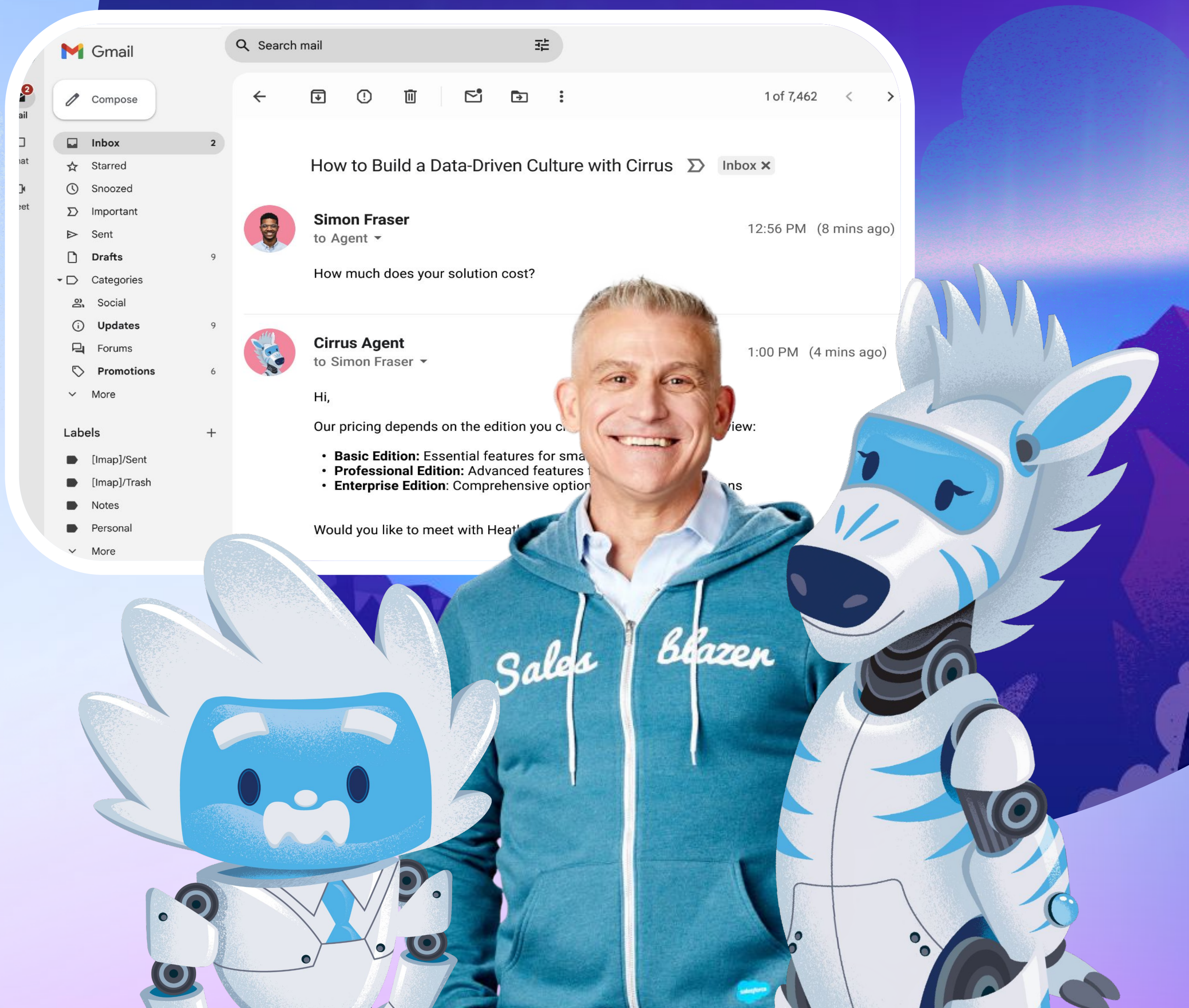
salesforce

Introducing

Agentforce for Sales

Autonomous agents to scale your sales team

May 2025



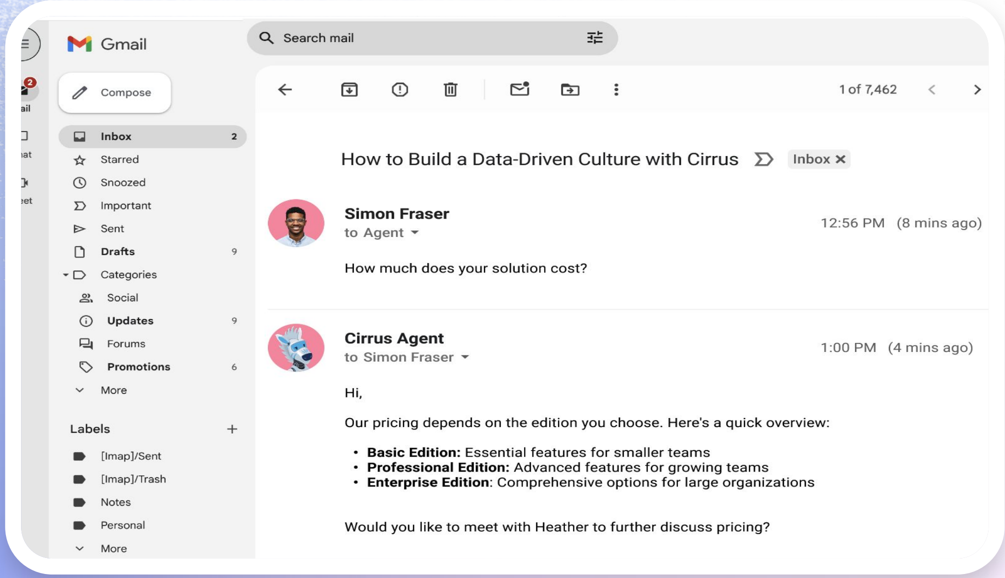
Introducing

Agentforce for Sales

Fuel limitless sales teams with a digital workforce

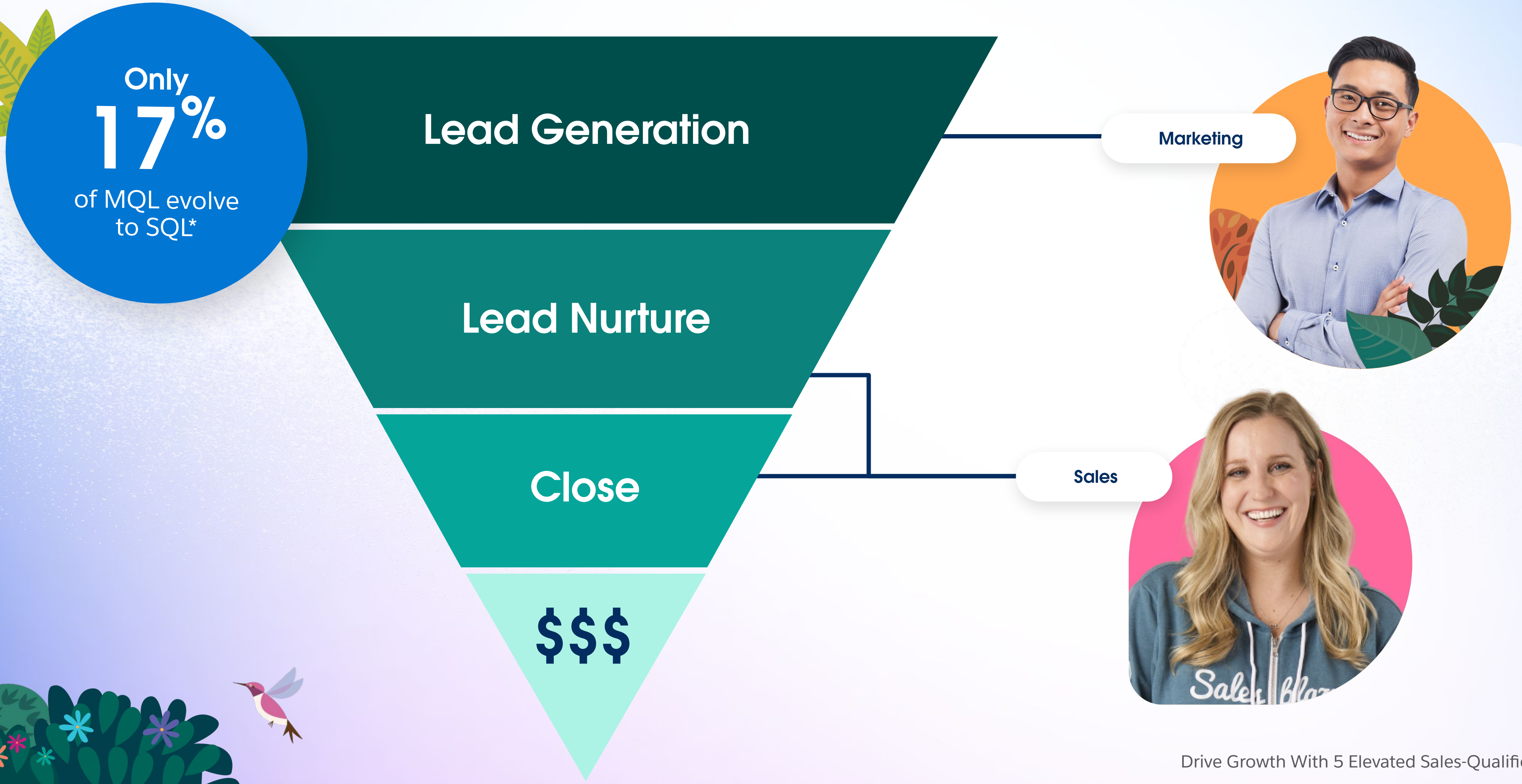
Sales Development

Maximize pipeline by nurturing inbound leads 24/7

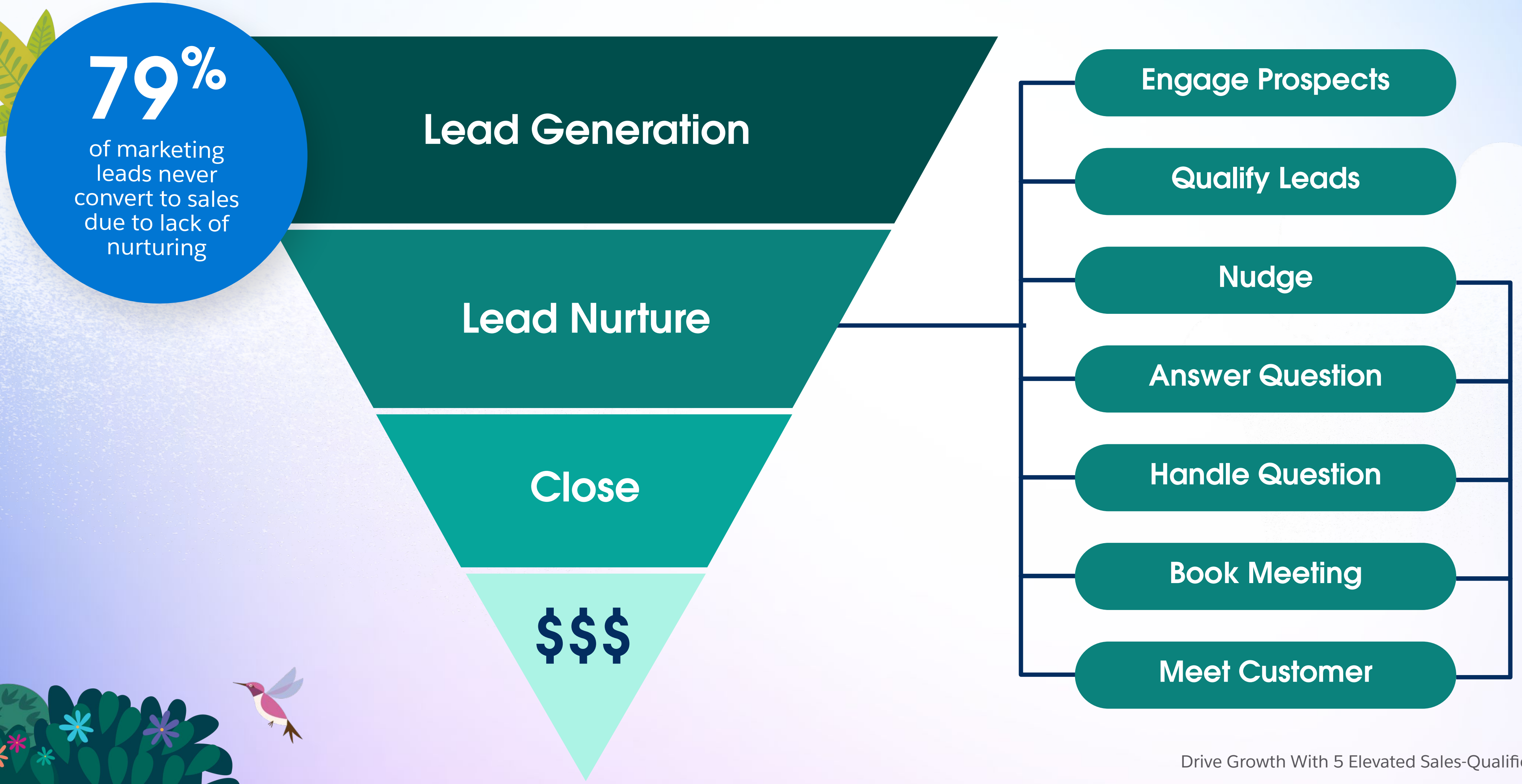


Sellers are wasting time on low quality leads

Not All Leads Are Created Equal



Lead nurturing is challenging



Agentforce

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

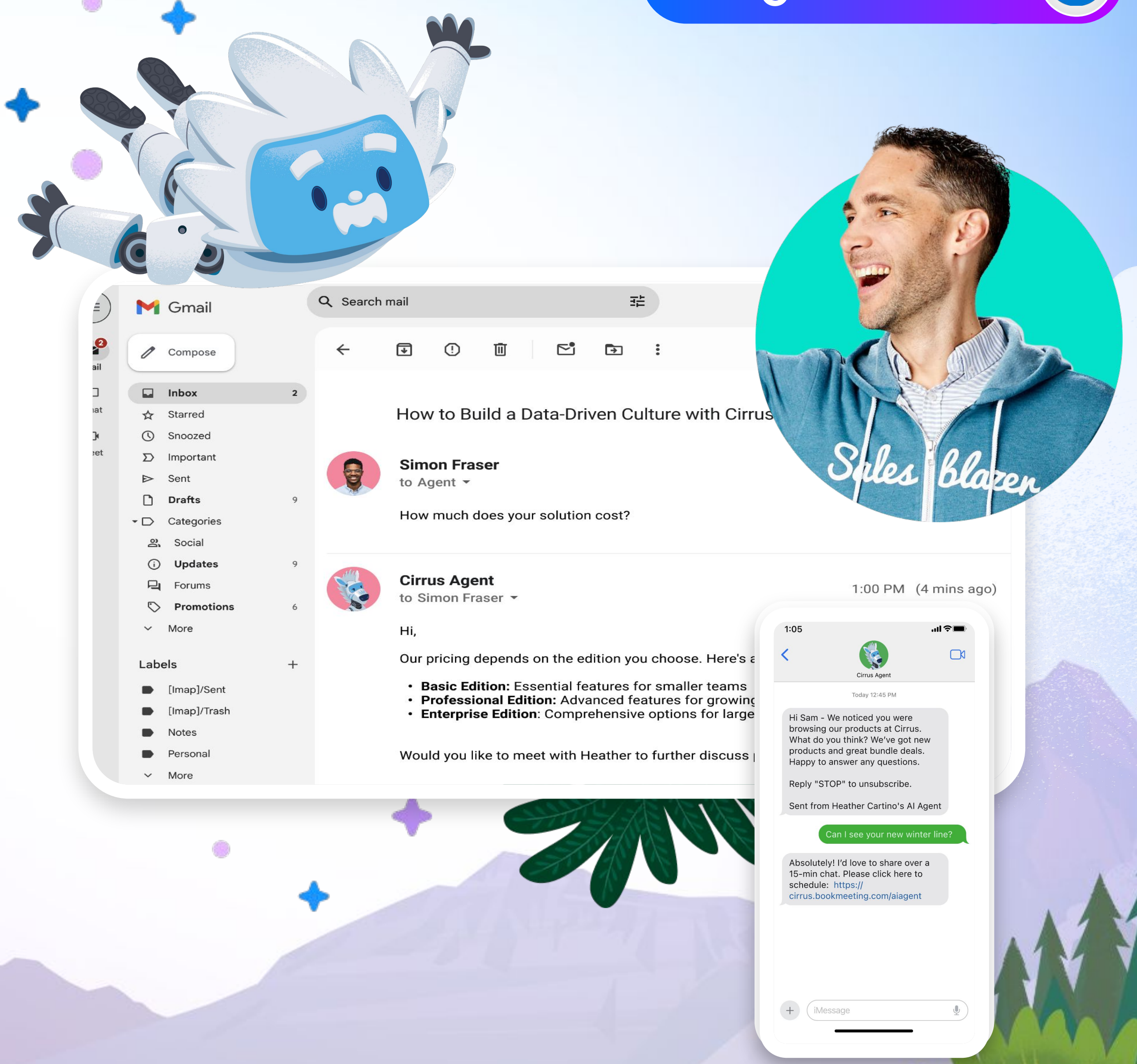
Relevant responses, grounded in your sales and customer data, that resonate with prospects

Automate prospecting with confidence

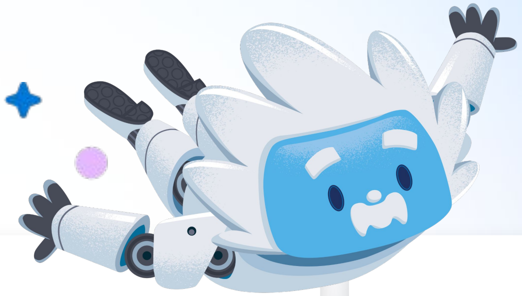
Monitor performance, ensure seamless hand-off from agent to seller, and measure ROI

Easy set up & customization

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



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	Data	Actions	Guardrails	Channel
Nurture inbound leads to advance pipeline	CRM & External data	Outreach, answer questions, & book meeting	When & how often to engage which leads	Email

Trust & Security

Agentforce

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 ships with pre-built, out-of-the-box topics, instructions, actions, prompt templates

Agentforce

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 ships with pre-built, out-of-the-box topics, instructions, actions, prompt templates

Agentforce

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 ships with pre-built, out-of-the-box topics, instructions, actions, prompt templates

Sales Development Runtime

Agentforce SDR Agent

Prospect Assignment
(Manual or Automatic)

Prospect

Send Outreach

- Send Initial Outreach Email*
- Send 'x' Nudge Emails*

No Reply

Respond to Prospect

- Send Generic Reply Email*
- Send Meeting Request Email*
- Send Email for Prospect Question*
- Answer Questions with Knowledge

