

salesforce

# Getting started with Agentforce Marketing

For Marketing Cloud  
Engagement users

Agentforce

Can you help me build a  
personalized campaign?

Sure! I'd recommend targeting your  
Loyal Shopper segment. I'll build an  
email for this this promotion with  
personalized product recs.

I can also build an offer to be sent out  
via SMS so we can start a two-way  
conversation.



Flow Builder

Loyalty Promotion Offer



Segment-Triggered Flow  
Start



Recommended Products Email  
Send Email



Wait 4 Days  
Wait for Amount of Time



Special Offer Text  
Send SMS



Wait Until SMS Response  
Wait Until Event

for...

Event Occurs



Send to Agent  
Forward Conversation

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## Introduction

# What is next-gen Marketing Cloud?

**Next-gen Marketing Cloud is the complete agentic marketing solution, natively built on Salesforce's core platform.** It's designed to help you personalize the right moments across the customer lifecycle through two-way conversations powered by actionable data, cross-departmental workflows, and autonomous AI agents.

We've taken what Marketing Cloud does today and made it better – simpler to use, modern UX, and fully unified – with autonomous AI agents built in from the start.

Next-gen Marketing Cloud works with and augments your existing Marketing Cloud products and processes through interoperability. This means you benefit from more actionable data, better cross-departmental workflows, and Agentforce embedded everywhere.

This is not a rip and replace. It's a continuation of Marketing Cloud that makes it easier for you to take the next step into the future of agentic marketing.

In this guide, we'll walk through how to begin your journey into the future of marketing with next-gen Marketing Cloud.



# What can you do with next-gen Marketing Cloud?

Next-Gen Marketing Cloud offers Marketing Cloud Engagement users exciting functionality they can take advantage of right away. This list will grow with each release cycle, so you can use the new functionality at your own pace.

## **Create Dynamic Customer Experiences Powered by Agentforce**

**(GA Winter '26):** Boost your productivity with new Agentforce features for journeys. In Agent Builder, set up the Journey Decisioning agent for specific tasks or use cases, which relate to existing journeys in Journey Builder. The agent creates tailored message content and determines which journeys are most relevant for each individual. The content and journey selections are saved in data extensions that marketers can use in Journey Builder.

## **Create Cohesive Customer Experiences with Flow (GA Winter '26):**

Now, Marketing Cloud Engagement customers can access Flow Builder. Use a flow to automate internal processes and external touchpoints. Create cohesive, end-to-end customer experiences that combine data from Sales Cloud, Service Cloud, Marketing Cloud, Commerce Cloud, Data Cloud, Agentforce, and your external systems.

## **Centralize your Campaign Operations and Analytics (GA Winter '26):**

Next-gen Marketing Cloud for Engagement unlocks the power of the Salesforce Campaigns object.

Next-gen Marketing Cloud for Engagement unlocks the power of the Salesforce Campaigns object. Use a campaign as a working space to organize your flows, assets, and notes. Campaigns can also include objects from across the Salesforce Platform, such as loyalty promotions, ad activations, and service cases. By using campaigns, marketers can spend less time managing logistics and focus more on creating engaging customer experiences.

## **Consolidate and Enrich Your Marketing Data (GA Winter '26):**

unified reporting tools in next-gen Marketing Cloud for Engagement provide a single source of truth for all of your marketing data. You can build reports using data from Engagement as well as data from other Salesforce products such as Sales Cloud, Service Cloud, Loyalty Management, Data Cloud, and Tableau Next. These powerful tools help spot-check campaign performance and troubleshoot problems. Out-of-the-box dashboards and customizable reports help you do more with your email, SMS, WhatsApp, and mobile app messaging data.

## **Access Detailed Message Usage Reports in Digital Wallet (GA Winter '26):**

Next-gen Marketing Cloud for Engagement includes Digital Wallet, which gives you insight into message usage by day, channel, and Marketing Cloud Engagement (MCE) business unit. For simplified billing, all messages that you send consume Salesforce Message Credits.

# Define your strategy

The evolution to agentic marketing with the next-gen Marketing Cloud solution is not a migration but a powerful opportunity to rethink how your marketing team operates, connects with customers, and drives business outcomes. Instead of merely replicating existing playbooks, take this moment as an opportunity to reassess your data, processes, and campaigns. Think about the future of your customer experience and how to strategically leverage your technology stack to get there.

Next-gen Marketing Cloud is a complete agentic marketing solution, natively built on Salesforce's core platform. It is designed to help you personalize the right moments across the customer lifecycle, powered by actionable data, cross-departmental workflows, and autonomous AI agents. Next-gen Marketing Cloud works with your existing Salesforce products and processes, meaning you benefit from more actionable data, better cross-departmental workflows, and Agentforce embedded everywhere. **This approach empowers marketers to grow customer relationships with agentic marketing by:**

- Actioning data with an agentic layer: Using built-in agentic AI to drive marketing strategy, content creation, and campaign optimization using real-time context.

- Harmonizing disparate data: Making informed decisions, optimizing resource allocations, and personalizing customer experiences by unifying all marketing data for deeper insights.
- Orchestrating unified workflows: Engaging across the entire lifecycle by connecting marketing to every department, ensuring seamless, end-to-end customer experiences.

