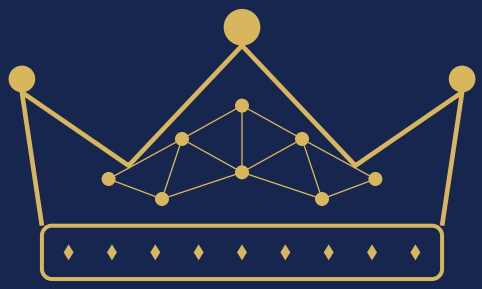
A COMPENDIUM FOR THE MODERN LEARNER



THE SALESFORCE & AGENTFORCE LEXICON

Essential Definitions to Master Salesforce Development & Agentforce

136 TERMS · 11 CHAPTERS · ONE COMPLETE FOUNDATION

MMXXVI

A Word Before We Begin

Every field has its own language, and Salesforce has one of the richest in technology. Admins, developers and architects speak in objects and flows, triggers and governor limits, and now in agents, subagents and grounding. Before you can build with confidence, you need that vocabulary at your fingertips. This lexicon gives you that foundation.

Inside you will find the essential terms of Salesforce development and Agentforce, arranged in eleven chapters that build on one another: from the platform and its data model, through automation, Apex, user interfaces, integration and DevOps, to Data 360 and the full lifecycle of AI agents.

Each entry has three parts: the **term**, a plain-language **definition**, and an *In practice* example that shows the idea at work in a real business. Salesforce renames products often, so where a name has changed recently, the former name is shown beside it.

Learn ten terms a day. Then open a free Trailhead Playground and try each one with your own hands. Within a few weeks, the language of Salesforce and Agentforce will be yours.

"The beginning of wisdom is the definition of terms."

— attributed to Socrates

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CHAPTER I

Salesforce Foundations

Before the first line of code, learn the ground you stand on: the platform, the org and the building blocks of every Salesforce app.

Customer Relationship Management *(CRM)*

Software that helps a business manage every interaction with its customers and prospects (sales, service, marketing and support) in one place.

IN PRACTICE *A coaching institute tracking every enquiry from first call to enrolment.*

Salesforce Platform

Salesforce's cloud platform on which its own apps (Sales Cloud, Service Cloud and others) and your custom apps are built. It provides the database, security, automation, user interface and AI layers.

IN PRACTICE *Building a custom admissions app without buying or managing a single server.*

Org *(Organisation)*

A single, private instance of Salesforce belonging to one company or developer, with its own data, users, configuration and code.

IN PRACTICE *Your company's live CRM is one org; your free practice environment is another.*

Production Org

The live org that real users work in every day. Changes here affect the business directly, so they are deployed carefully after testing.

IN PRACTICE *The org your sales team logs into on Monday morning.*

Sandbox

A copy of a production org used for development, testing and training without risking live data. Types include Developer, Developer Pro, Partial Copy and Full sandboxes.

IN PRACTICE *Testing a new discount rule in a sandbox before releasing it to 200 sales reps.*

Multitenant Architecture

A design in which many customers share the same underlying infrastructure and code base while their data stays securely separated. It is why Salesforce enforces limits and upgrades everyone at once.

IN PRACTICE *Like flats in one apartment block: shared building, separate locked homes.*

Metadata

Data that describes your org's configuration: objects, fields, page layouts, flows, Apex code and permissions. Salesforce apps are largely defined as metadata, which is what developers deploy.

IN PRACTICE *The definition of a 'Fee Receipt' object, as opposed to the actual receipts stored in it.*

Object

A database table in Salesforce that stores a particular type of information. Standard objects come built in; custom objects are created by you and end in __c.

IN PRACTICE *Account, Contact and Opportunity are standard; Course__c is custom.*

Record

A single row of data in an object, such as one customer, one case or one order. Every record has a unique 15- or 18-character Record ID.

IN PRACTICE *The Account record for 'Sri Lakshmi Traders, Vijayawada'.*

Field

A column in an object that stores one piece of information about each record, with a data type such as Text, Number, Date, Picklist or Currency.

