

Study Guide

AI-201: Salesforce Certified
Agentforce Specialist



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Salesforce Certified Agentforce Specialist - Yatharth Chauhan

Study Guide to Prepare for the Exam

Introduction: What is Agentforce?

Think of **Agentforce** as smart AI employees for your company. These are intelligent computer programs that can understand what customers or employees ask, think about the best way to help, and then take action—all without a human having to tell them every step.

Imagine a robot helper who can:

- Understand what someone needs
- Look up information about that person
- Make decisions about what to do
- Actually do the work (like write an email, find an answer, or create a record)
- Report back to the human when needed

That's what Agentforce does inside Salesforce!

EXAM BASICS: Know Before You Enter

What You Need to Know	Details
Total Questions	60 multiple-choice questions + up to 5 bonus questions that don't count toward your score
Time Given	105 minutes (1 hour 45 minutes)
Passing Score	73% (which means about 44 questions correct out of 60)
Cost	FREE for your first try! (If you need to try again, it costs \$100)
Prerequisites	None - anyone can take this exam
No Books Allowed	You cannot bring any paper or digital notes to the exam

What You Need to Know	Details
What to Expect	Multiple choice only. Read carefully. One or more answers might be correct

THE 5 EXAM TOPICS: What You Need to Study

Your exam covers 5 main areas. Here's what matters for each:

1. AI Agents - 35% of the Exam (About 21 questions)

This is the **biggest section**. Focus hard on this area!

What You Need to Know:

A) What are AI Agents?

An AI agent is a computer program that:

- Listens when someone talks or types to it
- Understands what they're asking for
- Finds the right action to take
- Does the action in Salesforce
- Tells the person what happened

B) How Do Agents Work? (The Three Building Blocks)

Every agent in Salesforce has three important pieces:

1. **Topics** - These are like "job categories" for your agent
 - Each topic is a different type of work the agent can do
 - Example: "Help with Returns" is one topic, "Find Product Info" is another
 - Topics keep everything organized
 - You can use Salesforce's built-in topics OR create your own custom topics
2. **Instructions** - These are like rules that tell the agent HOW to behave
 - Example: "Always be polite" or "Never promise discounts over 20%"

- These guide the agent's decisions
- Example: "If the customer is angry, get a human to help"

3. **Actions** - These are the actual JOBS the agent can do

- Standard actions: things the agent can do by default (like writing emails)
- Custom actions: special jobs YOU create for your business
- Actions can use: Apex code, Flows, or Prompt Templates
- Example action: "Create a return request" or "Send an email"

C) The Reasoning Engine - The Agent's Brain

Think of this as the agent's thinking process:

- It receives a question from a customer
- It figures out what the customer wants (intent)
- It decides which topic handles this type of work
- It picks the right actions to use
- It executes those actions in the correct order
- It talks back to the customer with the results

D) Session Event Logs - Checking Your Agent's Work

After the agent talks to a customer, you can look at the "logs" (records of what happened):

- You can see exactly what the agent did
- You can find problems if something went wrong
- It's like watching a replay of the conversation
- Use this for fixing bugs and improving your agent

E) Key Skills for This Section:

- Know the difference between standard actions (pre-built) vs. custom actions (you build)
- Understand what Apex, Flow, and Prompt Template actions are

- Know how to link topics to actions
 - Understand the reasoning engine's job
 - Know how to debug agents using session logs
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2. Prompt Engineering - 20% of the Exam (About 12 questions)

A "prompt" is an instruction you give to AI. Think of it like talking to a very smart assistant.

What You Need to Know:

A) What is Prompt Builder?

Prompt Builder is Salesforce's tool where you:

- Write instructions for the AI
- Add business data to make it personal
- Create templates (ready-to-use prompts)
- Test the prompts before using them

B) What is a Prompt Template?

A template is a repeating prompt you can use again and again. Think of it like a form with blanks you fill in:

Template: "Write a friendly email to {CUSTOMER_NAME} about {PRODUCT}."

