

QUESTION: 1

An HR team needs to create personalized onboarding materials for new employees across different departments. These materials should include department-specific training plans, company policies, and customized welcome messages. The team wants to ensure consistency across all documents while saving time in the creation process.

Should they use Prompt Builder, and why?

Option A : Yes, because Prompt Builder can generate consistent and customized onboarding materials based on predefined templates

Option B : No, because onboarding materials require a personal touch that AI cannot provide

Option C : Yes, but only for generating generic content like company policies, not for personalized sections

Option D : No, because Prompt Builder is more suitable for customer-facing content, not internal documents

Correct Answer: A

Explanation/Reference:

Correct Answer: A. Yes, because Prompt Builder can generate consistent and customized onboarding materials based on predefined templates. Prompt Builder is appropriate for generating customized and consistent onboarding materials tailored to different departments, ensuring that the HR team can efficiently create high-quality documents. Option B is incorrect. While AI-generated content can be customized, the HR team can still review and refine it to add a personal touch. Option C is incorrect. Prompt Builder is well-suited for creating both generic and personalized content, making it useful for the entire onboarding process. Option D is incorrect. Prompt Builder is versatile and can be effectively used for internal documents, not just customer-facing content.

QUESTION: 2

A sales team wants to ensure that their AI-generated emails are always based on the most recent customer interaction data stored in the CRM, such as recent purchases or support cases.

Which grounding technique should they use to achieve this?

Option A : Using static text templates

Option B : Referencing historical sales reports

Option C : Integrating real-time CRM data into the prompts

Option D : Leveraging external data sources like social media profiles

Correct Answer: C

Explanation/Reference:

Correct Answer: C. Integrating real-time CRM data into the prompts Integrating real-time CRM data into the prompts is the correct grounding technique because it ensures that the AI-generated emails are based on the most up-to-date customer interactions, leading to more relevant and personalized communication. Option A is incorrect. Static text templates do not adapt to the latest data, which can result in outdated or irrelevant content. Option B is incorrect. Historical sales reports provide past data, which might not reflect the current context needed for personalized emails. Option D is incorrect. External data sources like social media profiles might provide additional context but are less reliable for grounding emails in recent, relevant CRM interactions.

QUESTION: 3

In a scenario where customer service agents need AI-generated summaries of case details after resolving an issue, which Einstein for Service feature should be used?

- Option A : Einstein Reply Recommendations
- Option B : Einstein Case Wrap-Up
- Option C : Einstein Case Classification
- Option D : Einstein Next Best Action

Correct Answer: B

Explanation/Reference:

Correct Answer: B. Einstein Case Wrap-Up Einstein Case Wrap-Up helps agents by automatically generating summaries of case details after the resolution, making it easier to document the outcome and close the case. Option A is incorrect. Einstein Reply Recommendations generates suggested responses but does not summarize cases. Option C is incorrect. Einstein Case Classification automatically categorizes cases but doesn't generate summaries. Option D is incorrect. Einstein Next Best Action provides recommendations for subsequent actions but does not generate summaries.

QUESTION: 4

A tech startup is building a chatbot to assist users with complex troubleshooting tasks. The team is debating between using a standard Salesforce LLM, customizing their own model, or bringing in an external LLM that was trained on a vast amount of technical documentation.

Under which condition would it be most appropriate to configure a custom generative model?

- Option A : When the startup requires the chatbot to understand and generate responses based on very specific, in-house technical terminology that standard models might not cover
- Option B : When the startup needs the chatbot to handle basic customer inquiries that do not require technical depth
- Option C : When the startup wants to use a model trained exclusively on general, public domain technical documents
- Option D : When the startup has a very limited dataset and no specific customization needs

Correct Answer: A

Explanation/Reference:

Correct Answer: A. When the startup requires the chatbot to understand and generate responses based on very specific, in-house technical terminology that standard models might not cover. A custom generative model is best when there is a need to integrate highly specific and proprietary technical language into the chatbot's responses, ensuring that it can handle complex, company-specific troubleshooting tasks effectively. Option B is incorrect. Standard models are sufficient for handling basic customer inquiries, so customization would be unnecessary. Option C is incorrect. If the model is trained on general, public domain data, a BYOLLM might be considered, but it may not be as effective as a custom model trained on proprietary data. Option D is incorrect. With limited data and no need for customization, a standard model would typically be more appropriate.