REPLY w/ Question or Meeting Request

Manage Opt-Out

- Opt Out Prospect

REPLY with OPT-OUT request

Agent Topics supported by Instructions

Agent Actions supported by *Prompt Templates

Agent Actions Flow

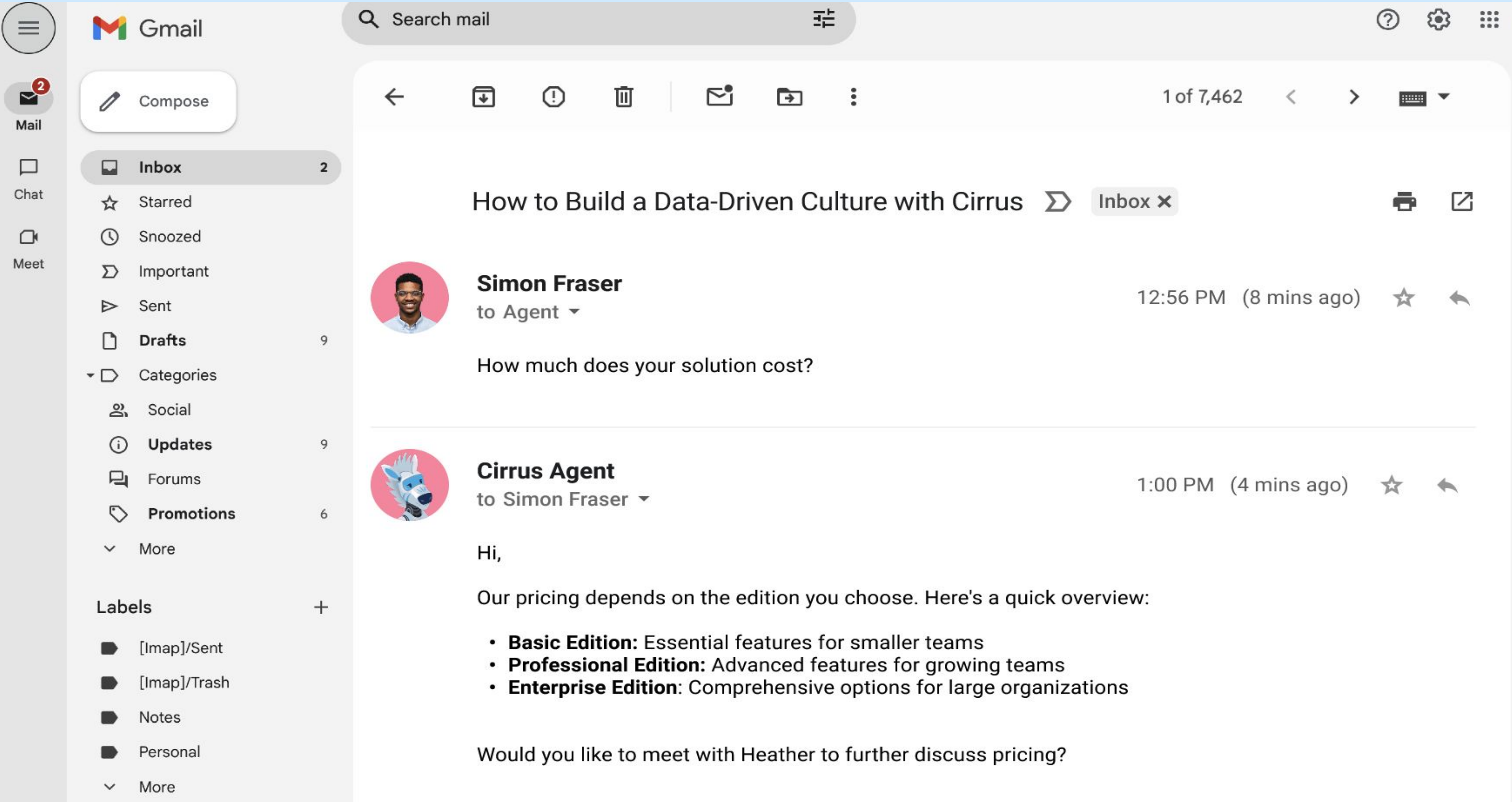
- Initial Outreach is first triggered action after lead is assigned to Agent; 1 hour delay in send
- # of nudge or reply email attempts, time between attempts, and Agent outreach schedule configurable in Agent Builder as engagement rules
- Emails are captured on activity timeline
- A different opt out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

Agentforce

Demo

Sales Development

[Vidyard Link]() to Send to Customer. Name has been updated to Sales Development



Agentforce

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 not using **Activity 360**?	✔	✗
	Do you currently use or are you willing to use **Salesforce Inbox** instead of a third-party booking system t**o 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	• Agentforce SDR Agent	Allows the SDR Agent [user record] to reach out to prospects automatically with full reporting capabilities
Sales Manager / Admin	• Configure Agentforce SDR Agent • Data 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	• Use Agentforce SDR Agent • Inbox Perm ○ 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

Agentforce

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

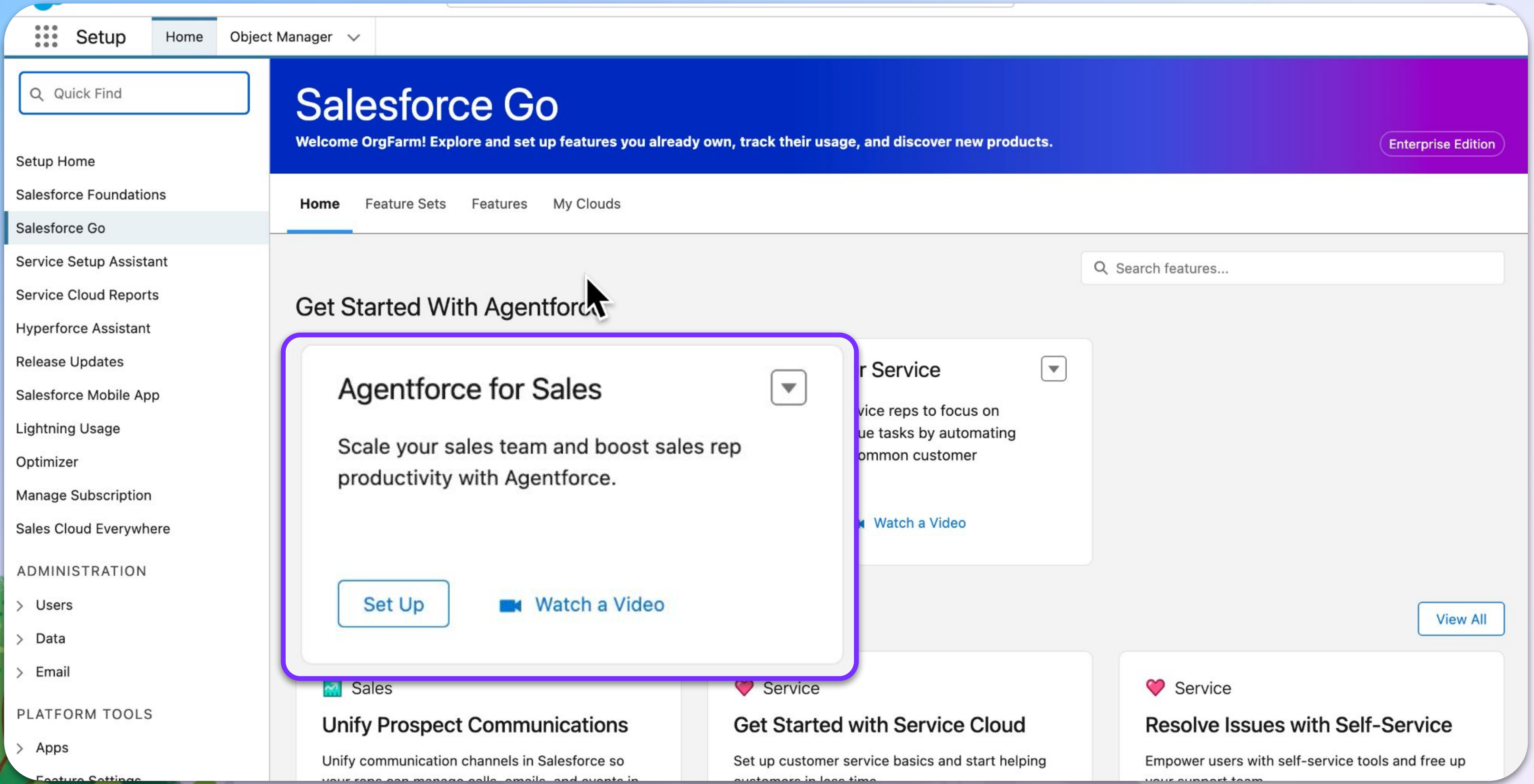
4 Runtime and Monitoring

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

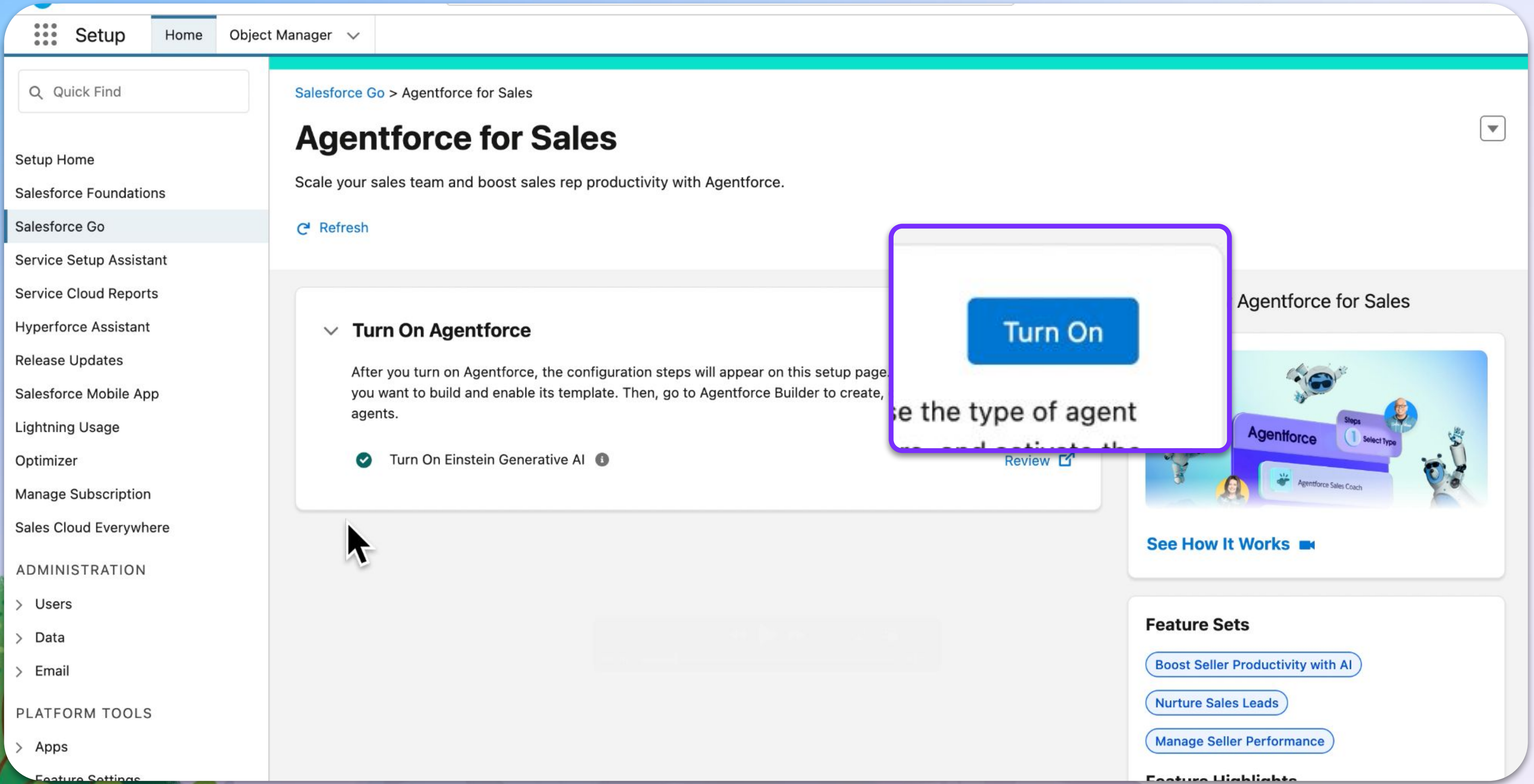


Discover Agentforce for Sales in Salesforce Go

Find Salesforce Go in Setup.

Discover Agentforce for Sales in Go Home.

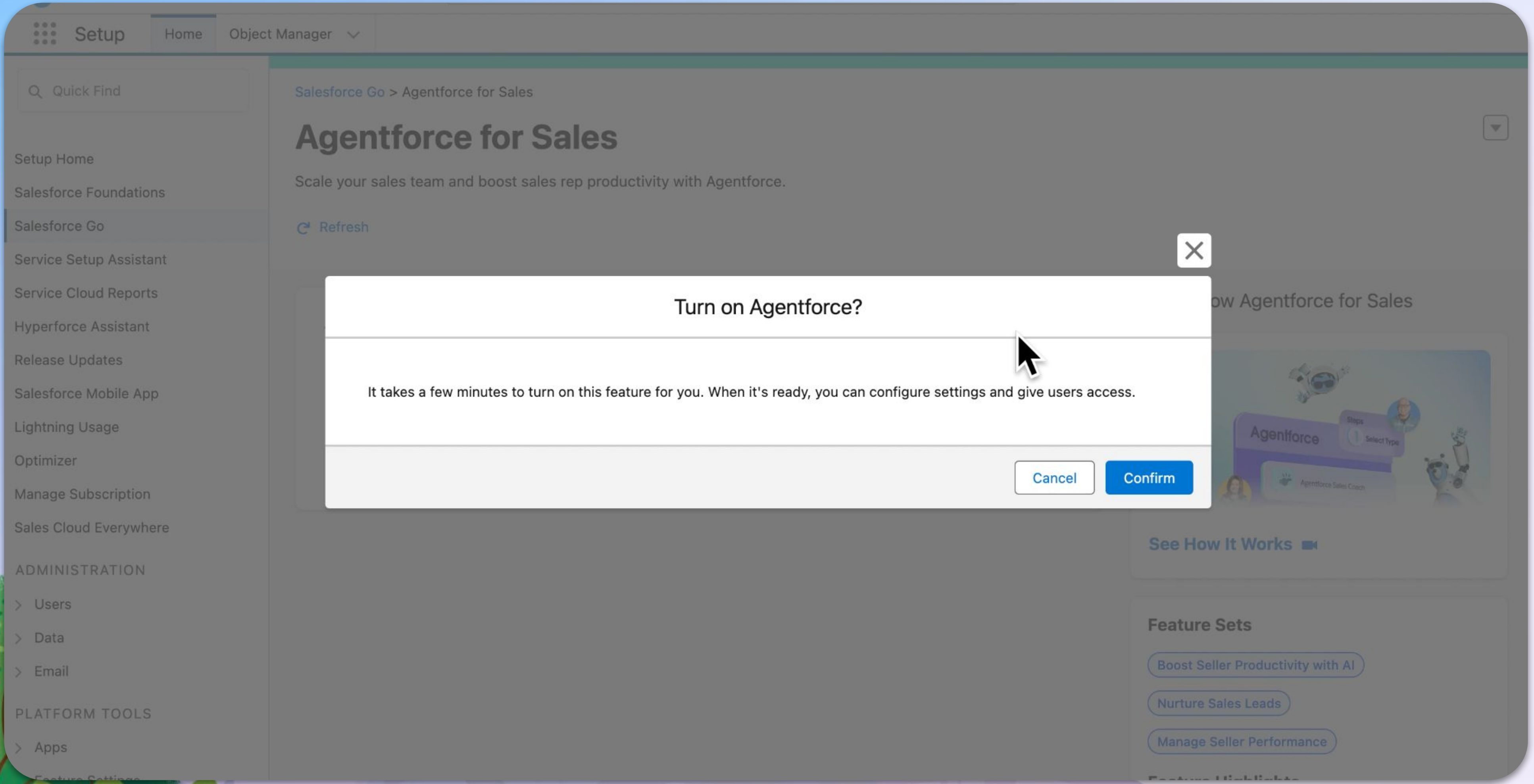
1 Enable Agentforce for Sales
2 Create and Configure
3 Test and Preview
4 Runtime & Monitoring



Discover Agentforce for Sales in Salesforce Go

Turn on Agentforce.

1 **Enable Agentforce for Sales** | 2 Create and Configure | 3 Test and Preview | 4 Runtime & Monitoring



Discover Agentforce for Sales in Salesforce Go

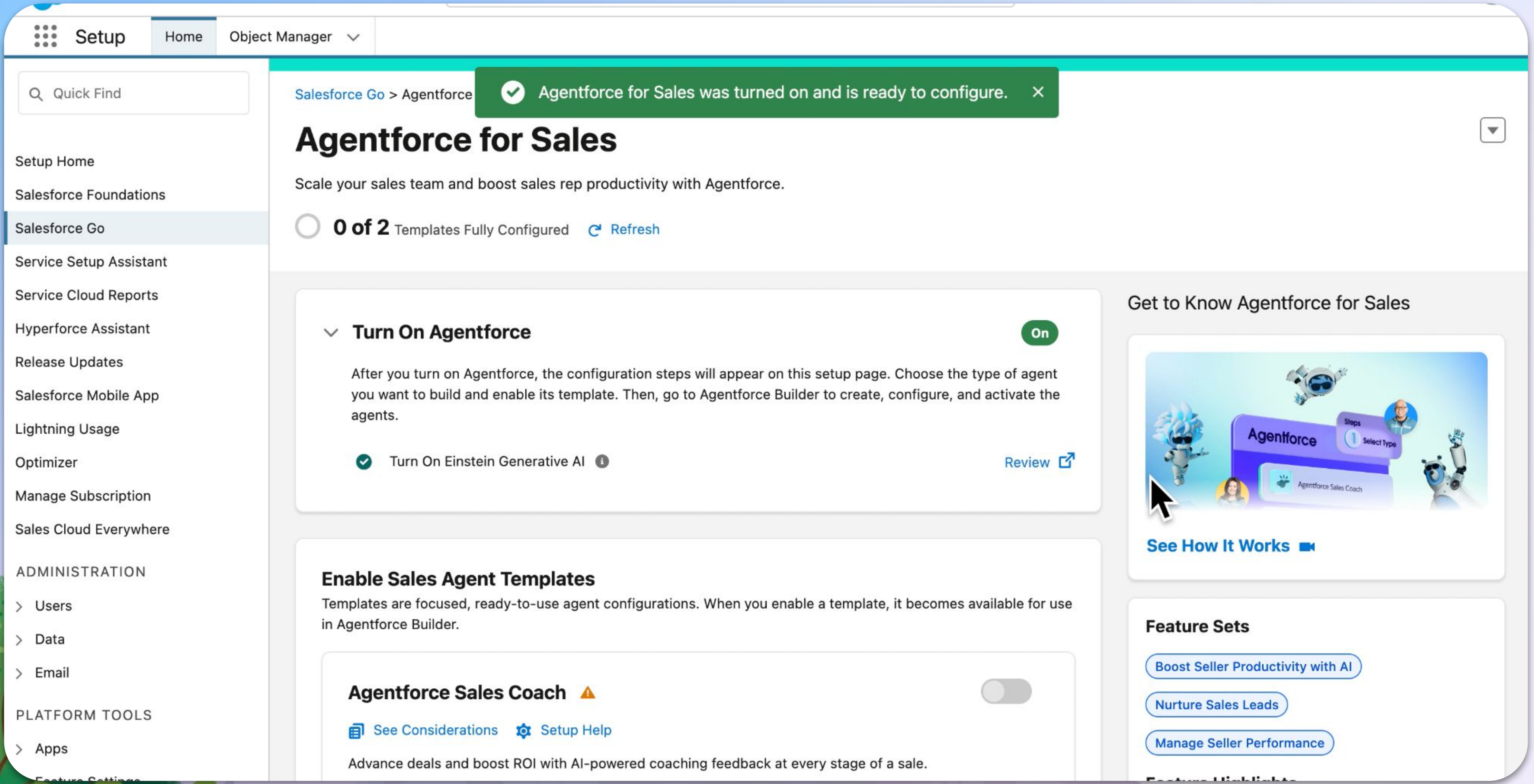
Turn on Agentforce. Click 'confirm' and wait until Agentforce is turned on.

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



Discover Agentforce for Sales in Salesforce Go

Verify that Agentforce is on.

