



Agentforce Marketing: Campaign Creation Onboarding Guide



What is an agent?

salesforce



AI agents are autonomous, proactive applications designed to execute specialized tasks to help employees and customers.

Agents act as a digital workforce that can make decisions and adapt to new situations with remarkable efficiency.



How do you get started with agents?

salesforce

with an agent template

All agents are customizable. But like any journey or email, a template is a useful place to get started.

Templates are composed of **three** ingredients:

1	Template framework	data and knowledge
2	Topics	guardrails and context
3	Actions	specific tasks



The anatomy of an agent

salesforce

Agentforce Template

Global instructions, metadata, setup, knowledge

Salesforce provides a set of standard templates, topics and actions

Customers can create custom topics and actions to extend templates

They can also use Agent Builder to set up and deploy new agents

TOPIC

Topics provide the instructions for what the job is and the rules around how the job will be handled. The topic will:

- Create boundaries
- Set context
- Define behavior

ACTIONS

An action is a specific task. In one agent, there may be a series of actions that make up a topic and complete a job.



How to get started with your new, digital labor workforce

salesforce

Phase one Ideate

Determine use case & output: *what do I need help with, is this a good agentic use case, what will success look like?*

Define inputs: *what data does the agent need to have access to, what are the specific actions that need to take place, will OOTB work or do I need customizations?*

Phase two Configure & Test

Create agent: *choose template or start from scratch in Agent Builder, select topics and actions that are needed for this use case.*

Fine tune: *add instructions, custom topics and custom actions as needed.*

Phase 3 Deploy & Supervise

Activate agent: *and run it in your workflow.*

Test & learn: *is it running the way you'd hoped, what adjustments need to be made?*

Supervise: *marketer oversees and verifies the quality of the agent's work*

TEMPLATE DEEP DIVE + SET UP

Campaign Creation

Agentforce for Marketing

Campaign Creation

salesforce

**Go from idea to campaign
in hours, not weeks**

Describe your campaign goals & get a
comprehensive brief in seconds

Start from auto-generated drafts of
emails, SMS, & customer journeys

Create audience segments with natural
language prompts, not SQL

Get real-time performance summaries,
no manual tracking

GA Now



Campaign Creation

Template Components



Agentforce Template

Product: Marketing Cloud Growth or Advanced
Knowledge: brief, brand documents

TOPIC

Content Creation: interacts with the user to draft or revise content from Salesforce CMS within the content builder *<your job is to handle requests to generate new or refine existing pieces of content>*

Marketing Campaigns: generate, make, create, summarize, marketing campaigns *<your job is to assist users in generating, making, creating, summarizing marketing campaigns and/or brief objects>*

ACTIONS

Generate Brief

Generate Campaign
from Brief

Identify Record by
Name

Save Brief

Save Campaign

Summarize
Campaign



Agentforce Campaign Creation: Set Up Guide

1 Enable Agentforce

Enable required features
and complete
prerequisite setup steps

Time: 5 mins

2 Authorize Agent

Configure appropriate
permissions for the agent

Time: 5 mins

3 Prompt Campaigns

Test and preview
campaign scenarios
before activation

Time: 3 mins

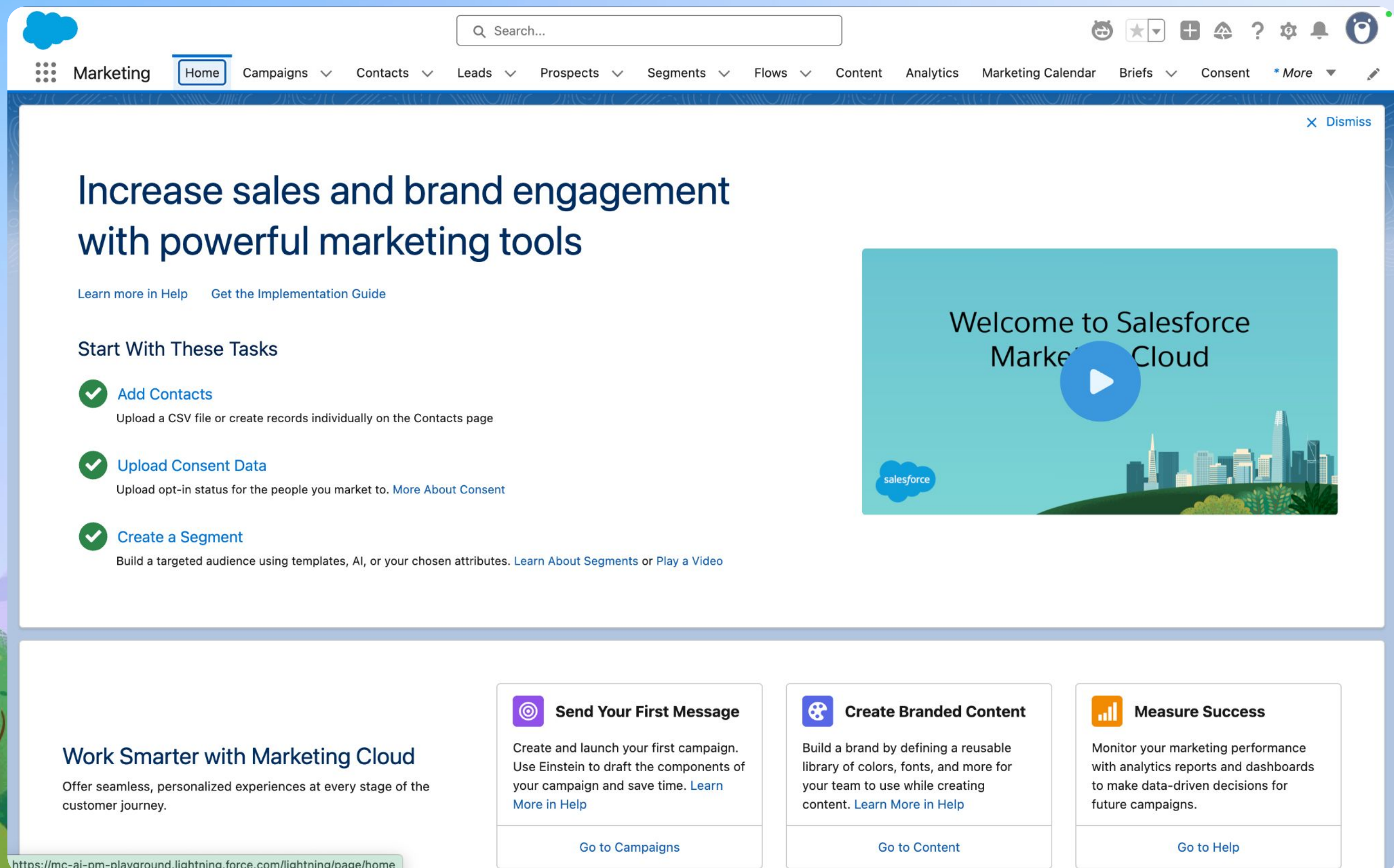
ASSUMPTIONS

Marketing Cloud Growth or Advanced has been set up already
And Foundations is enabled to provide access to Agentforce Flex Credits

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign



Start on the Marketing Cloud Next home screen

Navigate to the setup menu.