Take this moment to think about what you want your customer experience to look like in the future and how your technology stack will get you there. Next-gen Marketing Cloud is about adding what's next to what's already working. These questions will help you define your strategic direction.

## Customer Experience and Personalization

- What specific parts of your customer journey currently need improvement or deeper personalization?
- How can you leverage Agentforce for AI-driven journey decisioning to personalize experiences at scale, ensuring consistency across touchpoints and optimizing the entire customer lifecycle?



## 02

# Define your strategy.

- Where can Flow be used for cross-journey orchestration to create more cohesive, end-to-end customer experiences by dynamically routing individuals between multiple MCE journeys based on real-time events, segments, or data-driven decisions?
- How can you use real-time personalization and AI-powered recommendations to boost conversions across every customer touchpoint?
- What opportunities exist to connect marketing and service for a consistent brand experience and contextual handoffs, improving customer retention?
- How can you leverage unified customer profiles and real-time audience segments to increase customer lifetime value (CLTV)?
- Which new channels like SMS and WhatsApp can be adopted through next-gen Marketing Cloud for richer, two-way conversational engagement with customers?

## Automation and Efficiency

- What manual tasks are your teams performing today that could be automated by Agentforce or Flow to increase business efficiency and scale?
- How can the Campaign workspace and unified reporting streamline campaign planning, organization, and collaboration, replacing disconnected tools?

- How can AI agents assist with campaign assembly, performance optimization, and 1-to-1 personalization at scale to free up marketers for strategy and creativity?

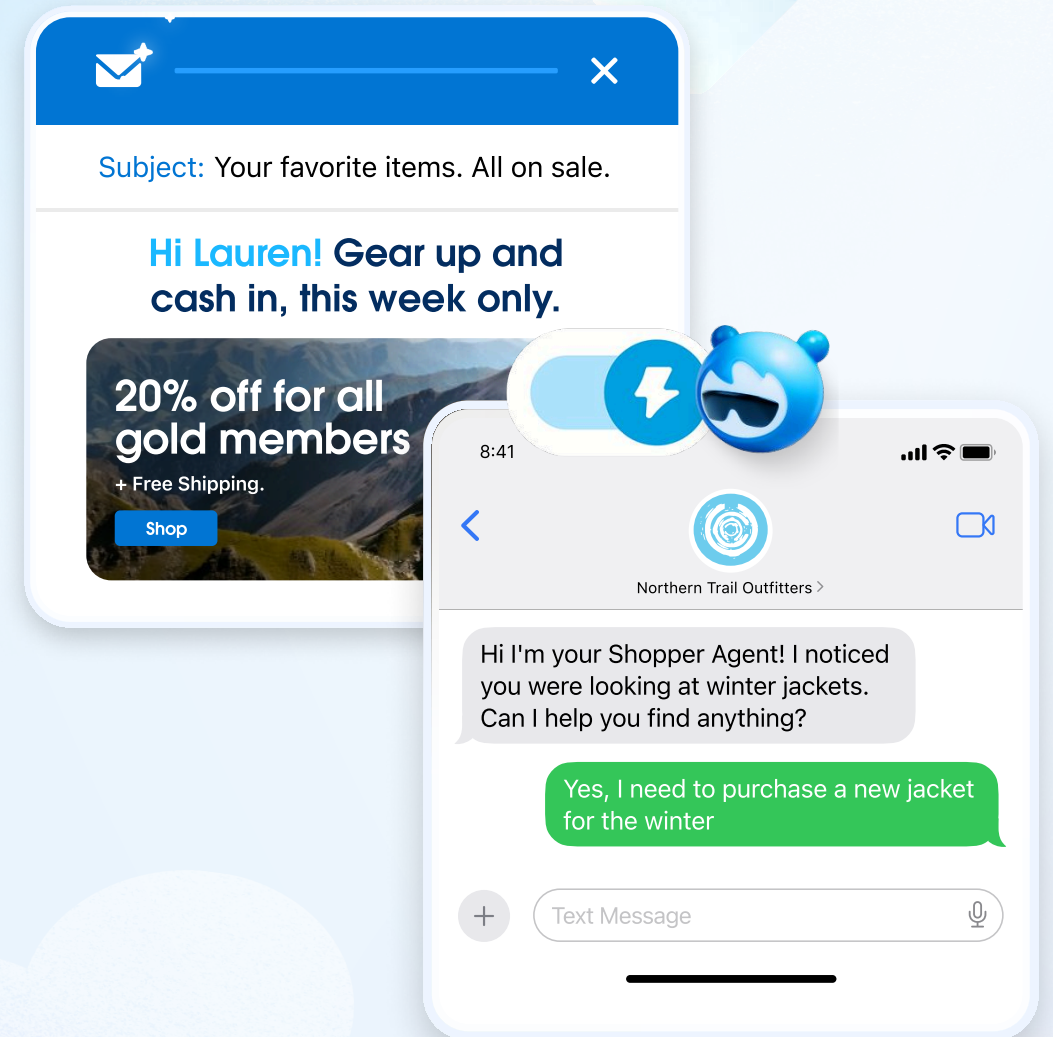
## Data Utilization and Insights

- Are you capturing all the data you need to understand and listen to your customers?
- How can Data Cloud harmonize disparate data for more actionable insights?
- What KPIs are most critical to your business, and how can unified reporting and campaign dashboards provide clearer visibility into deliverability and performance data across emails and journeys?
- How can Digital Wallet help you track message credit consumption, forecast budgets, and prevent unexpected overage fees with self-serve dashboards and alerts?
- How can AI campaign insights, optimizations, and attribution improve your marketing ROI?
- How will unified reporting across MCE and next-gen Marketing Cloud datasets provide deeper cross-channel insights into campaign performance?