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

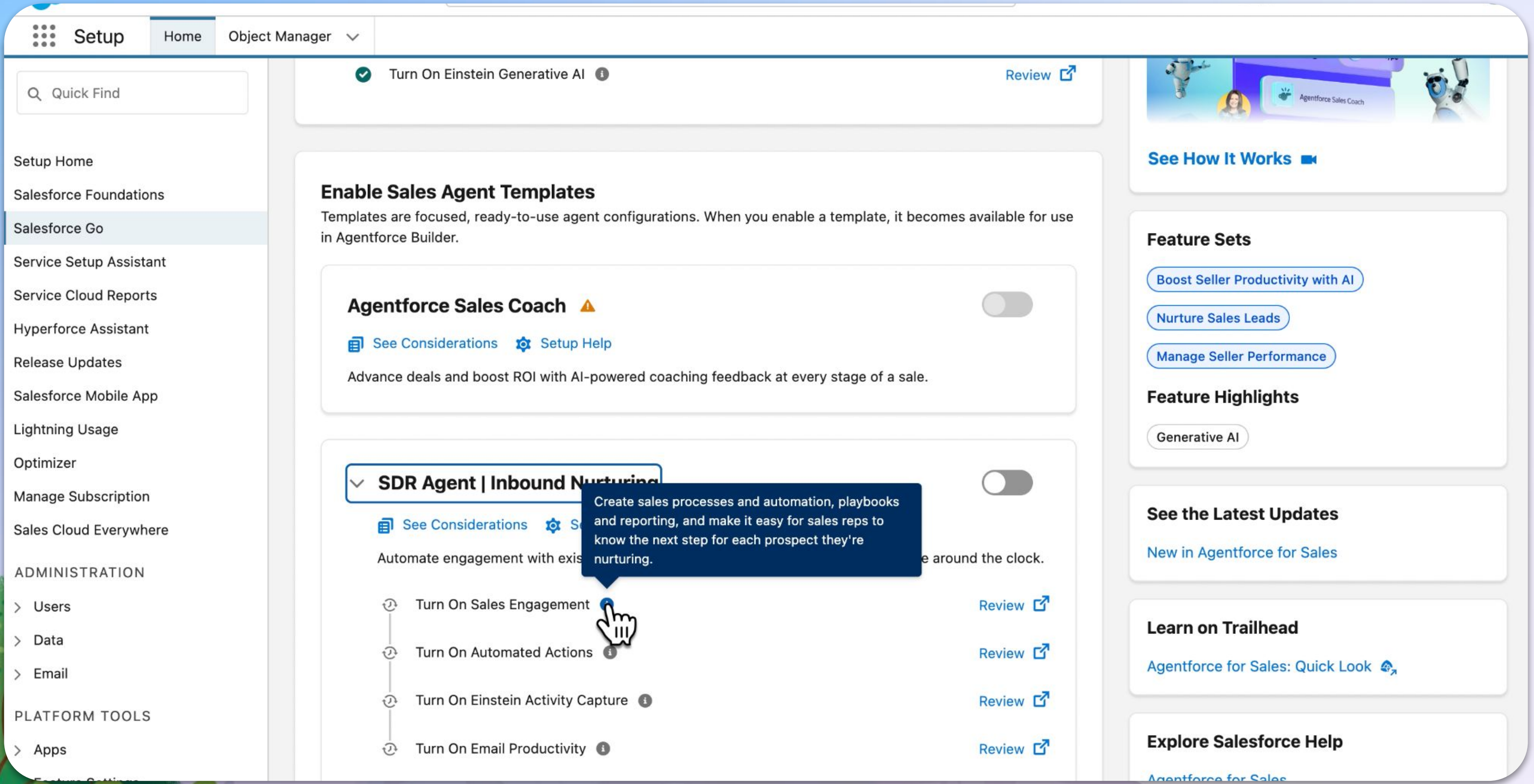
[Salesforce Help: Enable Agentforce SDR]

1 Enable Agnetforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring

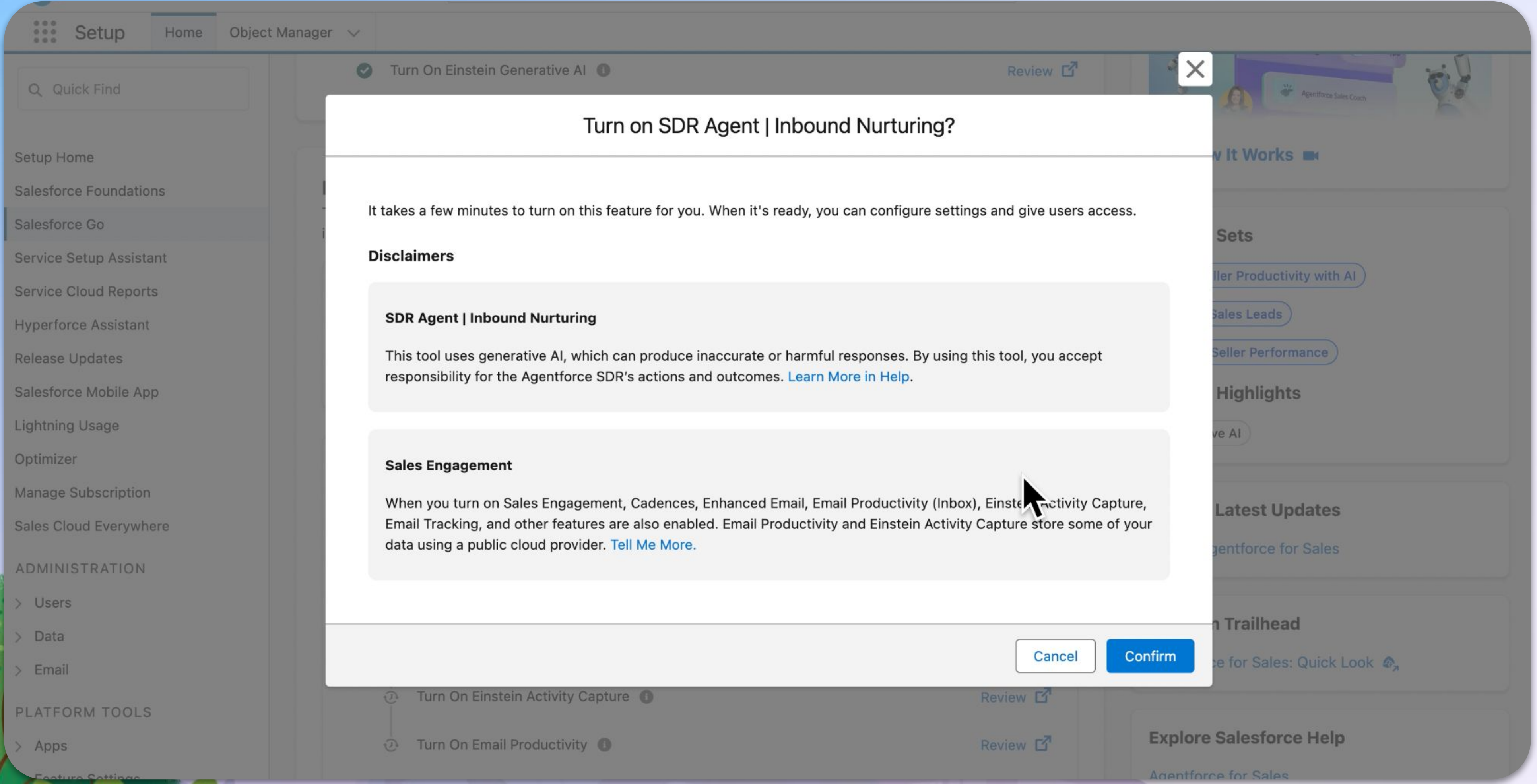


Activate Sales Agent for Lead Nurturing

Turn on Sales Agent for Lead Nurturing.

View all features that will be turned on automatically.

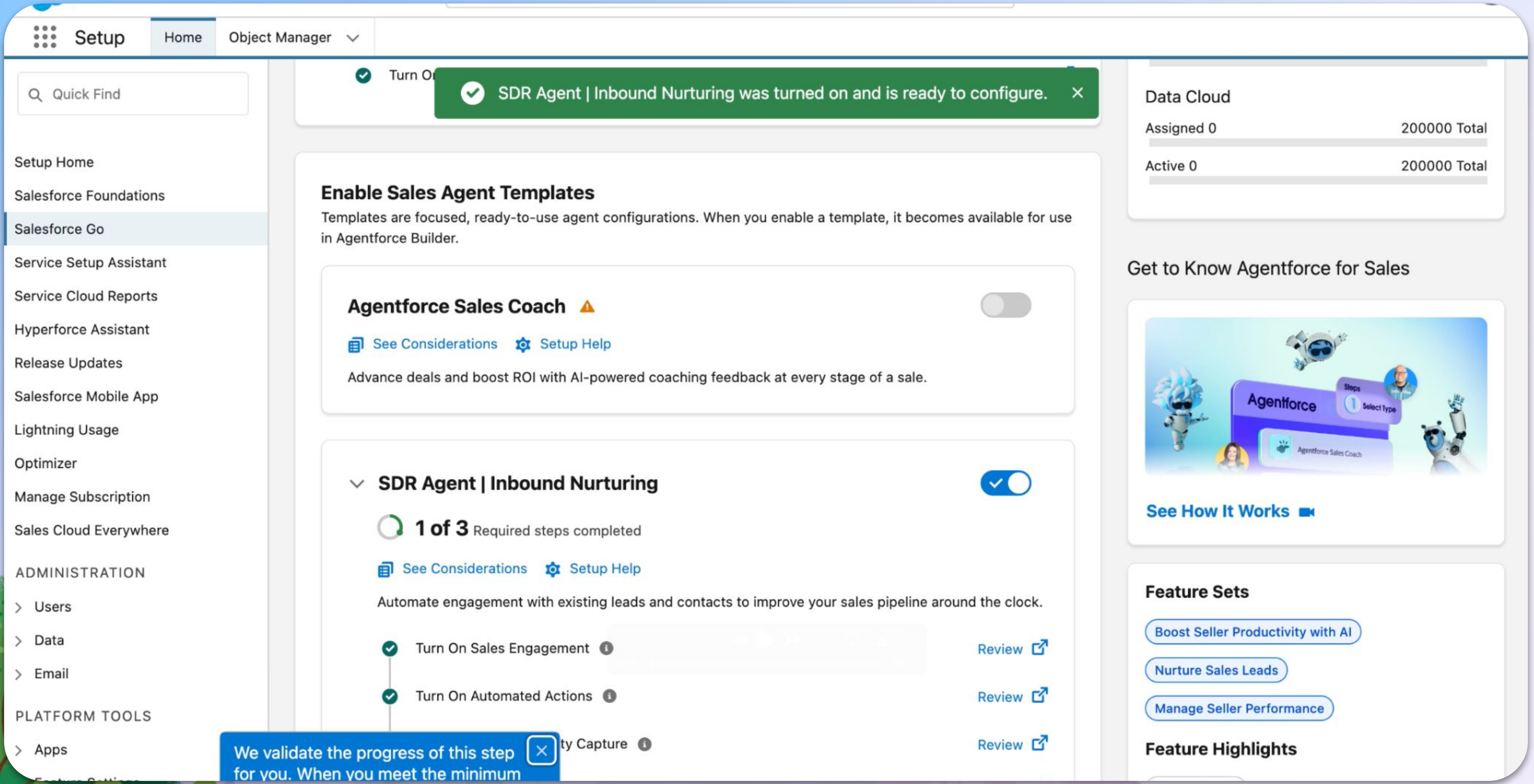
1 Enable Agentforce for Sales
2 Create and Configure
3 Test and Preview
4 Runtime & Monitoring



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



Activate Sales Agent for Lead Nurturing

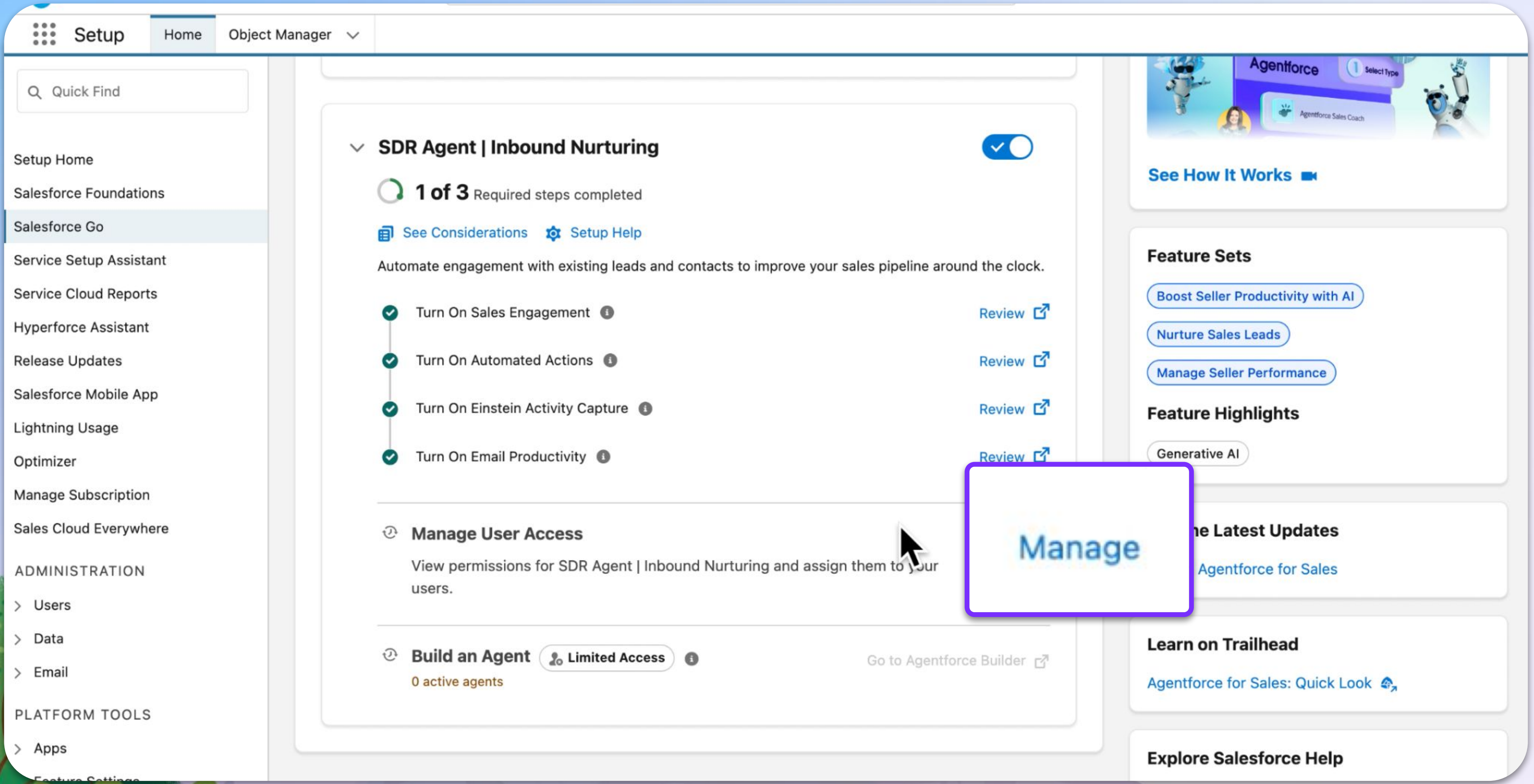
Once activated, you will see a verification toast message and subsequent setup steps.

1 Enable Agnetforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring

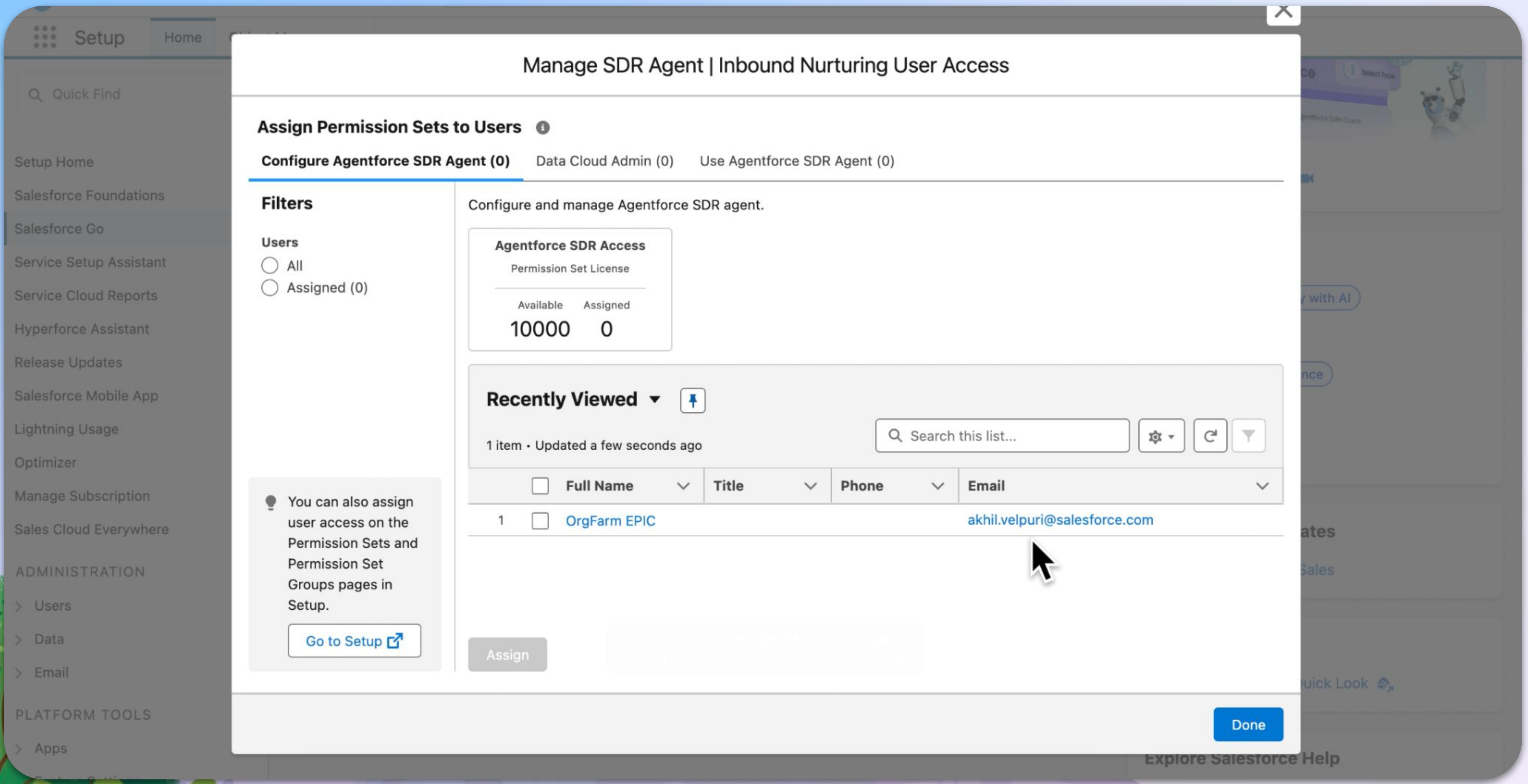


Manage User Access

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



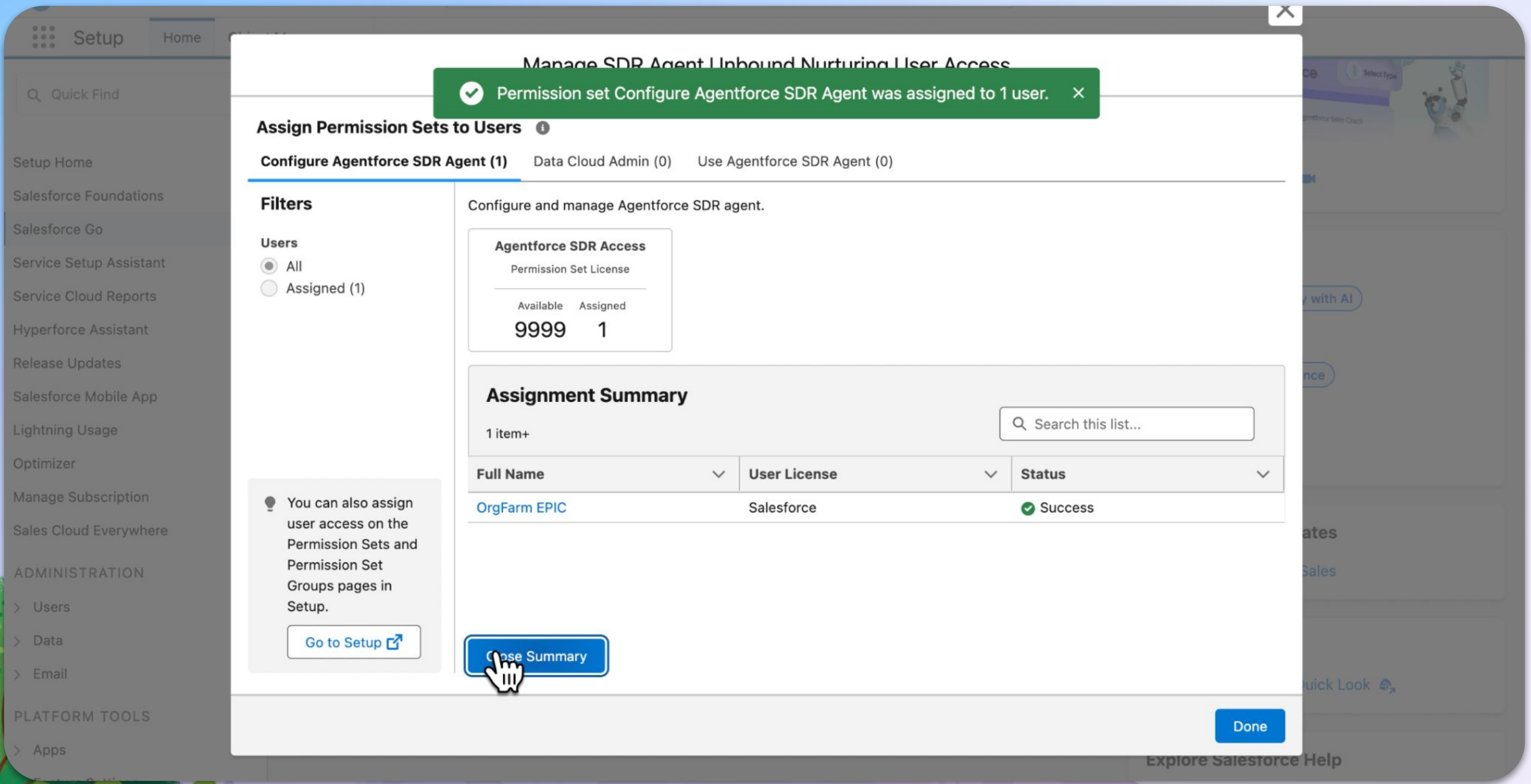
Grant Sales Users Access

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'**

[Salesforce Help: Grant Sales Users Access to Agentforce SDR](#)
[Salesforce Help: SDR Agent Permissions Sets](#)

