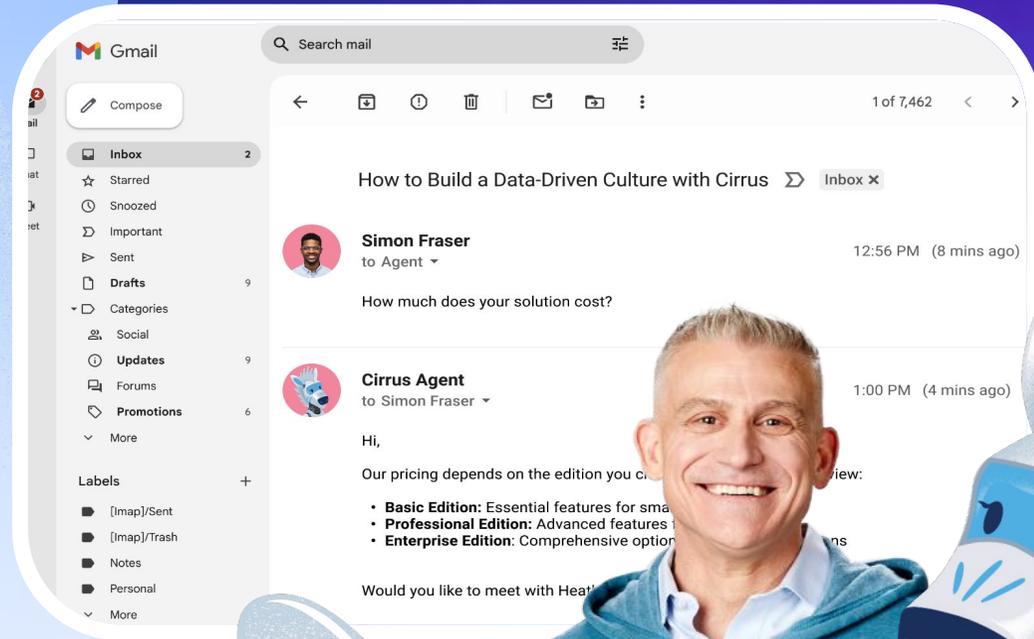




# Introducing Agentforce for Sales

## Account Management Implementation Guide

Last Updated: February 2026



# Accelerate Deals across the Account Lifecycle

## Embedded Account Research

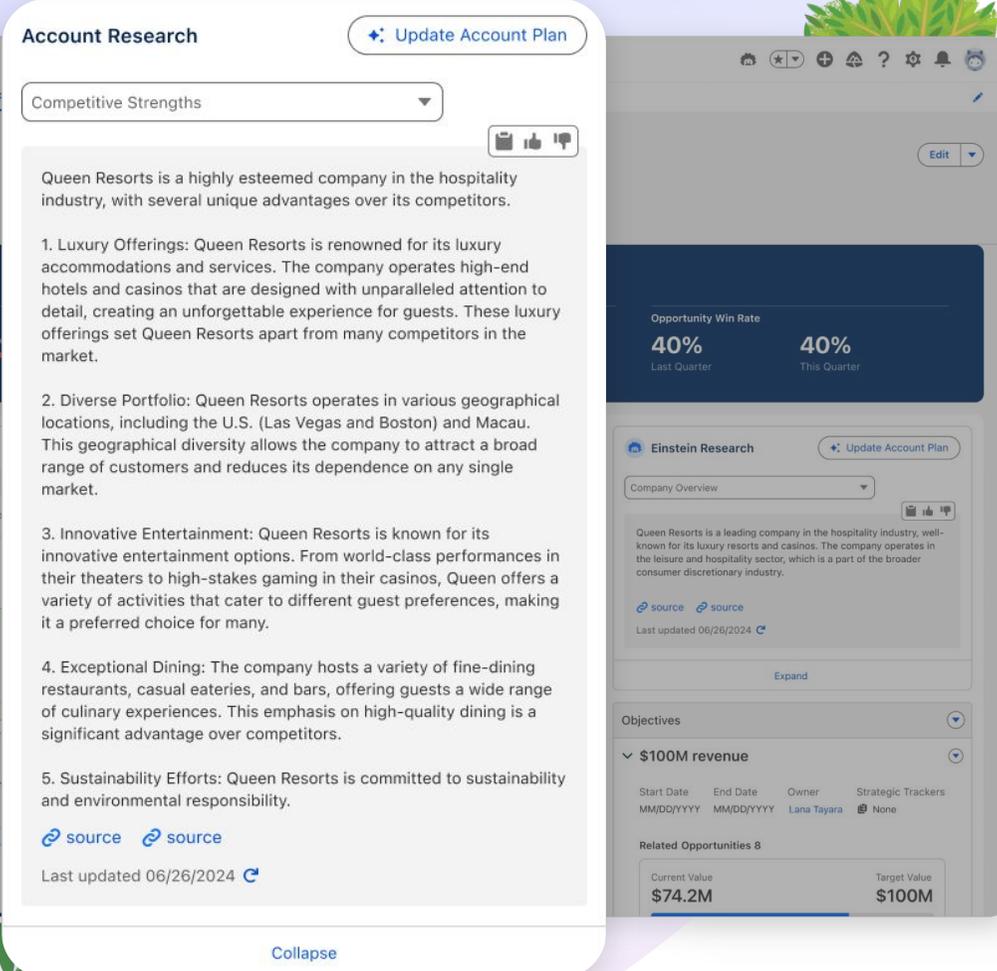
Surface company overviews, key performance indicators, competitive insights, and industry trends with a single click

## Real-Time Account Intelligence

Agentforce researches, synthesizes, and refreshes key insights in seconds, turning hours of manual prep into an instant, always-current view of every account

## Account Management Where You Work

Get instant POVs and meeting briefs in Lightning, mobile, Slack, and the Salesforce Chrome extension



**Account Research** [Update Account Plan](#)

Competitive Strengths

Queen Resorts is a highly esteemed company in the hospitality industry, with several unique advantages over its competitors.

