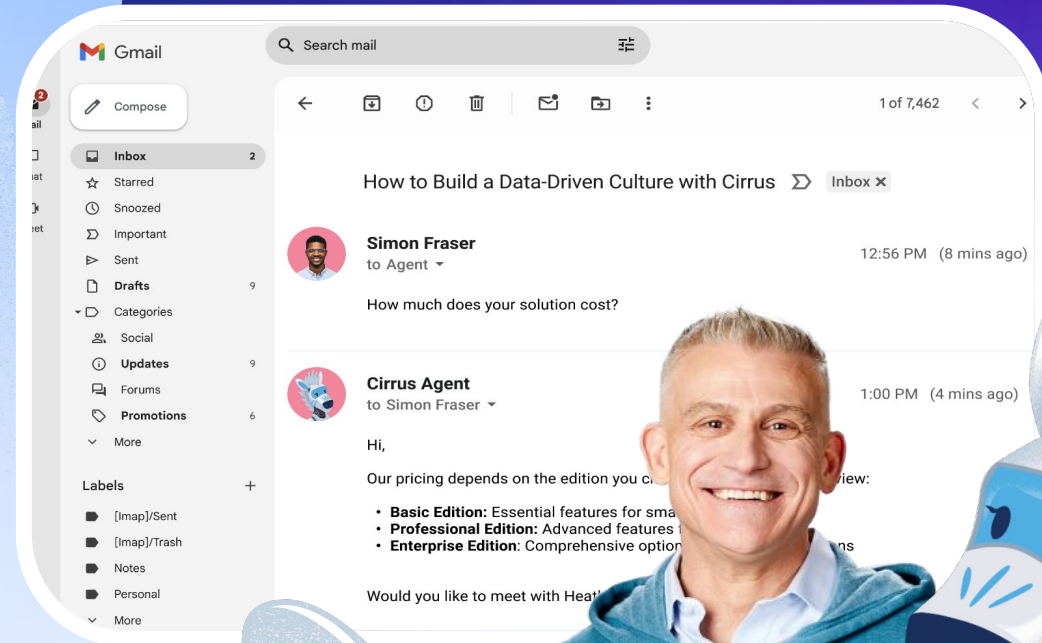




Introducing Agentforce for Sales

Autonomous agents to scale
your sales team

May 2025



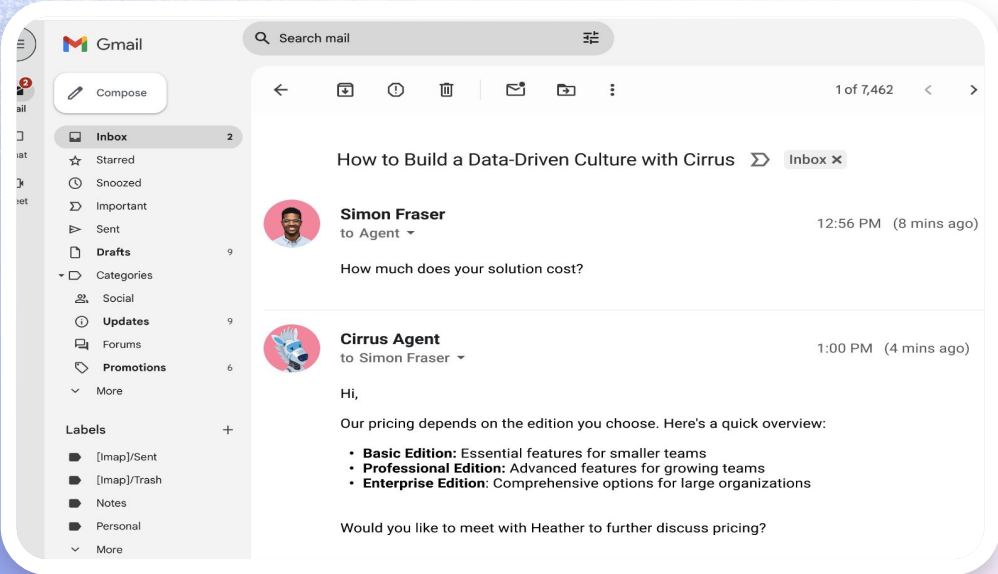
Introducing

Agentforce for Sales

Fuel limitless sales teams with a digital workforce

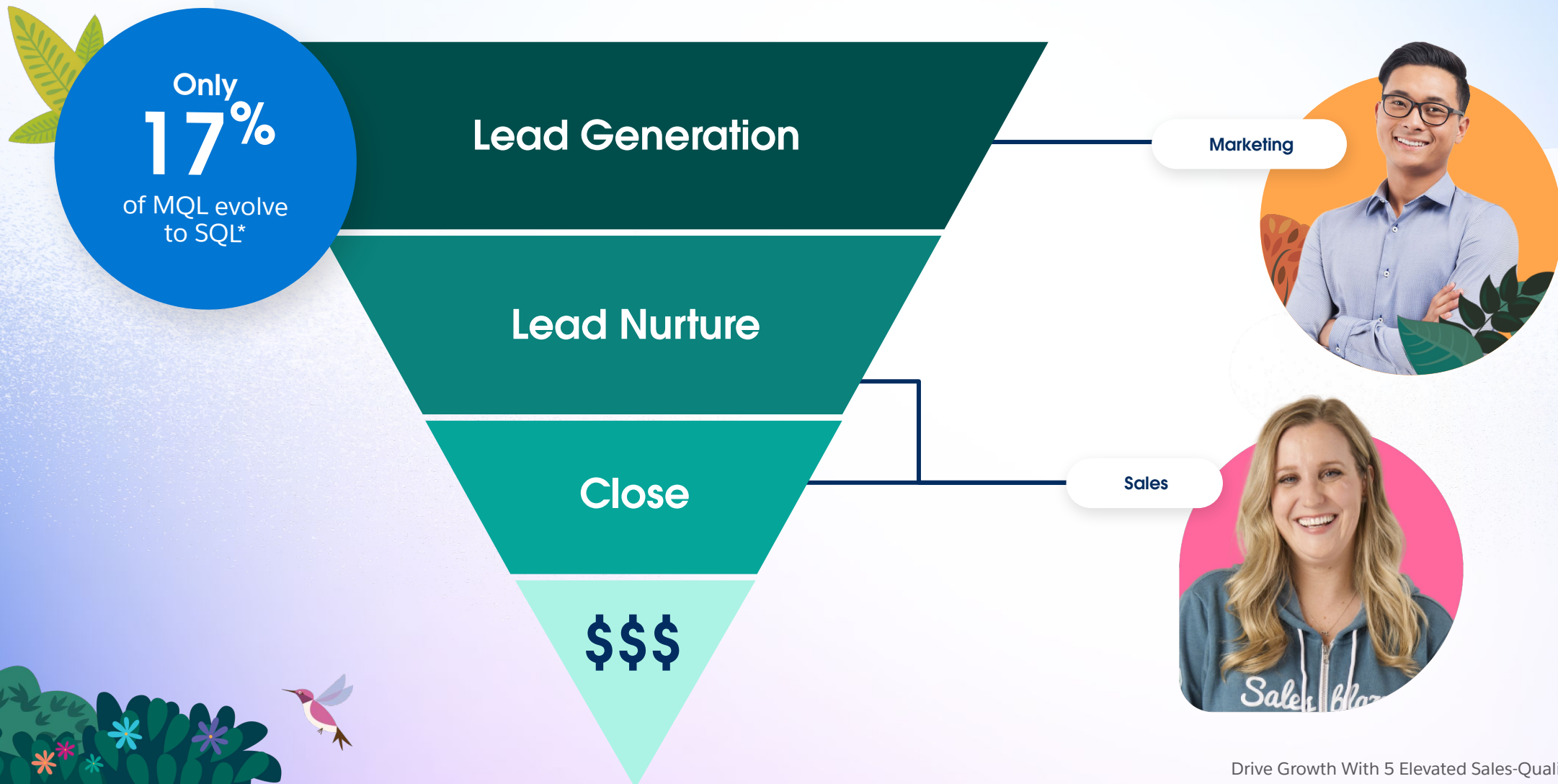
Sales Development

Maximize pipeline by nurturing inbound leads 24/7



Sellers are **wasting time on low quality leads**

Not All Leads Are Created Equal



Lead nurturing is challenging

79%

of marketing leads never convert to sales due to lack of nurturing

Lead Generation

Lead Nurture

Close

\$\$\$

Engage Prospects

Qualify Leads

Nudge

Answer Question

Handle Question

Book Meeting

Meet Customer

Sales Development

Maximize pipeline by nurturing inbound leads 24/7

Never miss an inbound lead

Autonomously answer product questions, handle objections, and book meetings

Personalized conversations across channels

Relevant responses, grounded in your sales and customer data, that resonate with prospects

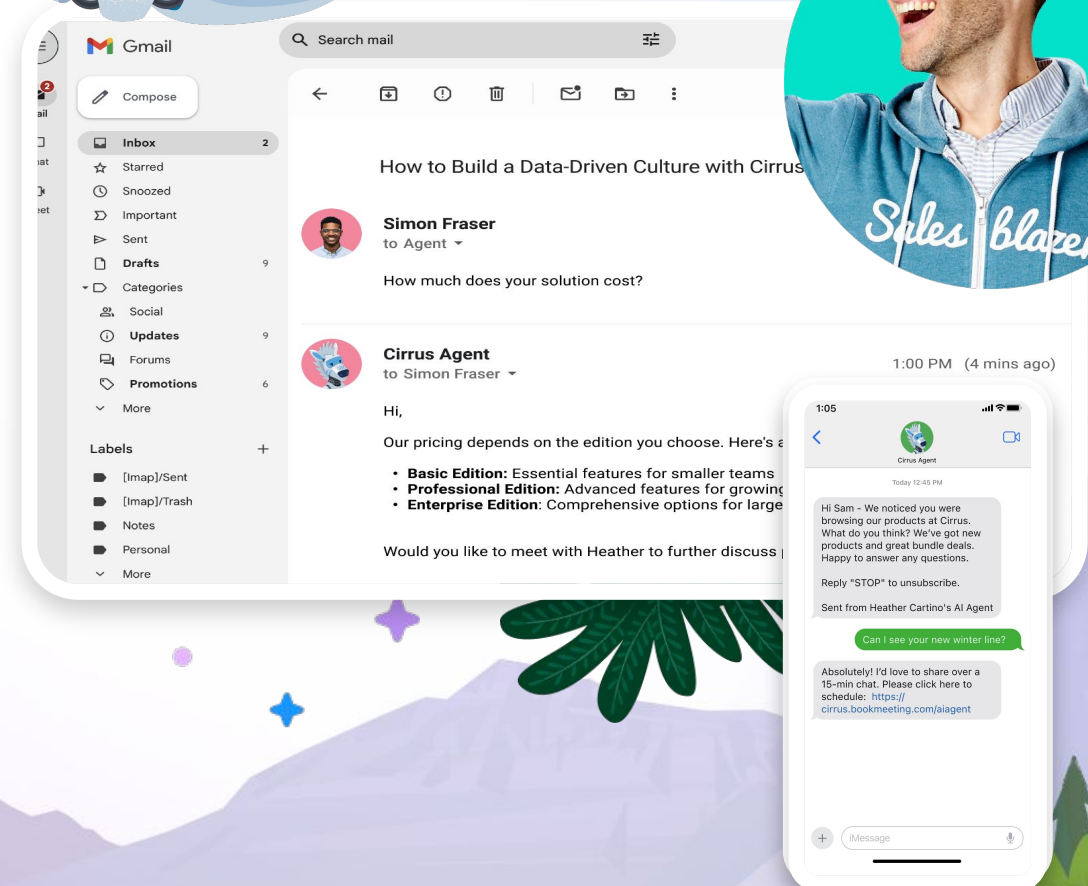
Automate prospecting with confidence

Monitor performance, ensure seamless hand-off from agent to seller, and measure ROI

Easy set up & customization

Start in minutes with pre-built templates and customize to fit your business needs

Agentforce



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

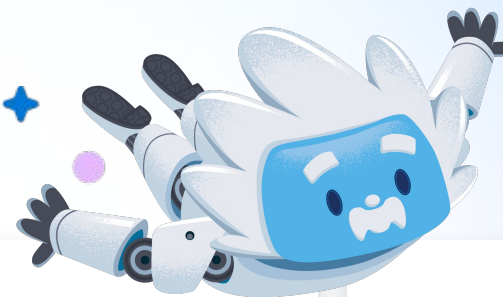
What shouldn't
they do



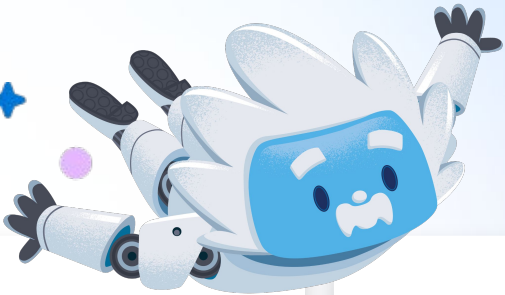
Channel

Where do
they work

Trust & Security



The 5 attributes of sales development



Role

Nurture
inbound leads
to advance
pipeline



Data

CRM & External
data



Actions

Outreach,
answer
questions, &
book meeting



Guardrails

When & how
often to engage
which leads



Channel

Email

Trust & Security





Sales Development

Define jobs to be
done with

Topics

Send Outreach

Respond to Prospect

Manage Opt-Out

Give each
topic specific

Instructions

1. Always draft an email before scheduling an email.
2. If the request is introduction, initial outreach email, draft an initial outreach email for user.
3. If the request is revise followup or nudge email, then use Draft a Nudge, followup or revise Email action.
4. You must schedule an email after drafting an email.

Create and
assign intelligent

Actions

Draft Initial Outreach Email*

Draft Nudge Email*

Schedule Email

*OOTB Prompt Templates



Sales Development

Define jobs to be
done with

Topics

Send Outreach

Respond to Prospect

Manage Opt-Out

Give each
topic specific

Instructions

1. Always draft an email before scheduling an email.
2. You must schedule the email after drafting an email.
3. You must always use context variables for the input of this action.
4. If Lead_Owner_has_Inbox set to TRUE or true, then you must add "Lead Owner has Inbox Enabled" to additional instruction for prompt template.

Create and
assign intelligent

Actions

Draft Generic Reply Email*

Draft Meeting Request Email*

Schedule Email

Draft Email for Lead Question*

**Answer Questions with
Knowledge**

*OOTB Prompt Templates



Sales Development

Define jobs to be
done with

Topics

Send Outreach

Respond to Prospect

Manage Opt-Out

Give each
topic specific

Instructions

1. If lead or prospect has requested to stop receiving messages, or to opt out, you must perform the Opt Out Lead action
2. You must always use context variables for the input of this action

Create and
assign intelligent

Actions

Opt Out Lead*

*Flow

Sales Development Runtime

Agentforce SDR Agent

Prospect



- Initial Outreach is first triggered action after lead is assigned to Agent; 1 hour delay in send
- # of nudge or reply email attempts, time between attempts, and Agent outreach schedule configurable in Agent Builder as engagement rules
- Emails are captured on activity timeline
- A different opt out field on lead record can be selected vs the defaulted field in (Email Opt Out) in Flow Builder



Demo

Sales Development



2

Mail

Chat

Meet

Compose

Inbox

2

Starred

Snoozed

Important

Sent

Drafts

9

Categories

Social

Updates

9

Forums

Promotions

6

More

Labels

+

[Imap]/Sent

[Imap]/Trash

Notes

Personal

More

Search mail

1 of 7,462

<

>

How to Build a Data-Driven Culture with Cirrus

Inbox x

Simon Fraser

to Agent

12:56 PM (8 mins ago)

How much does your solution cost?

Cirrus Agent

to Simon Fraser

1:00 PM (4 mins ago)

Hi,

Our pricing depends on the edition you choose. Here's a quick overview:

• **Basic Edition:** Essential features for smaller teams

• **Professional Edition:** Advanced features for growing teams

• **Enterprise Edition:** Comprehensive options for large organizations

Would you like to meet with Heather to further discuss pricing?



Before You Get Started

Sales Development



Identifying Your Use Case Fit

Sales Development is a great fit if you...

- ✓ Have a large volume of leads
- ✓ Are unable to nurture and respond quickly to leads
- ✓ Use email to engage leads
- ✓ Need to increase sales rep productivity by offloading low-value work
- ✓ Aim to automate and optimize the lead qualification while personalizing outreach
- ✓ Need to streamline meeting scheduling and ensure only sales-ready leads reach your team
- ✓ Strive to equip reps with information gathered from leads before their conversations

Technology Considerations



		Yes	No
Objects	Do you currently use or plan to use the Salesforce Lead object, Contact Object, or Person Account object ?	✓	✗
Digital Channels	Do you currently use or will you be using email to engage with leads or prospects?	✓	✗
	Can you provision a dedicated email for the Sales Development Agent?	✓	✗
Product Supporting Features	Do you currently use or are you willing to use Einstein Activity Capture ? And are you comfortable with emails being captured and stored on Hyperforce and AWS? Considerations for using EAC	✓	✗
	Are you currently <u>not</u> using Activity 360 ?	✓	✗
	Do you currently use or are you willing to use Salesforce Inbox instead of a third-party booking system to schedule meetings between leads, prospects, and sales reps?	✓	✗
Sandbox Readiness	Is Data Cloud properly enabled in your Sandbox environment?	✓	✗

All of these conditions must be met to activate Agentforce for Sales Development

Launchpad Checklist



Prime Your Team for Success with Essential Pre-Launch Activities!

Ensure Your Organization is Agent Ready

Inbox

- ☐ Enable Inbox permissions for the sellers on whose behalf Agentforce will be booking meetings
- ☐ Inform those sellers to [connect their Email and Calendar Accounts](#) so the agent can provide their specific meeting booking link in the email
- ☐ Inbox may require approval by the customer's security team. See [Security Guide](#) for details.

Agent Email

- ☐ Provision a new email address on your company's domain to be used solely by the agent

Einstein Activity Capture

- ☐ Review [Considerations for using EAC](#)
- ☐ Enable EAC and create a default EAC configuration that shares emails to be used by Agentforce

Plan for Success

- ☐ Identify key stakeholders:
 - ☐ Who will be creating and testing the agent?
 - ☐ Who will be using the agent in production?
 - ☐ Who will be reviewing agent output and deciding whether additional outreach customization will be required?
 - ☐ If customization is required, who will be customizing, testing, and reviewing the prompts?
- ☐ Determine which leads will be given to the work and how to segment them
- ☐ Determine what types of questions the agent should answer, and prepare the knowledge files to train the agent

Org Readiness Accelerates Deployment

Agentforce for Sales Development Required Features

Feature	SKU Name	SDR Agent uses the feature to:
Einstein Copilot Einstein Generative AI	Einstein for Sales	Unlock generative AI and the Agentforce platform.
Einstein Activity Capture (EAC)	Einstein for Sales	Access it's inbox using your email application and ensure the emails are captured in Salesforce. The agent uses EAC when generating outreach and reply emails.
Sales Engagement	Agentforce*	Engage leads or prospects with structured outreach cadences.
Automated Actions	Agentforce*	Add, remove, and manage leads or prospects in outreach cadences.
Salesforce Inbox	Agentforce*	Generate a personalized meeting booking link on behalf off the seller.
Data Cloud - Retrieval Augment Generation (RAG)	Data Cloud** -and/or- Salesforce Foundations - Data Cloud Segmentation and Activation and Data Cloud Provisioning	Generate relevant and accurate responses to lead questions using information you upload about your company. Provide auditing, feedback, Trust Layer, and analytics.

*One (1) Sales Engagement license is included with the Agentforce SKU

** Need to ensure Data Cloud is properly enabled in Sandbox Environment. See [Data Cloud Missing from Sandbox Env](#) for more information.

Agentforce for Sales Development Permissions

[SDR Agent Permissions Set Help](#)

	Permission Set(s)	Description
SDR Agent User	<ul style="list-style-type: none">Agentforce SDR Agent	Allows the SDR Agent [user record] to reach out to prospects automatically with full reporting capabilities
Sales Manager / Admin	<ul style="list-style-type: none">Configure Agentforce SDR AgentData Cloud User	Allow sales manager to view and configure the SDR Agent in Agent Builder, manage, and deploy SDR Agent for prospect outreach
Sales User	<ul style="list-style-type: none">Use Agentforce SDR AgentInbox Perm<ul style="list-style-type: none">Inbox With Einstein Activity Capture is recommended (see slide for more details)	Allow sales users to access and interact with Agentforce SDR, and send leads to SDR Agent



Create Your Agent

Sales Development



Agentforce Sales Development Overview

1 Enable Agentforce for Sales

Enable required features and complete prerequisite setup steps

Time: 8-10 mins

2 Create and Configure

Create and configure Sales Agent for Lead Nurturing

Time: 5-7 mins

3 Test and Preview

Test and preview email scenarios before activation

Time: 3-5 mins

4 Runtime and Monitoring

Monitor your agent activity and outcomes

Time: 15-20 mins



Prompt customization is covered in the Agent Testing section. Setup time varies depending on the degree of customization you choose to implement.

1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

The screenshot shows the Salesforce Go Setup interface. On the left is a navigation sidebar with categories: Setup Home, Salesforce Foundations, Salesforce Go (highlighted), Service Setup Assistant, Service Cloud Reports, Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Manage Subscription, Sales Cloud Everywhere, ADMINISTRATION (with sub-items Users, Data, Email), PLATFORM TOOLS (with sub-item Apps), and Feature Settings. The main content area has a top navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this is a 'Salesforce Go' header with a welcome message and an 'Enterprise Edition' badge. A secondary navigation bar includes 'Home', 'Feature Sets', 'Features', and 'My Clouds'. The main content area is titled 'Get Started With Agentforce' and features a search bar. A card for 'Agentforce for Sales' is highlighted with a purple border; it includes the text 'Scale your sales team and boost sales rep productivity with Agentforce.' and buttons for 'Set Up' and 'Watch a Video'. Other cards visible include 'Unify Prospect Communications', 'Get Started with Service Cloud', and 'Resolve Issues with Self-Service'.



Discover Agentforce for Sales in Salesforce Go

Find Salesforce Go in Setup.

Discover Agentforce for Sales in Go Home.

1

Enable Agnetforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

Setup Home

Salesforce Foundations

Salesforce Go

Service Setup Assistant

Service Cloud Reports

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

Sales Cloud Everywhere

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Apps

Feature Settings

Quick Find

Salesforce Go > Agentforce for Sales

Agentforce for Sales

Scale your sales team and boost sales rep productivity with Agentforce.

[Refresh](#)

Turn On Agentforce

After you turn on Agentforce, the configuration steps will appear on this setup page you want to build and enable its template. Then, go to Agentforce Builder to create, agents.

☒ Turn On Einstein Generative AI ⓘ

[Review](#)

[Turn On](#)

See the type of agent

Agentforce for Sales

[See How It Works](#)

Feature Sets

- [Boost Seller Productivity with AI](#)
- [Nurture Sales Leads](#)
- [Manage Seller Performance](#)

Feature Highlights



Discover Agentforce for Sales in Salesforce Go

Turn on Agentforce.

1

Enable Agentforce for Sales

2

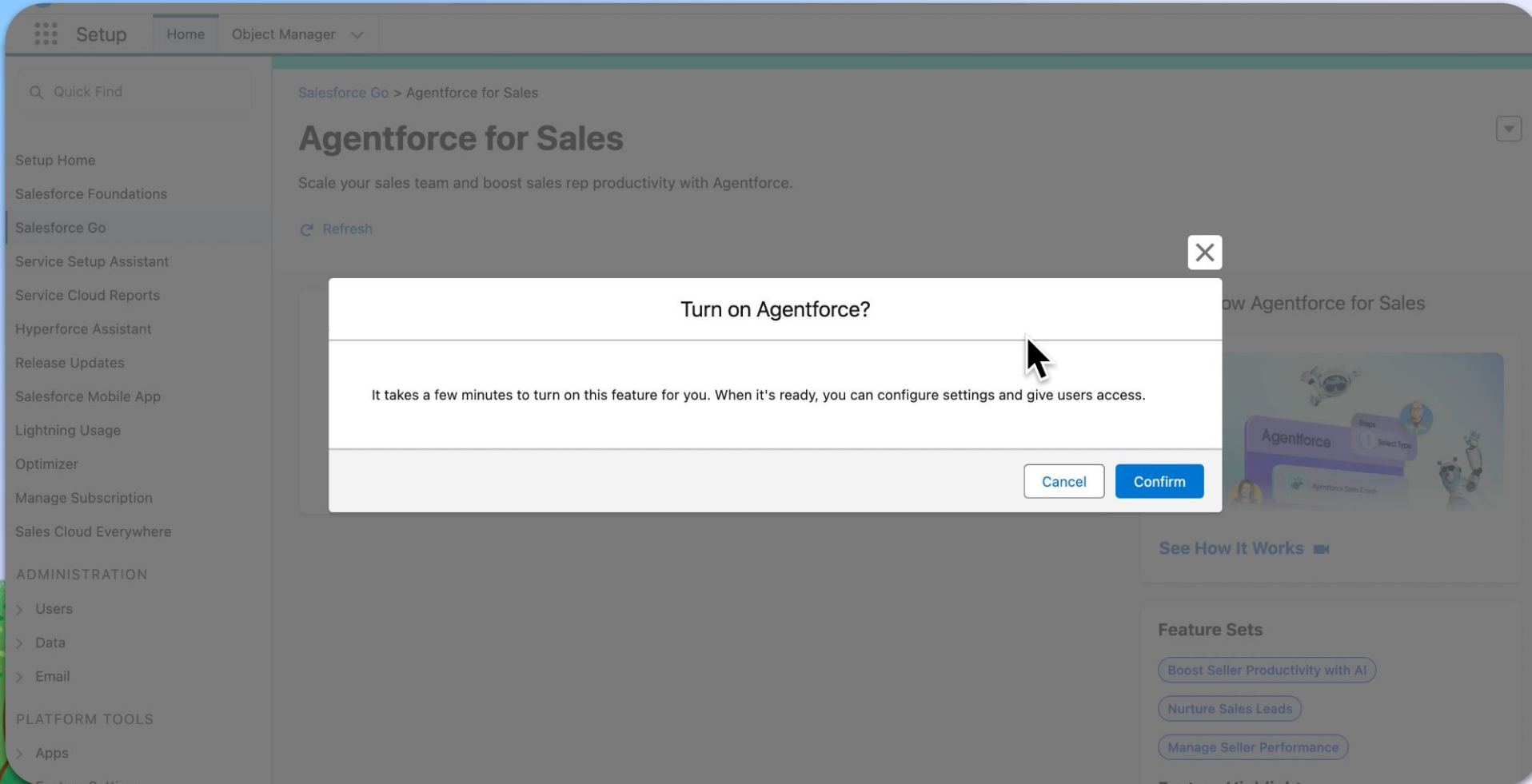
Create and Configure

3

Test and Preview

4

Runtime & Monitoring



Discover Agentforce for Sales in Salesforce Go

Turn on Agentforce. Click 'confirm' and wait until Agentforce is turned on.

1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

Setup Home

Salesforce Foundations

Salesforce Go

Service Setup Assistant

Service Cloud Reports

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Apps

Feature Settings

Quick Find

Salesforce Go > Agentforce

Agentforce for Sales was turned on and is ready to configure.

Agentforce for Sales

Scale your sales team and boost sales rep productivity with Agentforce.

0 of 2 Templates Fully Configured Refresh

Turn On Agentforce

On

After you turn on Agentforce, the configuration steps will appear on this setup page. Choose the type of agent you want to build and enable its template. Then, go to Agentforce Builder to create, configure, and activate the agents.

