What's in this guide?

Introduction
What is Agentforce Marketing?

Agentforce Marketing 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.

Agentforce Marketing 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 Agentforce Marketing.

01

What can you do with Agentforce Marketing

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

Optimize Journeys with Agentforce: 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.

Connect Journeys together with Flow: 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 Agentforce Sales, Agentforce Service, Agentforce Marketing, Agentforce Commerce, Data 360, and your external systems.

Centralize your Campaign Operations and Analytics: Agentforce Marketing 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.

Unified Campaign Reporting: The unified reporting tools in Agentforce Marketing 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 360, 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: Agentforce Marketing for Engagement includes Digital Wallet, which gives you insight into message usage by day, channel, and Marketing Cloud Engagement business unit. For simplified billing, all messages that you send consume Salesforce Message Credits.

02

Define your strategy.

The evolution to Agentic Marketing 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, this moment encourages a fundamental reassessment of your data, processes, and campaigns.

Agentforce Marketing 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. Agentforce Marketing 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: Utilizing 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. Agentforce Marketing is about adding what's next to what's already working.

Ask yourself the following questions to help define your strategic direction:

Customer Experience & 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 Agentforce Marketing 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 360 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 Agentforce Marketing datasets provide deeper cross-channel insights into campaign performance?

03

Usage guidance

Email

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, Agentforce Marketing enhances these capabilities by allowing you to orchestrate your MCE emails and journeys using Flow Builder. This enables you to dynamically trigger existing MCE emails from Flow, route individuals across multiple MCE journeys, and utilize advanced functionalities Agentic Journey Decisioning. While hybrid sending with shared sender domains or IP addresses between MCE and Agentforce Marketing is not yet fully supported, future enhancements are planned to streamline this experience.

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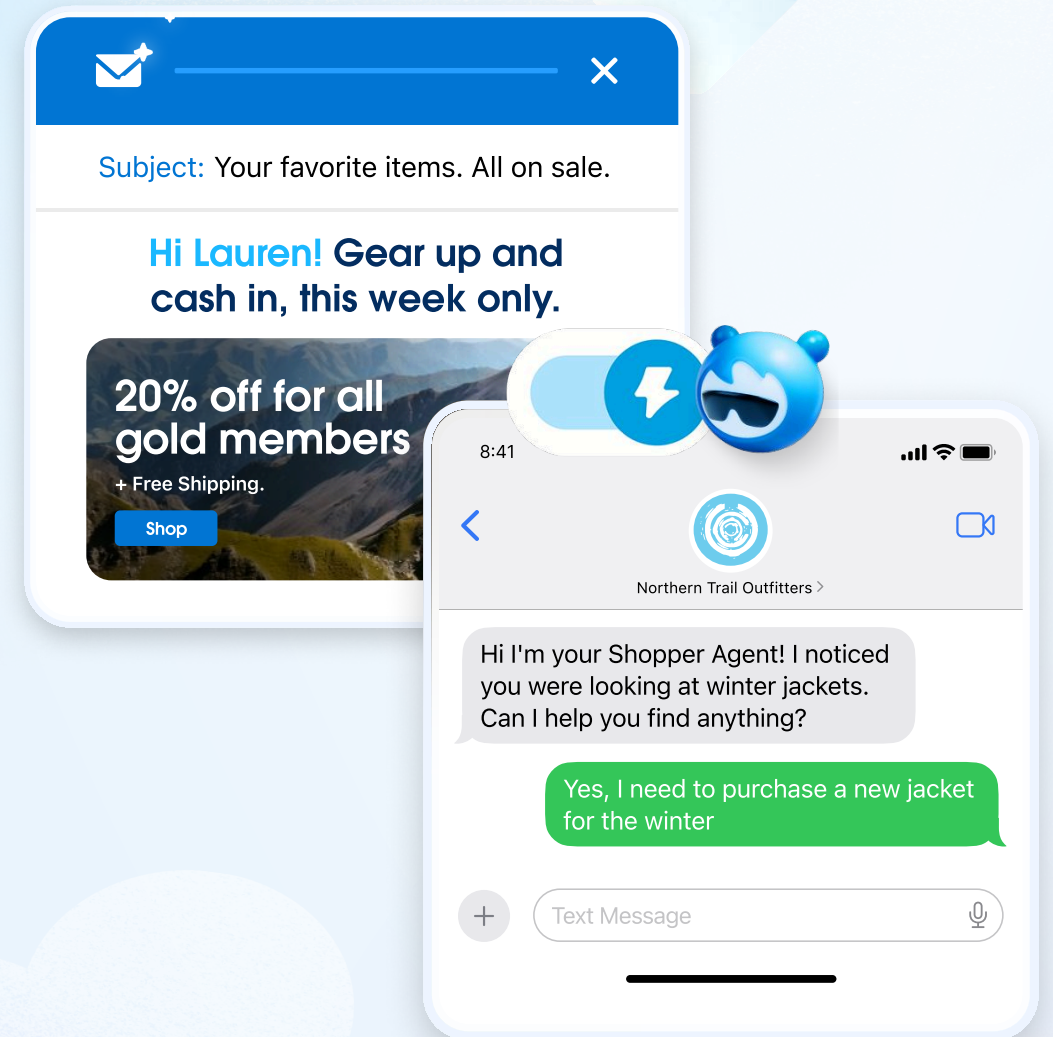
Usage guidance