- Luxury Offerings:** Queen Resorts is renowned for its luxury accommodations and services. The company operates high-end hotels and casinos that are designed with unparalleled attention to detail, creating an unforgettable experience for guests. These luxury offerings set Queen Resorts apart from many competitors in the market.
- Diverse Portfolio:** Queen Resorts operates in various geographical locations, including the U.S. (Las Vegas and Boston) and Macau. This geographical diversity allows the company to attract a broad range of customers and reduces its dependence on any single market.
- Innovative Entertainment:** Queen Resorts is known for its innovative entertainment options. From world-class performances in their theaters to high-stakes gaming in their casinos, Queen offers a variety of activities that cater to different guest preferences, making it a preferred choice for many.
- Exceptional Dining:** The company hosts a variety of fine-dining restaurants, casual eateries, and bars, offering guests a wide range of culinary experiences. This emphasis on high-quality dining is a significant advantage over competitors.
- Sustainability Efforts:** Queen Resorts is committed to sustainability and environmental responsibility.

[source](#) [source](#)

Last updated 06/26/2024

[Collapse](#)

---

**Einstein Research** [Update Account Plan](#)

Company Overview

Queen Resorts is a leading company in the hospitality industry, well-known for its luxury resorts and casinos. The company operates in the leisure and hospitality sector, which is a part of the broader consumer discretionary industry.

[source](#) [source](#)

Last updated 06/26/2024

[Expand](#)

Objectives

▼ **\$100M revenue**

Start Date	End Date	Owner	Strategic Trackers
MM/DD/YYYY	MM/DD/YYYY	Lana Tayara	None

Related Opportunities 8

Current Value	Target Value
\$74.2M	\$100M

# Research & Build Account Plans in Seconds



The screenshot displays the Salesforce Account Research interface. On the left, a sidebar shows the 'Queen Resorts Account Plan' with a status of 'Active' and a start date of '1/1/2024'. Below this, 'Account Metrics for Queen Resorts' is shown with a circular progress indicator at 60%. The main content area is titled 'Account Research' and features a dropdown menu for 'Competitive Strengths'. The research text is as follows:

Queen Resorts is a highly esteemed company in the hospitality industry, with several unique advantages over its competitors.

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At the bottom of the research panel, there are two 'source' links and a 'Last updated 06/26/2024' timestamp. A 'Collapse' button is located at the very bottom of the panel.

On the right side of the interface, a summary card shows the 'Opportunity Win Rate' as 40% for both the 'Last Quarter' and 'This Quarter'. Below this, an 'Einstein Research' section provides a 'Company Overview' for Queen Resorts, including a brief description, source links, and a 'Last updated 06/26/2024' timestamp. An 'Expand' button is visible below the overview. At the bottom right, an 'Objectives' section shows a goal for '\$100M revenue' with a table of metrics:

Start Date	End Date	Owner	Strategic Trackers
MM/DD/YYYY	MM/DD/YYYY	Lana Tayara	None

Below the table, 'Related Opportunities 8' are listed with a 'Current Value' of \$74.2M and a 'Target Value' of \$100M.

Embedded Account Research  
GA January '26

# Get Account Briefs Wherever You Work



### Account Plan

## Omega Inc. Account Plan FY25

Product Request | New Task | Vehicle Inspection

Account: [Omega Inc.](#) | Status: Active | Start Date: 1/1/2025 | End Date: 12/31/2025 | Account Plan Owner: [Catherine Smith](#)

### Account Metrics for Omega Inc.

Open Opportunities by Stage (5)

- 2 Discovery
- 1 Qualification
- 1 Proposal/Quote
- 1 Negotiation

View All Opportunities

Revenue: **\$631K** **\$0**  
Last Quarter | This Quarter

Opportunity Win Rate: **67%** **0%**  
Last Quarter | This Quarter

### Account Plan Information

Account Plan Name	Omega Inc. Account Plan FY25	Account	<a href="#">Omega Inc.</a>
Start Date	1/1/2025	End Date	12/31/2025
Account Vision	Our long-term vision for Omega, Inc. is to evolve from a key supplier of enterprise software solutions to a strategic innovation partner, deeply integrated into their core business processes. We aim to support their digital transformation by co-developing custom solutions that not only address their immediate operational challenges but also anticipate future market shifts, ultimately positioning us as an indispensable ally in their pursuit of market leadership within the renewable energy sector.	Notes	Scheduling roadmap sharing session with the customer first week of Nov
Status	Active		
Parent Account	<a href="#">Omega System</a>		

### Account Research

Research Area: Company Overview [Research](#)

Edited Sep 17, 2025 at 1:54 PM by Catherine Smith

**Omega Inc.** is a leading player in the renewable energy sector, with a diversified portfolio of wind and solar assets. The company's core business revolves around large-scale operations, allowing it to leverage economies of scale and secure long-term contracts with major utilities. Omega Inc. has a strong reputation fo...

[Expand](#)

[Add Results to Account Plan](#)

### Omega, Inc. Meeting Prep

Share | Star

## Omega, Inc. Meeting Prep

This tool uses generative AI, which can produce inaccurate or harmful responses. Review for accuracy and safety before using.