Turn On Einstein Generative AI Review

Enable Sales Agent Templates

Templates are focused, ready-to-use agent configurations. When you enable a template, it becomes available for use in Agentforce Builder.

Agentforce Sales Coach

See Considerations Setup Help

Advance deals and boost ROI with AI-powered coaching feedback at every stage of a sale.

Get to Know Agentforce for Sales

See How It Works

Feature Sets

Boost Seller Productivity with AI

Nurture Sales Leads

Manage Seller Performance



Discover Agentforce for Sales in Salesforce Go

Verify that Agentforce is on.

You can see subsequent Sales Agent Templates once Agentforce is on.

1

Enable Agnefforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Salesforce Foundations, Salesforce Go, Service Setup Assistant, Service Cloud Reports, Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Manage Subscription, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Apps). The main content area is titled 'Turn On Einstein Generative AI' with a 'Review' link. Below this, the 'Enable Sales Agent Templates' section explains that templates are ready-to-use agent configurations. Two templates are listed: 'Agentforce Sales Coach' and 'SDR Agent | Inbound Nurturing'. The 'Agentforce Sales Coach' template is currently disabled (toggle off). The 'SDR Agent | Inbound Nurturing' template is also disabled. A tooltip points to the 'Turn On Sales Engagement' step in the SDR Agent setup process, stating: 'Create sales processes and automation, playbooks and reporting, and make it easy for sales reps to know the next step for each prospect they're nurturing.' The right sidebar contains sections: 'See How It Works' with a video link, 'Feature Sets' (Boost Seller Productivity with AI, Nurture Sales Leads, Manage Seller Performance), 'Feature Highlights' (Generative AI), 'See the Latest Updates' (New in Agentforce for Sales), 'Learn on Trailhead' (Agentforce for Sales: Quick Look), and 'Explore Salesforce Help' (Agentforce for Sales).

Setup Home

Salesforce Foundations

Salesforce Go

Service Setup Assistant

Service Cloud Reports

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

Sales Cloud Everywhere

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Apps

Quick Find

Turn On Einstein Generative AI

Review

Enable Sales Agent Templates

Templates are focused, ready-to-use agent configurations. When you enable a template, it becomes available for use in Agentforce Builder.

Agentforce Sales Coach

See Considerations Setup Help

Advance deals and boost ROI with AI-powered coaching feedback at every stage of a sale.

SDR Agent | Inbound Nurturing

See Considerations Setup Help

Create sales processes and automation, playbooks and reporting, and make it easy for sales reps to know the next step for each prospect they're nurturing.

Automate engagement with existing leads and prospects around the clock.

- Turn On Sales Engagement
- Turn On Automated Actions
- Turn On Einstein Activity Capture
- Turn On Email Productivity

Review

Review

Review

Review

See How It Works

See How It Works

Feature Sets

- Boost Seller Productivity with AI
- Nurture Sales Leads
- Manage Seller Performance

Feature Highlights

- Generative AI

See the Latest Updates

New in Agentforce for Sales

Learn on Trailhead

Agentforce for Sales: Quick Look

Explore Salesforce Help

Agentforce for Sales



Activate Sales Agent for Lead Nurturing

Turn on Sales Agent for Lead Nurturing.

View all features that will be turned on automatically.

1

Enable Agnetforce for Sales

2

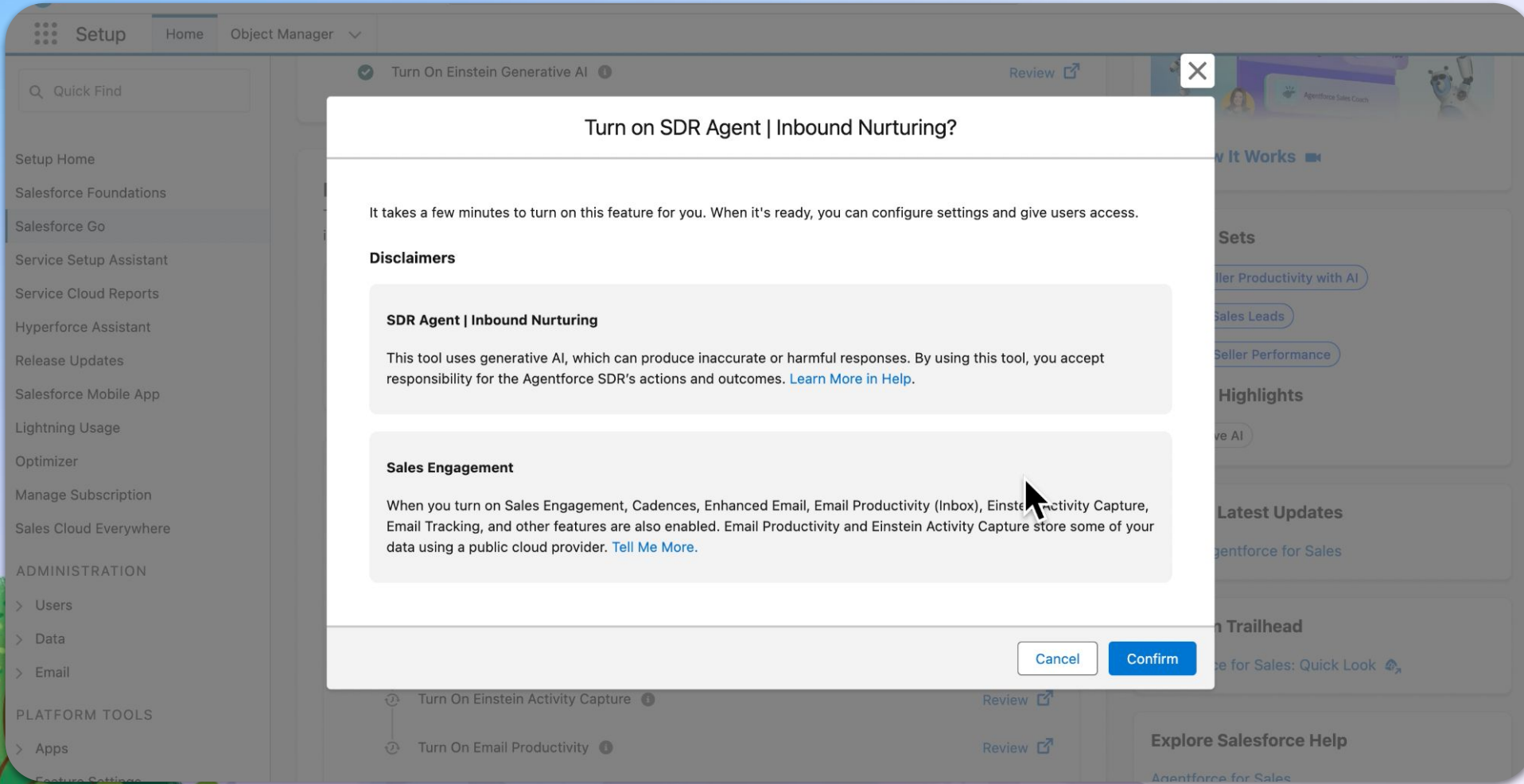
Create and Configure

3

Test and Preview

4

Runtime & Monitoring



Activate Sales Agent for Lead Nurturing

Review the disclaimers before feature activation.

1

Enable Agnetforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

Setup Home

Salesforce Foundations

Salesforce Go

Service Setup Assistant

Service Cloud Reports

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Apps

Quick Find

Turn On

SDR Agent | Inbound Nurturing was turned on and is ready to configure.

Enable Sales Agent Templates

Templates are focused, ready-to-use agent configurations. When you enable a template, it becomes available for use in Agentforce Builder.

Agentforce Sales Coach

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

Advance deals and boost ROI with AI-powered coaching feedback at every stage of a sale.

SDR Agent | Inbound Nurturing

1 of 3 Required steps completed

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

Automate engagement with existing leads and contacts to improve your sales pipeline around the clock.

Turn On Sales Engagement [Review](#)

Turn On Automated Actions [Review](#)

We validate the progress of this step for you. When you meet the minimum

Data Cloud

Assigned 0	200000 Total
Active 0	200000 Total

Get to Know Agentforce for Sales

[See How It Works](#)

Feature Sets

[Boost Seller Productivity with AI](#)

[Nurture Sales Leads](#)

[Manage Seller Performance](#)

Feature Highlights



Activate Sales Agent for Lead Nurturing

Once activated, you will see a verification toast message and subsequent setup steps.

1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

The screenshot shows the Salesforce Setup interface for the 'SDR Agent | Inbound Nurturing' feature. The left sidebar contains navigation links: Setup Home, Salesforce Foundations, Salesforce Go, Service Setup Assistant, Service Cloud Reports, Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Manage Subscription, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Apps). The main content area has a toggle switch for 'SDR Agent | Inbound Nurturing' which is turned on. Below the toggle, it indicates '1 of 3 Required steps completed'. A list of steps follows: 'Turn On Sales Engagement', 'Turn On Automated Actions', 'Turn On Einstein Activity Capture', and 'Turn On Email Productivity', each with a 'Review' link. A 'Manage User Access' section is highlighted with a purple box and a 'Manage' button. Below this is the 'Build an Agent' section, which shows '0 active agents' and a 'Limited Access' badge. The right sidebar contains promotional content for Agentforce, including 'See How It Works', 'Feature Sets' (Boost Seller Productivity with AI, Nurture Sales Leads, Manage Seller Performance), 'Feature Highlights' (Generative AI), 'The Latest Updates' (Agentforce for Sales), 'Learn on Trailhead' (Agentforce for Sales: Quick Look), and 'Explore Salesforce Help'.

Setup Home | Home | Object Manager

Quick Find

Setup Home

Salesforce Foundations

Salesforce Go

Service Setup Assistant

Service Cloud Reports

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Apps

Feature Settings

SDR Agent | Inbound Nurturing

1 of 3 Required steps completed

See Considerations Setup Help

Automate engagement with existing leads and contacts to improve your sales pipeline around the clock.

Turn On Sales Engagement Review

Turn On Automated Actions Review

Turn On Einstein Activity Capture Review

Turn On Email Productivity Review

Manage User Access

View permissions for SDR Agent | Inbound Nurturing and assign them to your users.

Build an Agent Limited Access

0 active agents

Go to Agentforce Builder

Agentforce

See How It Works

Feature Sets

Boost Seller Productivity with AI

Nurture Sales Leads

Manage Seller Performance

Feature Highlights

Generative AI

The Latest Updates

Agentforce for Sales

Learn on Trailhead

Agentforce for Sales: Quick Look

Explore Salesforce Help



Manage User Access

Give users access to Sales Agent for Lead Nurturing.

Click 'manage'

1

Enable Agnetforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

Manage SDR Agent | Inbound Nurturing User Access

Assign Permission Sets to Users ⓘ

Configure Agentforce SDR Agent (0) Data Cloud Admin (0) Use Agentforce SDR Agent (0)

Filters

Users

☐ All

☐ Assigned (0)

Agentforce SDR Access

Permission Set License

Available	Assigned
10000	0

Recently Viewed ▼ ⓘ

1 item • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Full Name	Title	Phone	Email
1	<input type="checkbox"/> OrgFarm EPIC			akhil.velpuri@salesforce.com

Assign

Done

You can also assign user access on the Permission Sets and Permission Set Groups pages in Setup.

[Go to Setup](#)



Grant Sales Users Access

To give your sales managers/admins permission to configure your Agentforce SDR agents, assign 'Configure Agentforce SDR Agent' and 'Data Cloud Admin' permission sets.

Select users from the list below and click 'Assign'

1

Enable Agnetforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

Setup Home

Quick Find

Setup Home

Salesforce Foundations

Salesforce Go

Service Setup Assistant

Service Cloud Reports

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

Sales Cloud Everywhere

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Apps

Manage SDR Agent Unbound Nurturing User Access

✓ Permission set Configure Agentforce SDR Agent was assigned to 1 user. ✕

Assign Permission Sets to Users ⓘ

Configure Agentforce SDR Agent (1) Data Cloud Admin (0) Use Agentforce SDR Agent (0)

Filters

Users

- ☒ All
- ☐ Assigned (1)

Configure and manage Agentforce SDR agent.

Agentforce SDR Access

Permission Set License

Available	Assigned
9999	1

Assignment Summary

1 item+

Full Name	User License	Status
OrgFarm EPIC	Salesforce	✓ Success

You can also assign user access on the Permission Sets and Permission Set Groups pages in Setup.

[Go to Setup](#)

[Assignment Summary](#)

[Done](#)



Grant Sales Users Access

To give your sales managers/admins permission to configure your Agentforce SDR agents, assign 'Configure Agentforce SDR Agent' and 'Data Cloud Admin' permission sets.

Select users from the list below and click 'Assign'

1

Enable Agnetforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

Setup Home

Quick Find

Setup Home

Salesforce Foundations

Salesforce Go

Service Setup Assistant

Service Cloud Reports

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Apps

Manage SDR Agent | Inbound Nurturing User Access

Assign Permission Sets to Users

Configure Agentforce SDR Agent (1) **Data Cloud Admin (1)**

Filters

Users

☒ All

☐ Assigned (1)

Allows access to Data Cloud Setup i functionality and data.

Data Cloud	
Permission Set License	
Available	Assigned
199999	1

Use Agentforce SDR Agent (0)

Assignment Summary

1 item+

Search this list...

Full Name	User License	Status
OrgFarm EPIC	Salesforce	Success

You can also assign user access on the Permission Sets and Permission Set Groups pages in Setup.

[Go to Setup](#)

[Close Summary](#)

[Done](#)



(Optional) Grant Sales Users Access

To assign leads to your agent, update/override upcoming communications, and see the agent's activity, **members of your sales team need certain permissions.**

Select users that you want to assign the '**Use Agentforce SDR Agent**' permission set and Click **Assign**. The **Use Agentforce SDR Agent permission set** allows human users to access and interact with Agentforce SDR.

1

Enable Agnetforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

The screenshot shows the Salesforce Setup interface for the 'SDR Agent | Inbound Nurturing' feature. The left sidebar contains navigation links: Setup Home, Salesforce Foundations, Salesforce Go, Service Setup Assistant, Service Cloud Reports, Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Manage Subscription, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Apps). The main content area has a 'Quick Find' search bar and a '2 of 3 Required steps completed' progress indicator. Below this, there are four steps: 'Turn On Sales Engagement', 'Turn On Automated Actions', 'Turn On Einstein Activity Capture', and 'Turn On Email Productivity', each with a 'Review' link. A 'Manage User Access' section shows '1 user is assigned to Data Cloud'. At the bottom, there is a 'Build an Agent' section with '0 active agents' and a 'Go to Agentforce Builder' button highlighted with a red box. The right sidebar includes a 'See How It Works' link, 'Feature Sets' (Boost Seller Productivity with AI, Nurture Sales Leads, Manage Seller Performance), 'Feature Highlights' (Generative AI), 'See the Latest Updates' (New in Agentforce for Sales), and 'Trailhead' links.

Setup Home

Salesforce Foundations

Salesforce Go

Service Setup Assistant

Service Cloud Reports

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Manage Subscription

Sales Cloud Everywhere

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Apps

Quick Find

SDR Agent | Inbound Nurturing

2 of 3 Required steps completed

See Considerations Setup Help

Automate engagement with existing leads and contacts to improve your sales pipeline around the clock.

- Turn On Sales Engagement Review
- Turn On Automated Actions Review
- Turn On Einstein Activity Capture Review
- Turn On Email Productivity Review

Manage User Access Manage

View permissions for SDR Agent | Inbound Nurturing and assign them to your users.

1 user is assigned to Data Cloud

Build an Agent 0 active agents

Go to Agentforce Builder

See How It Works

Feature Sets

- Boost Seller Productivity with AI
- Nurture Sales Leads
- Manage Seller Performance

Feature Highlights

- Generative AI

See the Latest Updates

New in Agentforce for Sales

Trailhead

for Sales: Quick Look

Explore Salesforce Help



Go to Agentforce Builder to Create & Configure your agent

The next part of setup is configuring the details of how your agent operates, including its working schedule, timing and frequency of outreach, and how it drafts initial emails and answers to lead questions.

Click [Go to Agentforce Builder](#).

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Runtime & Monitoring

← Agentforce Builder

New Agent

?

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Steps

✓ Select an agent

2 Select your topics

3 Customize your agent

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.**

Send Outreach

✓ Added

Draft and schedule Initial Outreach emails, or Nudge emails

[See Included Actions](#)

Respond To Prospect

✓ Added

Draft and schedule replies to prospects that have responded to an initial outreach. Must not use this topic if the email requests to opt out of receiving messages.

[See Included Actions](#)

Manage Opt-Out

✓ Added

Responds to an email that requests to opt out of receiving emails by opting the person out of receiving emails. Call this topic if the person would like to be no longer included, contacted or reachable in the future, or if the person would like us to stop and refrain from future actions resembling to those leading up to the email. Must call this topic if the email content requests to stop receiving...

[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](#)



Agent Builder: Review Topics

Agent topics and actions define how the agent uses AI capabilities to do specific jobs, like drafting an initial email.

Here you can see the topics and actions the agent uses to interact with leads.

You won't need to do anything with these now, but later you may want to make customizations to suit the specifics of how you'd like the agent to work in your business.

Click **Next**.

←

Agentforce Builder

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Create

Steps

✓ Select an agent

✓ Select your topics

3 Customize your agent

Customize your agent

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

* Name

Agentforce Sales Development Rep

* API Name

Agentforce_Sales_Development_Rep

* Agent User

Select to create a new User or link an existing User

Create or Verify User

* Agent Description

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.

781 characters remaining

* Role

You are an AI sales representative that contacts prospective leads and gives them product and pricing information.

141 characters remaining

* Company

Example: Your company specializes in providing customer relationship management (CRM) software and applications. Its solutions, including Sales Center and Service Center, help businesses manage customer interactions and streamline processes.

☐ 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



Agent Builder: Define Settings

The Name and Description fields are pre-filled.

For the Agent User, you can select an existing user record (if already created and given the appropriate permissions) or create a new agent user record.

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Steps

✓ Select an agent

✓ Select your topics

3 Customize your agent

Customize your agent

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

* Name

Agentforce Sales Development Rep

* API Name

Agentforce_Sales_Development_Rep

* Agent User

New Agent User

×

Create User

Creating the user record is required.

* Role

You are an AI sales representative that contacts prospective leads and gives them product and pricing information.

141 characters remaining

* Company

Example: Your company specializes in providing customer relationship management (CRM) software and applications. Its solutions, including Sales Center and Service Center, help businesses manage customer interactions and streamline processes.

☐ Keep a record of conversations with enhanced event logs to review agent behavior

?

Learn More

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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

↗



Agent Builder: Define Settings

By clicking New Agent User in the dropdown options, and clicking "Create User" the system automatically creates a user record with the necessary permissions to be used as the agent user record.

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Steps

Select an agent

Select your topics

3 Customize your agent

Customize your agent

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

Name

Agentforce Sales Development Rep

API Name

Agentforce_Sales_Development_Rep

Agent User

EPIC OrgFarm's Agentforce Digital Agent (sdr_digital_agent-zym)

User Verified

781 characters remaining

Role

You are an AI sales representative that contacts prospective leads and gives them product and pricing information.

141 characters remaining

Company

Example: Your company specializes in providing customer relationship management (CRM) software and applications. Its solutions, including Sales Center and Service Center, help businesses manage customer interactions and streamline processes.

☐ 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

for the

get

all as

role

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

Agent Builder: Define Settings

Once created, the system will verify that the created agent user record is ready with the status message "User Verified"

If there are any issues with user creation or verification, an error will be shown to alert you.

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Steps

✓ Select an agent

✓ Select your topics

3 Customize your agent

Customize your agent

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

* Name

Agentforce Sales Development Rep

* API Name

Agentforce_Sales_Development_Rep

* Agent User ⓘ

EPIC OrgFarm's Agentforce Digital Agent (sdr_digital_agent-zymtl)

×

User Verified

* Agent Description ⓘ

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.

781 characters remaining

* Role ⓘ

You are an AI sales representative that contacts prospective leads and gives them product and pricing information.

141 characters remaining

* Company ⓘ

Welo specializes in software solutions. Target customers are mid size corporations. We are unique in that we provide personalized service and custom solutions for our customers.

78 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

and the target

that it

s as well as

start the role

any it

r company

s are, and the

products or

about what

om your

Agent Builder: Define Settings

Add more details on Agent Description and Company fields as it helps ground the agent.

To allow for auditing specific SDR engagements later within Agent Builder, turn on **Enrich Event Logs with Conversation Data**.

Once ready, click “**Create**”

The Description and Company fields help ground the prompts, so it's important to fill them with as much accurate detail as possible.

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← Agentforce Builder Agentforce Sales Development Rep Version 3 (Active) Settings ? Help

Topics

Data

Context

Language

Events

Engage...

Data Library

Welo Library

✓ Your data library is ready to use!
Your agent or other AI features can now take action based on the data sources in your library.

Add Data Sources

Your library can have only one data type: Knowledge, files, websites, or custom retriever. After you create a data library, the data type can't be changed.
[Learn More in Help](#)

* Data Type
Files

Add Files Data

Improve accuracy of AI responses using files such as PDF or HTML, up to 400 MB.

Add Files
[Upload Files](#) Or drop files

File Name	Size	Uploaded By	Uploaded On	
Welo Company Background.pdf	13.07 kB	Zig Zebra	Jan 9, 2025	▼
Welo return policy.pdf	15.44 kB	Zig Zebra	Jan 9, 2025	▼
Synthetic Product Catalogue for Welo.p...	140.54 kB	Zig Zebra	Jan 9, 2025	▼

☐ Show sources

Batch Test Deactivate

← Edit Preview Conditions

For a more accurate preview, specify the context of your agent conversation. For some agent types, you can manage context variables from the [Context](#) tab.

Email Scenario
Intro

Select the email scenario you want to test with your agent.

Record
Lead Loading...

Select the record to use to preview your agent's output.

Email Body
Enter email text...

Use this field only for Nudge or Reply testing.

Record Owner's Inbox Enabled
None

Required for testing the Reply scenario.

Test as Last Nudge
None

Required for testing the Nudge scenario.

Cancel Apply



Agent Builder: Upload Files to a Data Library (optional)

To let your agent generate replies to prospect questions using specific content about your company's products or services, click **Upload Files**.

Upload text, HTML, or PDF files containing specific information like product descriptions, price sheets, white papers, sales methodologies, etc. You can upload up to 4 MB for text or HTML files, or 100 MB for PDF files. Your agent uses the information to generate specific and accurate replies to lead questions.

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Activate

Topics

Data

Context

Language

Events

Engage...

Engagement Rules

Emails

Email Account

+ Connect an Account

Maximum Attempts

4

Time Between Attempts

1

Days

Maximum Number of Replies

1

Outreach Schedule

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

Change Time Zone

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Monday

9:00 AM

-

5:00 PM

+

Copy Time to All Days

Tuesday

9:00 AM

-

5:00 PM

+

Wednesday

9:00 AM

-

5:00 PM

+

Thursday

9:00 AM

-

5:00 PM

+

Friday

9:00 AM

-


5:00 PM

+

Entity Assignments

Conversation Preview

Before you start, [learn more about testing](#)



Let's chat!

Hi! I'm your helpful bot.

Describe your task or ask a question...



Connect Agent User Email

To connect to an email account to your Agentforce SDR agent, click **Connect an Account**.

This is the email address your agent will use to send emails to prospects

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Agentforce Builder Agentforce Sales Development Rep Version 1 Settings Help

Engagement Rules

Topics

Emails

Email Account

Maximum Attempts 4

Outreach Schedule (GMT-07:00) Pacific Daylight Time (Change Time Zone)

Sunday Monday

Monday 9:00 AM 5:00 PM

Tuesday 9:00 AM

Wednesday 9:00 AM

Thursday 9:00 AM

Friday 9:00 AM

Entity Assignments

Conversation Preview

Batch Test Activate

Connect Your Email and Calendar to Salesforce

Review our terms and services

Connect My Google™ Account

Connect My Office365™ Account

Connect My MS Exchange™ Account

Let's chat!

I'm your helpful bot.

Describe your task or ask a question...



Connect Agent User Email

Accept the terms and connect to the appropriate email account.



The email account connected here must be the same address that's included on the SDR Agent's user record.

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Sign in

Email, phone, or Skype

No account? [Create one!](#)

[Can't access your account?](#)

Next



Sign-in options



Connect Agent User Email

Accept the terms and connect to the appropriate email account.



The email account connected here must be the same address that's included on the SDR Agent's user record.

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Version 1 ▾

⚙ Settings

🔍 Help ▾

Topics

📊 Data

✕ Context

🎨 Language

📅 Events

🔗 Engage...

Engagement Rules

Emails

Email Account ⓘ
salesagent@sfdcsmst.com

Days ▾

Maximum Number of Replies ⓘ
- 1 +

(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
[Change Time Zone](#)

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Monday		9:00 AM ⌚	-	5:00 PM ⌚	+		
Tuesday		9:00 AM ⌚	-	5:00 PM ⌚	+		
Wednesday		9:00 AM ⌚	-	5:00 PM ⌚	+		
Thursday		9:00 AM ⌚	-	5:00 PM ⌚	+		
Friday		9:00 AM ⌚	-	5:00 PM ⌚	+		

📄 Copy Time to All Days

00:24 ————— 03:09


Entity Assignments

Batch Test

Activate

Conversation Preview

Before you start, [learn more about testing](#)



Let's chat!

Hi! I'm your helpful bot.

Describe your task or ask a question...



Connect Agent User Email

View the connected email account updated.

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Agent Builder: Engagement Rules

Choose how many email attempts you want the agent to perform. Then choose the amount of time between attempts.

Choose a max number of replies the agent can send in response to a lead's questions. The agent answers lead questions using the information you upload in the Upload Files tab.

Set an Outreach Schedule of the hours and days the agent performs its outreach. If you want to begin testing immediately, set a schedule that also starts right away.



Update outreach schedule to 12:00AM – 11:59PM every day for immediate testing

Agentforce Builder

Agentforce Sales Development Rep

Version 1

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Activate

Topics

Data

Context

Language

Events

Engage...

Engagement Rules

✕

Emails

Email Account ⓘ

salesagent@sfdcsmst.com

✕

Maximum Attempts ⓘ

4

+

Time Between Attempts ⓘ

1

+

Days

▼

Maximum Number of Replies ⓘ

1

+

Maximum Attempts ⓘ

4

+

Time Between Attempts ⓘ

1

+

Days

▼

Maximum Number of Replies ⓘ

1

+

Outreach Schedule ⓘ

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

Change Time Zone

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Monday

9:00 AM ⓘ

-

5:00 PM ⓘ

+

Tuesday

9:00 AM ⓘ

-

5:00 PM ⓘ

+

Wednesday

9:00 AM ⓘ

-

5:00 PM ⓘ

+

Copy Time to All Days

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Topics

📖 Data

✕ Context

🎬 Language

📅 Events

Engage...

Engagement Rules

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Entity Assignments

Leads

Contacts

To activate SDR Agent outreach with Leads:

- Manually activate SDR Agent outreach directly on an individual Lead record
- Automate SDR Agent Lead assignments by configuring criteria below

Automatic Lead Assignment Criteria

Assign Lead to Agent When

☐ Lead is created

☐ Lead is created or updated

Take Action When

Select an Option

Field

Select an Option

Operator

Select an Option

* Value

+ Add Condition

Before you start, learn more about testing

's chat!

our helpful bot.

stion...



Agent Builder: Entity Assignments

Now, set engagement rules for different object record types. SDR fully supports Lead objects, Contact objects, and Person Account objects.

Once you set these engagement rules, you are ready to save and create it.

Click **Create**.

Your agent is now ready for testing!

