AGENTFORCE AI

Salesforce Admin Certification Study Guide

8% of Exam Content

OVERVIEW

This section covers 8% of the Salesforce Administrator certification exam and focuses on Agentforce, Salesforce's autonomous AI agent platform. You'll need to understand Agentforce capabilities, security and permissions, prompt management in Agent Builder, and testing/troubleshooting agent conversations.

Important Note: Agentforce is a newer feature in Salesforce, launched at Dreamforce 2024. The certification exam was updated in 2025 to include significant Agentforce content. This is cutting-edge technology that represents Salesforce's AI-first future.

1. WHAT IS AGENTFORCE?

Agentforce Fundamentals

Agentforce is Salesforce's suite of autonomous and assistive AI agents that can handle complex business tasks independently. These agents use the Atlas Reasoning Engine and large language models (LLMs) to understand context, make decisions, and take actions on behalf of users.

Key Characteristics of Agentforce

- Autonomous: Agents can handle tasks independently without constant human supervision
- Contextual: Uses conversation history and CRM data to make intelligent decisions
- Trusted: Built on Einstein Trust Layer with zero-data retention policy
- Multi-channel: Deploy agents in Slack, websites, mobile apps, or Salesforce interface
- Customizable: Configure with Agent Builder using low-code tools

Types of Agentforce Agents

Service Agent

- Handles customer support inquiries autonomously
- Creates cases, finds knowledge articles, provides answers
- Can escalate to human agents when needed
- Generally available (GA) as of 2025

Sales Agent

- Assists sales teams with prospecting and lead qualification
- Handles sales inquiries and product questions
- Scheduled for release in 2025

Employee Agent

- Internal-facing agents for employee productivity
- User-specific context: logged in as the person they're helping
- Follow same permissions and org security as the user
- Examples: HR self-service, policy questions, IT support

Agentforce (Default) Agent

- Built-in general agent available to all orgs with Agentforce
- Can be customized for employee use
- Also known as Agent for Setup when configured for admins

How Agentforce Works

The Atlas Reasoning Engine

Atlas is the 'brain' that powers Agentforce. It coordinates how agents understand requests, select topics, call actions, and generate responses.

- Analyzes user input to determine intent
- Selects appropriate topics based on conversation context
- Executes actions (Flows, Apex, Prompt Templates, APIs)
- Maintains conversation memory and context
- Hybrid reasoning: combines LLM flexibility with programmatic control

Agent Components

Topics

- Specific jobs or tasks the agent can handle
- Contain instructions that define agent behavior
- Examples: Create Case, Find Product Info, Schedule Meeting
- Can include filters and variables for deterministic behavior

Actions

- Executable tasks that agents perform
- Can be: Flow, Apex, Prompt Template, or API
- Standard actions: Pre-built (Query Records, Summarize Records)
- Custom actions: Built for specific business needs

Instructions

- Natural language guidelines defining agent behavior
- Tell agent WHEN to use actions and HOW to respond

- Should be clear, specific, and aligned with business rules

🔲 EXAM TIP

Understand the Agent Builder components: Topics contain Instructions and call Actions. The Atlas Reasoning Engine uses these components to generate intelligent, context-aware responses.

2. SECURITY AND PERMISSIONS

The Agent User Concept

CRITICAL CONCEPT: Agent access equals the underlying Salesforce user's permissions. Every agent operates as a specific Salesforce user called the Agent User. The agent can ONLY access data and perform actions that this user has permission to access.

How Agent User Works

- When creating an agent, you must select or create an Agent User
- The agent inherits ALL permissions from this user
- Agent User is a standard Salesforce user (not a special user type)
- Typically created with Einstein Agent User profile or similar
- Requires Einstein Agent license to function

Permission Requirements

For the Agent User

The Agent User needs specific permissions to perform its job:

- **Object Permissions (CRUD):** Create, Read, Update, Delete access on relevant objects
- **Field-Level Security (FLS):** Read/Edit access to specific fields the agent needs
- **Record Access:** Sharing rules, role hierarchy, or manual sharing
- **Flow Permissions:** If agent calls Flows, user needs Flow access
- **Apex Class Access:** If agent calls Apex actions, user needs Apex permissions