# Usage guidance

## Email

For Marketing Cloud Engagement customers with next-gen Marketing Cloud, your existing investments and processes for email campaigns remain central to your strategy. You will **continue to build and send your emails** within your familiar MCE apps, such as Journey Builder and Email Studio. This means you can keep leveraging your existing content, established email journeys, and sender reputation. However, next-gen Marketing Cloud enhances these capabilities by allowing you to orchestrate your MCE emails and journeys using Flow Builder within next-gen Marketing Cloud. This enables you to dynamically trigger existing MCE emails from Flow, route individuals across multiple MCE journeys, and use advanced functionalities like AI-driven decisioning based on a unified customer dataset. While hybrid sending with shared sender domains or IP addresses between MCE and next-gen Marketing Cloud is not yet fully supported, future enhancements are planned to streamline this experience.





# Usage guidance

## Journey Orchestration

**Journey Builder** will continue to be your foundational tool for orchestrating robust, multistep, cross-channel customer campaigns. If you're performing tasks like updating content within an existing journey, making changes to your audience, or creating new journeys that follow similar strategies and use cases as your current ones, Journey Builder remains the ideal choice. It's perfectly suited for managing your established, large-scale marketing automations, especially for email sends, where you leverage existing content and your familiar Journey Builder tools.

**Flow Builder** introduces a powerful new dimension, designed to supercharge your marketing by tackling complex business processes that extend beyond traditional marketing campaigns and across your entire Salesforce ecosystem. You should consider Flow Builder when you need cross-journey orchestration, dynamically routing individuals between multiple MCE journeys based on real-time events, segments, or data-driven decisions. This also includes leveraging Agentforce for AI-driven journey decisioning, where the system autonomously determines the "next best journey" for each individual and dynamically tailors content at scale based on behavior and business goals. Flow is also the go-to for cross-Salesforce orchestration, extending marketing use cases into Sales Cloud, Service Cloud, Commerce Cloud, and external systems –

creating seamless handoffs between departments. Furthermore, Flow enables two-way conversational engagement via SMS and WhatsApp, providing interactive dialogue with customers and efficient handoffs to Service Cloud when needed

In essence, use Journey Builder for what it does best: orchestrating multistep, multichannel customer journeys within Marketing Cloud. Flow Builder is your tool for more advanced, intelligent automation and cross-departmental workflows that may have been previously difficult or impossible to automate, connecting your marketing efforts with broader business processes and real-time data from Data Cloud. This synergistic approach allows you to keep your existing investments while adding powerful next-generation capabilities to elevate your customer experiences.

# Usage guidance

## SMS

As valued customers, understanding the best way to utilize SMS within your Marketing Cloud ecosystem, blending your existing MCE with the exciting new capabilities of next-gen Marketing Cloud through Marketing Cloud Engagement+, is essential for optimizing your customer interactions. Remember, Marketing Cloud Engagement+ is designed as an adoption-led strategy, not a migration, which means your current MCE functionalities are fully supported and will continue to serve you well. Our goal is to enhance your existing investment, not replace it.

You should continue to rely on **MCE for your existing SMS campaigns and sender codes**. If you have active journeys that are already sending one-way promotional or transactional SMS messages, and your business needs involve updating content or making audience changes within these established MCE channels, Journey Builder remains the appropriate tool. Since hybrid sending on a common sender code across both MCE and next-gen Marketing Cloud is not yet supported, maintaining your current SMS operations within MCE ensures seamless continuity for these established efforts.

For **Marketing Cloud Engagement customers who are new to SMS**, it's highly recommended to set up your new shortcode

directly in next-gen Marketing Cloud, using Flow and Agentforce. This allows you to immediately leverage powerful two-way conversational engagement and AI-powered automation features, which are specifically designed for net-new SMS adoption and aren't available in traditional MCE. This allows you to engage in real-time, interactive dialogues with your customers; offer automated responses; provide product information; and even facilitate seamless handoffs to your service team, all within a single SMS number. These conversational features, along with advanced orchestration and AI-driven decisioning, represent a significant evolution beyond traditional one-way messaging.

Looking ahead, we're actively working on bridges such as consent synchronization and the sharing of sender codes. These future developments on the roadmap will enable hybrid sending on both existing and new codes, allowing a common code and consent to be shared across your traditional MCE apps and Flow in next-gen Marketing Cloud. This will further streamline your SMS operations and provide even greater flexibility in how you manage your customer communications.

## 04

# How to get started with next-gen Marketing Cloud

Here's how to get started connecting your Marketing Cloud Engagement instance to next-gen Marketing Cloud.