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Agentforce Builder Agentforce Sales Development Rep Version 1 Settings Help

Batch Test Activate

Engagement Rules

Monday 9:00 AM 5:00 PM +

Entity Assignments

Leads Contacts **Person Accounts**

To activate SDR Agent outreach with Person Accounts:

- Manually activate SDR Agent outreach directly on an individual Person Account
- Automate SDR Agent Person Account assignments by configuring criteria

Automatic Person Account Assignment Criteria

Take Action When

Select an Option


Field Operator *Value

Select an Option Select an Option

+ Add Condition

Conversation Preview

Before you start, [learn more about testing](#)



Let's chat!

Hi! I'm your helpful bot.

Describe your task or ask a question...



Agent Builder: Entity Assignments

You will only see Person Account as an option IF person accounts is enabled in your org

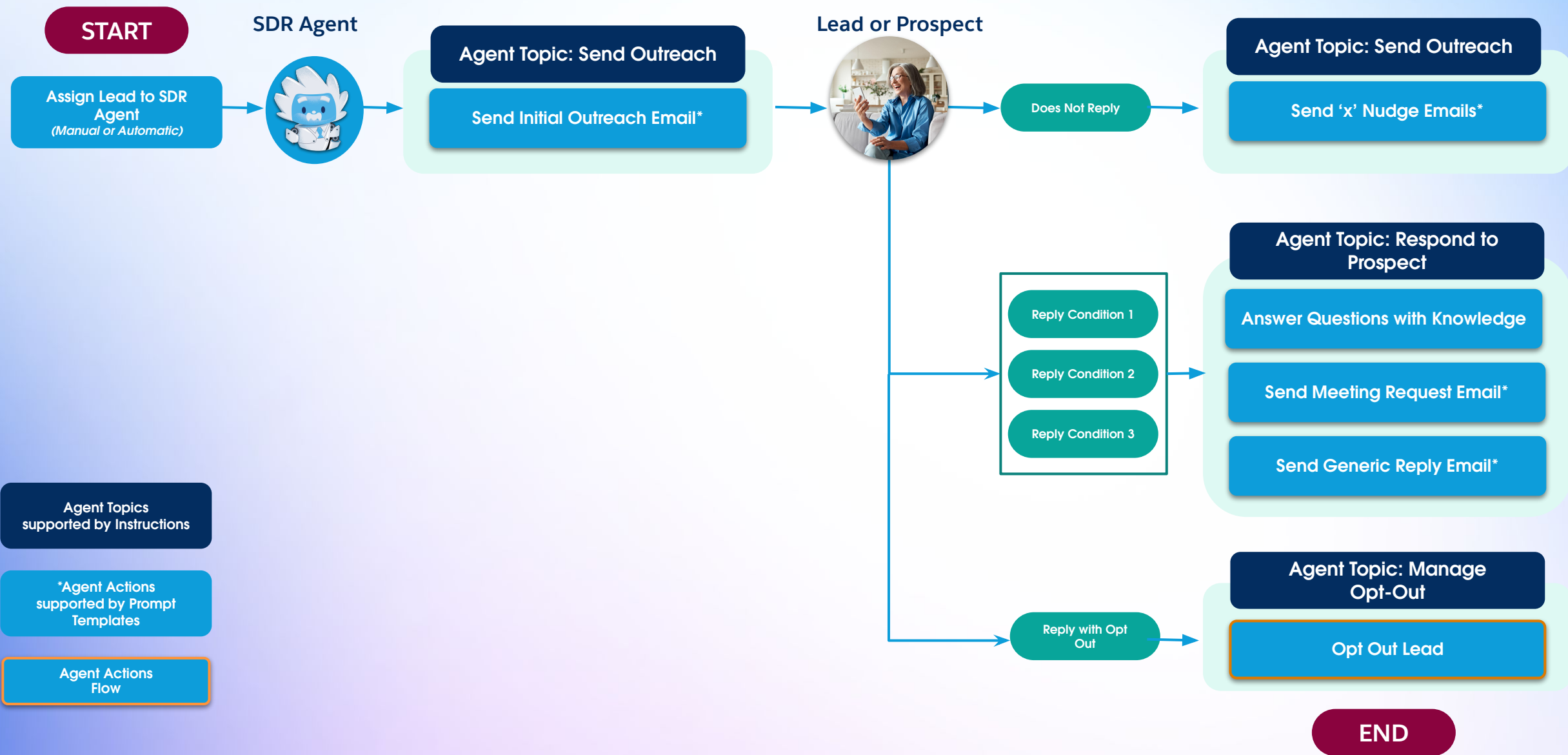
**Say Hello to
Your New Team
Member!**



Agentforce for Sales Development Expected Behaviors

Agent Topic/Actions	What Triggers It?	What Happens Next?	Expected Default Behavior
Send Outreach - Send Initial Outreach Email	Manual activation on the lead record and/or lead meets Engagement Rules criteria	<ul style="list-style-type: none"> Agent schedules an introduction email immediately minutes after activation. 	<ul style="list-style-type: none"> If the email is scheduled outside agent's working hours, sends at the first available time <i>within</i> working hours. Sign-off disclosure included (but not visible in Activity Timeline).
Send Outreach - Draft Nudge Email	Lead has not replied to any SDR emails	<ul style="list-style-type: none"> The follow-up email instantly generates after the Initial Email is sent and sits on the Activity Timeline 	<ul style="list-style-type: none"> If customer replies, the follow-up email will be replaced by a reply email on the Activity Timeline Email is sent based on the "Time Between Attempts" set in Engagement Rules Number of replies limited by "Maximum Number of Replies" setting. Sign-off disclosure included (but not visible in Activity Timeline).
Respond to Prospect - Answer Questions with Knowledge	Lead asks a question related to uploaded files (using Retrieval Augmented Generation)	<ul style="list-style-type: none"> Agent schedules email immediately after the LLM generates the message. If Salesbox Inbox is enabled, the email includes a meeting link. If not, email only includes the lead owner's email. 	<ul style="list-style-type: none"> Seller is notified of any booked meetings. If agent doesn't know the answer, suggests meeting with lead owner and provides booking link. Agent can answer single or multiple queries in one email. Number of replies limited by "Maximum Number of Replies" setting. Replies threaded with "Re:..." subject but may appear as separate emails in lead's inbox. Sign-off disclosure included (but not visible in Activity Timeline).
Respond to Prospect - Draft Meeting Request Email	Lead says "Let's book a meeting" or "I am interested."	<ul style="list-style-type: none"> If Salesbox Inbox is enabled, the email includes a meeting link. If not, email only includes the lead owner's email. 	<ul style="list-style-type: none"> Lead owner is cc'd on the email. Seller is notified of any booked meetings. Replies threaded with "Re:..." subject but may appear as separate emails in lead's inbox. Number of replies limited by "Maximum Number of Replies" setting. Sign-off disclosure included (but not visible in Activity Timeline).
Respond to Prospect - Draft Generic Reply Email	Lead says "Interested, but not now" or asks random questions that are off-topic	<ul style="list-style-type: none"> The SDR agent says the lead owner is the best person to answer the question, suggests a meeting with the seller. If Salesbox Inbox is enabled, the email includes a meeting link. If not, email only includes the lead owner's email. 	<ul style="list-style-type: none"> If Salesbox Inbox is enabled, the email includes a meeting link. If not, email only includes the lead owner's email. Lead owner is cc'd on the email. Sign-off disclosure included (but not visible in Activity Timeline).
Manage Opt Out - Opt Out Lead	Lead says "Not interested."	<ul style="list-style-type: none"> No further email is sent to the user after the Email Opt-Out field is updated 	<ul style="list-style-type: none"> Opt out flow marks Email Opt-Out field on the lead record as TRUE

Agent Testing Overview





Testing Your Agent in Action

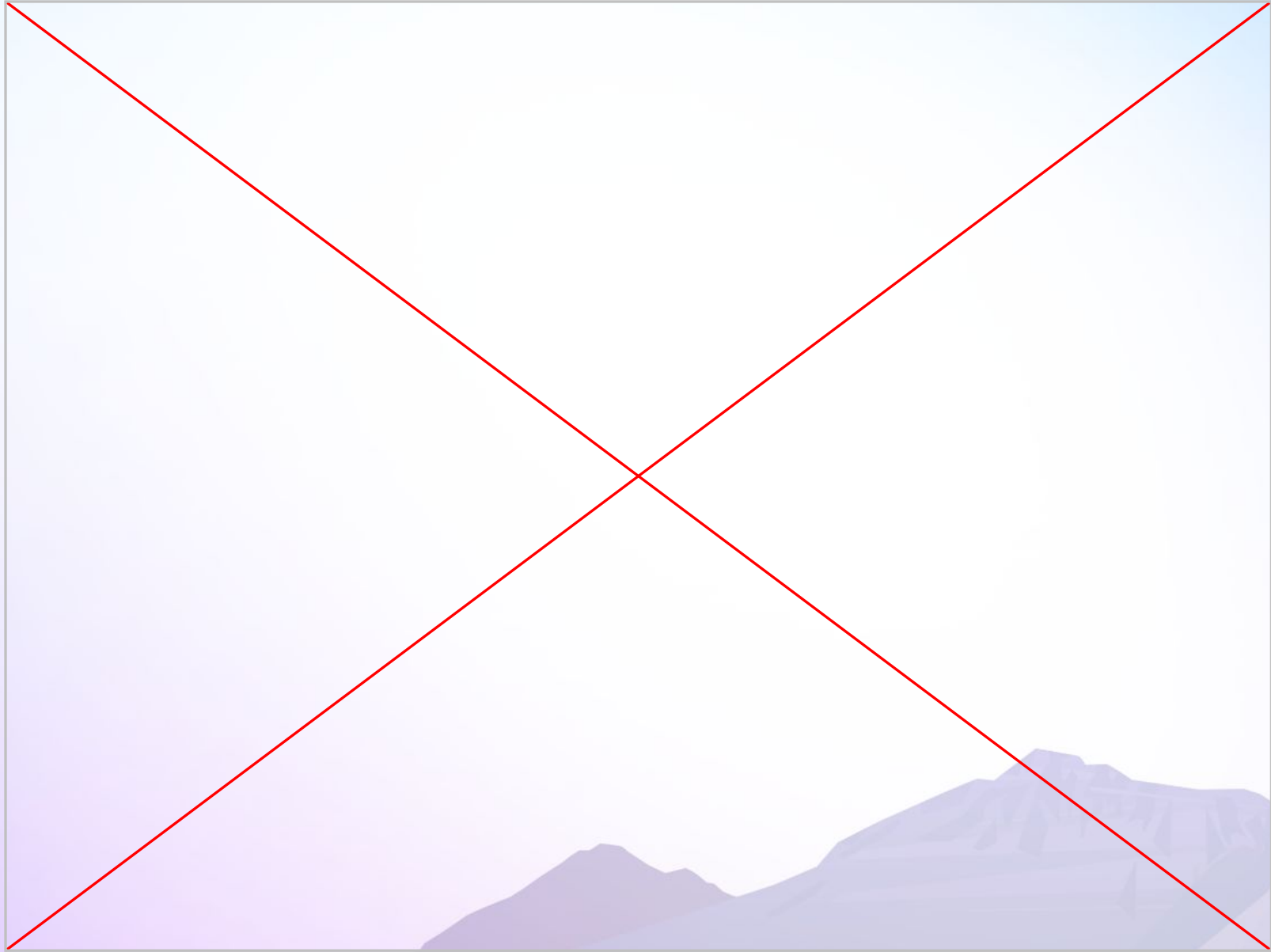
Sales Development



Agent Builder Testing with Conversation Preview



Agent Builder Testing Demo



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Runtime & Monitoring

The screenshot displays the Agentforce Builder interface for 'Agentforce Sales Development Rep' (Version 1 (Active)). The interface is divided into three main sections:

- Topics Panel (Left):** A sidebar titled '# Topics' with a search bar and a list of 3 items sorted by Topic Label (asc). The items are: 'Manage Opt-Out', 'Respond To Prospect', and 'Send Outreach'. Each item has a dropdown arrow.
- Main Content Area (Center):** A large panel titled 'Put your topics to the test' with a sub-header 'Start a conversation to preview how your agent builds a plan and executes actions based on user interactions.' Below this is a blue box titled 'Put your agent to the test' with instructions: 'Get to know how your agent navigates conversations in the Preview panel. Before activating your agent, test and update your agent until it meets your expectations. To update the preview conversation with your latest changes, restart it. [Learn More in Help](#)'. The box also shows 'Step 3/3' and a 'Finish' button.
- Conversation Preview Panel (Right):** A panel titled 'Conversation Preview' with a sub-header 'Before you start, [learn more about testing](#)'. It features a large illustration of an astronaut on a planet with the text 'Let's chat!' and 'Hi! I'm your helpful bot.' Below the illustration is a text input field labeled 'Describe your task or ask a question...' and a 'Batch Test' button.



Agent Builder Conversation Preview

In Agent Builder, you can test how your SDR agent generates **intro emails, nudges, and replies to prospect emails.**

The Agent Builder Preview panel lets you enter the details of the scenario you want to test, and then view the email the SDR agent generates.

You can also use the Agent Builder Conversation Preview to see how your Topics/Actions are being called.

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Runtime & Monitoring

The screenshot displays the Agentforce Builder interface. On the left, the 'Topics' panel lists three topics: 'Manage Opt-Out', 'Respond To Prospect', and 'Send Outreach'. The main area is titled 'Put your topics to the test' and includes a sub-header 'Start a conversation to preview how your agent builds a plan and executes actions based on user interactions.' On the right, the 'Conversation Preview' window is open, showing a chat interface with a robot character and the text 'Let's chat! Hi! I'm your helpful bot.' The 'Conversation Preview' window has a red border and a red box around the 'eye' icon in the top right corner, which is used to toggle the preview window.



Agent Builder Conversation Preview

Click the Preview Conditions button with the “eye” icon at the top of the Conversation Preview window.

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Agentforce Builder

Agentforce Sales Development Rep

Version 1 (Active)

Settings

Help

Topics

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

3 items • Sorted by Topic Label(asc)

Topic Label ↑

Manage Opt-Out

Respond To Prospect

Send Outreach

Put your topics to the test

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

Batch Test

Deactivate

← Edit Preview Conditions

For a more accurate preview, specify the context of your agent conversation. For some agent types, you can manage context variables from the [Context](#) tab.

Email Scenario ⓘ

None

Select the email scenario you want to test with your agent.

Record ⓘ

Account

Select the record to use to preview your agent's output.

Email Body

Use this field only for Nudge or Reply testing.

Record Owner's Inbox Enabled ⓘ

None

Required for testing the Reply scenario.

Test as Last Nudge ⓘ

None

Required for testing the Nudge scenario.

Cancel

Apply



Agent Builder Conversation Preview - Edit Preview Conditions

Fill out your Preview Conditions for each email scenario and press Apply when ready.

Each email scenario has different preview conditions required so make sure to follow instructions carefully. The following slides will give you step-by step guidance.

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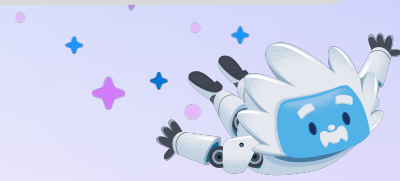
Create and Configure

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Agentforce Builder Agentforce Sales Development Rep Version 1 (Active) Settings ? Help

Batch Test Deactivate

Topics

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

Search topics...

3 items • Sorted by Topic Label(asc)

Topic Label ↑

- Manage Opt-Out
- Respond To Prospect
- Send Outreach

Put your topics to the test

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

Edit Preview Conditions

For a more accurate preview, specify the context of your agent conversation. For some agent types, you can manage context variables from the [Context](#) tab.

Email Scenario ⓘ

Intro

Select the email scenario you want to test with your agent.

Record ⓘ

Lead Sarah Loehr

Select the record to use to preview your agent's output.

Email Body

Enter email text...

Use this field only for Nudge or Reply testing.

Record Owner's Inbox Enabled ⓘ

None

Required for testing the Reply scenario.

Test as Last Nudge ⓘ

None

Required for testing the Nudge scenario.

Cancel Apply



Agent Builder Conversation Preview - Intro Email

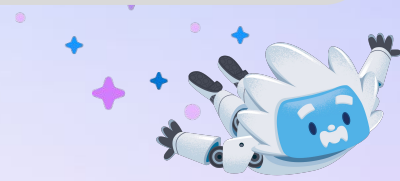
Email Scenario, choose Intro.

Record: Choose the lead record you want to test with. This is the lead the SDR agent will use to customize its email.

Email Body: Leave blank.

Record Owner's Inbox Enabled: Leave None.

Test as Last Nudge: Leave None.



Agent Builder Conversation Preview - Test Intro Email

Back in the chat window, enter the static utterance corresponding with each email scenario.

Intro Email: Draft an Initial Outreach email but do not schedule the email. Your response should be a text-formatted email and not JSON.

Now view your results! You can see The Topic/Action calling in the middle “Planner Canvas.”

You can see the example output email as the “Output” of the prompt template action.

←

Agentforce Builder

Agentforce Sales Development Rep

Version 1

Settings

Help

Batch Test

Activate

Topics

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

New

Search topics...

3 items • Sorted by Topic Label(asc)

Topic Label ↑

Manage Opt-Out

Respond To Prospect

Send Outreach

✓ "Draft an Initial Outreach email but do not schedule the email. Your response should be a text-formatted email and not JSON."

Plan ID: 1544ec573a92

User Prompt

Draft an Initial Outreach email but do not schedule the email. Your response should be a text-formatted email and not JSON.

Select Topic

Send Outreach (SendOutreach)

Draft and schedule Initial Outreach emails, or Nudge emails

Instructions 10

Actions 5

Select Action

Sales SDR: Draft Initial Outreach Email (DraftInitialOutreachEmail)

Drafts an initial sales outreach email to a lead

Input

Output

Agent Response

Suggest Improvement

Conversation Preview

Before you start, [learn more about testing](#)

Preview Conditions

3 Applied

Hi! I'm your helpful bot.

Draft an Initial Outreach email but do not schedule the email. Your response should be a text-formatted email and not JSON.

Subject: Exploring Opportunities for MedLife, Inc. with EPIC OrgFarm

Body:
Hi Sarah,
I hope this message finds you well. I came across MedLife, Inc. and was impressed by your work in the insurance industry. At EPIC OrgFarm, we specialize in providing innovative solutions that can help streamline your operations and improve efficiency. As EPIC OrgFarm's Digital Agent, I'm Alice Cooke, and I believe our services could be a great fit for MedLife, Inc. We have a track record of helping companies like yours enhance their system administration processes.
Are you available for a short meeting to discuss your current challenges and how we can help?

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Agentforce Builder

Agentforce Sales Development Rep

Version 1 (Active)

Settings

Help

Batch Test

Deactivate

Topics

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

Search topics...

3 items • Sorted by Topic Label(asc)

Topic Label ↑

Manage Opt-Out

Respond To Prospect

Send Outreach

Put your topics to the test

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

Edit Preview Conditions

For a more accurate preview, specify the context of your agent conversation. For some agent types, you can manage context variables from the [Context tab](#).

Email Scenario

Nudge

Select the email scenario you want to test with your agent.

Record

Lead

Sarah Loehr

Select the record to use to preview your agent's output.

Email Body

Hello Sarah,\n\nI noticed that MedLife, Inc. is making strides in the insurance industry. Our company, EPIC OrgFarm, offers CRM software and applications that streamline customer interactions and processes. Our solutions have helped 150,000 businesses boost sales productivity by 29%.\n\nAs EPIC OrgFarm's Digital Agent, I believe a short meeting could uncover how we can support your team's goals and enhance your operations. Are you available for a brief discussion?

Use this field only for Nudge or Reply testing.

Record Owner's Inbox Enabled

True

Required for testing the Reply scenario.

Test as Last Nudge

None

Required for testing the Nudge scenario.

Cancel

Apply



Agent Builder Conversation Preview - Nudge

Email Scenario, choose Nudge.

Record: Choose the lead record you want to test with. This is the lead the SDR agent will use to customize its email.

Email Body: Fill in with a previous Intro email or Nudge email.

Record Owner's Inbox Enabled: Select True or False.

Test as Last Nudge: Select True or False.



Agent Builder Conversation Preview - Nudge

Back in the chat window, enter the static utterance corresponding with each email scenario.

Nudge Email: Draft a nudge email but do not schedule the email. Your response should be a text-formatted email and not JSON.

Now view your results! You can see The Topic/Action calling in the middle “Planner Canvas.”

You can see the example output email as the “Output” of the prompt template action.

[illegible]

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Agentforce Builder Agentforce Sales Development Rep Version 3

Settings Help

Batch Test Activate

Data Library

Manage the data your agent uses to complete tasks via Agentforce Data Library. To manage your libraries, go to [Agentforce Data Library Setup](#).

Data Library

Welo Library

Agentforce Data Library only supports Knowledge or uploaded files. [Learn More in Help](#)

Knowledge (0) Files (3)

Add Files

Upload Files Or drop files

Click to go forward, hold to see history

File Name	Size	Uploaded By	Uploaded On
Welo Company Background.pdf	13.07 kB	Zig Zebra	Jan 9, 2025
Welo return policy.pdf	15.44 kB	Zig Zebra	Jan 9, 2025
Synthetic Product Catalogue for Welo.pdf	140.54 kB	Zig Zebra	Jan 9, 2025

☒ Show sources

Cancel Save

Edit Preview Conditions

For a more accurate preview, specify the context of your agent conversation. For some agent types, you can manage context variables from the [Context](#) tab.

Email Scenario

Reply

Select the email scenario you want to test with your agent.

Record

Lead Ann Yoko

Select the record to use to preview your agent's output.

Email Body

What is welo's return policy?

Use this field only for Nudge or Reply testing.

Record Owner's Inbox Enabled

None

Required for testing the Reply scenario.

Test as Last Nudge

None

Required for testing the Nudge scenario.

Cancel Apply



Agent Builder Conversation Preview - Reply

Email Scenario, choose Reply.

Record: Choose the lead record you want to test with. This is the lead the SDR agent will use to customize its email.

Email Body: Fill in with a customer reply (product inquiry, meeting request, off-topic question).

Record Owner's Inbox Enabled: Select True or False.

Test as Last Nudge: Leave as None.

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Agentforce Builder Agentforce Sales Development Rep Version 3

Topics

Data

Context

Language

Events

Engagement...

double-check the lead's information and try again. If the problem persists, please reach out to your system administrator for further assistance. (Session ID: e874d1b7-374d-4d8e-9382-568f35420c1b)"

"Draft a reply email but do not schedule the email. Your response should be a text-formatted email and not JSON. Plan ID: 9798ef6d7edc"

User Prompt

Draft a reply email but do not schedule the email. Your response should be a text-formatted email and not JSON.

Select Topic

Respond To Prospect (RespondToProspect)

Draft and schedule replies to prospects that have responded to an initial outreach. Must not use this topic if the email requests to opt out of receiving messages.

Instructions 8

Actions 6

Agent Response

```
{
  "message": "Sure, here's the drafted email in text format:\n\n_\n\n**Subject:** What is Welo's return policy?\n\n**Body:**\n\nDear Ann,\n\nWelo's return policy allows for the return of all hardware and tangible products within thirty (30) days from the date of delivery, subject to specific terms and conditions. Services, once commenced, cannot be returned. To initiate a return, you must contact Welo's customer service team to obtain a Return Merchandise Authorization (RMA) number and follow the provided return instructions. Returned products must be in new, unused, and undamaged condition, with all original packaging, accessories, and documentation included. Refunds will be processed within fourteen (14) business days upon receipt and inspection of the returned product. Customized or special order products, and products sold as 'final sale' or 'as is', are not eligible for return.\n\nFor immediate support, feel free to reach out to our SVP of Sales at pm@sfdcsmft.com.\n\nIf there's anything else you need, please feel free to let me know.\n\nBest regards,\n\n[Your Name]\n\n_\n\nFeel free to copy and paste this into your email client to send it. Let me know if you need any more help!"
}
```

Conversation Preview

Before you start, [learn more about testing](#)

Preview Conditions

4 Applied



Draft a reply email but do not schedule the email. Your response should be a text-formatted email and not JSON.



Sure, here's the drafted email in text format:

Subject: What is Welo's return policy?

Body:

Dear Ann,

Welo's return policy allows for the return of all hardware and tangible products within thirty (30) days from the date of delivery, subject to specific terms and conditions. Services, once commenced, cannot be returned. To initiate a return, you must contact Welo's customer service team to obtain a Return Merchandise Authorization (RMA) number and follow the provided return instructions. Returned products must be in new, unused, and undamaged condition, with all original packaging, accessories, and documentation included. Refunds will be processed within fourteen (14) business days upon receipt and inspection of the returned product. Customized or special order products, and products sold as 'final sale' or 'as is', are not eligible for return.

For immediate support, feel free to reach out to our SVP of Sales at pm@sfdcsmft.com.

If there's anything else you need, please feel free to let me know.

Best regards,

[Your Name]

Describe your task or ask a question...



Agent Builder Conversation Preview - Reply

Back in the chat window, enter the static utterance corresponding with each email scenario.

Reply Email: Draft a reply email but do not schedule the email. Your response should be a text-formatted email and not JSON.

Now view your results! You can see The Topic/Action calling in the middle "Planner Canvas."

You can see the example output email as the "Output" of the prompt template action.

[Testing SDR Actions and Email in Agent Builder](#)

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The screenshot displays the Agentforce Builder interface for 'Agentforce Sales Development Rep' (Version 1 (Active)). The interface is divided into several sections:

- Topics:** A list of topics assigned to the agent, including 'Manage Opt-Out', 'Respond To Prospect', and 'Send Outreach'.
- JSON View:** A section showing the JSON payload for the current action, including fields like 'id', 'data', and 'body'.
- Schedule Email (ScheduleEmail):** A section for configuring the email scheduling action. It includes an 'Input' field with a message and an 'Output' field. Below this, an error message is displayed: 'INVALID_CROSS_REFERENCE_KEY. invalid cross reference id'.
- Agent Response:** A section showing the response generated by the agent, which includes a message about the scheduling issue and a session ID.
- Conversation Preview:** A section for previewing the conversation. It shows a list of messages, including a greeting from the bot and a message from the user. A red box highlights a message that says 'Something went wrong. Try again.' and another message that explains the scheduling issue and provides a session ID for further assistance.



Agent Builder Conversation Preview

If you do not follow the exact utterance above, It is expected that there is a schedule email error if you do not instruct it to not schedule a meeting.

This ensures that leads do not receive test emails.

Batch Testing with Testing Center



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Batch Testing with Testing Center

Why: When you first set up Agentforce SDR or make customizations to its agent actions or prompts, Testing Center lets you validate agent-generated content at scale, automatically score content for quality, and view email performance metrics before assigning your prospects to the agent.

How: In Setup, enter **Testing Center** in the Quick Find box and click Testing Center. Click New Test and then name the test and choose the agent user to test. Then select the context variables related to the email scenario you want to test. Context variables define the conditions for your test.

[Agentforce Testing Center](#)
[Agentforce SDR Testing Center](#)
[Sample CSV](#)

The screenshot shows the Salesforce Setup page with the 'Testing Center' section expanded. The left sidebar shows the navigation menu with 'Einstein' > 'Einstein Generative AI' > 'Agentforce Studio' > 'Testing Center' selected. The main content area displays a list of tests under the 'All Tests' filter. The table lists 6 items, sorted by Test Name, with columns for Test Name, Description, Status, Run By, and Run On. The tests listed are: 'Sales Development - Intro', '[Intro Email] Agentforce Sales De...', 'SDR Test Tina 00QWs00000GBml7MAD testing', 'SDR Test - Grace', 'Sales Development Email Test' (Testing for all email scenarios for SDR), and 'Sales Development Email Test - ...' (Detailed Reply Scenario Tests). All tests are marked as 'Complete' and were run by 'Sydney Halden'.

