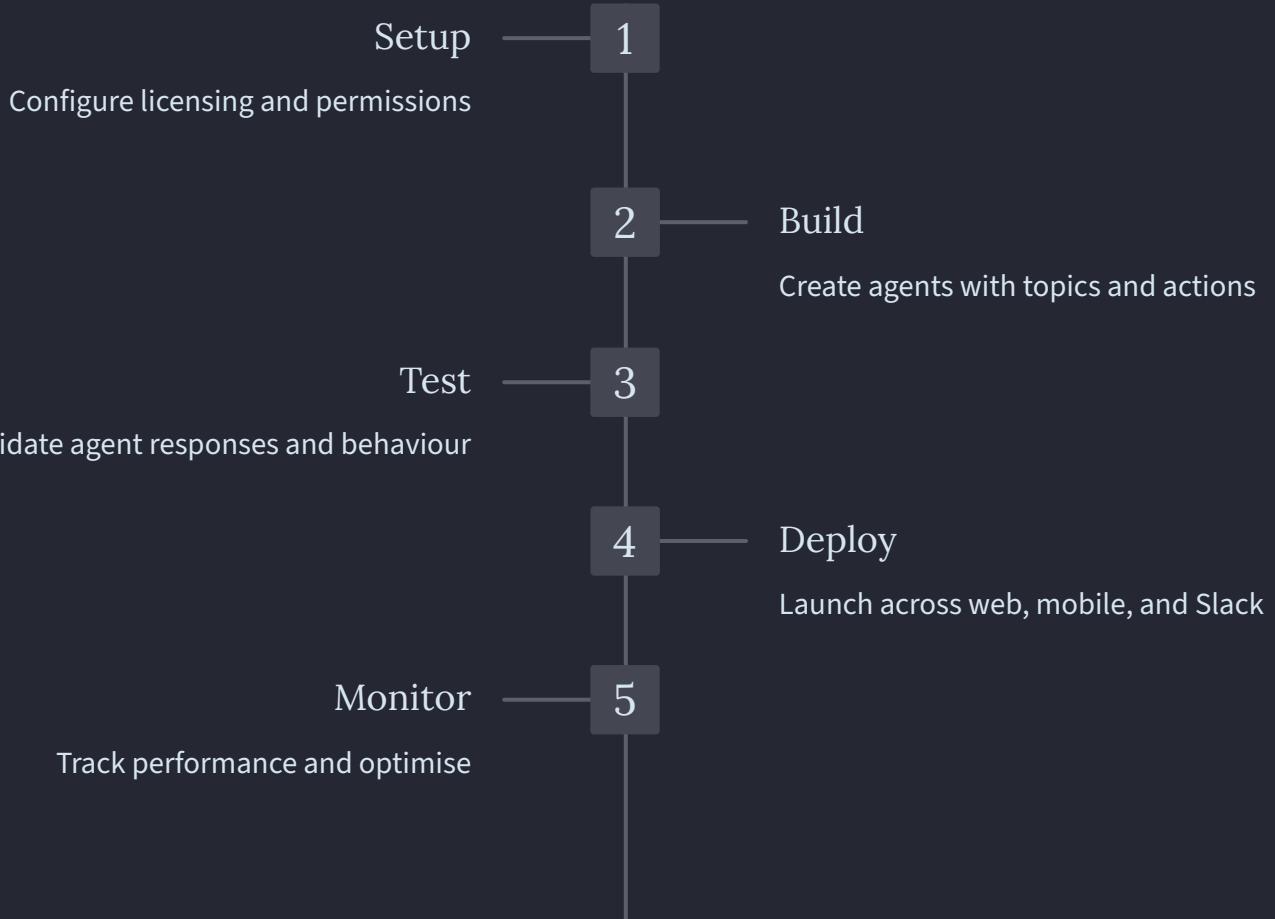
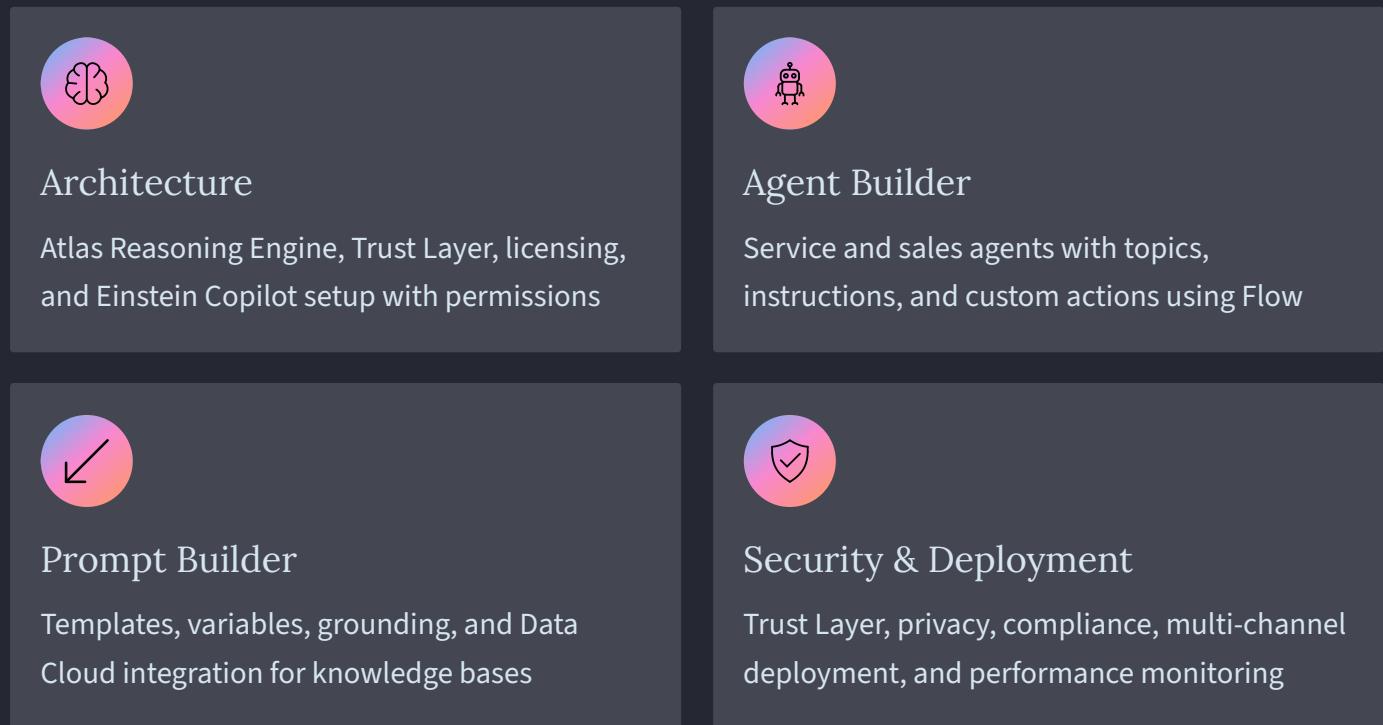
Charts, tables, metrics, and gauges for visual storytelling

### Customisation Options

Unlimited flexibility with filters, formulas, and grouping

# AI & Agentforce

## Module 8: Implementing Intelligent Automation



# DevOps & Deployment

## Module 9: Managing the Development Lifecycle

Master the tools and techniques for managing changes across Salesforce environments. Learn sandbox strategies, change set deployment, and modern DevOps practices using DevOps Center for Git-based development and automated pipelines.

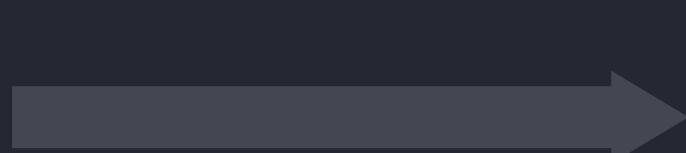


### Sandbox Management

Developer, Developer Pro, Partial Copy, and Full sandboxes for different testing needs

### Change Sets

Deployment connections, inbound and outbound change sets, and dependency management



### DevOps Center

Git-based development, automated pipelines, and version control integration

### Testing & Release

UAT, regression testing, test data management, and release monitoring

### Sandbox Types

Choose the right environment for development, testing, and training purposes

### Deployment Tools

Change sets, DevOps Center, and metadata API for reliable deployments

### Best Practices

Version control, testing strategies, and release management protocols

# Productivity & Excellence

## Module 10: Achieving Admin Mastery

Complete your admin journey with advanced productivity features and certification preparation. This module covers collaboration tools, email integration, content management, and performance optimisation techniques that distinguish exceptional administrators.



### Chatter & Collaboration

Social collaboration, groups, feeds, and real-time communication across teams



### Activity Management

Tasks, events, calendar integration, and email synchronisation with Outlook and Gmail



### Content Management

Files, libraries, content delivery, and document version control



### AppExchange

Managed packages, app installation, and third-party solution integration

### Performance Optimisation

Best practices for maintaining system performance, query optimisation, and resource management

### Certification Preparation

Comprehensive exam readiness with practice questions, study guides, and capstone project

The capstone project brings together everything you've learned, challenging you to build an end-to-end Salesforce org with AI agent integration—demonstrating real-world admin excellence.

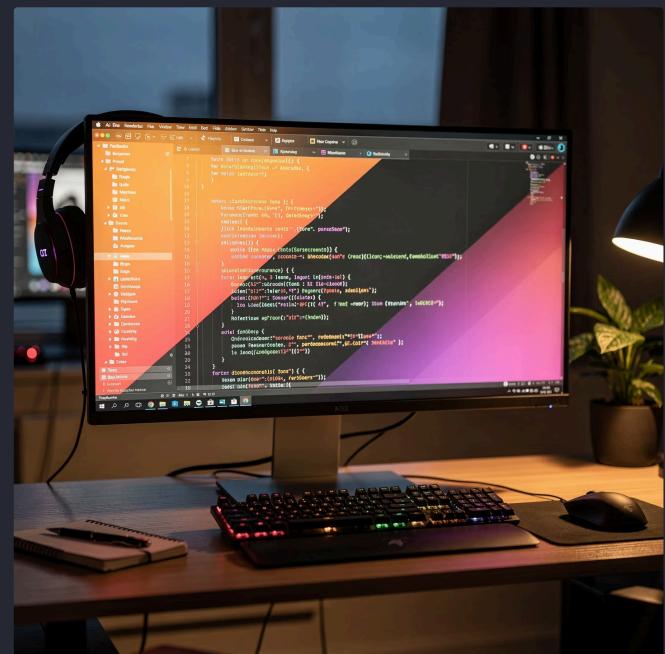
# Salesforce Apex With Agentforce

## Module 1: Force.com Platform & Apex Fundamentals

Begin your Apex development journey with a solid foundation in the Force.com platform and programming basics. This module introduces the platform's architecture, covering SaaS, PaaS, and IaaS concepts whilst establishing essential programming skills.

Master Apex syntax, data types, and variables.

Learn access modifiers that control code visibility and security. Understand operators, expressions, and control flow structures that form the building blocks of robust Salesforce applications.



1

### Platform Basics

Force.com architecture and cloud computing models

2

### Apex Syntax

Data types, variables, and access modifiers

3

### Control Flow

Conditional statements and loop structures

#### Private Access

Restricts visibility to the defining class only

#### Public Access

Available within the namespace or application

#### Global Access

Accessible across all namespaces and managed packages

# Collections & Data Structures

## Module 2: Managing Complex Data

Develop expertise in Apex collections—the fundamental data structures for managing groups of records and values. This module covers Lists, Sets, and Maps, teaching you when and how to use each collection type for optimal performance and code clarity.