IN PRACTICE *A Currency field 'Course Fee' holding ₹25,000.*

Release

Salesforce upgrades every org three times a year with the Spring, Summer and Winter releases, each bringing new features. Developers should read release notes and test in a preview sandbox.

IN PRACTICE *Checking that your Apex still behaves after the Winter release.*

AppExchange

Salesforce's marketplace of ready-made apps, components and consulting services that can be installed into an org.

IN PRACTICE *Installing a WhatsApp messaging app instead of building one from scratch.*

Trailhead

Salesforce's free, gamified online learning platform with modules, hands-on challenges and free practice orgs (Trailhead Playgrounds).

IN PRACTICE *Completing an Apex module and earning a badge.*

CHAPTER II

Data Model & Security

Design the data right and secure it well. Every good Salesforce solution rests on these two pillars.

Lookup Relationship

A loose link between two objects. The child record can exist without the parent, and each keeps its own owner and sharing.

IN PRACTICE *A Case that optionally looks up to the Product it is about.*

Master-Detail Relationship

A tight parent-child link. The detail record cannot exist without its master, inherits its sharing and is deleted along with it.

IN PRACTICE *Invoice Line Items that belong to an Invoice.*

Junction Object

A custom object with two master-detail relationships, used to create a many-to-many relationship between two objects.

IN PRACTICE *Enrolment__c linking Students and Courses, since one student takes many courses.*

Schema Builder

A visual tool that shows objects, fields and relationships as a diagram and lets you create them by drag and drop.

IN PRACTICE *Viewing the full data model of a hospital app on one screen.*

Record Type

A way to offer different page layouts, picklist values and business processes for different kinds of records within the same object.

IN PRACTICE *'Retail Customer' and 'Corporate Customer' record types on Account.*

Formula Field

A read-only field whose value is calculated automatically from other fields using a formula.

IN PRACTICE *Balance Due = Course Fee – Amount Paid.*

Roll-Up Summary Field

A field on a master record that calculates a COUNT, SUM, MIN or MAX from its related detail records.

IN PRACTICE *Total Invoice Amount summing all its line items.*

Validation Rule

A rule that checks data when a record is saved and blocks the save with an error message if the condition is not met.

IN PRACTICE *Stopping a save when a mobile number is not exactly 10 digits.*

Profile

Defines a user's baseline permissions: which objects, fields, apps and system features they can access. Every user has exactly one profile.

IN PRACTICE *A 'Counsellor' profile that can edit Leads but not delete them.*

Permission Set

A collection of permissions that can be added to users on top of their profile, granting extra access without creating new profiles. Salesforce recommends managing access mainly with permission sets.

IN PRACTICE *Granting refund approval to just three senior agents.*

Permission Set Group

A bundle of permission sets assigned together, usually representing a job role.

IN PRACTICE *A 'Sales Manager' group combining reporting, forecasting and approval permissions.*

Organisation-Wide Defaults *(OWD)*

The baseline record-level access for each object, such as Private, Public Read Only or Public Read/Write. Other sharing tools can only open access further.

IN PRACTICE *Setting Opportunities to Private so reps see only their own deals.*

Role Hierarchy

A tree of roles that lets users higher up see and work with records owned by people below them.

IN PRACTICE *A regional manager in Chennai seeing every deal owned by her team.*

Sharing Rule

An automatic rule that opens record access to groups or roles based on record ownership or field criteria.

IN PRACTICE *Sharing all Hyderabad Leads with the Hyderabad branch team.*

Field-Level Security *(FLS)*

Controls whether a user can see or edit a specific field, regardless of their access to the record.

IN PRACTICE *Hiding the Salary field from everyone except HR.*

CHAPTER III

Declarative Automation

Clicks before code: automate business processes with powerful visual tools, and know when to reach for code instead.

Declarative Development *(Clicks, not Code)*

Building functionality with point-and-click tools such as Flow, validation rules and Lightning App Builder instead of writing code. A good developer checks for a declarative option first.