For Admins Managing Agents

- Agentforce Default Admin permission set OR
- Customize Application permission

Common Permission Issues

Issue 1: Missing CRUD Permissions

Symptom: Agent cannot create cases, update contacts, or access objects

Cause: Agent User lacks Create, Read, Update, or Delete permissions on the object

Fix: Add object permissions to the Agent User's permission set or profile

Issue 2: Field-Level Security Problems

Symptom: Agent cannot see or update specific fields (e.g., Email, Phone)

Cause: Agent User doesn't have field-level read or edit access

Fix: Grant field-level security through permission set or profile settings

Issue 3: Record Access Limitations

Symptom: Agent cannot access certain records even with object permissions

Cause: Organization-Wide Defaults (OWD) are Private/Read Only and Agent User isn't in sharing rules

Fix: Create sharing rules, adjust role hierarchy, or grant manual sharing to Agent User

Issue 4: Flow or Apex Permissions

Symptom: Agent actions fail when trying to execute Flows or Apex

Cause: Agent User doesn't have permission to run the Flow or Apex class

Fix: Add Flow access or Apex class access to the Agent User's permission set

Troubleshooting Security Issues

Step-by-Step Troubleshooting

1. Identify the Agent User assigned to the agent
2. Check Object permissions: Does user have CRUD access?
3. Check Field-Level Security: Can user see/edit needed fields?
4. Check Record access: Sharing rules, OWD settings, role hierarchy
5. Check Flow/Apex permissions: Does user have execution access?
6. Use Enhanced Event Logs to see exactly where agent failed

Best Practice: Permission Sets

Create a dedicated permission set for the Agent User with all needed permissions:

- Object CRUD permissions
- Field-level security
- Flow access
- Apex class access
- Agentforce-specific permissions

☐ EXAM TIP

MEMORIZE THIS: Agent access = Agent User permissions. If the agent can't do something, check what the Agent User is allowed to do. The most common issues are missing CRUD, FLS, record access, or Flow/Apex permissions.

3. UPDATING PROMPTS IN AGENT BUILDER

What Are Prompts and Instructions?

Prompts and Instructions are natural language guidelines that tell agents how to behave, when to use actions, and how to respond to users. They are the core of agent customization.

Topic Instructions

What Are Topic Instructions?

Instructions are written in natural language within each topic to guide the agent's behavior.

- Define WHEN the agent should use specific actions
- Specify HOW the agent should respond to users
- Set guardrails and constraints
- Handle edge cases and fallback scenarios

Writing Effective Instructions

Best Practices:

- **Be Clear and Specific:** Write as if explaining to a person doing the job
- **Use Natural Language:** Avoid jargon or abstract shorthand
- **Include Context:** Explain the business scenario
- **Set Constraints:** Define what the agent should NOT do
- **Provide Examples:** Show what good responses look like

Example Instructions

Poor Instruction:

"Create case when user asks."

Good Instruction:

"When the customer describes a problem with their order, create a case. Before creating the case, verify you have the customer's email address and order number. If missing, politely ask: 'Can you please provide your email address and order number so I can create a support case for you?' After creating the case, confirm with: 'I've created case #[case number] for your issue. Our team will respond within 24 hours.'"

Updating Instructions in Agent Builder

How to Update Instructions

7. Navigate to Setup > Agentforce Agents
8. Select your agent
9. Click Open in Builder

10. Deactivate the agent (required before editing)
11. Select the topic you want to edit
12. Update the instructions in the text boxes
13. Click Refresh in Conversation Preview to test
14. Reactivate the agent when satisfied

Prompt Builder Integration

What is Prompt Builder?

Prompt Builder is Salesforce's tool for creating reusable prompt templates that agents can use as actions.

