# Step-by-step Guide Agentforce

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## Introduction to Agentforce

Agentforce is a powerful tool designed to effectively utilize all the data collected and unified within Data Cloud. The fully customizable & autonomous AI agents connect to enterprise data and take actions based on how we train them. By using this powerful tool, we can build Agents that can automate business processes, making it easier for your team to tap into 360 views of customers and to provide sales development representatives & personalized, optimized support agents with Salesforce tools like Apex code, prompt templates, and flows.

Ultimately, the goal of **Agentforce** is to go beyond basic chatbot functionality, and move into more complex, autonomous actions, by engaging in advanced reasoning and decision-making.

In this step-by-step guide, we will use our example company - Sunshine Trails Hospitality, and activate Agentforce to use guest data to clearly understand past stays & reservations. Let's tap into the power of Agentforce to review guest data, make recommendations based on past interests & provide the best experience possible to Sunshine Trails Hospitality guests!

## Technical Benefits of Agentforce

Agentforce is at the forefront of Salesforce's AI technology and offers numerous technical benefits. These include autonomous task execution, thanks to Salesforce's autonomous AI Agents. These agents can operate in dynamic environments, providing an advantage in the execution of complex tasks. Agentforce allows for customization using natural language (NLP) instructions. Additionally, Agentforce has built-in semantic search, vector databases, and RAG (Retrieval Augmented Generation). By pairing or teaming Agentforce with Data Cloud, you can leverage data-driven insights and workflow optimization to improve decision making. Agentforce provides 24/7 availability, operating around the clock across multiple channels, as well as scalability, allowing companies to scale their workforce on demand.

## Key Technical Features:

- **Omnichannel integration**: Agents can handle customer queries from multiple communication channels, such as email, phone, live chat, social media, and messaging apps, in a single workspace.
- **AI agents**: Agentforce agents are autonomous applications that can understand human intent, process complex queries, and take autonomous actions.
- **Data source connection**: Agents can connect to any data source and use it in real time to plan, reason, and evaluate.
- **Data Discovery and Classification**: Agentforce can accurately discover, classify, and label sensitive data**.**
- **Automation of Repetitive Tasks (to expand workflow, automation, and API leverage)**: Automates tasks such as logging activities, scheduling follow-ups, and updating records,

reducing administrative workload for agents, and other solutions; May require manual processes or additional tools to receive similar automation.

**Key Concepts of Agentforce**

- Agentforce can operate autonomously, reducing the need for human engagement to get work done.
- Agentforce can be used to enhance and improve customer experiences.
- Agentforce is low code and easily customizable.
- Users can customize Agentforce to function with use cases, across industries.
- Agentforce optimizes seamless escalations and handoffs to human representatives.

| Key Word | Description |
|---|---|
| Agentforce Service Agent | Customer-facing autonomous AI Agent which supports customer self-service |
| Agent Builder | Native tool used for setup & activation of AI Agents |
| Atlas Reasoning Engine | The brain inside of Agentforce; proprietary system designed to simulate how humans think & plan |
| Einstein Trust Layer | Protects customer data using securing features & guardrails like zero data retention, secure data retrieval, toxicity detection, and dynamic grounding. |
| Audit Trail | Tracks AI Agent actions & outputs; provides data users can track to ensure that AI Agents are in compliance with security & privacy policies |
| AI Audit & Feedback Data | Ensures the accuracy and safety of the responses generated by Agentforce by tracking Einstein trust layer functionality such as toxicity detection & data masking. |

**Engaging Agentforce**

When discussing Agentforce, it's helpful to explore how we can use it in Salesforce Data Cloud. Agentforce leverages the data in the Customer 360 data model, and creates autonomous Agents. These agents perform tasks such as data analysis and order management, freeing up our team to maximize and improve customer experiences. In our Sunshine Trails Hospitality example, the use cases shown below help illuminate some of the ways that Agentforce can be used in Data Cloud for that 360 view of the customer and use advanced reasoning to take actions seamlessly!

| Data Type | Description | Use Case |
|---|---|---|

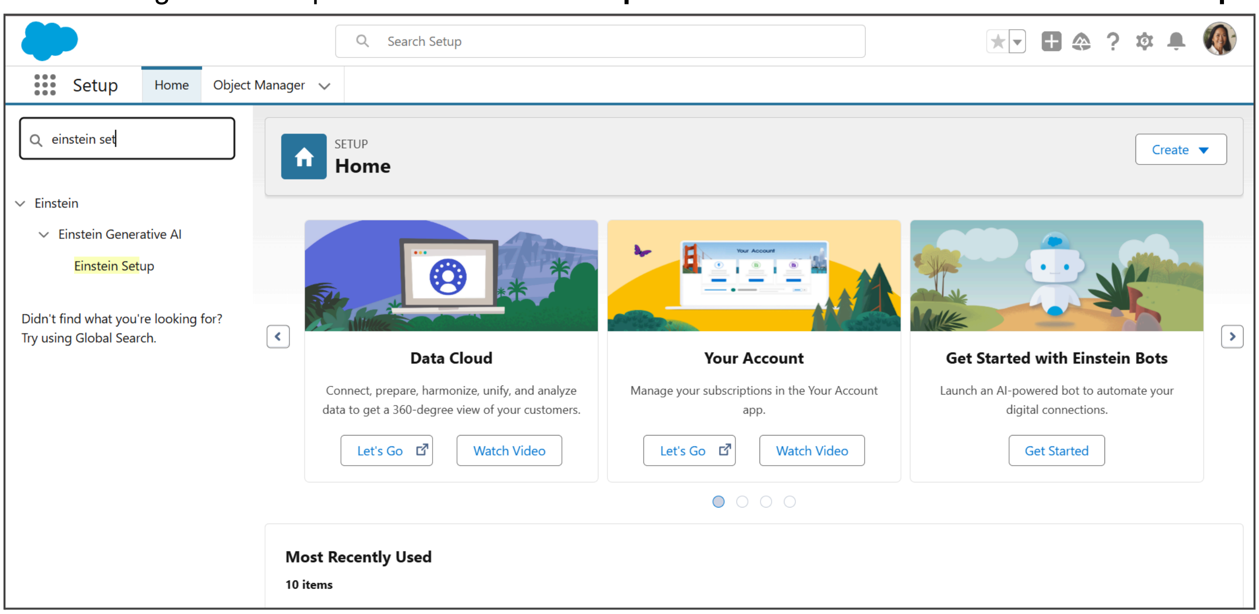
| | | |
|---|---|---|
| Reservation Data | Includes reservation history, room preferences, check-in/check-out times, booking source (OTA, direct, GDS), booking time, and cancellation history. | To understand guest preferences, predict stay behaviors, and provide personalized check-in service. |
| Service Request & Support Data | Service requests, complaint resolutions, chat transcripts, and support call logs. | To enhance guest experience by tracking and resolving issues quickly, and prevent future complaints. |
| Messaging Data | Text messages, email responses, RTP, WhatsApp interactions, and short codes. | To enable communication with guests via their preferred channels and provide personalized messages. |
| Booking Channel Data | Information on the source of booking (direct, OTA, GDS), cancellation history, and booking time. | To understand guest booking behavior and improve marketing strategies for each booking channel. |