## Phase 1: Get access and prepare your data.

### Before you start:

- a. You'll need your existing Marketing Cloud Engagement (MCE) license.
- b. A Data Cloud tenant is necessary, with limited setup as Data Cloud acts as the connective fabric for these new features. This can be an existing Data Cloud instance or a new one, and including Salesforce Foundations is recommended to provide baseline Data Cloud access.
- c. Admin users for both your MCE account and your Salesforce Platform (next-gen Marketing Cloud) are needed for setup. Identity licenses are sufficient for next-gen Marketing Cloud users.

### Renew onto the Marketing Cloud Engagement+ (MCE+) SKU

- a. To unlock access to next-gen Marketing Cloud features, existing MCE customers will renew their current MCE edition onto the corresponding MCE+ SKU.

### Ensure Message Credits are in place

- a. With MCE+, all messaging consumption will be managed through Salesforce Message Credits (for Email, SMS, WhatsApp, Mobile App) instead of the older "Super Messages." Salesforce Message Credits is a shared entitlement that is fungible across sends in both MCE and the next-gen Marketing Cloud platform.
- b. These credits are included with your MCE+ edition, but additional message volume can be purchased as add-ons.

## 04

# How to get started with next-gen Marketing Cloud

## Phase 2: Enable features and start configuring details.

### Before you start:

- a. This is a fundamental step, as Data Cloud is the connective fabric linking your existing MCE data with next-generation features.
- b. If you're a new Data Cloud customer, this involves activating Data Cloud in the Salesforce Platform environment, which may include installing Data Cloud and deploying data streams (out of the box [OOTB] or prepackaged) for channel bundles.
- c. For existing Data Cloud customers who have already integrated MCE data, some initial connection steps may be skipped.

### Configure your next-gen Marketing Cloud (MC) organization

- a. You'll need to map your MCE business units to Data Spaces within Data Cloud. This establishes the organizational structure for your new capabilities. Starting with a single Data Space is recommended.
- b. Turn on the OOTB data bundles for Engagement data. This ensures that essential MCE data (like email, SMS, WhatsApp, and push engagement, along with Journey Builder history) is available for segmentation and decisioning in next-gen MC without manual data modeling.
- c. (Optional step) Import your Data Extensions from MCE to Data Cloud, allowing you to reuse the existing custom data.

## Connecting Marketing Cloud Engagement to Data Cloud?

Here's how.

Watch demo





## 04

# How to get started with next-gen Marketing Cloud

## Set up users and permissions for next-gen MC

- Administrators will need to create new users (with Identity licenses) in next-gen MC and assign them appropriate Marketing Cloud permission sets, such as “Marketing Cloud Admin” or “Marketing Cloud Manager.”
- Initially, users will log in to MCE and the new marketing app separately, but navigational links will be available between the two environments.

## Complete the Marketing Setup Assistant

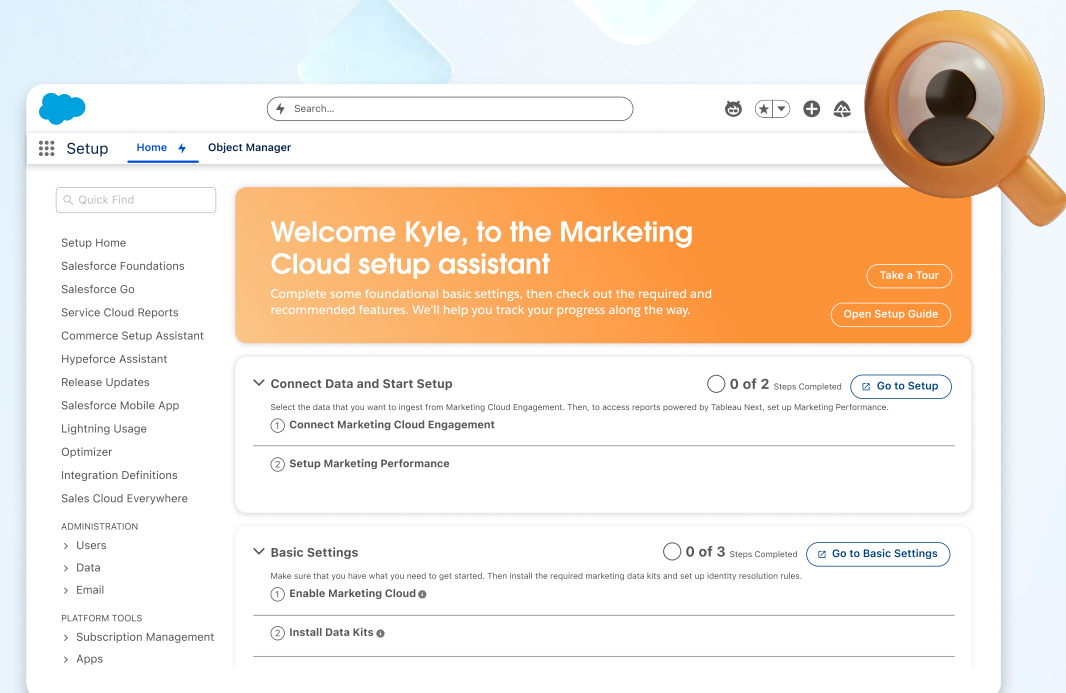
- Follow the guided steps in the Marketing Setup Assistant within next-gen MC to finalize basic settings and turn on the OOTB Analytics dashboards.

