

Salesforce Admin + Einstein AI & Agentforce Training TOC

MODULE 1: Salesforce Basics

- Salesforce & CRM overview
 - Editions & Lightning Experience
 - Admin role & real-world use cases
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MODULE 2: Navigation & Org Setup

- App Launcher
 - Setup vs App
 - Object Manager
 - Tabs, apps & navigation
 - Global search
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MODULE 3: User Management

- Users, licenses & profiles
 - Roles & role hierarchy
 - Password policies
 - Login access & restrictions
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MODULE 4: Security & Access

- OWD
 - Role hierarchy
 - Sharing rules & manual sharing
 - Field-level security
 - Permission Sets & Groups
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MODULE 5: Objects & Data Model

- Standard vs Custom Objects

- Field types
 - Lookup vs Master-Detail
 - Schema Builder
 - Real-world relationships
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MODULE 6: Data Management

- Data Import Wizard
 - Data Loader (basic)
 - Validation rules
 - Duplicate management
 - Data quality basics
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MODULE 7: Automation Overview

- Why automation
 - Workflow vs Process Builder vs Flow
 - Types of Flows
 - Why Flow is future
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MODULE 8: Record-Triggered Flows

- Before-save & After-save
 - Entry conditions
 - Update related records
 - Recursion handling
 - Best practices
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MODULE 9: Screen Flows

- Screen components
- User inputs
- Decisions & assignments

- Navigation
 - Guided flows
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MODULE 10: Flow Elements & Logic

- Get, Create, Update, Delete
 - Decisions & Loops
 - Assignments
 - Basic error handling
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MODULE 11: Business Logic

- Validation rules
 - Formula fields
 - Approval process (intro)
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MODULE 12: UI Customization

- Page layouts
 - Record types (intro)
 - Lightning App Builder
 - Dynamic visibility
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MODULE 13: Reports & Dashboards

- Report types
 - Tabular, Summary & Matrix
 - Dashboards & filters
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MODULE 14: Omni-Channel Basics

- Omni-Channel overview
- Business use cases
- Omni-Channel vs Queues

- Supported objects
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MODULE 15: Omni-Channel Configuration

- Enabling Omni-Channel
 - Routing (basic)
 - Queues & capacity
 - Work distribution
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MODULE 16: Presence Status

- Presence Status concepts
 - Available, Busy & custom statuses
 - Presence Configuration
 - User mapping
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Einstein AI & Agentforce (Basic Only)

MODULE 17: AI Basics & Einstein Overview

- AI & Generative AI (simple)
 - Einstein AI overview
 - Einstein vs ChatGPT
 - Where AI fits in Salesforce
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MODULE 18: AI Use Cases

- Sales productivity
 - Service efficiency
 - Admin & business users
 - Where AI should NOT be used
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MODULE 19: Einstein Setup Basics

- Einstein Setup navigation
 - Prompt Builder access
 - Permissions
 - Org limitations
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MODULE 20: Prompt Builder Basics

- Prompt template creation
 - Inputs & instructions
 - Preview & testing
 - Prompt lifecycle
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MODULE 21: Prompt Writing Fundamentals

- Writing clear prompts
 - Role-based & task-based prompts
 - Input handling
 - Common mistakes
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MODULE 22: Prompt Testing & Improvement

- Preview & resolved prompt
 - Output analysis
 - Basic optimization
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MODULE 23: Einstein Prompt Builder Demos

- AI text generation
 - Sales email writing
 - Case summary
 - Knowledge article draft
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MODULE 24: Agentforce Basics

- What is Agentforce
 - Agent vs Chatbot
 - Agent & prompt relationship
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MODULE 25: Agentforce Setup & Testing

- Agent creation
 - Assigning prompts
 - Testing responses
 - Accuracy improvement
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MODULE 26: Einstein AI with Salesforce

- Einstein with Sales
 - Einstein with Service
 - AI vs Flow (basic understanding)
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MODULE 27: Governance & Career Basics

- Responsible AI
- Data privacy basics
- Admin responsibility
- Career overview