QUESTION: 5

A customer service center wants to provide customers with immediate answers to common questions, such as business hours or return policies, even outside of normal working hours. The team needs a feature that can automate these interactions without requiring agent involvement.

Which Einstein for Service feature should they implement?

- Option A : Einstein Case Classification
- Option B : Einstein Bot
- Option C : Einstein Article Recommendations
- Option D : Einstein Next Best Action

Correct Answer: B

Explanation/Reference:

Correct Answer: B. Einstein Bot Einstein Bot is the correct feature for this scenario. It allows the service center to automate interactions with customers, providing instant answers to common questions and handling simple tasks without needing an agent, making it ideal for after-hours support. Option A is incorrect. Einstein Case Classification is for categorizing cases and does not handle direct customer interactions or automate responses. Option C is incorrect. Einstein Article Recommendations suggests relevant knowledge articles but does not automate interactions with customers. Option D is incorrect. Einstein Next

Best Action provides action recommendations but is not designed to automate customer interactions.

QUESTION: 6

A marketing team wants to leverage a pre-trained Large Language Model (LLM) provided by Salesforce to generate personalized email content.

What is the most appropriate first step in configuring this model?

- Option A : Re-training the model with new data
- Option B : Selecting the standard generative model in Salesforce
- Option C : Integrating an external API to modify the model's behavior
- Option D : Disabling all default configurations to start from scratch

Correct Answer: B

Explanation/Reference:

Correct Answer: B. Selecting the standard generative model in Salesforce The first step for the marketing team is to select the standard generative model provided by Salesforce, which is pre-trained and ready for configuration. Option A is incorrect. Re-training the model is not necessary when using Salesforce's pre-trained standard models. Option C is incorrect. Integrating an external API is not required for standard models, as they are already configured for common use cases. Option D is incorrect. Disabling default configurations would eliminate the advantages of using a pre-trained, standard model and is unnecessary.

QUESTION: 7

A sales manager wants to ensure that all client interactions, such as emails and meetings, are automatically logged into the CRM without the need for manual input. This will help maintain accurate records and improve team efficiency.

Which Einstein feature should the sales manager implement?

- Option A : Einstein Opportunity Scoring
- Option B : Einstein Activity Capture
- Option C : Einstein Next Best Action
- Option D : Einstein Email Insights

Correct Answer: B

Explanation/Reference:

Correct Answer: B. Einstein Activity Capture Einstein Activity Capture is the correct feature because it automatically logs client interactions such as emails and meetings into the CRM, reducing the need for manual entry and ensuring accurate and up-to-date records. Option A is incorrect. Einstein Opportunity Scoring helps prioritize opportunities based on their likelihood to close, but does not log activities. Option C is incorrect. Einstein Next Best Action recommends actions based on data insights but does not capture or log activities automatically. Option D is incorrect. Einstein Email Insights analyzes and prioritizes emails but does not automatically log them into the CRM.

QUESTION: 8

When configuring a custom generative model in Salesforce Model Builder, which step is crucial to ensure the model's effectiveness in generating relevant outputs?

- Option A : Selecting the right pre-training data
- Option B : Choosing a model with the highest possible number of layers
- Option C : Integrating the model with Salesforce's CRM data
- Option D : Setting the model to prioritize performance over accuracy

Correct Answer: A

Explanation/Reference:

Correct Answer: A. Selecting the right pre-training data Selecting appropriate pre-training data is crucial for the effectiveness of a custom generative model. The relevance and quality of the data used during pre-training significantly impact the model's ability to generate meaningful and accurate outputs. Option B is incorrect. While the number of layers can affect a model's complexity, it is not as important as the relevance of the pre-training data. Option C is incorrect. Integrating with CRM data is beneficial but follows the model's initial configuration and training. Option D is incorrect. Prioritizing performance over accuracy might not always be desirable, especially if the model needs to generate highly accurate outputs.

QUESTION: 9

After implementing Einstein Copilot, your company notices that some departments are not fully utilizing the tool. To improve adoption, you want to identify the specific barriers to its usage.

What is the best method to gain insights into these challenges?