## Configure Identity Resolution and Data Graph (if applicable)

- For advanced Flow functionality, Identity Resolution and Data Graph are generally prerequisites.
- If you aren’t an existing Data Cloud customer, create an Identity Resolution Ruleset.

## Install Marketing Performance features

- Within next-gen MC Setup, go to “Marketing Performance” and click “Install” to deploy these features, which run in the background.





# How to get started with next-gen Marketing Cloud

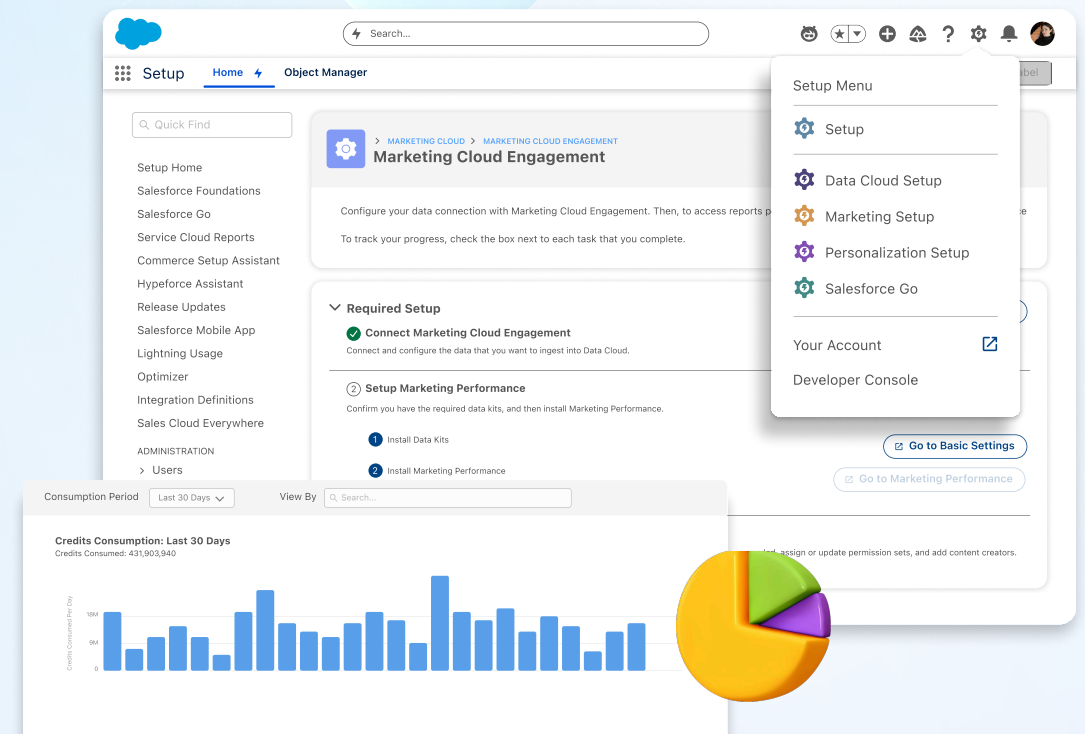
## Phase 3: Begin leveraging next-gen Marketing Cloud capabilities.

Once the initial setup is complete, you can begin to explore and implement the new capabilities incrementally.

### Track message consumption with Digital Wallet

This self-serve dashboard allows you to analyze message credit usage across Email, SMS, and WhatsApp by business unit, helping you forecast budgets and set alerts to prevent overages.

- Find and open the Your Account app.
- Click the Consumption Cards tab.

