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Question 1. (Single Select)

What is the importance of Action Instructions when creating a custom Agent action?

A: Action Instructions define the expected user experience of an action.
B: Action Instructions tell the user how to call this action in a conversation.
C: Action Instructions tell the large language model (LLM) which action to use.

Correct Answer: A

Explanation:

In Salesforce Agentforce, custom Agent actions are designed to enable AI-driven agents to perform specific tasks within a conversational context. Action Instructions are a critical component when creating these actions because they define the expected user experience by outlining how the action should behave, what it should accomplish, and how it interacts with the end user. These instructions act as a blueprint for the action's functionality, ensuring that it aligns with the intended outcome and provides a consistent, intuitive experience for users interacting with the agent. For example, if the action is to "schedule a meeting," the Action Instructions might specify the steps (e.g., gather date and time, confirm with the user) and the tone (e.g., professional, concise), shaping the user experience.

Option B: While Action Instructions might indirectly influence how a user invokes an action (e.g., by making it clear what inputs are needed), they are not primarily about telling the user how to call the action in a conversation. That's more related to user training or interface design, not the instructions themselves.

Option C: The large language model (LLM) relies on prompts, parameters, and grounding data to determine which action to execute, not the Action Instructions directly. The instructions guide the action's design, not the LLM's decision-making process at runtime.

Thus, Option A is correct as it emphasizes the role of Action Instructions in defining the user experience, which is foundational to creating effective custom Agent actions in Agentforce.

Salesforce Agentforce Documentation: "Create Custom Agent Actions" (Salesforce Help: https://help.salesforce.com/s/articleView?id=sf.agentforce_custom_actions.htm&type=5)

Trailhead: "Agentforce Basics" module (https://trailhead.salesforce.com/content/learn/modules/agentforce-basics)

Question 2. (Single Select)

Universal Containers (UC) is creating a new custom prompt template to populate a field with generated output. UC enabled the Einstein Trust Layer to ensure AI Audit data is captured and monitored for adoption and possible enhancements. Which prompt template type should UC use and which consideration should UC review?

A: Field Generation, and that Dynamic Fields is enabled
B: Field Generation, and that Dynamic Forms is enabled
C: Flex, and that Dynamic Fields is enabled

Correct Answer: A

Explanation:

Salesforce Agentforce provides various prompt template types to support AI-driven tasks, such as generating text or populating fields. In this case, UC needs a custom prompt template to populate a field with generated output, which directly aligns with the Field Generation prompt template type. This type is designed to use generative AI to create field values (e.g., summaries, descriptions) based on input data or prompts, making it the ideal choice for UC's requirement. Additionally, UC has enabled the Einstein Trust Layer, a governance framework that ensures AI outputs are safe, explainable, and auditable, capturing AI Audit data for monitoring adoption and identifying improvement areas.

The consideration UC should review is whether Dynamic Fields is enabled. Dynamic Fields allow the prompt template to incorporate variable data from Salesforce records (e.g., case details, customer info) into the prompt, ensuring the generated output is contextually relevant to each record. This is critical for field population tasks, as static prompts wouldn't adapt to record-specific needs. The Einstein Trust Layer further benefits from this, as it can track how dynamic inputs influence outputs for audit purposes.

Option A: Correct. "Field Generation" matches the use case, and "Dynamic Fields" is a key consideration to ensure flexibility and auditability with the Trust Layer.

Option B: "Field Generation" is correct, but "Dynamic Forms" is unrelated. Dynamic Forms is a UI feature for customizing page layouts, not a prompt template setting, making this option incorrect.

Option C: "Flex" templates are more general-purpose and not specifically tailored for field

population tasks. While Dynamic Fields could apply, Field Generation is the better fit for UC's stated goal.

Option A is the best choice, as it pairs the appropriate template type (Field Generation) with a relevant consideration (Dynamic Fields) for UC's scenario with the Einstein Trust Layer.

Salesforce Agentforce Documentation: "Prompt Template Types" (Salesforce Help: https://help.salesforce.com/s/articleView?id=sf.agentforce_prompt_templates.htm&type=5)

Salesforce Einstein Trust Layer Documentation: "Monitor AI with Trust Layer" (https://help.salesforce.com/s/articleView?id=sf.einstein_trust_layer.htm&type=5)

Trailhead: "Build Prompt Templates for Agentforce" (https://trailhead.salesforce.com/content/learn/modules/build-prompt-templates-for-agentforce)

Question 3. (Single Select)

An Agentforce Specialist needs to create a prompt template to fill a custom field named Latest Opportunities Summary on the Account object with information from the three most recently opened opportunities. How should the Agentforce Specialist gather the necessary data for the prompt template?

A: Select the latest Opportunities related list as a merge field.
B: Create a flow to retrieve the opportunity information.
C: Select the Account Opportunity object as a resource when creating the prompt template.

Correct Answer: B

Explanation:

In Salesforce Agentforce, a prompt template designed to populate a custom field (like "Latest Opportunities Summary" on the Account object) requires dynamic data to be fed into the template for AI to generate meaningful output. Here, the task is to gather data from the three most recently opened opportunities related to an account. The most robust and flexible way to achieve this is by using a Flow (Option B). Salesforce Flows allow the Agentforce Specialist to define logic to query the Opportunity object, filter for the three most recent opportunities (e.g., using a Get Records element with a sort by CreatedDate descending and a limit of 3), and pass

this data as variables into the prompt template. This approach ensures precise control over the data retrieval process and can handle complex filtering or sorting requirements.