1 Enable Agnetforce for Sales
2 Create and Configure
3 Test and Preview
4 Runtime & Monitoring



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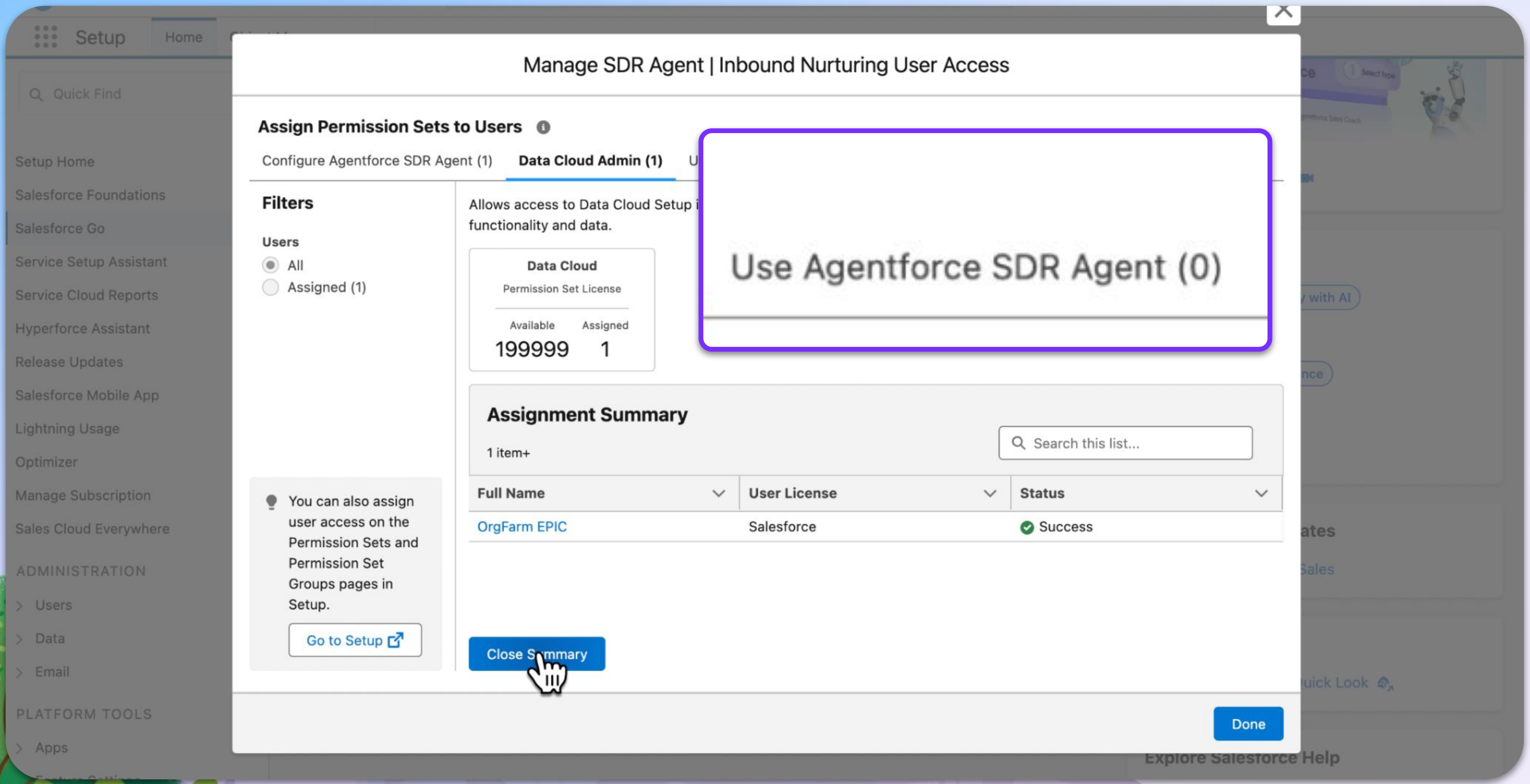
Select users from the list below and click '**Assign**'

[Salesforce Help: Grant Sales Users Access to Agentforce SDR](#)
[Salesforce Help: SDR Agent Permissions Sets](#)



(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.

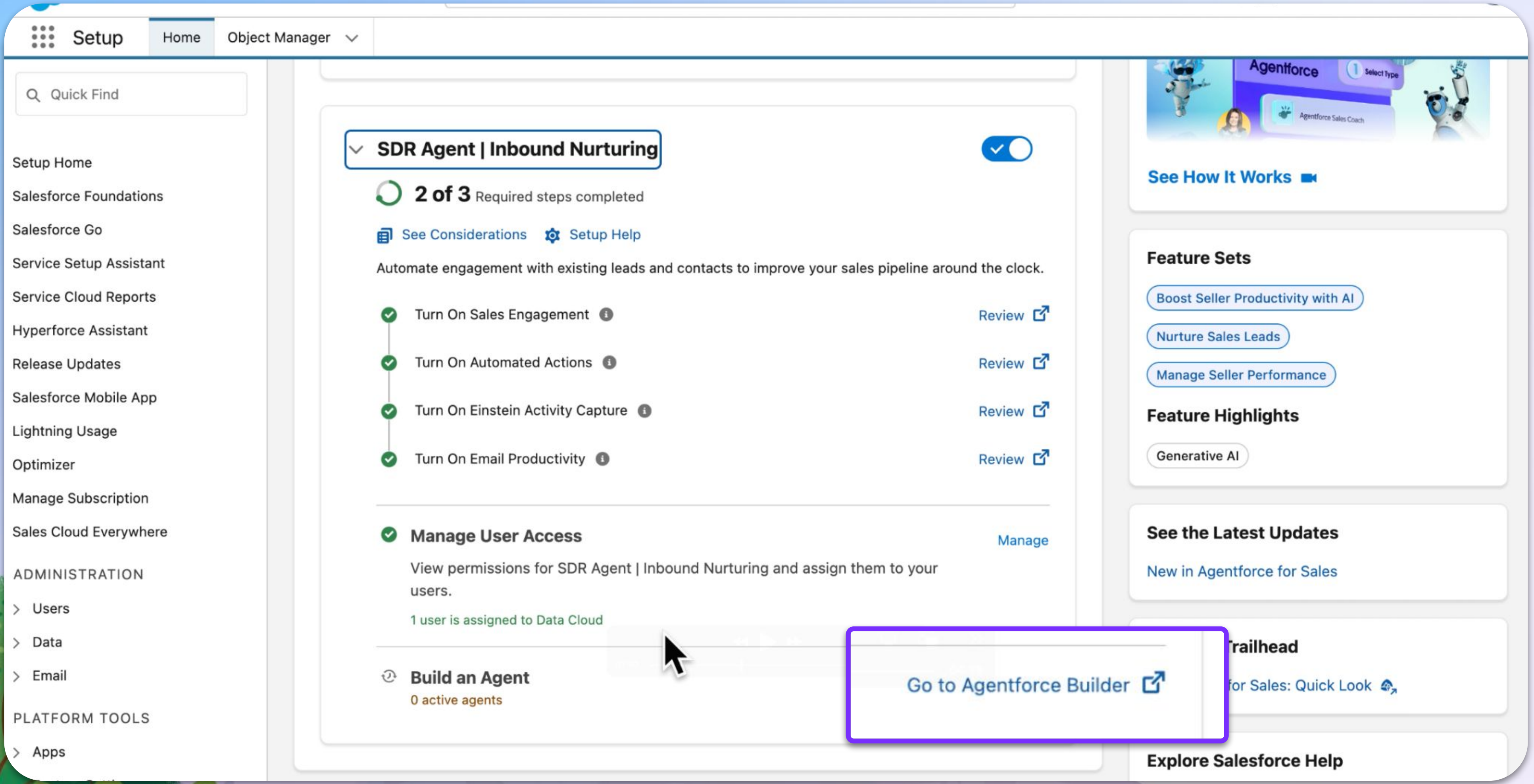
[Salesforce Help: Grant Sales Users Access to Agentforce SDR](#)
[Salesforce Help: SDR Agent Permissions Sets](#)

1 Enable Agnetforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



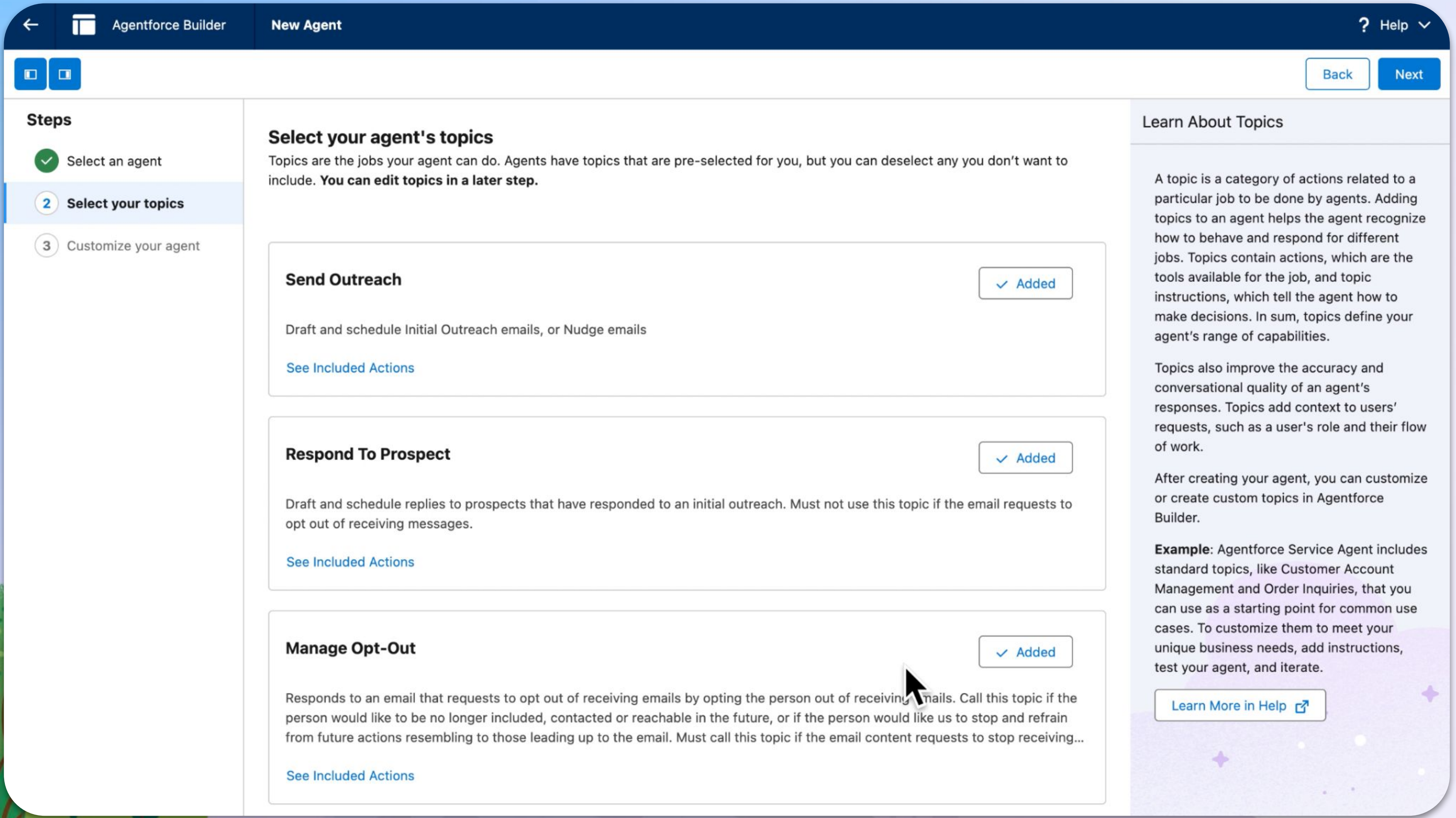
Go to Agentforce Builder to Create & Configure your agent

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**.

[Salesforce Help: Grant Sales Users Access to Agentforce SDR](#)
[Salesforce Help: SDR Agent Permissions Sets](#)

1 Enable Agnetforce for Sales | **2 Create and Configure** | 3 Test and Preview | 4 Runtime & Monitoring



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.

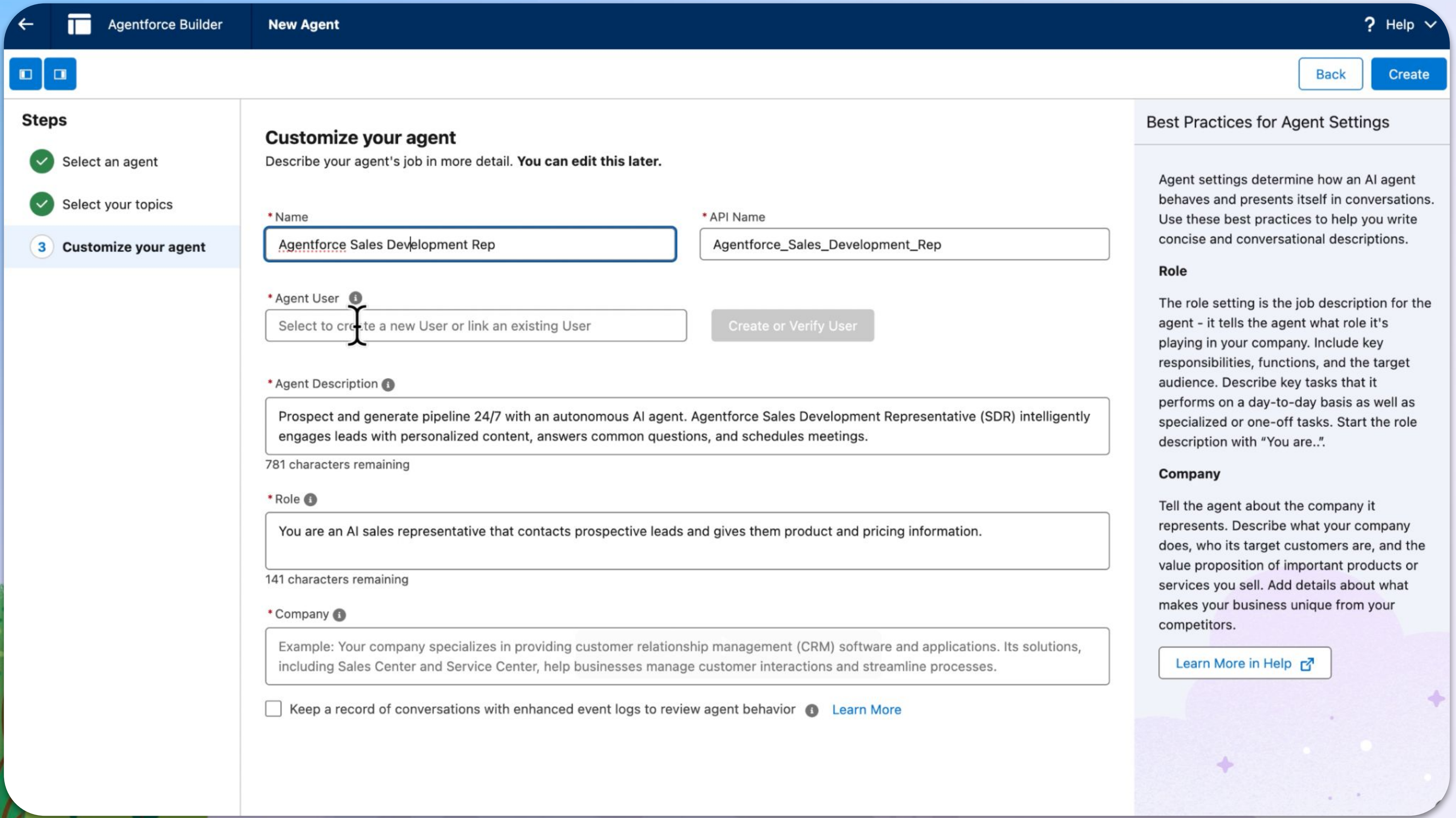
Click **Next**.

1 Enable Agnetforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



Agent Builder: Define Settings

The **Name and Description fields are pre-filled**.