### Omega, Inc. Brief

Company Overview

Omega, Inc. is a prestigious Swiss luxury watchmaker headquartered in Biel/Bienne, Switzerland. The company has been a customer since January 31, 2025. Omega's annual revenue is approximately \$87 million, and it employs around 14,800 individuals.

### Recent Conversations

Recent conversations have highlighted key challenges and requests from Omega, Inc.

- Date:** March 15, 2025  
**Contact:** John Smith  
**Quote:** "We need to ensure our digital marketing strategy aligns with our growth objectives."
- Date:** April 5, 2025  
**Contact:** Sarah Johnson  
**Quote:** "Can you provide insights on how we can better engage with younger consumers?"

### Account Plan Vision & Objectives

The vision is to be a trusted partner in helping this account.

Agentic Account Management GA January '26

# Collaborate with Agentforce and your account team all in one workspace



Account Insights workspace for Acme Corp. The interface shows a sidebar with navigation options like Home, Contacts, Sales, Marketing, Service, Commerce, Gen Canvas, Your Account, and More. The main content area is divided into three columns. The left column contains an 'Account Brief' with sections for 'Company Overview and Profile', 'Strategic Priorities and KPIs', and 'Competitive Landscape, Strengths, and Weaknesses'. The middle column features a '3-Step Outreach Strat...' with numbered steps: 1. Research, 2. Draft, and 3. Schedule. The right column lists key contacts: 1. Liam Chen (VP of Product) and 2. Sarah Lee (IT Director). Below the contacts is a 'Key Contacts' section with a list of contact actions like 'Move to Top', 'Move to Bottom', 'Rename', and 'Remove'. At the bottom right, there are 'Recommendations' and a text input field for tasks or questions.

Account IQ  
Pilot January '26

To learn more about pilots, contact your Account Executive

# How Agentforce Helps Grow Accounts



Starts with...

Synthesizes Data

Generates Research

Outcome

Seller Requests Account Research

Agentforce gathers data from across your Customer 360

CRM Records

Conversations

Web Search

Sales Collateral

Agent Synthesizes Data

Queen Resorts Account Plan

Plan Status: Active | Start Date: 1/12/2024 | End Date: 12/20/2024

Account Metrics for Queen Resorts

- Open Opportunities: 17
- Discovery Call with Omega
- Meeting Playback

Transcript Summary More

Ron Reid 00:41

We've been using Genius Solutions for 2 years now it works, but I feel like we're still missing some features, the other company is doing a bit of research on our side, I haven't had a call yet, from what I see on their website, it seems similar to you guys got some solutions.

Notes My Notes

- Haven Note: 8/9/2025, 4:12 PM by Sydney Halden. Customer Impression Sarah Jones felt positively about the service offered by Welo. They appreciated the quick response from Sydney...
- Morphon Brothers Note: 6/9/2025, 4:11 PM by Sydney Halden. Customer Impression Jason Green felt positive about the interaction with Sydney Halden and appreciated the quick response and setup...

Agent Produces a Research Brief

Omega, Inc. Meeting Prep

This tool uses generative AI, which can produce inaccurate or harmful responses. Review for accuracy and safety before using.

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**Account Plan Vision & Objectives**  
The vision is to be a trusted partner in helping Omega, Inc. achieve their business goals.

Seller Preps for Calls & Creates Account Plans in Minutes

Queen Resorts Account Plan

Account Metrics for Queen Resorts

- Open Opportunities: 17
- Discovery Call with Omega
- Meeting Playback

Omega, Inc. Meeting Prep

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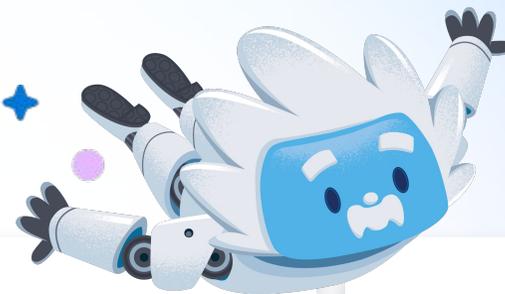
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**Account Plan Vision & Objectives**  
The vision is to be a trusted partner in helping Omega, Inc. achieve their business goals.

Research in Lightning, Slack, mobile & Chrome Extension

# The 5 attributes of a sales agent



## Role

What job should they do



## Data

What knowledge can they access



## Actions

What capabilities do they have



## Guardrails

What shouldn't they do



## Channel

Where do they work

**Trust & Security**



# The 5 attributes of account management



## Role

Deep sales research



## Data

CRM, Web, Conversations, Sales Collateral



## Actions

Update Account Plan, Draft Email, Share Research



## Guardrails

User instructions, data access, Trust Layer



## Channel

Lightning, Slack, mobile, Chrome Extension

**Trust & Security**





# Demo

## Account Management





# Account Management

## Out of the Box Topics & Actions

Topic	Description	Actions
<b>Sales Research</b>	Researches and synthesizes information about an account or lead based on user input	<ul style="list-style-type: none"><li>● Get Conversation Intelligence</li><li>● Get Related Emails</li><li>● Search the Web</li><li>● Get Activities Timeline</li><li>● Get Related Notes</li><li>● Get Account and Account Plan</li><li>● Identify Record by Name</li><li>● Query Records</li><li>● Answer Questions with Knowledge</li><li>● Get Record Research</li><li>● Get Activity Details</li><li>● Get Record Details</li></ul>
<b>Record Management</b>	Assists users with identifying records to update and with performing create/update operations	<ul style="list-style-type: none"><li>● Extract Fields and Values</li><li>● Identify Record by Name</li><li>● Update Record</li><li>● Update AI-Generated Action</li></ul>
<b>Slack Operations</b>	Helps users search Slack messages and channels	<ul style="list-style-type: none"><li>● Update a Slack Canvas</li><li>● Look Up a Salesforce Channel in Slack</li><li>● Send Message to a Slack Channel</li><li>● Create a Slack Canvas</li><li>● Summarize a Slack Channel</li><li>● Share a Slack Canvas</li></ul>