When used, it becomes: "Write a friendly email to John Smith about Microsoft Office."

C) Types of Prompt Templates (Learn These!)

1. **Sales Email Template** - Helps salespeople write personalized emails to prospects
2. **Field Generation Template** - Fills in a field automatically (like writing a summary)
3. **Record Summary Template** - Takes a long record and creates a short summary
4. **Custom Template** - Any other type you need for your business

D) Grounding - Giving Your AI Real Information

"Grounding" means giving the AI real data from your company so it doesn't make things up.

Without Grounding:

- Customer: "Write an email to our top client"
- AI: "I don't know who your top client is, so I'll make something generic"
- Result: Bad email

With Grounding:

- Customer: "Write an email to our top client"
- AI: "I see from the data that John Smith is your top client. Here's a personal email for John..."
- Result: Great email!

E) What Can You Ground With? (Sources of Real Data)

1. **Record Merge Fields** - Regular Salesforce data
 - Example: Customer name, company, email from the Contact record
 - These are the most common type
2. **Flow Merge Fields** - Data from Salesforce Flows (automation workflows)
 - Example: The result of a calculation or logic
 - These let you use complex business logic
3. **Apex Merge Fields** - Code-based data (for developers)
 - Example: Calling an external API or complex calculation
 - These give the most power but need a developer
4. **Data Cloud DMO** - Big unified customer data
 - This is advanced - unified customer 360 views
 - Great for personalization
5. **Related Lists** - Connected records

- Example: If looking at an Account, pull related Opportunities

6. **Knowledge Articles** - Your FAQ/help information

- Example: Automatically find answers from your knowledge base

F) RAG - Retrieval Augmented Generation (Fancy Name, Simple Idea)

RAG means: "Go find the right information, then use it to answer."

Process:

1. Customer asks a question
2. System searches for related information (retrieval)
3. System uses that information to create the answer (augmentation)
4. AI gives a personalized, accurate answer

Real Example:

- Customer: "What's our return policy?"
- System: Searches knowledge base and finds return policy article
- AI: Uses that article to answer: "Our return policy is 30 days with receipt..."

G) Key Skills for This Section:

- Know what Prompt Builder is and when to use it
- Understand all 3 main template types
- Know what grounding means and WHY it matters
- Know all sources of grounding data
- Understand RAG and why it makes answers better

3. Data Cloud for Agentforce - 20% of the Exam (About 12 questions)

Data Cloud is like a special warehouse that holds organized customer information.

What You Need to Know:

A) What is Salesforce Data Cloud?

Think of Data Cloud as:

- A powerful storage system for customer data
- Works with Agentforce to give AI real information
- Connects data from many places
- Makes data easy for AI to search and use

B) Agentforce Data Libraries

A Data Library is:

- A collection of information your agent can use
- Like giving your agent a library card to look things up
- Can include: knowledge articles, PDFs, website info, database records
- Makes agents smarter and more accurate

C) How Agents Use Data Cloud:

The process works like this:

1. **You upload information** to a Data Library (maybe a handbook, FAQ, product info)
2. **Data Cloud processes it:**
 - Chops it into small, searchable pieces (chunking)
 - Creates an index (like a table of contents to find things fast)
 - Stores it in an organized way
3. **When a customer asks a question:**
 - Agent searches the index for related information
 - AI uses that real information to answer
 - The answer is accurate and from YOUR company

D) Retrievers - The Lookup Tools

A "retriever" is the tool that finds information in Data Cloud.

- **Default Retriever** - Salesforce's basic search (works for most cases)

- **Custom Retriever** - You build this for special needs (like searching with specific rules)

Think of retrievers like different ways to search:

- Default: "Google search" (general search)
- Custom: "Search only where the category is X" (specific search)

E) Key Skills for This Section:

- Know what Data Cloud is and what it does
 - Understand Data Libraries and why agents need them
 - Know the process: upload chunk index retrieve answer
 - Understand default vs. custom retrievers
 - Know that Data Cloud makes agents more accurate and trustworthy
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4. Deployment Lifecycle - 20% of the Exam (About 12 questions)

Deployment is moving your agent from where you test it to where real people use it.