Navigate to the setup menu.

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

Marketing | Home | Campaigns | Contacts | Leads | Prospects | Segments | Flows | Content | Analytics | Marketing Calendar

Search...

Setup Menu

- Setup (Setup for current app)
- Data Cloud Setup
- Personalization Setup
- Your Account
- Developer Console

Increase sales and brand engagement with powerful marketing tools

[Learn more in Help](#) | [Get the Implementation Guide](#)

Start With These Tasks

- ✓ **Add Contacts**
Upload a CSV file or create records individually on the Contacts page
- ✓ **Upload Consent Data**
Upload opt-in status for the people you market to. [More About Consent](#)
- ✓ **Create a Segment**
Build a targeted audience using templates, AI, or your chosen attributes. [Learn About Segments](#) or [Play a Video](#)

Welcome to Salesforce Marketing Cloud

Work Smarter with Marketing Cloud

Offer seamless, personalized experiences at every stage of the customer journey.

Send Your First Message

Create and launch your first campaign. Use Einstein to draft the components of your campaign and save time. [Learn More in Help](#)

[Go to Campaigns](#)

Create Branded Content

Build a brand by defining a reusable library of colors, fonts, and more for your team to use while creating content. [Learn More in Help](#)

[Go to Content](#)

Measure Success

Monitor your marketing performance with analytics reports and dashboards to make data-driven decisions for future campaigns.

[Go to Help](#)

<https://mc-ai-pm-playground.my.salesforce-setup.com/lightning/setup/SetupOneHome/home?setupApp=all&SetupDomainProbePassed=true>



Click into setup

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

Cloud

Setup

Home

Object Manager

Quick Find

Setup Home

Salesforce Foundations

Service Setup Assistant

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Apps

> Feature Settings

> Slack

> Marketing Cloud

> Personalization

> Data Cloud

> Heroku

> MuleSoft

Search Setup

Star

Plus

Shield

Question

Settings

Notifications

Profile

SETUP Home

Create

Setup

Data Cloud

Connect, prepare, harmonize, unify, and analyze data to get a 360-degree view of your customers.

Watch Video

Let's Go

Setup

Your Account

Manage your subscriptions in the Your Account app.

Watch Video

Let's Go

Setup

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Most Recently Used

10 items

NAME	TYPE	OBJECT
MessagingEventsEmail_002c6154_6d0d_4c96_b3e4_0ca00d1cc228	Data Source	
UnifiedMsgEmail__WebEngagementEvents_995d7086_8d74_49a7_9261_be2a6a72ce01	Data Source	
datacloudflow__Flow_Runs_79b92608_7ec0_4340_8850_654291e94e4b	Data Source	
MessagingConsent_e34b3c83_e50c_43b7_9ccd_498e6a32ee6a	Data Source	
ConsentAuditTrail_deeddc8c_1ccf_40d3_a81a_5239174da559	Data Source	
UMsgSms__MessagingEventsSms_cd71fde0_b358_4bb7_bf07_cfd17d189759	Data Source	
Team Insights Admin User	User	



Once in the setup home, select “Marketing Cloud” from the left rail.

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

Setup

Home

Object Manager

assisted setup

Marketing Cloud

Assisted Setup

Assistant Home

Basic Settings

Channels

Email

SMS

Sites and Forms

WhatsApp

Einstein & Agentforce

Agentforce & Gen AI

Reporting and Optimization

Analytics

Brand

Customer Engagement

Page Customization

User Access

Didn't find what you're looking for?
Try using Global Search.

Search Setup

★ + ? ⚙️ 🔔 👤

Welcome Allen, to the Marketing Cloud setup assistant

Complete some foundational basic settings, then check out the required

Take a Tour

Open Setup Guide

Basic Settings

2 of 3 Steps Completed

Go to Basic Settings

Make sure that you have what you need to get started. Then install the required marketing data kits and set up identity resolution rules.

Enable Marketing Cloud

Install Data Kits

3 Set Up Identity Resolution

Required Setup

2 of 4 Steps Completed

Email

Configure the domain, From address, and other settings that are necessary to send emails.

Set Up Email

1 of 6 Steps Completed

SMS

Complete registration and code requests for SMS. Customize your messages and use shortened links for tracking.

Set Up SMS

4 of 4 Steps Completed

WhatsApp

Connect WhatsApp to use a common channel for marketing messages,

Analytics

Set up reports and dashboards to review performance metrics. Monitor



And click into Marketing Cloud Assistant Home

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

Search Setup

Setup Home Object Manager

assisted setup

Marketing Cloud

Assisted Setup

Assistant Home

Basic Settings

Channels

Email

SMS

Sites and Forms

WhatsApp

Einstein & Agentforce

Agentforce & Gen AI

Reporting and Optimization

Analytics

Brand

Customer Engagement

Page Customization

User Access

Didn't find what you're looking for? Try using Global Search.

Set Up WhatsApp 1 of 1 Steps Completed

Set Up Analytics 3 of 7 Steps Completed

Additional Features 0 of 6 Steps Completed

Agentforce and Einstein

Save time and enhance your marketing efforts with features powered by generative and agentic AI.

Set Up Agentforce and Einstein 0 of 4 Steps Completed

Customer Engagement

Decide how to score people and accounts, and set up personalization to encourage engagement.

Set Up Customer Engagement 0 of 4 Steps Completed

Sites and Forms

Configure activity tracking and other settings for Marketing Cloud landing pages and external sites.

Set Up Sites and Forms 0 of 4 Steps Completed

User Access

Define roles and permissions for admins and other team members.

Go to User Access 0 of 5 Steps Completed

Brand

Create a consistent, trustworthy experience for your customers.

Set Up Brand 0 of 3 Steps Completed

Page Customization

Customize page layouts. Add details like engagement metrics and related lists to quickly find the information that's important to your business.