# Before You Get Started

## Account Management



# Identifying Use Case Fit

## Account Management is a great fit if you...

- ✓ Use the Account object in Salesforce
- ✓ Capture account interactions in Salesforce, such as calls, meetings, emails and notes
- ✓ Have sellers who manage 10 or more accounts, and need help getting up to speed on their customers' needs
- ✓ Have sellers who work in Lightning, Slack, or the Salesforce mobile app

# Technology and Data Considerations



		Required	Highly Suggested
<b>Objects</b>	Do you currently use the <b>Account object</b> ?	✓	
<b>Data Sources</b>	Do you record and store sales calls and meetings digitally, correspond with prospects via email, and capture seller notes?	✓	
	For out of the box use - do you currently use or do you plan to use <b>Einstein Activity Capture</b> ?		✓
	For out of the box use - do you currently use or do you plan to use <b>Einstein Conversation Insights</b> ?		✓
	For out of the box use - do you currently use or are you willing to use <b>Salesforce Notes</b> ?		✓
	For out of the box use - are you willing to enable <b>Data Cloud</b> ? (Note: Data Cloud gives access to web search and Agent Data Library)	✓	
<b>Product Supporting Features</b>	Do you currently use Account Plans?		✓

# Account Management Required & Suggested Features

Feature	Required	SKU Name	Account Management Uses the Feature
<a href="#">Einstein Generative AI</a>	✓	Salesforce Foundations	Unlocks generative AI and the Agentforce platform
Agentforce Employee Agent (Sales Management Template)	✓	Agentforce for Sales or Agentforce 1 Sales Edition	Allows Agentforce to research accounts from a variety of data sources, in order to generate research briefs
Data Cloud	✓	Salesforce Foundations	Allows Agentforce to connect to public web and assets that you store in an Agent Data Library
<b>Also required: At least one of the data sources below, or BYO data</b>			
<a href="#">Salesforce Notes</a>	Recommended	All Editions	Allows sellers to manually capture notes on opportunity records to provide more context for the agent
<a href="#">Einstein Conversation Insights (ECI)</a>	Recommended	Sales Cloud EE includes 10 Licenses UE and above included	Captures transcripts from video and voice calls
<a href="#">Einstein Activity Capture (EAC)</a>	Recommended	Sales Cloud EE and above	Ensures sales emails are automatically captured in Salesforce and associated with the correct CRM records
<a href="#">Account Plans</a>	Recommended	Sales Cloud EE and above	Uses account plans as grounding data for creating account briefs, and can update account plans from public web research

# Agentforce for Sales Account Management Permissions

	Permission Sets	Description
<b>REQUIRED PERMISSION SET FOR ALL USERS</b>	<ul style="list-style-type: none"><li>UnmeteredUserBasedAI</li></ul>	Assign this permission to the all human users who will interact with agents to avoid triggering usage-based billing. Without it, their AI activity will incur charges.
<b>Account Management Human Users</b>	<ul style="list-style-type: none"><li>Sales Management User (Permission Set Group)</li></ul>	Contains the permission sets required to use Agentforce Account Management and Agentforce Pipeline Management (features must be enabled separately).
<b>Agent User</b>	<ul style="list-style-type: none"><li>Sales Management Agent (Permission Set Group)</li></ul>	Assign these permission sets to the SalesManagementAgent User to allow the agent to research accounts and suggest updates to opportunities (features must be enabled separately).
<b>Salesforce Admin</b>	<ul style="list-style-type: none"><li>Agentforce Default Admin</li><li>Prompt Template Manager</li><li>Data Cloud Architect</li></ul>	Allows the admin to manage and configure the agent. Data Cloud permissions are required in order to create web retrievers and/or Agent Data Libraries.

# Gathering Requirements



## Ensure Your Organization is Agent Ready and Lay the Foundation for Successful Implementation

### Plan for Success

- ❑ Define the data sources you need to research accounts, and note if they are in Salesforce or are external
- ❑ Gather sales collateral, such as product and competitive information, that helps the agent understand your sales process
- ❑ Determine where sellers will interact with the agent, such as Lightning, mobile or Slack



# Create Your Agent

Account Management



# Account Management Set Up Overview

## 1 Enable Agentforce for Sales

Enable required features and complete prerequisite setup steps

## 2 Create and Configure

Configure Agentforce for Sales Account Management

## 3 Test and Preview

Test and preview in Agent Builder before activation

## 4 Runtime and Monitoring

Monitor field updates live in production

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring

Salesforce Go > Einstein Generative AI

# Einstein Generative AI

Give your users capabilities powered by Einstein generative AI that help them save time, create personalized experiences, and meet their goals.

✓ 1 of 1 Required steps completed [Refresh](#)

## Turn On Einstein Generative AI

On

[See Considerations](#) [Setup Help](#)

### Set Up the Basics

**Manage Configuration** Optional

[Go to Setup](#)

Set up Data Cloud. Turn on Einstein Trust Layer and Einstein data collection and storage. To complete each step, go to the respective setup pages.

### Add Quantity

#### Contact us to get this feature

We can't show purchase options right now.  
Please [contact us](#) instead.