**Enable Agentforce**

Let's dive in and put Agentforce to work for Sunshine Trails Hospitality. Before we can set up our first Agent in Agentforce, we need to make sure that Einstein is set up in Salesforce. To do this, follow the steps below.

**Set Up Einstein Generative AI (System Admins)**

1. Navigate to Setup > enter **Einstein Setup** in the Quick Find Box > Click **Einstein Setup**.




2. Click the Turn on Einstein toggle to **On** > Refresh your browser.
3. Enter **Agents** in the Quick Find Box > Click the Einstein Copilot for Salesforce toggle to **On.**

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## Enable Agents (System Admins)

1. Navigate to Setup.
2. In the Quick Find Box, type Agents > click **Agents**.
3. Click the name of the agent > click **Open in Builder** > click **Activate**.

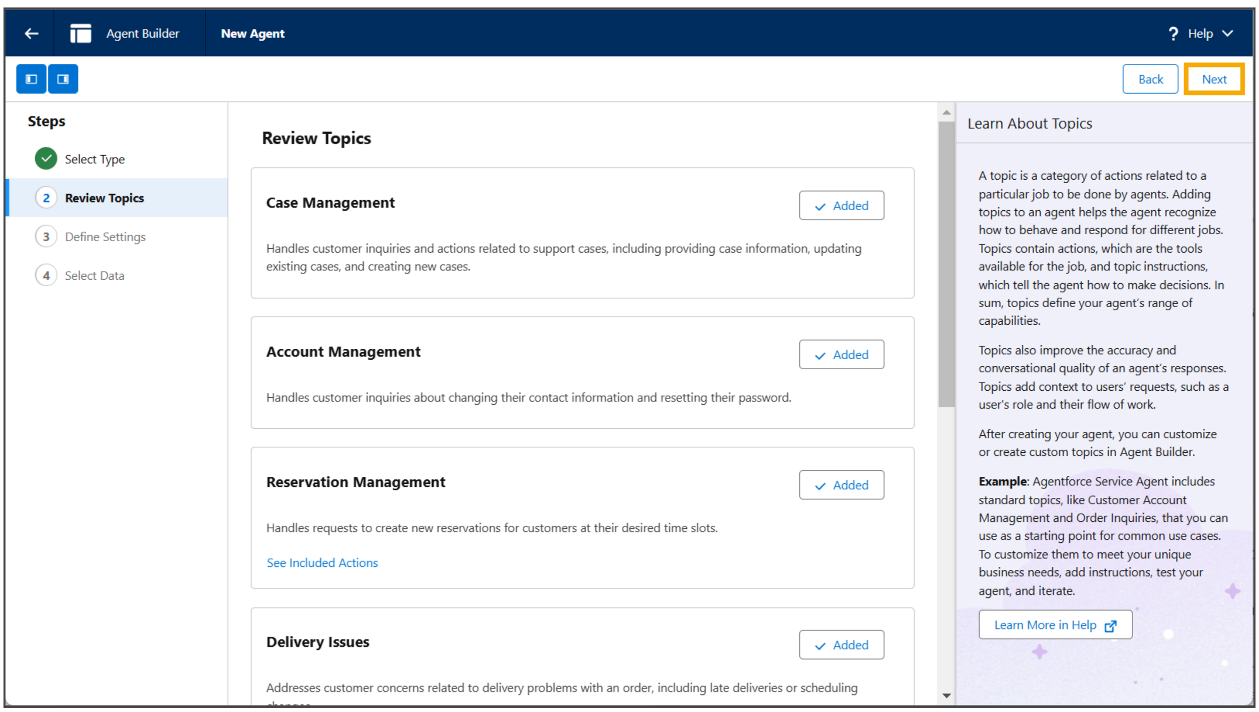
<u>Tip:</u> When creating a new Agent, if the New Agent button does not appear, simply refresh your page until the New Agent button appears.

## Create Your Agent

Now that we've set up & enabled Agents, it’s time for us to build! Follow the steps below to build an Agent using Agentforce.

## Create an Agent

1. Navigate to Setup > enter **Agents** in the Quick Find Box > click **New Agent**.
2. Select your Agent Type (Agentforce Service Agent) > click **Next.**
3. Confirm the topics (these are added by default) > click **Next**.