### List Collections

Ordered collections with declaration, initialisation, and methods for adding, removing, and accessing elements

### Set Collections

Unordered collections of unique values with methods for set operations and duplicate prevention

### Map Collections

Key-value pairs with iteration techniques and methods for efficient data lookup and retrieval

Master nested collections for complex data structures. Learn best practices for collection usage, including performance optimisation techniques that prevent governor limit violations. Understand when to use each collection type based on your specific use case and data access patterns.

### Performance Tips

- Use Maps for lookups
- Sets for uniqueness
- Lists for ordered data
- Avoid nested loops
- Bulkify operations

# DML Operations & Database Management

## Module 3: Manipulating Salesforce Data

Master Data Manipulation Language (DML) operations for creating, updating, and deleting Salesforce records. This comprehensive module covers all DML operations, exception handling, and the Database class methods that provide fine-grained control over data operations.



**Exception Handling**  
DML exception types, error messages, and graceful failure management strategies

**Database Class**  
Partial success with allOrNone parameter, Database.insert, update, delete methods

**Governor Limits**  
Understanding limits, bulkification patterns, and best practices for large data volumes

# SOQL & SOSL Queries

## Module 4: Querying Salesforce Data

### SOQL Fundamentals

Salesforce Object Query Language enables precise data retrieval with SELECT statements, WHERE clauses, and field selection. Master filtering, ordering, and limiting results for efficient queries.

### Advanced Features

Aggregate functions (COUNT, SUM, AVG, MIN, MAX), GROUP BY clauses, HAVING conditions, and date functions provide powerful analytical capabilities.



### SOQL

Structured queries for specific objects with precise filtering and relationship traversal

### SOSL

Full-text search across multiple objects for finding records by keyword

01

#### SELECT Statements

Choose fields and objects to retrieve

02

#### WHERE Clauses

Filter records based on conditions

03

#### ORDER & LIMIT

Sort results and control record count

04

#### Aggregate Functions

Calculate summaries and statistics

- When to Use Each: Use SOQL when you know the object and need precise filtering. Use SOSL when searching across multiple objects or performing text-based searches.

# Relationship Queries & Advanced SOQL

## Module 5: Navigating Object Relationships

Master the art of querying related records in Salesforce. This module covers parent-to-child and child-to-parent queries for both standard and custom objects, enabling you to retrieve complex data structures efficiently whilst respecting governor limits.



### Parent-to-Child

Query child records from parent using subqueries

### Child-to-Parent

Access parent fields from child records using dot notation

### Multi-Level

Traverse multiple relationship levels in single query

#### Standard Objects

Parent-to-child and child-to-parent queries using standard relationship names like Contacts, Opportunities

#### Custom Objects

Relationship queries with `__r` suffix for custom relationships and junction objects

#### Polymorphic

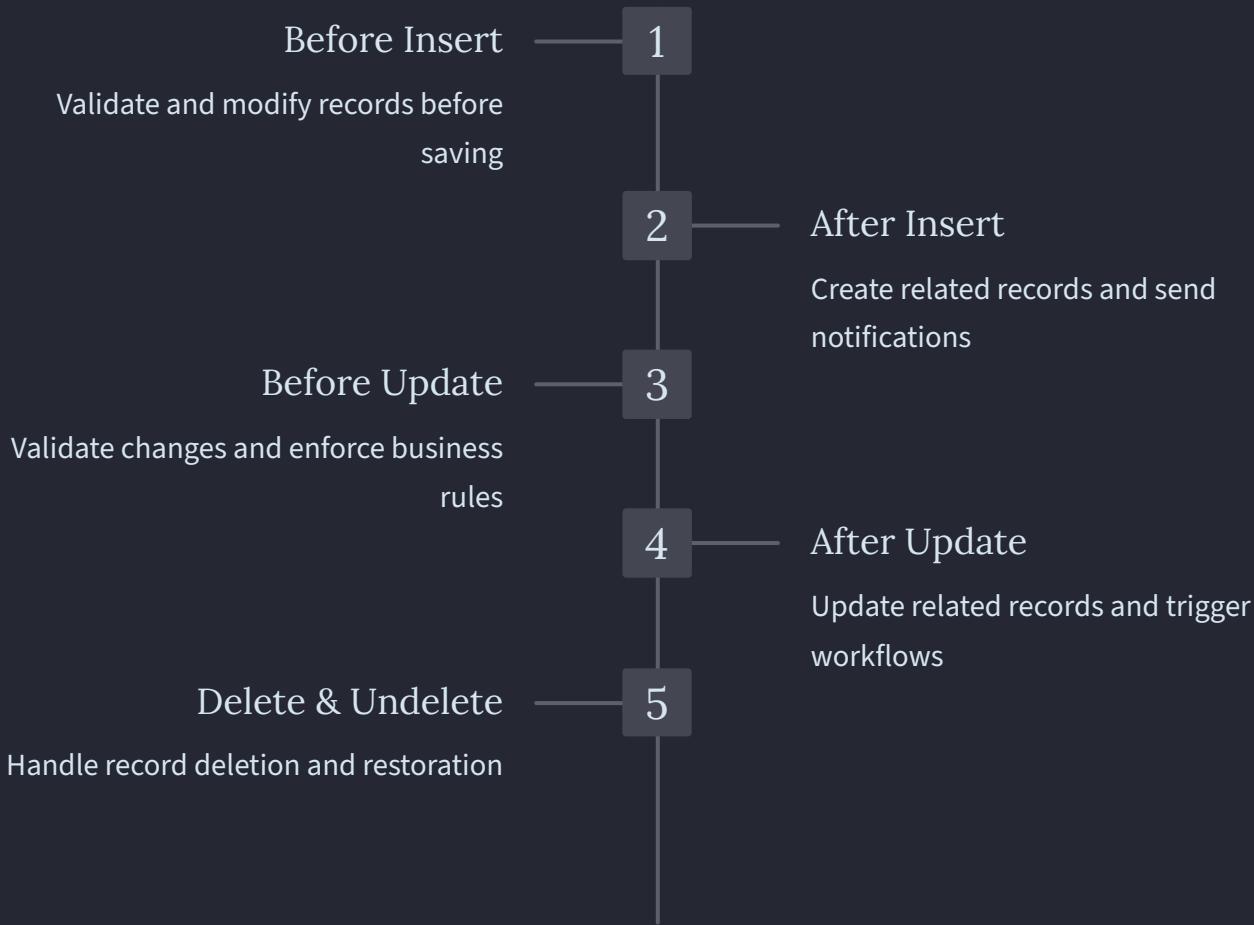
Queries on fields that reference multiple object types like Owner or What fields

#### Optimisation

Query performance tuning, selective filters, and indexed field usage for large data volumes

# Apex Triggers & Trigger Framework

## Module 6: Automating Business Logic



### Context Variables

- Trigger.new - New record values
- Trigger.old - Old record values
- Trigger.newMap - New records by ID
- Trigger.oldMap - Old records by ID
- Trigger.isInsert, isUpdate, etc.

### Best Practices

- One trigger per object
- Use handler classes
- Bulkify all operations
- Prevent recursion
- Follow order of execution

### Trigger Framework

Implement handler classes, helper methods, and design patterns for maintainable, scalable trigger architecture

### Recursion Prevention

Static variables, flags, and techniques to prevent infinite trigger loops and stack overflow errors

# Apex Classes, Methods & OOP

## Module 7: Object-Oriented Programming

Master object-oriented programming principles in Apex. This comprehensive module covers classes, methods, constructors, inheritance, polymorphism, and interfaces—essential concepts for building maintainable, reusable code that follows industry best practices.



### Classes & Objects

Fundamental building blocks of OOP



### Methods

Instance and static methods with overloading



### Inheritance

Code reuse through parent-child relationships



### Interfaces

Contracts for implementing classes



### Exception Handling

Try-catch-finally and custom exceptions

1

#### Constructors

Default and parameterised constructors for object initialisation

2

#### Polymorphism

Abstract classes, virtual methods, and method overriding

3

#### Inner Classes

Wrapper classes, enums, and nested class structures

# Asynchronous Apex & Integration

## Module 8: Beyond Synchronous Processing

Expand your capabilities with asynchronous Apex and integration patterns. Learn to handle long-running operations, external callouts, and API integrations using Future methods, Batch Apex, Queueable Apex, and Scheduled Apex.



### Future Methods

@future annotation for asynchronous processing and callouts with separate governor limits



### Batch Apex

Database.Batchable interface for processing large data volumes in chunks



### Queueable Apex

System.Queueable for chaining jobs and complex asynchronous logic



### Scheduled Apex

Schedulable interface for time-based automation and recurring jobs

## REST Integration

HTTP callouts, JSON parsing, REST API consumption, and RESTful web service creation with @RestResource annotation

## SOAP Integration

WSDL consumption, SOAP callouts, WebService keyword, and authentication patterns for enterprise systems

1

### Platform Events

Event-driven architecture for real-time integration

2

### Authentication

OAuth, API keys, and security best practices

# Testing, Debugging & Deployment

## Module 9: Ensuring Code Quality

Master the essential skills of testing and debugging Apex code. This module covers test class creation, achieving the required 75% code coverage, and deployment best practices using Salesforce DX and CI/CD pipelines.

01

### Test Fundamentals

@isTest annotation, test methods, and test data creation patterns

02

### Test Data

@testSetup, test data factory, and System.assert methods

03

### Coverage Analysis

Achieving 75% requirement and testing all code paths

04

### Mock Callouts

HttpCalloutMock for testing integrations without external dependencies

### Debugging Tools

Debug logs, Developer Console, VS Code debugging, and log analysis techniques

### Deployment

Change sets, Metadata API, Salesforce DX, and CI/CD with GitHub Actions or Jenkins

Learn best practices for test code organisation, including testing triggers, classes, controllers, and asynchronous Apex. Master the art of writing maintainable tests that provide confidence in your code whilst meeting Salesforce's strict coverage requirements.

### Coverage Target

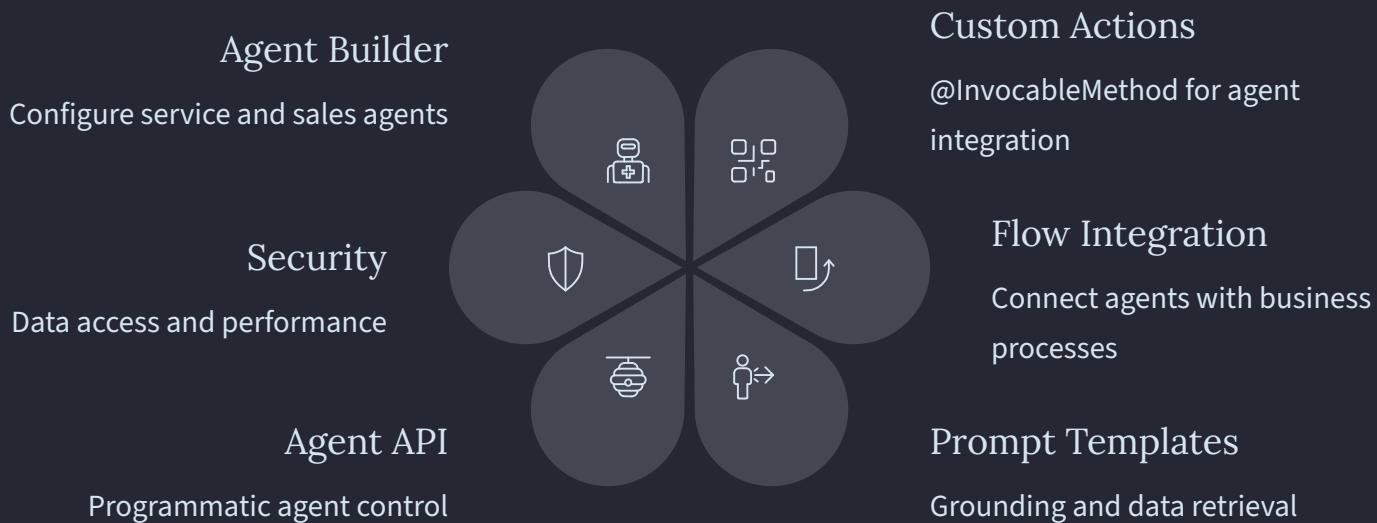
75%

Minimum required

# Agentforce Integration & AI Development

## Module 10: Building AI-Powered Solutions

Transform your Apex skills with Agentforce integration. This cutting-edge module teaches you to build custom actions for AI agents, integrate with Einstein GPT, and create intelligent automation that leverages natural language processing and generative AI capabilities.