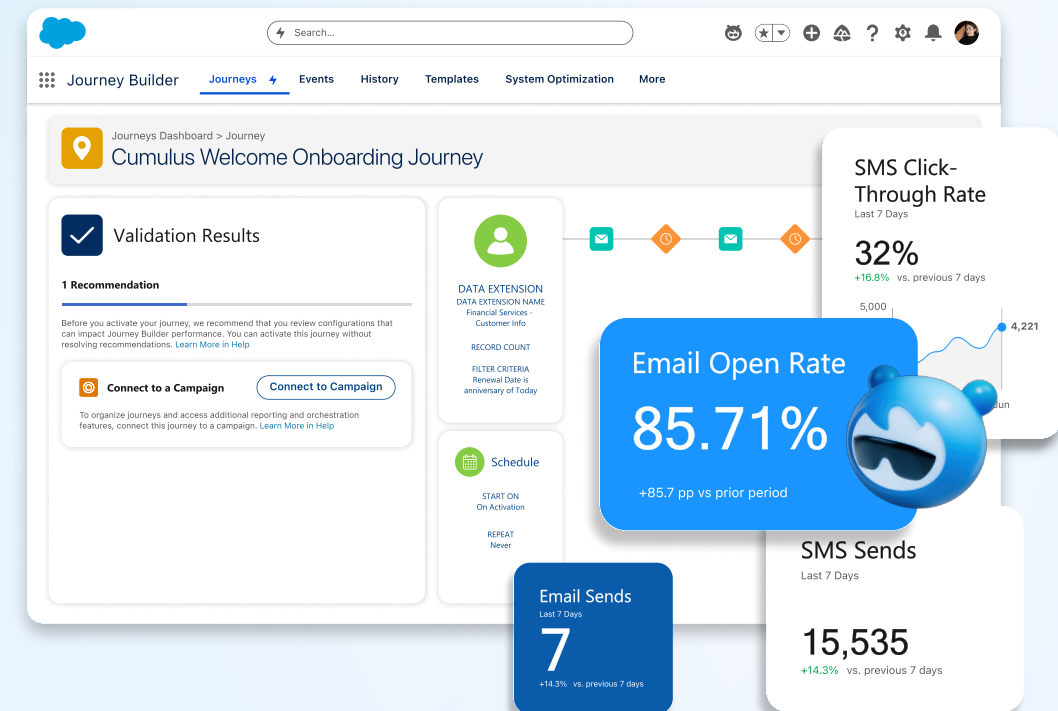


# How to get started with next-gen Marketing Cloud

## Organize campaigns with the Campaign workspace

Create a single source of truth for your campaign operations with Journey Builder data in Salesforce Campaigns. This also unlocks the ability to use Agentforce for campaign insights.

- a. From Marketing Cloud Engagement, navigate to an active journey in Journey Builder and click on the new “Connect to Campaign” link located to the left-hand of the version drop-down menu.
  - i. For journeys still in draft, there will be an option to “Connect to Campaign” when you go to activate the journey.
- b. You’ll then be taken to the next-gen Marketing Cloud app, where you can either create a new campaign or select from an already created campaign.
- c. Once the campaign is created, look for “Journeys” on the left-hand side of the page, and click on the plus symbol.
- d. Next, select the correct business unit, select the journeys you want to add from MCE, and click “Add.”
- e. After approximately one hour, you'll see your MCE journey data in the Campaign workspace and have a view of all your centralized campaign metrics.

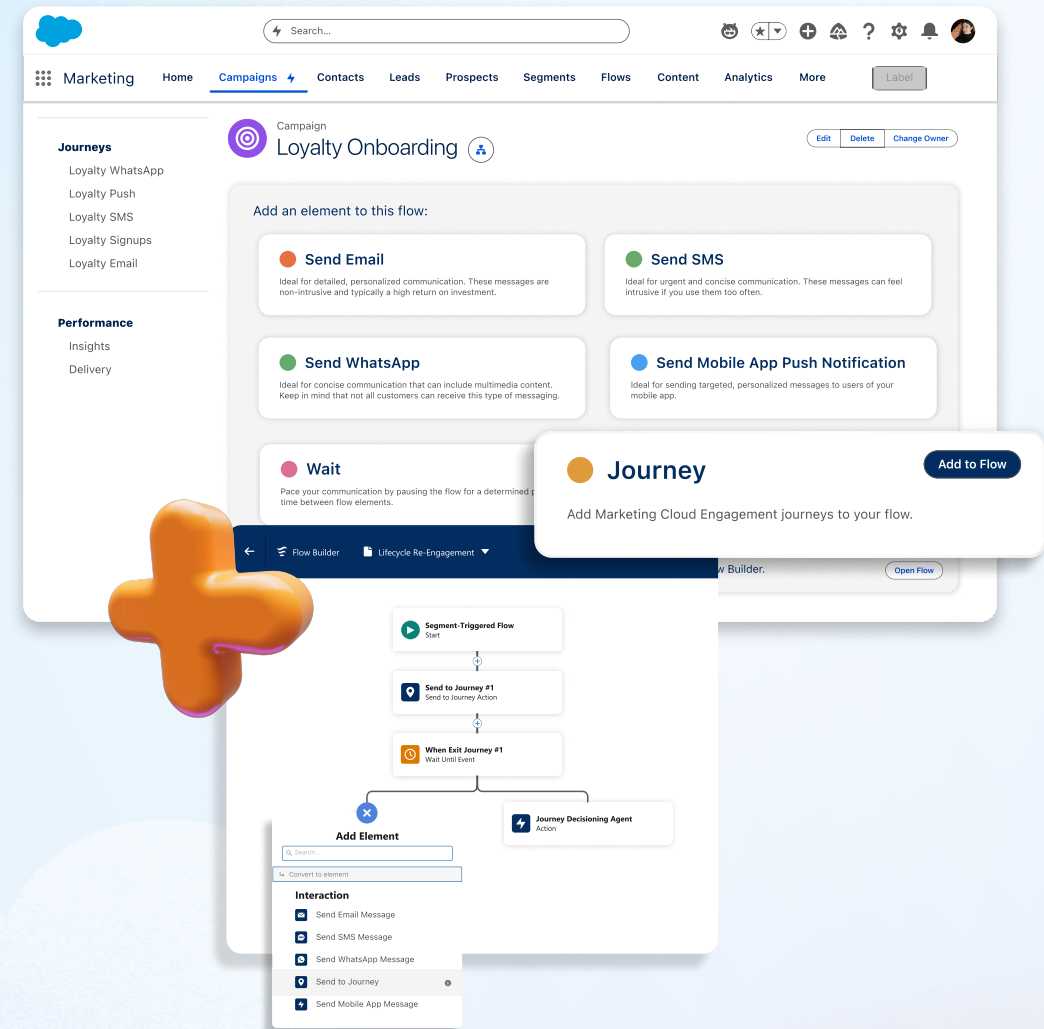


# How to get started with next-gen Marketing Cloud

## Start with cross-journey orchestration using Flow

Use Journey Builder and Flow to dynamically route individuals across multiple MCE journeys. This allows you to trigger MCE emails and journeys from Flow based on real-time events, segments, or data-driven decisions.