IN PRACTICE *Automating a welcome email with a Flow rather than an Apex trigger.*

Flow

Salesforce's main automation tool. A flow is a series of steps that can create, update or delete records, make decisions, call actions and guide users through screens.

IN PRACTICE *Automatically creating a follow-up task when a lead is marked 'Hot'.*

Flow Builder

The visual canvas used to design, debug and activate flows.

IN PRACTICE *Dragging Decision and Update Records elements to build an approval path.*

Record-Triggered Flow

A flow that runs automatically when a record is created, updated or deleted. It can run before the save (fast field updates) or after the save (related records and actions).

IN PRACTICE *Setting a Case's priority to High whenever the customer is a premium member.*

Screen Flow

A flow with screens that guides a user step by step through a process, collecting input along the way.

IN PRACTICE *A guided form for a counsellor to register a walk-in student.*

Schedule-Triggered Flow

A flow that runs automatically at a set time and frequency over a batch of records.

IN PRACTICE *Every morning at 8 AM, flagging payments overdue by more than 7 days.*

Autolaunched Flow

A flow with no screens that runs in the background when called from another flow, Apex, a button, an API or an agent.

IN PRACTICE *A reusable 'Calculate GST' flow called by several processes.*

Approval Process

An automated process that routes a record to one or more people for approval, locking it and recording each decision.

IN PRACTICE *Discounts above 15% going to the branch head for approval.*

Order of Execution

The fixed sequence of steps Salesforce follows when a record is saved: validation rules, before-save flows and triggers, the save, after-save triggers and flows, and more. Knowing it prevents conflicts and surprises.

IN PRACTICE *Understanding why a field set in an after-save flow does not appear in a before trigger.*

Custom Metadata Type

Configurable settings stored as metadata, so they can be deployed between orgs and read by flows and Apex without hard-coding values.

IN PRACTICE *Storing GST rates per state so code reads them instead of hard-coding 18%.*

CHAPTER IV

Apex Programming

When clicks are not enough, Apex gives you full control: strongly typed, cloud-native code that runs inside Salesforce.

Apex

Salesforce's strongly typed, object-oriented programming language, similar to Java, that runs on Salesforce servers to add complex business logic.

IN PRACTICE *Writing custom fee-calculation logic with multiple discount slabs.*

Apex Class

A template that groups variables and methods (functions) into reusable code. Most Apex logic lives in classes.

IN PRACTICE *A FeeCalculator class with a calculateDiscount() method.*

Apex Trigger

Apex code that runs automatically before or after records are inserted, updated, deleted or undeleted.

IN PRACTICE *A trigger that prevents deleting an Account that still has open orders.*

Trigger Context Variables

Built-in variables such as Trigger.new, Trigger.old, Trigger.isInsert and Trigger.isBefore that tell a trigger which records changed and why it is running.

IN PRACTICE *Comparing Trigger.old and Trigger.new to detect a status change.*

Trigger Handler Pattern

A best practice of keeping one trigger per object, containing almost no logic, and delegating the work to a separate handler class. It keeps code organised and testable.

IN PRACTICE *AccountTrigger calls AccountTriggerHandler.afterUpdate().*

SOQL *(Salesforce Object Query Language)*

The query language used to read records from Salesforce objects, similar to SQL's SELECT statement.

IN PRACTICE *SELECT Name, Phone FROM Account WHERE BillingCity = 'Pune'*

SOSL *(Salesforce Object Search Language)*

A language for text searches across multiple objects at once.

IN PRACTICE *Finding 'Ramesh' across Leads, Contacts and Accounts in a single search.*

DML *(Data Manipulation Language)*

Statements that change data in Salesforce: insert, update, upsert, delete, undelete and merge.

IN PRACTICE *insert newStudents; saves a whole list of new records.*

Governor Limits

Runtime limits that Salesforce enforces on every transaction so that no single tenant overuses shared resources. Exceeding one throws an exception that cannot be caught.