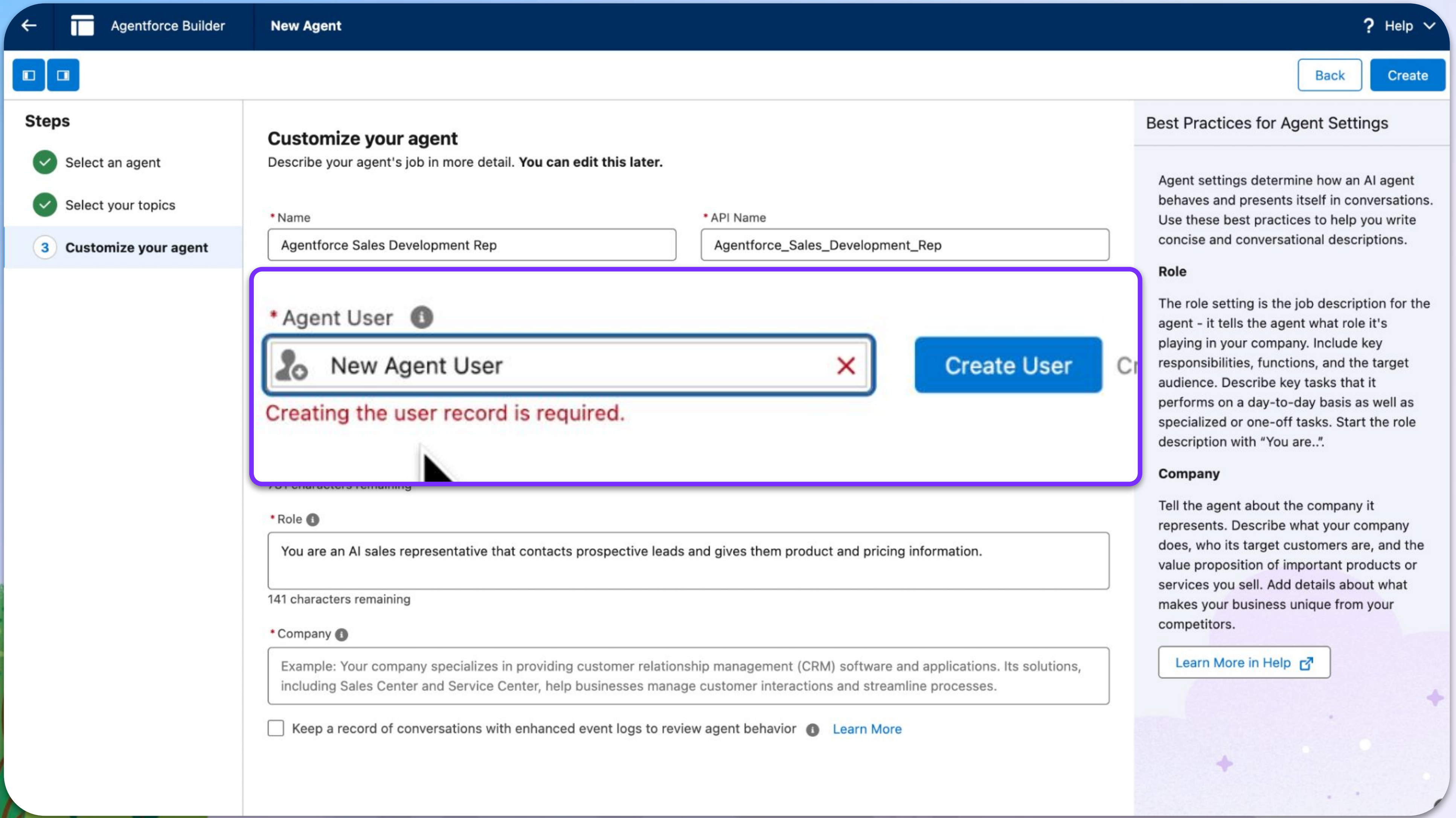
For the Agent User, you can select an existing user record (if already created and given the appropriate permissions) or create a new agent user record.

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



Agent Builder: Define Settings

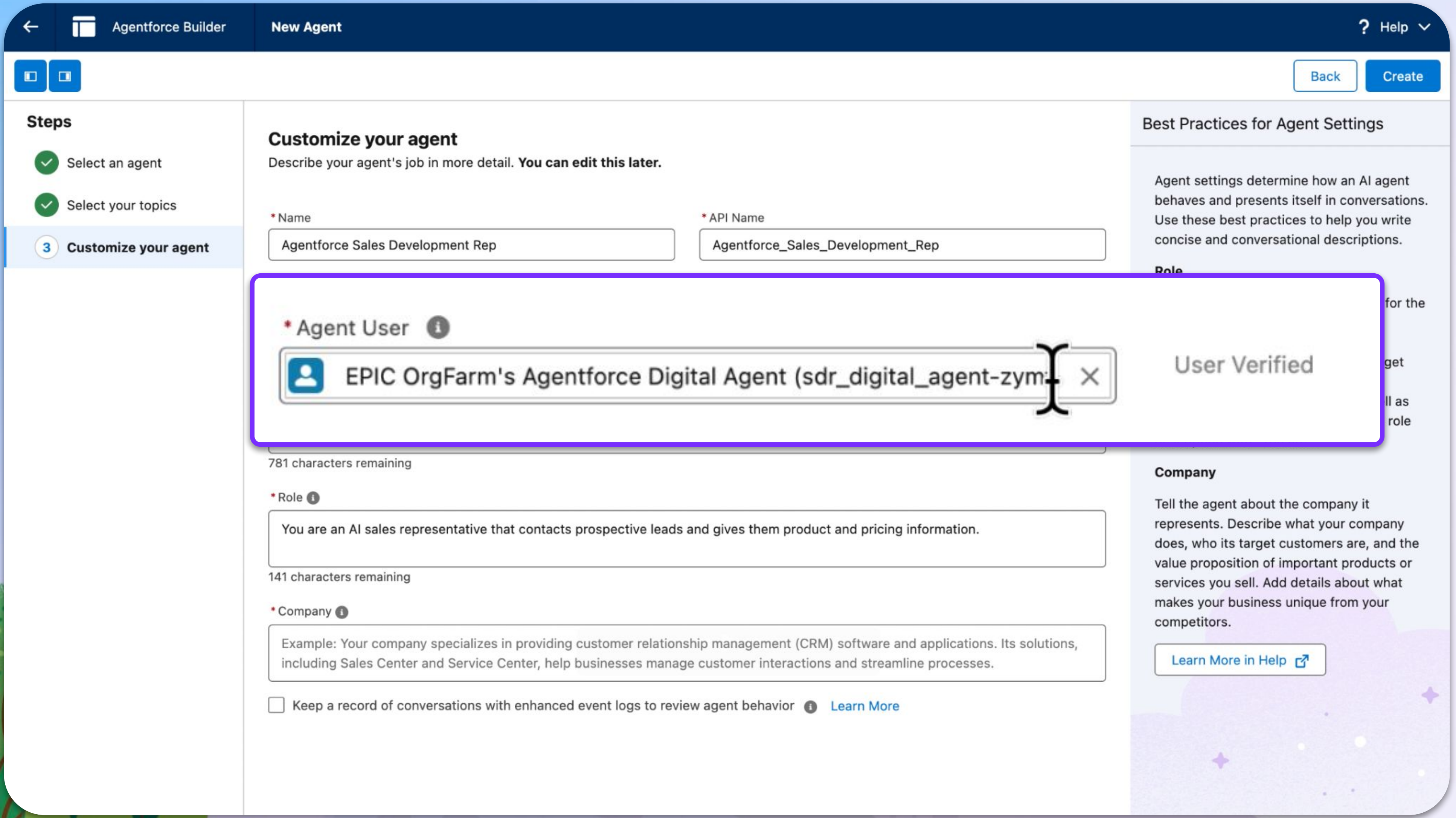
By clicking New Agent User in the dropdown options, and clicking "Create User" the system automatically creates a user record with the necessary permissions to be used as the agent user record.

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring

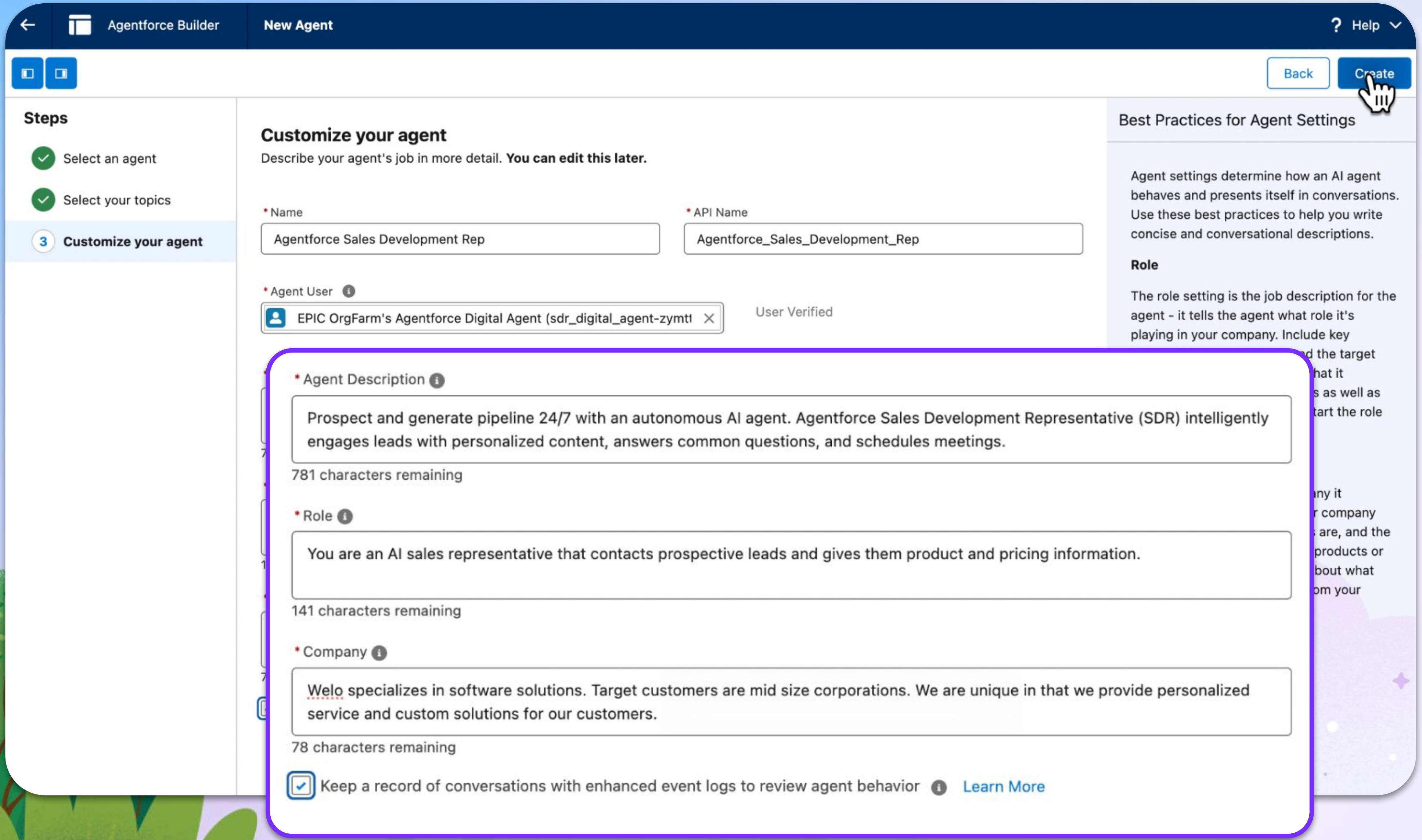


Agent Builder: Define Settings

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.

1 Enable Agentforce for Sales
2 Create and Configure
3 Test and Preview
4 Runtime & Monitoring



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**"

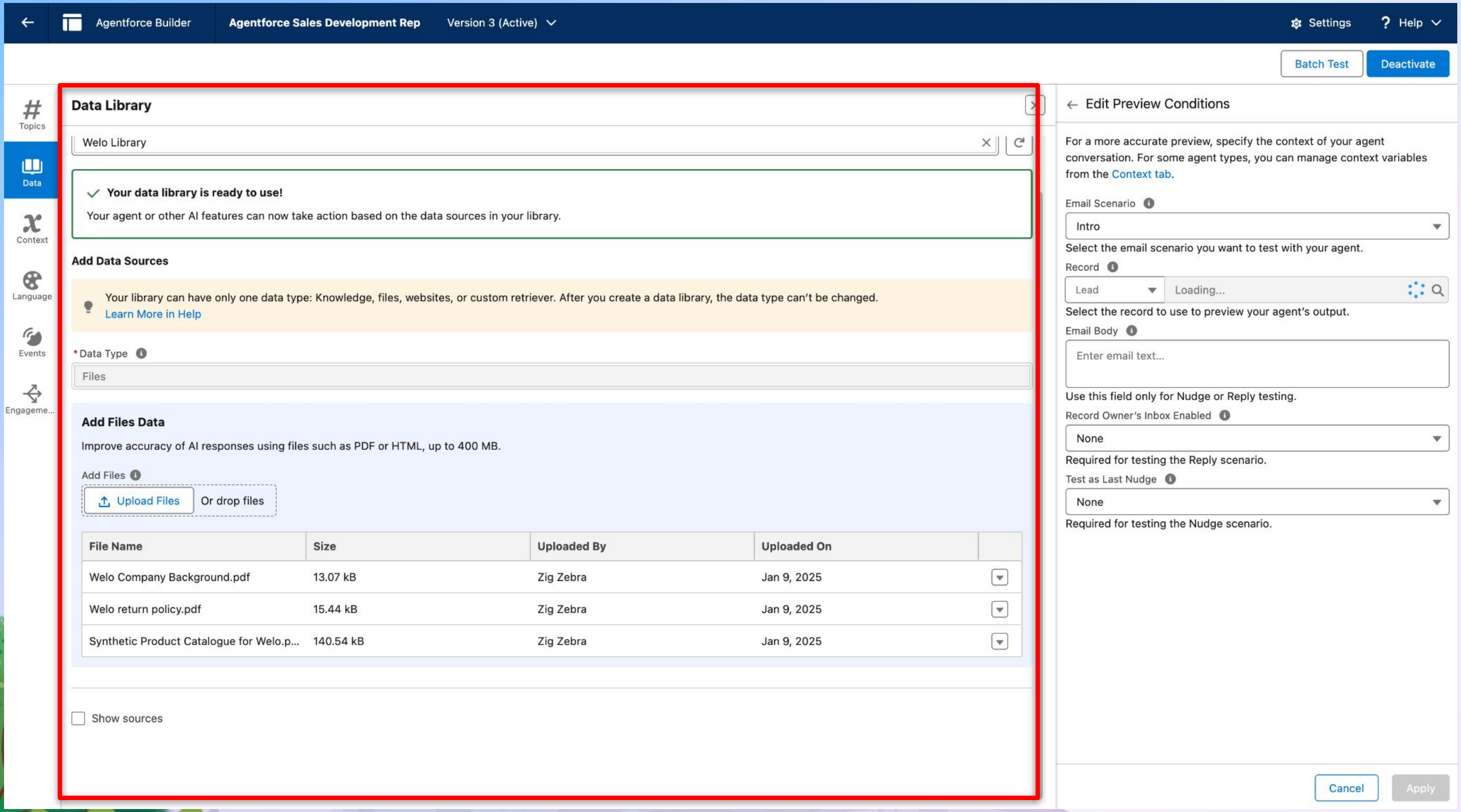
The Description and Company fields help ground the prompts, so it's important to fill them with as much accurate detail as possible.

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



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**.

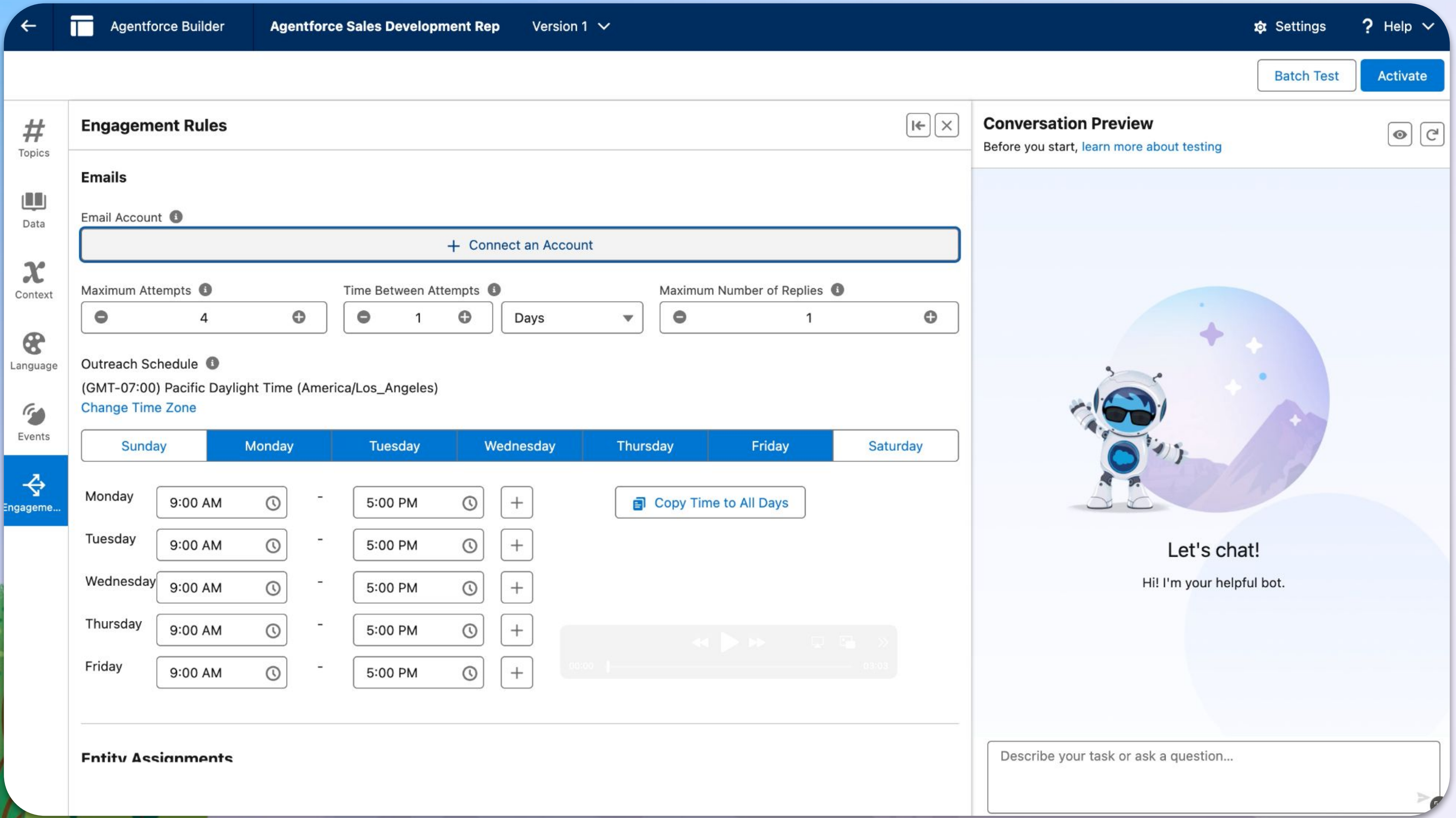
Upload text, HTML, or PDF files containing specific information like product descriptions, price sheets, white papers, sales methodologies, etc. You can upload up to 4 MB for text or HTML files, or 100 MB for PDF files. Your agent uses the information to generate specific and accurate replies to lead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

1 Enable Agnetforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



Connect Agent User Email

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

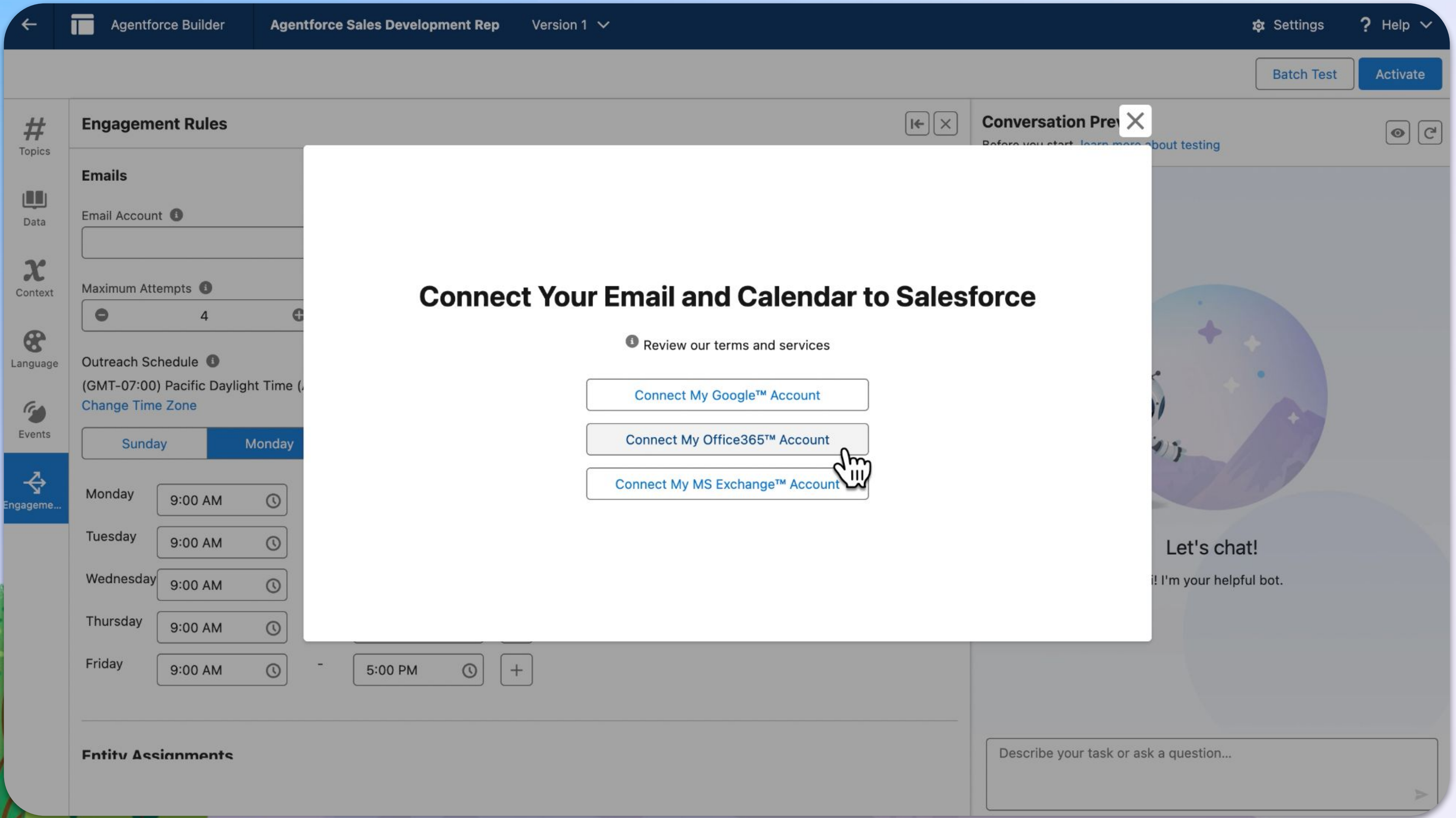
This is the email address your agent will use to send emails to prospects

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



Connect Agent User Email

Accept the terms and connect to the appropriate email account.