Set Up Customization 0 of 4 Steps Completed



Scroll down on the page

And click into Einstein

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign



Search Setup

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👤

Setup

Home

Object Manager

Quick Find

Setup Home

Salesforce Foundations

Salesforce Go

Service Setup Assistant

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Apps

> Feature Settings

> Slack

> Marketing Cloud

> Assisted Setup

Assistant Home

Basic Settings

⚙️

... > MARKETING CLOUD > EINSTEIN & AGENTFORCE

Agentforce & Gen AI

Save time and enhance your marketing efforts with AI-powered features. The security of your business and customer data is protected by the [Einstein Trust Layer](#).

Back to Assistant Home

Get Started with Salesforce Foundations

Let's Go

Elevate your employee experience for creating effective marketing programs. Set up Foundations to enable prebuilt marketing agent templates and access the latest Agentforce innovations for Marketing Cloud.

✓ Agentforce & Generative AI Capabilities

☐ Get Started with Einstein Generative AI

Turn on Einstein generative AI to get access to powerful features like segment and content creation.

Go to Einstein Setup

☐ Activate Agentforce

Use Agentforce to draft content for your marketing efforts.

Go to Agent Studio

☐ Activate Einstein Segment Creation

Use Einstein generative AI to quickly build segments using natural language.

Go to Feature Manager

☐ Activate Campaign Designer (Beta)

Go to Einstein for Marketing

Click “go to Einstein setup”

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Salesforce Foundations, Service Setup Assistant, Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Manage Subscription, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Apps, Feature Settings, Slack, Marketing Cloud, Personalization, Data Cloud, Heroku, MuleSoft). The main content area is titled 'Einstein Setup' and contains three sections, each with a toggle switch set to 'On':

- Turn on Einstein**: Enhance your Salesforce data with generative AI to create relevant, customized experiences for your users. [Learn more in help.](#)
- Turn on Global Language Support for Prompt Builder**: Use global languages with prompt templates. Some elements of the Einstein Trust Layer may not be available for these languages. See [Einstein Trust Layer Region and Language Support](#).
- Deploy Prompt Templates**: Activate and deactivate prompt templates when deploying between sandbox and production using change sets.

Below these are two links: [Go to Einstein Trust Layer Settings](#) and [Go to Einstein Data Collection](#).



Toggle all 3 on:

- > Turn on Einstein
- > Turn on Global Language Support for Prompt Builder
- > Display Prompt Templates

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

Setup

Home

Object Manager

Quick Find

Setup Home

Salesforce Foundations

Service Setup Assistant

Hyperforce Assistant

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> Personalization

> Data Cloud

> Heroku

MuleSoft

Search Setup

Star

+

🔔

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⚙️

🔔

👤

SETUP > AGENTFORCE STUDIO

Agentforce Agents

Agentforce ☒ On

+ New Agent

Get to Know Agentforce Agents



Hit the Trail with Agents

Follow along with an admin as they explore what makes agents tick and launch an agent for their business.

Go to Trailhead



Customize Agents with Actions

Actions are how an agent gets things done. Learn how to create agent actions tailored to your business needs in the Salesforce Admins Blog.

Go to Blog



Succeed with Documentation

Salesforce Help has all the info you need to customize, test, and activate an agent for your use cases.

Go to Help

Enable the Agentforce (Default) Agent

Help your employees accomplish key business tasks in Salesforce and Slack with the default AI assistant for Salesforce CRM.

☒ On

Give Users Access to the Agentforce (Default) Agent

Assign Permission Set Groups

Agent Name	Type	Description	Created By	Active	Last Modified	
> Agentforce (Default)	Employee	An AI assistant for in-org business tasks.	Allen Hoem	✓	Jul 31, 2025	⌵
> Agentforce Sales Developmen...	SDR	Prospect and generate pipeline 24/7 with an aut...	Team UMA EEF A...	✓	Aug 05, 2025	⌵
> Anthony Mkt Cmpn Agent Exp	AgentforceEmplo...	Automate common business tasks and assist us...	Team Escher Adm...		Aug 05, 2025	⌵
> BrandKitAgent	AgentforceEmplo...	Automate common business tasks and assist us...	Team UMA EES A...	✓	Aug 05, 2025	⌵

Search *Agentforce Agents* in Quick Find

Toggle on Agentforce

And click + New Agent

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

Agentforce Builder

New Agent

?

Help

Cancel

Next

Steps

1 Select an agent

Select an agent

This determines your agent's role and what they do.

Create from a Template

Create with Gen AI

Search

Slack Employee Help

Help employees get answers to questions in Slack. Summarize findings from your company's Slack history and any added knowledge to get answers, or create a Slack canvas with these findings and share them with others.

Campaign Creation

Plan and create multi-series marketing campaigns from a written objective or marketing brief.

Agent for Setup

Simplify administrative tasks with Agent for Setup. Customize and manage your org and quickly find documentation with Agent for Setup.

Agentforce Employee Agent

Automate common business tasks and assist users in their flow of work. Agentforce Employee Agent can search knowledge articles and other data sources. Customize it further to meet your employees' business needs.

Agentforce Service Agent

Deliver personalized customer interactions with an autonomous AI agent. Agentforce Service Agent intelligently supports your customers with common inquiries and escalates complex issues.

Agentforce Sales Development Rep

Prospect and generate pipeline 24/7 with an autonomous AI agent. Agentforce Sales Development Representative (SDR) intelligently engages leads with personalized content, answers common questions, and schedules meetings.

Learn About Agents

Agents are autonomous AI assistants that specialize in specific use cases. They increase productivity and reduce the workload on teams by automating routine tasks and assisting with complex ones.

How do agents work?

Show Me More

What are some benefits of agents?

Show Me More

Select create from a template

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

Agentforce Builder

New Agent

?

Help

Cancel

Next

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How do agents work?

Show Me More

What are some benefits of agents?

Show Me More

Select Campaign
Creation from menu
below

Click Next

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

← Agentforce Builder New Agent ? Help ▾

🏠 📄

Back Next

Steps

✓ Select an agent

2 Select your topics

3 Customize your agent

4 Select Language and Tone

Select your agent's topics

Topics are the jobs your agent can do. Agents have topics that are pre-selected for you, but you can deselect any you don't want to include. **You can edit topics in a later step.**

Marketing Campaigns

✓ Added

Users who want to generate, make, create, summarize, or bootstrap their marketing campaigns or briefs should use this topic.