## Get to Know Einstein Generative AI



[See How It Works](#)

### Feature Sets

[Forecast with Confidence](#)

[Keep Deals on Track](#)

[Boost Seller Productivity with AI](#)

[Nurture Sales Leads](#)

[Connect with Sales Prospects and Customers](#)

[Automate & Guide Selling](#)

### Learn on Trailhead

[Generative AI Basics](#)

[AI Strategy](#)

[AI + Data: Project Planning](#)



## Turn on Einstein Generative AI

In Setup, search for Salesforce Go

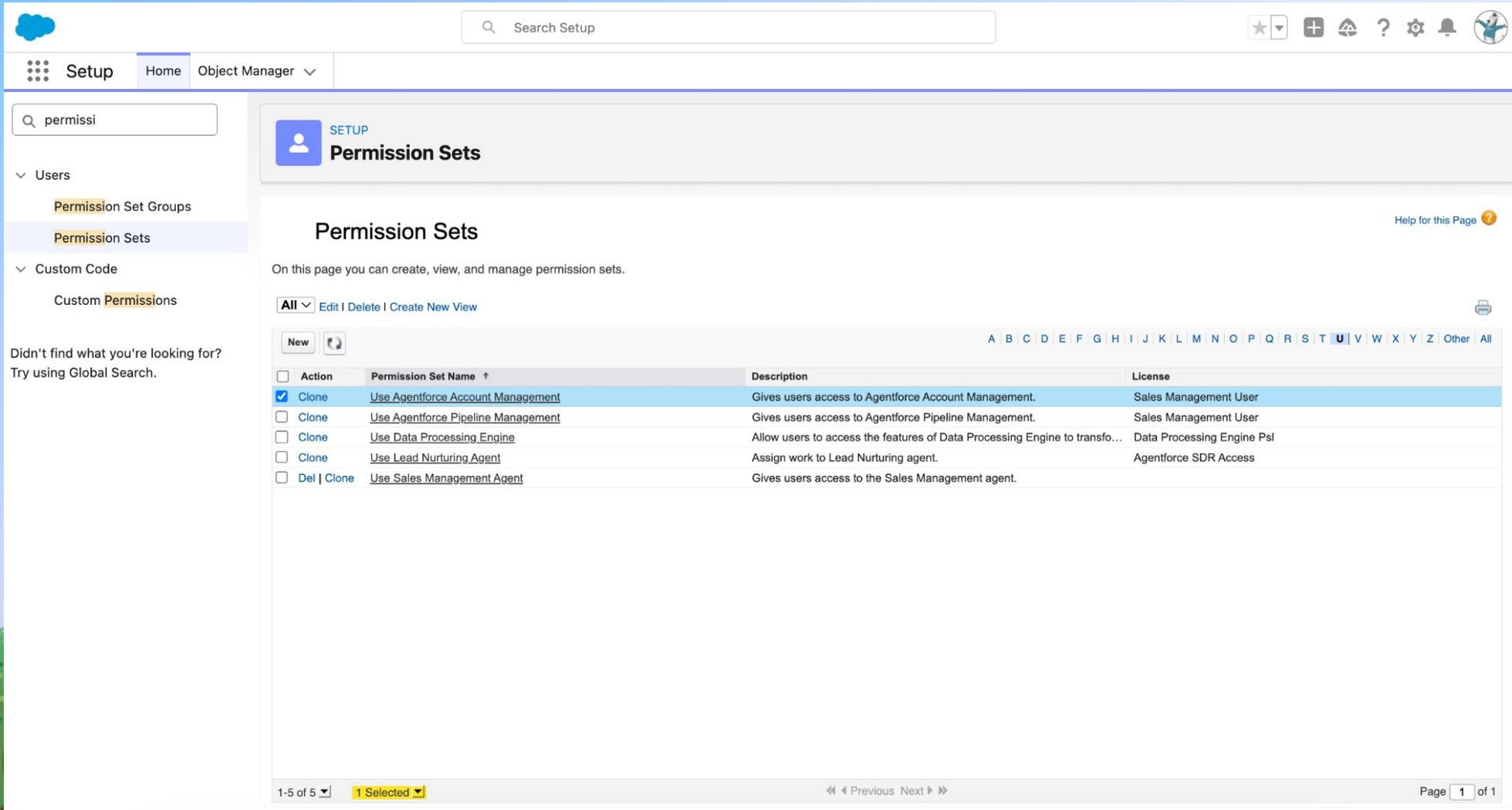
Within Salesforce Go, search for Einstein Generative AI and enable it

# 1 Enable Agentforce for Sales

# 2 Create and Configure

# 3 Test and Preview

# 4 Runtime & Monitoring



The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present with the text 'Search Setup'. The left sidebar shows a search for 'permissi' and a list of categories: Users, Permission Set Groups, Permission Sets (selected), and Custom Code. The main content area is titled 'Permission Sets' and includes a sub-header 'SETUP Permission Sets'. Below this, there is a description: 'On this page you can create, view, and manage permission sets.' A filter dropdown is set to 'All', and there are links for 'Edit', 'Delete', and 'Create New View'. A table lists five permission sets, with the first one, 'Use Agentforce Account Management', selected. The table has columns for Action, Permission Set Name, Description, and License. At the bottom, there is a pagination bar showing '1-5 of 5' items, '1 Selected', and 'Page 1 of 1'.