Journey Orchestration

Journey Builder will continue to be your foundational tool for orchestrating robust, multi-step, cross-channel customer campaigns. If you are 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 is 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 to your campaign strategy that allows you to connect your traditional marketing campaigns to other actions across your Salesforce ecosystem like Sales, Service, and Commerce. Consider using 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. Flow also enables Agentic Journey Decisioning, which autonomously determines the "next best journey" for each individual and dynamically tailors content at scale based on behavior and business goals. Furthermore, Flow enables two-way conversational engagement via SMS and WhatsApp, providing interactive dialogue with customers and efficient hand-offs to service when needed.

In summary, use Journey Builder for what it does best: orchestrating multi-step, multi-channel customer journeys within Marketing Cloud. Flow Builder is your tool for more advanced, intelligent automation and cross-departmental workflows that might have been previously difficult or impossible to automate, connecting your marketing efforts with broader business processes and real-time data from Data 360. This synergistic approach allows you to keep your existing investments in Journey Builder while adding powerful next-generation capabilities to elevate your customer experiences.

03

Usage guidance

SMS

For Marketing Cloud Engagement customers who are currently using SMS: 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 Engagement channels, Journey Builder remains the appropriate tool. Hybrid sending on a common sender code across both Engagement and Agentforce Marketing is not yet supported, so we suggest maintaining your current SMS operations within Engagement to ensure seamless continuity for these established efforts.

For Marketing Cloud Engagement customers who are not yet using SMS: It is highly recommended to set up your new shortcode directly in Agentforce Marketing to utilize Flow and Agentforce. This allows you to immediately leverage powerful two-way conversational messaging and AI-powered automation features, which are not available in traditional Marketing Cloud Engagement. Two-way messaging allows you to engage in real-time, interactive dialogues with your customers, offer automated responses, provide product information, and even facilitate seamless hand-offs to your service team, all within a single SMS number.

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 Agentforce Marketing. 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 Agentforce Marketing

Here's how to get started connecting your Marketing Cloud Engagement instance to Agentforce Marketing.

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 360 tenant is necessary, with limited setup as Data 360 as the connective fabric for these new features. This can be an existing Data 360 once or a new one, and including Salesforce Foundations is recommended to provide baseline Data 360s.

    c. Admin users for both your MCE account and your Salesforce Platform (Agentforce Marketing) are needed for setup. Identity licenses are sufficient for Agentforce Marketing users.

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

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

Ensure Message Credits are in place

    a. All messaging consumption will be managed through Salesforce Message Credits (for Email, SMS, WhatsApp, Mobile App) instead of "Super Messages." Salesforce Message Credits is a shared entitlement that is fungible across sends in both MCE and the Agentforce Marketing 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 Agentforce Marketing

Phase 2: Enable features and start configuring details.

Before you start:

    a. Data 360 is the connective fabric linking your existing MCE data with next-generation features.

    b. If you're a new Data 360 customer, this involves activating Data 360 in the Salesforce Platform environment, which may include installing Data 360 and deploying data streams (out of the box [OOTB] or prepackaged) for   channel bundles.

    c. For existing Data 360 customers who have already integrated MCE data, some initial connection steps may be skipped.