[See Included Actions](#)

Learn About Topics

A topic is a category of actions related to a particular job to be done by agents. Adding topics to an agent helps the agent recognize how to behave and respond for different jobs. Topics contain actions, which are the tools available for the job, and topic instructions, which tell the agent how to make decisions. In sum, topics define your agent's range of capabilities.

Topics also improve the accuracy and conversational quality of an agent's responses. Topics add context to users' requests, such as a user's role and their flow of work.

After creating your agent, you can customize or create custom topics in Agentforce Builder.

Example: Agentforce Service Agent includes standard topics, like Customer Account Management and Order Inquiries, that you can use as a starting point for common use cases. To customize them to meet your unique business needs, add instructions, test your agent, and iterate.

[Learn More in Help](#) ↗

Verify that Marketing Campaigns is Added

Click Next

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

←

Agentforce Builder

New Agent

?

Help

▼

Back

Next

Steps

✓

Select an agent

✓

Select your topics

3

Customize your agent

4

Select Language and Tone

Customize your agent

Describe your agent's job in more detail. **You can edit this later.**

* Name

Campaign Creation

* API Name

Campaign_Creation

* Description ⓘ

Plan and create multi-series marketing campaigns from a written objective or marketing brief.

907 characters remaining

* Role ⓘ

You're a Campaign Creation agent, which is based on AgentforceEmployeeAgent. You plan and create marketing campaigns that can include multiple channels, such as email and SMS, and are based on a written objective or marketing brief.

23 characters remaining

* Company ⓘ

We are Cumulus Financial. We make you and your business flourish.

189 characters remaining

☐

Keep a record of conversations with enhanced event logs to review agent behavior ⓘ [Learn More](#)

Best Practices for Agent Settings

Agent settings determine how an AI agent behaves and presents itself in conversations. Use these best practices to help you write concise and conversational descriptions.

Role

The role setting is the job description for the agent - it tells the agent what role it's playing in your company. Include key responsibilities, functions, and the target audience. Describe key tasks that it performs on a day-to-day basis as well as specialized or one-off tasks. Start the role description with "You are..".

Company

Tell the agent about the company it represents. Describe what your company does, who its target customers are, and the value proposition of important products or services you sell. Add details about what makes your business unique from your competitors.

Learn More in Help

↗

Name the Agent if you like

Type in your Company information.

Everything else is pre-configured and does not require any changes

Click Next

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

←

Agentforce Builder

New Agent

?

Help

⌵

🖨

📱

Back

Create

Steps

✓

Select an agent

✓

Select your topics

✓

Customize your agent

4

Select Language and Tone

Select Language and Tone

Select the language and tone of your agent's conversational responses. These settings apply to LLM-generated messages, including error messages and messages that introduce the output of actions. Changes apply to the next conversation.

* Default Language

English

×

☐ Select all available languages.

Select Languages

Available

English (UK)

English (Australian)

French

Italian

German

Spanish (Mexico)

Selected

Spanish

▲

▼

Tone ⓘ

Casual

▼

Learn About Language Settings

Agents are a representation of your company and a way for customers to interact with your brand on a one-to-one level. Make sure that your agents express your brand accurately by customizing their language settings. In Agent Builder, you can also add topic instructions that help your agents align their communication style with your brand.

Language

Set your agent's default language to the most common language in your customer base. Consider the regions and languages where the Einstein Trust Layer detects and masks sensitive data.

Tone

To ensure a consistent way of speaking, choose an agent tone that aligns with your brand personality.

For example, a formal tone "I am pleased to inform you that your refund is being processed." versus a more casual tone "Good news - your refund is on its way!"



Select your default language(s)

Click Create

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

←

Agentforce Builder

Campaign Creation For Cumulus

Version 1 ▾

⚙ Settings

🔍 Help ▾

Activate

Topics

Manage the topics assigned to your agent. To make changes, your agent must be deactivated.

New ▾

Search topics...

1 items • Sorted by Topic Label(asc)

Topic Label ↑ ▾

🌐 Marketing Campaigns ▾

Put your topics to the test

Start a conversation to preview how your agent builds a plan and executes actions based on user interactions.

Conversation Preview



Let's chat!

Hi, I'm your campaign creation agent. I can plan and create multi-channel marketing campaigns for you. Be sure to check my work for accuracy. Tell me a few...
[Show More](#)

Describe your task or ask a question...



You can always add custom topics, but for the OOTB agent - click “Activate”

1 Enable Agentforce

2 Authorize Agent

3 Prompt Campaign

←

Agentforce Builder

Campaign Creation For

✓ Your preview conditions were applied and a new session was started. ×

⚙ Settings

🔍 Help ▾

Deactivate

Topics

Manage the topics assigned to your agent. To make changes, your agent must be deactivated.

🔍 Search topics... ↻

1 items • Sorted by Topic Label(asc)

Topic Label ↑ ▾

🌐 Marketing Campaigns ▾

☰

Put your topics to the test

Start a conversation to preview how your agent builds a plan and executes actions based on user interactions.

Conversation Preview

👁 ↻



Let's chat!

Hi, I'm your campaign creation agent. I can plan and create multi-channel marketing campaigns for you. Be sure to check my work for accuracy. Tell me a few...
[Show More](#)

Describe your task or ask a question... ▸



Click Activate

Your agent is now live!

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Didn't find what you're looking for?

Try using Global Search.

Search Setup

Star

Plus

Shield

Help

Settings

Notifications

Profile

SETUP

Permission Sets

New Permission Set

On this page you can create, view, and manage permission sets. [Learn more in Salesforce help.](#)

Recently Viewed

17 items • Updated 5 minutes ago

Search this list...