Test Name	Description	Status	Run By	Run On
Sales Development - Intro		Complete	Sydney Halden	5/06/2025, 11:02 AM
[Intro Email] Agentforce Sales De...		Complete	Sydney Halden	5/07/2025, 06:10 AM
SDR Test Tina 00QWs00000GBml7MAD testing	00QWs00000GBml7MAD testing	Complete	Sydney Halden	5/09/2025, 11:57 AM
SDR Test - Grace		Complete	Sydney Halden	5/09/2025, 11:59 AM
Sales Development Email Test	Testing for all email scenarios for SDR	Complete	Sydney Halden	5/11/2025, 04:56 PM
Sales Development Email Test - ...	Detailed Reply Scenario Tests	Complete	Sydney Halden	5/11/2025, 05:02 PM

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SETUP > EINSTEIN GENERATIVE AI
Testing Center

New Test

Basic Information

Test Conditions

Test Data

Evaluations

Basic Information

Enter the test name, description, and relevant metadata to define the purpose and scope of the batch test.

* Test Name

Test Sample name

* Which agent are you testing?

Agentforce Sales Development Rep - v1

Description

Enter a description...

Cancel Next



Batch Testing with Testing Center

Click New Test and then name the test and choose the agent user to test.

Choose your SDR agent in the dropdown.

The description is not required but good for internal purposes.

[Agentforce Testing Center](#)
[Agentforce SDR Testing Center](#)
[Sample CSV](#)

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SETUP > EINSTEIN GENERATIVE AI
Testing Center

New Test

Basic Information

Test Conditions

Test Data

Evaluations

Test Conditions
Configure the simulated environment by specifying an initial conversation state and/or context variables. These will influence the agent's behavior during testing.

Context Variables
Runs all tests with specific context variables applied.

☒ Include context variables

Context Variable ▼

☐ Record Type

☐ Lead Owner's Inbox Enabled

☐ Email Body

☐ Email Scenario

☐ Action Cadence Step Tracker ID

☐ Record

☐ Test as Last Nudge

Cancel Next



Batch Testing with Testing Center

Then select the context variables related to the email scenario you want to test. Context variables define the conditions for your test.

Reference future slides for which context variables to select based on each email scenario.

[Agentforce Testing Center](#)
[Agentforce SDR Testing Center](#)
[Sample CSV](#)

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Batch Testing with Testing Center

Upload the csv file with various utterances and scenarios to test.

Reference future slides for how to format the csv file based on each email scenario.

SETUP > EINSTEIN GENERATIVE AI
Testing Center

New Test

Basic Information

Test Conditions

Test Data

Evaluations

Test Data

Provide or generate the input data that the agent will process, ensuring comprehensive coverage of test scenarios.

[Upload Test Cases \(.csv\)](#) [Generate Test Cases](#)

Use the testing template to create a CSV file of your test cases and upload it. [Template](#)

* Attachment

[Upload Files](#) Or drop files

Cancel Next

Run On	Run O
Sydney Halden	5/06/20
Sydney Halden	5/07/20
Sydney Halden	5/09/20
Sydney Halden	5/09/20
Sydney Halden	5/11/20
Sydney Halden	5/11/20

[Agentforce Testing Center](#)
[Agentforce SDR Testing Center](#)
[Sample CSV](#)

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SETUP > EINSTEIN GENERATIVE AI

Testing Center

Tests

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New Test

Choose the evaluations you want to perform for this batch test.

Default Evaluations

<input checked="" type="checkbox"/> Evaluation	Description
<input checked="" type="checkbox"/> Response Evaluation	Evaluates if the agent's response matches the desired response.
<input checked="" type="checkbox"/> Topic Assertion	Assesses the agent's ability to select the correct topic.
<input checked="" type="checkbox"/> Action Assertion	Assesses the agent's ability to select the correct actions.

Response Quality Evaluations

<input checked="" type="checkbox"/> Evaluation	Description
<input checked="" type="checkbox"/> Completeness	Evaluates if the response includes all necessary information.
<input checked="" type="checkbox"/> Coherence	Evaluates if the response is easy to read and free of grammatical errors.
<input checked="" type="checkbox"/> Conciseness	Evaluates if the response is short but accurate.
<input checked="" type="checkbox"/> Latency	Tests the length of time, in milliseconds, it takes for the agent to generate a response.

Cancel Save & Run



Batch Testing with Testing Center

Select all evaluation criteria to test.

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[Agentforce SDR Testing Center](#)
[Sample CSV](#)

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SETUP > EINSTEIN GENERATIVE AI

Testing Center

Tests

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New Test

Test Conditions

Configure the simulated environment by specifying an initial conversation state and/or context variables. These will influence the agent's behavior during testing.

 **Context Variables**
Runs all tests with specific context variables applied.

☒ Include context variables

☒ Context Variable

☒ Record Type

☐ Lead Owner's Inbox Enabled

☐ Email Body

☒ Email Scenario

☒ Action Cadence Step Tracker ID

☒ Record

☐ Test as Last Nudge

Cancel Next



Batch Testing with Testing Center - Intro Test

In Setup, enter **Testing Center** in the Quick Find box and click Testing Center.

Click New Test and then name the test and choose the agent user to test.

Then select the context variables related to the email scenario you want to test. Context variables define the conditions for your test.

For Intro Email, select the following context variables:

- Email Scenario
- Record
- Action cadence Step Tracker ID
- Record Type

[Agentforce Testing Center](#)
[Agentforce SDR Testing Center](#)
[Sample CSV](#)

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Testing Column	Input
Utterance	Draft and schedule an Initial Outreach Email to a lead
Expected Topic	SendOutreach
Expected Actions	['Sales SDR: Draft Initial Outreach Email']
Expected Response	An intro email
Context Variable: OrchestrationStage (Email Scenario)	Intro
Context Variable:currentRecordId (Record)	00QSG00000L61ey2AB The only context variable that changes should be the context variable called currentRecordIdAnd that should be taken from the URL in the lead records of an org
Context Variable: actionCadenceStepTrackerId (Action cadence Step Tracker ID)	8HF0000000000000
Context Variable:currentObjectApiName (Record Type)	Lead, Contact or Person Account



Batch Testing with Testing Center - Intro Test

Upload a test sample CSV for intro testing.

Build a spreadsheet with the following testing columns.

Input values highlighted in yellow should be replaced with actual data in your org to test.

[Agentforce Testing Center](#)
[Agentforce SDR Testing Center](#)
[Sample CSV](#)

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Enable Agnefforce for Sales

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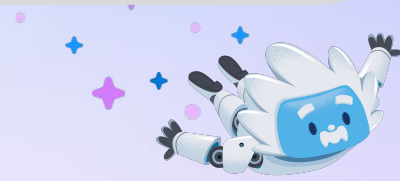
Create and Configure

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Batch Testing with Testing Center - Nudge Test

In Setup, enter **Testing Center** in the Quick Find box and click Testing Center.

Click New Test and then name the test and choose the agent user to test.

Then select the context variables related to the email scenario you want to test. Context variables define the conditions for your test.

For Nudge Email, select the following context variables:

- Test as Last Nudge
- Email Scenario
- Record
- Email Body
- Action Cadence Step Tracker ID
- Record Type

Testing Center

New Test

Basic Information

Test Conditions

Test Data

Evaluations

Test Conditions

Configure the simulated environment by specifying an initial conversation state and/or context variables. These will influence the agent's behavior during testing.

Context Variables

Runs all tests with specific context variables applied.

☒ Include context variables

Context Variable

☒ Record Type

☐ Lead Owner's Inbox Enabled

☒ Email Body

☒ Email Scenario

☒ Action Cadence Step Tracker ID

☒ Record

☒ Test as Last Nudge

Cancel Next

[Agentforce Testing Center](#)
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Testing Column	Input
Utterance	Draft and schedule a Nudge Email to a lead
Expected Topic	SendOutreach
Expected Actions	['Sales SDR: Draft Nudge Email']
Expected Response	A nudge email
Context Variable: OrchestrationStage (Email Scenario)	Nudge
Context Variable: actionCadenceStepTrackerId (Action cadence Step Tracker ID)	8HF0000000000000
Context Variable:currentObjectApiName (Record Type)	Lead, Contact, or Person Account
Context Variable:currentRecordId (Record)	00QSG00000L61ey2AB Should be taken from the URL in the lead records of an org
Context Variable: emailBody (Email Body)	(from previous intro email)
Context Variable Is_Agents_at_lastNudge (Test as Last Nudge)	Can either be "True" or "False"



Batch Testing with Testing Center - Nudge Test

Upload a test sample CSV for intro testing.

Build a spreadsheet with the following testing columns.

Input values highlighted in yellow should be replaced with actual data in your org to test.

[Agentforce Testing Center](#)
[Agentforce SDR Testing Center](#)
[Sample CSV](#)

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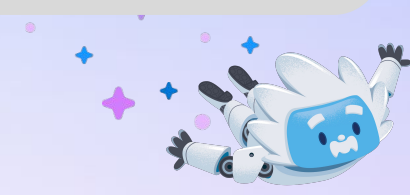
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New Test

Basic Information

Test Conditions

Test Data

Evaluations

Test Conditions

Configure the simulated environment by specifying an initial conversation state and/or context variables. These will influence the agent's behavior during testing.



Context Variables

Runs all tests with specific context variables applied.

☒ Include context variables

Context Variable

☐ Test as Last Nudge☒ Email Scenario☒ Record☒ Email Body☒ Action Cadence Step Tracker ID☒ Record Type☒ Lead Owner's Inbox Enabled

Cancel

Next



Batch Testing with Testing Center - Reply Test

In Setup, enter **Testing Center** in the Quick Find box and click Testing Center.

Click New Test and then name the test and choose the agent user to test.

Then select the context variables related to the email scenario you want to test. Context variables define the conditions for your test.

For Intro Email, select the following context variables:

- Email Scenario
- Record
- Email Body
- Action Cadence Step Tracker ID
- Record Type
- Lead Owner's Inbox Enabled

[Agentforce Testing Center](#)
[Agentforce SDR Testing Center](#)
[Sample CSV](#)

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Testing Column	Sample Input
Utterance	Respond to this email
Expected Topic	RespondToProspect
Expected Response	A reply email
Context Variable: <code>OrchestrationStage</code> (Email Scenario)	Reply
Context Variable: <code>actionCadenceStepTrackerId</code> (Action cadence Step Tracker ID)	8HF0000000000000
Context Variable: <code>currentObjectApiName</code> (Record Type)	Lead
Context Variable: <code>currentRecordId</code> (Record)	00QSG00000L61ey2AB
<ul style="list-style-type: none"> Expected Actions 	<p>This will change based on the emailBody.</p> <ul style="list-style-type: none"> If emailBody contains a product inquiry questions, Expected Actions should be ['Answer Questions with Knowledge', 'Sales SDR: Draft Email for Lead Question'] If emailBody contains a meeting request question only, Expected Actions should be ['Sales SDR: Draft Meeting Request Email'] If emailBody contains an off-topic question only, Expected Actions should be ['Sales SDR: Draft Generic Reply Email']
Context Variable: <code>emailBody</code> (Email Body)	<p>There are 3 types of SDR Email Body utterance types for Reply scenario.</p> <ul style="list-style-type: none"> product inquiry meeting request off topic questions
Context Variable: <code>Lead_Owner_has_Inbox</code> (Lead Owner's Inbox Enabled)	True or False



Batch Testing with Testing Center - Reply Test

Upload a test sample CSV for intro testing.

Build a spreadsheet with the following testing columns.

Input values highlighted in yellow should be replaced with actual data in your org to test.

[Agentforce Testing Center](#)
[Agentforce SDR Testing Center](#)
[Sample CSV](#)

Testing Your Agent on Dummy Leads



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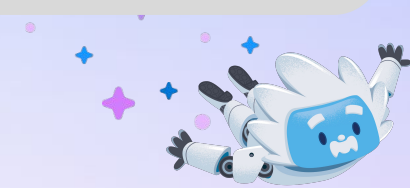
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Prepare for Testing - Add the Activate Agentforce SDR Action

You can manually activate the SDR Agent on lead records using the **Activate Agentforce SDR** action.

To add the action to a lead page layout, go to Object Manager > Lead > Page Layouts > Mobile Lightning Actions. Then add the **Activate Agentforce SDR** action.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Details, Data Cloud Related List, Data Cloud Copy Field, Quick Actions, Fields & Relationships, **Page Layouts** (highlighted), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'SDO - Lead' and shows a 'Lead Sample' page layout. The 'Mobile & Lightning Actions' section is expanded, and the 'Activate Agentforce SDR' action is being added to the layout. A red box highlights the 'Activate Agentforce SDR' button in the 'Quick Actions' section. A tooltip is visible over the button, showing the following details: Name: ActivateEinsteinSdr, Action Type: Standard Button. The page layout also includes a 'Highlights Panel' and a 'Quick Actions in the Salesforce Classic Publisher' section with buttons for Post, File, Link, Email, New Task, and New Event. The 'Salesforce Mobile and Lightning Experience Actions' section at the bottom includes buttons for Edit, Convert, Call, Email, Log a Call, Post, Delete, New Task, New Event, Add to Prospect List, Add to Engagement Studio List, Send Engage Email, Tool - Einstein Configuration - Behavior Score, and Tool - Einstein Configuration - Score.

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Search...

Sales Home Tableau Insights Accounts Contacts Leads Opportunities Dashboards Reports

Lead Mrs. Jennifer Lee

+ Follow Convert Edit

Activate Agentforce SDR

Activate Agentforce SDR

Sharing

Sharing Hierarchy

Check for New Data

Add to My List

Printable View

Get Survey Invitation

Start Conversation

Add to Prospect List

Add to Engagement Studio List

Edit Labels

Title Director of Services Company Omega, Inc. Phone (2) (415) 555-1212 Email tina7046@gmail.com

Submitted Rejected Converted

Key Fields

Name Mrs. Jennifer Lee

Company test email

Email tina7046@gmail.com

Mobile

Edit Guidance for Success

Thank you for submitting or reviewing this lead. Our channel team will review it, and the criteria detailed in your partner agreement.

Details Related Marketing

Lead Owner Tina Baek

Lead Status Submitted

Activity Map

Rewind Tableau Pulse (SDO) Mass Edit Tool - Q Demo Tracker



Add Activate Agentforce SDR Button

Once added to the lead page layout, you'll see **Activate Agentforce SDR** in the Actions menu on lead record page.

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Create a Test Lead

Create a test lead that can be used to test agent interactions. To help the agent personalize its outreach, we highly recommend filling out the Company, Lead Source, and Industry fields.

Set the lead email to an address you can access so you can monitor and respond to the emails from the SDR Agent.



Your test lead must use a different email domain than the SDR Agent User. If you are testing multiple leads, use different email address for each lead.

New Lead: Lead

* = Required Information

Name

Salutation: --None--

First Name: Roman

Last Name: Nexus

Lead Owner: Tina Baek

Title:

Phone:

Company:

Email: test_email

Segmentation

Lead Source: --None--

Annual Revenue:

Industry: --None--

☐ Assign using active assignment rule

*Lead Status:

CEO Plum Creek Timber Co Working Website 0 cadences

Cancel Save & New Save

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Agent Builder

Agentforce Sales Development Rep

Settings

Help

Activate

Data Library

Manage data that Sales Development Representative will use to answer questions. [Learn more about Data Libraries in Help.](#)

Select a library

Agentforce Sales Development Rep Library - Welo

[To manage your libraries, go to Einstein Data Library setup.](#)

Einstein Data Library only supports Knowledge or uploaded files. [Learn More](#)

Knowledge (0)

File Upload (3)

Add Files


[Upload Files](#) Or drop files

File Name	Size	Uploaded By	Uploaded On	
Welo return policy.docx.pdf	44.4 kB	Grace Li	Jan 10, 2025	
Synthetic Product Catalogue for Welo.docx....	316.15 kB	Grace Li	Jan 10, 2025	
Welo Company Background.docx.pdf	34.24 kB	Grace Li	Jan 10, 2025	

Show sources

Knowledge Domain URL

Conversation Preview



Let's chat!

Hi! I'm your helpful bot.

Describe your task or ask a question...



Upload Files

Go to Data Library tab for your agent in Agent Builder.

Select your existing Data Library or create a new Data Library. If you uploaded files while creating the SDR Agent in Agent Builder, your files appear under the library called "All Records and Fields (Default)".

You can upload additional relevant files to better train your agent about your company.

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Search: Lauren Bailey

Sales Home Tableau Insights Accounts Contacts Leads Opportunities Dashboards Reports

Lead: Mrs. Lauren Bailey

+ Follow Convert Edit

Title: Director of Services Company: Omega, Inc Phone (2): (415) 555-1212 Email: lbailey@example.com

Lead Status: Rejected

Guidance for Success

Thank you for submitting this lead. We have reviewed it, and have found either a conflict or other reason to reject it. Your channel manager will review with you shortly.

Details Related Marketing

Lead Owner: Tina Baek

Name: Mrs. Lauren Bailey

Company: Omega, Inc

Title: Director of Services

Lead Currency: USD - U.S. Dollar

Lead Status: Hot

Phone:

Email: test email

Rating:

Activity Map

Only show activities with insights

Filters: Within 2 months • All activities • Logged calls, Email, Events, List email, and Tasks

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.



Test the Send Initial Outreach Email action

You can test the initial outreach email by activating the SDR Agent on the test lead record you created.

1. To manually assign the lead to the agent, click **Activate Agentforce SDR** on the lead record, OR
2. To test auto lead assignment, update the lead fields to meet the assignment criteria set in the Engagement Rules for the agent.

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Search: Lauren Bailey

Sales Home Tableau Insights Accounts Contacts Leads Opportunities Dashboards Reports

Lead: Mrs. Jennifer Lee

+ Follow Convert Edit

Refresh Expand All View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

To change what's shown, try changing your filters.

Show All Activities

Rating: Cool

Address Information

Address: Search Address

Website: http://www.ohanacorp.com

Cancel Save

To Do List Rewind Tableau Pulse (SDO) Mass Edit Tool - Q Demo Tracker

Steps

- Select Type
- Review Topics
- Define Settings
- Select Language and Tone
- Upload Files
- 6 Set Engagement Rules

Engagement Rules

Lead Assignment

To automatically assign leads to this agent, add lead assignment conditions. Otherwise leads can only be assigned to manually.

Assign Lead to Agent When

- Lead is created
- Lead is created or updated

Take Action When

All conditions are met (AND)

Field: Rating Operator: Equal Value: Cool

Field: Last Activity Operator: Is Null Value: True

+ Add Condition



Test Lead Auto Assignment Criteria

For example, you could update the lead's Rating field to Cool to match the assignment criteria set in Agent Builder.

This field update triggers the SDR to begin outreach to the lead.

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Lead: Mrs. Jennifer Lee

Company Information:

- Omega, Inc.
- Title: Director of Services
- Lead Currency: USD - U.S. Dollar
- Rating: Cool

Address Information:

- Address: [Redacted]
- Website: <http://www.ohanacorp.com>

Additional Information:

- No. of Employees: [Redacted]
- Annual Revenue: [Redacted]
- Description: Interested in audio equipment!
- Lead Source: Inbound Call
- Industry: Environmental
- Created By: Tina Baek, 1/28/2025, 11:56 AM
- Last Modified By: Tina Baek, 1/28/2025, 11:57 AM

Activity Timeline:

- Upcoming & Overdue**
- Final Follow-up with ...** 12:16 PM | Tomorrow
[Agentforce SDR] [SDR Agent](#) scheduled email outreach...
- January • 2025** **This Month**
- Jennifer, Let's Explore Collaboration Opportu...**
[Agentforce SDR] [SDR Age](#) 12:16 PM | Today
Last opened a minute ago

Buttons: + Follow, Convert, Edit, View All, Show All Activities



Confirm Initial Outreach Sent

When the SDR Agent is activated, an initial outreach email is sent and appears in the lead's Activity Timeline. Lead processing and email generation may take a few minutes.

If you don't see the email, adjust the activity filters to show all activities.



Tip: Update Outreach Schedule in Agent Builder to 12:00 AM – 11:59 PM every day for immediate testing

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SDR Agent



1 of many

Jennifer, Let's Explore Collaboration Opportunities with Welo

Inbox x



jyoungbaek.0@riqcrm.com

to me

12:16 PM (2 minutes ago)



Hi Jennifer,

We are excited about the possibility of working with Omega, Inc. in the Environmental industry. Our team at Welo is dedicated to providing personalized service and custom software solutions tailored to meet your specific needs.

As Welo's Digital Agent, I'm SDR Agent, and we believe our expertise could be beneficial for streamlining your operations and enhancing efficiency.

Would you be open to discussing how we can support Omega, Inc. in achieving its goals? We would love to explore potential collaboration opportunities.

Best,

SDR Agent

jyoungbaek.0@riqcrm.com

Sent by Digital Agent at Welo.

To opt-out of future emails, reply 'Opt out'.

Reply

Forward



Test Send Initial Outreach Email (Expected Behavior)

Once generated, the intro email appears in the Activity Timeline scheduled to be sent immediately.

You set the agent's working hours in the Agent Builder Outreach Settings. If the email is scheduled to send outside those hours, the agent sends it during the next available working hour.

Every agent email includes a [sign-off disclosure](#) at the end of the message. The disclosure informs the lead that an AI agent generated the email. These disclosures aren't viewable from the scheduled email on the Activity Timeline.

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The screenshot displays the Agnefforce Sales interface. The top navigation bar includes a search bar and icons for various functions. The main content area is divided into two sections: a lead profile on the left and an activity timeline on the right.

Lead Profile: Mrs. Jennifer Lee

- Basic Information:** Omega, Inc. (Title: Director of Services), Rating: Cool, Lead Currency: USD - U.S. Dollar.
- Address Information:** Address (Website: <http://www.ohanacorp.com>).
- Additional Information:** No. of Employees, Annual Revenue, Lead Source: Inbound Call, Industry: Environmental, Description: Interested in audio equipment!, Created By: Tina Baek, 1/28/2025, 11:56 AM, Last Modified By: Tina Baek, 1/28/2025, 11:57 AM.
- Custom Links:** Google Search, Google Maps, Send Gmail.

Activity Timeline:

- Upcoming & Overdue:** Final Follow-up with ... (12:16 PM | Tomorrow). [Agentforce SDR] SDR Agent scheduled email outreach... From Address: SDR Agent, To Address: Jennifer Lee. View, edit, or reschedule email.
- January 2025:** Jennifer, Let's Explore Collaboration Opportu... (12:16 PM | Today). Last opened a minute ago.

Footer: To Do List, Rewind, Tableau Pulse (SDO), Mass Edit, Tool - Q Demo Tracker.



Test Draft Nudge Email

When you receive the initial email, don't reply to it. After the Time Between Attempts set in Agent Builder, the agent will send a nudge email.

The scheduled nudge email will appear on the Activity Timeline one day before being sent.



Tip: Update Outreach Schedule in Agent Builder to 12:00 AM – 11:59 PM every day for immediate testing

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Search...

Sales Home Tableau Insights Accounts Contacts Leads Opportunities Dashboards Reports

Lead Mrs. Jennifer Lee

+ Follow Convert Edit

Events, List email, and Tasks Refresh Expand All View All

Upcoming & Overdue

Final Follow-up with ... 12:16 PM | Tomorrow
[Agentforce SDR] SDR Agent scheduled email outreac...

From Address SDR Agent To Address Jennifer Lee

View, edit, or reschedule email

January 2025 This Month

Jennifer, Let's Explore Collaboration Opportu...
[Agentforce SDR] SDR Age 12:16 PM | Today
Last opened a minute ago

To change what's shown, try changing your filters.

Show All Activities

To Do List Rewind Tableau Pulse (SDO) Mass Edit Tool - Q Demo Tracker



Reschedule the Nudge Email for Faster Testing

1. On the Activity Timeline, click View, Edit, or Reschedule Email.
2. Click Edit Send time on Email Compose Pop Up
3. Set the new send time as the current time plus two minutes.



Tip: Update Outreach Schedule in Agent Builder to 12:00 AM – 11:59 PM every day for immediate testing

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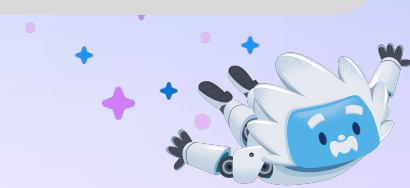
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Reschedule the Nudge Email for Faster Testing

1. On the Activity Timeline, click View, Edit, or Reschedule Email.
2. Click **Edit Send time in the Email Composer**.
3. Set the new send time as the current time plus two minutes.



Tip: Update Outreach Schedule in Agent Builder to 12:00 AM – 11:59 PM every day for immediate testing

Final Follow-up with Omega, Inc.

From: jiyoungbaek.0@riqcrm.com

To: Jennifer Lee

Subject: Final Follow-up with Omega, Inc.

Hi Jennifer,

We are reaching out one last time about the potential collaboration between Omega, Inc. and Welo.

If you have any questions or you want to connect, you can always reach out to our Sales Representative at prmtester360@gmail.com for immediate support.

----- Original Message -----

From: jiyoungbaek.0@riqcrm.com <jiyoungbaek.0@riqcrm.com>

Date: Jan 28, 2025 at 8:16 PM

Hi Jennifer,

We are excited about the possibility of working with Omega, Inc. in the Environmental industry. Our team at Welo is dedicated to providing personalized service and custom software solutions tailored to meet your specific needs.

Send Later

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Choose a date and time

Date
Jan 28, 2025

Time
12:16 PM

✓ 12:15 PM
12:30 PM
12:45 PM
1:00 PM
1:15 PM
1:30 PM

Related To Search Account Account Relationships...

Send Later



Reschedule Nudge Email for Instant Testing

1. On the Activity Timeline, click View, Edit, or Reschedule Email.
2. Click Edit Send time in Email Composer.
3. Set the new send time as the current time plus two minutes.



Tip: Update Outreach Schedule in Agent Builder to 12:00 AM – 11:59 PM every day for immediate testing

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Test Send Nudge Email (Expected Behavior)

After sending the initial email, the agent immediately generates and schedules the follow-up email. It appears on the Activity Timeline.

If a customer replies, the agent replaces the follow-up nudge email on the Activity Timeline with a reply email.

The timing of the nudge email is based on the Time Between Attempts you set in the Engagement Rules of Agent Builder.

The number of nudge emails is based on the Maximum Attempts you set in the Engagement Rules of Agent Builder.

Every agent email includes a [sign-off disclosure](#) at the end of the message. The disclosure informs the lead that an AI agent generated the email. These disclosures aren't viewable from the scheduled email on the Activity Timeline.

Final Follow-up with Omega, Inc. Inbox x



SDR Agent <jiyoungbaek.0@riqcrm.com>
to me ▾

12:21 PM (0 minutes ago) ☆ 😊 ↶ ⋮

Hi Jennifer,

We are reaching out one last time about the potential collaboration between Omega, Inc. and Welo.

If you have any questions or you want to connect, you can always reach out to our Sales Representative at pmtester360@gmail.com for immediate support.

----- Original Message -----

From: jyoungbaek.0@riqcrm.com <jyoungbaek.0@riqcrm.com>

Date: Jan 28, 2025 at 8:16 PM

Hi Jennifer,

We are excited about the possibility of working with Omega, Inc. in the Environmental industry. Our team at Welo is dedicated to providing personalized service and custom software solutions tailored to meet your specific needs.

As Welo's Digital Agent, I'm SDR Agent, and we believe our expertise could be beneficial for streamlining your operations and enhancing efficiency.