IN PRACTICE *A maximum of 100 SOQL queries and 150 DML statements in one synchronous transaction.*

Bulkification

Writing code that handles many records at once, with no SOQL or DML inside loops, so it stays within governor limits when 200 records arrive together.

IN PRACTICE *Querying all related contacts once, outside the loop, and storing them in a Map.*

Asynchronous Apex

Apex that runs later in the background, with higher limits, for long or heavy work. The main types are future methods, Queueable, Batch and Scheduled Apex.

IN PRACTICE *Sending 10,000 fee reminders without making the user wait.*

Future Method

A simple asynchronous method marked @future that runs in its own transaction. Often used for callouts to external systems after a record is saved.

IN PRACTICE *Calling an SMS gateway after a payment is recorded.*

Queueable Apex

A more flexible form of asynchronous Apex that accepts complex data types, returns a job ID for monitoring and can chain one job to the next.

IN PRACTICE *Processing an order, then chaining a second job to update stock.*

Batch Apex

Apex that processes very large numbers of records in smaller chunks (200 by default), each in its own transaction with fresh limits.

IN PRACTICE *Recalculating loyalty points for 5 lakh customers overnight.*

Scheduled Apex

Apex that runs automatically at a chosen time using the Schedulable interface and a CRON expression.

IN PRACTICE *Running a cleanup job every Sunday at 2 AM.*

Test Class

Apex code marked @isTest that checks other code works as expected. Test data is created inside the test and is never saved permanently.

IN PRACTICE *A test that inserts 200 accounts to confirm a trigger is bulk-safe.*

Code Coverage

The percentage of Apex lines executed by tests. Salesforce requires at least 75% overall coverage, with all tests passing, to deploy Apex to production.

IN PRACTICE *Running all tests before a deployment to check you are above 75%.*

Invocable Method

An Apex method marked @InvocableMethod so it can be called from Flow, and from Agentforce as an agent action.

IN PRACTICE *An invocable method that checks a customer's order status for an agent.*

CHAPTER V

User Interface Development

From drag-and-drop pages to modern web components: how users see and touch your Salesforce applications.

Lightning Experience

Salesforce's modern user interface, built from reusable components and designed for productivity on desktop and mobile.

IN PRACTICE *The fast, component-based screens most orgs use today.*

Lightning App Builder

A drag-and-drop tool for building record pages, home pages and app pages from standard and custom components.

IN PRACTICE *Adding a payment-history component to the Student record page.*

Dynamic Forms

A Lightning App Builder feature that lets you place individual fields and sections on a page and show or hide them with visibility rules.

IN PRACTICE *Showing scholarship fields only when 'Scholarship Applied' is ticked.*

Lightning Web Components *(LWC)*

Salesforce's modern framework for building custom UI components using standard HTML, JavaScript and CSS. Each component lives in a bundle of files.

IN PRACTICE *A custom component showing a student's course progress as a chart.*

Aura Components

Salesforce's earlier framework for Lightning components. It still works and can contain LWCs, but new development should use LWC.

IN PRACTICE *Maintaining an older Aura component while new features are built in LWC.*

Decorators *(@api, @track, @wire)*

Special markers in LWC JavaScript. @api makes a property public to parent components, @wire connects to Salesforce data, and @track marks objects whose inner changes should re-render.

IN PRACTICE *Passing a recordId into a child component through an @api property.*

Wire Service

The LWC mechanism that reactively fetches Salesforce data or calls Apex and refreshes the component when parameters change.

IN PRACTICE *@wire(getRecord) loading an Account's details as soon as the page opens.*

Lightning Data Service *(LDS)*

A built-in data layer that loads, caches and saves records for components without writing Apex, while respecting sharing and field-level security.

IN PRACTICE *Using lightning-record-form to edit a Contact with no Apex at all.*

Salesforce Lightning Design System *(SLDS)*

Salesforce's design system of CSS styles, icons and UI patterns that makes custom components look and feel native.