What You Need to Know:

A) The Stages (Where Your Agent Lives)

Think of it like building a house:

1. Sandbox (Your Workshop)

- Where developers build and test
- No real customers see this
- You can break things here without problems
- Like a practice ground

2. Staging (The Dress Rehearsal)

- Optional middle step
- Very close to real thing

- Do final tests before going live
- Like a final dress rehearsal before opening night

3. Production (The Real Stage)

- Where real customers interact with your agent
- Real business happens here
- Can't just delete things
- Must be careful and tested

B) The Deployment Process (Steps in Order)

Step 1: Build and Test in Sandbox

- Create your agent with all topics, actions, and instructions
- Test it thoroughly with sample conversations
- Fix any problems

Step 2: Testing Center - Use Salesforce's Testing Tool

- Salesforce has a special testing area
- Type in what customers might ask
- See how the agent responds
- Find issues before production

Step 3: Create Package File (For Developers)

- Use Salesforce CLI (command line tool)
- Collect all agent pieces: agent definition, flows, Apex code, prompt templates
- Create a "package" ready to move
- Like packing a box for shipping

Step 4: Prepare Production Org

- Make sure Production has Einstein enabled (AI features turned on)
- Make sure Agentforce is turned on
- Make sure Data Cloud is set up if you're using it

- Create the agent user account

Step 5: Deploy to Production

- Move the package to production
- Validate that everything works
- Activate the agent
- Done!

C) Testing - How to Check Your Agent Works

Testing Center is the official testing tool:

- Type questions like a real customer would
- See the agent's response
- Check if the answer is good
- Look at the session logs to see what happened

Test Different Scenarios:

- Normal questions
- Edge cases (weird questions)
- Error scenarios
- Different types of users

D) Monitoring and Adoption - Keep It Running

After you launch:

1. **Watch Session Logs** - Look for problems
2. **Check Agent Performance** - Is it helping people?
3. **Get User Feedback** - What do people think?
4. **Make Improvements** - Update the agent based on feedback

E) Key Skills for This Section:

- Know the three environments: Sandbox Staging Production
- Know the deployment process steps in order

- Understand how to use Testing Center
 - Know what needs to be included when deploying (flows, code, templates)
 - Understand monitoring and adoption after launch
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5. Multi-Agent Interoperability - 5% of the Exam (About 3 questions)

This section is about multiple agents working together.

What You Need to Know:

A) What is Multi-Agent Interoperability?

"Interoperability" means "working together."

Imagine you have multiple agents:

- **Agent 1:** Handles sales questions
- **Agent 2:** Handles support questions
- **Agent 3:** Handles billing questions

When they "interoperate," they work together:

- If a customer asks Agent 1 about billing, Agent 1 hands off to Agent 3
- Agents can share information with each other
- Customers get the right agent for their problem

B) When Would You Use Multi-Agent?

- Large companies with complex needs
- When different departments need different agents
- When one agent needs help from another specialist agent
- When you want specialized agents for specific jobs

C) Key Skills for This Section:

- Understand what multi-agent means
- Know that agents can work together and pass conversations

- Know when to use multiple agents vs. one agent
 - Understand handoff scenarios
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IMPORTANT CONCEPT: The Einstein Trust Layer (Data Security)

This is VERY important but sometimes confusing. Let me explain simply:

What is the Einstein Trust Layer?

It's Salesforce's security system that protects your private information when using AI.