- Option A : Implement a survey to collect feedback from users on their experience with Copilot
- Option B : Schedule daily meetings to discuss Copilot usage

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Option C : Mandate the use of Copilot in all processes without exceptions
Option D : Review only the successful cases where Copilot was used

Correct Answer: A

Explanation/Reference:

Correct Answer: A. Implement a survey to collect feedback from users on their experience with Copilot Collecting feedback through surveys allows you to directly understand the challenges and barriers that users face when using Copilot. This method helps you identify specific issues and areas for improvement to increase adoption. Option B is incorrect: Daily meetings might lead to meeting fatigue and may not effectively gather the necessary insights. Option C is incorrect: Mandating usage without understanding barriers may increase frustration and reduce overall adoption. Option D is incorrect: Reviewing only successful cases ignores the challenges and reasons for underutilization, missing the opportunity for improvement.

QUESTION: 10

A sales team is ready to start using a new prompt template that has been created and assigned to them.

What must they do to execute the prompt template in their daily workflow?

- Option A : Manually enter the prompt template each time
- Option B : Select and run the template from the available options in Salesforce
- Option C : Wait for the administrator to trigger the template for them
- Option D : Create a duplicate of the template each time they need to use it

Correct Answer: B

Explanation/Reference:

Correct Answer: B. Select and run the template from the available options in Salesforce To execute the prompt template, the sales team should select and run the template from the available options in Salesforce. This allows them to efficiently use the pre-built template in their daily tasks. Option A is incorrect. Manually entering the prompt each time would be inefficient and error-prone. Option C is incorrect. The team should be able to run the template themselves without needing the administrator to trigger it each time. Option D is incorrect. Creating a duplicate of the template each time is unnecessary and does not align with the purpose of using a template.

QUESTION: 11

How does the Large Language Model (LLM) in Einstein Copilot determine the appropriate action to take when

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a user asks for help with generating a sales report?

Option A : By analyzing the user's tone and mood

Option B : By recognizing specific keywords and phrases related to sales reports

Option C : By executing the most frequently used command by other users

Option D : By sending the query to a human supervisor for manual execution

Correct Answer: B

Explanation/Reference:

Correct Answer: B. By recognizing specific keywords and phrases related to sales reports The LLM identifies relevant actions by recognizing specific keywords and phrases in the user's query, which are associated with predefined actions, such as generating a sales report. Option A is incorrect. The LLM focuses on understanding the content of the query rather than analyzing tone or mood. Option C is incorrect. The LLM does not rely on the most frequently used commands but rather on the specific context of the query. Option D is incorrect. The LLM is designed to execute actions automatically, without needing manual intervention from a human supervisor.

QUESTION: 12

An organization wants to delegate the execution of predefined prompt templates to specific users who will generate content using these templates without altering them.

Which user role should be assigned this task?

Option A : Content Creator

Option B : Salesforce Developer

Option C : Prompt Executor

Option D : System Administrator

Correct Answer: C

Explanation/Reference:

Correct Answer: C. Prompt Executor The Prompt Executor is the correct role because it is specifically designed to allow users to execute predefined prompt templates without the ability to modify them. This ensures that content generation follows the established guidelines and templates. Option A is incorrect. Content Creators typically focus on generating new content rather than executing predefined prompts. Option B is incorrect. Salesforce Developers may have the technical skills to modify templates but are not typically tasked with executing them. Option D is incorrect. The System Administrator could execute prompts, but this role is generally focused on broader system management rather than content generation.

QUESTION: 13

A financial services company needs to assess the credit risk of loan applicants based on their financial history and other relevant factors. When should they use Model Builder?

- Option A : When manually reviewing each applicant's credit history
- Option B : When calculating loan interest rates using a standard formula
- Option C : When developing a model to predict the likelihood of loan default based on applicant data
- Option D : When sending automated approval emails to low-risk applicants

Correct Answer: C

Explanation/Reference:

Correct Answer: C. When developing a model to predict the likelihood of loan default based on applicant data Model Builder is suitable for creating predictive models that assess the likelihood of specific outcomes, such as loan defaults. It can analyze various factors and provide insights to help the company make informed decisions. Option A is incorrect. Manually reviewing credit history is a time-consuming process that doesn't utilize the predictive power of Model Builder. Option B is incorrect. Calculating interest rates with a formula is straightforward and does not involve predictive modeling. Option D is incorrect. Sending automated emails is an operational task that does not require the use of Model Builder.