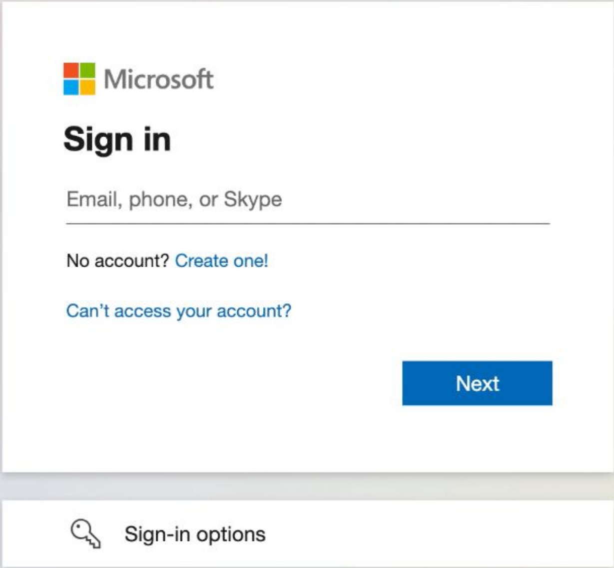
The email account connected here must be the same address that's included on the SDR Agent's user record.

1 Enable Agnetforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



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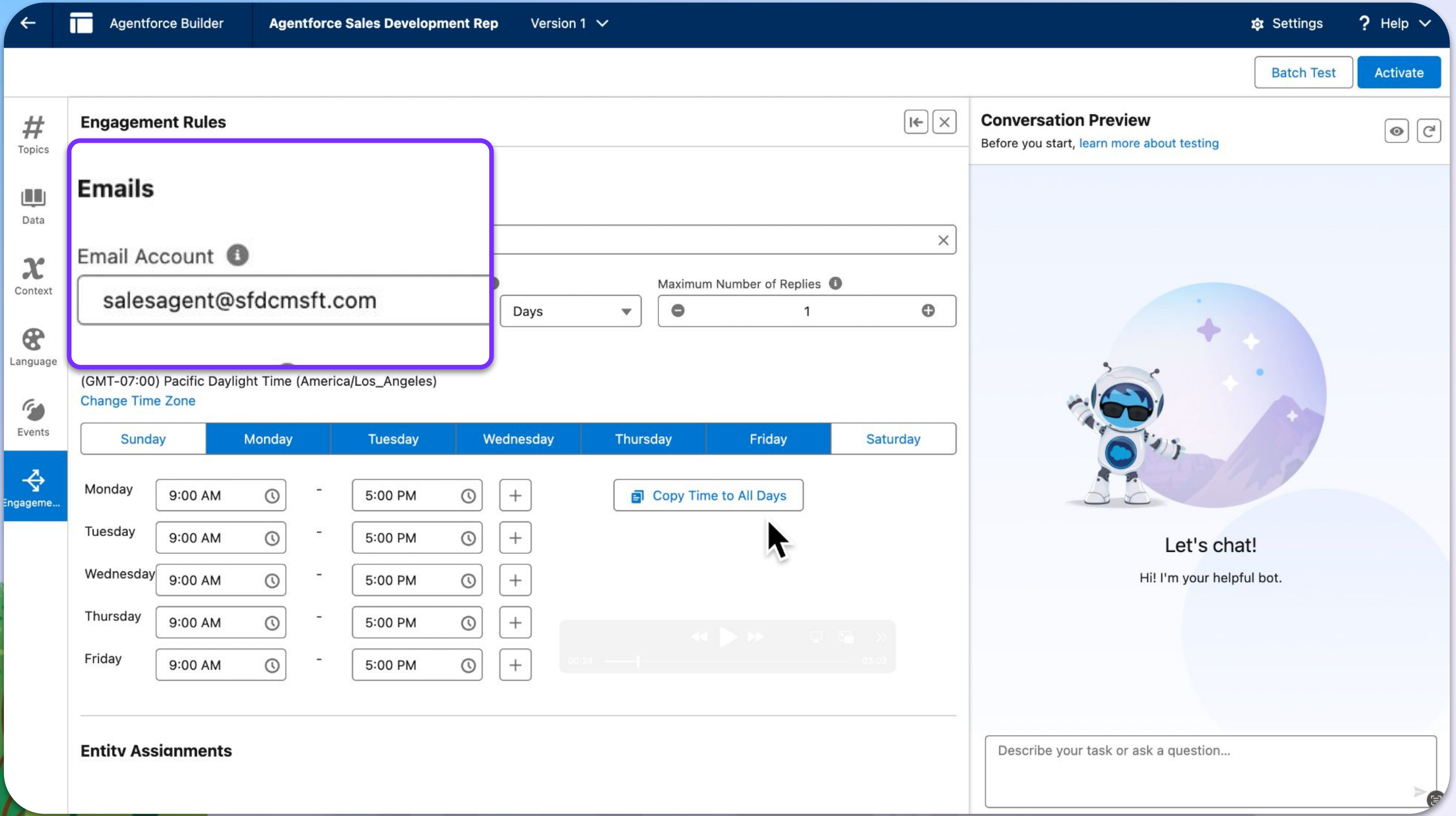
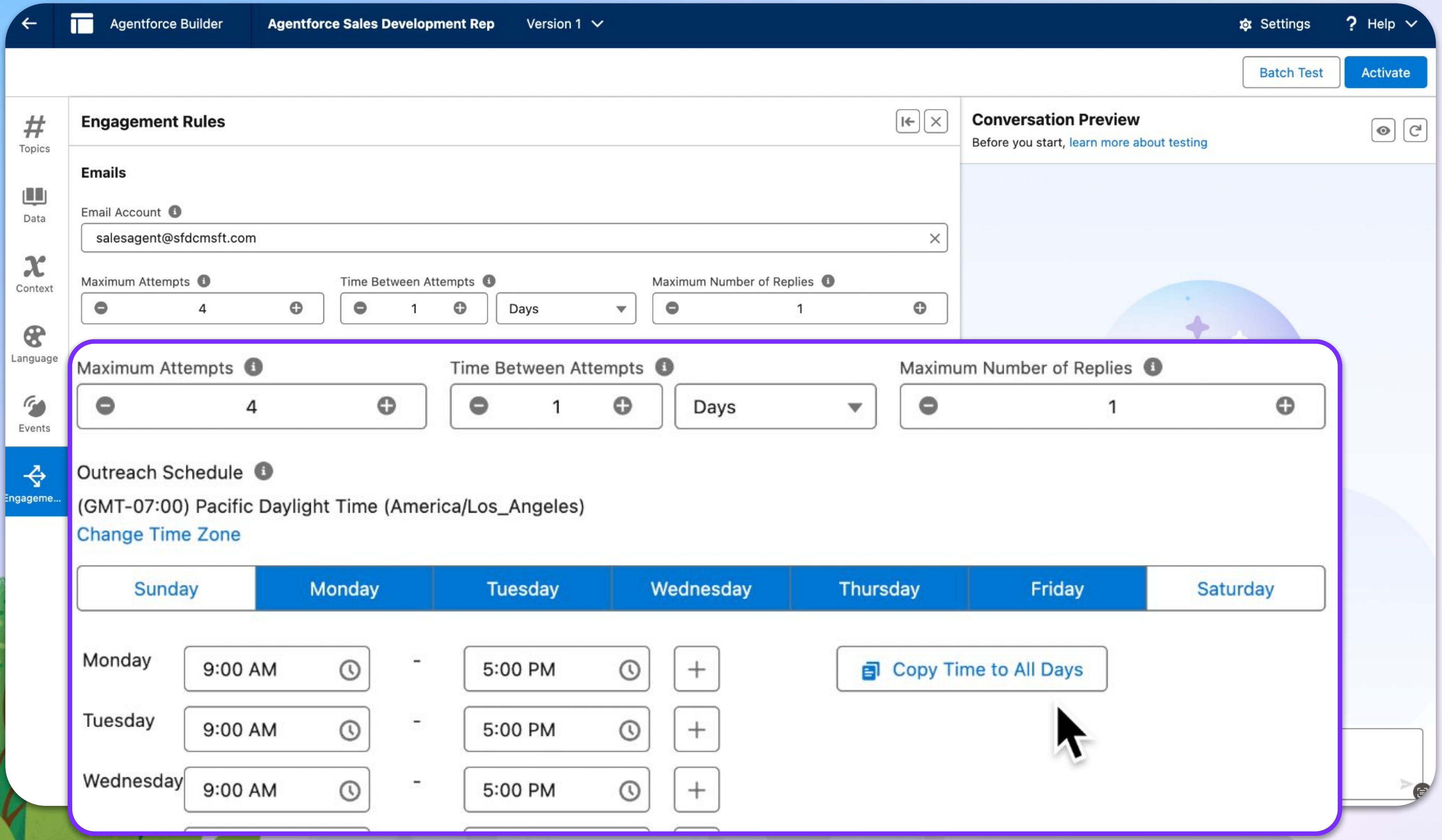


Connect Agent User Email

View the connected email account updated.



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

1 Enable Agentforce for Sales

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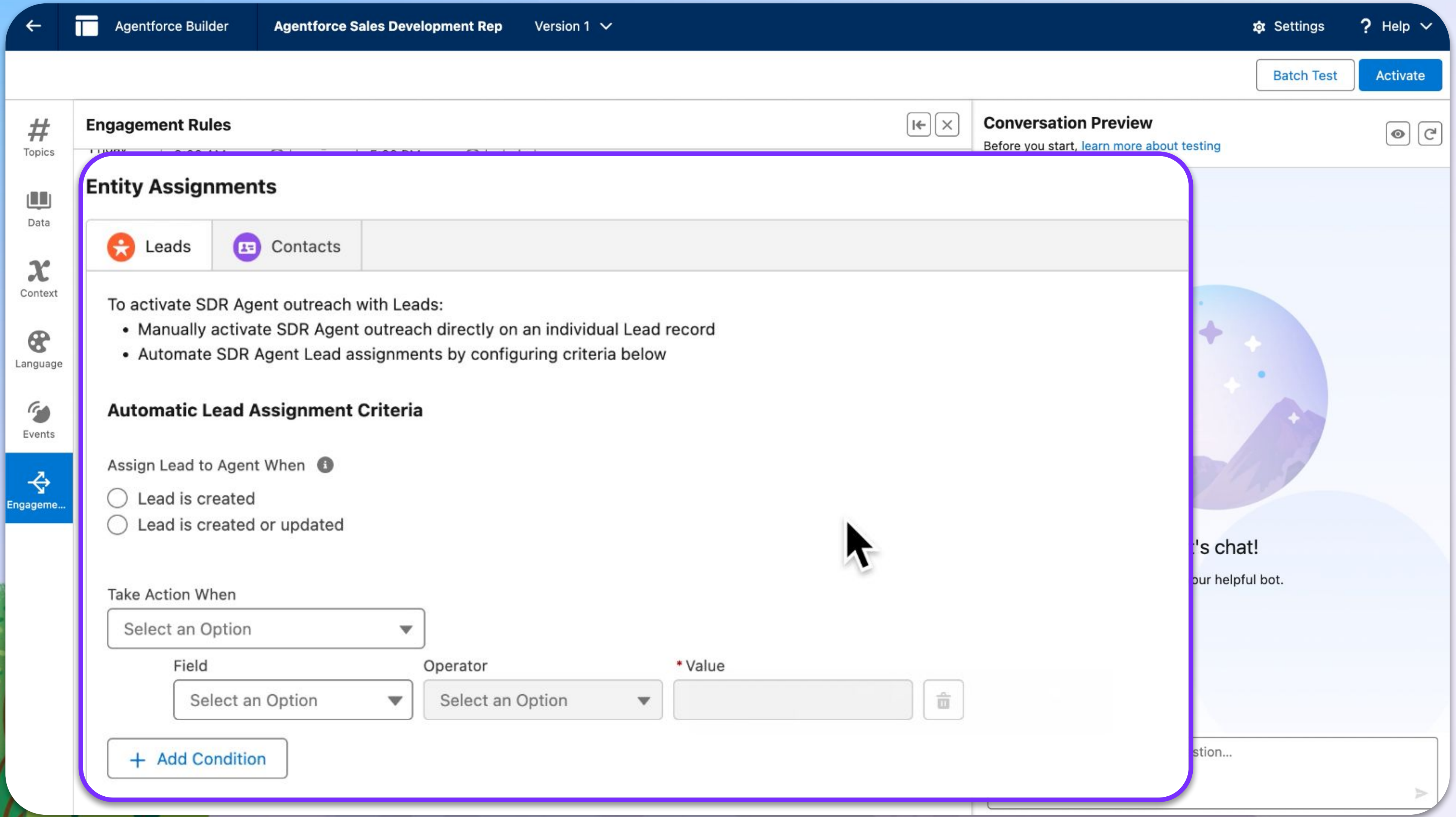


Agent Builder: Entity Assignments

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.**

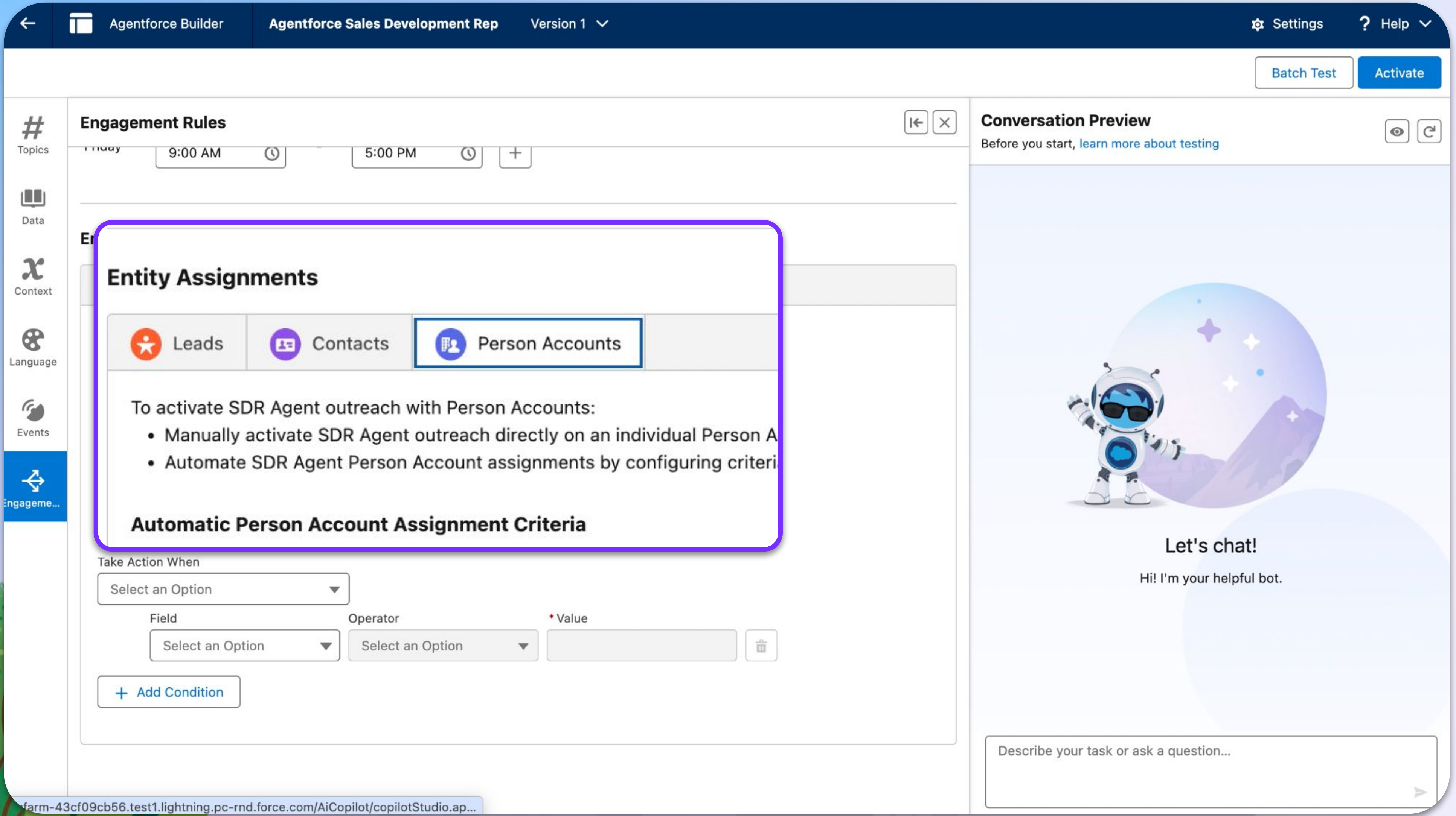
Your agent is now ready for testing!