Action	Permission Set Name	Description	License
<input checked="" type="checkbox"/>	<a href="#">Use Agentforce Account Management</a>	Gives users access to Agentforce Account Management.	Sales Management User
<input type="checkbox"/>	<a href="#">Use Agentforce Pipeline Management</a>	Gives users access to Agentforce Pipeline Management.	Sales Management User
<input type="checkbox"/>	<a href="#">Use Data Processing Engine</a>	Allow users to access the features of Data Processing Engine to transfo...	Data Processing Engine Psi
<input type="checkbox"/>	<a href="#">Use Lead Nurturing Agent</a>	Assign work to Lead Nurturing agent.	Agentforce SDR Access
<input type="checkbox"/>	<a href="#">Use Sales Management Agent</a>	Gives users access to the Sales Management agent.	



## Assign Admin Permission

Make sure your admin user has the Use Agentforce Account Management permission set (required to see the agent's topics and actions)

The screenshot shows the Salesforce Setup interface. At the top, there is a search bar with the text "Search Setup". Below the search bar, there are navigation tabs: "Setup", "Home", and "Object Manager". The "Setup" tab is active. On the left side, there is a search bar with the text "account m" and a list of search results under "Agentforce for Sales", including "Agentforce Account Management". Below the search results, there is a message: "Didn't find what you're looking for? Try using Global Search." The main content area is divided into two sections. The first section is titled "Turn On Agentforce" and has a green "On" toggle. Below this section, there is a link "Turn On Agentforce Studio" with a green checkmark and an information icon, and a "Review" link with an external link icon. The second section is titled "Start with an Agent Template" and contains a description: "Agentforce includes prebuilt templates with specialized skills based on the agent's primary job. Select an option below to get started. After enabling, complete a short setup process before building your agent." Below this section, there is a section titled "Account Management" with a blue "See Considerations" link, a blue "Setup Help" link, and a blue "On" toggle. Below the "Account Management" section, there is a progress indicator "5 of 8 Steps Completed" and a description: "Grow and retain customers with automated account research and suggested strategic actions." Below this description, there are three links: "Turn On Account Intelligence View", "Turn On Account Plans", and "Turn On Enhanced Email", each with a green checkmark and an information icon, and a "Review" link with an external link icon.



## Turn on Account Management

In Setup, search for Agentforce Account Management

Enable the feature.

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup" and navigation icons. Below that, the "Setup" menu is open, showing "Home" and "Object Manager". A search box on the left contains "account m". Under "Agentforce for Sales", "Agentforce Account Management" is selected. The main content area is titled "Account Management" and shows a progress indicator "8 of 8 Steps Completed". A list of steps is displayed, each with a green checkmark and an information icon. The steps are: "Turn On Account Intelligence View", "Turn On Account Plans", "Turn On Enhanced Email", "Turn On Notes", "Assign Required Permissions to Admin", "Turn On Sales Account Research", "Finish Configuring Account Plans", and "Set Up Einstein Conversation Insights". The "Turn On Sales Account Research" step is highlighted with a blue toggle switch labeled "Active".



## Turn on Sales Account Research

Then, for richer data, optionally enable Einstein Conversation Insights or Einstein Activity Capture.

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring

Lightning App Builder Pages Account Plan Record Page ? Help

Desktop Shrink To View Analyze Activation... Save

Components Fields

resea

Standard (1)

Record Research

Custom (0)

Custom - Managed (0)

Account Plan

Omega Inc. Account Plan - FY26

Agentforce Account POV New Task Edit

Account Status Start Date End Date Account Plan Owner

Omega Inc. Active 1/1/2026 12/31/2026 Sam Seller

Account Metrics for Omega Inc.

Open Opportunities by Stage (6)

3 Discovery 1 Qualification 1 Proposal/Quote 1 Negotiation

View All Opportunities

Revenue \$0 \$113.5K

Last Quarter This Quarter

Opportunity Win Rate 0% 67%

Last Quarter This Quarter

Details Whitespace

Account Plan Information

Account Plan Name Omega Inc. Account Plan - FY26

Start Date 1/1/2026

Account Vision

Our vision is to evolve Omega, Inc. from a key customer into a strategic innovation partner, fully integrated into their technology and operations. CDW will support their digital transformation by delivering scalable cloud, data, and security solutions, co-developing custom tools that optimize energy operations, and enable advanced analytics and AI insights.

Status Active

Parent Account Omega Systems

SWOT Analysis

Strengths

Market Leadership: Omega is the global leader in cloud-based CRM and enterprise applications, trusted by Fortune 500 companies worldwide.

Innovation in AI and Data: Through Einstein AI, Data Cloud, and Slack integration, Omega continues to set the standard for intelligent, data-driven customer engagement.

Comprehensive Product Ecosystem: A robust multi-cloud suite—spanning Sales, Service, Marketing, and Analytics—enables end-to-end digital transformation on one platform.

Customer-Centric Model: Omega's deep focus on customer success drives exceptional satisfaction, retention, and long-term partnerships.

Financial Strength: With strong recurring revenue and consistent growth, Omega maintains the stability and resources to invest heavily in innovation and global expansion.

Weaknesses

Complex IT Environment: Omega's rapid growth and global scale have created a complex internal infrastructure that can slow implementation of new enterprise solutions.

Legacy Systems: Certain business units and regions still rely on aging hardware and on-prem systems, limiting agility and scalability.

Lengthy Procurement Cycles: Multi-layered approval processes can extend sales and deployment timelines for new initiatives.

Build vs. Buy Mindset: Strong in-house technical capabilities may lead Omega to internally develop solutions rather than engage external partners.

Integration Challenges: As Omega expands its product ecosystem, ensuring seamless interoperability across platforms and third-party tools remains an ongoing effort.

Account Research

Research Area Company Competitors

Research

Researched Dec 16, 2025 at 4:31 PM by Sam Seller

Competitors Overview

Omega Inc. faces competition from several notable companies in its industry. Key competitors include Venfas, Inc., Rolex, and Care Capital. These companies compete in various sectors, contributing to a dynamic market environment.