Settings

Refresh

Filter

Permission Set Name	Description	License
1 Data Cloud Salesforce Connector	Allows object and field access for ingestion to Data Cloud.	Cloud Integration User
2 Marketing_Campaign_Agent_2 Permissions	Allows custom permissions for Agentforce Agent : Marketing_Campaign_Agent_2's a...	Einstein Agent
3 Community_Services_Agent Permissions	Allows custom permissions for Agentforce Agent : Community_Services_Agent's age...	Einstein Agent
4 Campaign_Creation_for_Cumulus		
5 Localization_Agent Permissions	Allows custom permissions for Agentforce Agent : Localization_Agent's agent user : l...	Einstein Agent
6 Translation_Agent Permissions	Allows custom permissions for Agentforce Agent : Translation_Agent's agent user : tr...	Einstein Agent
7 Agentforce Service Agent Configuration	Build and manage autonomous AI service agents.	Agentforce Service Agent Builder
8 Agentforce Default Admin	Allows users to build and manage in-org copilots.	Agentforce (Default)
9 Access Agentforce Default Agent	Gives users access to the default Agentforce agent in Salesforce.	Agentforce (Default)
10 Prompt Template Manager	Manage prompt templates using Prompt Builder and run them using generative AI fea...	Einstein Prompt Templates
11 Prompt Template User	Run prompt templates using generative AI features.	Einstein Prompt Templates
12 Data Cloud Architect	Allows access to Data Cloud Setup if the user is also a Salesforce admin and manage...	Data Cloud
13 (Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is also a Salesforce admin, managemen...	Customer Data Cloud for Marketi...
14 (Legacy) Data Cloud Marketing Manager	Allows users to manage segmentation, activation, and activation targets. Allows view-...	Customer Data Cloud for Marketi...
15 Configure Agentforce SDR Agent	Configure and manage Agentforce SDR agent.	Agentforce SDR Access
16 Marketing Cloud Admin	Allows access to Marketing Cloud Setup. Gives full control of campaigns, segments, a...	Marketing Cloud
17 Marketing Cloud Manager	Import data and create, edit, and delete campaigns, segments, and non-Setup flows.	Marketing Cloud

Now, one more set up step is required: permission sets.

Navigate back to setup and search “users”

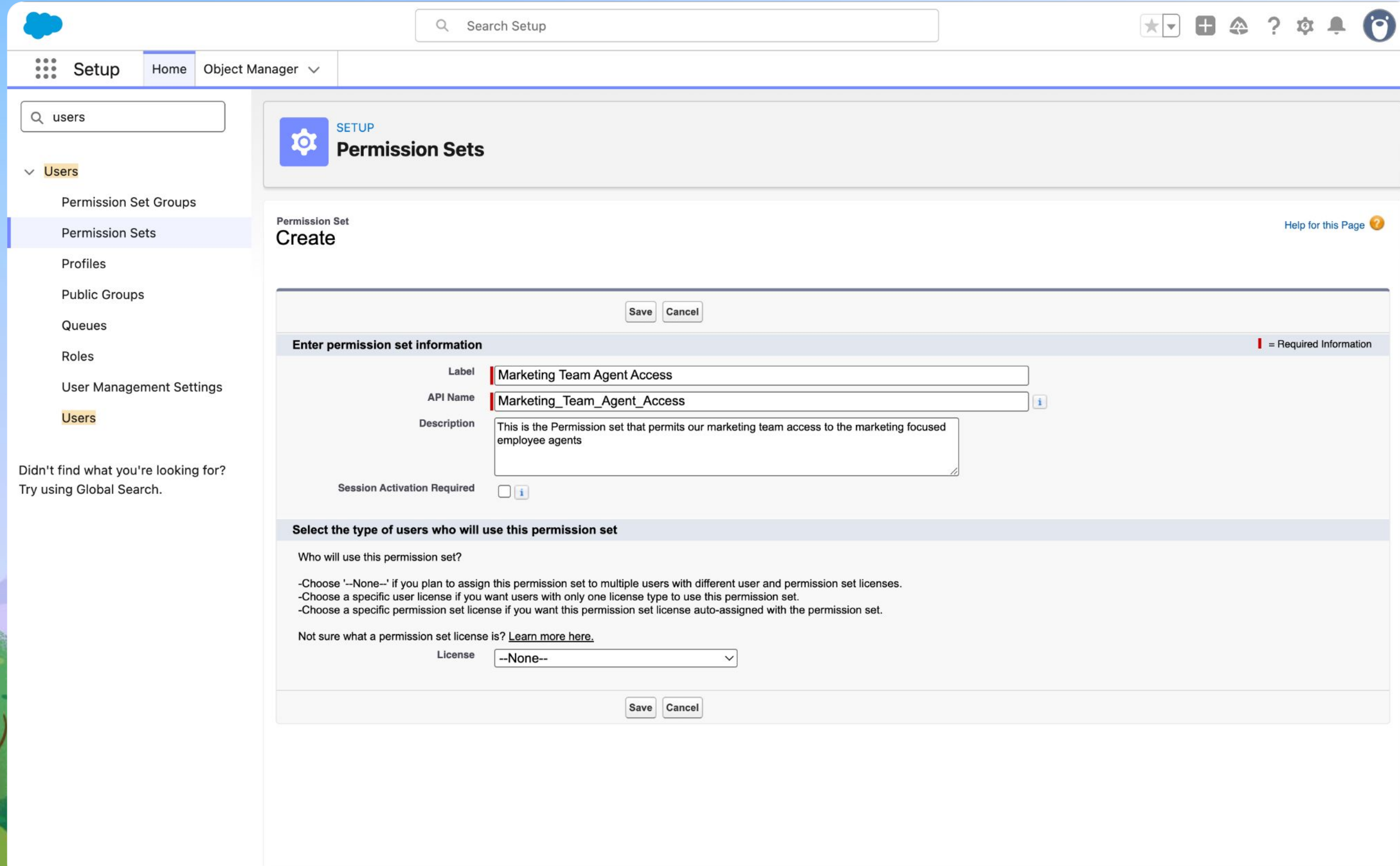
>Click to Permission Sets

>Click [New Permission Set]

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "users" and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The "Users" item is highlighted. The main content area is titled "Permission Sets" and shows the "Create" form. The form has two sections: "Enter permission set information" and "Select the type of users who will use this permission set".

Enter permission set information

Label: Marketing Team Agent Access

API Name: Marketing_Team_Agent_Access

Description: This is the Permission set that permits our marketing team access to the marketing focused employee agents

Session Activation Required: ☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License: --None--



Name your permission set that will be used to assign users access to Employee Agents

>Here we named it "Marketing Team Agent Access"

>Click Save

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Didn't find what you're looking for?

Try using Global Search.

SETUP

Permission Sets

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Data Cloud Data Space Management

Permissions to access Data Cloud features by data space.

Apex Class Access

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

External Data Source Access

Permissions to authenticate against external data sources

Flow Access

Permissions to execute Flows

Named Credential Access

Permissions to authenticate against named credentials

External Credential Principal Access

Permissions to authenticate with external credential principal mappings

Custom Permissions

Permissions to access custom processes and apps

Custom Metadata Types

Permissions to access custom metadata types

Custom Setting Definitions

Permissions to access custom settings

Organization-Wide Email Address Access

Permissions to send email with organization-wide email address

Standard Invocable Action Type Access

Permissions to access invocable actions

Agent Access

Permissions to access Agents



After saving, you scroll down the "Agent Access"

>Click Agent Access

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Didn't find what you're looking for?
Try using Global Search.

