

SF CA



2026

Dreamforce



Agentforce Vibes Setup Guide Workshop Guide

Your path to Success at Dreamforce 2026

Dreamforce 2026

Financial Services Cloud Workshop



UCM Service Processes + Banking Service Assistant — Self-Serve Setup Guide (Agentforce Vibes)

End state: Using **Agentforce Vibes**, you will stand up a shipped Agentforce (Financial Services) **Unified Catalog Management (UCM)** service process — **Order CheckBook** — on the standard object model (Banking-on-Core), plus its **Banking Service Assistant** Employee-Agent topic (*Checkbook Ordering*). No managed package, no custom code to maintain. You point Agentforce Vibes at a field-tested kit, paste one prompt, and Vibes audits your org, deploys what it can, and guides you through the hands-on UI steps. You start with Order CheckBook, then repeat the same flow for any other UCM process in the kit.

This guide is your take-home — run it at home, on your own org, at your own pace. It assumes a blank-slate admin and states the expected result at each step so you can verify as you go.

Copy and paste the commands exactly — they are safe to run in order.

Before you start (prerequisites)

Confirm all of the following before you start. If something is missing, your Salesforce account team can help you enable it.

1. An org with **Agentforce Financial Services enabled** (Banking-on-Core / standard object model).
2. **Agentforce Vibes enabled** for your user — an admin has accepted the one-time Terms, and your user has the **View All Data** permission.
3. A **browser login** to that same org for the UI authoring steps (OmniStudio, Service Process Studio, Agentforce Builder).
4. **(Employee Agent only)** the org-level **AgentforceEmployeeAgent entitlement** (part of the *Agentforce for Financial Services* add-on). Without it the agent cannot **Commit** or **Activate**, and no permission set fixes it. You can still build and test the UCM intake without the agent.

Expected result: you can log into the org and see **Agentforce Vibes** in the Setup gear (⚙️) menu.

Dreamforce 2026

Financial Services Cloud Workshop



Part A — Open Agentforce Vibes

1. Log into your Salesforce org in the browser.
2. Click the **Setup gear** (⚙️), search for **Agentforce Vibes**, and open it.
 - **Expected result:** the web Agentforce Vibes IDE opens, already authenticated to your org.
3. Open a terminal inside Vibes (**Terminal** → **New Terminal**, or the terminal panel at the bottom).
 - **Expected result:** you get a command prompt (a **\$** line where you can type).

Part B — Pull the kit into your workspace (copy-paste)

The kit is a folder of field-tested runbooks plus the deployable metadata. These commands pull it **straight into your Vibes workspace** from a public link — nothing downloads to your own computer.

1. Confirm Vibes is connected to the right org:

```
None  
sf org display
```

- **Expected result:** your org's **Username**, **Org Id**, and **Instance URL** print out. Confirm it is the org you intend to build in.

2. Download and unpack the kit:

```
None  
curl -L  
"https://drive.google.com/uc?export=download&id=1AAMI1YeaEB-qyDmi7iMLdRs3lS-MMuG0"  
-o ucm-bsa-vibes-kit.zip  
file ucm-bsa-vibes-kit.zip  
unzip ucm-bsa-vibes-kit.zip
```

Dreamforce 2026

Financial Services Cloud Workshop



```
cd ucm-bsa-vibes-kit
```

- **Expected result:** `file` reports "**Zip archive**" (if it says *HTML*, the link is not public — Contact your Salesforce account team). After `unzip` and `cd`, you are inside the kit folder.

3. Confirm you are at the kit root:

None

```
ls
```

- **Expected result:** you see `VIBES_PROMPT.md`, `docs/`, `force-app/`, `manifest/`, and `sfdx-project.json`.

Part C — Start the build (paste the prompt)

1. Open `VIBES_PROMPT.md` (click it in the file explorer, or run `cat VIBES_PROMPT.md` in the terminal).
2. Copy the **entire** prompt inside the code block.
3. Paste it into the **Agentforce chat** in Vibes and send.
 - **Expected result:** Vibes confirms which org it is connected to, runs a **read-only audit first**, and **stops for your go-ahead** before it changes anything.

Part D — Work through the build

Vibes runs in phases and pauses for your confirmation between each:

- **Phase -1 — Pre-flight:** confirms the org and reads the kit's runbooks.
- **Phase 0 — Audit (read-only):** checks prerequisites and **stops** on any gap before touching the org.

Dreamforce 2026

Financial Services Cloud Workshop



- **Phase 1 — Baseline:** deploys the packaged metadata and guides you through the enablement toggles.
- **Phase 2 — Pick a process:** when asked, choose **Order CheckBook**.
- **Phase 3 — Build the slice:** UCM service process → Employee-Agent topic, verified in the runtime.

This is a hybrid build. Vibes does everything scriptable and verifies it against real records; **you do the UI authoring it cannot script** (OmniStudio clone/activate, the Service Process install, the agent topic). Vibes gives you exact click-paths and the expected result for each.

Green toasts are not proof — the runtime is. Vibes checks each step against real data before moving to the next.

Why Order CheckBook first: it is the lightest end-to-end slice and has a proven Employee-Agent topic (*Checkbook Ordering*), with none of the extra machinery other processes need. Prove the whole stack once, then repeat the same flow for any other process — the kit's docs/Process_Status.md lists every process you can build and which are verified end-to-end. For real core-banking integration, the not-yet-verified processes, or production hardening, work with your Salesforce account team.

Part E — You are done when

1. Launching the **Order CheckBook** intake from the **Action Launcher** on a client record creates a **Case** and starts the process (a passing run shows the process **In Progress** at its staged step).
 2. The **Checkbook Ordering** topic on the Employee Agent launches the same intake **conversationally** and creates the Case.
-

Dreamforce 2026

Financial Services Cloud Workshop



Troubleshooting

Symptom	Cause	Fix
<code>curl</code> produces a file and <code>file</code> says "HTML document"	The download link is not public	Contact your Salesforce account team — the link needs "Anyone with the link" sharing
<code>unzip</code> says "not a zipfile"	The download was an HTML page, not the zip	Re-run the <code>file</code> check; get the current link from your Salesforce account team
Agentforce Vibes is not in the Setup gear menu	Vibes is not enabled for your user/org	Ask an admin or your Salesforce account team to enable Agentforce + Vibes; your user needs View All Data
Agent will not Commit/Activate ("no access to agent templates for <code>AgentforceEmployeeAgent</code> ")	The org lacks the <code>AgentforceEmployeeAgent</code> entitlement	This is a provisioned add-on (Agentforce for Financial Services) — contact your Salesforce account team to add it. You can still build and test the UCM intake without the agent.
<code>sf org display</code> shows the wrong org	Vibes is connected elsewhere	Contact your Salesforce account team; do not run a deploy
The prompt says it can't find the kit files	You are not in the kit folder	Run <code>cd ucm-bsa-vibes-kit</code> and <code>ls</code> to confirm you see <code>docs/</code> and <code>force-app/</code>

Dreamforce 2026

Financial Services Cloud Workshop



Notes

- Everything here is **shipped Salesforce product** on the standard object model — **no managed package, no custom code** to maintain.
- The runbooks in the kit's [docs/](#) folder are the authoritative source Vibes follows; public Salesforce Help (help.salesforce.com, developer.salesforce.com) is its second source. If both leave a gap, Vibes **stops and asks** rather than guessing.
- These are field-tested demo instructions. Verify against official public docs for your release, and tighten the intentionally-broad demo permissions and sharing with your Salesforce team, before using any of this in production.