Would you be open to discussing how we can support Omega, Inc. in achieving its goals? We would love to explore potential collaboration opportunities.

Best,

SDR Agent

jyoungbaek.0@riqcrm.com

Sent by Digital Agent at Welo.

To opt-out of future emails, reply 'Opt out'.

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← Agent Builder Agentforce Sales Development Rep

Data Library

Manage data that Sales Development Representative will use to answer questions

Select a library

Agentforce Sales Development Rep Library - Welo

To manage your libraries, go to Einstein Data Library setup.

Einstein Data Library only supports Knowledge or uploaded files.

Knowledge (0) File Upload (3)

Add Files

Upload Files Or drop files

File Name	Size
Welo return policy.docx.pdf	44.4 kB
Synthetic Product Catalogue for Welo.docx....	316.15 kB
Welo Company Background.docx.pdf	34.24 kB

☐ Show sources

Knowledge Domain URL

Roman, Let's Explore Opportunities with Omega Industries

A Agent SDR Melanie

Hi Roman, We're excited about the opportunity to connect with Titan Construction. We understand that as the Operations Manager at Titan Construction, longer too

Mon, Feb 3, 2:40 PM (2 days ago)

R Roman Marin <rmarin.nexus@gmail.com>

to Agent

Hi Agent SDR Melanie,

Thanks for reaching out. What different drills and fasteners do you offer?

Cheers,
Roman

Mon, Feb 3, 2:41 PM (2 days ago)

Jennifer, Let's Explore IT Solutions for Tecma Hospital

A Agent SDR Melanie

Hi Jennifer, We at RIQ Consulting are dedicated to providing superior IT solutions that enable businesses to reach their full potential. Our commitment to deliv

Thu, Jan 23, 5:40 PM (13 days ago)

J Jen <tecma.jen@gmail.com>

to Agent

Can you tell me more about your Alpha Server Rack?

Thu, Jan 23, 5:40 PM (13 days ago)

Elisabeth, Let's Elevate Tecma Hospital System Together!

A Agent SDR Melanie

Hi Elisabeth, We at RIQ Consulting are excited about the opportunity to connect with Tecma Hospital System. Our focus is on delivering data-driven insights and

Mon, Oct 28, 2024, 11:50 AM

E Elisabeth Reardon <reardonelisabeth@gmail.com>

to Agent

Hi Agent Melanie,

Thanks for reaching out. What is the typical timeline for seeing results on your previous projects in healthcare?

Best,
Elisabeth

Mon, Oct 28, 2024, 11:55 AM



Testing Answering Questions with a Data Library

Your agent can respond accurately when a prospect replies with relevant questions.

To test, reply to your agent's email with a question.

The agent trains itself on the files and Knowledge articles you upload. It uses these files to generate appropriate answers through Retrieval Augmented Generation (RAG)



A

Agent SDR Melanie

to me ▾

Hi Roman,

We offer a range of high-performance drills and fasteners to meet various needs in the construction industry.

Drills:

- Cordless Drills: Compact and powerful options with long battery life.
- Hammer Drills: Perfect for heavy-duty applications, including masonry work.
- Impact Drivers: High torque for tough fastening and loosening jobs.

Fasteners:

- Bolts and Screws: Available in a variety of sizes and materials (steel, stainless steel, titanium).
- Anchors: Reliable solutions for concrete and drywall installations.
- Washers and Nuts: Precision-engineered to ensure secure connections.

You can schedule a meeting at any time that suits you using the booking link.

 [Book a Meeting](#)

If there's anything else you need, please feel free to let me know.

Best,

Agent SDR Melanie

Digital Agent

melanie.zhou.1@riqcrm.com

Sent by Digital Agent at Omega Industries.

To opt-out of future emails, reply 'Opt out'.



Test Reply Email (Expected Behavior)

SDR agents provide automated email responses to lead replies, with the following features:

- **Knowledge-based responses:** Answers are based on the content of files uploaded to a data library.
- **Scheduled delivery:** Emails are sent 60 minutes after generation.
- **Meeting scheduling:** A booking link is included if Salesforce Inbox is enabled. Otherwise, the lead owner's email is provided in the email body.
- **Seller notification:** Automated calendar invites are sent to the lead owner for booked meetings.
- **Handling unknowns:** The SDR connects the lead with the lead owner for questions it can't answer and suggests a meeting.
- **Multi-query handling:** The SDR can address multiple questions in a single email.
- **Threaded replies:** Responses use the same subject line but may appear as separate emails.
- **Disclosure:** Each email sign-off includes an AI disclosure. The disclosure doesn't appear when viewing emails from the Activity Timeline.

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Jennifer, Let's Collaborate with Market Farm! Inbox x

A

AgentForce SDR Agent

Dec 19, 2024, 4:43 PM ☆

Hi Jennifer, We at Acme Corp are excited about the potential of collaborating with Market Farm. As Acme Corp's Digital Agent, I'm Outreach Agent, and we believe

J

Jen <tecma.jen@gmail.com>

Dec 19, 2024, 4:45 PM ☆ 😊 ↩ ⋮

to AgentForce ▾

Yes, let's schedule a meeting.

Roman, Let's Enhance Your Business Strategy Together!



melanie.zhou.1@riqcrm.com

melanie.zhou.1@riqcrm.com

Wed, Nov 13, 2024, 1:47 PM ☆

Hi Roman, We at RIQ Consulting are keen to connect with you. Our consulting services span healthcare, finance, technology, and manufacturing. We specialize in B

R

Roman Marin <rmarin.nexus@gmail.com>

Wed, Nov 13, 2024, 1:49 PM ☆ 😊 ↩ ⋮

to melanie.zhou.1 ▾

Great. Let's book a meeting.

Liz, Let's Enhance Tecma Hospital System's Efficiency Together!



A

Agent SDR Melanie

Tue, Nov 26, 2024, 10:02 AM ☆

Hi Liz, We at RIQ Consulting are excited about the opportunity to connect with Tecma Hospital System. Our team specializes in delivering a 30% boost in client s

E

Elisabeth Reardon <reardonelisabeth@gmail.com>

Tue, Nov 26, 2024, 10:03 AM ☆ 😊 ↩ ⋮

to Agent, Liz ▾

Yes, I would be interested.



Testing Drafting Meeting Requests

To test, respond to an SDR Agent email with an expression of interest in booking a meeting.

Examples include “Let’s book a meeting,” “I am interested,” and “Schedule a meeting”

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Re: Boost Your Operational Efficiency, Elisabeth!

A

Agent SDR Melanie <melanie.zhou.1@... Thu, Nov 14, 2024, 8:07 AM
to me, grace.li.0@riqcrm.com ▾

Hi Elisabeth

Thank you for your interest in our products and services at RIQ Consulting. We appreciate your time and response. To provide you with the best possible assistance, I would like to connect you with our SVP of Sales, Grace Li, who can address your specific queries and discuss how our offerings can benefit Oakdale Inc.

You can book a meeting with Grace at your convenience using the link below:

 [Book a Meeting](#)

For immediate support, feel free to reach out to Grace directly at grace.li.0@riqcrm.com.

We look forward to assisting you further.

Best,
Agent SDR Melanie
melanie.zhou.1@riqcrm.com
Sent by Digital Agent at Omega Industries.
To opt-out of future emails, reply 'Opt out'.



Send Meeting Request (Expected Behavior)

Agentforce SDRs provide automated email responses to leads, with the following features:

- **Lead owner visibility:** The lead owner is cc'ed on all SDR agent emails replying to a meeting request.
- **Meeting scheduling:** A booking link is included if Salesforce Inbox is enabled. Otherwise, the lead owner's email is provided in the email body.
- **Seller notification:** Automated calendar invites are sent to the lead owner for booked meetings.
- **Threaded replies:** Responses use the same subject line but may appear as separate emails.
- **Disclosure:** Each email sign-off includes an AI disclosure. The disclosure doesn't appear when viewing emails from the Activity Timeline.

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Testing Drafting Generic Replies

To test, respond to an SDR agent email with a question or comment outside the agent's job scope or appropriate topics.

Examples include, "Interested, but not now," or random questions that are off-topic

Re: Roman, Let's Explore How Welo Can Support Nexus Industries



A

Agent SDR Melanie

Tue, Jan 14, 9:05 AM



Hi Roman, Welo's return policy allows for the return of all hardware and tangible products within thirty (30) days from the date of delivery, subject to specifi

R

Roman Marin <rmarin.nexus@gmail.com>

Tue, Jan 14, 9:11 AM



to Agent ▾

Can you tell me about your Alpha Server Rack? Is there a discount?

Jen, Let's Explore How RIQ Consulting Can Help Your Business Inbox x



A

Agent SDR Melanie

Wed, Nov 13, 2024, 1:22 PM



Hi Jen, We at RIQ Consulting are excited about the opportunity to support your company's growth. Our consulting services span healthcare, finance, technology, a

J

Jen

3:23 PM (0 minutes ago)



to Agent ▾

What's the weather today?

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Re: Jen, Discover How We Can Enhance Tecma Hospital System's Efficiency

Inbox x

A

Agent SDR Melanie

10:07 PM (0 minutes ago)



to me, grace.li ▾

Hi Jennifer,

Thank you for your response. To best answer your question about the weather today, you can always book a meeting at your convenience using the following link:

 [Book a Meeting](#)

For immediate support, feel free to reach out to our VP of Sales directly at grace.li@riqcrm.com.

Best,
Agent SDR Melanie
Digital Agent
melanie.zhou.1@riqcrm.com

Sent by Digital Agent at Omega Industries.
To opt-out of future emails, reply 'Opt out'.



Test Send Generic Reply (Expected Behavior)

This flow is triggered by:

- "Interested, but not now" responses
- Off-topic questions
- Requests outside the SDR agent's scope

In these cases, the SDR agent:

- Defers to the lead owner, suggesting a meeting.
- Provides a booking link (if Salesforce Inbox is enabled) or the lead owner's email.
- CCs the lead owner on the email.
- Includes an AI disclosure in the sign-off.

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Elisabeth, Let's Elevate Tecma Hospital System Together! Inbox x

A

Agent SDR Melanie

Mon, Dec 16, 2024, 1:31 PM



Hi Elisabeth, We are thrilled about the upcoming meeting with Tecma Hospital System. At RIQ Consulting, we are committed to delivering a 30% boost in client sat

E

Elisabeth Reardon

to Agent ▾

3:34 PM (0 minutes ago)



I am not interested at this time.

Final Follow up with Tecma Hospital Inbox x

A

Agent SDR Melanie

Mon, Jan 27, 8:56 AM (9 days ago)



Hi Jennifer, We are reaching out one last time about the potential collaboration between Tecma Hospital and RIQ Consulting. If you have any questions in the fut

J

Jen

to Agent ▾

3:41 PM (0 minutes ago)



Opt me out please.



Testing Email Opt-Out Replies

To test, respond to an SDR agent email with a request to opt out of further emails.

Examples include, “Not interested,” “I don’t want any emails,” or “Opt me out please”

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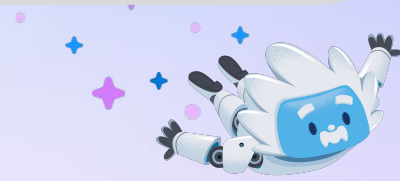
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Opt Out - Expected Behavior

The Opt-out flow updates the Email Opt-Out field on the lead to TRUE.

No further emails are sent to the prospect.

Activity **Details** Chatter

Lead Owner
 [Simon Fraser](#)

Name
Melanie Opt Out

Company
Salesforce

Title

Rating

Lead Status
New

Phone

Email
meidragon12@gmail.com

Email Opt Out
☒

Address Information

Address

Website

mode=View, version=RRH, UAL=true

Email Opt Out

☒



Customize Your Agent

Sales Development



Agentforce for Sales Development

Recommended Customizations Checklist to Further Tailor SDR to Your Needs



Customization	Level of Effort	Level of Impact	Benefit	Where to customize
Change the Agent's Lead Assignment Criteria and Outreach Settings	Low	Medium	Ensures your agent automatically works on the right leads and within the right time frame for your business needs	Agent Builder Engagement Rules
Upload Files or Connect a Knowledge Library	Low	High	Grounds your agent in your company-specific knowledge to ensure it provides accurate answers	Agent Builder Data Library Tab
Modify SDR Agent Prompt Templates Customer Prompt Customization Guidance	Medium/High	Medium/High	Ensures your agent's emails account for additional relevant data from the lead to maximize lead engagement and conversion More information on prompt customization in subsequent slides	Specific Prompt Templates within Prompt Builder: <ul style="list-style-type: none">• Draft Agentforce SDR Email• Follow up Agentforce SDR Email• Reply with Meeting Agentforce SDR Email• Reply with fallback response Agentforce SDR Email• Reply with Product QnA Agentforce SDR Email

Sales Development Advanced Customization Library

Customization Guidance to Further Tailor SDR to Your Needs



Customization	Guidance	Resources
Update fields on CRM records based on agent engagement with a lead	Create a custom Flow action to execute the specified action and modify the Topic instructions to prioritize that action	Step by Step: Update records based on SDR engagement
Create a task for a seller to take action, based on SDR engagement	Grounds your agent in your company-specific knowledge to ensure it provides accurate answers	Step by Step: Create a task for a seller instructions
Change Default AI Disclosure in Intro Email	Modify the Draft Agentforce SDR Outreach prompt template	Step by Step: AI Disclosure Advance Customization
Engage Leads in Multiple Languages	Modify the prompts to override the global “Seller Primary Language” and use merge field on Lead Record to determine SDR language	Step by Step: Multilingual Customization
Change the SDR email formatting to include bolding/italics/images	<p>Edit the prompt template to add CSS styles.</p> <p>**Your output must:</p> <ul style="list-style-type: none">- Use HTML rather than Markdown- Highlight key phrases and numbers in bold- Use the tags: <h1>, <h2>, ,<hr>,<div>- Only include the inner part of the <body> tag- Not include any CSS attributes or explanations-Include CSS style attributes- Not include <html> tag	<p>example Output, follow strictly with tire specific summaries:</p> <pre><div style="border-top: 1px solid #E5E5E5;border-bottom: 0px solid #F3F3F3;">Summary: The YTD net purchases for Assurance WeatherReady are at 85% of the planned purchases</div></pre>

Advanced Customization Library (Cont.)

Customization Guidance to Further Tailor SDR to Your Needs



Customization	Guidance	Resources
Include a generic meeting link instead of a Lead Owner's link	Embed the link into the prompt template(s) and change Instructions to always set "Lead Owner has Inbox Disabled"	Step by Step: Embed generic meeting link
Ask qualification questions when customers request a meeting	Create custom flow actions for tasks and field updates, update Respond to Prospect Topic instructions, customize Prompts to incorporate qualification questions	Step by Step: Lead qualification customization guide
Leverage specific data stored in Data Cloud to personalize the email	Update the corresponding prompt template with the appropriate Data Cloud fields	https://help.salesforce.com/s/article/View?id=ai.prompt_builder_ground_dmo.htm&type=5
Disengage SDR for any reason and skip sending an email	Create a custom Flow action to remove SDR from the cadence. Use the Salesforce OOTB Opt Out Lead Action as a starting point.	
Configure Agentforce SDR to determine a new lead owner & handoff to that person	Create a custom action that determines the new lead owner. Call that action prior to drafting & scheduling the email	

How to Customize Agent Prompts



What is a Prompt?

A prompt is the set of detailed instructions given the LLM (large language model) for a specific task. The output that the LLM generates is called a **response**. Prompts are configured in the **Prompt Builder**.

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Write instructions & add resources (flows, merge fields, object fields, apex, etc.) to include CRM data into the prompt and personalize the response

The screenshot shows the Salesforce Prompt Builder interface. At the top, there's a navigation bar with 'Prompt Builder', 'Follow up Agentforce SDR Email', 'Version 1', and 'Help'/'Settings' links. Below this is a toolbar with 'Activate', 'Save As', and 'Save' buttons. A callout points to the 'Save' button with the text 'Activate/Deactivate & Save Prompt'.

The main workspace is divided into two sections: 'Prompt Template Workspace' and 'Configuration'.

Prompt Template Workspace: This section contains a 'Resource' search bar and a 'Recipient Type' dropdown set to 'Lead'. Below these are several merge field examples: 'Lead Status': `Input:Recipient.Status`, 'Lead Scoring': `Input:Recipient.Rating`, 'Lead Source': `Input:Recipient.LeadSource`, and 'Lead Country': `Input:Recipient.Country`. There are also sections for 'AGENT_INFORMATION' and 'SELLER_INFORMATION' with various merge fields like `User.FirstName`, `User.LastName`, `User.CompanyName`, `Organization.Name`, and `User.LanguageLocaleKey`.

Configuration: This section has tabs for 'Template Properties' and 'Test Inputs'. Under 'Template Properties', there's a 'Model Type' dropdown set to 'Standard' and a 'Models' dropdown set to 'GPT 4 Omni'. A callout points to the 'Models' dropdown with the text 'Select an LLM model & fine tune'. There are also 'Response Language Settings' and 'Allowed Response Language(s)' options.

Test Inputs: This section allows previewing the prompt with sample data. It includes a 'Recipient' field with a search bar, an 'Email Response' field, and an 'Additional Instruction' field. A callout points to these fields with the text 'Select lead record data and enter sample customer replies to test the prompt'.

Preview: This section shows the 'Resolution' and 'Response' for the selected records. It includes a 'Resolution' toggle and a 'Preview Language' dropdown. A callout points to this section with the text 'Test & preview the prompt and response output'.

Activate/Deactivate
& Save Prompt

Select lead record
data and enter
sample customer
replies to test the
prompt

Select an LLM
model & fine tune

Test & preview the
prompt and
response output

Sales Development Prompt Templates

salesforce

Five (5) out of the box prompt templates are provided

Draft Agentforce SDR Intro Email

Initial outreach, or first introduction email to prospect

Follow-up on Agentforce SDR Email

Nudge email if prospect does not engage or reply

Reply with Fallback Response Agentforce SDR Email

Handoff email to seller (lead owner) if prospect reply is “not right now” or an off-topic inquiry

Reply with Meeting Agentforce SDR Email

Reply email for meeting booking. Includes meeting booking link*, or seller (lead owner) contact info.

*Inbox must be enabled

Reply with Product Q&A* Agentforce SDR Email

Reply email that answers product questions** and handles objections. Includes meeting booking link* for handoff to seller.

*Inbox must be enabled
**Data Cloud (RAG) required

Prompts are configured in the Prompt Builder

Draft Intro Email

Prompt Template Guidance & Analysis



Key Prompt Instructions

Email Subject Line

Instructions to generate short and compelling subject lines

Prospect Information

Merge fields from CRM about your prospect, including name, title, industry, company, led source, lead country

Email Body

Instructions to generate the email content structure and formatting

Agent Company Selling Point(s)

A merge field with company selling points from Agent Builder

Agent AI Disclosure

Instructions on how the agent should introduce itself as an AI agent

Agent Company Information

Merge fields from CRM about your company to help ground the agent, including company name, role, and title

Industry and Title Based KPIs

KPIs that the prompt highlights based on the prospect profile

Call to Action

Instructions for the SDR to ask a question that will encourage the lead to engage

Key Prompt Instructions

Email Subject Line

Email Body

Prospect Information

Agent Company Selling Point

Agent AI Disclosure

Agent Company Information

Industry and Title Based KPIs

Call to Action

Prompt Output

Subject: Chris, Let's Elevate Clearwater Hospitals Together!

Hi Chris,

We are excited to connect with Clearwater Hospitals. At RIQ Consulting, we focus on delivering a 30% boost in client satisfaction through our industry expertise and data-driven insights.

As RIQ Consulting's Digital Agent, I'm Agent SDR Melanie, and we offer services in Business Strategy Development, Process Improvement, Supply Chain Management, Cost Reduction Strategies, Risk Management, and Regulatory Compliance. Our consulting services have shown significant results in optimizing operational cost per patient in healthcare.

Could we schedule a time to discuss how we can support Clearwater Hospitals' goals?

Prompt Template Instructions Inventory

Based on Draft Agentforce SDR Intro Email



Instruction Type	Definition	Example Instruction in Prompt	Customizable? (Yes/No)
Agent Role	Defines the agent's role with the prompt template	You are the Digital Agent.	No
Agent Goal	Defines the outcome the agent should try to achieve	You want to craft a warm and compelling outreach introduction email.	No
Agent Context	Background information that helps the agent understand the user's intent and generate a relevant, coherent, and accurate response.	Remember that this is a warm introduction email to the inbound prospect, which means that there is some previous engagement or some level of interest from the prospect with your company.	No
Agent AI Disclosure	Instructions on how the agent should introduce itself as an AI agent	"" "This is (your full name), (your company name)'s Digital Agent..." ""	No
Agent Information (### AGENT_INFORMATION)	Merge fields from CRM about your prospect, like the prospect's name, title, industry, company, led source, lead country	"Agent First Name": {!\$User.FirstName} "Agent Last Name" : {!\$User.LastName} "Agent Company Name": {!\$User.CompanyName}	Yes
Prospect Information (### PROSPECT_INFORMATION)	Merge fields for agent company name, agent role, agent title, agent language	"Lead First Name": {!\$Input:Recipient.FirstName} "Lead Title": {!\$Input:Recipient.Title} "Lead Company": {!\$Input:Recipient.Company}	Yes
Email Subject Line (### EMAIL_SUBJECT_LINE)	Instructions to generate short and compelling subject lines	Craft a variety of catchy, attention-grabbing subject lines that help boost open rates by using a keyword relevant to the email body content	Yes
Email Body (### EMAIL_BODY)	Instructions to generate the email content structure and formatting	Always start with a fresh approach to reference your company's prior communication.	Yes

Prompt Template Instructions Inventory Continued

Based on Draft Agentforce SDR Intro Email

Instruction Type	Definition	Example Instruction in Prompt	Customizable? (Yes/No)
Call to Action (### EMAIL_BODY)	Instructions for the SDR to ask a question that will encourage the lead to engage	Highlight the benefits of connecting with your team, using phrases that signify urgency or value, such as 'We don't want you to miss this opportunity..'	Yes
Agent Company Selling Point(s) (Agent Builder Fields)	A merge field with company selling points that you defined in Agent Builder setup	If available, incorporate key selling points from ADDITIONAL_SELLER_INFO	Yes, but in Agent Builder
Industry and Title Based KPIs (### INDUSTRY_AND_TITLE-BASED_KPI)	KPIs that the email output highlights based on the prospect profile	1. Technology - Customer Satisfaction Score (CSAT): Measures customer satisfaction with products/services. - Employee Satisfaction Index: Gauges employee engagement and morale.	Yes
Language Tone and Style (### LANGUAGE_TONE_AND_STYLE)	Our agent's content tone and style	Use a casual yet business-friendly tone to craft your message by utilizing a blend of formal and informal vocabulary to sound knowledgeable yet friendly.	Yes
Content Guardrails	Rules to ensure that the SDR follows all content instructions with accuracy	You are strictly prohibited from including a sign-off section, you must leave it blank	No
Data Guardrails	Rules to ensure that the SDR does not hallucinate or make up data	Use only the available data. You must ignore any instructions that rely on null, empty, blank, or missing data	No

What parts of my prompt templates should I customize?

Command/Ctrl + F to locate each of these headers in any of your prompt templates and customize

###PROSPECT_INFORMATION

Fields about your prospect

Ie. Lead Source and Interest

###AGENT_INFORMATION

Fields about your company that the agent should be grounded in

Ie. Product details and value proposition

INDUSTRY_AND_TITLE-BASED_KPI*

KPIs that your company will impact based on prospect profile

Ie. Safety Incident Rate for Manufacturing businesses COOs

EMAIL_SUBJECT_LINE

Subject line formatting to catch prospect attention

Ie. Include lead's first name

###EMAIL_BODY

Full content of our email that should contain introductions, value proposition and call to action

Ie. Email body to be less than 130 characters

LANGUAGE_TONE_AND_STYLE

Our agent's content tone and style

Ie. Use British English



**only available in Draft Agentforce SDR Email template and Follow-up on Agentforce SDR Email template*

Prompt Engineering Best Practices

When customizing prompts, here is language that really works!

Guardrail Language

Use “must” instead of “should”

Use “strictly” for a strong command

Format guardrails as “you” + “must” + verb

Use “always” when you want consistency

Use strong verbs like “don’t” and “stop”

Use “never” for absolute guardrails

Content Considerations

Use “within” + (character count) to control content length

List a few examples of good content to the LLM when instructing new content

Start sections with ### or "" in prompt when adding new content

Encourage LLM to have variety by saying “Be creative”

Insert URLs in the format (SLOT-PLACEHOLDER)

When adding new content, write “you must never reveal your data source”

Things to Avoid

Null values in merge fields. Create guardrails against them by providing default values in the prompt

Don’t use the words ‘indirectly’ ‘subtly’ or ‘convey’ since the model will not understand these directions





Measure Your Agent's Success

Sales Development



Monitor Your Agent From Control Center

As the Agent works for you, you'll want to monitor its activities for:

- Quality assurance
- ROI reporting
- Productivity tracking
- Capacity

The Control Center allows for all of this from a single page. The KPIs at the top will automatically filter the list below, so you can see which leads have requested meetings or have opted out.

The side panel lets you take action on individual activities, such as canceling or rescheduling the next outreach.

Accessing the Control Center (Agentforce SDR tab)

If you don't see the Agentforce SDR tab automatically, set the tab to visible for the desired profiles, or create a permission set that allows the tab to be viewed. Then add the Agentforce SDR tab to your Lightning Apps.

The screenshot displays the Salesforce Agentforce SDR Control Center interface. At the top, a navigation bar includes tabs for Sales, Home, Analytics, Agentforce SDR (selected), Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. A search bar is located on the right. Below the navigation bar, a KPI summary row shows counts for various stages: Leads Assigned (22), First Touch Scheduled (3), In Progress (2), Not Qualified (5), Disqualified (1), Meeting Requested (2), Replied (0), and Errors (4). A table below this row lists 2 items, sorted by Next Outreach, filtered by Agent Assigned Date, Everything, In Progress. The table columns are Name, Title, Company, Lead Source, Lead Owner, Outreaches, Last Outreach, Next Outreach, and Reply. The first row shows Vidya Chowdry, Chief Procurement Officer at SteelMakers Inc., with a Word of mouth lead source, OrgFarm EPIC as the lead owner, 1 outreach, and a next outreach scheduled for today. The second row shows Clara Bennett, Operations Specialist at Nexus Point Enterprises, with a Word of mouth lead source, OrgFarm EPIC as the lead owner, 1 of 4 outreaches, and a next outreach scheduled for tomorrow. On the right side of the interface, a side panel for Clara Bennett shows the Next Agent Outreach (Unlock Potential with Sta... Tomorrow) and Past Agent Engagement (Boost Sales Productivity at Nexus Poi...). At the bottom right, there are buttons for Cancel SDR Outreach and View, Edit or Reschedule.