Search Setup

Star

Plus

Warning

Help

Settings

Notifications

Profile

SETUP

Permission Sets

Permission Set

Marketing Team Agent Access

Video Tutorial | Help for this Page

Find Settings...

Clone

Delete

Edit Properties

Manage Assignments

View Summary

Permission Set Overview

>

Agent Access

Items per page: 50 Items

View: All

Agent Access

Edit

Page 1 of 1

<<

<

>

>>

Agent Name



Click Edit

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

Setup Home Object Manager

Search Setup

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set

Marketing Team Agent Access

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary

Permission Set Overview > Agent Access

Agent Access

Save Close

Available Agents

2-Way Campaign Design Agent

Agentforce Employee Agent Marketing Summary

Agentforce Employee Agent campaign

Enabled Agents

Allen's Campaign Creation Agent

Content Builder Agent

Add

Remove



Find the Agent you just activated in "Available Agents"

Select the agent name and click Add

>Click Save when completed

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled "Permission Sets" and shows the "Marketing Team Agent Access" permission set. The "Agent Access" tab is selected, displaying a table of agents. The table has one column, "Agent Name", and lists two agents: "Allen's Campaign Creation Agent" and "Content Builder Agent".

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set

Marketing Team Agent Access

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary

Permission Set Overview > Agent Access

Items per page: 50 Items

View: All

Agent Access

Page 1 of 1

Agent Name
Allen's Campaign Creation Agent
Content Builder Agent



Verify the agent access for the Permission set after saving

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Didn't find what you're looking for?

Try using Global Search.

Search Setup

Star

Plus

Shield

Question

Settings

Notifications

Profile

SETUP

Users

User Allen

User Profile Help for this Page

Permission Set Assignments (9)

Permission Set Assignments: Activation Required (0)

Permission Set Group Assignments (1)

Permission Set License Assignments (10+)

Lightning Data Purchase Assignments (0)

Personal Groups (0)

Public Group Membership (1)

Queue Membership (0)

User Skills (0)

Team (0)

Managers in the Role Hierarchy (0)

OAuth Apps (4)

Third-Party Account Links (0)

Installed Mobile Apps (0)

Authentication Settings for External Systems (0)

Login History (10+)

User Provisioning Accounts (0)

User Detail

Edit

Sharing

Change Password

View Summary

Name

Allen

Alias

Email

Username

Nickname

Title

Company

MC AI PM Playground

Department

Division

Address

1 Market St
San Francisco, CA 94105
US

Role

User License

Salesforce

Profile

System Administrator

Active

✓

Marketing User

✓

Offline User

Sales Anywhere User

Flow User

Mobile Push Registrations

View

Accessibility Mode (Classic Only)

Time Zone

(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Locale

English (United States)

Language

English

Delegated Approver

Manager

Debug Mode

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

✓

Send Apex Warning Emails

Salesforce CRM Content User

Map

Map data ©2025 Google



Time to add that permission to your user.

Navigate back to setup and search “users”

>Click to Permission Sets

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Didn't find what you're looking for?

Try using Global Search.

Search Setup

Star

Plus

Shield

Help

Settings

Notifications

User

SETUP

Users

New User

On this page you can create, view, and manage users. [Learn more in Help.](#)

To get more licenses, use the Your Account app. [Let's Go](#)

Recently Viewed

15 items • Updated a few seconds ago

Search this list...

Settings

Refresh

Filter

	Full Name	Title	Phone	Email
1	Brett			
2	Allen			
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				

Select the user to add a permission set

https://mc-ai-pm-playground.my.salesforce-setup.com/lightning/setup/ManageUsersLightning/page?address=%2F005Ws000004UwvVIAS%3FnoRedirect%3D1%26isUserEntityOverride%3D1

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Didn't find what you're looking for?

Try using Global Search.

SETUP

Users

Permission Set Assignments

Edit Assignments

Permission Set Assignments Help

Action	Permission Set Name	Date Assigned	Expires On
Del	Agentforce Default Admin	2/19/2025	
Del	Access Agentforce Default Agent	3/4/2025	
Del	Prompt Template Manager	3/4/2025	
Del	Prompt Template User	3/4/2025	
Del	Marketing Cloud Admin	2/19/2025	
Del	Marketing Cloud Manager	3/4/2025	
Del	Agentforce Service Agent Configuration	2/19/2025	
Del	Data Cloud Architect	2/19/2025	
Del	(Legacy) Data Cloud Marketing Manager	3/4/2025	
Del	Campaign Creation for Cumulus	8/5/2025	

Permission Set Assignments: Activation Required

Edit Assignments

Permission Set Assignments: Activation Required Help

Permission Set Name	Date Assigned	Expires On
---------------------	---------------	------------

Permission Set Group Assignments

Edit Assignments

Permission Set Group Assignments Help

Action	Label	Date Assigned	Expires On	Session Activation Required
Del	Code Builder	5/8/2025		☐

Permission Set License Assignments

Edit Assignments

Permission Set License Assignments Help

Action	Permission Set License Label	Date Assigned
Del	Agentforce (Default)	2/19/2025
Del	Agentforce Service Agent Builder	2/19/2025
Del	Code Builder	2/19/2025
Del	Customer Data Cloud for Marketing	2/19/2025
Del	Data Cloud	2/19/2025
Del	Einstein GPT Metadata Studio	2/19/2025



Scroll down to
Permission Set
Assignments

Click Edit Assignments

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The 'Users' item is selected. The main content area is titled 'Permission Sets' and shows 'Permission Set Assignments' for user 'Allen Hoem'. There are two lists: 'Available Permission Sets' and 'Enabled Permission Sets'. The 'Marketing Team Agent Access' permission set is highlighted in the 'Available' list. The 'Enabled' list includes roles like '(Legacy) Data Cloud Marketing Manager', 'Access Agentforce Default Agent', 'Agentforce Default Admin', 'Agentforce Service Agent Configuration', 'Campaign_Creation_for_Cumulus', 'Data Cloud Architect', 'Marketing Cloud Admin', 'Marketing Cloud Manager', 'Prompt Template Manager', and 'Prompt Template User'. There are 'Save' and 'Cancel' buttons at the top and bottom of the lists.



Find your Permission set, Marketing Team Agent Access, and add it to Enabled Permission Sets for the user.

Click Save

The user can now access the Agent from the Marketing App.