4. Change the Name & ensure that the API Name updates.

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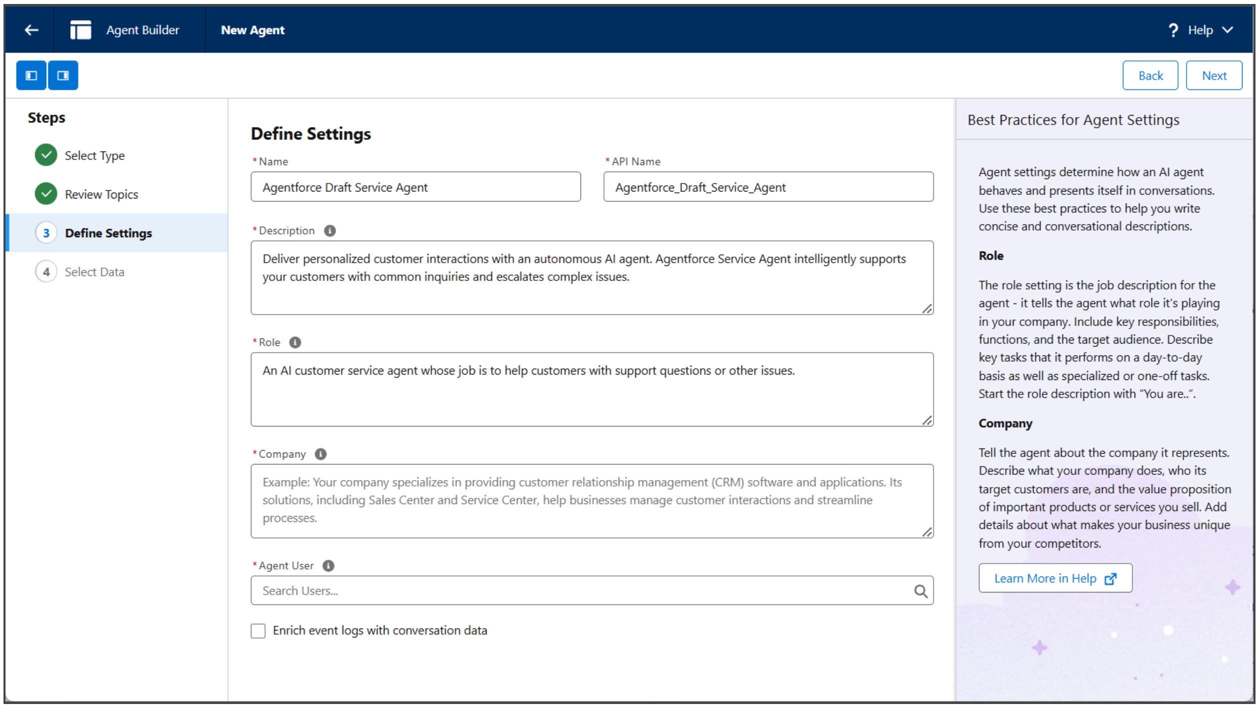


5. Enter the details for Company > Select an Agent User from the list of available users > Click **Next.**
6. Select your Data Library > Click **Create**.
   a. Adding a Data Library will improve your agent's responses. Make sure you are sharing Data from a trusted data source. When creating a new Agent, include data such as specific topics the agent should be able to perform, guidelines for the agent's tone & responses, relevant Salesforce CRM data, and any training data from past interactions.

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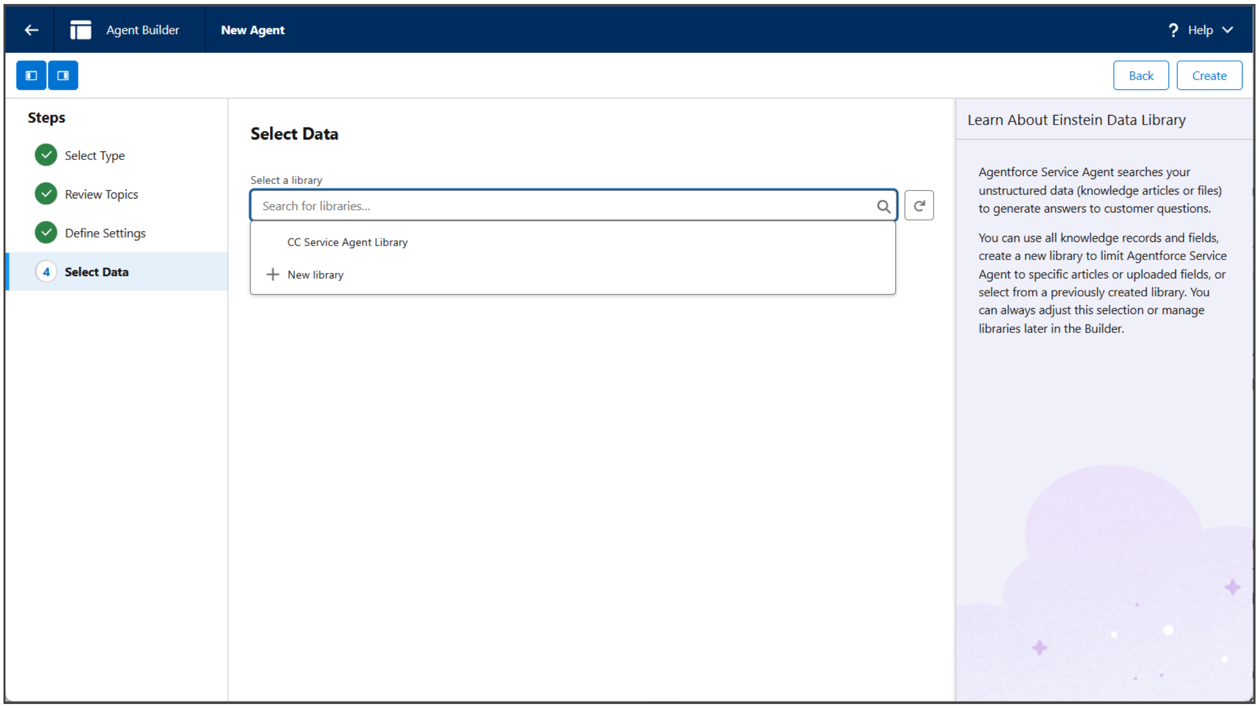


## Add Custom Topics & Actions

We use **Topics** & **Actions** to customize Agent Builder. **Topics** are categories of tasks the AI agent handles, while **Actions** are the queries the AI Agent uses to complete those tasks within the designated topics. Topics & Actions help drive us to our desired outcome, setting the context and providing guard rails for our Agent.