IN PRACTICE *Using SLDS classes so a custom card matches standard Salesforce cards.*

Visualforce

Salesforce's older, tag-based page framework, similar to HTML with server-side controllers. Still found in many orgs, especially for PDFs and legacy pages.

IN PRACTICE *Rendering a printable fee receipt as a PDF.*

Experience Cloud

The product for building branded portals and websites for customers, partners or students, connected to your Salesforce data.

IN PRACTICE *A student portal for downloading certificates and raising queries.*

CHAPTER VI

Integration & APIs

No system is an island. These are the doors through which Salesforce talks to the rest of the world.

Application Programming Interface *(API)*

A defined way for one system to request data or services from another. Salesforce offers several APIs for different needs.

IN PRACTICE *A website form creating a Lead in Salesforce through an API.*

REST API

Salesforce's lightweight web API that uses standard HTTP methods and JSON. The most common way for web and mobile apps to work with Salesforce data.

IN PRACTICE *A mobile app fetching a customer's open cases with a GET request.*

SOAP API

An older, XML-based Salesforce API with strict contracts, still used by many enterprise systems.

IN PRACTICE *A legacy ERP system syncing invoices into Salesforce.*

Bulk API

An API designed for loading or extracting very large data volumes asynchronously in batches.

IN PRACTICE *Migrating 20 lakh historic customer records into a new org.*

Apex Callout

An HTTP request made from Apex to an external system's API, to send or fetch data.

IN PRACTICE *Calling a payment gateway to confirm a UPI transaction status.*

Apex REST Service

A custom REST endpoint you write in Apex (with @RestResource) so external systems can call your own business logic.

IN PRACTICE *An endpoint that a partner website calls to check seat availability.*

Named Credential

A secure, central place to store an external endpoint's URL and authentication, so code and flows can make callouts without hard-coding secrets.

IN PRACTICE *Storing the SMS provider's API key safely instead of in code.*

Connected App

A configuration that lets an external application connect to Salesforce securely using OAuth and defines what it can access. Salesforce now also offers External Client Apps as a newer alternative.

IN PRACTICE *Registering your React web app so it can sign users in with Salesforce.*

OAuth 2.0

The industry-standard protocol for granting an app limited access to an account without sharing the user's password, using access tokens.

IN PRACTICE *'Log in with Salesforce' on a third-party app.*

Platform Events

Custom event messages that apps publish and subscribe to, enabling real-time, event-driven communication inside and outside Salesforce.

IN PRACTICE *Publishing an 'Order Shipped' event that a warehouse system listens for.*

Change Data Capture *(CDC)*

A stream of events that Salesforce publishes automatically whenever records are created, updated, deleted or undeleted, so external systems stay in sync.

IN PRACTICE *Keeping a data warehouse updated the moment an Account changes.*

MuleSoft

Salesforce's integration platform for connecting many applications, databases and APIs through reusable, managed integrations.

IN PRACTICE *Connecting Salesforce, SAP and a banking core system through one integration layer.*

CHAPTER VII

Developer Tools & DevOps

Professional developers work in source control, automate deployments and now build alongside AI coding agents.

Salesforce DX *(SFDX)*

Salesforce's modern, source-driven developer experience: a set of tools and practices for building, testing and deploying with version control.

IN PRACTICE *Keeping all org metadata in a Git repository and deploying from it.*

Salesforce CLI *(sf)*

The command-line tool for creating orgs, retrieving and deploying metadata, running tests and automating development tasks.

IN PRACTICE *sf project deploy start to deploy code to a sandbox.*

Dev Hub

An org with special features enabled that lets you create and manage scratch orgs and second-generation packages.

IN PRACTICE *Turning on Dev Hub in your company's production org.*

Scratch Org

A temporary, configurable org created from source for development and testing. It lasts 7 days by default and up to 30 days.

IN PRACTICE *Spinning up a clean org to test one feature, then discarding it.*

VS Code Salesforce Extensions

Extensions for Visual Studio Code that add Apex and LWC support, org connection, deployment and debugging tools.