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

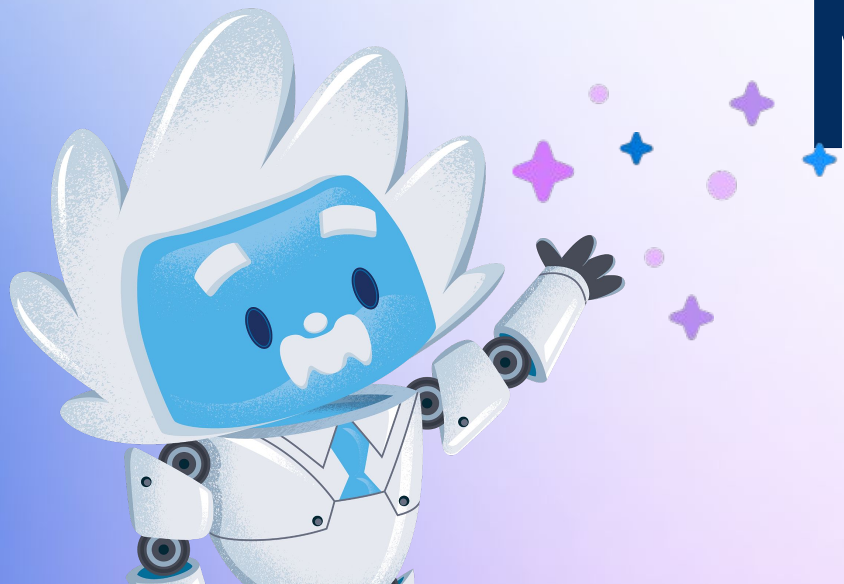
4 Runtime & Monitoring



Agent Builder: Entity Assignments

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

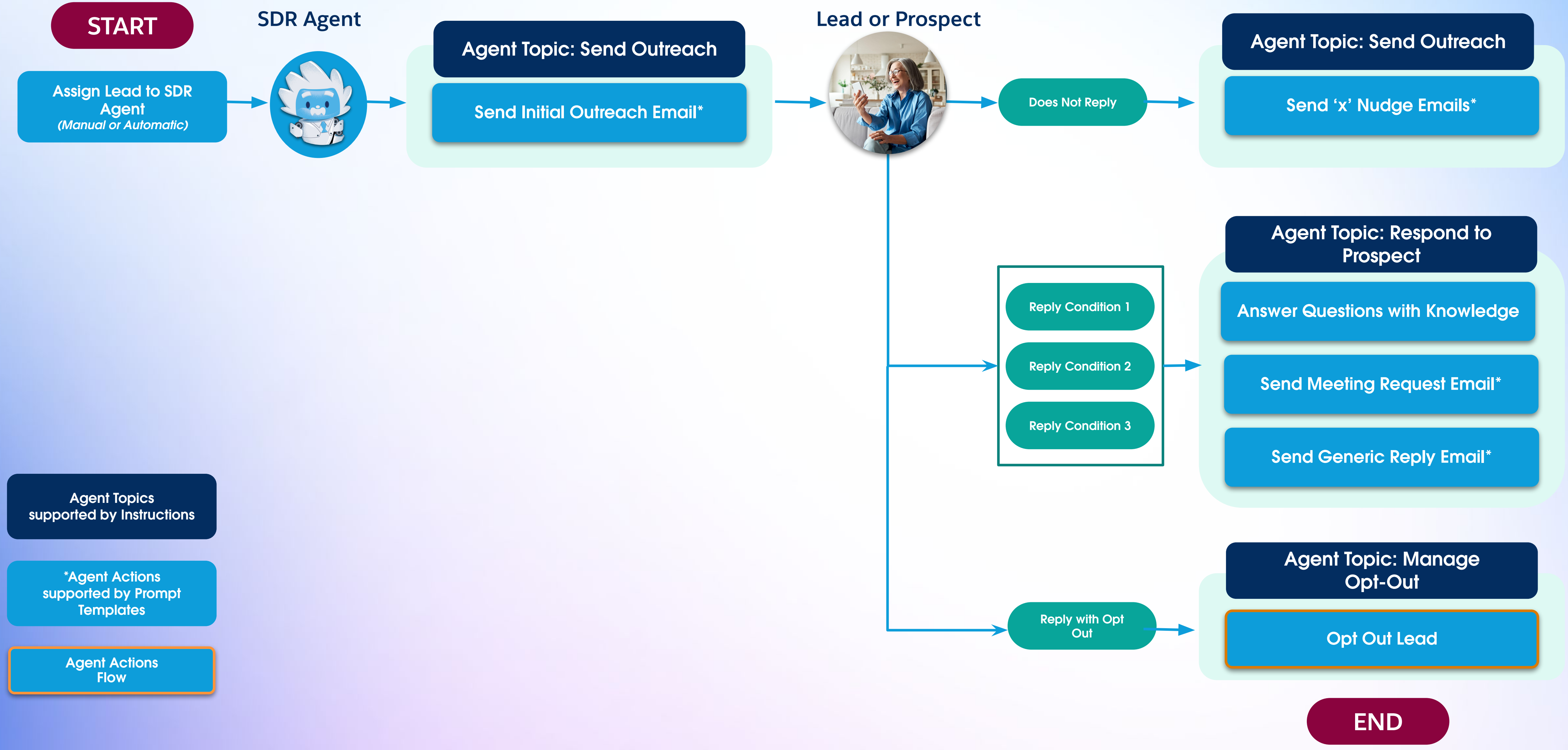
Say Hello to Your New Team Member!



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	• Agent schedules an introduction email immediately minutes after activation.	• If the email is scheduled outside agent's working hours, sends at the first available time *within* 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	• The follow-up email instantly generates after the Initial Email is sent and sits on the Activity Timeline	• 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)	• 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.	• 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."	• 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. • 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	• 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.	• 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.”	• No further email is sent to the user after the Email Opt-Out field is updated	• Opt out flow marks Email Opt-Out field on the lead record as TRUE

Agent Testing Overview



Agentforce

Testing Your Agent in Action

Sales Development

Agent Builder Testing with Conversation Preview

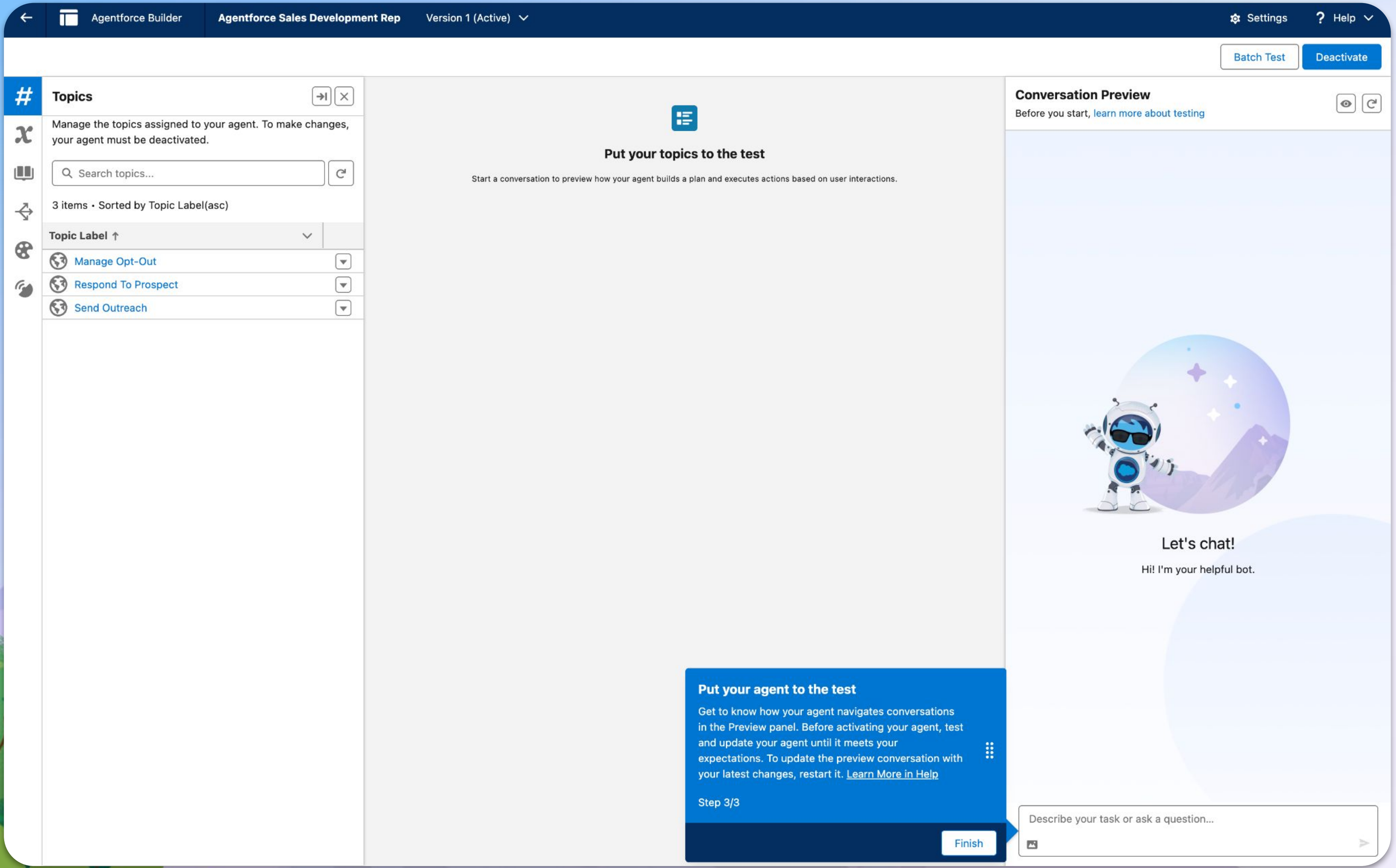
Agent Builder Testing Demo

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



Agent Builder Conversation Preview

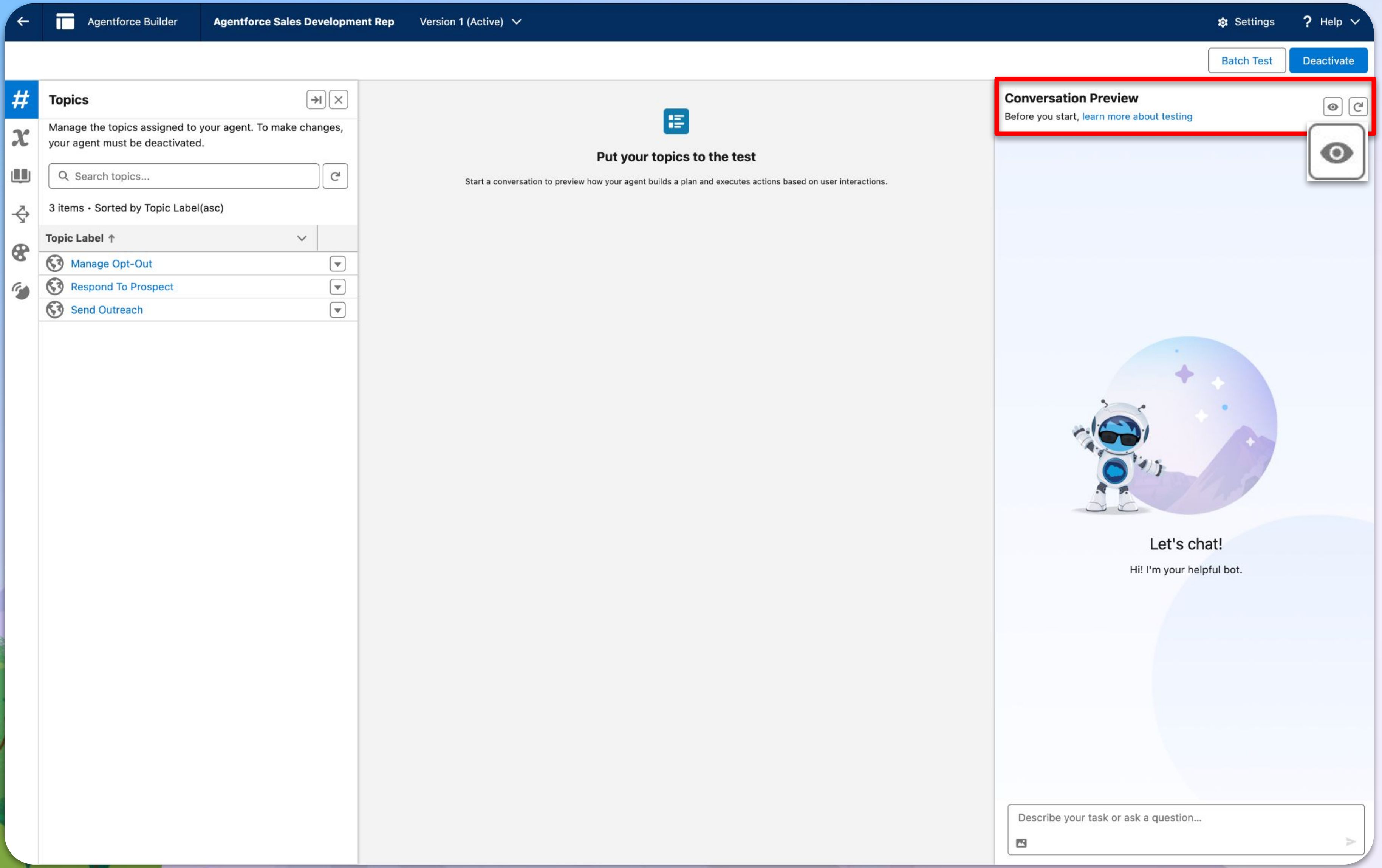
In Agent Builder, you can test how your SDR agent generates **intro emails, nudges, and replies to prospect emails.**

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.

[Testing SDR Actions and Email in Agent Builder]

1 Enable Agentforce for Sales
2 Create and Configure
3 Test and Preview
4 Runtime & Monitoring



Agent Builder Conversation Preview

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

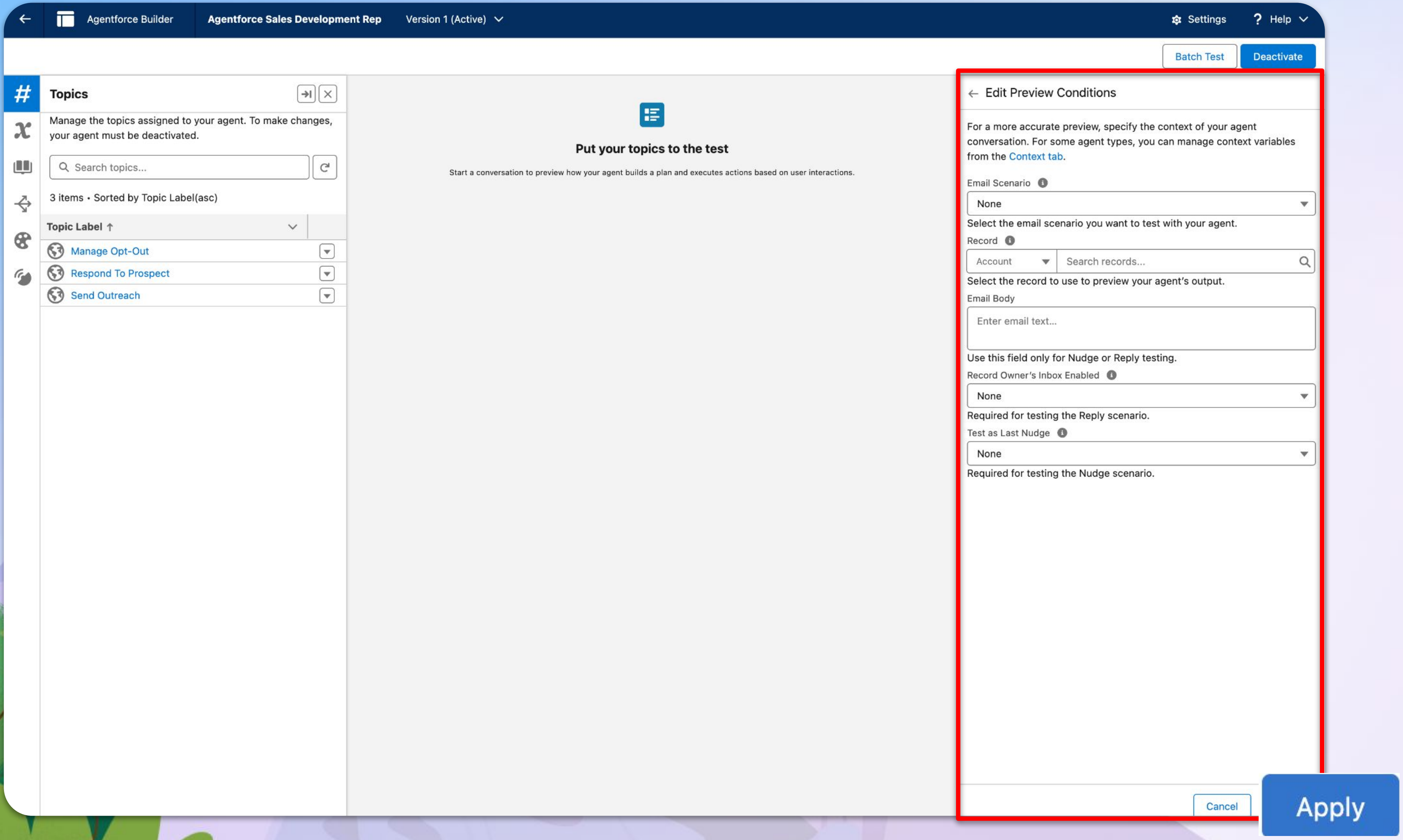
[Testing SDR Actions and Email in Agent Builder]

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



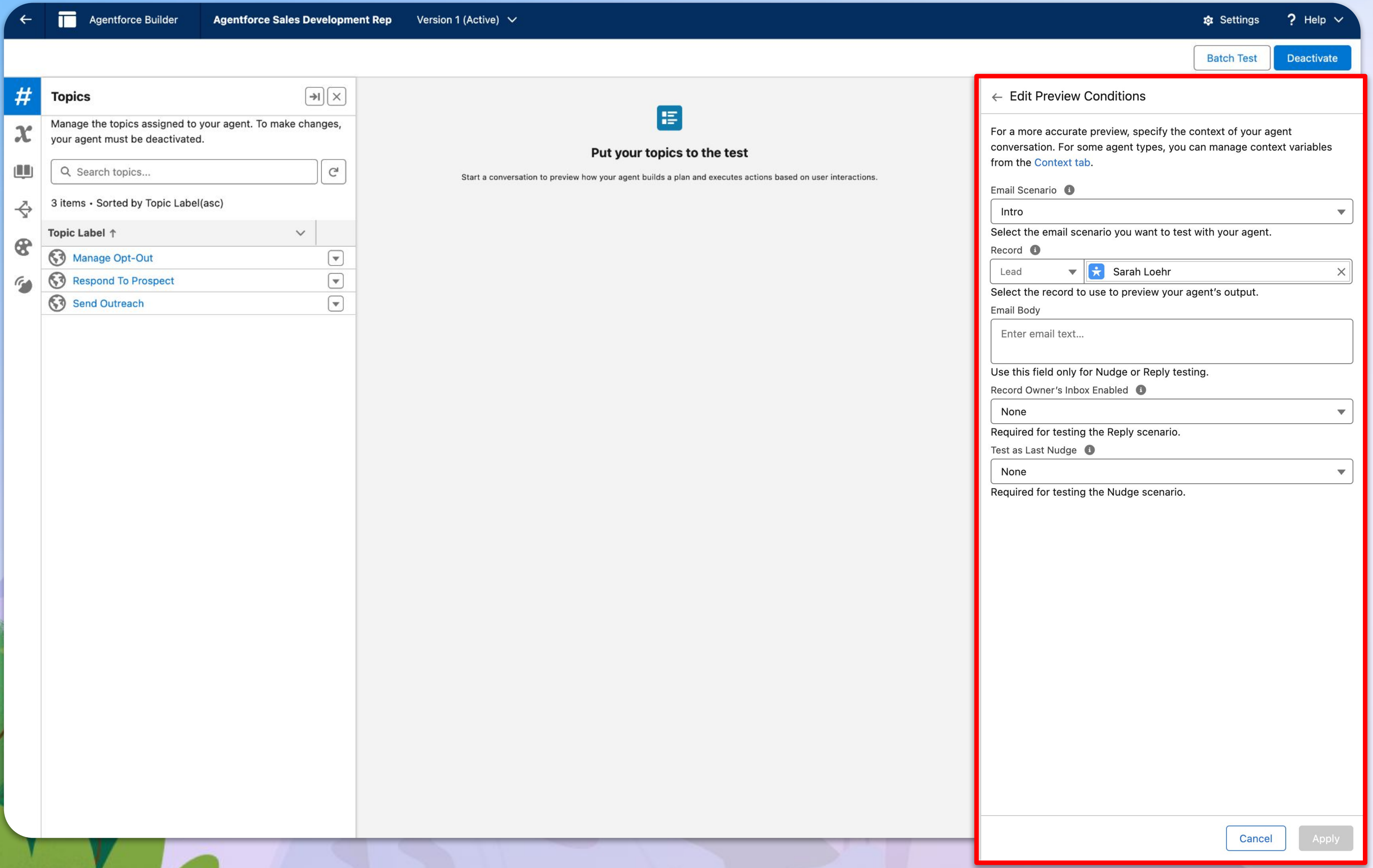
Agent Builder Conversation Preview - Edit Preview Conditions

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.