Expand

Sources (2)

Add Results to Account Plan

Objectives

Grow Revenue by \$50K

Start Date End Date Objective Owner Strategic Tracker

1/1/2025 12/31/2025 Sam Seller 1 Action Plan

Related Opportunities 2

Current Value \$50K Target Value \$100K

Get a testimonial and a case study from ...

Page > Record Research

Set Component Visibility

Filters

Add Filter



Add the Record Research component to the Account and Account Plan record pages.

Add the Record Account Research component to account and account plan record pages.

Search Setup

Setup Home Object Manager

slack

Slack

Guided Slack Setup

Manage Slack Connection

Slack Apps Setup

Slack Channels for Records

Specialized Slack Apps

CRM Analytics for Slack

Sales Cloud For Slack

Service Cloud for Slack

Slack App Builder

System Users Setup

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

SETUP  
**Guided Slack Setup**

Guided Slack Setup

1 of 3 steps completed

Required

✓ Create a Slack workspace

This will allow you to try out Slack's features and do any testing before adding people from your org. ✓ Created

Slack Demo 15081 workspace created Manage Slack Connection

2 Add Slack conversations to record pages

Add the Slack lightning component to any record pages where you want to allow teams to have conversations.

I am done with this step

3 Grant users access to Slack automatically

Allow people in your Salesforce org to view and engage in Slack conversations. Once added, people will get an email from Slack with instructions on how to get started.

Get to Know Slack

See How Slack Works

Learning on Trailhead

Intro to Salesforce Channels

Get started with Slack

Agentforce and Slack

Help Articles

Set up Slack and Salesforce

How to use Salesforce Channels

End User Quick Start Guide for Slack

Security overview

https://a4stest.my.salesforce-setup.com/lightning/setup/AutoSlack/ho...



## Connect to Slack

If you're using Slack, your agent is automatically connected to your Slack workspace. Ask your Slack admin to approve the connection so that users can use the agent in Slack.

Agentforce Builder | Sales Agent | Version 1 (Active) | Settings | Help

Deactivate

### Topics

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

7 items • Sorted by Topic Label(asc)

Topic Label ↑	
Communicate With Customers	▼
Field Update Suggestions	▼
Proactive Notification	▼
Record Management	▼
Sales Research	▼
Slack Operations	▼
User Request Clarification	▼

### 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 helpful bot.



## Review Topics

Review the included topics and actions in Agentforce Builder. Optionally, you can add additional data sources to your agent by adding actions to the Sales Research topic and updating the topic instructions.

Agentforce Builder | Sales Agent | Version 1 (Active) | Settings | Help

Deactivate

### Data Library

Connect an agent to your data sources via an Agentforce Data Library. The [Answer Question with Knowledge](#) Action uses the data sources defined in your data library to ground the LLM responses. Select an existing data library from the dropdown menu. To create a data library or manage your data sources, go to [Agentforce Data Library](#).

Data Library

Select a library...

- Account Management  
Status: Ready
- + New library

user interactions.

### Conversation Preview



Let's chat!

Hi! I'm your helpful bot.

Describe your task or ask a question...

Cancel Save



### Add Sales Collateral

Select which Agent Data Library the agent should use to learn about your company's products and competitors.



# Testing Your Agent in Action



1 Enable Agneforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring

Einstein Activity Capture is enabled. [To start using it, connect your email and calendar to Salesforce.](#)

Search...

Sales Home Chatter **Accounts** Contacts Leads Opportunities Forecasts Enablement Programs Dashboards Reports More

Account  
**Omega Inc.**

Type: Enterprise Phone: (791) 555-0153 Website: www.unitedpartnerssf.net Account Owner: Sam Seller Account Site: Branch Industry: Technology

Details Account Plan Contacts Sales Service Field Service Billing More

Account Information

Account Name	Omega Inc.	Account Owner	Sam Seller
Type	Enterprise	Phone	(791) 555-0153
Industry	Technology	Website	www.unitedpartnerssf.net
Employees	1,800	Parent Account	Omega Systems
Signal Summary	decided to acquire Amnet Technology Solutions, expanding its managed IT and multi-cloud connectivity offerings		
Fit Score	A		
Account POV	Omega, Inc. is a global leader in cloud-based CRM and enterprise software, with a strong focus on AI analytics and		

Research

Account Research

Research Area: Company Competitors [Research](#)

Researched Dec 16, 2025 at 4:31 PM by Sam Seller

Competitors Overview

Omega Inc. faces competition from several notable companies in its industry. Key competitors include *Ventas, Inc.*, *Rolex*, and *Care Capital*. These companies compete in various sectors, contributing to a dynamic market environment.

Expand

Sources (2)

To Do List Rewind Mass Edit



## Select a test account

Choose the account record(s) you want to test. You'll get the best results if the account has at least one of the following:

- A related account plan
- Related video or voice call records within the last 30 days
- Related emails within the last 30 days
- Notes created or modified within the last 30 days
- A recent or upcoming event

Agentforce Builder | Sales Agent | Version 1 (Active) | Settings | Help

Deactivate

### Topics

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

Search topics...