Option A: Selecting the "latest Opportunities related list as a merge field" is not a valid option in Agentforce prompt templates. Merge fields can pull basic field data (e.g., {!Account.Name}), but they don’t natively support querying or aggregating related list data like the three most recent opportunities.

Option C: There is no "Account Opportunity object" in Salesforce; this seems to be a misnomer (perhaps implying the Opportunity object or a junction object). Even if interpreted as selecting the Opportunity object as a resource, prompt templates don’t directly query related objects without additional logic (e.g., a Flow), making this incorrect.

Option B: Flows integrate seamlessly with prompt templates via dynamic inputs, allowing the Specialist to retrieve and structure the exact data needed (e.g., Opportunity Name, Amount, Close Date) for the AI to summarize.

Thus, Option B is the correct method to gather the necessary data efficiently and accurately.

Salesforce Agentforce Documentation: "Integrate Flows with Prompt Templates" (Salesforce Help: https://help.salesforce.com/s/articleView?id=sf.agentforce_flow_prompt_integration.htm&type=5)

Trailhead: "Build Flows for Agentforce" (https://trailhead.salesforce.com/content/learn/modules/flows-for-agentforce)

Question 4. (Single Select)

Universal Containers recently launched a pilot program to integrate conversational AI into its CRM business operations with Agentforce Agents. How should the Agentforce Specialist monitor Agents’ usability and the assignment of actions?

A: Run a report on the Platform Debug Logs.
B: Query the Agent log data using the Metadata API.
C: Run Agent Analytics.

Correct Answer: C

Explanation:

Monitoring the usability and action assignments of Agentforce Agents requires insights into how agents perform, how users interact with them, and how actions are executed within conversations. Salesforce provides Agent Analytics (Option C) as a built-in capability specifically designed for this purpose. Agent Analytics offers dashboards and reports that track metrics such as agent response times, user satisfaction, action invocation frequency, and success rates. This tool allows the Agentforce Specialist to assess usability (e.g., are agents meeting user needs?) and monitor action assignments (e.g., which actions are triggered and how often), providing actionable data to optimize the pilot program.

Option A: Platform Debug Logs are low-level logs for troubleshooting Apex, Flows, or system processes. They don't provide high-level insights into agent usability or action assignments, making this unsuitable.

Option B: The Metadata API is used for retrieving or deploying metadata (e.g., object definitions), not runtime log data about agent performance. While Agent log data might exist, querying it via Metadata API is not a standard or documented approach for this use case.

Option C: Agent Analytics is the dedicated solution, offering a user-friendly way to monitor conversational AI performance without requiring custom development.

Option C is the correct choice for effectively monitoring Agentforce Agents in a pilot program.

Salesforce Agentforce Documentation: "Agent Analytics Overview" (Salesforce Help: https://help.salesforce.com/s/articleView?id=sf.agentforce_analytics.htm&type=5)

Trailhead: "Agentforce for Admins" (https://trailhead.salesforce.com/content/learn/modules/agentforce-for-admins)

Question 5. (Single Select)

Universal Containers (UC) wants to implement an AI-powered customer service agent that can:

Retrieve proprietary policy documents that are stored as PDFs.

Ensure responses are grounded in approved company data, not generic LLM knowledge.

What should UC do first?

A: Set up an Agentforce Data Library for AI retrieval of policy documents.
B: Expand the AI agent's scope to search all Salesforce records.
C: Add the files to the content, and then select the data library option.

Correct Answer: A

Explanation:

To implement an AI-powered customer service agent that retrieves proprietary policy documents (stored as PDFs) and ensures responses are grounded in approved company data, UC must first establish a foundation for the AI to access and use this data. The Agentforce Data Library (Option A) is the correct starting point. A Data Library allows UC to upload PDFs containing policy documents, index them into Salesforce Data Cloud's vector database, and make them available for AI retrieval. This setup ensures the agent can perform Retrieval-Augmented Generation (RAG), grounding its responses in the specific, approved content from the PDFs rather than relying on generic LLM knowledge, directly meeting UC's requirements.

Option B: Expanding the AI agent's scope to search all Salesforce records is too broad and unnecessary at this stage. The requirement focuses on PDFs with policy documents, not all Salesforce data (e.g., cases, accounts), making this premature and irrelevant as a first step.

Option C: "Add the files to the content, and then select the data library option" is vague and not a precise process in Agentforce. While uploading files is part of setting up a Data Library, the phrasing suggests adding files to Salesforce Content (e.g., ContentDocument) without indexing, which doesn't enable AI retrieval. Setting up the Data Library (A) encompasses the full process correctly.

Option A: This is the foundational step—creating a Data Library ensures the PDFs are uploaded, indexed, and retrievable by the agent, fulfilling both retrieval and grounding needs.

Option A is the correct first step for UC to achieve its goals.

Salesforce Agentforce Documentation: "Set Up a Data Library" (Salesforce Help: https://help.salesforce.com/s/articleView?id=sf.agentforce_data_library.htm&type=5)

Salesforce Data Cloud Documentation: "Ground AI Responses with Data Cloud" (https://help.salesforce.com/s/articleView?id=sf.data_cloud_agentforce.htm&type=5)

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