Configure your Agentforce Marketing organization

    a. You'll need to map your MCE business units to Data Spaces within Data 360. 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 Agentforce Marketing without manual data modeling.

    c. (Optional step) Import your Data Extensions from MCE to Data 360, allowing you to reuse the existing custom data.t

Connecting Marketing Cloud Engagement to Data 360?

Here's how.

Watch demo

04

How to get started with Agentforce Marketing

Set up users and permissions for Agentforce Marketing

a. Administrators will need to create new users (with Identity licenses) in Agentforce Marketing and assign them appropriate Marketing Cloud permission sets, such as "Marketing Cloud Admin" or "Marketing Cloud Manager."

b. 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

a. Follow the guided steps in the Marketing Setup Assistant within Agentforce Marketing to finalize basic settings and turn on the OOTB Analytics dashboards.

Configure Identity Resolution and Data Graph (if applicable)

a. For advanced Flow functionality, Identity Resolution and Data Graph are generally prerequisites.

b. If you aren't an existing Data 360 customer, create an Identity Resolution Ruleset.

Install Marketing Performance features

a. Within Agentforce Marketing Setup, go to "Marketing Performance" and click "Install" to deploy these features, which run in   the background.

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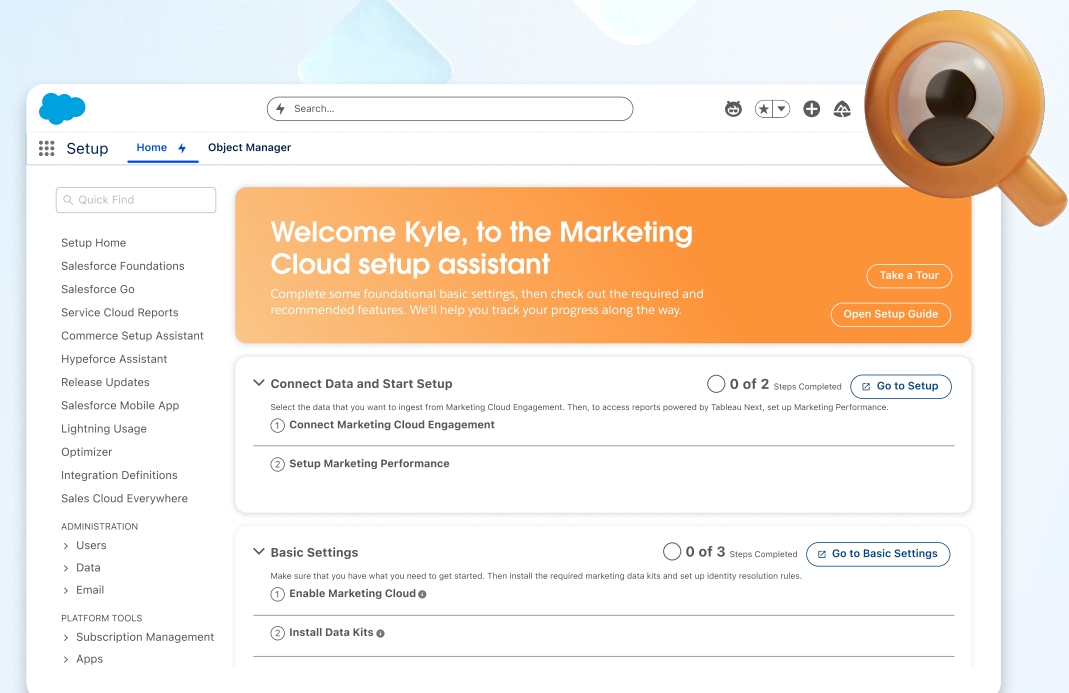
How to get started with Agentforce Marketing

Phase 3: Begin leveraging Agentforce Marketing 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.

    a. Find and open the Your Account app.

    b. Click the Consumption Cards tab.