QUESTION: 14

Your team has successfully created and activated a prompt template in Salesforce.

What is the final step to ensure that the template is utilized in the intended business process?

- Option A : Run a training session for all users
- Option B : Execute the template within the relevant Salesforce processes
- Option C : Send a notification to management
- Option D : Archive the template for future reference

Correct Answer: B

Explanation/Reference:

Correct Answer: B. Execute the template within the relevant Salesforce processes The final step is to execute the template within the relevant Salesforce processes. This ensures that the template is used as intended to generate automated responses, reports, or other outputs. Option A is incorrect: Training users is important, but it is not the final step in the process of utilizing

the template. Option C is incorrect: Notifying management might be a good communication practice but does not directly impact the template's execution. Option D is incorrect: Archiving the template is irrelevant if the goal is to actively use it in business processes.

QUESTION: 15

A company wants to generate personalized customer emails using a pre-trained model that Salesforce provides out of the box.

What is the first step they should take to configure this model?

- Option A : Import the company's entire customer database into the model
- Option B : Select the standard generative model available in Salesforce
- Option C : Develop custom machine learning algorithms from scratch
- Option D : Connect the model to an external AI service for configuration

Correct Answer: B

Explanation/Reference:

Correct Answer: B. Select the standard generative model available in Salesforce The first step is to select the standard generative model provided by Salesforce, which is already pre-trained and ready to be configured for specific use cases like generating personalized emails. Option A is incorrect. Importing the entire customer database is not necessary for initial configuration of a pre-trained model. Option C is incorrect. Developing custom machine learning algorithms is unnecessary when using Salesforce's pre-trained models. Option D is incorrect. There's no need to connect to an external AI service; Salesforce's standard generative models are already designed for easy integration.

QUESTION: 16

A sales director needs to project the upcoming quarter's sales performance based on the current pipeline, historical trends, and real-time data. The director wants to use AI to predict future revenue and identify potential risks in achieving sales targets.

Which Einstein feature should the director use?

- Option A : Einstein Lead Scoring
- Option B : Einstein GPT for Sales Predictions
- Option C : Einstein Opportunity Insights
- Option D : Einstein Forecasting

Correct Answer: D

Explanation/Reference:

Correct Answer: D. Einstein Forecasting Einstein Forecasting is the correct feature because it uses AI to predict future sales performance by analyzing historical trends, pipeline data, and real-time information, helping the sales director to make informed decisions and manage risks effectively. Option A is incorrect. Einstein Lead Scoring focuses on evaluating the likelihood of leads converting, not forecasting overall sales performance. Option B is incorrect. Einstein GPT for Sales Predictions is not an existing feature; instead, Einstein Forecasting is the appropriate tool for this task. Option C is incorrect. Einstein Opportunity Insights provides insights into specific opportunities but does not forecast future sales performance.

QUESTION: 17

Which user role is best suited to manage and maintain prompt templates within Salesforce, ensuring they align with business needs?

- Option A : Sales Representative
- Option B : Marketing Manager
- Option C : System Administrator
- Option D : Customer Service Agent

Correct Answer: C

Explanation/Reference:

Correct Answer: C. System Administrator The System Administrator role typically has the necessary access and knowledge to manage and maintain prompt templates. They are responsible for configuring and overseeing system-wide settings, ensuring that the templates align with overall business objectives. Option A is incorrect. Sales Representatives focus on customer interaction and do not generally manage system configurations or templates. Option B is incorrect. While Marketing Managers may have input on content, they typically do not have the technical access or skills to manage prompt templates. Option D is incorrect. Customer Service Agents interact with customers and use templates but do not manage or maintain them.

QUESTION: 18

A company has rolled out Einstein Copilot and needs to ensure that its adoption leads to measurable business outcomes. The management team wants to link Copilot usage to key business metrics such as sales growth and customer satisfaction.

What is the best method to achieve this?