### Einstein GPT

Integration with generative AI, prompt engineering best practices, and AI model configuration

### Real-World Projects

Customer service agents, sales assistants, business process automation, and analytics monitoring

Agentforce represents the future of Salesforce development—where AI agents work alongside your Apex code to deliver intelligent, autonomous business solutions.

# Salesforce LWC & JavaScript

## Module 1: HTML Fundamentals for Salesforce

1

### Document Structure

HTML syntax, elements, and proper document organisation

2

### Content Elements

Text, lists, links, images, media, tables, and forms

3

### Semantic HTML5

Modern elements for meaningful structure and SEO

4

### Accessibility

A11y basics, ARIA attributes, and inclusive design

## Module 2: CSS & Lightning Design System

Master CSS styling and the Salesforce Lightning Design System (SLDS). Learn to create responsive, beautiful interfaces using CSS fundamentals, Flexbox, Grid, and SLDS utility classes that ensure consistency with Salesforce's design language.



### CSS Fundamentals

Syntax, selectors, properties, box model, backgrounds, borders, and shadows



### Layout Systems

Display properties, positioning, Flexbox, CSS Grid, and responsive design with media queries



### SLDS Integration

Lightning Design System utility classes, components, and Shadow DOM styling techniques



### Advanced CSS

Animations, transitions, transforms, and modern CSS features for engaging interfaces

# JavaScript Fundamentals - ES6+

## Module 3: Modern JavaScript for LWC

Develop strong JavaScript skills with ES6+ features essential for Lightning Web Components. This module covers variables, data types, functions, arrays, objects, and modern JavaScript syntax that powers interactive Salesforce applications.

<b>Variables &amp; Types</b> var, let, const declarations, data types, operators, and conditional logic	<b>Functions</b> Declarations, expressions, arrow functions, and modern function patterns	<b>Arrays &amp; Objects</b> Methods, iteration, manipulation, properties, destructuring, and spread operator
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## Module 4: Advanced JavaScript Concepts

Master advanced JavaScript patterns including asynchronous programming, promises, async/await, classes, and modules. Learn the sophisticated concepts that enable complex Lightning Web Component functionality and seamless API integration.



### Higher-Order Functions

Closures, callbacks, and functional programming patterns for elegant, reusable code

### Data Handling

JSON parsing, LocalStorage, SessionStorage, and client-side data management

# Modern JavaScript Tools & Workflow

## Module 5: Professional Development Environment

Set up a professional JavaScript development workflow. This module covers Node.js, npm, code quality tools, version control with Git, and debugging techniques that prepare you for enterprise-level Salesforce development.



### Node.js & npm

Package management and JavaScript runtime environment



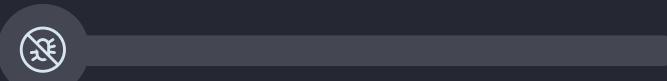
### Code Quality

ESLint and Prettier for consistent, error-free code



### Version Control

Git fundamentals and GitHub collaboration workflows

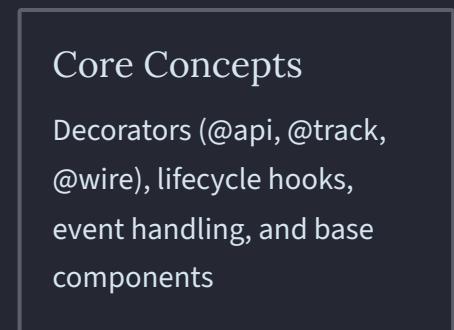


### Debugging

Chrome DevTools and VS Code debugging techniques

## Module 6: Introduction to Lightning Web Components

Begin your LWC journey with platform fundamentals. Learn what Lightning Web Components are, how they differ from Aura, and the web standards they're built upon. Set up your Salesforce DX environment and create your first component.



# LWC Component Development

## Module 7: Building Interactive Components



### Data Binding

Reactive properties, @api decorator, getters, and computed values for dynamic interfaces



### Conditional Rendering

if:true, if:false, lwc:if, lwc:elseif, lwc:else for dynamic content display



### List Rendering

for:each and iterator directives for displaying collections efficiently



### Forms & Validation

Input handling, validation patterns, and user feedback mechanisms



### Component Events

Creating and dispatching custom events



### Parent-Child

Communication patterns and data flow



### Composition

Slots and dynamic components (lwc:dynamic)

## Module 8: Working with Salesforce Data

1

2

3

4

### Lightning Data Service

Wire service and LDS fundamentals

### Wire Adapter

getRecord,  
getRecords,  
getFieldValue

### Apex Integration

@AuraEnabled  
methods and wire  
Apex

### Data Operations

Create, update,  
delete with LDS

# Advanced LWC Patterns

## Module 9: Enterprise-Grade Components

Elevate your LWC skills with advanced patterns for component communication, navigation, and third-party library integration. Learn Lightning Message Service, platform events, and security best practices for production-ready applications.



### Communication Patterns

Master Lightning Message Service for cross-component communication, create and deploy message channels, and implement publish-subscribe patterns for loosely coupled architectures.

### Navigation & Integration

Navigate to records, objects, and list views. Handle URL parameters with CurrentPageReference. Integrate third-party JavaScript libraries securely using static resources.

# LWC Testing & Agentforce Integration

## Module 10: Production-Ready Development

Complete your LWC mastery with comprehensive testing, debugging, deployment, and Agentforce integration. Learn Jest testing, DevOps practices, and how to build AI-powered components that leverage Salesforce's intelligent automation platform.

01

### Jest Testing

@salesforce/sfdx-lwc-jest setup, test writing, and coverage requirements

02

### Test Scenarios

Component rendering, user interactions, wire adapters, and Apex calls

03

### Debugging

Chrome DevTools, VS Code debugging, and log analysis

04

### Deployment

Salesforce DX, DevOps Center, and CI/CD pipelines

### Agentforce Integration

Build AI-powered LWC components, call Agentforce actions, integrate Einstein Copilot, and display AI responses

### Winter '26 Features

Lightning Out 2.0 for external apps, Trusted Mode for browser APIs, LWC in Screen Flows

### Production Readiness

Performance testing, security review, accessibility audit, cross-browser and mobile testing

The future of Salesforce development combines Lightning Web Components with Agentforce AI—creating intelligent, responsive applications that adapt to user needs in real-time.

#### SECTION 4

# Salesforce Business Analyst

## Module 1: Foundations of Business Analysis

1

### BA Role

Modern business analyst responsibilities and career pathways

2

### Agile & Scrum

Framework, roles, events, artifacts, and ceremonies

3

### User Stories

Epics, themes, acceptance criteria, and backlog management

4

### GenAI Tools

AI-powered requirements and documentation

## Module 2: Stakeholder Collaboration & Discovery



### Stakeholder Analysis

Power/Interest Grid, Influence/Impact Matrix, and RACI Matrix for effective engagement



### User Personas

Creating detailed personas and empathy maps to understand user needs and motivations



### Agile Interviews

Discovery, contextual, and stand-up interviews for continuous requirements gathering



### Workshops

Facilitation techniques, surveys, and GenAI for stakeholder management

# Requirements Elicitation & Prioritisation

## Module 3: Capturing What Matters

Critical

Must-have features for launch

High Priority

Should-have features for success

Medium Priority

Could-have features for enhancement

Low Priority

Won't-have features for this release

MoSCoW Method

Must have, Should have,  
Could have, Won't have  
prioritisation for clear  
stakeholder communication

WSJF Scoring

Weighted Shortest Job First  
for Agile prioritisation based  
on cost of delay and job  
duration

RICE Model

Reach, Impact, Confidence,  
Effort scoring for data-driven  
prioritisation decisions

## Module 4: Process Analysis & Value Streams



BPMN

Business Process Modeling Notation



As-Is/To-Be

Current and future state mapping



Value Streams

Identifying waste and bottlenecks



Automation

Opportunities for efficiency gains

# Business & Functional Requirements

## Module 5: Documenting Solutions

BRD	FDD	NFRs
Business Requirements Document capturing high-level business needs and objectives	Functional Design Document detailing system behaviour and user interactions	Non-Functional Requirements for performance, security, and scalability

01

### User Story Mapping

Convert user stories to detailed functional requirements

02

### Integration Scenarios

API requirements and system integration specifications

03

### Data Modeling

Schema design and data relationship documentation

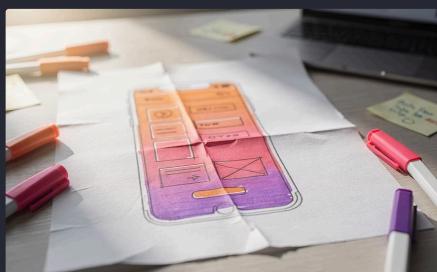
04

### Traceability

Requirements Traceability Matrix linking requirements to objectives

- ❑ **GenAI Advantage:** Use generative AI to accelerate requirements documentation, ensure consistency, and generate comprehensive requirement sets from user stories and process maps.

