Day 1: Introduction to Salesforce Copilot

Overview of Salesforce Copilot

- o Introduction to Salesforce Copilot
- Benefits and use cases of Copilot
- o Overview of Copilot features and capabilities

• Setting Up Your Salesforce Developer Org

- o Creating a Salesforce developer org
- o Enabling Copilot features in your org
- Navigating the Copilot interface

Getting Started with Copilot

- Introduction to Copilot dashboards
- Connecting datasets to Copilot
- o Exploring the Copilot user interface

Day 2: Building and Using Copilot Workflows

Copilot Workflow Builder

- Overview of Workflow Builder
- Creating your first workflow
- Understanding workflow triggers and actions

• Hands-On: Building a Workflow

- Selecting objects and fields for workflows
- o Defining workflow criteria and actions
- Reviewing and deploying workflows

Best Practices for Workflows

- Ensuring data accuracy
- o Monitoring workflow performance
- Managing and updating workflows

Day 3: Integrating Copilot with Salesforce Processes

• Copilot and Salesforce Integration

- Connecting Copilot with standard and custom objects
- Using Copilot to enhance Salesforce automation
- Real-world examples of Copilot integration

• Hands-On: Integrating Copilot

- o Setting up integration points in your Salesforce org
- Designing integrated workflows
- Automating business processes with Copilot

Advanced Integration Techniques

- Leveraging APIs for Copilot integration
- Handling complex data operations
- o Integrating Copilot with third-party applications

Day 4: Copilot Analytics and Reporting

Copilot Analytics

- Overview of Copilot Analytics features
- Creating and customizing reports
- Building dashboards with Copilot data

• Hands-On: Creating Copilot Reports and Dashboards

- o Importing data into Copilot Analytics
- Designing and customizing reports
- Sharing insights and visualizations

Data Insights and Decision Making

- Using Copilot data for strategic decisions
- Exploring advanced analytics features
- Real-world applications of Copilot Analytics

Day 5: Advanced Copilot Management and Governance

• Optimizing Copilot Performance

- Best practices for optimizing Copilot workflows
- Troubleshooting common issues
- o Ensuring scalability and reliability

• Copilot Security and Compliance

- Managing data privacy and security
- o Ensuring compliance with industry regulations
- o Governance policies for Copilot usage

Review and Q&A

- Recap of key concepts
- o Open forum for addressing specific questions and scenarios
- Final assessment and feedback