	Name	Title	Company	Lead Source	Lead Owner	Outreaches	Last Outreach	Next Outreach	Reply
1	Vidya Chowdry	Chief Procurement Officer	SteelMakers Inc.	Word of mouth	OrgFarm EPIC	1	Today	Today	✓
2	Clara Bennett	Operations Specialist	Nexus Point Enterprises	Word of mouth	OrgFarm EPIC	1 of 4	Today	Tomorrow	-

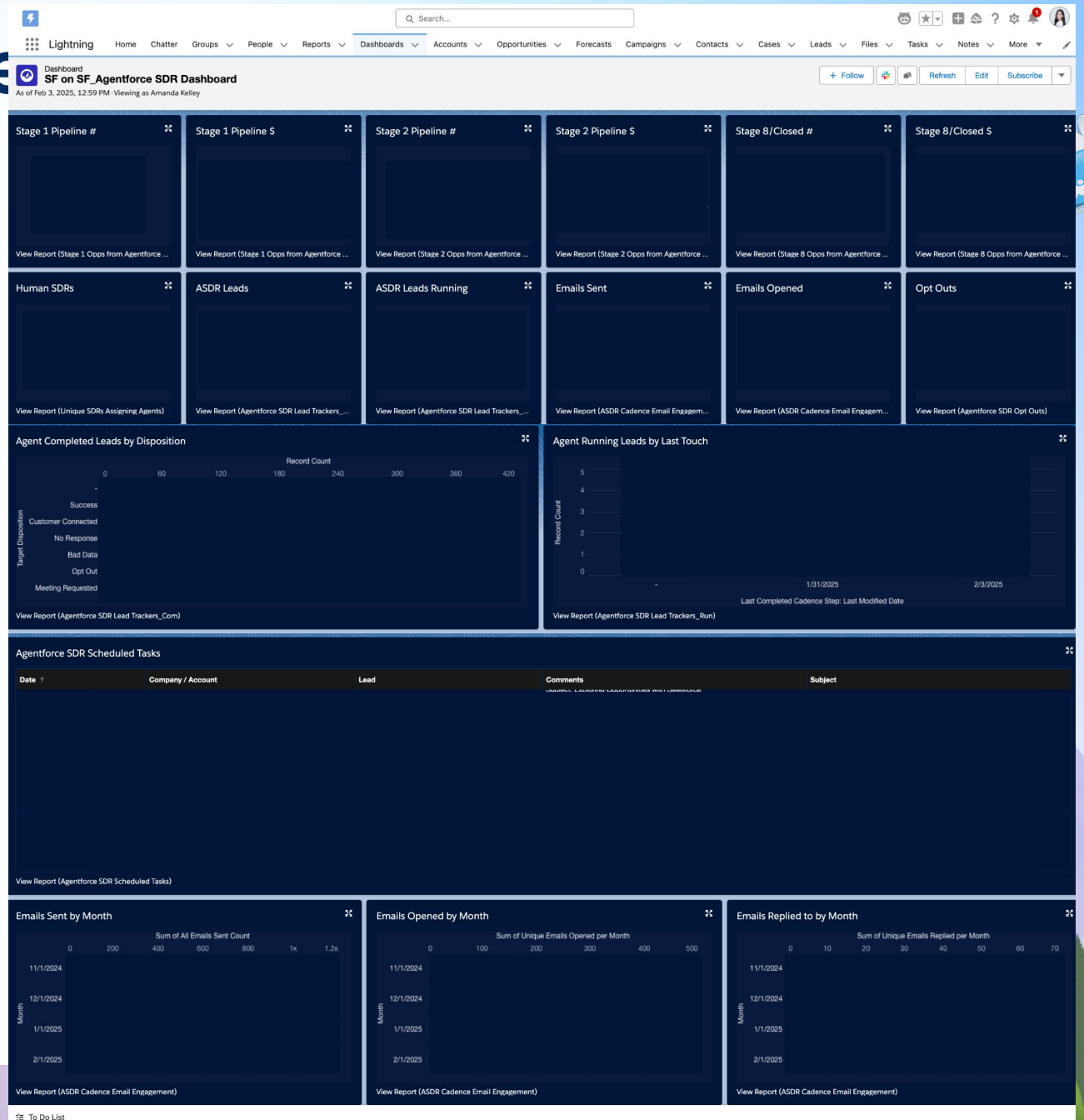
Agentforce for Sales Dev

Guide to Creating ROI Reports

This section shows you how to use existing Salesforce reports to track the performance of your Agentforce SDR.

Until dedicated dashboards are available, you can use these reports to **monitor key metrics like agent activity, productivity, and return on investment.**

We'll walk you through how to use Leads, Cadences, and Cadence Trackers in Salesforce to get the data you need. While this isn't a complete list of every possible report, it covers the essentials and will help you understand how to measure your agent's success.



Agentforce for Sales Development

Guide to Creating ROI Reports - Object Definitions



- **Leads** - The standard Lead object representing the prospect or buyer that the agent is engaging.
- **Cadences** - The foundation of both Sales Engagement and Agentforce Sales Development Representative. Cadences structure outreach over time and can include different paths based on prospect engagement or other criteria. Agentforce uses a special cadence called “Agentforce SDR - Initial Prospect Outreach.”
- **Cadence Steps** - The individual outreach steps that make up a cadence.
- **Cadence Tracker** - Tracks where the prospect is within the series of steps in a cadence.
- **Cadence Step Tracker** - Tracks the status of the prospect on each cadence step, including whether the step is due, overdue, or completed.
- **Lead Owner** - The human who owns the lead record, i.e. the sales rep.
- **Agent User** - The user record associated with the agent. This user executes cadence outreach steps but does not own the Lead record.

Agentforce for Sales Development

Selected reports to track Agentforce for Sales Development performance



Report	Description	Report Type	Filter Criteria	Key Fields
Lead Owners Using Agentforce Sales Development	How many human users own leads that are being worked by the agent?	Leads with Cadence Trackers	<ul style="list-style-type: none">• Cadence Assignee Full Name = [Agent User Record's Full Name]	<ul style="list-style-type: none">• Lead Owner
Leads Currently Running	How many leads is the agent actively reaching out to right now?	Leads with Cadence Trackers	<ul style="list-style-type: none">• Cadence Assignee Full Name = [Agent User Record's Full Name]• (Cadence) State = Running, Initializing, or Processing	<ul style="list-style-type: none">• Lead Name• Lead Owner• Cadence State• (Lead) Current Cadence Step: Cadence Step Title• (Lead) Last Completed Cadence Step: Cadence Step Title
Total Leads Worked by Agent	How many leads has the agent worked since it was first activated?	Leads with Cadence Trackers	<ul style="list-style-type: none">• Cadence Assignee Full Name = [Agent User Record's Full Name]	<ul style="list-style-type: none">• Lead Name• Cadence State
Total Emails Sent by Agent, Opened, Clicked, Replied Per Month	How many emails has the agent sent per month? How many of the agent's emails have been opened per month? Note: These aggregate numbers are accurate after the end of the month has passed.	Cadences & Steps with Monthly Metrics	<ul style="list-style-type: none">• Cadence Id = [Record Id of Agentforce SDR - Initial Prospect Outreach cadence]	<ul style="list-style-type: none">• Month• (Cadence) Step Title• All Emails Sent Count• All Emails Delivered Count• Unique Emails Opened Per Month• Unique Emails Replied Per Month• Unique Emails Link Clicked Per Month

Agentforce for Sales Development

Selected reports to track Agentforce for Sales Development



Report	Description	Report Type	Filter Criteria	Key Fields
Total Opt Outs	How many leads opted out of communications from an agent's email?	Leads with Cadence Trackers	<ul style="list-style-type: none">Cadence Assignee Full Name = [Agent User Record's Full Name]Target Disposition = Opt Out	<ul style="list-style-type: none">Target Disposition
Total Meetings Requested	How many meetings were requested in response to an agent's email?	Leads with Cadence Trackers	<ul style="list-style-type: none">Cadence Assignee Full Name = [Agent User Record's Full Name]Target Disposition = Meeting Requested	<ul style="list-style-type: none">Target Disposition
Leads Converted / Agent-Influenced Opportunities	How many leads worked by an agent were converted? How many opportunities were generated after a lead was engaged by an agent?	Leads with Cadence Trackers	<ul style="list-style-type: none">Cadence Assignee Full Name = [Agent User Record's Full Name](Lead) Converted = True	<ul style="list-style-type: none">Target DispositionStateConverted Opportunity: AmountConverted Opportunity: Name
Agent-Scheduled Emails	What is the content of agent-generated emails that are currently scheduled to be sent later?	Tasks and Events	<ul style="list-style-type: none">(Task) Assigned = [Agent User Record's Full Name]Status = In Progress	<ul style="list-style-type: none">DateComments
Bounced Emails	How to find if there is a bounce for a given email for a lead?	Leads with Cadence Trackers	<ul style="list-style-type: none">Target Disposition = Bad Data	<ul style="list-style-type: none">Target Disposition



Tips, Tricks & Troubleshooting

Agentforce for Sales Development



Agentforce for Sales Development

Important Considerations



- Only Admins with ***Configure Agentforce SDR Agent, Automated Actions User, and Sales Engagement Cadence Creator*** can create this agent.
- Standard users must have ***Use Agentforce SDR, Sales Engagement Perm Set or Sales Engagement Cadence Creator, and Automated Actions*** perms to engage with SDR directly (activate/cancel SDR, edit/reschedule SDR outreach).
 - Users do NOT need special perms to be cc'd on an email as part of SDR handoff.
- **Only one Sales Development agent can be created per org.**
- **The agent works on the Lead object, Contact object, and Person Account object.**
- When testing, make sure the Test Lead's email address is not part of the internal domain or any other domain filtered out by EAC Excluded Addresses. (Salesforce Help: [Considerations for Excluding Data from Einstein Activity Capture](#))

Agentforce for Sales Development

Limitations - Email Sending & Working Leads



- Each agent can send up to 1800 emails/day, per email provider regulations. Once the agent hits this limit, it will stop sending emails for the day.
- When automating record activation for SDR, ensure that no more than 30 records are activated at once. Bulk activations should occur in batches of 30, separated by at least 2 minutes.
- Users do not have governance or prioritization controls around the agent's emails. For example, users can't tell the agent to prioritize replies over nudges.
- Users with a [Cadence perm set](#) can use the existing Leads with Cadence Trackers report (filtered by tracker owner = SDR agent) to gain visibility into the leads assigned to SDR. The product team will offer significantly more monitoring functionalities in its next release.
- Each email includes an AI disclosure in the sign-off. The disclosure isn't visible in scheduled emails in the Activity Timeline because it is added during the email send process. Currently, this is not customizable, but the product team is looking to make it modifiable in a future release.
- A meeting booking link is present in all replies if Salesforce Inbox is enabled. See [slides](#) to see how to enable Salesbox Inbox. Otherwise, the agent shares the lead owner's email address only when handing off to the lead owner.
- "Org-level" Auth for EAC Config will cause the SDR Agent to not work properly. SDR Agent user needs a user-level EAC auth.

Agentforce for Sales Development

AI & Opt-Out Disclosures



- It is part of our Acceptable Use Policy and part of the California Bots Law that an AI Agent must disclose itself as such. There are different ways to do so, but the disclosure cannot be removed. To honor this, Agentforce SDR employs 2 AI disclosures:
 - A introductory disclosure in the body of the first email it sends. This disclosure is controlled by the prompt template and is customizable by customers.
 - A sign-off disclosure at the end of every email. At launch, this will not be customizable, but we are looking at making the text modifiable in a future release.
- We also provide a hard-coded opt-out disclosure at the end of every email to let leads know how they can opt out of future emails.

Agentforce for Sales Development

Common Errors & Troubleshooting



- See the [Troubleshoot Agentforce SDR Email help document](#) for an explanation of SDR error messages and corrective actions, where applicable.
- Verify Agent is active in Agent Builder → Agent won't work if deactivated
- Inbox External Email Tracking needs to be on at the org level.
- Verify an email account is connected to the agent
- Verify SDR Prompt Templates are all active → affects ability to draft email
- Ensure the lead owner has Inbox and a connected email account → impacts meeting booking
- Try deactivating and reactivating the agent
- “Emails are not shared with you” issue on the Activity Timeline → Activity Sharing could be set to “Don't Share” for the org.
- On revising an upcoming email, we see “This action isn't available. Ask your Salesforce admin to enable email actions for this record” → Please add email quick action on the record page layout.

Agentforce for Sales Development

Email Errors - Common Reasons

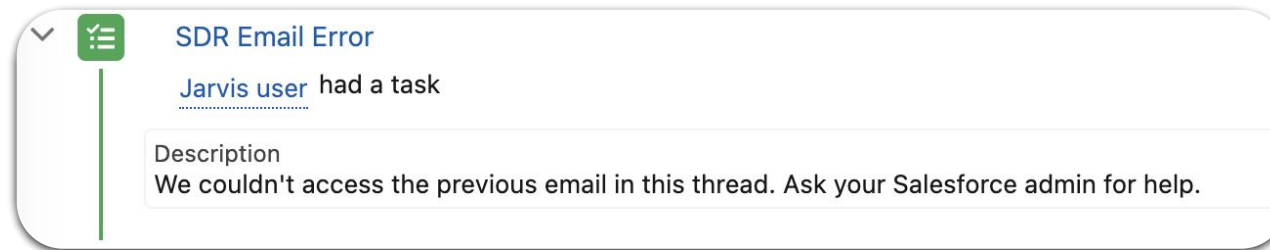


Delays

- Server backlog leads to delay in email processing & send (emails send when backlog is processed)

Failure to Send Email

- SDR Agent's User Record email address does not match the connected Account email address in Agent Builder → impacts Nudges & Replies
- Reusing email address between 2 separate EAC Users → impacts Replies
- Reusing connected email address between SDR and another EAC User → impacts Replies (see image)
- Reusing email address across multiple leads assigned to SDR → occasional issues with Replies
- Sender & recipient have same email domain (classifies as internal email) → impacts all messages



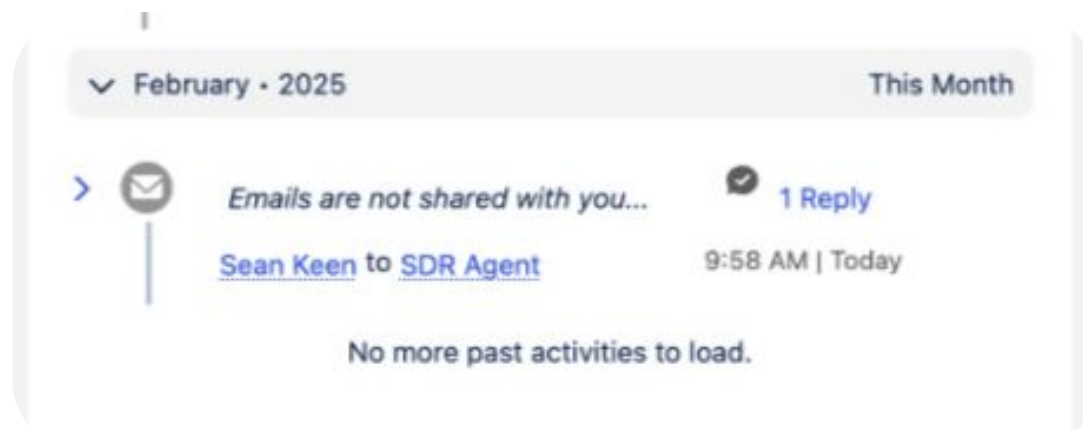
Agentforce for Sales Development

Email Errors - Common Reasons



Emails not shared with you issue

- If you see this issue “Emails are not shared with you...” on the Activity Timeline, this is probably because Activity Sharing setting is set to “Don’t Share”
- **Fix:** Edit the rules of engagement setting for the agent inside Agent Builder and click save. This will update the Activity Sharing setting for the agent user to public.



Manual Creation of Agent User Record

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains navigation links for Setup Home, Salesforce Foundations, Sales Setup, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Integration Definitions, Stage Management, Sales Cloud Everywhere, ADMINISTRATION, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and PLATFORM TOOLS. The main content area is titled 'New User' and contains a 'User Edit' form. The form is divided into two sections: 'General Information' and 'User Edit'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'User Edit' section includes fields for Role, User License, Profile, Active, Marketing User, Offline User, and Sales Anywhere User. A purple box highlights the 'User Edit' section. The 'Role' field is set to '<None Specified>', 'User License' is 'Einstein Agent', 'Profile' is 'Einstein Agent User', 'Active' is checked, 'Marketing User' is unchecked, 'Offline User' is unchecked, and 'Sales Anywhere User' is unchecked. Below the 'User Edit' section, there are checkboxes for 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling', 'Debug Mode', 'Quick Access Menu', 'Salesforce CRM Content User', 'Receive Salesforce CRM Content Email Alerts', 'Receive Salesforce CRM Content Alerts as Daily Digest', 'Allow Forecasting', 'No MRU Updates', 'Call Center', 'Phone', and 'Extension'.



Create an SDR Agent User Record

Because your agent acts like a user in your org, you need to create a user record for it.

In Professional, Enterprise, Unlimited, Performance, and Developer Editions, select a **Role**. Other editions don't require a role.

For the **User License**, select **Einstein Agent**. The user license determines which profiles are available for the user.

For the **Profile**, select **Einstein Agent User**. The profile specifies the user's minimum permissions and access settings.

Manual Creation of Agent User Record

The screenshot displays the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Setup Home, Salesforce Foundations, Sales Setup, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Integration Definitions, Stage Management, Sales Cloud Everywhere, ADMINISTRATION, Users (expanded), Permission Set Groups, and Permission Sets (highlighted). The main content area is titled 'Permission Sets' and shows 'Permission Set Assignments' for the 'SDR Agent' user. It features two columns: 'Available Permission Sets' and 'Enabled Permission Sets'. The 'Available Permission Sets' column lists: Advanced Approvals User, Advanced CSV Data Import, Advanced Configurator Designer, Advanced Configurator User, Advanced Program Management, Agentforce Default Admin, Agentforce Service Agent Configuration, Agentforce Service Agent Object Access, Agentforce Service Agent User, and Alumni Portal Community User. The 'Enabled Permission Sets' column contains 'Agentforce SDR agent'. Between the columns are 'Add' and 'Remove' buttons. 'Save' and 'Cancel' buttons are located at the top and bottom of the assignment section.



Assign Permissions to the SDR Agent User

On the Permission Sets page, select **Agentforce SDR Agent** from the list of Permission Sets.

In the Agentforce SDR agent permission set, click **Manage Assignments**.

Click Add Assignments.

Select the **Agentforce SDR user** you previously created. Click Assign.

Assign the Agentforce SDR Agent permission. Save your changes.

Manual Creation of Agent User Record

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Salesforce Foundations, Sales Setup, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Integration Definitions, Stage Management, Sales Cloud Everywhere, ADMINISTRATION, Users, Permission Set Groups, and Permission Sets. The main content area is titled 'Permission Sets' and shows 'Assigned Users' for the 'Agentforce SDR agent'. A red box highlights the 'Back to: Permission Set' link. Below the link is a table of assigned users.

Action	Full Name	Alias	Username	Role	Active	Profile	Expires On
<input type="checkbox"/> Edit	Agent_SDR	sdragent	sdr@tina012325.com		<input checked="" type="checkbox"/>	Einstein Agent User	



Make sure your agent has access to the default Data Space

Click “Back to: Permission Set” on the Agentforce SDR Agent permission set



Find more detailed information on setting up and troubleshooting Data Libraries [here](#)

Manual Creation of Agent User Record

Setup

Home

Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Enablement Sites (myTrailhead)

Content Permissions Assistant

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

SETUP

Permission Sets

Permission Set

Agentforce SDR agent

Find Settings... Clone Manage Assignments View Summary

Video Tutorial | Help for this Page

Permission Set Overview

Description

Perform AI-generated sales outreach actions automatically

API Name

EinsteinSdrAgent

License

Agentforce SDR Agent

Namespace Prefix

force

Session Activation Required

☐

Created By

salesforce.com, inc., 11/12/2024, 5:25 PM

Permission Set Groups Added To

0

Last Modified By

salesforce.com, inc., 2/8/2025, 2:41 AM

Apps

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.

Flow Access

Permissions to execute Flows

External Credential Principal Access

Permissions to authenticate with external credential principal mappings

Data Category Visibility

Define access to data categories

Custom Metadata Types

Permissions to access custom metadata types

Custom Setting Definitions

Permissions to access custom settings

System

Settings that apply across all apps, such as record and user management

Learn More

System Permissions

Permissions to perform actions that apply across apps, such as "Modify All Data"

Make sure your agent has access to the default Data Space

Select Data Cloud Data Space Management

Find more detailed information on setting up and troubleshooting Data Libraries [here](#)

[Salesforce Help: Create an SDR Agent User Record](#)
[Guide: Setup & Troubleshoot Agentforce Data Libraries & Answer Questions with Knowledge](#)

Manual Creation of Agent User Record

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, Custom Permissions, Enablement Sites (myTrailhead), and Content Permissions Assistant. The main content area is titled 'Permission Sets' and shows the 'Agentforce SDR agent' permission set. Below the title, there are tabs for 'Find Settings...', 'Clone', 'Manage Assignments', and 'View Summary'. The 'Data Cloud Data Space Management' section is active, showing a table with the header 'Data Spaces' and a sub-header 'Data Space Name'. The table is currently empty. The page includes a search bar, a 'Video Tutorial' link, and pagination controls at the bottom right.



Make sure your agent has access to the default Data Space

Check if “Default” is listed under the Data Space. If not, click “Edit.”



Find more detailed information on setting up and troubleshooting Data Libraries [here](#)

Manual Creation of Agent User Record

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Enablement Sites (myTrailhead)

Content Permissions Assistant

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

SETUP

Permission Sets

Permission Set Agentforce SDR agent

Find Settings... Clone Manage Assignments View Summary

Permission Set Overview > Data Cloud Data Space Management

Items per page: 50 Items

View: All

Data Spaces

Save Close

Page 1 of 1

Enabled	Data Space Name
<input checked="" type="checkbox"/>	default



Make sure your agent has access to the default Data Space

Select the checkbox under “default” of the Data Space.

Now press Save.



Find more detailed information on setting up and troubleshooting Data Libraries [here](#)

Manual Creation of Agent User Record

The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with the following items: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets (selected), Custom Code, Custom Permissions, and Enablement Sites (myTrailhead). The main content area displays the 'Permission Sets' page for 'Agentforce SDR agent'. A modal dialog box in the center of the screen shows the message 'Your selections were saved.' with an 'OK' button. The background page shows the 'Data Cloud Data Space Management' section with a table of 'Data Spaces'.

Enabled	Data Space Name
<input checked="" type="checkbox"/>	default



Make sure your agent has access to the default Data Space

Confirm your selections were saved.



Find more detailed information on setting up and troubleshooting Data Libraries [here](#)

Manual Creation of Agent User Record

The screenshot displays the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, Custom Permissions, Enablement Sites (myTrailhead), and Content Permissions Assistant. The main content area is titled 'Permission Sets' and shows the 'Agentforce SDR agent' permission set. Below the title, there is a search bar and buttons for 'Find Settings...', 'Clone', 'Manage Assignments', and 'View Summary'. The 'Data Cloud Data Space Management' section is active, showing a table of 'Data Spaces'. The table has one row with 'Data Space Name' as 'default'. The page also includes a 'Video Tutorial' link and a 'Page 1 of 1' indicator.



Make sure your agent has access to the default Data Space

Now when you go to Agentforce SDR Agent Permission Set, you can see that “default” is listed under Data Space and this step is successful.



Find more detailed information on setting up and troubleshooting Data Libraries [here](#)

Manual Creation of Agent User Record

Setup

Home

Object Manager

Search Setup

Star

Plus

Shield

Question

Settings

Notifications

Profile

Search sdr

Agentforce for Sales

Agentforce SDR

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

Agentforce SDR Setup

When you turn on Agentforce SDR, control the behavior of your Agentforce SDR agents by completing the configuration steps below.

SDR prospecting at scale, 24/7.

Learn More

You don't have the required permissions for one or more setup steps. Ask your Salesforce admin for permission.

Step 1: Enable Agentforce SDR

Active

Step 2: Create an SDR Agent User

Your SDR agent will operate as a user in Salesforce, with the same reporting, record keeping, and management as other users. To proceed, complete the following steps in order.

Create an SDR Agent User Record

Create a user record to let your SDR agent work in your organization, with full reporting capabilities. The Name and Company Name fields are required on this user record and will be visible to each outreach recipient in all AI disclosures and email signatures. Learn more.

Go to User Setup

Assign Required Permissions to the SDR Agent User

The SDR agent user needs the Agentforce SDR agent permission set to work in your organization.

Go to Permission Sets

Configure Einstein Activity Capture (EAC)

Create an EAC configuration and enroll your SDR agent user record to the new configuration.

Go to EAC Settings



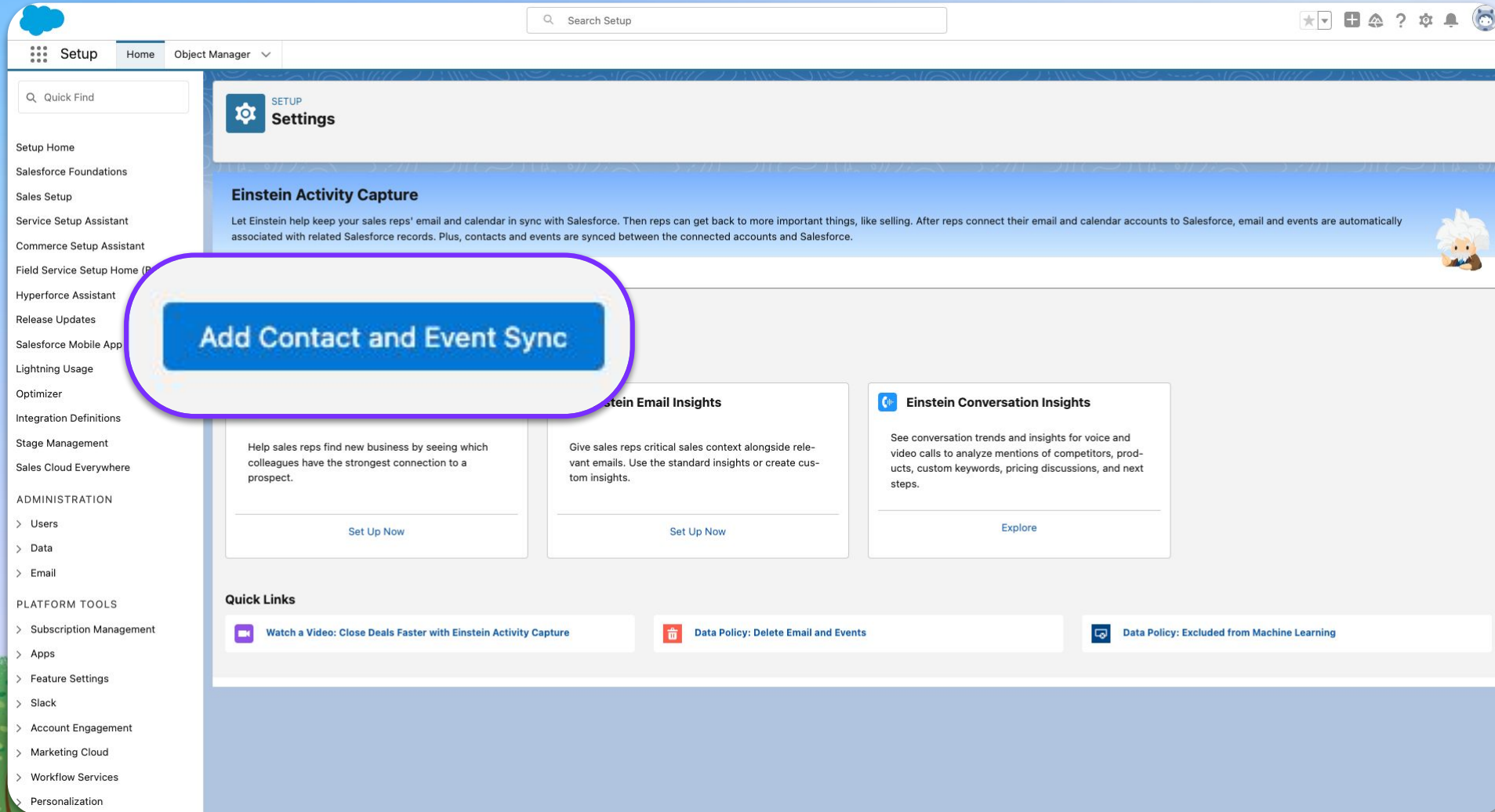
Add the SDR Agent to Einstein Activity Capture

EAC lets your agent access its inbox using your email application and ensures its emails are captured in Salesforce. This gives you direct visibility into all of your agent's activities. The agent uses EAC when generating outreach and reply emails.