## Module 6: Prototyping & Solution Design



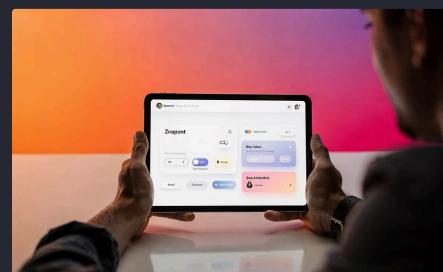
### Wireframing

Low-fidelity layouts showing structure and content placement



### Mockups

High-fidelity designs with colours, typography, and branding

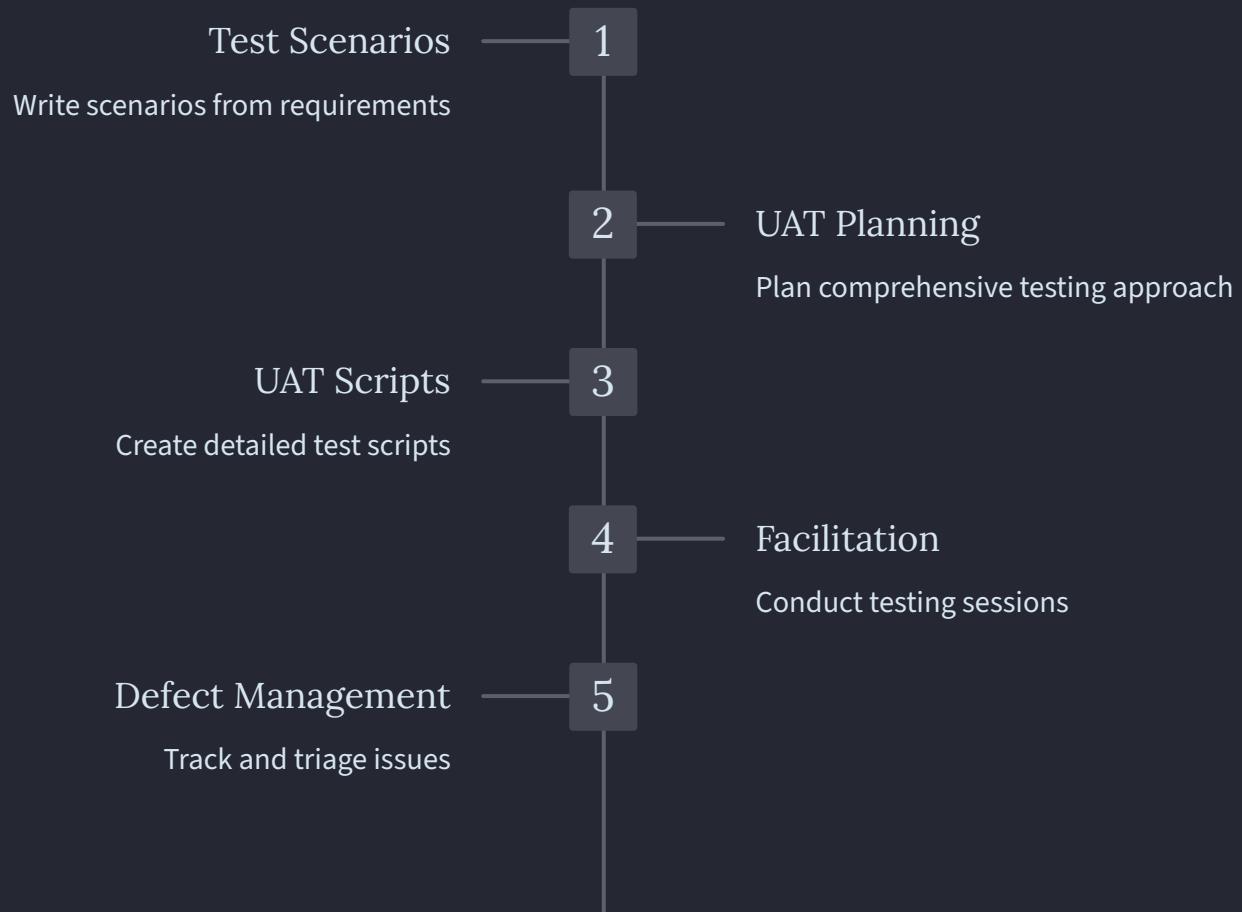


### Prototypes

Interactive models for usability testing and stakeholder validation

# Testing, Training & Change Management

## Module 7: Agile Testing Strategy & UAT



## Module 8: Training & Change Management

Ensure successful adoption with effective training and change management. This module covers communication planning, training material creation, user adoption strategies, and resistance management that drive organisational transformation.

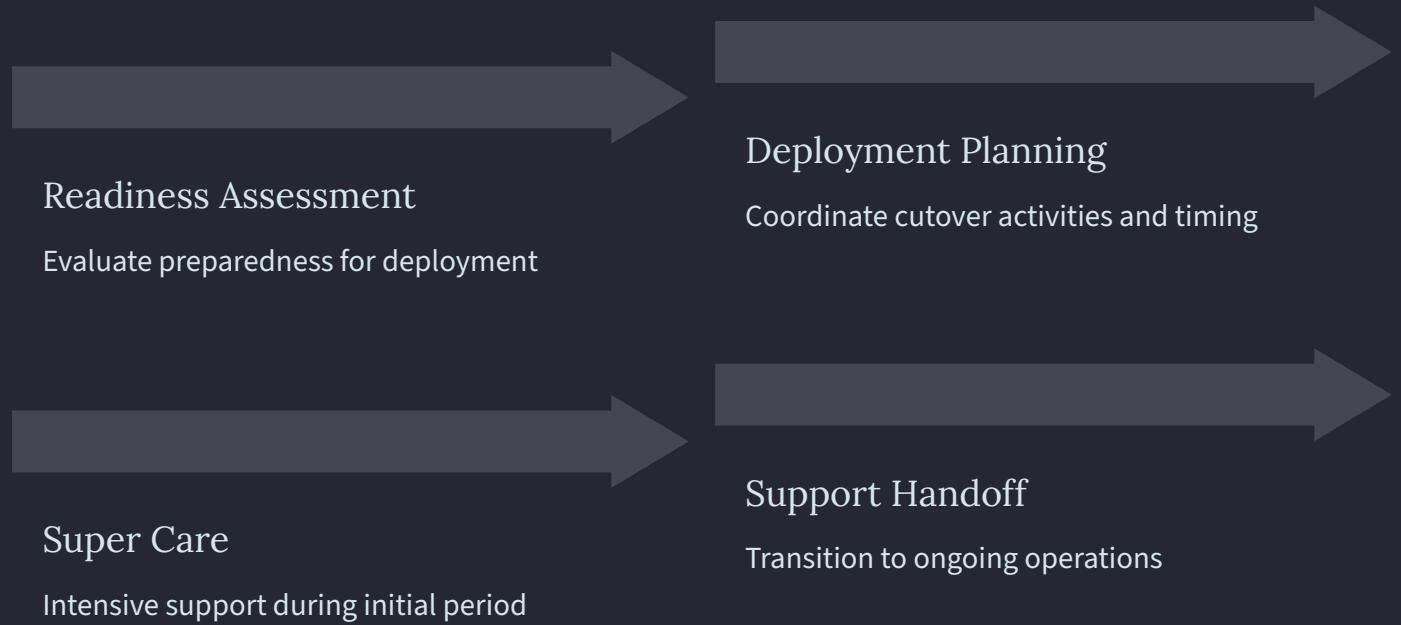
Change Management  
Fundamentals, stakeholder communication planning, and resistance management strategies

Training Materials  
Creating documentation, conducting sessions, and GenAI for content creation

User Adoption  
Strategies for driving engagement, communication cadence, and channel selection

# Module 9: Go-Live & Production Support

Navigate the critical go-live phase with confidence. Learn readiness assessment, deployment planning, cutover strategy, super care period planning, and production support handoff that ensure smooth transitions to live operations.



# Continuous Improvement & BA Excellence

## Module 10: Data-Driven Insights & Career Growth

Complete your BA journey with continuous improvement practices and career development strategies.

Learn to measure business value, define KPIs, analyse data, and leverage GenAI for insights that drive ongoing optimisation and professional growth.

360°

10+

∞

Business Value

KPI Types

Improvement

Comprehensive measurement of project impact and ROI

Diverse metrics for tracking success across dimensions

Continuous optimisation through retrospectives and feedback

### Data Analysis

SQL basics, Power BI, Tableau for reporting, and GenAI for data analysis

### Process Optimisation

Retrospectives, feedback loops, and continuous improvement methodologies

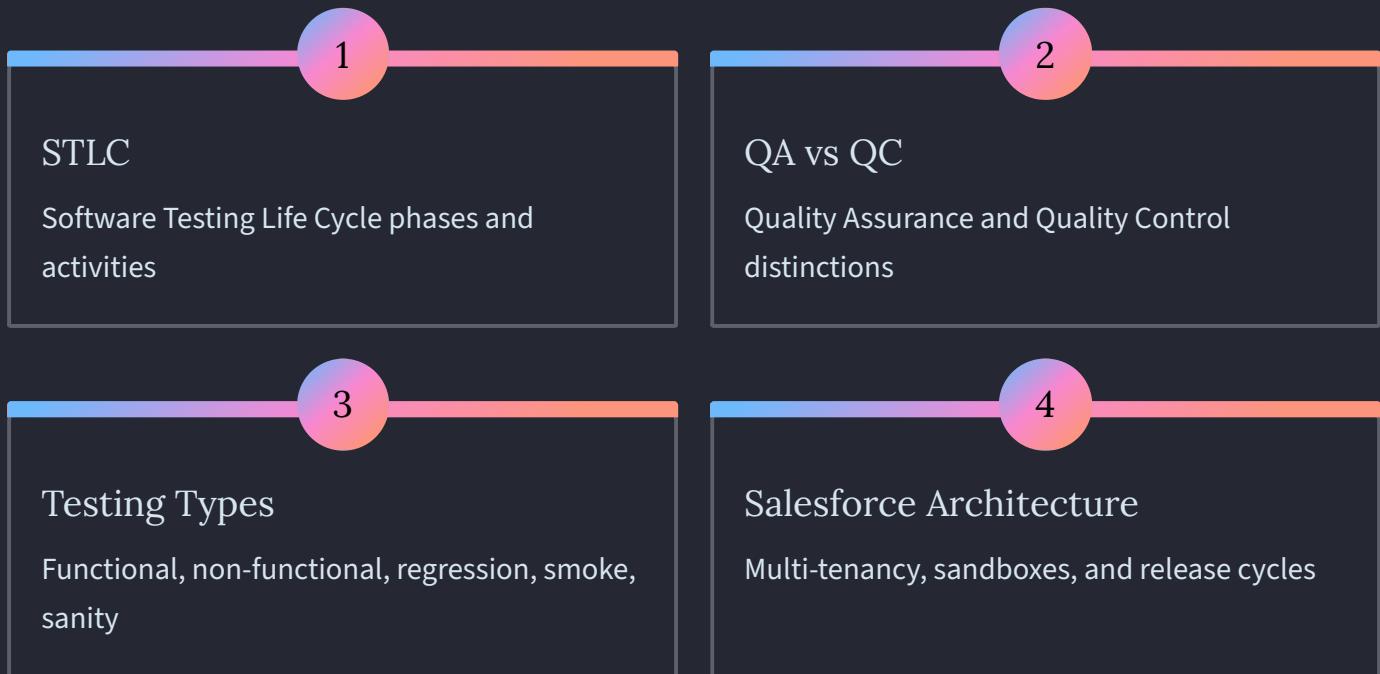
### Career Growth

BA specialisations, certifications, and professional development pathways

The modern business analyst combines traditional requirements skills with data analysis, AI tools, and change management—becoming a strategic partner in digital transformation.

# Salesforce Testing

## Module 1: Salesforce Testing Fundamentals



## Module 2: Apex Testing & Code Coverage

Coverage Target

**75%**

Minimum required for deployment

Write comprehensive test classes using @isTest annotation and @testSetup for efficient test data creation. Master the test data factory pattern for reusable, maintainable test code. Learn to test batch, scheduled, queueable, and @future Apex methods.

Understand mock HTTP callouts using HttpCalloutMock for testing integrations without external dependencies. Develop skills in test code refactoring and maintenance for long-term quality.

### Test Classes

@isTest annotation, test methods, System.assert, and test data factory patterns

### Advanced Testing

Triggers, controllers, batch, scheduled, queueable, @future, and integration testing

# UI, Integration & Performance Testing

## Module 3: UI & Lightning Component Testing

Develop expertise in testing Salesforce user interfaces. This module covers manual UI testing, Lightning Web Component testing with Jest, and UI test automation using Selenium WebDriver and professional tools like Provar and Copado.