IN PRACTICE *Writing Apex with code completion and deploying with a right-click.*

Metadata API

The API used to retrieve, deploy, create and delete an org's configuration and code.

IN PRACTICE *Deployment tools use it behind the scenes to move metadata between orgs.*

Change Set

A point-and-click way to send metadata from one connected org to another, such as from a sandbox to production. Simple, but without version control.

IN PRACTICE *An admin moving a new flow and two fields to production.*

Unlocked Package

A second-generation (2GP) package for organising and deploying your own metadata as versioned, upgradeable units.

IN PRACTICE *Packaging an admissions module so it installs cleanly in any org.*

DevOps Center

Salesforce's tool for managing changes and releases through a pipeline with source control, built for teams of admins and developers.

IN PRACTICE *Moving a work item from Development to UAT to Production in one view.*

Agentforce Vibes

Salesforce's AI-assisted development experience that lets developers describe what they want in natural language and have an AI agent generate and explain Salesforce code and metadata in their IDE.

IN PRACTICE *Asking it to 'create an LWC that lists today's follow-ups'.*

Headless 360

Salesforce's architecture that exposes the platform's capabilities as APIs, MCP tools and CLI commands, so humans and AI agents can build and act without going through the browser UI.

IN PRACTICE *A coding agent in Claude or Cursor updating Salesforce metadata directly.*

CHAPTER VIII

Data 360 & the Data Foundation

Agents are only as smart as the data beneath them. Data 360 unifies that data into trusted, real-time context.

Data 360 *(formerly Data Cloud)*

Salesforce's real-time data platform that ingests and unifies data from Salesforce and external systems into one view of each customer. It supplies the context that powers Agentforce.

IN PRACTICE *Combining website visits, app usage and CRM records into one customer view.*

Data Stream

A connection that brings data from a source, such as Salesforce CRM, a website or cloud storage, into Data 360.

IN PRACTICE *A stream pulling payment records from Amazon S3 every hour.*

Data Model Object *(DMO)*

A standardised object in Data 360 onto which incoming data is mapped, so data from different sources speaks the same language.

IN PRACTICE *Mapping 'cust_mobile' and 'PhoneNo' from two sources to one Phone field.*

Identity Resolution

The process of matching records from different sources that belong to the same person and merging them using match and reconciliation rules.

IN PRACTICE *Recognising that a web sign-up and a walk-in enquiry are the same student.*

Unified Profile

The single, consolidated customer profile created by identity resolution.

IN PRACTICE *One profile showing a student's enquiries, payments and support tickets.*

Calculated Insight

A metric computed in Data 360 across unified data, used for segmentation, personalisation and agents.

IN PRACTICE *Lifetime value or 'days since last login' for each learner.*

Segment

A group of customers selected by shared attributes or behaviour, which can be activated in marketing or other systems.

IN PRACTICE *Learners who attended the free demo but have not enrolled.*

Zero Copy

Integration that lets Data 360 use data held in external platforms such as Snowflake or Databricks without copying or moving it.

IN PRACTICE *Querying a company's data warehouse in place instead of duplicating it.*

Vector Search

Searching unstructured content (PDFs, articles, transcripts) by meaning, using embeddings stored in a search index. It is the retrieval step behind RAG in Salesforce.

IN PRACTICE *Finding the right clause in a 200-page policy PDF for a customer's question.*

CHAPTER IX

Agentforce Fundamentals

Meet the digital workforce: autonomous AI agents that reason over your data and take action inside Salesforce.

Agentforce

Salesforce's platform for building, deploying and managing autonomous AI agents that work alongside people across sales, service, marketing, commerce and more.

IN PRACTICE *A service agent that resolves order-status queries around the clock.*

Agentforce 360

Salesforce's name, introduced at Dreamforce 2025, for its combined offering of Agentforce, Data 360, Customer 360 apps and Slack, presented as one platform for the agentic enterprise.

IN PRACTICE *Using agents, unified data and Slack together for one service process.*

AI Agent

Software that understands a goal expressed in natural language, reasons about how to achieve it, and takes actions using tools and data, with some autonomy.