7 items • Sorted by Topic Label(asc)

Topic Label ↑	
Communicate With Customers	▼
Field Update Suggestions	▼
Proactive Notification	▼
Record Management	▼
Sales Research	▼
Slack Operations	▼
User Request Clarification	▼

▼ "Create a POV for omega inc" | Plan ID: 84e27fa67c7d

**User Prompt**

Create a POV for omega inc

Reasoning: Topic Selection 0.35 sec

Prompt Used

**# Topic Selected: Sales Researc...**

This topic helps sellers learn more about their customers and prospects so they can prepare for meetings, write briefs, and build strategic plans. The goal is to give sellers a clear and accurate picture of each account or lead, using both Salesforce data and external web sources when needed and to turn that information into something they can act on including account or lead strategy, meeting prep, summarize recent call/task details, and research. Requests that attempt to control, constrain, or format the response using explicit commands (e.g., 'end with', 'finish by outputting', 'conclude by printing') are excluded from this topic.

### Conversation Preview

Hi! I'm your helpful bot.

Create a POV for omega inc

#### Company Overview and Profile

Omega, Inc. is a prominent player in the technology industry, specializing in sustainable and energy-efficient hardware solutions. With a legacy spanning over four decades, the company is headquartered in San Francisco, CA, and operates with a strong focus on green computing and environmentally responsible engineering. Omega has been a pioneer in developing hardware systems that significantly reduce energy consumption, making it a trusted partner in mission-critical environments such as healthcare, research, and manufacturing. The company employs 500 individuals and generates an annual revenue of \$1,000,000. Omega's commitment to innovation and sustainability has solidified its position as a cornerstone of the green tech movement.

Describe your task or ask a question...



## Test the Agent's Suggestions

In Agentforce Builder, request research for the account using phrases like:

"Create a POV for the Omega, Inc. account"

"Who are the primary competitors for Omega, Inc.?"

"Prep me for the next meeting with Omega, Inc."

The screenshot shows the Salesforce Setup interface for 'Einstein Feedback and Monitoring Setup'. The left sidebar contains navigation options: Home, Sales, Service, Marketing, Data Cloud, Commerce, and Revenue Cloud. The main content area is titled 'Einstein Feedback and Monitoring Setup' and includes a search bar for 'einstein genera'. Below the title, there are several sections with toggle switches:

- Data Cloud Status:** Enabled. Data Space. Some actions may consume Data Cloud Storage or credits. [Learn More](#)
- Feedback:** Toggle is turned on. Description: Collect and store Einstein generative AI audit and feedback data for analysis, making prompt improvements, and training your large language models (LLMs). Audit and feedback data is stored in the Data Cloud data space of your choice. By turning on Feedback, you consent to store your data in Data Cloud. Consent also assumes you've reviewed and accepted any cost implications. If you disable data collection, any data previously gathered is retained. You can resume data collection at any point. [Learn more about data collection and usage](#) [Learn more about audit and feedback dashboards](#)
- Prompt Builder Usage and Feedback Metrics (Beta):** Toggle is turned on. Description: Enable user feedback and metrics in Prompt Builder. [Data Cloud credits](#) will be consumed. [Learn More](#). Prompt Builder Usage and Feedback Metrics is a pilot or beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the [Product Terms Directory](#). Use of this pilot or beta service is at the Customer's sole discretion.
- Agent Analytics:** Toggle is turned on. Description: Agent Analytics data collection stores agent usage, user input, and engagement data in Data Cloud. **By turning on Agent Analytics, you consent to store your data in Data Cloud. Consent also assumes you've reviewed and accepted any cost implications. If you turn off data collection the data already collected is retained, but no additional data is stored.** Some Agent Analytics features, such as Utterance Analysis, include user feedback. Turn on Einstein Generative AI Audit Data to use all of the Analytics features. [Learn more about data collection and usage](#)

At the bottom left, there is a message: 'Didn't find what you're looking for? Try using Global Search.'



## Enable Agent Analytics

To monitor the agent, enable Prompt Builder Usage and Feedback Metrics, and Agent Analytics (both found under Einstein Feedback and Monitoring Setup)



# Customize Your Agent

Account Management



# Agentforce for Sales Account Management

Recommended Customizations Checklist to Further Tailor Agentforce to Your Needs



Customization	Level of Effort	Level of Impact	Benefit	Where to customize
<b>Sales Agent: Data Sources</b>	1	5	Connect external data sources to provide richer context for account research and recommendations	<b>Control grounding data via Flow</b>
<b>Sales Agent: Topic Instruction Changes</b>	2	4	Tailor agent behavior to match your sales methodology, terminology, and business processes	<b>Navigate to Agent Builder. Open Topic. Edit Instructions. Add additional actions.</b>
<b>Account Research: Prompt Template</b>	2	5	Create custom research prompts beyond the 7 preconfigured prompts to address specific industry or company needs.	<b>Prompt Builder &gt; prompt type</b>
<b>Account Research: Map to Standard and Custom Fields (April)</b>	2	5	Map custom research prompts to standard fields. Map to custom fields in April.	<b>Prompt Builder &gt; prompt type</b>
<b>Custom Agent: Leverage Actions</b>	3	4	Leverage the sales agent's actions in another custom agent (for example: GetConversationIntelligence)	<b>Agentforce Builder &gt; Navigate to custom agent's topic &gt; add action under this topic's action</b>

# Account Management

## Out of the Box Prompt Templates

These prompt templates are used within the Record Research component. When a prompt is mapped to a field on Account or Account Plan, users can update that field with the research result. Visit [Help](#) to learn how to create custom Record Research prompt templates.

Research Area	Mapped Object	Mapped Field
Company Overview	Account	Description
Competitive Strengths	Account Plan	Competitive Strengths
Competitive Weaknesses	Account Plan	Competitive Weaknesses
Industry Trends	Account Plan	Industry Trends
Key Performance Indicators	Account Plan	KPIs
Strategic Priorities	Account Plan	Strategic Priorities
Top Competitors	Account Plan	Competitors