The Problem:

- AI systems are powerful but risky
- They might accidentally expose customer names, credit cards, or other private info
- External AI companies (like OpenAI) shouldn't see your secrets

The Solution (Einstein Trust Layer):

Before sending information to AI:

1. **Identifies private data** - Finds sensitive info like names, emails, SSNs
2. **Masks it** - Replaces it with generic placeholders like {PERSON_NAME}
3. **Sends to AI** - AI sees the placeholder, not the real info
4. **Gets answer back** - AI responds based on the placeholder
5. **Unmasks it** - Replaces placeholder with real info in the final answer

Example:

Original info: "Send an email to John Smith at john@company.com saying his credit card 4111-1111-1111-1111 is expiring."

With Trust Layer masking:

"Send an email to {PERSON_NAME} at {EMAIL} saying his credit card {CREDIT_CARD} is expiring."

AI sees safe version gives safe answer your real data stays safe!

Two Types of Masking:

1. **Pattern-Based** - Finds sensitive data by recognizing patterns
 - Recognizes SSNs (9 digits with format)
 - Recognizes credit cards
 - Recognizes names using AI models
2. **Field-Based** - Finds sensitive data marked in Salesforce
 - Uses Salesforce field labels that say "This is private"
 - Uses tags on fields that say "Don't share"

Key Point for the Exam:

- Data stays in Salesforce
 - Private information never goes to the LLM
 - Zero-retention agreement (OpenAI doesn't keep your data)
 - Everything is encrypted while traveling
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EXAM QUESTION TYPES: How Questions Are Asked

The exam has 4 common question formats:

Type 1: Scenario-Based Questions

Example:

"A financial services company wants their Agentforce agent to answer customer questions about account balances without exposing customer SSNs to external LLMs. Which feature should they use?"

- A. Prompt templates
- B. Einstein Trust Layer
- C. Flow actions
- D. Agent sessions

Answer: B (Einstein Trust Layer protects data from LLMs)

How to Spot Them: Look for real-world situations ("A company wants...")

Type 2: Concept Questions

Example:

"What is the primary purpose of grounding a prompt template?"

- A. To make prompts faster
- B. To make prompts more expensive
- C. To add real company data so AI responses are personalized and accurate
- D. To prevent agents from working

Answer: C (Grounding adds real data for accuracy)

How to Spot Them: They ask "What is..." or "Which is the purpose..."

Type 3: Process Questions

Example:

"Which order is correct for deploying an agent from sandbox to production?"

- A. Deploy Test Package Build
- B. Build Test Package Deploy
- C. Build Package Test Deploy
- D. Test Build Package Deploy

Answer: B (Build first, then test, then package, then deploy)

How to Spot Them: They ask about order or steps

Type 4: Choose Multiple Answers

Example:

"Which of the following can be used to ground a prompt template? (Choose two)"

- A. Apex code (Yes)
- B. Flow results (Yes)
- C. Emails (No)
- D. Record fields (Yes - but only choose 2)

Answer: A, B, D (All are correct)

How to Spot Them: They say "Choose one, two, or three..."

STUDY STRATEGY: How to Prepare for the Exam

Week 1: Read and Understand

- Read this guide 2-3 times
- Watch beginner-level YouTube videos on each topic
- Take notes on things that confuse you
- Join Salesforce Trailblazer community

Week 2: Go Deep

- Take Salesforce's free Trailhead modules (8 hours total)
- Do hands-on labs in your own Salesforce org
- Create sample prompt templates
- Build a simple test agent

Week 3: Practice

- Take practice exams (free ones on Trailhead)
- Review your wrong answers
- Look up concepts you missed
- Teach someone else about the topics (helps learning!)