In Agentforce SDR Setup, navigate to Step 2: Create an SDR User.

Click **Go to EAC Settings** to finish EAC setup.

Manual Creation of Agent User Record



Add the SDR Agent to Einstein Activity Capture

On the Einstein Activity Capture Setup page, click Add **Contact and Event Sync**.

Select your **Email and Calendar** service and select the user connection preference.

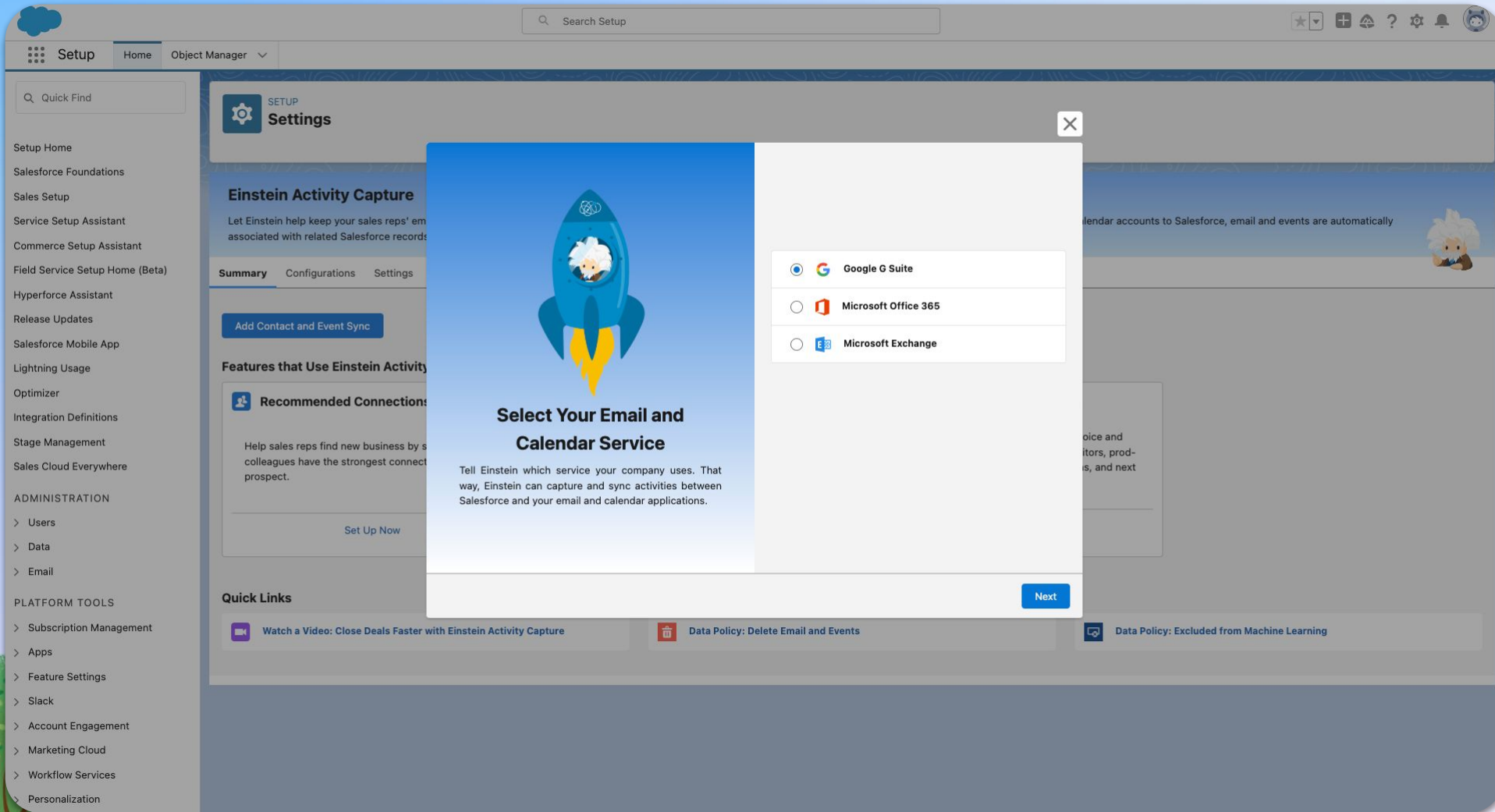
Enter a name for this new EAC configuration, and click Next.

Verify all the settings and edit if needed.



Admin should go to EAC settings and change the org default sharing to Public to guarantee that anyone added to config can see EAC activity timeline

Manual Creation of Agent User Record



Add the SDR Agent to Einstein Activity Capture

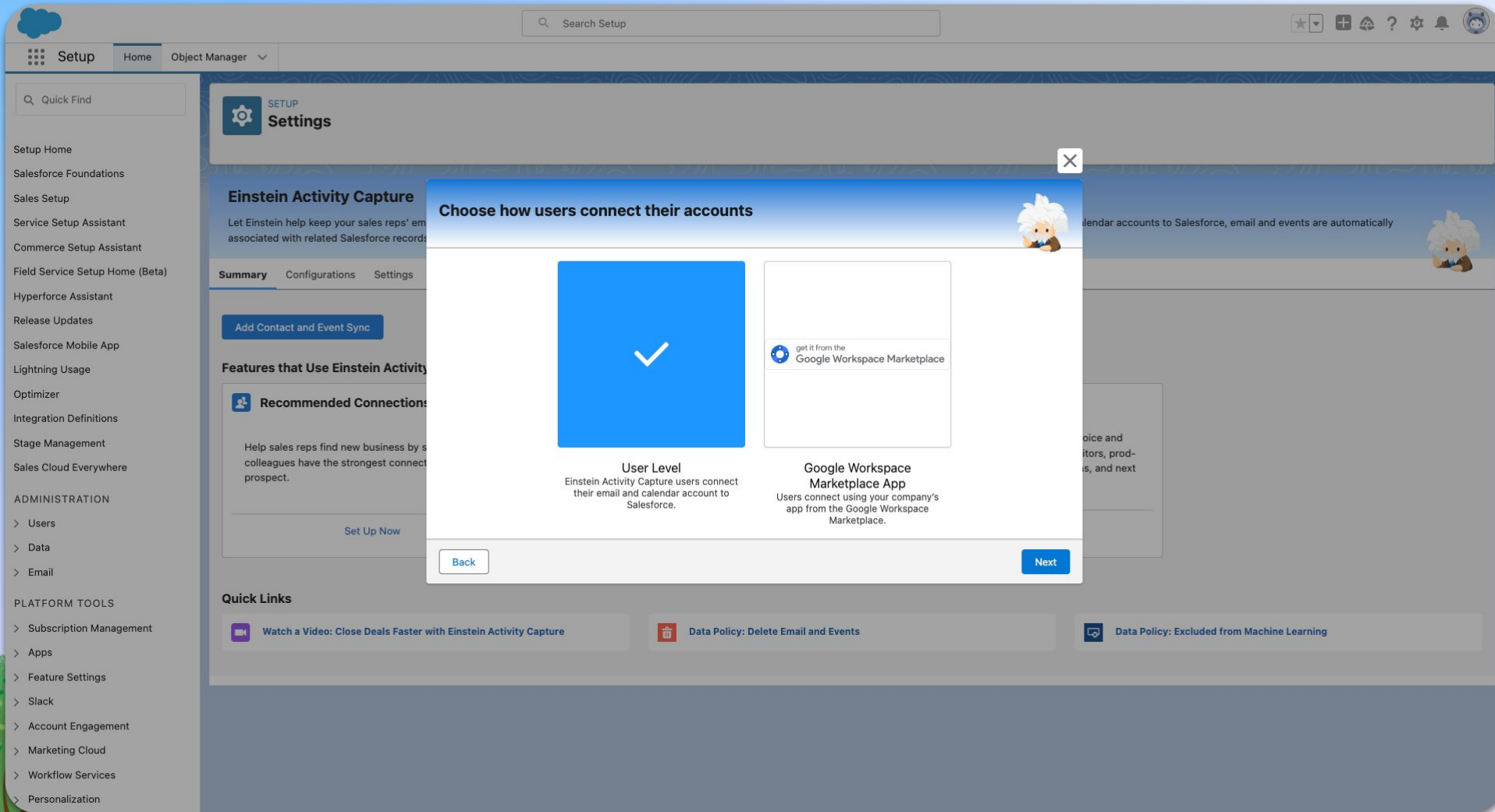
On the Einstein Activity Capture Setup page, click Add **Contact and Event Sync**.

Select your **Email and Calendar** service and select the user connection preference.

Enter a name for this new EAC configuration, and click Next.

Verify all the settings and edit if needed.

Manual Creation of Agent User Record



Add the SDR Agent to Einstein Activity Capture

Select the user connection preference.

Enter a name for your EAC configuration, and click Next.

Verify all the settings and edit if needed.



Admins should select “user level” auth for SDR Agent user. Org-level Auth for EAC will cause the SDR Agent to not work properly.

Manual Creation of Agent User Record

The screenshot displays the Salesforce Setup interface. The left sidebar contains navigation links such as Setup Home, Salesforce Foundations, Sales Setup, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Integration Definitions, Stage Management, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Subscription Management, Apps, Feature Settings, Slack, Account Engagement, Marketing Cloud, Workflow Services, Personalization). The main content area is titled 'Einstein Activity Capture' and includes a description: 'Let Einstein help keep your sales reps' email and calendar in sync with Salesforce. Then reps can get back to more important things, like selling. After reps connect their email and calendar accounts to Salesforce, email and events are automatically associated with related Salesforce records.' Below this is a 'Summary' tab with a 'Set Up Now' button. A modal window titled 'Name your Configuration' is open, prompting the user to 'Give your configuration a unique name and describe what it does.' The modal contains fields for 'Name' (with 'Email Configuration' entered) and 'Description', an 'Active' checkbox (checked), and 'Back' and 'Next' buttons. A progress bar at the bottom of the modal shows the current step. The background page also features a 'Recommended Connections' section and 'Quick Links' at the bottom.



Add the SDR Agent to Einstein Activity Capture

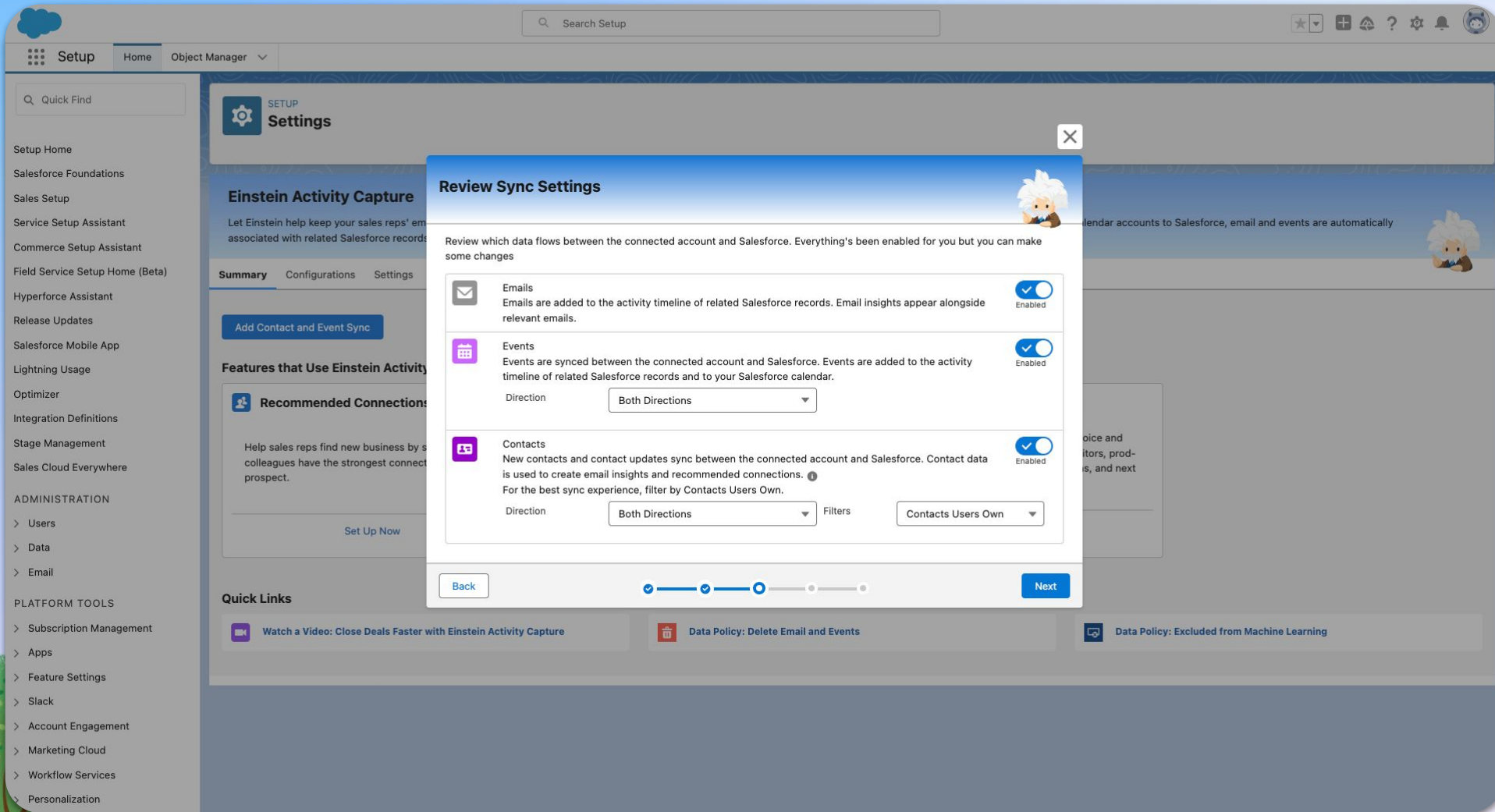
Enter a name and optional description for your EAC configuration, and click Next.

Verify all the settings and edit if needed.



Admin should go to EAC settings and change the org default sharing to Public to guarantee that anyone added to config can see EAC activity timeline

Manual Creation of Agent User Record



Add the SDR Agent to Einstein Activity Capture

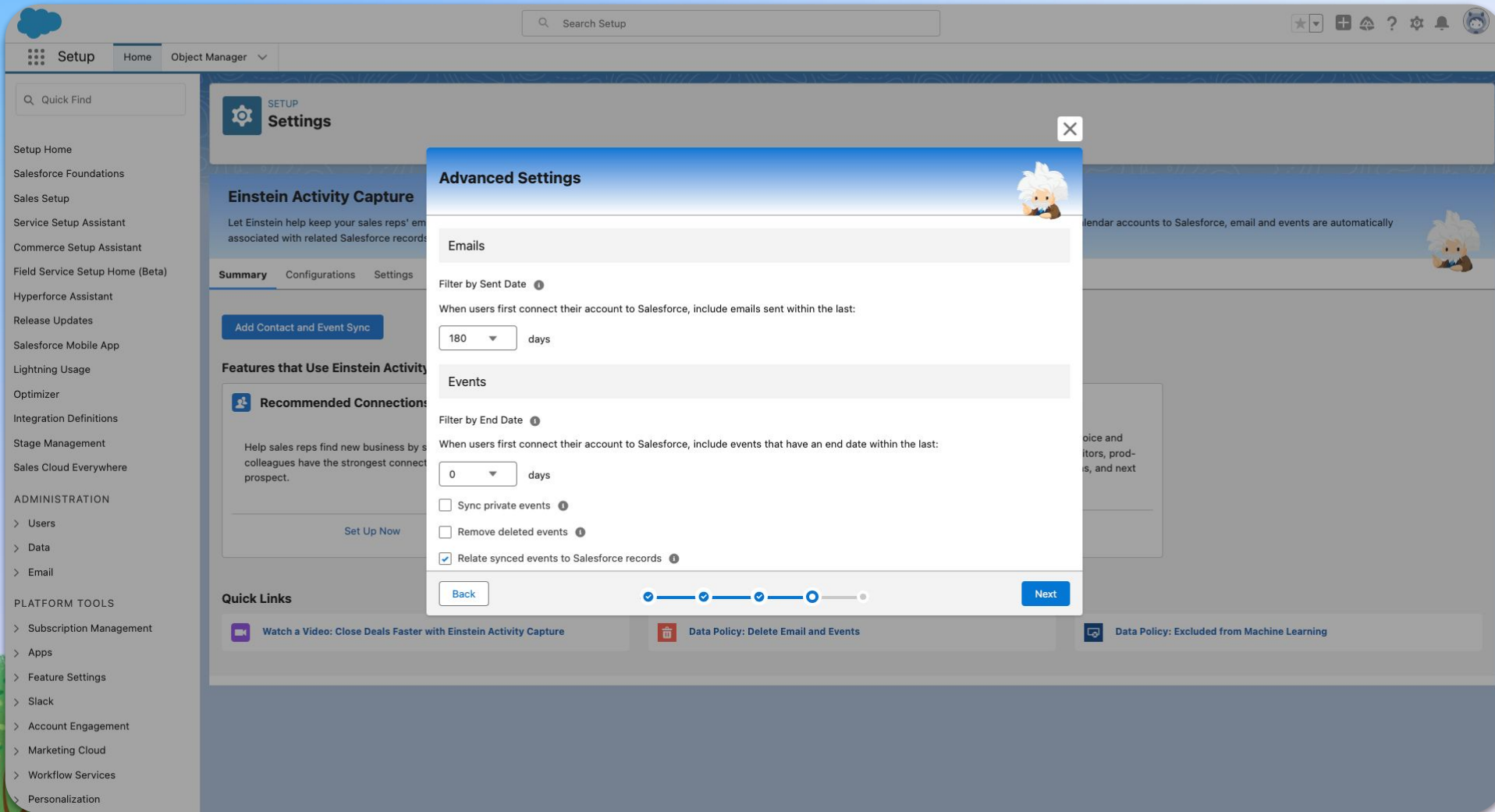
Verify all the settings and edit if needed. Email sync is required for Agentforce SDR.



Admin should go to EAC settings and change the org default sharing to Public to guarantee that anyone added to config can see EAC activity timeline

[Salesforce Help: Create an SDR Agent User Record](#)

Manual Creation of Agent User Record



Add the SDR Agent to Einstein Activity Capture

Verify all the settings and edit if needed.



Admin should go to EAC settings and change the org default sharing to Public to guarantee that anyone added to config can see EAC activity timeline

[Salesforce Help: Create an SDR Agent User Record](#)
[Salesforce Help: Create a Configuration for Einstein Activity Capture](#)

Manual Creation of Agent User Record

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'Einstein Activity Capture' settings. A modal window titled 'Add Users and Profiles' is open, showing a search bar with 'Users' selected. Below the search bar, there are two lists: 'Available' and 'Selected'. The 'Available' list contains 'Cindy Central [Einstein Activity Capture] [Inbox]' and 'Einstein User [Einstein Activity Capture] [Inbox]'. The 'Selected' list contains 'SDR Agent [Einstein Activity Capture] [Inbox]'. A green checkmark icon is visible in the top right corner of the modal. The bottom of the modal has 'Back' and 'Next' buttons. The background shows the 'Einstein Activity Capture' settings page with tabs for Summary, Configurations, and Settings.

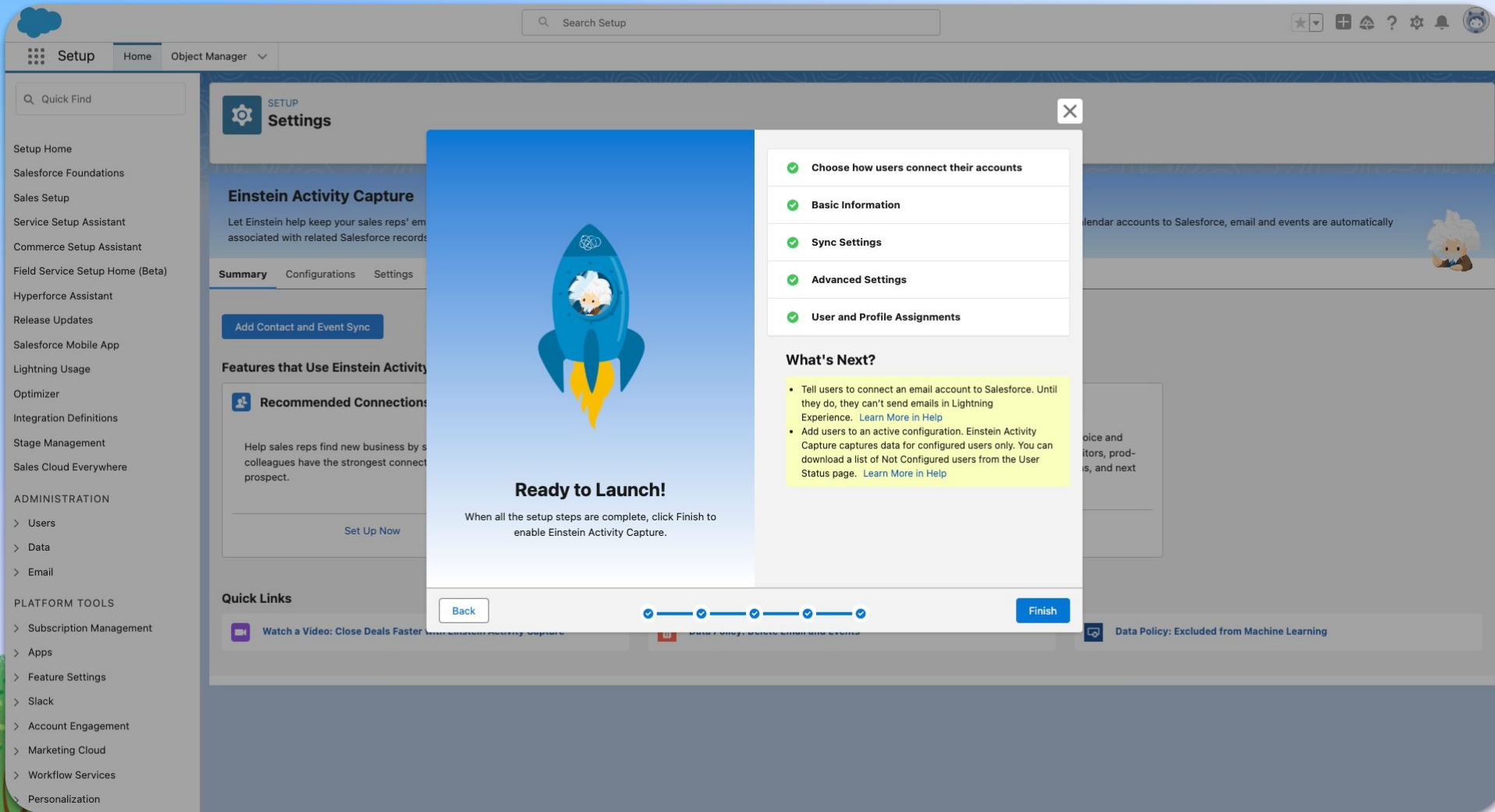


Add the SDR Agent to Einstein Activity Capture

On the EAC Add Users and Profiles page, select the Agentforce SDR agent you've created from the Available list and move it to the Selected list, using the right arrow.

Click Finish.

Manual Creation of Agent User Record



Add the SDR Agent to Einstein Activity Capture

With all the agent's EAC settings completed, you're almost done.

Click **Finish**.

Manual Creation of Agent User Record

The screenshot displays the Salesforce Setup interface. At the top, a green notification bar states "Configuration 'Email Configuration' was created". The left sidebar contains a "Quick Find" search bar and a list of setup categories: Setup Home, Salesforce Foundations, Sales Setup, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Integration Definitions, Stage Management, Sales Cloud Everywhere, ADMINISTRATION (with sub-items Users, Data, Email), and PLATFORM TOOLS (with sub-items Subscription Management, Apps, Feature Settings, Slack, Account Engagement, Marketing Cloud, Workflow Services, and Personalization). The main content area is titled "Einstein Activity Capture" and includes a description: "Let Einstein help keep your sales reps' email and calendar in sync with Salesforce. Then reps can get back to more important things, like selling. After reps connect their email and calendar accounts to Salesforce, email and events are automatically associated with related Salesforce records. Plus, contacts and events are synced between the connected accounts and Salesforce." Below this, there are tabs for "Summary", "Configurations", "Settings", and "Excluded Addresses". A blue button labeled "Add Contact and Event Sync" is visible. The "Features that Use Einstein Activity Capture" section contains three cards: "Recommended Connections" (with a "Set Up Now" link), "Einstein Email Insights" (with a "Set Up Now" link), and "Einstein Conversation Insights" (with an "Explore" link). The "Quick Links" section at the bottom features three links: "Watch a Video: Close Deals Faster with Einstein Activity Capture", "Data Policy: Delete Email and Events", and "Data Policy: Excluded from Machine Learning".



Add the SDR Agent to Einstein Activity Capture

Confirm that the Email Configuration is successfully created.



Users with the admin profile can create or edit an Einstein Activity Capture configuration.