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- Option A : Regularly compare the performance of departments using Copilot with those that aren't
- Option B : Focus only on qualitative feedback from users about their Copilot experience
- Option C : Integrate Copilot usage data with business performance dashboards to correlate usage with key metrics
- Option D : Evaluate the impact of Copilot after a year of usage without intermediate checks

Correct Answer: C

Explanation/Reference:

Correct Answer: C. Integrate Copilot usage data with business performance dashboards to correlate usage with key metrics

Integrating Copilot usage data with business performance dashboards allows management to correlate Copilot usage with key business metrics, providing clear insights into how Copilot adoption is affecting overall business outcomes. Option A is incorrect. While comparing departments can provide some insights, it's more effective to integrate data into comprehensive dashboards for real-time analysis. Option B is incorrect. Focusing solely on qualitative feedback overlooks the need for quantitative measurement of business outcomes. Option D is incorrect. Delaying evaluation until after a year misses opportunities for timely adjustments and improvements in Copilot usage.

QUESTION: 19

A retail company wants to use a large language model (LLM) to generate personalized product descriptions based on customer preferences and past purchase behavior. They are evaluating whether to configure a standard generative model provided by Salesforce, create a custom model, or implement their own Bring Your Own Large Language Model (BYOLLM).

Which option should they choose if they need highly tailored outputs and want full control over the model's behavior?

- Option A : Use a standard generative model provided by Salesforce
- Option B : Configure a custom generative model within Salesforce
- Option C : Implement a Bring Your Own Large Language Model (BYOLLM)
- Option D : Use a third-party service to generate product descriptions

Correct Answer: C

Explanation/Reference:

Correct Answer: C. Implement a Bring Your Own Large Language Model (BYOLLM) The company should implement a BYOLLM if they require highly tailored outputs and full control over the model's behavior, including the ability to fine-tune and customize the model according to specific business needs. Option A is incorrect. While standard models are easier to deploy, they may not offer the level of customization and control required for highly specialized tasks. Option B is incorrect. Custom models within Salesforce offer more flexibility than standard models but still may not provide the full control that a BYOLLM offers.

Option D is incorrect. While third-party services can be used, they may not integrate as seamlessly with Salesforce or provide the necessary customization.

QUESTION: 20

What should be the primary focus when managing the adoption of Einstein Copilot across different departments?

Option A : Ensuring that all departments have equal usage of Einstein Copilot

Option B : Providing targeted training and support based on department-specific use cases

Option C : Monitoring the overall system performance to prevent any slowdowns

Option D : Forcing all employees to use Einstein Copilot regardless of their role

Correct Answer: B

Explanation/Reference:

Correct Answer: B. Providing targeted training and support based on department-specific use cases Different departments have varying needs and use cases, so targeted training and support help ensure that Einstein Copilot is adopted effectively and provides value in the context of specific departmental workflows. Option A is incorrect. Equal usage across departments is not as important as ensuring that each department uses the copilot effectively according to its needs. Option C is incorrect. While important, system performance monitoring does not directly address adoption and user engagement. Option D is incorrect. Forcing usage without considering the relevance to the role can lead to resistance and poor adoption outcomes.

QUESTION: 21

A company is using Salesforce Einstein to analyze customer data and generate predictive insights. They need to ensure that sensitive employee salary information is not included in any Einstein analytics due to strict internal data governance policies.

How can the company implement this using the Einstein Trust Layer?

Option A : Use Field-Level Security to hide the salary information from all users

Option B : Apply Einstein Data Exclusion to exclude salary information from being processed by Einstein

Option C : Encrypt the salary fields using Salesforce Shield Encryption

Option D : Remove the salary fields from the Salesforce schema

Correct Answer: B

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Explanation/Reference:

Correct Answer: B. Apply Einstein Data Exclusion to exclude salary information from being processed by Einstein Einstein Data Exclusion allows administrators to specify that certain fields, such as employee salary information, should not be used by Einstein for analytics or predictions, ensuring compliance with data governance policies. Option A is incorrect. Field-Level Security hides data from users but does not prevent Einstein from processing it. Option C is incorrect. Encryption secures the data but does not exclude it from being processed by Einstein. Option D is incorrect. Removing salary fields entirely is not necessary and would impact other business processes that might need this information.

QUESTION: 22

When would it be most appropriate to create a custom copilot action in Salesforce Einstein?