In our Sunshine Trails Hospitality case, an example of a topic with related actions might be:

**Topic:** Reservation Cancellation

**Possible Actions:**

- Retrieve reservation details
- Check cancellation eligibility
- Send a cancellation confirmation email

## Add a Custom Topic

1. Navigate to Setup > enter **Agents** in the Quick Find Box > click the Agent you want to add a Topic to.
2. Click the **Topics** tab > Click **New** > click **New Topic**.
3. Configure the element by updating the Topic Label, Classification Description, Scope, & Instructions > click **Next.**

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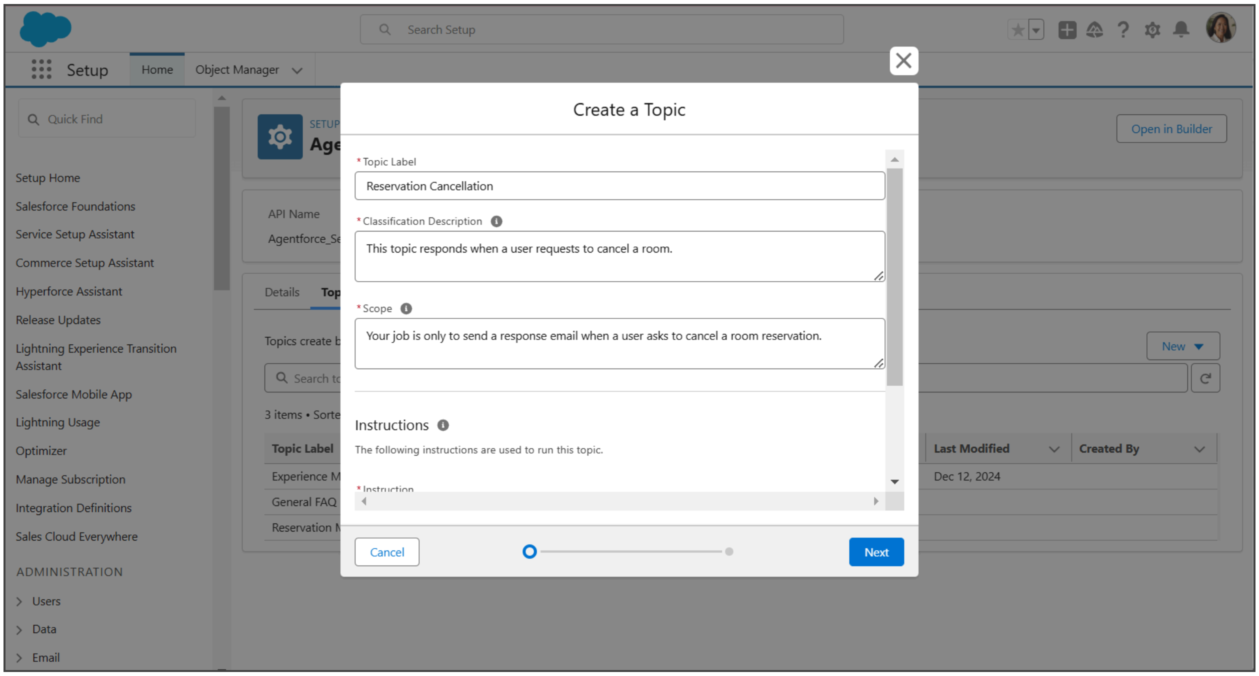
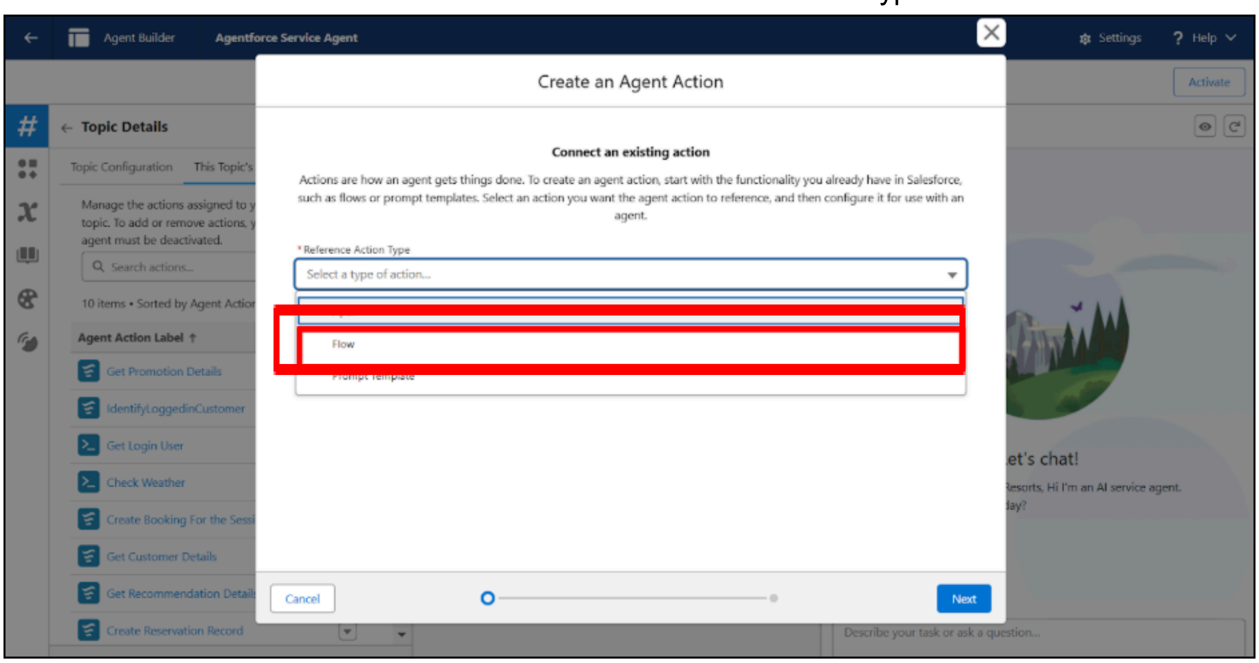