## Module 4: Integration, Security & Performance

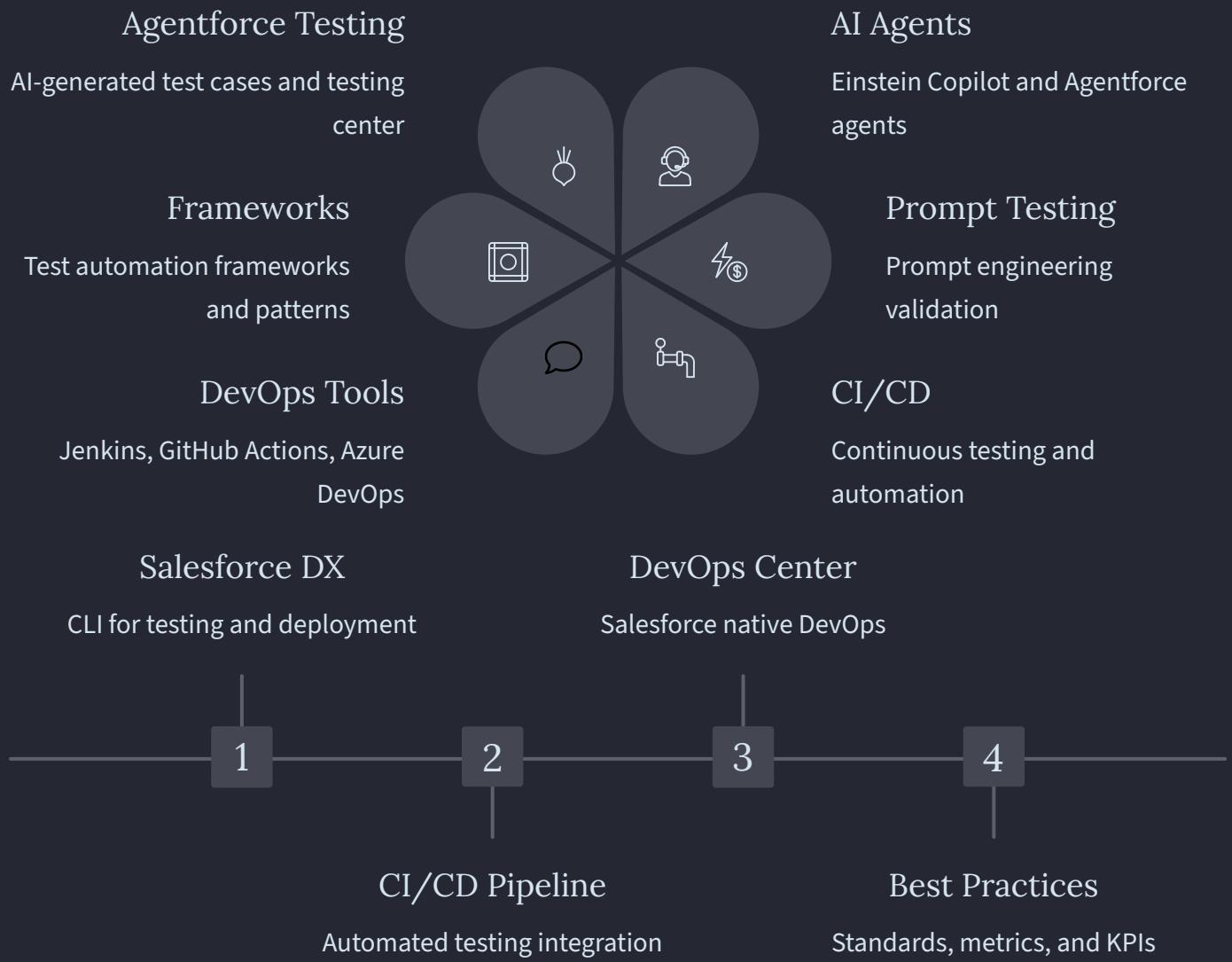
Master testing for integrations, security configurations, and system performance. Learn API testing with Postman, security testing for profiles and permissions, and performance testing with JMeter whilst understanding Salesforce governor limits.

 <p><b>Integration Testing</b> REST, SOAP, third-party apps, data migration, ETL processes, and Postman API testing</p>	 <p><b>Security Testing</b> Profiles, permission sets, OWD, sharing rules, FLS, OWASP vulnerabilities, static code analysis</p>	 <p><b>Performance Testing</b> JMeter, LoadRunner, governor limits, query optimisation, UAT, and regression strategies</p>
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# Agentforce Testing & CI/CD

## Module 5: AI Testing & Advanced Topics

Complete your testing mastery with Agentforce Testing Center, AI-generated test cases, and CI/CD integration. Learn to test AI agents, Einstein features, and implement continuous testing in automated pipelines for modern DevOps workflows.



### Advanced Topics

Multi-org testing, multi-cloud scenarios, AppExchange package testing, and emerging trends in AI-powered testing and shift-left methodologies.

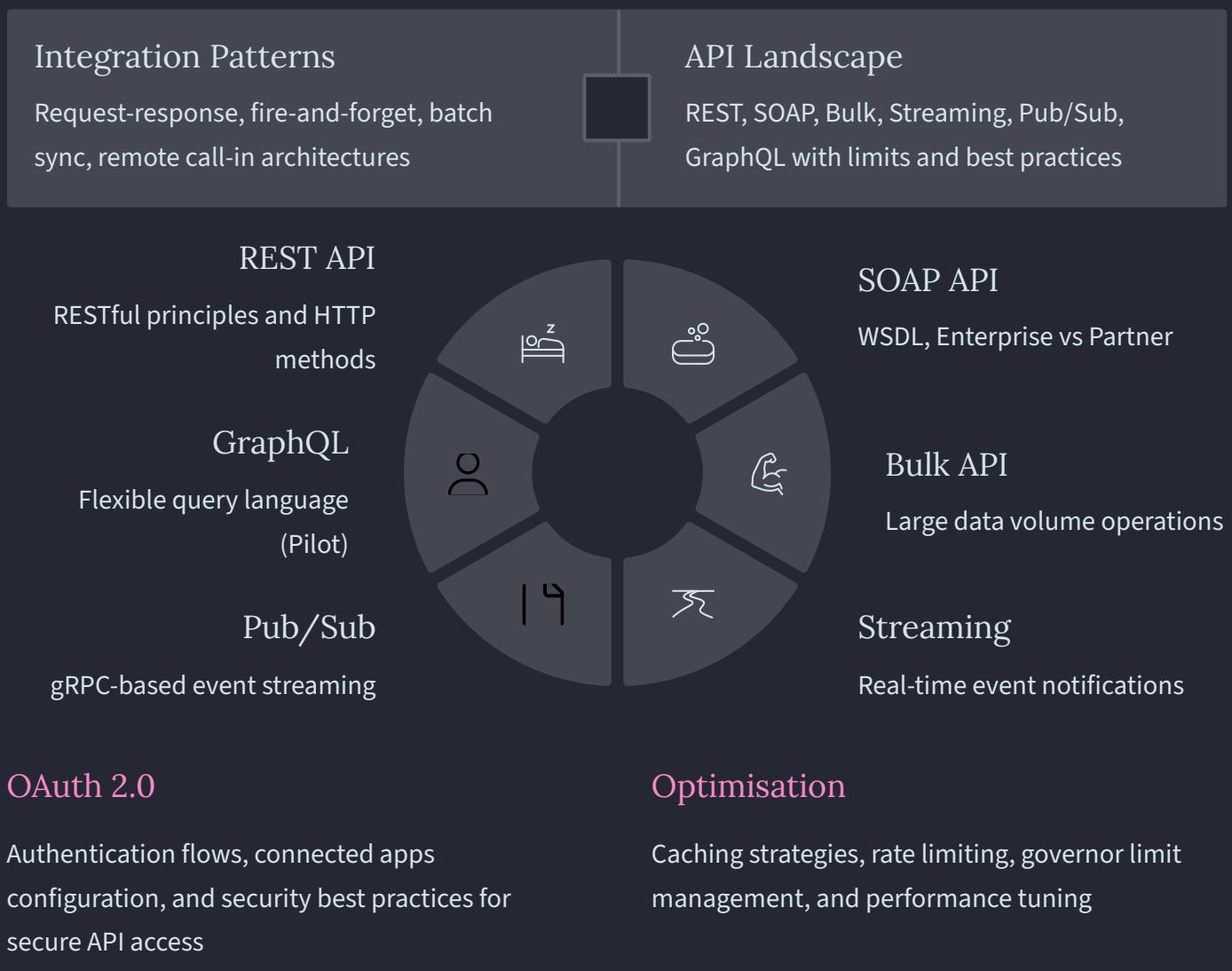
### Certification Prep

Comprehensive preparation for Salesforce testing certifications with practice questions and real-world scenarios.

# Salesforce Integrations

## Module 1: Integration Fundamentals & APIs

Master the foundations of Salesforce integration. This comprehensive module covers integration patterns, API-led connectivity, and Salesforce's complete API landscape including REST, SOAP, Bulk, Streaming, Pub/Sub, and GraphQL APIs.



# Advanced APIs & Integration Patterns

## Module 2: Mastering Salesforce APIs

Dive deep into advanced API capabilities. This module covers REST API endpoints, SOQL/SOSL via REST, SOAP API WSDL, Bulk API 2.0 architecture, Platform Events, Change Data Capture, and Pub/Sub API for comprehensive integration solutions.



### REST API Deep Dive

Endpoints, CRUD, composite resources

### SOAP API Deep Dive

WSDL, Enterprise vs Partner APIs

### Bulk API 2.0

Jobs, operations, error handling

### Platform Events

Publishing, subscribing, and event-driven architecture for real-time integration patterns

### Change Data Capture

CDC for tracking record changes and streaming updates to external systems

### Streaming API

PushTopics for real-time notifications and Pub/Sub API for gRPC-based streaming

01

#### Pattern Selection

Choose appropriate integration pattern

02

#### API Implementation

Implement using selected API type

03

#### Error Handling

Build resilient error management

04

#### Testing

Validate integration functionality

# Apex Integration & Custom APIs

## Module 3: Building Custom Integration Solutions



### Apex REST API

@RestResource, HTTP methods (@HttpGet, @HttpPost, @HttpPut, @HttpPatch, @HttpDelete)



### Apex SOAP API

webService keyword, WSDL generation, and SOAP service development



### Outbound Callouts

HTTP classes (Http, HttpRequest, HttpResponse), REST and SOAP callouts



### Named Credentials

Secure callout configuration, authentication, and asynchronous patterns

## URL Mapping

Path parameters, query strings, and RESTful URL design for intuitive API endpoints

## JSON Handling

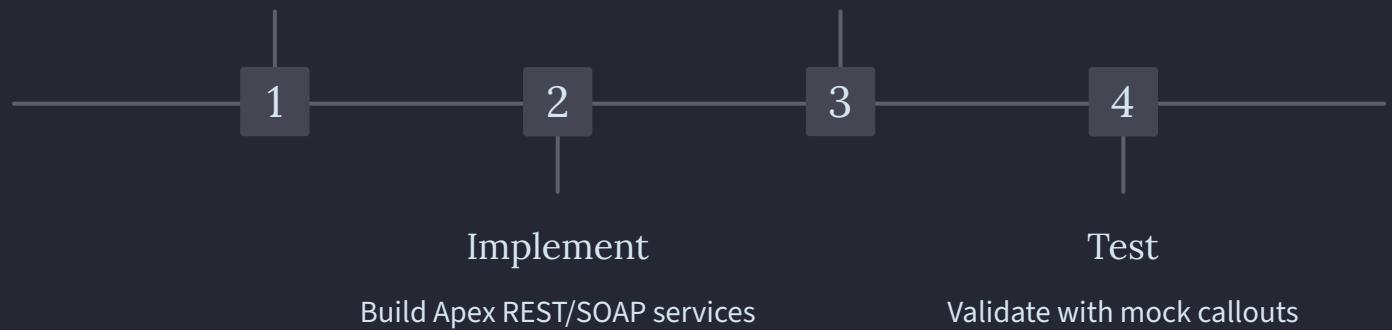
Serialization, deserialization, and JSON parsing for data exchange between systems