IN PRACTICE *An agent that checks a policy, calculates a refund and updates the case.*

Atlas Reasoning Engine

The 'brain' of Agentforce. It interprets each request, selects the right subagent and actions, plans the steps and evaluates the results in a reason–act–observe loop.

IN PRACTICE *Deciding that 'where is my order?' needs the order-lookup action.*

Subagent *(formerly Topic)*

A specialised unit of an agent with its own scope, instructions and actions, covering one category of requests or job to be done. Salesforce renamed topics to subagents.

IN PRACTICE *A 'Fee Payments' subagent and a separate 'Course Information' subagent.*

Classification Description

The short description of a subagent that the reasoning engine reads to decide whether a user's request belongs to it. Clear wording here drives accurate routing.

IN PRACTICE *'Handles questions about fee instalments, receipts and refunds.'*

Instructions

Natural-language guidance inside a subagent that shapes tone, conversation flow and when to use which action. Instructions guide the model but are not guaranteed rules.

IN PRACTICE *'Always confirm the student's registered mobile number before sharing fee details.'*

Agent Action

A tool an agent can use to get information or do work. Actions are built from Flows, Apex invocable methods, prompt templates or APIs.

IN PRACTICE *A 'Check Order Status' action backed by an autolaunched flow.*

Standard Action

A ready-made action provided by Salesforce, such as querying records, summarising a record or drafting an email.

IN PRACTICE *Using the built-in 'Summarize Record' action on a long case.*

Agent Script *(Agentforce Script)*

Salesforce's human-readable scripting language for defining an agent's configuration, business logic, actions and reasoning instructions in a single text file.

IN PRACTICE *Scripting that a refund above ₹10,000 must always go to a human.*

Hybrid Reasoning

Agentforce's approach of combining flexible, LLM-based reasoning with deterministic, rule-based steps in the same agent, so business-critical logic always runs exactly as written.

IN PRACTICE *Letting the LLM chat naturally while a scripted rule always verifies identity first.*

Variables

Stored values an agent can read and set during a conversation. Session variables carry facts, such as the customer's name, between subagents and actions.

IN PRACTICE *Remembering the verified order number across the whole conversation.*

Filters

Conditions that control which subagents, actions or retrievers are available to the model on each turn, keeping the agent focused and safe.

IN PRACTICE *Hiding the refund action until the customer's identity is verified.*

Escalation *(Handoff)*

Transferring a conversation from an agent to a human, with full context, when a request is out of scope, sensitive or the customer asks for a person. Often routed with Omni-Channel.

IN PRACTICE *Handing an angry customer to a live agent with the chat summary attached.*

CHAPTER X

Prompts, Grounding & Trust

Accurate answers come from good prompts and trusted data, and enterprise AI must protect that data at every step.

Prompt Builder

Salesforce's tool for creating, testing and managing reusable prompt templates grounded in your Salesforce data.

IN PRACTICE *Building a prompt that drafts a personalised follow-up email for each lead.*

Prompt Template

A reusable prompt with placeholders that are filled with real record data at run time. Templates can power buttons, flows, Apex and agent actions.

IN PRACTICE *'Summarise the last five interactions with {!Account.Name}.'*

Merge Field

A placeholder in a template that inserts a specific value, such as a field from the current record, when the prompt runs.

IN PRACTICE *{!Contact.FirstName} becoming 'Priya'.*

Grounding

Supplying the model with relevant, trusted business data inside the prompt so its answer is based on facts rather than general knowledge.

IN PRACTICE *Grounding a reply in the customer's actual order record.*

Retrieval-Augmented Generation *(RAG)*

Retrieving relevant passages from your knowledge sources and adding them to the prompt before the model answers. Salesforce uses Data 360 search indexes and retrievers for this.

IN PRACTICE *An agent answering from the official refund policy document.*

Retriever

A configured component that searches a Data 360 search index and returns the most relevant content to a prompt template or agent.