Want to monitor messaging consumption in near real-time?
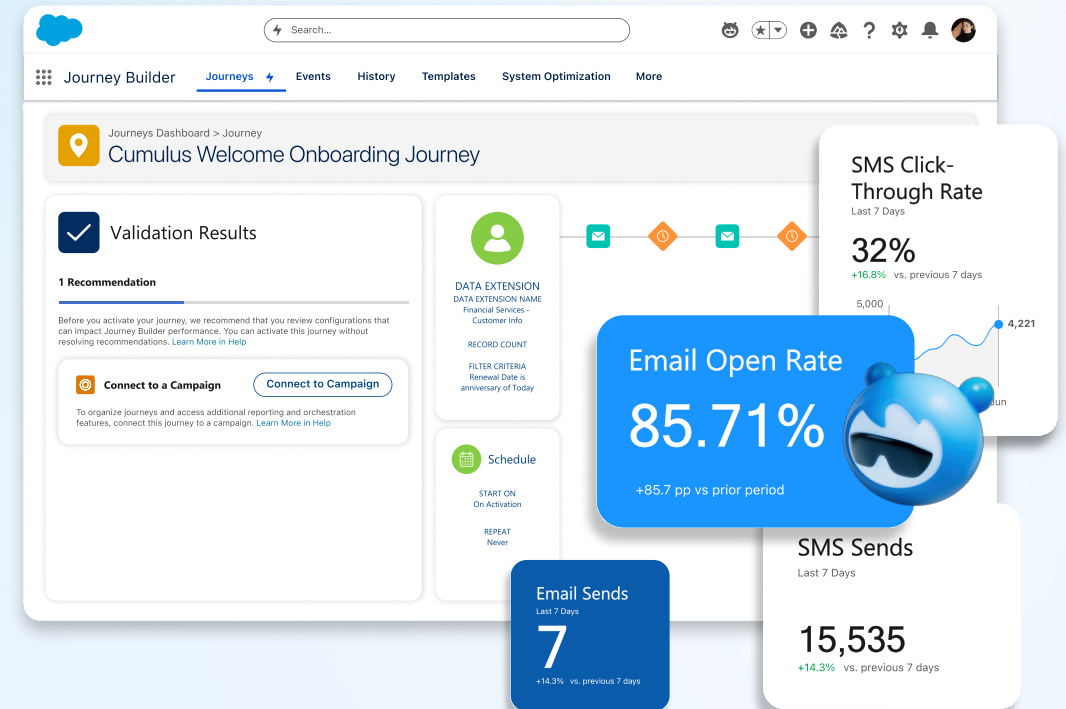
Here's how.

[Watch demo]

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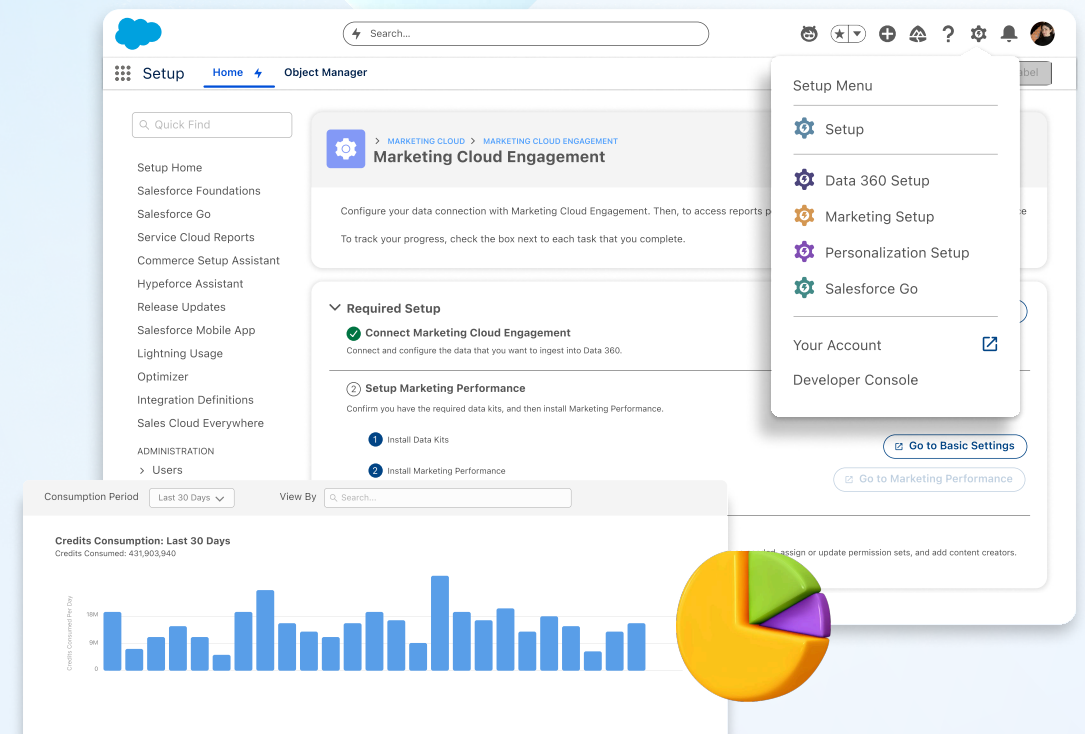
How to get started with Agentforce Marketing

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 Agentforce Marketing 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.