### Design API

Define endpoints and methods

### Secure

Configure authentication



### Implement

Build Apex REST/SOAP services

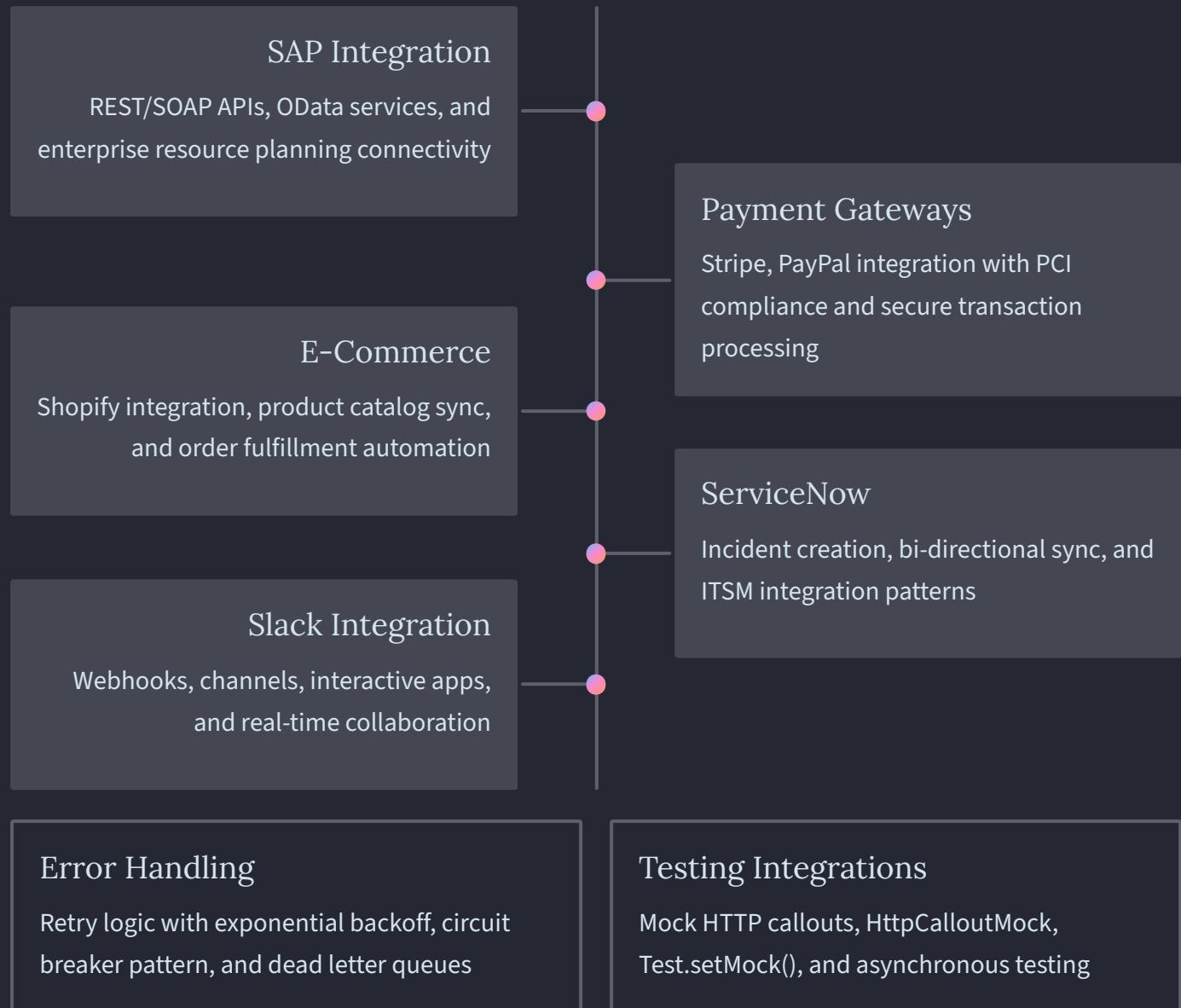
### Test

Validate with mock callouts

# External System Integration

## Module 4: Enterprise Integration Patterns

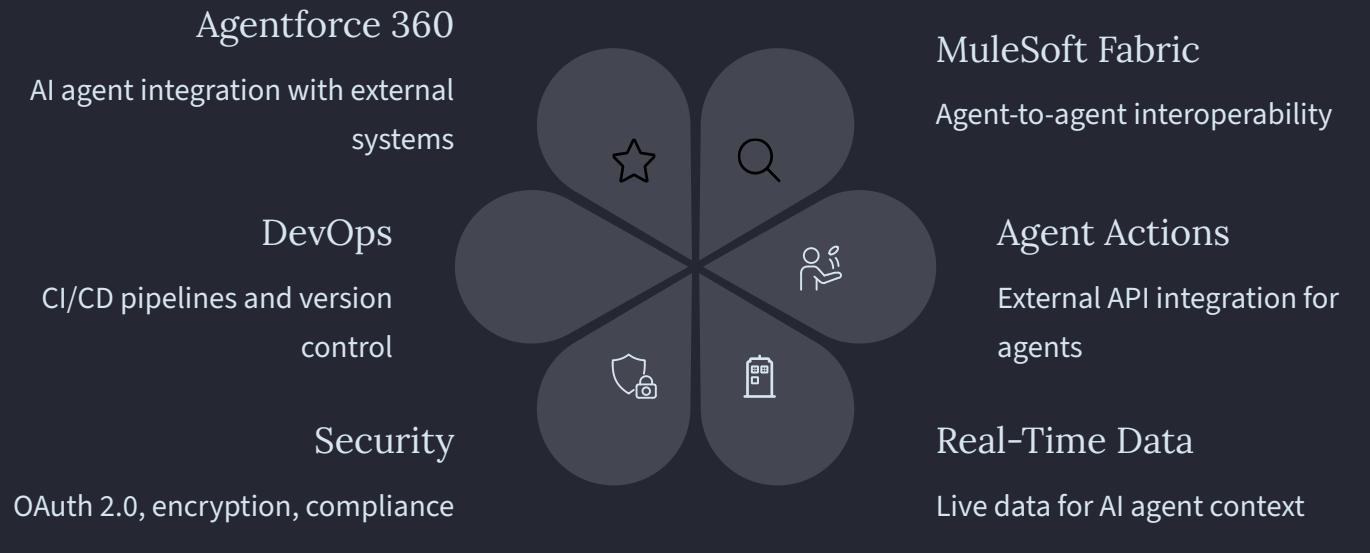
Integrate Salesforce with major enterprise systems. This module covers SAP integration, payment gateway integration with PCI compliance, e-commerce platforms, ServiceNow bi-directional sync, and Slack integration for comprehensive enterprise connectivity.



# Agentforce Integration & Security

## Module 5: AI Integration & DevOps

Complete your integration mastery with Agentforce 360 integration, MuleSoft Agent Fabric, and advanced security practices. Learn to integrate AI agents with external systems, implement OAuth 2.0 hardening, and establish CI/CD pipelines for integration deployments.



### Integration Security

OAuth 2.0 hardening, API key management, Named Credentials, External Credentials, HTTPS/TLS

### Performance & Governance

Bulkification, caching, pagination, API versioning, documentation, and troubleshooting

### Compliance

Field-level encryption, audit trails, GDPR, and data privacy regulations for secure integrations

### Debugging

Debug logs, Postman, Workbench, and common integration issues (timeout, authentication, JSON parsing)

# Agentforce Sales (Formerly Sales Cloud)

## Module 1: Sales Foundations & Automation



### Leads

Management, assignment rules, conversion, scoring, and web-to-lead automation



### Accounts

Hierarchy, teams, planning, and parent-child relationship management



### Contacts

Roles, hierarchy, multiple contacts, and relationship tracking



### Opportunities

Stages, sales processes, teams, products, and close date management

### Lead Generation

Capture and qualify leads

### Pipeline Management

Progress through sales stages

1

2

3

4

### Opportunity Creation

Convert leads to opportunities

### Quote & Close

Generate quotes and close deals

### Territory Management

Models, assignment, hierarchies, and forecasting for optimised sales coverage

### Sales Automation

Workflow automation, approval processes, sales path, guidance, and cadences

# AI Agents for Sales

## Module 2: Autonomous Sales Intelligence



Agentforce SDR and Sales Coach agents work 24/7, qualifying leads, engaging prospects, and providing real-time coaching—amplifying your sales team's effectiveness exponentially.

# Einstein AI & Predictive Analytics

## Module 3: AI-Powered Sales Intelligence

Leverage Einstein AI for predictive sales analytics. This module covers lead scoring, opportunity scoring, account insights, activity capture, conversation insights, and forecasting that transform data into actionable intelligence for sales success.



### Einstein Lead Scoring

Setup, interpretation, and prioritisation of high-value leads using AI predictions



### Opportunity Scoring

Deal prioritisation with AI-powered win probability and revenue predictions



### Account Insights

Real-time intelligence, news monitoring, and engagement signal tracking



### Activity Capture

Email and event capture, activity sync, and automatic matching

### Conversation Insights

Call recording, transcription, analysis, and sentiment tracking for coaching opportunities

### Einstein Forecasting

AI-powered predictions, forecast accuracy, and pipeline coverage analysis

### Sales Analytics

Pre-built dashboards for pipeline, forecast, activity, and rep performance

# Sales Performance Management

## Module 4: Measuring & Optimising Success

Master sales performance management with comprehensive KPI tracking, forecasting, quota management, and compensation strategies. Learn to measure pipeline velocity, win rates, and quota attainment whilst implementing gamification for team motivation.

5

Core KPIs

Pipeline velocity, win rate, deal size, cycle length, quota attainment

4

Forecast Categories

Pipeline, best case, commit, and closed for accurate predictions

360°

Performance View

Comprehensive sales performance management and analytics

Sales Forecasting

Collaborative, territory-based, product family forecasting with hierarchy and overrides

Quota Management

Setting, allocation, types, and tracking for individual and team quotas

Compensation

Commission, bonus, SPIF, and gamification for sales incentive programmes

Pipeline Metrics

Track pipeline velocity, coverage ratios, and conversion rates to identify bottlenecks and optimise sales processes

Rep Performance

Monitor individual and team performance against quotas, activities, and win rates for coaching opportunities

# Advanced Automation & Integration

## Module 5: Enterprise Sales Solutions

Complete your Agentforce Sales mastery with advanced automation, integration, and Data Cloud capabilities. Learn to connect sales with marketing automation, ERP systems, e-signature platforms, and external data sources for comprehensive sales enablement.



### Advanced Flows

Lead assignment and opportunity automation



### High Velocity Sales

Sales dialer and email integration



### LinkedIn Navigator

Social selling and prospecting



### Data Cloud

Customer 360 view and segmentation



### Marketing Integration

Pardot, HubSpot, Marketo connectivity



### ERP Integration

SAP, Oracle, NetSuite order management

### E-Signature Integration

DocuSign and Adobe Sign for seamless contract execution and approval workflows

### Communication Platforms

Slack and Microsoft Teams integration for real-time collaboration and notifications

### External Data

Dun & Bradstreet, ZoomInfo, Clearbit for enriched account and contact data

# Agentforce Service (Formerly Service Cloud)

## Module 1: Service Foundations & Case Management

Transform customer service with Agentforce Service. This comprehensive module covers case management, knowledge base creation, service console navigation, SLA management, and omni-channel routing that deliver exceptional customer experiences.