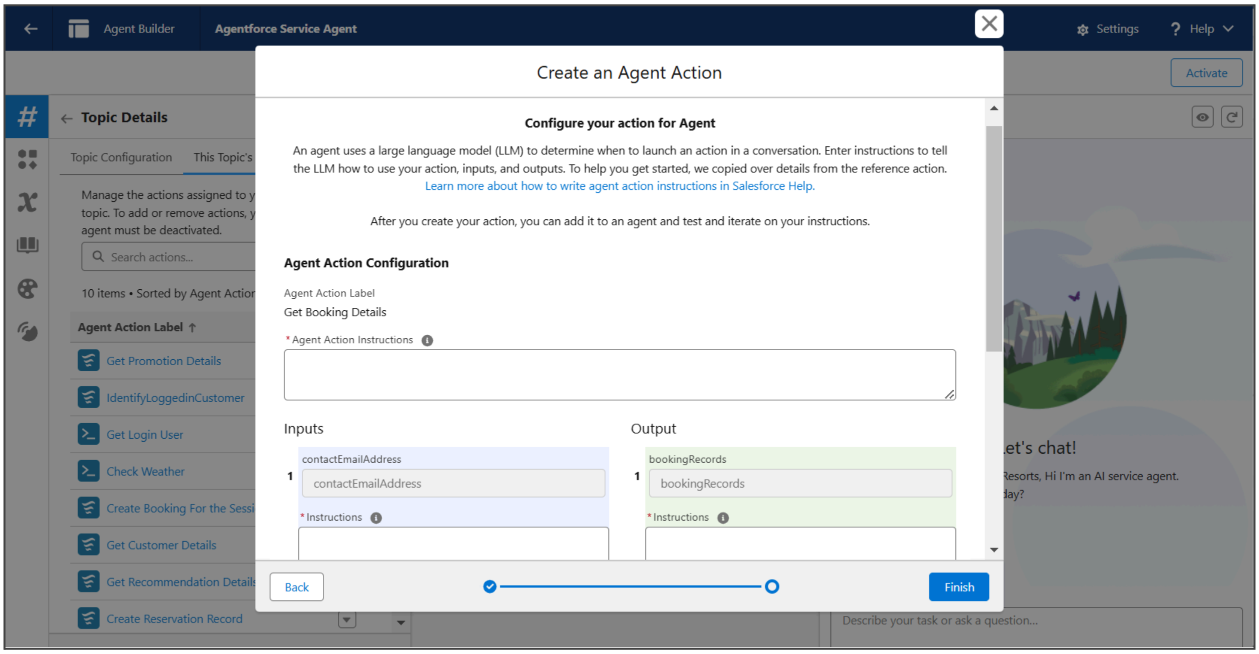

4. Add any desired standard actions > click **Finish**.

**Add Actions to a Topic (Flow)** *only the auto-launch type flow is supported here*

1. Navigate to Setup > enter **Agents** in the Quick Find Box > click the Agent you want to add an action to.
2. Click Open in Builder > click the **Topics** tab > select the Topic > click the **This Topic's Actions** subtab.
3. Click New > select **Add Action** > select **Flow** for the action type.




4. Select the Reference Action > click **Next** > enter an Action Label & confirm the API Name.




5. Configure the Action with Inputs & Instructions > click **Finish**.

### Add Actions to a Topic (Apex)

1. Navigate to Setup > enter **Agents** in the Quick Find Box > click the Agent you want to add an action to.
2. Click **Open in Builder** > click the **Topics** tab > select the Topic > click the **This Topic's Actions** subtab.
3. Click **New** > select **Add Action** > select **Apex** for the action type.
4. Select the Reference Action > click **Next** > enter the Action Label & confirm the API name.