Want a single source of truth for campaign operations and reporting?

Here's how.

Watch demo

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How to get started with Agentforce Marketing

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 360 segments to Journey Builder.

   ii. Use "Send to Journey" within Flow to link multiple journeys together.

Want to orchestrate journeys together without code?

Here's how.

Watch demo

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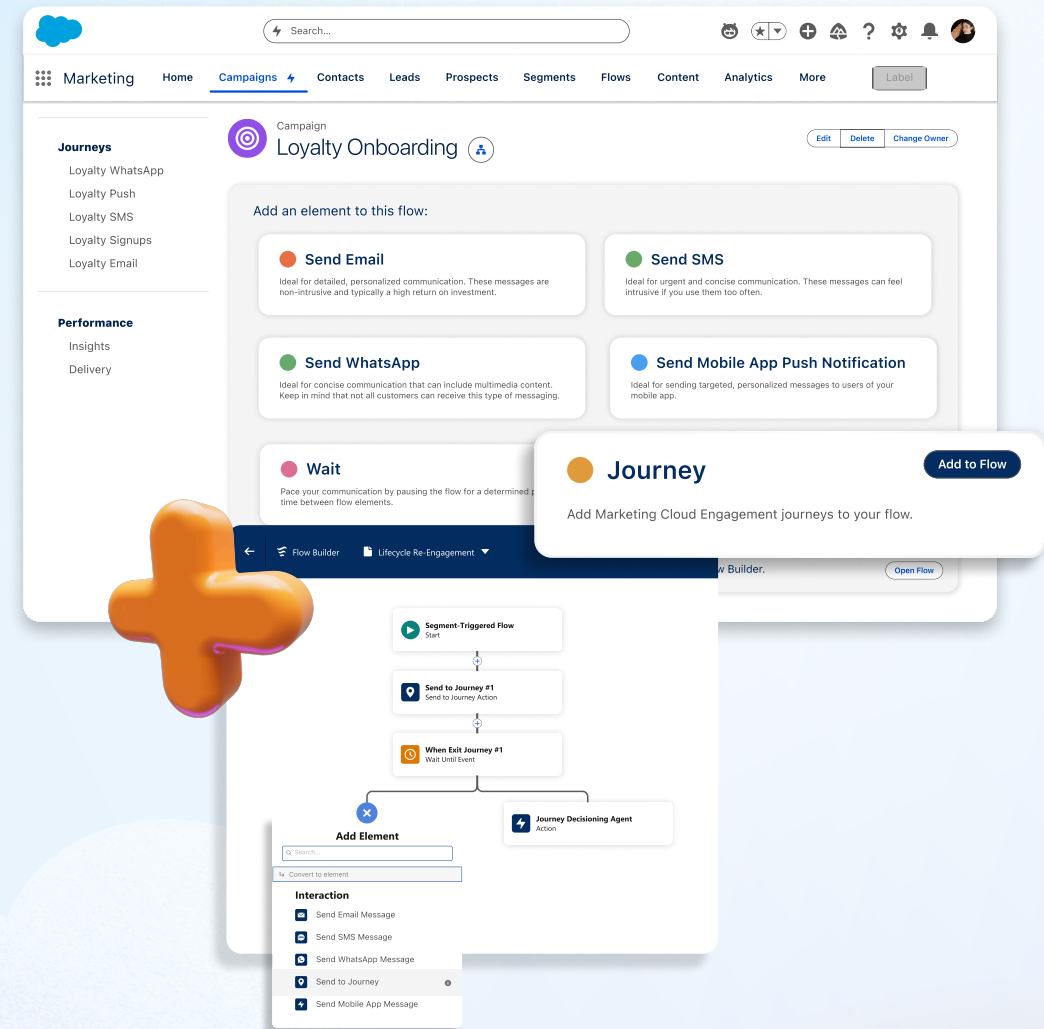
How to get started with Agentforce Marketing