- Create templated prompts for generative AI tasks
- Connect prompts to Salesforce data
- Use for summarization, classification, content creation
- Prompts become actions that agents can call

Prompt Template Types

- **Flex Template:** Most flexible, for complex scenarios
- **Field Generation:** Generate values for specific fields
- **Record Summary:** Summarize Salesforce records

Installing Prompt Templates as Actions

15. Create prompt template in Prompt Builder
16. Activate the prompt template
17. In Agent Builder, go to the relevant topic
18. Click Add Action from Asset Library
19. Select the prompt template
20. Add instructions for when to use the prompt template

Connecting Data Sources

Agents can access data from various sources to provide accurate responses:

- **Salesforce Objects:** Cases, Accounts, Contacts, custom objects
- **Knowledge Articles:** Salesforce Knowledge base
- **Data Cloud:** Unified customer data from multiple sources
- **External Data:** Via APIs and integrations

☐ EXAM TIP

Instructions should be clear, specific, and aligned with business rules. When updating prompts, always test in Conversation Preview before reactivating the agent. Prompt templates created in Prompt Builder become actions that agents can call.

4. TESTING AND CONVERSATION PREVIEW

Conversation Preview

Conversation Preview is the interactive testing panel in Agent Builder where you can chat with your agent to see how it performs before deployment.

How to Use Conversation Preview

21. Open your agent in Agent Builder
22. Locate Conversation Preview panel (usually on the right)
23. Type natural language queries as if you were a user
24. Review agent's responses
25. Check Plan Tracer in center panel to see reasoning

What to Test

- **Topic Selection:** Does agent pick the right topic?
- **Action Execution:** Does agent call the correct actions?
- **Data Access:** Can agent retrieve needed information?
- **Response Quality:** Are responses helpful and accurate?
- **Edge Cases:** How does agent handle unexpected inputs?
- **Guardrails:** Does agent stay within defined boundaries?

Plan Tracer / Canvas View

The Plan Tracer (also called Canvas in new Agent Builder) shows behind-the-scenes details of how the agent processes each message.

What Plan Tracer Shows

- Session Start: Conversation begins
- User Prompt: What the user typed
- Select Topic: Which topic was chosen
- Select Action: Which action was called
- Execute Action: Action running with parameters
- Agent Response: Final output to user

Using Plan Tracer for Debugging

If agent behaves incorrectly, Plan Tracer helps identify where things went wrong:

- Wrong topic selected? Refine topic classification descriptions
- Wrong action called? Update instructions
- Action failed? Check permissions or data availability
- Poor response? Improve prompts or add context

Testing Modes

Simulate Mode (New Agent Builder)

- Risk-free testing environment
- Checks agent configuration without running actions
- Doesn't modify data or check permissions

Live Test Mode (New Agent Builder)

- Runs actual actions and makes real changes
- Tests with real data and permissions
- Use in sandbox or test org to avoid affecting production data

Enhanced Event Logs

Enhanced Event Logs capture and store full conversation details for review and troubleshooting.

Enabling Enhanced Event Logs

- Enable during agent creation: Check box 'Keep a record of conversations with Enhanced Event Logs'
- Enable later: Go to Agent Details > Settings tab

What Event Logs Contain

- Complete conversation transcript
- Session details and timestamps
- Topics and actions triggered
- User inputs and agent responses
- Error messages and failures

Testing Center (Batch Testing)

Testing Center allows batch testing of multiple scenarios at once instead of testing one-by-one in Conversation Preview.

How Testing Center Works

26. Create CSV file with test scenarios (user utterances)
27. Define expected outcomes (topics, actions, responses)
28. Upload to Testing Center
29. Run tests (can test dozens or hundreds at once)
30. Review pass/fail results

Test Criteria Types

- **Topic Pass %:** Did agent select expected topic?
- **Action Pass %:** Did agent call expected actions?
- **Response Pass %:** Did response match expectations?

Common Testing Scenarios

Scenario 1: Agent Selects Wrong Topic

Problem: User asks to create a case but agent tries to schedule a meeting

Fix: Refine topic classification descriptions. Make them more distinct and specific.

Scenario 2: Agent Cannot Access Data

Problem: Agent tries to query cases but returns no results

Fix: Check Agent User permissions. Ensure CRUD access and record visibility.

Scenario 3: Action Fails to Execute

Problem: Agent selects correct action but it doesn't run

Fix: Check Flow/Apex permissions for Agent User. Verify action inputs are provided correctly.