### Cases

Management, assignment rules, auto-response, escalation, web-to-case, email-to-case



### Knowledge

Articles, types, templates, publishing workflow, categories, and search



### Service Console

Navigation, keyboard shortcuts, macros, utility bar, and productivity tools



### SLA Management

Entitlement processes, milestone tracking, and violation alerts

01

#### Case Creation

Web-to-case, email-to-case, and manual case entry

02

#### Case Routing

Assignment rules, omni-channel, and skills-based routing

03

#### Case Resolution

Knowledge articles, macros, and solution documentation

04

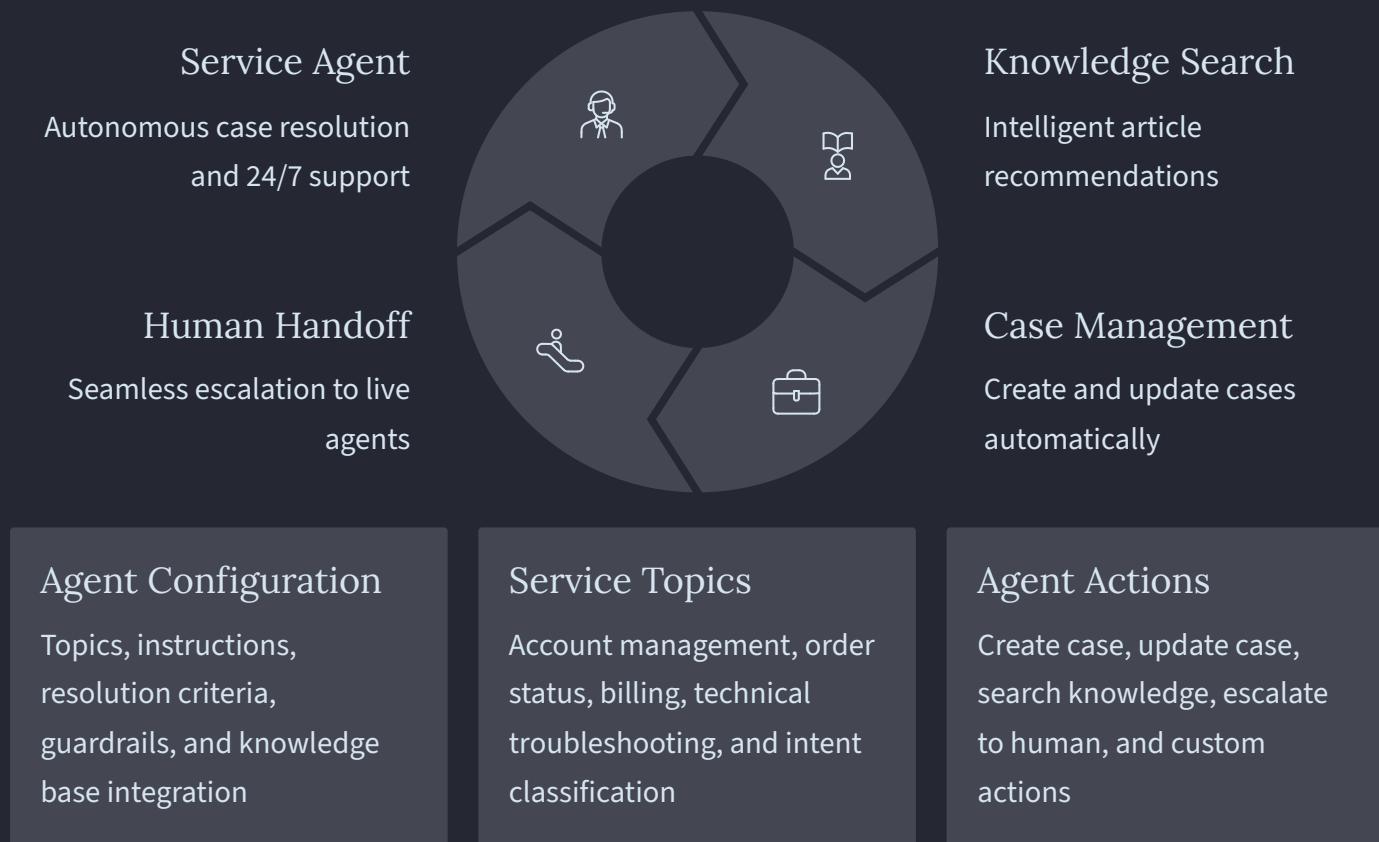
#### Case Closure

Resolution tracking, customer satisfaction, and feedback

# Agentforce Service Agent

## Module 2: Autonomous Customer Support

Deploy autonomous service agents that provide 24/7 customer support. This module covers Agentforce Service Agent configuration, topic creation, action definition, and integration with knowledge bases for intelligent, self-service customer experiences.



### Multi-Turn Conversations

Natural dialogue flow with context retention for complex customer inquiries and problem resolution

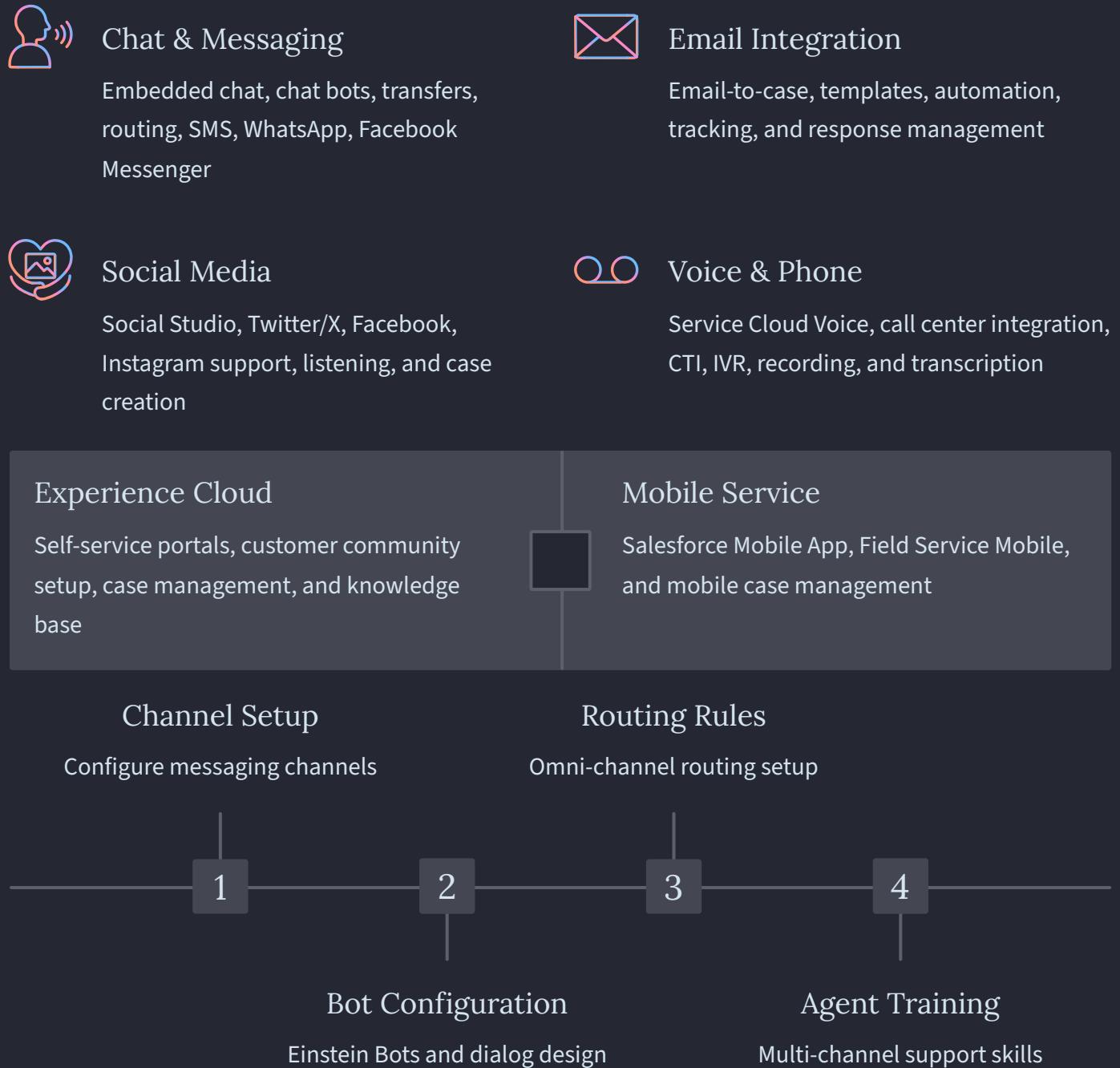
### Trust & Compliance

Trust Layer, data security, GDPR, CCPA, HIPAA compliance, and audit trails

# Omnichannel Engagement

## Module 3: Multi-Channel Customer Experience

Deliver seamless customer experiences across all channels. This module covers chat, messaging, email, social media, voice, and Experience Cloud for comprehensive omnichannel engagement that meets customers wherever they are.



# Field Service & Contact Center

## Module 4: Mobile Workforce & Einstein AI

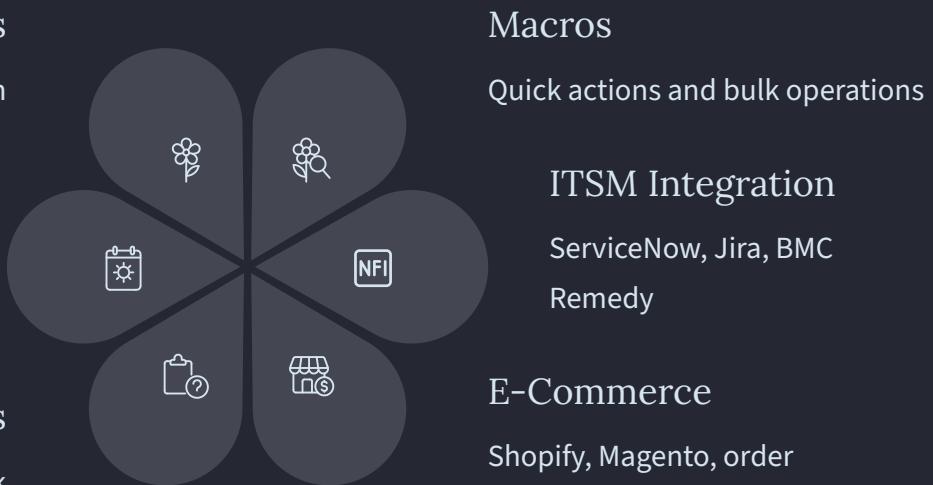
Extend service capabilities with Field Service Lightning and contact center integration. This module covers mobile workforce management, scheduling, dispatch, and Einstein AI features including case classification, article recommendations, and conversation insights.



# Service Automation & Integration

## Module 5: Enterprise Service Solutions

Complete your Agentforce Service mastery with advanced automation, integration, and Data Cloud capabilities. Learn to connect service with CRM, ITSM, e-commerce, and survey tools for comprehensive customer service excellence.