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.
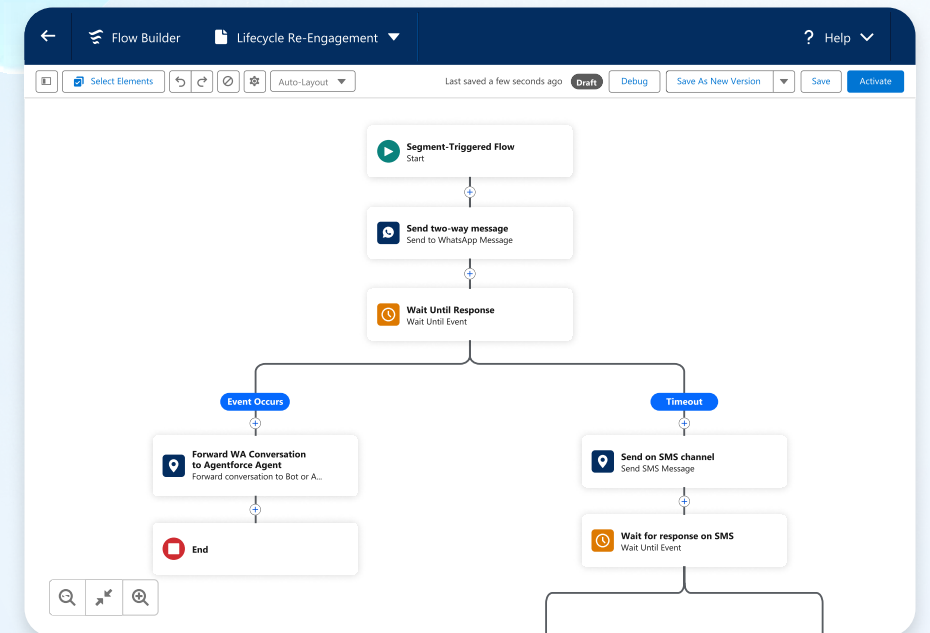
a. First, you need to set up your new agent. Go to setup in your Salesforce Org, and type in "Agentforce Agents."

b. Next, click "New Agent," and you'll see there's a template created, titled "Journey Decisioning Agent."

c. Then you will walk through the steps to set up your agent, including the template, topics, actions, and instructions.

d. 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).

e. Launch your use case.

f. Add your new journey decisioning agent to your flow.

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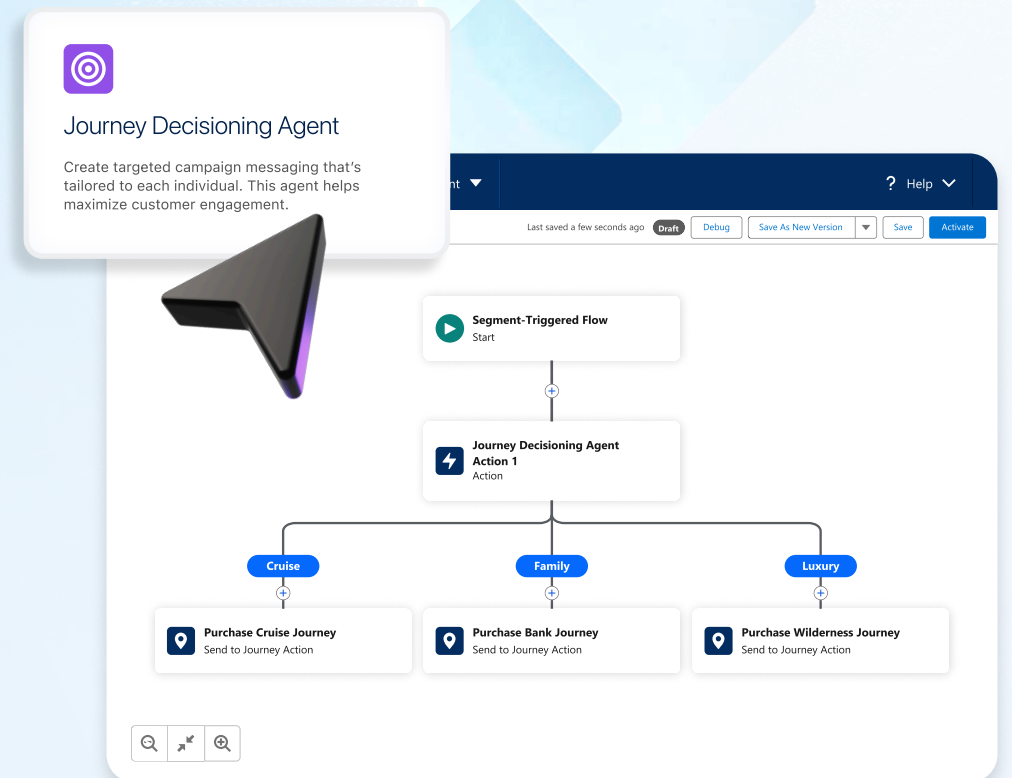
How to get started with Agentforce Marketing