☐ EXAM TIP

Use Conversation Preview for interactive testing. Use Plan Tracer/Canvas to see reasoning steps. Enable Enhanced Event Logs for production troubleshooting. Use Testing Center for batch testing multiple scenarios. Always test before deploying to users!

QUICK REFERENCE SUMMARY

Concept	Key Points
Agentforce	Autonomous AI agents. Powered by Atlas Reasoning Engine. Service, Sales, Employee agents.
Agent User	Agent access = Agent User permissions. Standard Salesforce user. Requires Einstein Agent license.
Topics	Specific jobs agent handles. Contain instructions. Can have filters/variables.
Actions	Executable tasks. Types: Flow, Apex, Prompt Template, API. Standard or custom.
Instructions	Natural language guidelines. Define when/how to use actions. Be clear and specific.
Permissions Issues	Missing CRUD, FLS, record access, Flow/Apex permissions. Fix via permission sets.
Conversation Preview	Interactive testing panel. Test topics, actions, responses. Use Plan Tracer for debugging.
Enhanced Event Logs	Stores conversation details. Enable for production troubleshooting. Shows full transcripts.
Prompt Builder	Creates reusable prompt templates. Templates become agent actions. Types: Flex, Field Gen, Record Summary.

CRITICAL EXAM TIPS

31. **Agent Access = Agent User Permissions:** This is the MOST important concept. Agents inherit all permissions from the Agent User. If agent can't do something, check Agent User permissions first.
32. **Common Permission Issues:** Missing CRUD, Field-Level Security, Record Access (sharing rules), Flow permissions, or Apex class access.
33. **Agent Components:** Topics contain Instructions and call Actions. Actions are Flow, Apex, Prompt Template, or API. Atlas Reasoning Engine coordinates everything.
34. **Writing Instructions:** Be clear, specific, use natural language, include context, set constraints, provide examples. Write as if explaining to a person.

35. **Testing Tools:** Conversation Preview for interactive testing. Plan Tracer/Canvas for debugging. Enhanced Event Logs for production. Testing Center for batch tests.
36. **Updating Agents:** Must deactivate agent before editing. Always test in Conversation Preview after changes. Reactivate when satisfied.
37. **Prompt Builder:** Create reusable prompt templates for generative AI. Templates become actions agents can call. Connects to Salesforce data.
38. **Employee Agents:** User-specific context - logged in as the person they're helping. Follow user's permissions. Ensures security boundaries.
39. **Einstein Trust Layer:** Zero-data retention policy. Requests/responses forgotten immediately. Toxicity detection prevents harmful language.
40. **Agent Types:** Service Agent (GA), Sales Agent (coming soon), Employee Agent, Agentforce Default Agent (customizable for employees).

PRACTICE SCENARIOS

Scenario 1:

Your Service Agent can view cases but cannot create new ones. What is the most likely cause?

Answer: The Agent User lacks Create permission on the Case object. Check the Agent User's permission set or profile and grant Create access to Cases. This is a CRUD permission issue.

Scenario 2:

You've updated instructions for a topic in Agent Builder, but the agent still behaves the old way. What did you forget?

Answer: Click the Refresh button in Conversation Preview to apply changes. Updates to instructions don't automatically refresh the preview panel - you must manually refresh.

Scenario 3:

Your agent is selecting the wrong topic when users ask product questions. How do you troubleshoot this?

Answer: Use Conversation Preview to test, then check the Plan Tracer to see which topic was selected and why. Refine the topic classification descriptions to make them more distinct. Ensure the product questions topic has clear, specific language that differentiates it from other topics.

Scenario 4:

An agent action that calls a Flow is failing. The Flow works fine when you run it manually. What should you check?

Answer: Check if the Agent User has permission to run the Flow. Go to the Agent User's permission set and verify Flow access is granted. Also check that the Flow is active and that all inputs are being provided correctly by the agent.

Good luck with your Salesforce Admin Certification Exam!

Agentforce represents the future of Salesforce - mastering it now positions you at the forefront of AI-powered CRM.