IN PRACTICE *A retriever over all course brochures for a sales agent.*

Einstein Trust Layer

Salesforce's built-in security layer for generative AI. It handles secure data retrieval, dynamic grounding, data masking, zero data retention with model providers, toxicity detection and an audit trail.

IN PRACTICE *Ensuring customer phone numbers are masked before a prompt reaches the model.*

Data Masking

Replacing sensitive data, such as names, phone numbers or account numbers, with placeholders before a prompt is sent to a language model, and restoring it afterwards.

IN PRACTICE *A customer's mobile number replaced with a token in the outgoing prompt.*

Zero Data Retention

An agreement under which external model providers do not store or train on the prompts and responses sent through the Einstein Trust Layer.

IN PRACTICE *A bank's customer data never kept by the model provider.*

Toxicity Detection

Automatic scoring of AI-generated content for harmful, offensive or inappropriate language so it can be flagged or blocked.

IN PRACTICE *Flagging an AI-drafted reply that contains an inappropriate phrase.*

Bring Your Own LLM *(BYO LLM)*

Connecting your organisation's own or preferred large language model to Salesforce and using it in prompts and agents through the platform's model management tools.

IN PRACTICE *A company using its own approved model hosted on its cloud account.*

CHAPTER XI

Building, Testing & Running Agents

From first draft to production: the tools and practices that turn a promising agent into a reliable digital colleague.

Agentforce Studio

The unified workspace for the full agent lifecycle: build, test, deploy, monitor and optimise.

IN PRACTICE *Moving from draft to live agent without leaving one environment.*

Agentforce Builder

The AI-assisted builder where you describe agent behaviour in plain language, configure subagents and actions, and write Agent Script.

IN PRACTICE *Typing 'help students reschedule a demo class' and refining the generated plan.*

Testing Center

Agentforce's tool for testing agents at scale before deployment, by running many sample requests and checking that the right subagents and actions are chosen and responses are correct.

IN PRACTICE *Running 200 test questions after every change to the agent.*

Utterance

A single message or phrase a user sends to an agent. Testing with many varied utterances reveals how well an agent understands real users.

IN PRACTICE *'mera order kab aayega?' as well as 'Where's my order?'*

Agentforce Observability

Monitoring and analysis of live agent behaviour (sessions, reasoning, actions and outcomes) to find where logic needs refining. Agent Analytics streams usage data to Data 360 for reports.

IN PRACTICE *Spotting that 30% of refund chats are escalated and fixing the instructions.*

Context Engineering

Designing exactly what information, instructions and tools an agent sees at each step, so it reasons reliably. It goes beyond writing a single prompt.

IN PRACTICE *Giving the billing subagent only payment data and payment actions.*

Deployment Channel

The surface through which an agent meets its users: web chat, messaging apps, Slack, voice, email or inside Salesforce itself.

IN PRACTICE *Publishing a service agent on the website chat and on WhatsApp.*

Model Context Protocol *(MCP)*

An open standard for connecting AI agents to tools and data. Salesforce provides MCP servers, such as the Headless 360 and Data 360 MCP Servers, so authorised agents can securely use Salesforce capabilities.

IN PRACTICE *An agent in Claude securely reading Salesforce data through an MCP server.*

AgentExchange

Salesforce's marketplace for agent-ready actions, templates, MCP servers and partner solutions that extend Agentforce.

IN PRACTICE *Installing a ready-made shipping-tracker action for a commerce agent.*

Human-in-the-Loop

Designing agents so that people review or approve high-impact steps before they take effect.

IN PRACTICE *An agent drafts a £50,000 refund but a manager approves it.*

Guardrails

The combined rules, filters, instructions, permissions and trust-layer protections that keep an agent's behaviour safe, accurate and within scope.

IN PRACTICE *Preventing a sales agent from promising discounts it is not authorised to give.*

Agent User

The Salesforce user identity an agent runs as. Its profile and permission sets decide which data and actions the agent can access, so it should follow the principle of least privilege.

IN PRACTICE *Giving a service agent read access to Orders but no access to Salary data.*

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