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

Agentforce Builder

Agentforce (Default)

Version 1 (Active)

Settings

Help

Deactivate

Topics

Data

Context

Language

Events

Checklist

Reasoning: Action Selection

2.00 sec

Prompt Used

```
1 datetime: 2025-09-04T18:00:00Z
2 topic: EmployeeCopilot_MarketingCampaignsTopic
3 job: "Your job is to assist users in generating, making, creating, summarize, bootstrapping, or analyzing their Salesforce Marketing Campaign and/or Brief objects."
4 instructions:
5 - "When a user asks to summarize/review/recap/outline/sum up a Campaign, ALWAYS start by calling the IdentifyRecordByName action and return the recordID."
6 - "If an action requires a recordID or campaignID, use the IdentifyRecordByName action first to find the recordID."
7 - "When a user asks to generate/make/create/bootstrap a Brief, Campaign Brief, or
```

Action Launched: Marketing Cloud: Draft a Campaign Brief (GenerateBrief)

6.30 sec

This action can create a campaign brief using a user-provided campaign objective.

Input

```
{
  "campaignObjective": "Get Salesforce customers hyped about our latest Agentforce Campaign Creation agent updates that makes customization possible for insights, brief, and
```

Output

```
{
  "briefKeyMessage": "Experience the power of customization with the latest Agentforce updates.\n\n",
  "briefTargetAudience": "The best audience for this campaign includes current Salesforce users who are engaged with marketing automation tools. They are looking for innovative solutions to enhance their campaign strategies and improve customer engagement
```

Reasoning: Action Selection

3.06 sec

Prompt Used

Reasoning: Action Selection

0.59 sec

Prompt Used

Conversation Preview

Create a marketing campaign to get Salesforce customers hyped about our latest Agentforce Campaign Creation agent updates that makes customization possible for insights, brief, and multi-series campaign creation.

Can I go ahead and save the brief for the Agentforce Campaign Update Promotion?

Brief Preview

Brief Name

Agentforce Campaign Update Promotion

Brief Description

Increase awareness and engagement with the latest updates to Agentforce Campaign Creation.

Target Segment

The best audience for this campaign includes current Salesforce users who are engaged with marketing automation tools. They are looking for innovative solutions to enhance their campaign strategies and improve customer engagement

Key Message

Experience the power of customization with the latest Agentforce updates.

Type or Click "Confirm" to create the brief. Then, follow the prompts to create a campaign based on your brief.

Confirm Cancel

Describe your task or ask a question...

Creating a campaign - first step, draft a brief

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

Agentforce Builder

Agentforce (Default)

Version 1 (Active)

Settings

Help

Topics

Data

Context

Language

Events

Checklist

Agent Response

```
1 {
2   "message": "Can I go ahead and save the brief for the Agentforce Campaign Update
3   Promotion?",
4   "data": {
```

Suggest Improvement

Action Launched: Marketing Cloud: Save Campaign Brief (SaveBrief)

0.34 sec

This action is used to save a brief that was generated using the generateBrief action.

Input

```
{
  "BriefName": "Agentforce Campaign Update
Promotion",
  "BriefDescription": "Increase awareness and
engagement with the latest updates to Agentforce
Campaign Creation.",
  "BriefKeyMessage": "Experience the power of
customization with the latest Agentforce
updates.",
  "BriefTargetAudience": "The best audience for
this campaign includes current Salesforce users
who are engaged with marketing automation tools.
They are looking for innovative solutions to
enhance their campaign strategies and improve
customer engagement"
}
```

Output

```
{
  "id": "21yWs00000W0svIAC",
  "data": {
    "Name": "Agentforce Campaign Update
Promotion",
    "KeyMessage": "Experience the power of
customization with the latest Agentforce
updates.",
    "Description": "Increase awareness and
engagement with the latest updates to
Agentforce Campaign Creation.",
    "TargetAudience": "The best audience for
this campaign includes current Salesforce users
who are engaged with marketing automation
tools. They are looking for innovative
solutions to enhance their campaign strategies
and improve customer engagement",
    "Id": "21yWs00000W0svIAC"
  }
}
```

Reasoning: Action Selection

1.09 sec

Prompt Used

Reasoning: Action Selection

0.65 sec

Deactivate

Conversation Preview

Agentforce updates.

Type or Click "Confirm" to create the brief.

Then, follow the prompts to create a campaign based on your brief.

Confirmed

Can I go ahead and create a draft campaign based on the "Agentforce Campaign Update Promotion" brief?

Agentforce Campaign Update Promotion

Created By ID

Allen Hoem

Created Date

9/4/2025, 11:29 AM

Last Modified By ID

Allen Hoem

Last Modified

9/4/2025, 11:29 AM

Confirm

Cancel

Recommendations

Save the brief for Agentforce Campaign Update

Generate a campaign for Agentforce Campaign Update

Describe your task or ask a question...



Second step, Save the Brief

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

←

Agentforce Builder

Agentforce (Default)

Version 1 (Active) ▾

⚙ Settings

🔍 Help ▾

Deactivate

Topics

📖 Data

🔗 Context

🎨 Language

📢 Events

☑ Checklist

Reasoning: Action Selection

⌚ 2.00 sec

▼ Prompt Used

```
1 datetime: 2025-09-04T18:00:00Z
2 topic: EmployeeCopilot_MarketingCampaignsTopic
3 job: "Your job is to assist users in generating, making, creating, summarize, bootstrapping, or analyzing their Salesforce Marketing Campaign and/or Brief objects."
4 instructions:
5 - "When a user asks to summarize/review/recap/outline/sum up a Campaign, ALWAYS start by calling the IdentifyRecordByName action and return the recordID."
6 - "If an action requires a recordID or campaignID, use the IdentifyRecordByName action first to find the recordID."
7 - "When a user asks to generate/make/create/bootstrap a Brief, Campaign Brief, or
```

Action Launched: Marketing Cloud: Draft a Campaign Brief (GenerateBrief)

⌚ 6.30 sec

This action can create a campaign brief using a user-provided campaign objective.