- Option A : When you need to automate a repetitive task that is common across all industries
- Option B : When a specific business process requires unique data inputs and custom logic
- Option C : When you want to use Salesforce's default functionalities without modification
- Option D : When you need to generate a standard sales report

Correct Answer: B

Explanation/Reference:

Correct Answer: B. When a specific business process requires unique data inputs and custom logic Custom copilot actions are ideal for scenarios where the standard actions do not meet specific business needs, requiring unique inputs and logic to automate the process effectively. Option A is incorrect. Standard copilot actions are more suitable for automating common tasks across industries. Option C is incorrect. Using default functionalities without modification typically does not require custom copilot actions. Option D is incorrect. Generating a standard sales report would typically be handled by a standard copilot action.

QUESTION: 23

A marketing team in a large enterprise is tasked with creating and managing AI-driven campaigns using Salesforce's Prompt Builder. The team consists of content creators, data analysts, and a marketing manager. Which user role should be assigned to the marketing manager to ensure they can both manage and execute prompt templates effectively?

- Option A : Content Creator
- Option B : Data Analyst

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Option C : Prompt Template Administrator
Option D : Campaign Viewer

Correct Answer: C

Explanation/Reference:

Correct Answer: C. Prompt Template Administrator The Prompt Template Administrator role is designed for users who need the ability to manage and execute prompt templates. This role allows the marketing manager to oversee the creation, modification, and deployment of AI-driven prompts within campaigns, ensuring that they align with business objectives. Option A is incorrect. The Content Creator role is typically focused on developing content rather than managing or executing prompt templates. Option B is incorrect. The Data Analyst role is primarily responsible for analyzing data, not managing prompt templates or executing them within campaigns. Option D is incorrect. The Campaign Viewer role is limited to viewing campaign results and does not have the permissions needed to manage or execute prompt templates.

QUESTION: 24

Which of the following is the primary consideration when configuring a Bring Your Own Large Language Model (BYOLLM) in Salesforce?

- Option A : Ensuring the model is pre-trained on Salesforce-specific data
- Option B : Verifying the model complies with Salesforce's API standards
- Option C : Making sure the model is deployed on a Salesforce-compatible infrastructure
- Option D : Ensuring the model has a high number of parameters for better accuracy

Correct Answer: C

Explanation/Reference:

Correct Answer: C. Making sure the model is deployed on a Salesforce-compatible infrastructure When configuring a BYOLLM in Salesforce, it's crucial to ensure that the model is deployed on infrastructure that is compatible with Salesforce's environment. This compatibility allows seamless integration and performance within Salesforce's ecosystem. Option A is incorrect. While pre-training on Salesforce-specific data can enhance the model's relevance, it is not the primary concern when configuring the model. Option B is incorrect. Compliance with Salesforce's API standards is important but secondary to ensuring that the infrastructure is compatible. Option D is incorrect. The number of parameters may affect the model's accuracy, but it is less critical than ensuring the model operates within a compatible infrastructure.

QUESTION: 25

A team is tasked with creating a prompt template to be used across multiple departments, each with different objectives.

What key consideration should guide the creation of this template to ensure it meets the needs of all departments?

- Option A : Incorporating department-specific terminology
- Option B : Keeping the prompt template as general as possible
- Option C : Limiting the template to predefined outputs
- Option D : Ensuring that the template is easy to modify by all users

Correct Answer: A

Explanation/Reference:

Correct Answer: A. Incorporating department-specific terminology Incorporating department-specific terminology is the correct consideration because it ensures that the prompt template is relevant and useful for each department's unique objectives, enhancing its effectiveness across the organization. Option B is incorrect. Keeping the prompt template general may result in it being too vague or ineffective for specific departmental needs. Option C is incorrect. Limiting the template to predefined outputs might restrict its flexibility and usefulness across different departments. Option D is incorrect. While making the template easy to modify is important, it should not compromise the template's effectiveness by overlooking department-specific needs.

QUESTION: 26

A Salesforce implementation team is setting up a series of prompt templates that will be used across multiple departments, including marketing and customer service. They need to ensure that only qualified users can modify these templates while allowing broader access for execution.

Which user role should be assigned the responsibility of modifying and managing these prompt templates?