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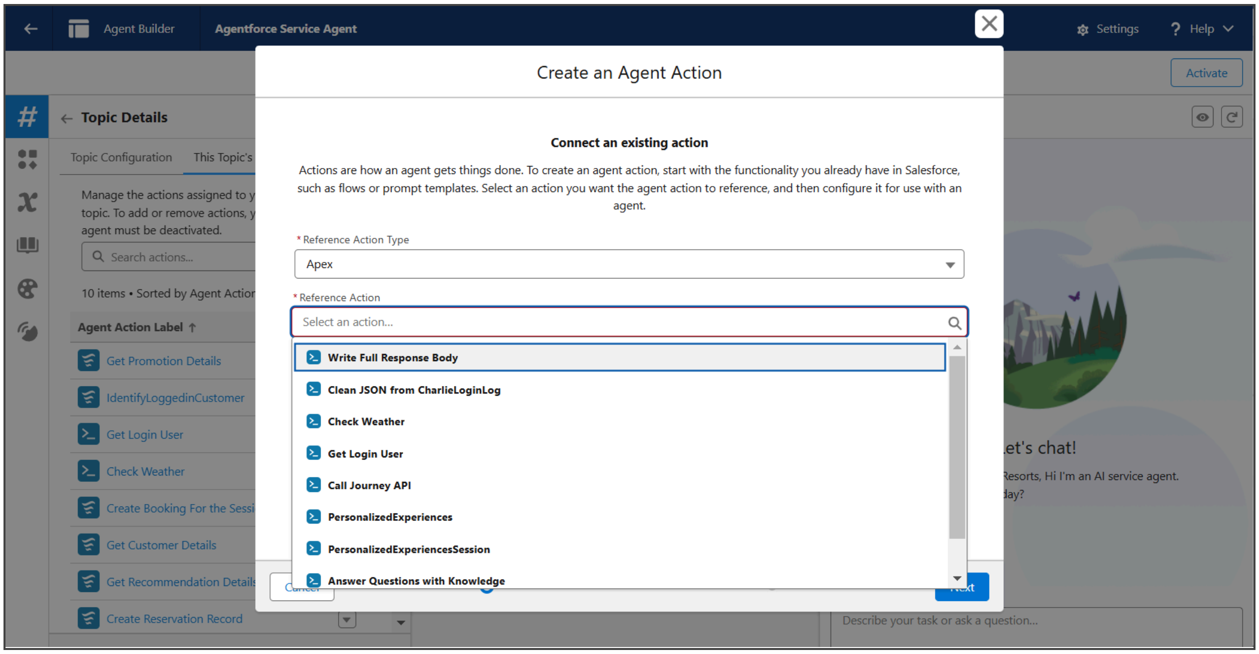
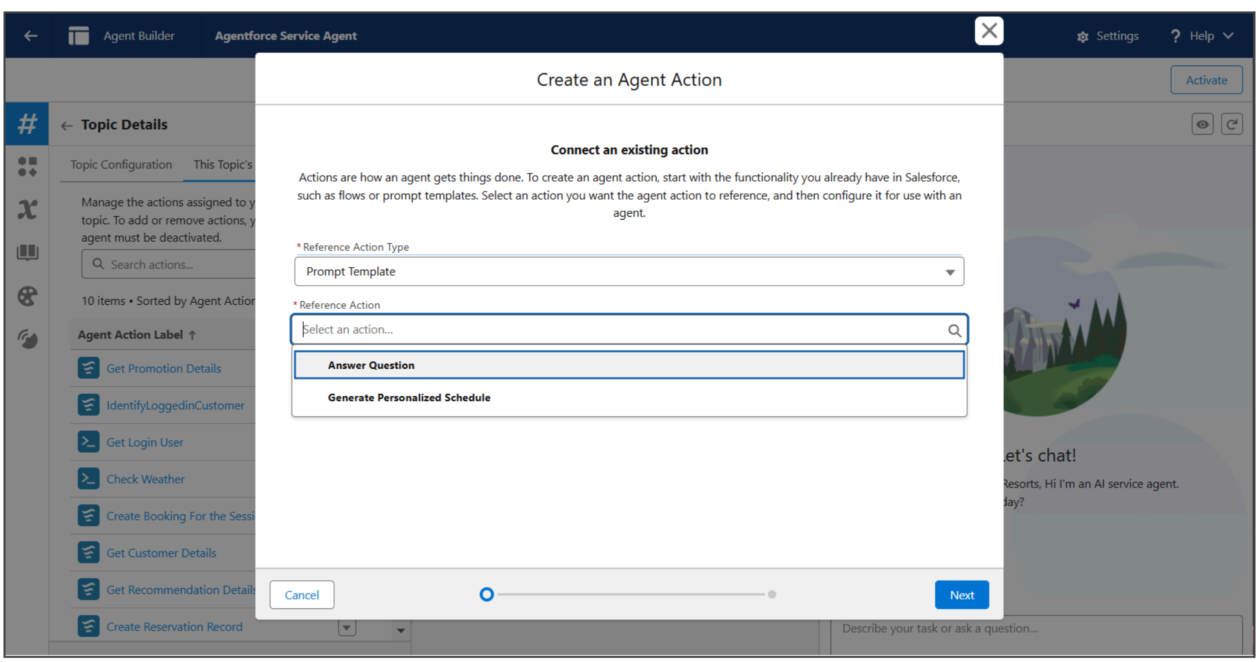



5. Configure the Action with Inputs & Instructions > click Finish.

## Add Actions to a Topic (Prompt Template)

1. Navigate to Setup > enter **Agents** in the Quick Find Box > click the Agent you want to add an action to.
2. Click **Open in Builder** > click the **Topics** tab > select the Topic > click the **This Topic's Actions** subtab.
3. Click **New** > select **Add Action** > select **Prompt Template** for the action type.



4. Select the Reference Action > click **Next** > enter the Action Label & confirm the API name.
5. Configure the action with Instructions, Inputs, & Outputs > click **Finish**.

Now that we have configured our Topics and Actions, let's explore how they work together via **Instructions**. Instructions are the guidelines within each topic that direct how an Agent should handle specific tasks. Instructions provide **context & structure**, guiding our A.I. Agent on how to respond to different types of inputs within Topics.

*For example:*
If a customer inquires about check-in, we might ask the customer to provide their email address, to verify their identity. Our Agent would verify the customer by running an action named "Get Customer Details." Once the customer is verified, the agent would generate a message saying "Hello 'Customer Name,' how can I help you?" If the agent is unable to verify the customer a message such as "I am unable to verify your information, would you like me to redirect you to a live agent?" might be generated.

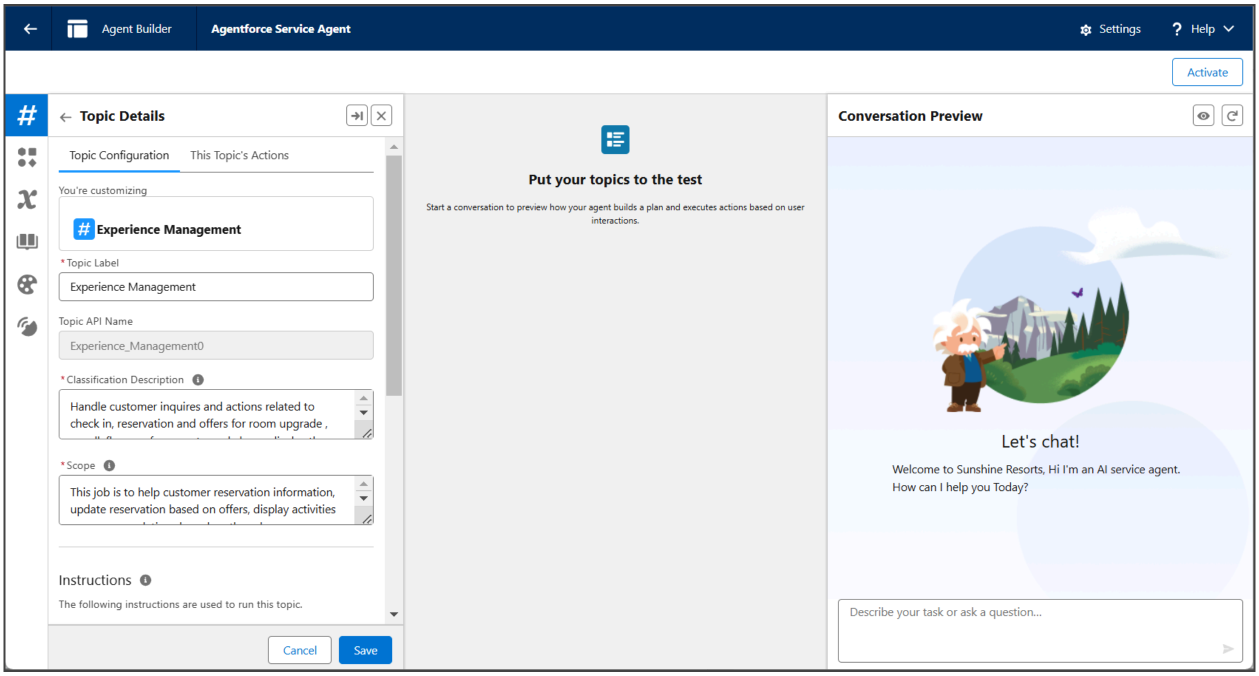
Now that we see how Instructions drive our Agents in Data Cloud, let's configure Instructions.