### Process Automation

Case status updates, notification triggers, approval processes, and service catalog automation

### CRM Integration

Marketing Cloud, Sales Cloud handoff, Commerce Cloud, and cross-cloud workflows

### Implementation Best Practices

Service Cloud implementation methodology, change management, and user adoption strategies

# Agentforce Marketing (Formerly Marketing Cloud)

## Module 1: Marketing Cloud Foundations

Master the Agentforce Marketing ecosystem. This comprehensive module covers Marketing Cloud Studios, Builders, contact and subscriber models, multi-channel orchestration, and the revolutionary Atlas Reasoning Engine that powers autonomous marketing agents.

### Studios & Builders

Email, Content, Journey, Automation, Mobile, Advertising, and Web Studio ecosystem

### Data Models

Contact vs Subscriber models, Data Extensions, Attribute Groups, and relationships

### Multi-Channel

Email, SMS, Push, Mobile, Web, and Advertising orchestration



### Agentforce Architecture

Atlas Reasoning Engine, Trust Layer, and autonomous marketing agents



### Data 360 Integration

Unified customer profiles and synchronized data sources



### Marketing Cloud Connect

CRM integration and bi-directional data synchronization



### Configuration

Business units, domain authentication, sender profiles, and permissions

# Email Studio & AI Content

## Module 2: Intelligent Email Marketing

Create compelling email campaigns with Email Studio and AI-powered content generation. This module covers templates, personalization, dynamic content, AMPscript, Einstein CoPilot, and deliverability best practices for maximum engagement.



### Email Studio

Templates, personalization, dynamic content, subscriber management, and segmentation



### Content Builder

Reusable blocks, templates, brand assets, version control, and content library



### AMPscript & GTL

Variables, lookups, conditionals, Data Extensions, and Guide Template Language



### Einstein CoPilot

AI content generation, smart recommendations, and predictive send time optimization

### Design

Create email templates

### Test

A/B and multivariate testing

1

2

3

4

### Personalize

Add dynamic content

### Optimize

Deliverability and engagement

### Deliverability

Sender authentication (SAP, DKIM, SPF), IP warming, and reputation management

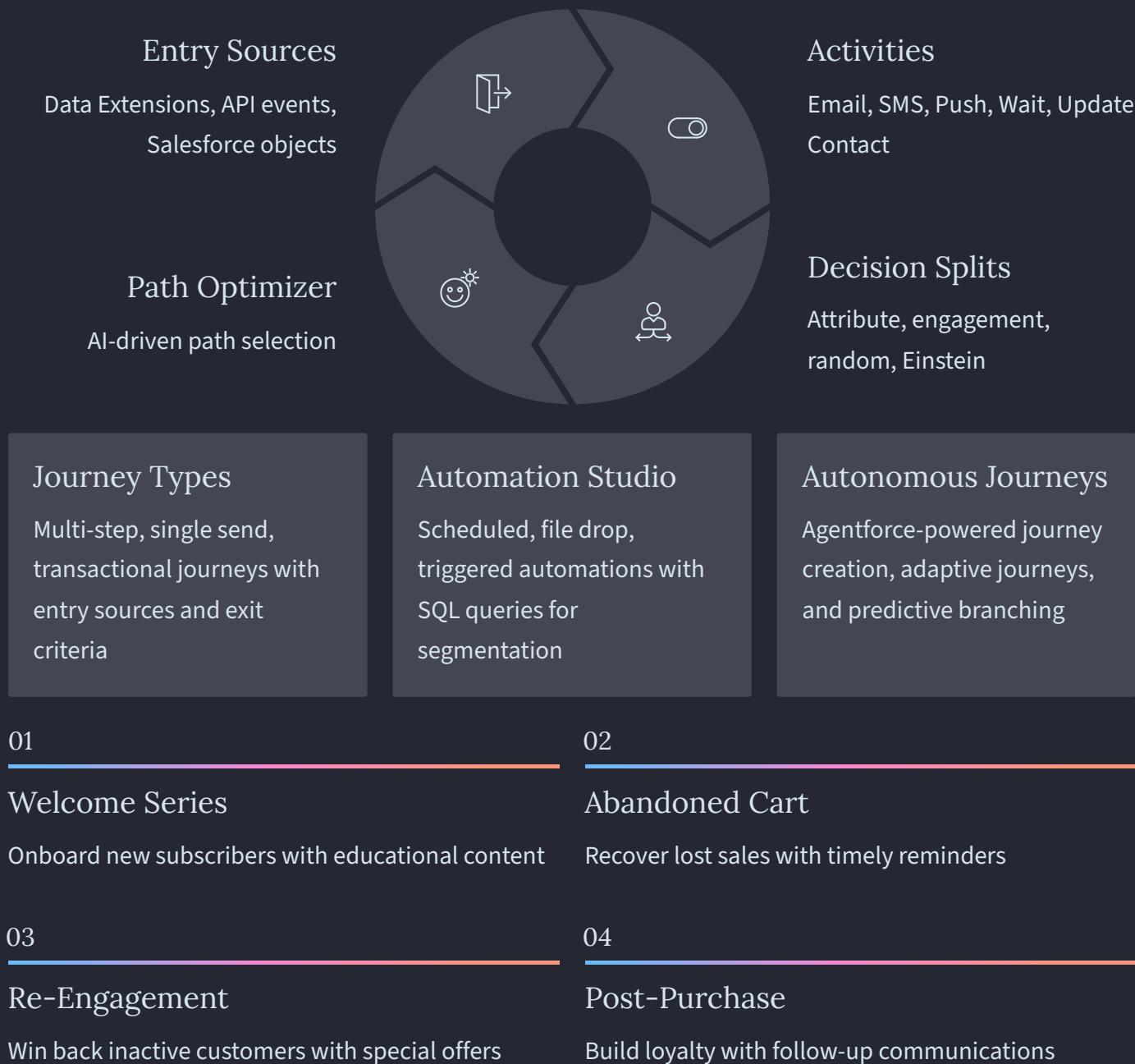
### Compliance

CAN-SPAM, GDPR, CASL regulations, consent management, and unsubscribe handling

# Journey Builder & Automation

## Module 3: Orchestrating Customer Journeys

Design sophisticated customer journeys with Journey Builder and Automation Studio. This module covers multi-step journeys, decision splits, path optimizer, SQL for segmentation, and autonomous journey creation with Agentforce.



# Audience Management & Mobile

## Module 4: Multi-Channel Engagement

Master audience segmentation and mobile marketing. This module covers Contact Builder, Data Extensions, predictive segmentation, MobileConnect for SMS/MMS, MobilePush, GroupConnect for WhatsApp, and Advertising Studio integration.



### Contact Builder

Data Designer, Attribute Groups, link relationships, and unified customer profiles



### Segmentation

Behavioral, demographic, RFM analysis, predictive segmentation, and look-alike modeling



### MobileConnect

SMS/MMS, short codes, keyword management, and TCPA compliance



### MobilePush

SDK implementation, push notifications, and location-based messaging

### GroupConnect

WhatsApp and Line integration for conversational marketing and customer engagement

### Advertising Studio

Facebook, Instagram, LinkedIn, Google integration for social advertising campaigns

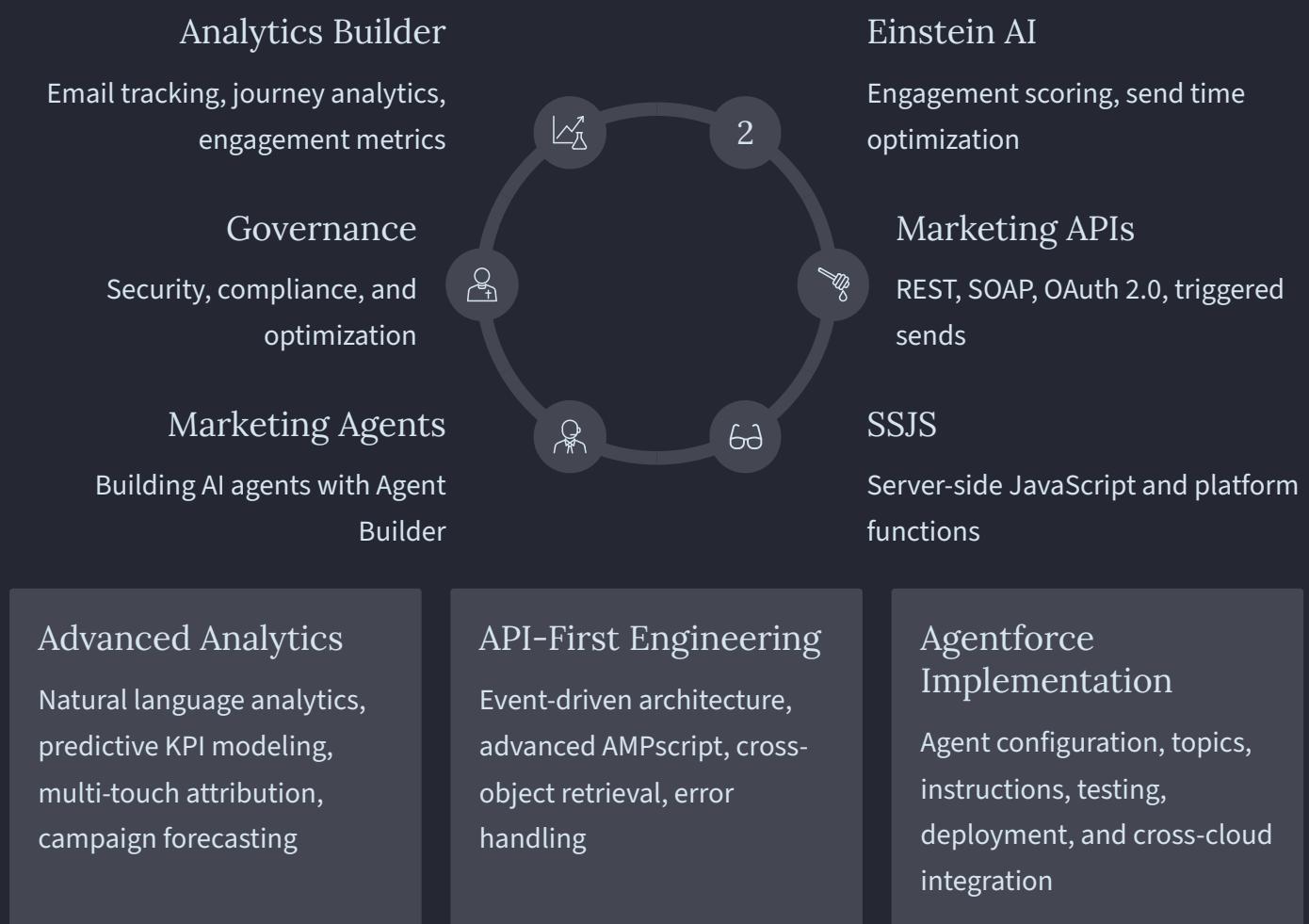
### Web Studio

CloudPages, Smart Capture forms, AMPscript in web, and LLM-powered experiences

- ❑ **Data Cloud Integration:** Unified profiles, identity resolution, and DMOs enable sophisticated segmentation and personalization across all channels.

# Analytics, APIs & Agentforce Implementation

## Module 5: Advanced Marketing Engineering



### Security & Compliance

User roles, business unit hierarchy, field-level security, audit trails, GDPR, CCPA, Marketing Cloud Shield

### Performance Optimization

Query tuning, deliverability optimization, large-scale campaigns, and Einstein 1 integration

Agentforce Marketing represents the future—where AI agents autonomously create campaigns, optimize content, and personalize experiences at scale, transforming marketers into strategic orchestrators of intelligent automation.