- Option A : Marketing Specialist
- Option B : Salesforce Consultant
- Option C : Content Editor
- Option D : IT Manager

Correct Answer: B

Explanation/Reference:

Correct Answer: B. Salesforce Consultant A Salesforce Consultant is the most suitable role for modifying and managing prompt templates as they have the expertise and permissions to configure and adapt Salesforce functionalities according to business requirements, including prompt templates. Option A is incorrect: Marketing Specialists may use the templates but typically do not manage or modify them at the system level. Option C is incorrect: Content Editors may assist in developing content but do not have the technical permissions to manage Salesforce configurations. Option D is incorrect: While IT Managers have technical oversight, they may not have the specific Salesforce expertise needed to manage prompt templates.

QUESTION: 27

An organization wants to monitor the adoption of Einstein Copilot among its customer service agents and identify areas for improvement.

What is the most appropriate approach for tracking and evaluating Copilot usage?

Option A : Analyze the frequency of Copilot actions across all agents using Salesforce dashboards

Option B : Conduct weekly surveys asking agents if they are using Copilot

Option C : Set monthly targets for Copilot usage and penalize agents who do not meet them

Option D : Assign a team member to manually track Copilot usage by observing agent workflows

Correct Answer: A

Explanation/Reference:

Correct Answer: A. Analyze the frequency of Copilot actions across all agents using Salesforce dashboards. Analyzing the frequency of Copilot actions using Salesforce dashboards is the best approach because it provides data-driven insights into how often and effectively agents are using Copilot. This allows for objective evaluation and identification of areas where further training or support may be needed. Option B is incorrect. Surveys can provide some insights but are subjective and may not accurately reflect actual usage. Option C is incorrect. Penalizing agents may create a negative work environment and does not address the reasons for low adoption. Option D is incorrect. Manually tracking usage is inefficient and may lead to incomplete or inaccurate data collection.

QUESTION: 28

When a user asks Einstein Copilot to schedule a follow-up meeting with a client, how does the large language model (LLM) execute this action?

Option A : The LLM directly modifies the user's calendar in Salesforce without further verification

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- Option B : The LLM interprets the user's request, identifies the appropriate action, and uses Salesforce's scheduling API to create a calendar event
- Option C : The LLM sends a generic email to the client requesting a meeting time
- Option D : The LLM requires manual input from the user to execute the scheduling

Correct Answer: B

Explanation/Reference:

Correct Answer: B. The LLM interprets the user's request, identifies the appropriate action, and uses Salesforce's scheduling API to create a calendar event. The LLM processes the natural language input, understands the request to schedule a meeting, and then executes this action by interacting with Salesforce's scheduling API to create the event. Option A is incorrect. The LLM doesn't modify calendars directly; it uses APIs to perform actions within the system. Option C is incorrect. The LLM schedules the meeting through Salesforce, not by sending generic emails. Option D is incorrect. The LLM is designed to execute actions autonomously once the request is understood, without requiring further manual input for execution.

QUESTION: 29

A customer support team is integrating Salesforce Einstein Copilot into their operations. They plan to use standard copilot actions to automate ticket creation and follow-ups but also need to create custom actions for handling escalations based on specific criteria, such as issue severity and customer status.

What is the best approach for implementing these actions?

- Option A : Apply standard copilot actions for both routine and complex tasks to simplify the process
- Option B : Focus on developing custom copilot actions for all tasks to ensure full customization
- Option C : Leverage standard copilot actions for routine tasks and create custom actions for escalations that require specific handling
- Option D : Use a manual process for all tasks to ensure accuracy and control over the support process

Correct Answer: C

Explanation/Reference:

Correct Answer: C. Leverage standard copilot actions for routine tasks and create custom actions for escalations that require specific handling. Using standard copilot actions for routine tasks like ticket creation and follow-ups ensures efficiency, while custom actions are necessary for handling more complex situations like escalations that require specific criteria to be met. Option A is incorrect. Applying standard actions to complex tasks, such as escalations, may not provide the flexibility needed for effective issue resolution. Option B is incorrect. Developing custom actions for all tasks can be overcomplicated and unnecessary, particularly for routine tasks that standard actions can handle. Option D is incorrect. A manual process is less efficient and does not take full advantage of Einstein Copilot's capabilities to automate and streamline workflows.