Week 4: Final Review

- Review flashcards on difficult topics
 - Take another practice exam
 - Check your score is above 73%
 - Review weak areas one more time
 - Sleep well before the exam!
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COMMON MISTAKES TO AVOID

Mistake 1: Not understanding grounding

- **Why it matters:** 20% of exam is about grounding
- **How to avoid:** Know that grounding = adding real data to make AI smart

Mistake 2: Confusing "agents" with "prompts"

- **Why it matters:** Agents USE prompts, but they're different
- **How to avoid:** Agent = the worker; Prompt = the instruction

Mistake 3: Forgetting about data security

- **Why it matters:** Einstein Trust Layer questions will come up
- **How to avoid:** Remember: "Private data stays safe, AI only sees masks"

Mistake 4: Not knowing deployment steps

- **Why it matters:** 20% of exam is about this
- **How to avoid:** Memorize: Build Test Package Deploy

Mistake 5: Mixing up standard vs. custom actions

- **Why it matters:** Questions will ask when to use each
- **How to avoid:** Standard = pre-built; Custom = you build it

VOCABULARY: Easy Reference

Term	Simple Definition
AI Agent	Smart computer helper that understands requests and takes action
Topic	Category of work the agent can do (like "Return Help")
Action	Specific job the agent can do (like "Create return request")
Prompt	Instruction you give to AI
Grounding	Adding real company data to a prompt
Merge Fields	Placeholders that get replaced with real data (like {NAME})
RAG	Finding real information, then using it to answer
Data Library	Collection of information your agent can search through
Data Cloud	Salesforce system that stores and organizes data

Term	Simple Definition
Retriever	Tool that finds information in Data Cloud
Trust Layer	Security system that masks private data
Masking	Replacing private data with placeholders
Session Logs	Records of what an agent did in a conversation
Testing Center	Tool to test how agents respond to questions
Deployment	Moving agent from test to real use
Sandbox	Safe practice area for building and testing
Production	Real area where real customers use the agent

FINAL TIPS FOR TEST DAY

Do This:

- Arrive 15 minutes early
- Read questions slowly and carefully
- Think about real-world scenarios
- Mark difficult questions and come back to them
- Don't second-guess yourself too much
- Manage your time (105 minutes for 60 questions = about 1.5 minutes each)

Don't Do This:

- Rush through questions
- Choose the first answer without reading all options
- Leave questions blank (guess if unsure)
- Run out of time on hard questions and leave them blank
- Worry if you don't know an answer right away

RESOURCES TO USE (Free)

1. **Salesforce Trailhead** (Free official training)

- Module: Agentforce Specialist Certification Prep
 - Takes about 8 hours
 - Has practice questions and interactive labs
2. **YouTube Channels** (Free videos)
- Salesforce Trailhead official channel
 - "The Nad Coder" - Agentforce focused
 - "Krazy Cloud" - Simple explanations
3. **Salesforce Help Documentation** (Free)
- help.salesforce.com - official docs
 - Search for specific topics
4. **Trailblazer Community** (Free forums)
- Ask questions
 - Join study groups
 - Share tips with others
5. **Practice Exams** (Some free)
- Salesforce Trailhead (free)
 - WhizLabs (small fee but worth it)
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ONE MORE THING: Why This Certification Matters

Getting this certification shows:

- You understand modern AI in business
- You can build AI solutions that are safe and secure
- You understand how to make AI personal and useful
- You're ready for advanced Salesforce careers
- You can solve real business problems with AI

Companies are hiring for Agentforce specialist roles because AI is the future of customer service and sales. This certification opens doors!

Summary: Your Exam Cheat Sheet

Topic	% of Exam	Key Thing to Remember
AI Agents	35%	Agents = worker; Topics = categories; Actions = jobs; Reasoning Engine = brain
Prompt Engineering	20%	Grounding = real data; Makes prompts personal & accurate
Data Cloud	20%	Libraries store info; Retrievers find it; Makes agents smarter
Deployment	20%	Sandbox, Test Package, Production (in that order)
Multi-Agent	5%	Agents can work together and hand off work
BONUS: Trust Layer	Important	Masks private data; Keeps it safe; Never shared with AI

Good luck on your exam! You've got this!

Remember: This certification is not about memorization. it's about understanding how AI can help real businesses. Focus on understanding the concepts, and the test answers will come naturally.

Happy studying!