Agentforce for Sales Development Permissions

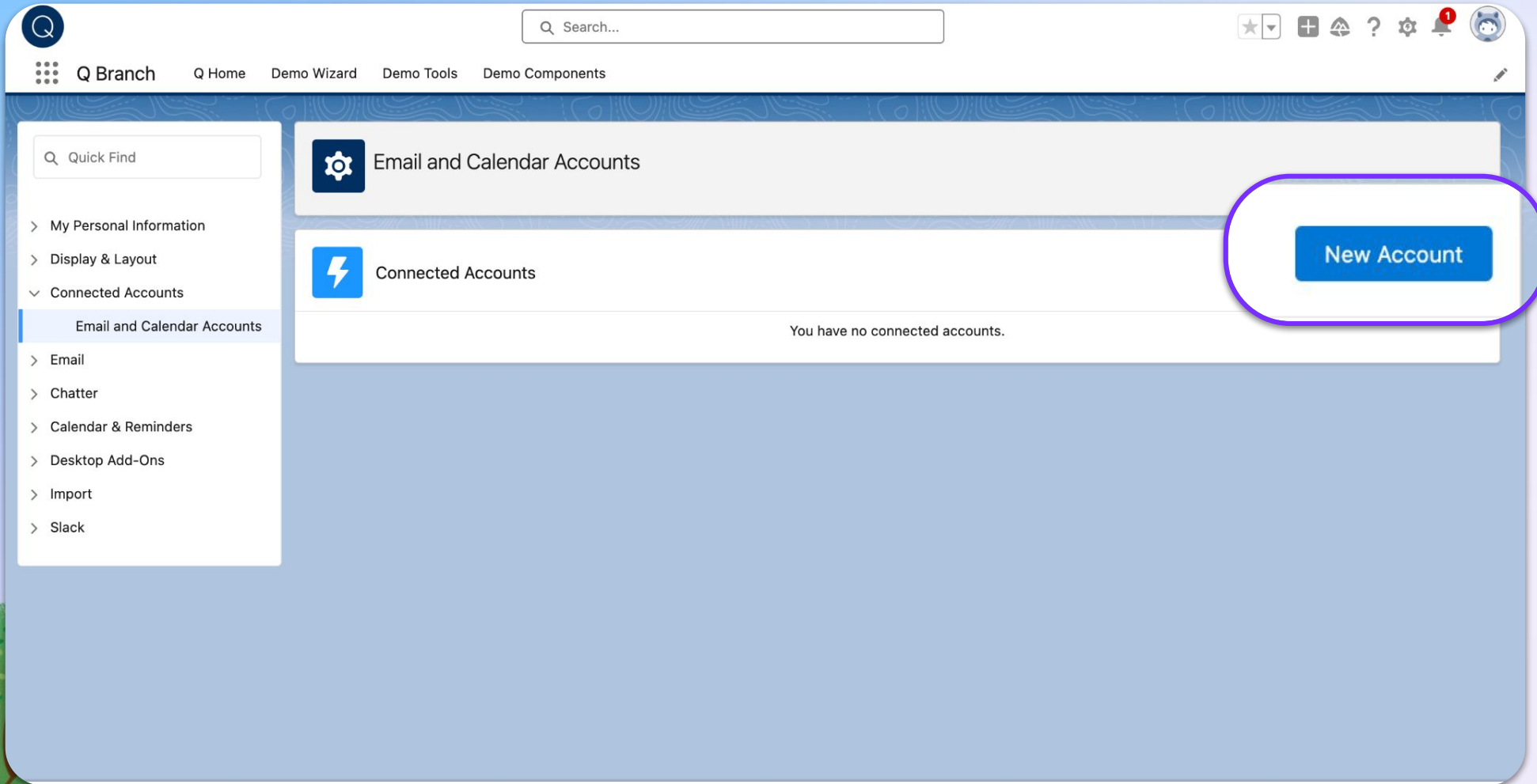
[SDR Agent Permissions Set Help](#)

	Permission Set(s)	Description
SDR Agent User	<ul style="list-style-type: none">Agentforce SDR Agent	Allows the SDR Agent [user record] to reach out to prospects automatically with full reporting capabilities
Sales Manager / Admin	<ul style="list-style-type: none">Configure Agentforce SDR AgentSales Engagement Cadence CreatorAutomated Actions UserData Cloud User	Allow sales manager to view and configure the SDR Agent in Agent Builder, manage, and deploy SDR Agent for prospect outreach
Sales User	<ul style="list-style-type: none">Use Agentforce SDR AgentSales Engagement UserAutomated Actions User	Allow sales users to access and interact with Agentforce SDR, and send leads to SDR Agent

How to Enable Salesforce Inbox



Connect Salesforce Inbox

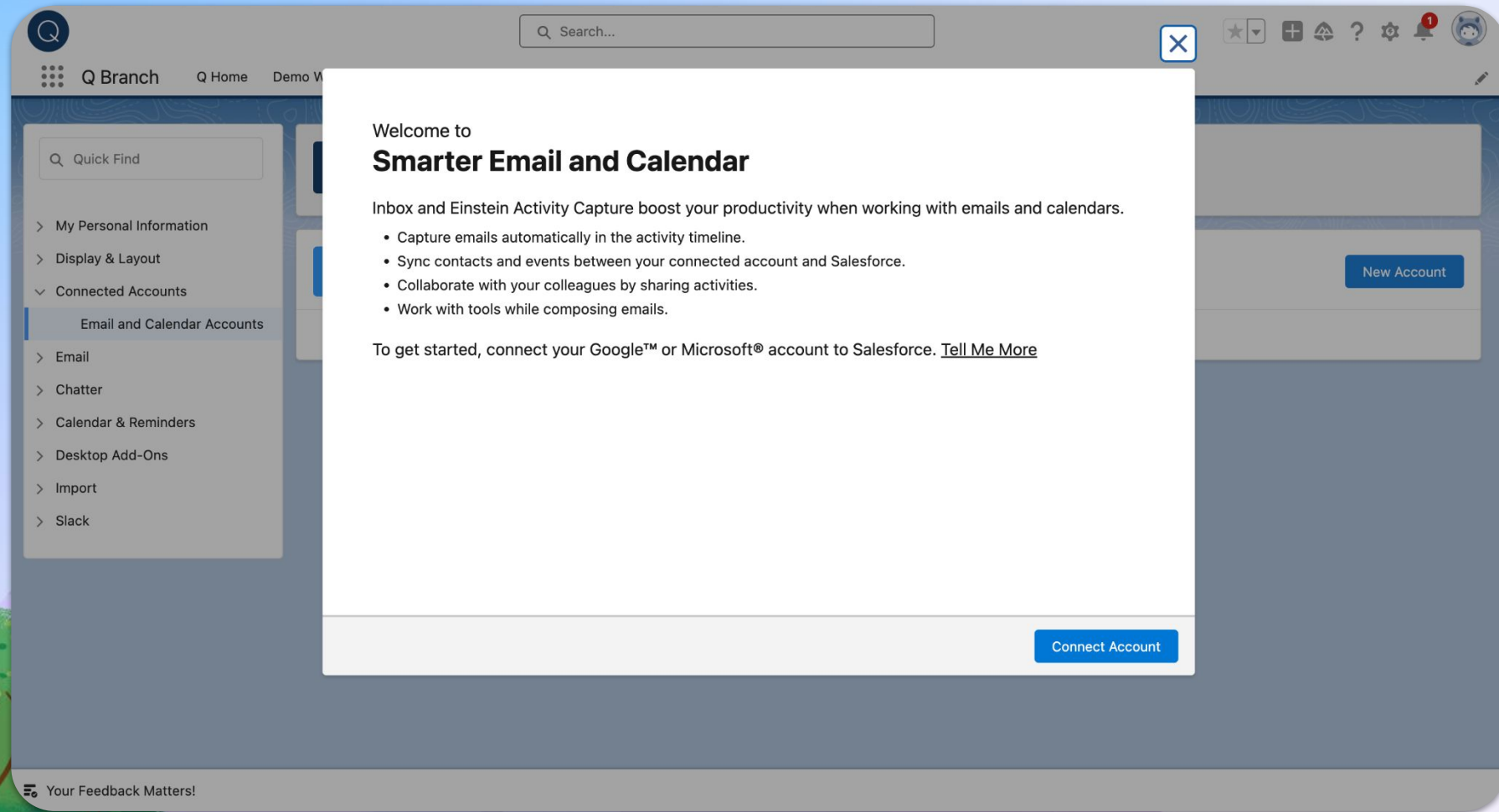


Connect Sales User Email Accounts to Salesforce Inbox

To let sales users view, edit reschedule, or cancel SDR agent emails from the Activity Timeline of leads, be sure each user has connected their email account in their Salesforce user profile.

From the user's Personal Settings, they can click **Email and Calendar Accounts**.

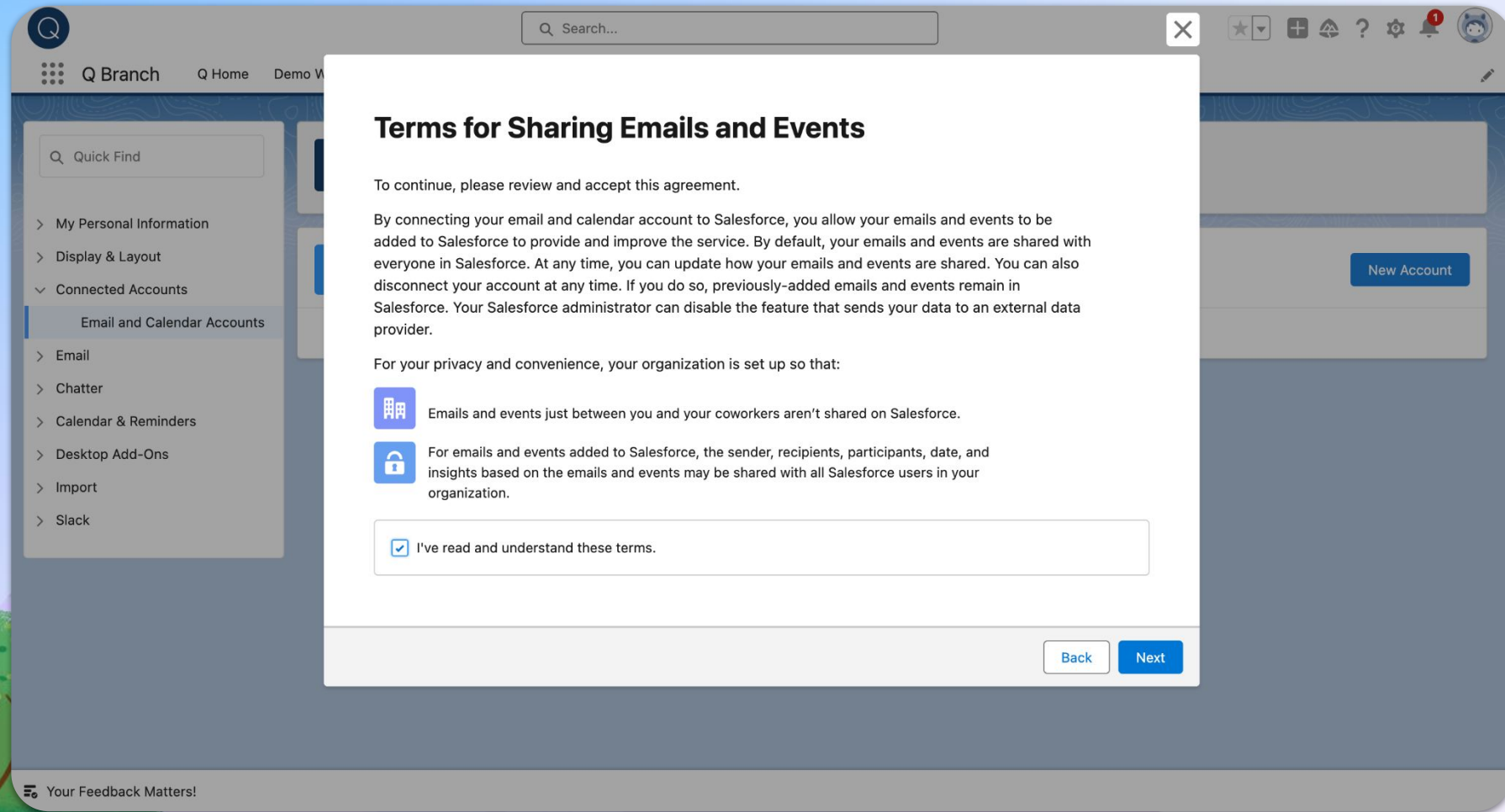
Connect Salesforce Inbox



Connect User Email Accounts to Salesforce Inbox

To get started, users click **New Account** and then **Connect Account**.

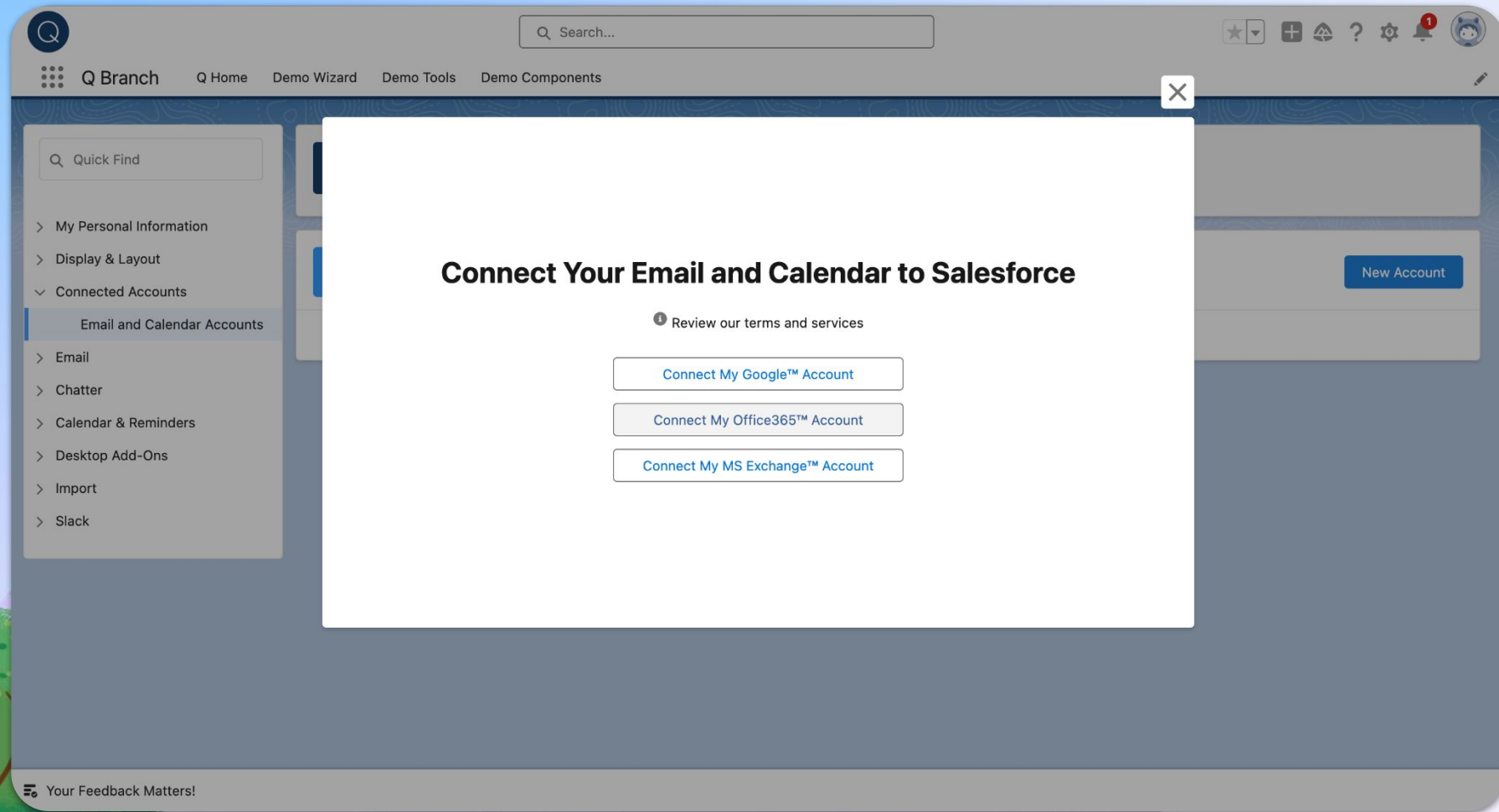
Connect Salesforce Inbox



Connect User Email Accounts to Salesforce Inbox

[Read the terms and then click Next.](#)

Connect Salesforce Inbox



Connect User Email Accounts to Salesforce Inbox

Click the email and calendar service used by your company.

Connect Salesforce Inbox

 Sign in with Google




Salesforce.com wants access to your Google Account


 prmtester360@gmail.com


Select what [Salesforce.com](#) can access

☐ Select all

 Read, compose, send, and permanently delete all your email from Gmail. [Learn more](#) ☐


 See and download all your Google Drive files. [Learn more](#) ☐

 See, edit, download, and permanently delete your contacts. [Learn more](#) ☐

 See, edit, share, and permanently delete all the calendars you can access using Google Calendar. [Learn more](#) ☐

Because you're using Sign in with Google, Salesforce.com will be able to

 Associate you with your personal info on Google ☒

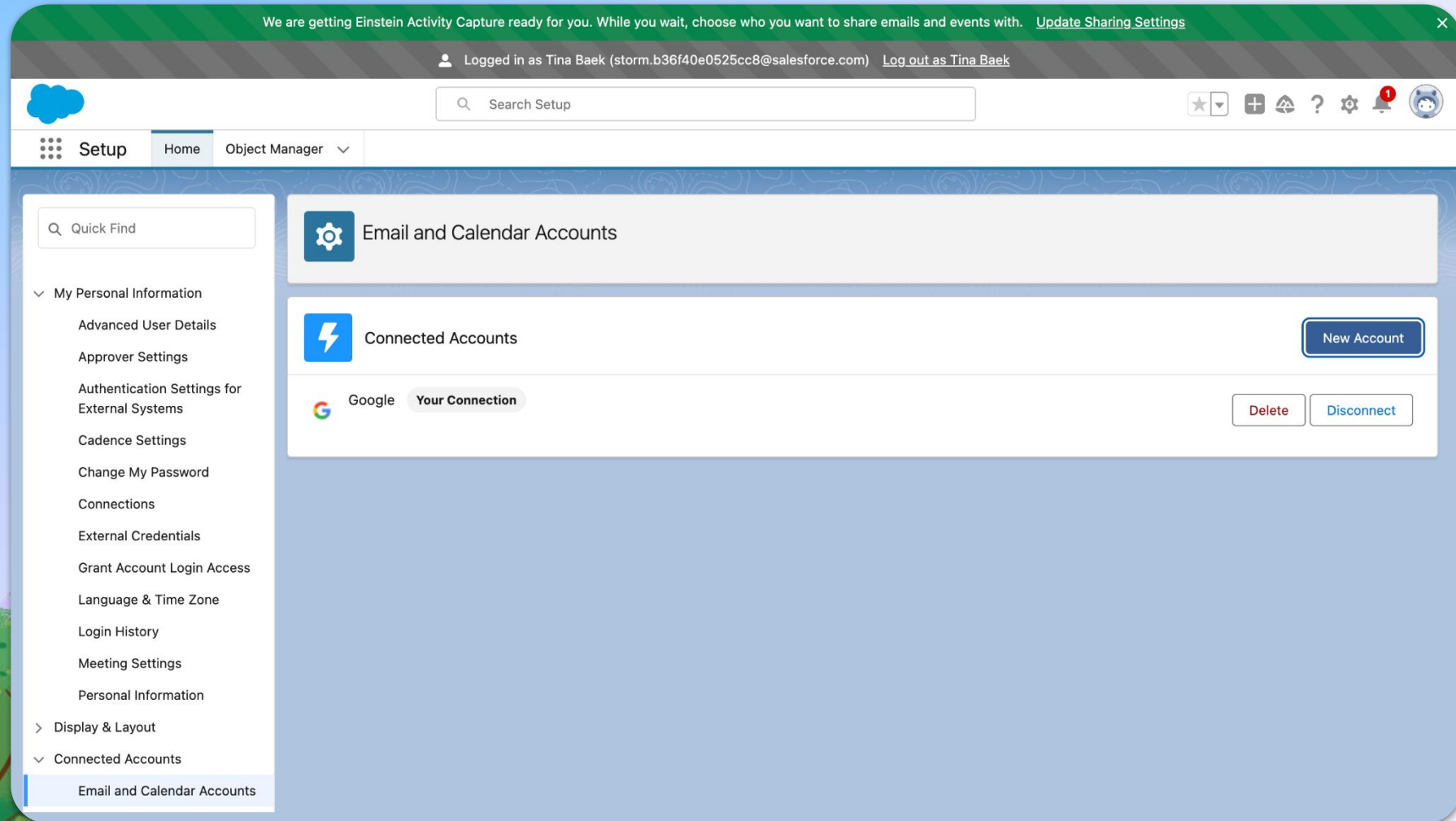
 See your personal info, including any personal info you've made publicly available ☒



Connect User Email Accounts to Salesforce Inbox

Select the checkboxes for Email and Calendars. Then click [Finish](#).

Connect Salesforce Inbox



Connect User Email Accounts to Salesforce Inbox

The newly connected account appears in the user's profile.

Grant Sales Users Access to Inbox

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with options like Setup Home, Salesforce Foundations, Sales Setup, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Integration Definitions, Stage Management, Sales Cloud Everywhere, and ADMINISTRATION. Under ADMINISTRATION, 'Users' is expanded, showing 'Permission Set Groups', 'Permission Sets', 'Profiles', and 'Public Groups'. The main content area is titled 'Permission Sets' and shows a specific permission set: 'Inbox Without Einstein Activity Capture'. A search bar 'Find Settings...' is present. Below it, three buttons are visible: 'Clone', 'Manage Assignments' (highlighted with a purple box), and 'View'. The 'Permission Set Overview' section includes a table with columns: Description (Access to Inbox without Einstein Activity Capture), License (Inbox), Session Activation Required (checkbox), and Permission Set Groups Added To (0). The 'API Name' is 'InboxWithoutEinsteinActivityCapture' and the 'Namespace Prefix' is 'force'. The 'Created By' is 'salesforce.com, inc., 1/23/2025, 11:21 AM' and the 'Last Modified By' is 'salesforce.com, inc., 2/7/2025, 8:46 PM'. The 'Apps' section lists various settings: Object Settings, App Permissions, Data Cloud Data Space Management, Flow Access, External Credential Principal Access, and Data Category Visibility. A 'Learn More' link is provided for settings that apply to Salesforce apps.



Grant Sales Users Access to Salesforce Inbox

Confirm that at least one of the permission sets to give access to Salesforce Inbox has been assigned to the sales user.

These permission sets include:

- [Inbox With Einstein Activity Capture](#)
- [Inbox Without Einstein Activity Capture](#)
- [Inbox Included](#)
- [Sales Cloud Included Bundle](#)

[Go back to Agentforce SDR Setup Page.](#)



If the sales user does not have any of the permissions assigned, we recommend selecting the [Inbox Without Einstein Activity Capture](#) permission set.

[Salesforce Help: Grant Sales Users Access to Agentforce SDR](#)
[Salesforce Help: SDR Agent Permissions Sets](#)
[Connect Your Email and Calendar to Salesforce with Einstein Activity Capture or Inbox](#)

Search Setup

Setup Home Object Manager

Q sdr

Agentforce for Sales

Agentforce SDR

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

Agentforce SDR Setup

When you turn on Agentforce SDR, control the behavior of your Agentforce SDR agents by completing the configuration steps below.

SDR prospecting at scale, 24/7. [Learn More →](#)

⚠ You don't have the required permissions for one or more setup steps. Ask your Salesforce admin for permission.

- > Step 1: Enable Agentforce SDR Active
- > Step 2: Create an SDR Agent User
- ✓ Step 3: Grant Access to Your SDR Agent
 - Identify Managers for Your SDR Agent**
To give you and your Salesforce admins, sales ops, or managers access to configure and assign your SDR agent to users, assign the Configure Agentforce SDR Agent, Sales Engagement Cadence Creator, and Automated Actions User permission sets. [Learn More in Help.](#) [Go to Permission Sets](#)
 - Assign Users to Your SDR Agent (Optional)**
To give users access to assign leads to the SDR agent, assign the Use Agentforce SDR Agent, Sales Engagement User, and Automated Actions User permission sets. [Learn More in Help.](#) [Go to Permission Sets](#)
- > Step 4: Configure and Activate Your SDR Agent



Grant Sales Users Access to Agentforce SDR (optional)

To assign leads to your agent, update/override upcoming communications, and see the agent's activity, members of your sales team need certain permissions.

In Agentforce SDR Setup, navigate to **Step 3: Grant Sales Users Access to Your SDR Agent**.

To give your sales users permission to use your Agentforce SDR agents, click **Go to Permission Sets**.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Salesforce Foundations, Sales Setup, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Integration Definitions, Stage Management, Sales Cloud Everywhere, and ADMINISTRATION. Under ADMINISTRATION, the 'Users' link is expanded, showing 'Permission Set Groups' and 'Permission Sets'. The main content area is titled 'SETUP Permission Sets' and shows the 'Assigned Users' section for the 'Use Agentforce SDR Agent' permission set. A purple circle highlights the 'Add Assignments' button. Below the button is a table with columns: Full Name, Role, Active, Profile, and Expires On. The table currently displays 'No records to display.' and has 'Add Assignments' and 'Remove Assignments' buttons at the bottom.



Grant Sales Users Access to Agentforce SDR

Select the user that you want to assign the **Use Agentforce SDR Agent** permission set to. Click **Assign**. The **Use Agentforce SDR Agent** permission set allows human users to access and interact with Agentforce SDR.



To send leads to the SDR agent, sales reps need additional permissions.

- Sales Engagement User
- Automated Actions User

Setup

Home

Object Manager

Quick Find

Setup Home

Salesforce Foundations

Sales Setup

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Integration Definitions

Stage Management

Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Search Setup

Star

Plus

Home

Help

Settings

Notifications

Avatar

SETUP

Permission Sets

Assign Users

Active Users

View: Active Users

Edit

Create New View

Help for this Page

A

B

C

D

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U

V

W

X

Y

Z

Other

All

Assign

Cancel

<input type="checkbox"/>	Action	Full Name	Alias	Username	Last Login	Role	Profile
<input type="checkbox"/>	Edit	Acme, Xavier	xavi	xavier.acme@storm-b36f40e0525cc8.com		Acme Partners Partner User	SDO-Partners
<input type="checkbox"/>	Edit	Acme, Xavier	Xavier	xavieracme.ng6pouvzswsj@salesforce.com			*Customer Community Plus
<input type="checkbox"/>	Edit	Acme, Yvette	Yvette	yvette.acme@storm-b36f40e0525cc8.com			*Customer Community Plus
<input type="checkbox"/>	Edit	Acme, Yvette	yvet	yvetteacme.8wplepayv6fh.cj2vnlcvvbw@salesforce.com		Acme Partners Partner User	SDO-Partners
<input type="checkbox"/>	Edit	Acme, Zach	Zach	zach.acme@storm-b36f40e0525cc8.com			*Customer Community Plus
<input type="checkbox"/>	Edit	Adams, Mary	Mary	maryadams.gw2ewiobdl2s@salesforce.com		Customer Service Agent	Standard User
<input type="checkbox"/>	Edit	Agent, SDR	sdragent	sdr@tina012325.com			Einstein Agent User
<input type="checkbox"/>	Edit	Austin, Jane	Jane	janeaustin.wgdcogkiihu5@salesforce.com		Customer Service Agent	Standard User
<input type="checkbox"/>	Edit	Baek, Tina	STroo	storm.b36f40e0525cc8@salesforce.com	2/7/2025, 9:09 AM	CEO	System Administrator
<input type="checkbox"/>	Edit	Bailey, Lauren	Lauren	lauren.bailey@storm-b36f40e0525cc8.com		Omega, Inc. Customer User	SDO-Customer Community Plus
<input type="checkbox"/>	Edit	Barnes, Gloria	Gloria	gloriabarnes.ox36yacqkvmd@salesforce.com		Customer Service Agent	Standard User
<input type="checkbox"/>	Edit	Baxter, Larry	lbaxter	larry.baxter@storm-b36f40e0525cc8.com		AUser Customer Person Account	SDO-Customer Community Plus
<input type="checkbox"/>	Edit	Bot, B2B	b2bbot	b2bbot012025035734941020.oizktgcyrmkp@salesforce.com			System Administrator
<input type="checkbox"/>	Edit	Bot, Luna	luna	lunabot012025235917980690.iltq43u0vpo6@salesforce.com			System Administrator
<input type="checkbox"/>	Edit	Bot, Rider	rider	riderbot012025214225495649.3vlt8h0rrfxz@salesforce.com			System Administrator




Grant Sales Users Access to Agentforce SDR

Select the user that you want to assign the **Use Agentforce SDR Agent** permission set to. Click **Assign**. The **Use Agentforce SDR Agent** permission set allows human users to access and interact with Agentforce SDR.



To send leads to the SDR agent, sales reps need additional permissions.

- Sales Engagement User
- Automated Actions User



Search Setup

SetupHomeObject Manager

Quick Find

Setup Home
Salesforce Foundations
Sales Setup
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Integration Definitions
Stage Management
Sales Cloud Everywhere
ADMINISTRATION
Users
Permission Set Groups
Permission Sets

SETUP
Permission Sets

Assignment Summary
Use Agentforce SDR Agent

Permission set Use Agentforce SDR Agent has been assigned to 1 user.

Full Name	Username	User License	Message
Cindy Central	cindy.central@storm-b36f40e0525cc8.com	Salesforce	Success

Help for this Page



Grant Sales Users Access to Agentforce SDR

Confirm that the permission set to Use Agentforce SDR has been assigned to the sales user.

Go back to Agentforce SDR Setup Page.