**Give Instructions to the Agent**

1. Navigate to Setup > enter **Agents** in the Quick Find Box > click the Agent you want to add instructions to.
2. Click **Open in Builder** > click the **Topics** tab > select the Topic > click the **Topic Configuration** subtab.
3. Click **Add Instructions** as many times as needed for your planned instructions > add your desired instructions > click **Save** > click **Activate**.

**Test the Agent**

1. From the Agent Builder, click Refresh in the top right corner of the Conversation Preview pane.




2. Enter your test prompt > press **Return/Enter** > review the Agent's responses.
3. Once you are satisfied with the results of the test, click the **Back Arrow** to return to Setup.

**Publish an Agent to an Experience Cloud Site**

1. Navigate to Setup > enter **All Sites** in the Quick Find Box > Click **Builder** next to your selected site. In our example, this is the *Sunshine Trails Hospitality* site.
2. Click **Publish** > click **Got It** > Click the **Experience Builder Menu**.
3. Click **Salesforce Setup** > Refresh your browser.

**Add Embedded Service Deployments**

1. Navigate to Setup > enter **Embedded Service Deployments** in the Quick Find box.
2. Select the **ESA Web Deployment** > click **Publish** to republish with the latest additions.
    a. Note: The deployment may take up to 10 minutes.

**Enable Messaging For Einstein Service Agent (ESA) Channel**

1. Navigate to setup > enter **Messaging Settings** in the Quick Find box > select **Messaging Settings**.
2. Click the Messaging checkbox.
3. Navigate to the ESA Channel > confirm that ESA is active.

**Re-Route the Flow for the Agent Experience Site**

1. Navigate to setup > enter Flows in the Quick Find box > click Flows.
2. Click on the Route to ESA flow > click the Route to ESA component > select Edit Element.
3. Select the following values in the Set Input Values section:
    a. Route To <> Agentforce Service Agent

    b. Agentforce Service Agent <> CC Service Agent
4. Click Save As New Version > keep everything as is > click Save.
5. Click Activate.

**Add an Agent to your Site**

1. Navigate to Setup > enter **All Sites** in the Quick Find Box > click **All Sites**.
2. Find the site you want to add the Agent to > click **Builder** next to the site name.
3. Click the **Components widget** > search for the component you want to add to your site > drag & drop the component onto the canvas.
4. Confirm the default settings, or update them as desired > click **Publish** > click **Publish** again in the confirmation window > click **Got It.**

## Set up Messaging for In-App and Web (MIAW)

**Enable Omni-Channel**

1. Navigate to Setup > enter Omni Channel in the Quick Find box > click **Omni Channel Settings**.
2. Click the **Enable Omni-Channel** checkbox > click **Save**.

**Create an Omni Flow**

1. Navigate to Setup > enter **Flows** in the Quick Find box > click **Flows**.
2. Click **New Flow** > in the All + Templates tab, select **Omni-Channel Flow**.
3. Navigate to the Manager tab > click **New Resource** > select **Variable** as your resource type.
4. Enter **recordId** as the API name > specify text for the data type.
    a. *Note: The API name is case-sensitive and must be recordId. The messaging channel will use this value to pass information on to the Omni-Channel flow.*
5. Check the box for **Available for Input** > click **Done**.
6. Navigate to the elements tab > add a Route Work action to your flow > name the action.
7. Select **recordId** variable as the input value > select **Messaging** for the Service Channel.
8. Specify the Route To value as Queue, Agent, Bot, or Skills > click **Done.**
    a. If you select Queue, use the Queue ID for the queue where you want the work directed
    b. If you select Agent, add the agent's name via the Agent ID field.
    c. If you select Bot, search for the bot name.
    d. If you select Skills, add the Skill Requirement list.
9. Save & Activate the flow.

**Add a Messaging Channel**

1. Navigate to setup > enter **Messaging Settings** in the Quick Find box > click **Messaging Settings**.
2. Click **New Channel** > select **Messaging for In-App and Web** > complete the channel name > click **Save**.

3. Select Routing type **Omni Flow** > select the Omni-Channel flow & Queue you want to use > click **Save** > activate the channel.

**Add Messaging to an App (Web)**

1. Navigate to setup > enter App Manager in the Quick Find box > select App Manager.
2. Find the app you want to add messaging to > add the Omni-channel sidebar or utility to the app.
    a. Add the Omni-channel sidebar
        i. Navigate to Setup > enter **App Manager** in the Quick Find box > click **App Manager**.
        ii. Scroll to the selected app > click the dropdown arrow > click **Edit**.
        iii. The Lightning App Builder opens > in the App Options tab, select **Use Omni-channel sidebar** > click **Save**.
    b. Add the Omni-channel utility
        i. Navigate to Setup > enter **App Manager** in the Quick Find box > click **App Manager**.
        ii. Scroll to the selected app > click the dropdown arrow > click **Edit**.
        iii. The Lightning App Builder opens > click **Utility Items** (Desktop Only) under the App Settings > click **Add Utility Item**.
        iv. Search for Omni Channel > click **Omni Channel** > click **Save.**
3. In the Navigation items section, move **Messaging Sessions** to the Selected Items list > click **Save**.
4. In the User Profiles section, verify that the user profiles which need access to Messaging are shown in the Selected Profiles list.
5. Edit the Messaging Session page layout
    a. Navigate to Setup > click the **Object Manager** > click **messaging Session** > click **Lightning record pages**.
    b. Click the **page name** > click **Edit** > alternatively, clone the existing default page.
    c. Lightning App Builder opens > drag your desired components onto the page.
    d. Confirm your new page layout > click **Save**.