- a. To get started, navigate to Add to Flow in Campaigns.
- b. Examples
  - i. Send Data Cloud segments to Journey Builder.
  - ii. Use “Send to Journey” within Flow to link multiple journeys together.





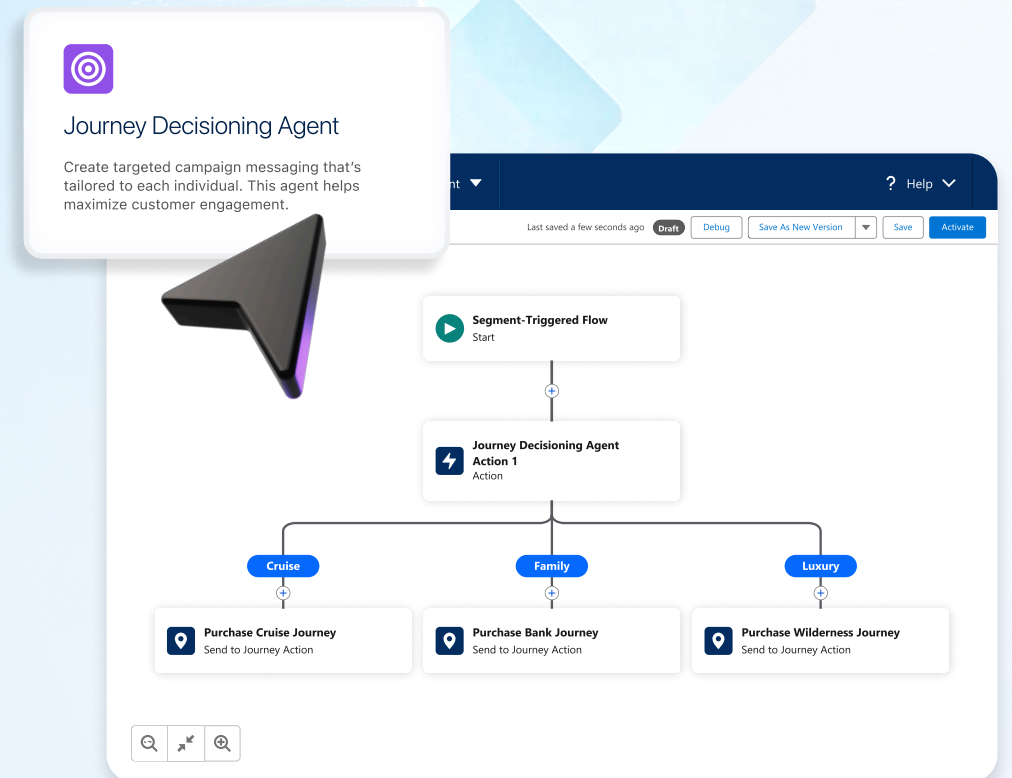
## 04

# How to get started with next-gen Marketing Cloud

## Explore agentic journey decisioning

Agentforce helps marketers increase efficiency and scale personalization by routing customers to the perfect journey at the perfect time, based on journey goals and profile data. It can also dynamically generate 1-to-1 personalized subject lines, calls to action, and body copy for each customer in a journey, based on their profile.

- First, you need to set up your new agent. Go to setup in your Salesforce Org, and type in “Agentforce Agents.”
- Next, click “New Agent,” and you'll see there's a template created, titled “Journey Decisioning Agent.”
- Then you will walk through the steps to set up your agent, including the template, topics, actions, and instructions.
- Walk through the steps for the use case setup (name the use case, select your MCE business unit, add your journeys, and provide journey context).
- Launch your use case.
- Add your new journey decisioning agent to your flow.