Adopt new channels for conversational engagement

If you're interested in new channels, consider net-new SMS or WhatsApp adoption in Agentforce Marketing. Agentforce Marketing 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
	Leverage existing Marketing Cloud Engagement (MCE) assets. Perform basic setup, and use immediate-value features to get started quickly and efficiently with minimal configuration.	Expand on initial adoption by leveraging richer reporting, enhanced Flow experiences, and more sophisticated Agentforce-driven decisions. This stage involves a targeted effort across one MCE business unit.	Expand into new channels and fully leverage advanced Agentforce and Flow capabilities for highly personalized and integrated customer experiences across the entire business ecosystem.
Reporting & Analytics	**Digital Wallet:** 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. **Enhanced SMS dashboards:** Interactive dashboards for SMS performance and deliverability.	**Richer subscriber-level reporting:** Access more detailed reporting and segmentation for all channels, including WhatsApp and in-app messages. **Marketing performance and campaign dashboards:** 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.	**Custom dashboards:** Create custom dashboards and formulas based on your data to gain deeper insights into campaign performance.
Flow	**Send MCE emails from Flow:** Leverage events to trigger emails, surveys, and reengagement campaigns without the connector. **Connect journeys via Flow:** Dynamically route individuals across multiple MCE journeys using out-of-the-box events, segments, or data-driven decisions.	**Cross-departmental workflows:** Implement more advanced workflows that span across departments, optimizing handoffs and enhancing the entire customer lifecycle.	**Two-way conversational engagement:** 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.
Agentforce	**Agentforce for campaign insights:** Gain early insights and recommendations for your marketing campaigns using Agentforce capabilities. This helps in supercharging existing campaigns with AI-driven intelligence.	**Agentic journey decisioning:** 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.	**Agentforce-powered campaigns, segments, and journeys:** 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.
Addit. Use Cases	**No-code segmentation:** 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. These segments can then be directly activated in Flow to trigger existing customer journeys or MCE content.		

Additional Resources

Agentforce Marketing

Learning Map

Unlock the AI Evolution with Agentforce Marketing

Salesforce help article detailing the possibilities of Agentforce Marketing 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

Frequently Asked Questions

Do I need to fully implement Data 360 to benefit from Engagement and Agentforce Marketing?

While Data 360 is a prerequisite for Engagement+, a full scale implementation is not required. Marketers will quickly benefit from several use cases including consumption monitoring with Digital Wallet, leveraging Journey Builder journeys in flow, and unified campaign reporting without a full implementation.

Is Salesforce announcing an end-of-life for Marketing Cloud Engagement?

There are currently no plans to end-of-life Marketing Cloud Engagement. We will continue to innovate and support Marketing Cloud Engagement and Journey Builder. Marketing Cloud Engagement and Agentforce Marketing have a rich roadmap of innovation for our customers - featuring agentic experiences, a common, more actionable dataset across Marketing, Sales, Service, & Commerce

Do I have to migrate my data, content, and journeys from MCE?

No. We are not encouraging any migration. Instead, the new capabilities unlocked by Marketing Cloud Engagement+ are complementary to your existing data, journeys, and content. Focus your efforts try new use cases, optimize processes, or up-level existing use cases.

How do users and login work for Marketing Cloud Engagement+?

Accessing the next generation marketing capabilities will require Core User licenses (Identity Licenses suffice). Admins can create these Users manually, or export from Engagement Setup and upload via Salesforce Data Loader for quick user creation in bulk. Admins will assign a Marketing Cloud permission set (Marketing Cloud Manager or Marketing Cloud Admin) to each User.