Input

```
{
  "campaignObjective": "Get Salesforce customers hyped about our latest Agentforce Campaign Creation agent updates that makes customization possible for insights, brief, and
```

Output

```
customization with the latest Agentforce updates.\n\n",
  "briefTargetAudience": "The best audience for this campaign includes current Salesforce users who are engaged with marketing automation tools. They are looking for innovative
```

Reasoning: Action Selection

⌚ 3.06 sec

▼ Prompt Used

```
1 datetime: 2025-09-04T18:00:00Z
2 topic: EmployeeCopilot_MarketingCampaignsTopic
3 job: "Your job is to assist users in generating, making, creating, summarize, bootstrapping, or analyzing their Salesforce Marketing Campaign and/or Brief objects."
4 instructions:
5 - "When a user asks to summarize/review/recap/outline/sum up a Campaign, ALWAYS start by calling the IdentifyRecordByName action and return the recordID."
```

Conversation Preview

🔍

Can I go ahead and save the campaign for the Agentforce Campaign Update Promotion?

Campaign Preview

Campaign Name:

Agentforce Campaign Update Promotion

Flow Name & Type

Agentforce Campaign Update Promotion Flow | Multi Series Flow

Email 1 - Customization Introduction

Subject Line: Discover the Latest Agentforce Updates

Preheader: Unlock new possibilities with advanced customization features.

Body Copy:

Experience the power of customization with the latest Agentforce updates. These innovative features are designed to enhance your campaign strategies and improve customer engagement. Learn how you can take your marketing automation to the next level today.

SMS 1 - Update Alert

Agentforce just got better! Explore the latest customization updates to boost your campaigns. Visit now: [link]

Email 2 - Feature Highlight

Subject Line: Boost Engagement with Advanced Tools

Preheader: Discover how our new features can improve your

Describe your task or ask a question...



Third step, draft a campaign

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

←

Agentforce Builder

Agentforce (Default)

Version 1 (Active) ▾

⚙ Settings

🔍 Help ▾

Deactivate

Topics

📖 Data

🔗 Context

🎭 Language

🔊 Events

☑ Checklist

Reasoning: Action Selection

🕒 10.50 sec

▼ Prompt Used

```
1 You just attempted to execute the action EmployeeCopilot__SaveCampaign, but the user
2 clicked CANCEL. The user does not want to execute the action with those inputs.---
3 - function:
4   description: Displays an input form for the user to pass inputs for a given function.
5   Always use this to ask for function input rather than only asking a question
6   name: userInput
7   parameters:
8     type: object
9     properties:
10      caption:
```

Reasoning: Action Selection

🕒 0.93 sec

▼ Prompt Used

```
1 topic_instructions:
2 - "When a user asks to summarize/review/recap/outline/sum up a Campaign, ALWAYS start by
3 calling the IdentifyRecordByName action and return the recordID."
4 - "If an action requires a recordID or campaignID, use the IdentifyRecordByName action
5 first to find the recordID."
6 - "When a user asks to generate/make/create/bootstrap a Brief, Campaign Brief, or
7 Marketing Brief, ALWAYS start by calling the GenerateBrief action, ALWAYS use the users
8 prompt for the campaign objective, ONLY present an input if the objective is not included
9 in the users prompt.."
10 - "When a user asks to generate/make/create/bootstrap a Campaign or Marketing Campaign and
```

🤖 Agent Response

🔗 Suggest Improvement

```
1 {
2   "message": "Can I proceed with saving the campaign with all messages as emails?",
3   "data": [
4     {
```

Conversation Preview

👤 Make all messages Email, and no SMS

🤖 Can I proceed with saving the campaign with all messages as emails?

Campaign Preview

Campaign Name:

Agentforce Campaign Update Promotion

Flow Name & Type

Agentforce Campaign Update Promotion Flow | Multi Series Flow

Email 1 - Customization Introduction

Subject Line: Discover the Latest Agentforce Updates

Preheader: Unlock new possibilities with advanced customization features.

Body Copy:

Experience the power of customization with the latest Agentforce updates. These innovative features are designed to enhance your campaign strategies and improve customer engagement. Learn how you can take your marketing automation to the next level today.

Email 2 - Update Alert

Subject Line: Agentforce just got better!

Preheader: Explore the latest customization updates to boost your campaigns.

Body Copy:

Describe your task or ask a question...



Refine the drafted campaign

1 Enable Agentforce

2 Authorize Agentforce

3 Prompt Campaign

Agentforce Builder

Agentforce (Default)

Version 1 (Active) ▾

Settings

Help ▾

Topics

Data

Context

Language

Events

Checklist

Agent Response

</> 👁️ ⚡ Suggest Improvement

```
1 {  
2   "message": "Can I proceed with saving the campaign with all messages as emails?",  
3   "data": [  
4     {  
5       "message": "The campaign has been successfully created and saved with all messages as  
6         emails. How else can I assist you?"  
7     }  
8   ]  
9 }
```

Action Launched: Marketing Cloud: Save Campaign (SaveCampaign)

🕒 9.54 sec

This action saves the campaign and its draft components.

Input

```
{  
  "campaignMessages": "{\n  \"messages\": [\n    {\n      \"name\":  
      \"email_message_1_customization_intro\",\n      \"label\": \"Email 1 - Customization  
      Introduction\"  
    },  
    {\n      \"name\": \"Email 2 - Customization  
      Introduction\",  
      \"label\": \"Email 2 - Customization  
      Introduction\"  
    }  
  ],  
  \"apiName\": \"Campaign\",  
  \"label\": \"Campaign\"  
}
```

Output

```
{  
  "campaign": {  
    "sObjectInfo": {  
      "apiName": "Campaign",  
      "label": "Campaign"  
    }  
  }  
}
```

⚡ Reasoning: Action Selection

🕒 2.23 sec

> Prompt Used

Agent Response

</> 👁️ ⚡ Suggest Improvement

```
1 {  
2   "message": "The campaign has been successfully created and saved with all messages as  
3   emails. How else can I assist you?"  
4   "data": [  
5     {  
6       "message": "to enhance your campaign performance. Learn more about  
7         these features and how they can benefit your business."  
8     }  
9   ]  
10 }
```

Conversation Preview

👁️ ↻

to enhance your campaign performance. Learn more about these features and how they can benefit your business.

Email 4 - Reminder

Subject Line: Don't miss out on Agentforce's new updates!
Preheader: Enhance your campaigns today.

Body Copy:
Don't miss out on Agentforce's new updates! Enhance your campaigns today. Learn more: [link]

✓ Confirmed

👍 🗨️

🤖 The campaign has been successfully created and saved with all messages as emails. How else can I assist you?

🎯 Agentforce Campaign Update Promotion

Brief ID
[Agentforce Campaign Update Promotion](#)

👍 🗨️ 📄

Recommendations

➤ Save the campaign with all emails

➤ Create a draft campaign with all emails

➤ Summarize the campaign details

Describe your task or ask a question... 🔍



Save the campaign

**Thank
you!**