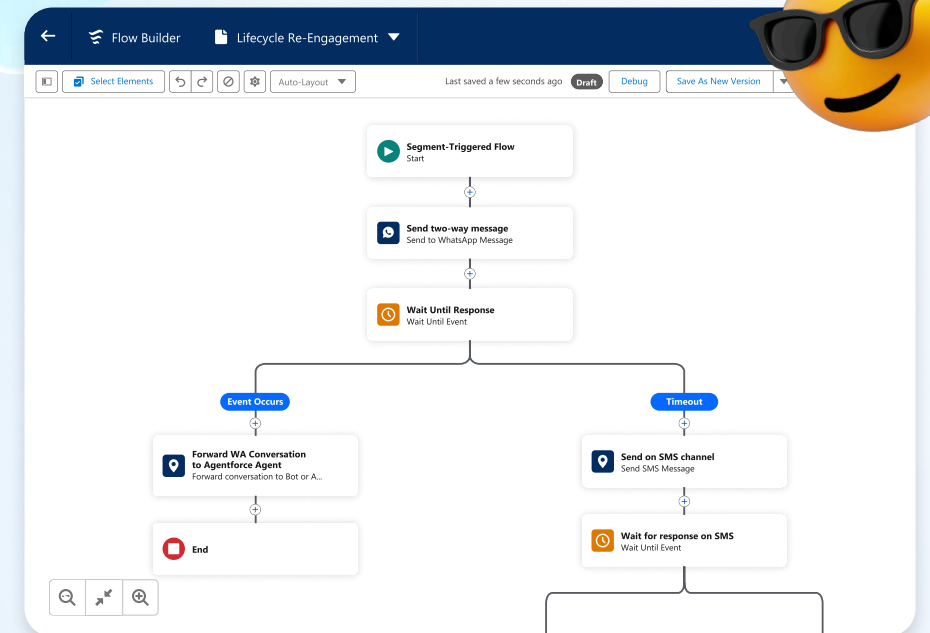


04

# How to get started with next-gen Marketing Cloud

## Adopt new channels for conversational engagement

If you're interested in new channels, consider net-new SMS or WhatsApp adoption in next-gen MC. Next-gen MC enables two-way conversational engagement and seamless handoffs to service, which isn't available in traditional MCE. This will require new SMS sender codes and subscriptions.





## Introduction/Intermediate/Advanced Use Cases

### Level of Effort

|                       | Introduction  | Intermediate   | Advanced   |
|-----------------------|---|--|--|
|                       | <p>Leverage existing Marketing Cloud Engagement (MCE) assets.</p> <p>Perform basic setup, and use immediate-value features to get started quickly and efficiently with minimal configuration.</p>   | <p>Expand on initial adoption by leveraging richer reporting, enhanced Flow experiences, and more sophisticated Agentforce-driven decisions.</p> <p>This stage involves a targeted effort across one MCE business unit.</p>  | <p>Expand into new channels and fully leverage advanced Agentforce and Flow capabilities for highly personalized and integrated customer experiences across the entire business ecosystem.</p>   |
| Reporting & Analytics | <p><b>Digital Wallet:</b> Easily track and monitor your messaging credit spend for email, SMS, mobile push, and WhatsApp in a self-serve dashboard; observe usage trends to better forecast budgets; and receive alerts to prevent unexpected overage fees.</p> <p><b>Enhanced SMS dashboards:</b> Interactive dashboards for SMS performance and deliverability.</p> | <p><b>Richer subscriber-level reporting:</b> Access more detailed reporting and segmentation for all channels, including WhatsApp and in-app messages.</p> <p><b>Marketing performance and campaign dashboards:</b> Track campaign performance with unified dashboards that provide clear visibility into deliverability and performance data across all emails and journeys. This includes attribute-enriched reports, custom dashboards, and the ability to report across both marketing and CRM data for deeper insights.</p> | <p><b>Custom dashboards:</b> Create custom dashboards and formulas based on your data to gain deeper insights into campaign performance.</p>   |
| Flow                  | <p><b>Send MCE emails from Flow:</b> Leverage events to trigger emails, surveys, and reengagement campaigns without the connector.</p> <p><b>Connect journeys via Flow:</b> Dynamically route individuals across multiple MCE journeys using out-of-the-box events, segments, or data-driven decisions.</p>   | <p><b>Cross-departmental workflows:</b> Implement more advanced workflows that span across departments, optimizing handoffs and enhancing the entire customer lifecycle.</p>   | <p><b>Two-way conversational engagement:</b> Engage customers in interactive, two-way SMS and WhatsApp conversations using Flow and Agentforce. This includes delivering promotional offers, assisting with product purchases, and providing customer service support, with seamless handoffs between marketing and service teams, leveraging newly expanded channels.</p> |
| Agentforce            | <p><b>Agentforce for campaign insights:</b> Gain early insights and recommendations for your marketing campaigns using Agentforce capabilities. This helps in supercharging existing campaigns with AI-driven intelligence.</p>   | <p><b>Agentic journey decisioning:</b> Autonomously guide customers on the next best journey based on real-time context, ensuring each customer is guided on the path most relevant to them.</p>   | <p><b>Agentforce-powered campaigns, segments, and journeys:</b> Deploy powerful AI agents to help build campaigns and segments that are optimized for your goals. The agent generates briefs, content, and customer journeys based on your predefined goals and guidelines.</p>  |
| Addtl. Use Cases      | <p><b>No-code segmentation:</b> Empower marketers to create highly targeted audience segments without needing SQL by using the drag-and-drop Segment Builder or natural language prompts with Segmentation Agent.</p> <p>These segments can then be directly activated in Flow to trigger existing customer journeys or MCE content.</p>                              |  |  |

# Additional Resources

AI Evolution



Marketing  
Cloud Next

## Unlock the AI Evolution with Next-Gen Marketing Cloud

Salesforce help article detailing the possibilities of next-gen Marketing Cloud with Marketing Cloud Engagement

[Explore the product](#)

Winter '26



Release  
Notes

## Winter '26 Release Notes

The Winter '26 release adds next-generation capabilities to your Marketing Cloud Engagement account

[Explore the product](#)