Tip: the following page components are most relevant to Messaging: Enhanced Conversation, Conversation, Related Record, Flow, Actions & Recommendations, Next Best Action, Knowledge, and After Conversation.

**Set up Messaging in the Salesforce Mobile App**

1. Enable Enhanced Omni
    a. Navigate to setup > enter Omni-Channel Settings in the Quick Find box > select Omni-Channel Settings.
    b. Enable Omni Channel & its features > click Save.
2. Set up your Messaging Channel
    a. Navigate to setup > enter Embedded Service Deployments in the Quick Find box > select Embedded Service Deployments.

b. Click the New Deployment button > click Messaging for In-App and Web > click Mobile as the destination for your channel.
c. Name your Embedded Service deployment; the API will auto-populate > Select your Messaging Channel & add it to the deployment > click Save.
d. Adjust your deployment from the deployment settings page > click the Mobile Configuration section of the deployment settings > click Get Code File to download the JSON configuration file.
e. Click Publish.

3. Optimize the Agent Console for the Salesforce Mobile App
   a. From the desktop, open the agent console > click the Setup icon > click Edit Page.
   b. Click the Pages dropdown > select + New Page > click Record Page > click Next.
   c. Give the layout a label > select Messaging Session as the Object > select a page template > click Done.
   d. In the layout field, click Phone > add your lightning components, including the Enhanced Conversation component > click Save.
   e. Click Activation > click Assign as Org Default > select Phone in the Assign Form Factor window > click Next > click Save.
4. Prepare Users to Message in the Salesforce Mobile App
   a. Assign the Messaging User permission set license to your agents.
   b. Assign the Message on Mobile permission to your agents.

**Connect Your Agent to Customer Channels**

1. Navigate to Setup > enter **All Sites** in the Quick Find Box.
2. Find the site you want to add the Agent to > click **edit** next to the site name.
3. Click the **Components widget** > search for the component you want to add to your site > drag & drop the component onto the canvas.
4. Confirm the default settings, or update them as desired > click **Publish** > click **Publish** again in the confirmation window > click **Got It.**

## Agent Action Security

As you configure your Agents, it is important to keep security risks in mind, and to mitigate those risks as much as possible. Agentforce Agents are powerful features, and it is necessary to take steps to configure Agents in a way that protects sensitive data. Let’s explore how we can configure Agentforce Agents with authentication and authorization in mind. Remember that Agents should have access to only the minimum user permissions required to complete their job, and that agents which are capable of taking private actions should have authentication access control built directly into the flow of the action.

**Agent Classification**

| | |
|---|---|
| Public Action | Public actions can be taken on behalf of anyone, regardless of identity. They require no authentication. These actions are grounded in public information. |
| Private Action | Private actions can be taken on behalf of specific users. They are restricted to those users only. The user who triggers the action must be authorized to access the action in order for an Agentforce Agent to complete a private action. The user's identity must also be securely confirmed. |

**Guidelines for the Secure Implementations of Private Actions**

- Ensure that the agents confirm the identity of the user they're interacting with before taking a private action on the user's behalf.
- Confirm user identity using techniques such as two-factor authentication
- Save the confirmed user identity in the MessagingSession record.

**Key Guidelines**

1. **Principle of Least Privilege:**
   a. **Restrict Access:** Grant only the minimum necessary permissions to your Agentforce Service agent.
   b. **Review Permissions Regularly**: To ensure that permissions are still appropriate, conduct periodic reviews.
2. **Robust Access Controls:**
   a. **Enforce Strong Authentication:** Implement strong authentication mechanisms, such as two-factor authentication, to verify the identity of users interacting with your Agentforce Service agent.
   b. **Monitor Access Logs:** To identify any suspicious activity, regularly review the access logs.
3. **Secure Action Design:**
   a. **Limit Scope:** Design actions to operate within specific boundaries and prevent unauthorized access to sensitive data. Build confirmation of user identity and permissions directly into each private action.
   b. **Validate Input:** To prevent malicious input and potential security vulnerabilities, implement input validation.
   c. **Error Handling:** To prevent information disclosure and system instability, implement robust error handling.

**Authenticating Experience Site Users**

1. When deploying an Agentforce Service Agent to a custom site or app with its non-Salesforce authentication mechanism, map your Agentforce Messaging Session to a MessagingSession record.

2. Employ the User Verification feature to allow the custom site or app to securely pass a user identifier.
3. The user identifier is saved to the MessagingEndUser record.
4. The MessagingEndUser record serves as a confirmation of the user's identity.

Tip: This method does not automatically track an authenticated AuthSession. There is no way to immediately invalidate authentication after granting it. Expiration dates should be defined with the knowledge that authentication is valid until the date embedded in the token is reached.

**Best Practices**

| |
|---|
| • When creating Topics, group topics together based on their purpose. |
| • When defining Actions, include things like generating text, sending emails, and searching knowledge bases. |
| • When building an Agent, take advantage of the Guided Setup. This process walks you through creating an agent, associating topics, adding actions, etc. |
| • Use custom Topics & Actions to interact with your data. |
| • Routinely test your agents once they are built to ensure that you are creating the desired output. |

**Conclusion**
Agentforce is a powerful tool that works 24/7 to support you & your customers. By tapping into the power of Agentforce, you can automate flows and make the customer experience seamless. Explore the ways that Agentforce can work for you!

**Resources**
Salesforce News: Salesforce's Agentforce is Here
Salesforce: Agentforce and RAG Best Practices for Better Agents
Salesforce Help: Set Up Einstein Generative AI
Salesforce Help: Prepare a Salesforce Org for Messaging for In-App and Web
Salesforce Help: Set Up Messaging in the Salesforce Mobile App
Salesforce Help: Configure a Messaging for In-App Deployment
Salesforce Help: Create Service Channels
Trailhead: Enable and Customize the Agentforce Default Agent
Trailhead: Configure an Agentforce Service Agent