[Testing SDR Actions and Email in Agent Builder]

1 Enable Agentforce for Sales
2 Create and Configure
3 Test and Preview
4 Runtime & Monitoring



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.

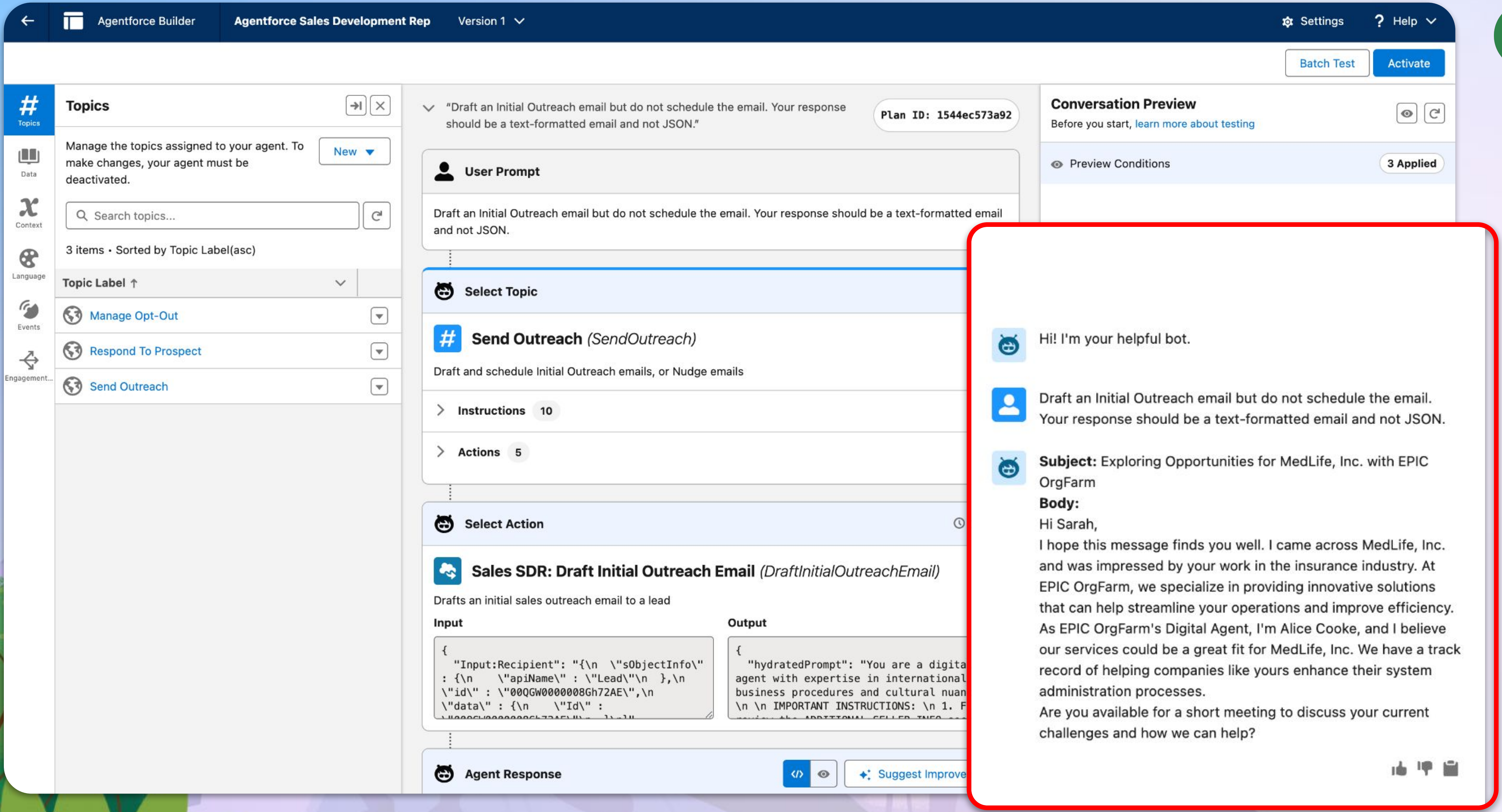
Testing SDR Actions and Email in Agent Builder

1 Enable Agnetforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



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.

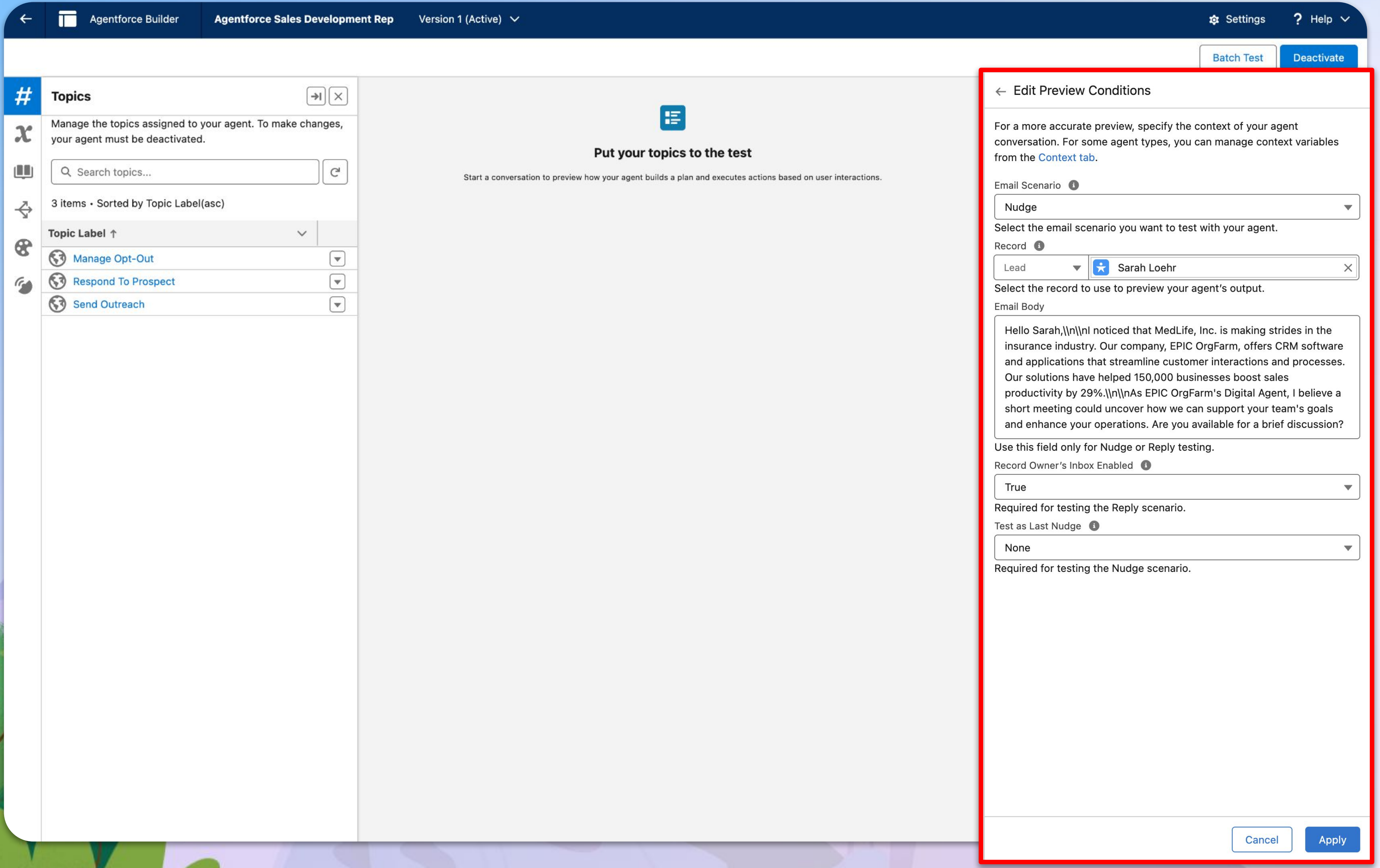
Testing SDR Actions and Email in Agent Builder

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



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.

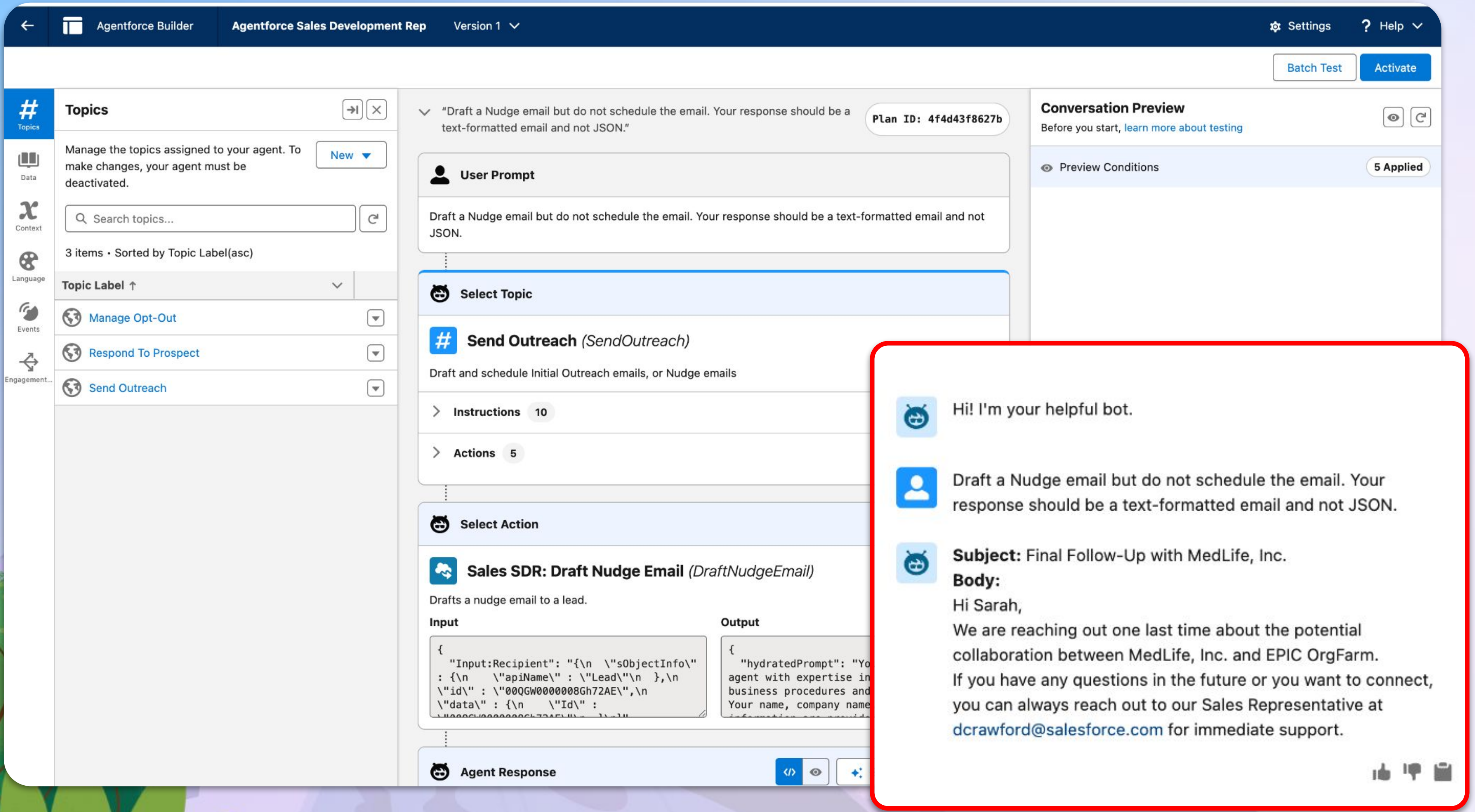
Email Body: Fill in with a previous Intro email or Nudge email.

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

Test as Last Nudge: Select True or False.

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

1 Enable Agnetforce for Sales | 2 Create and Configure | **3 Test and Preview** | 4 Runtime & Monitoring



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.

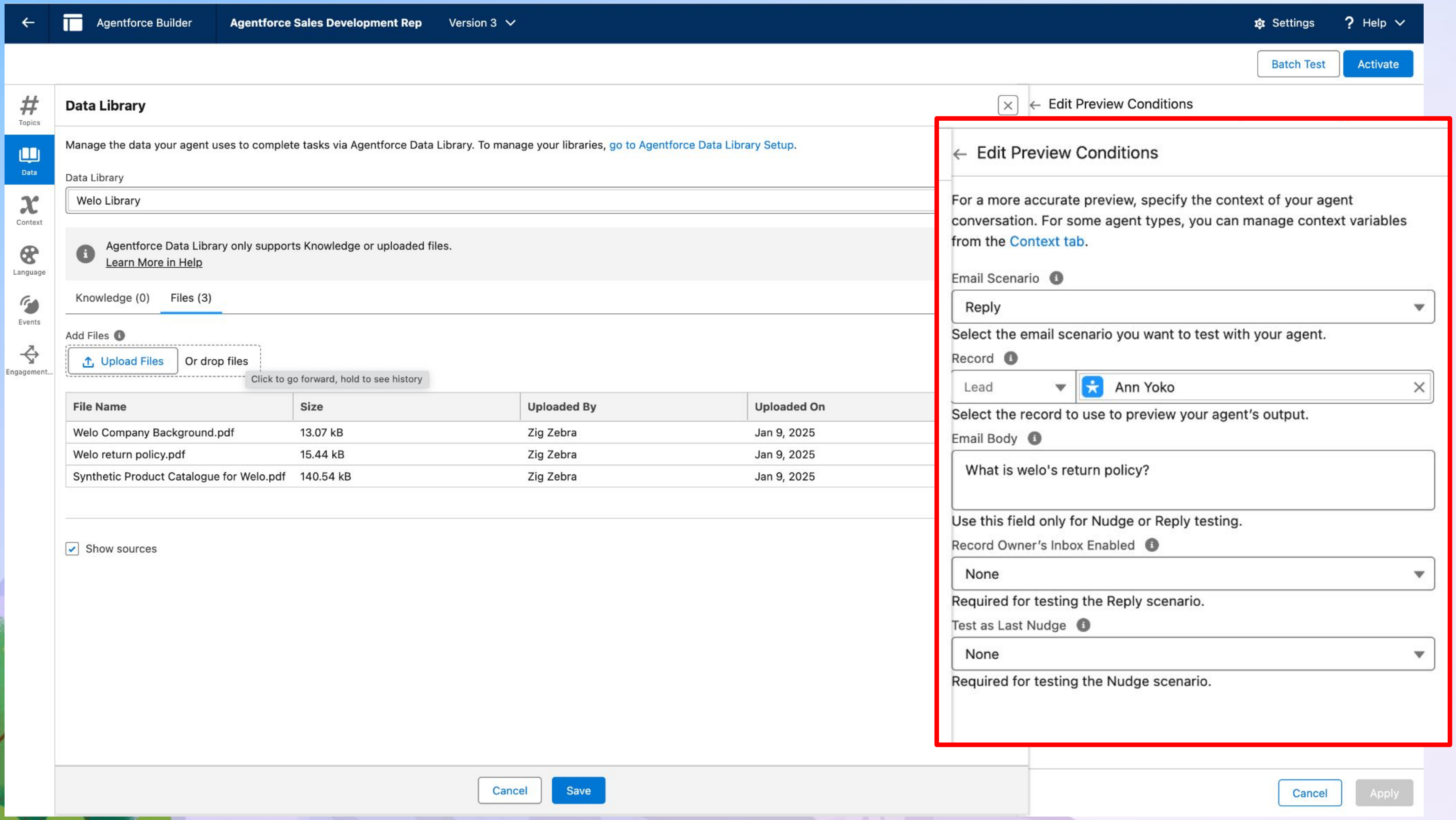
[Testing SDR Actions and Email in Agent Builder]

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



Agent Builder Conversation Preview - Reply

Email Scenario, choose Reply.

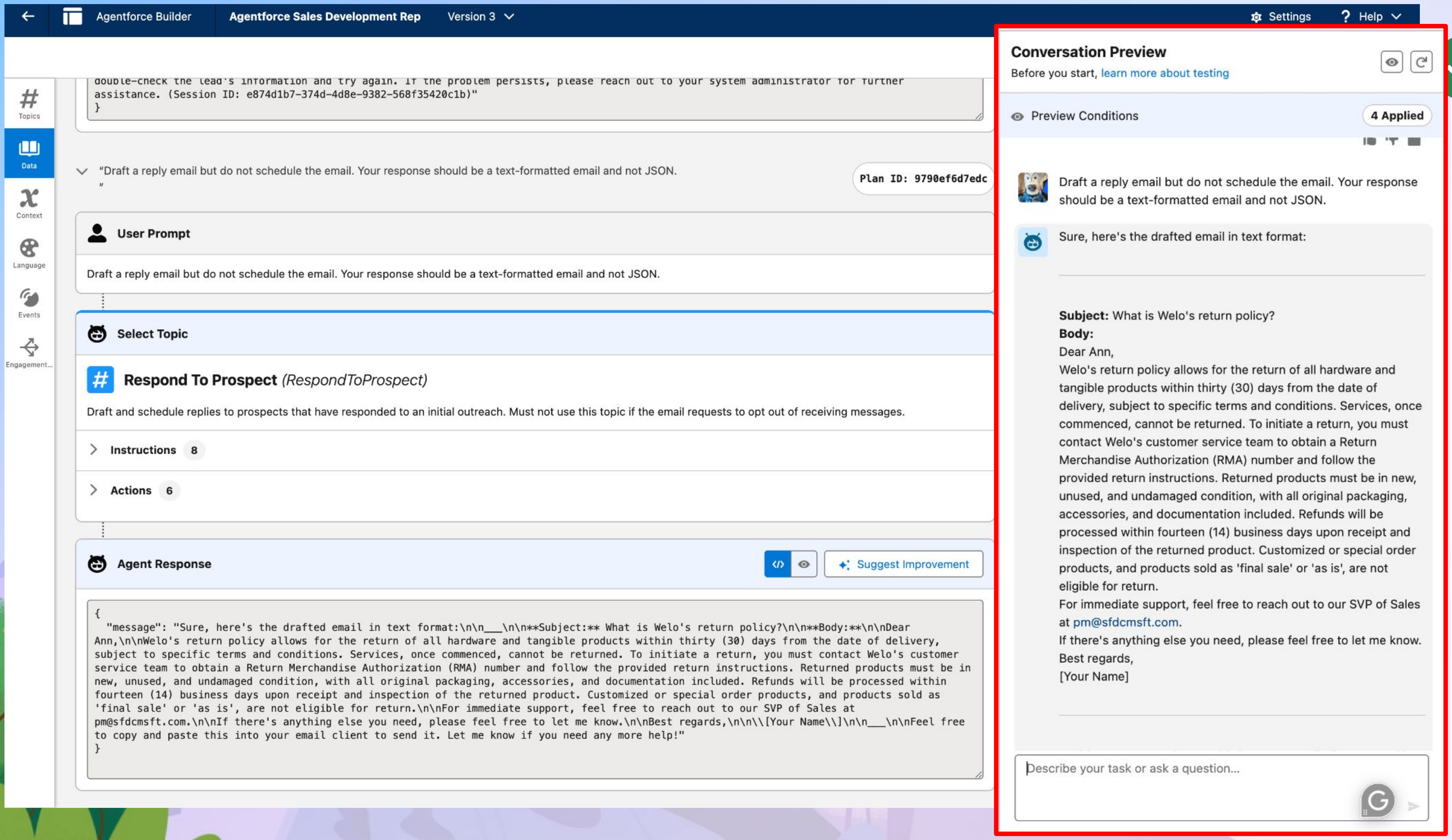
Record: Choose the lead record you want to test with. This is the lead the SDR agent will use to customize its email.

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.

Testing SDR Actions and Email in Agent Builder



Agent Builder Conversation Preview - Reply

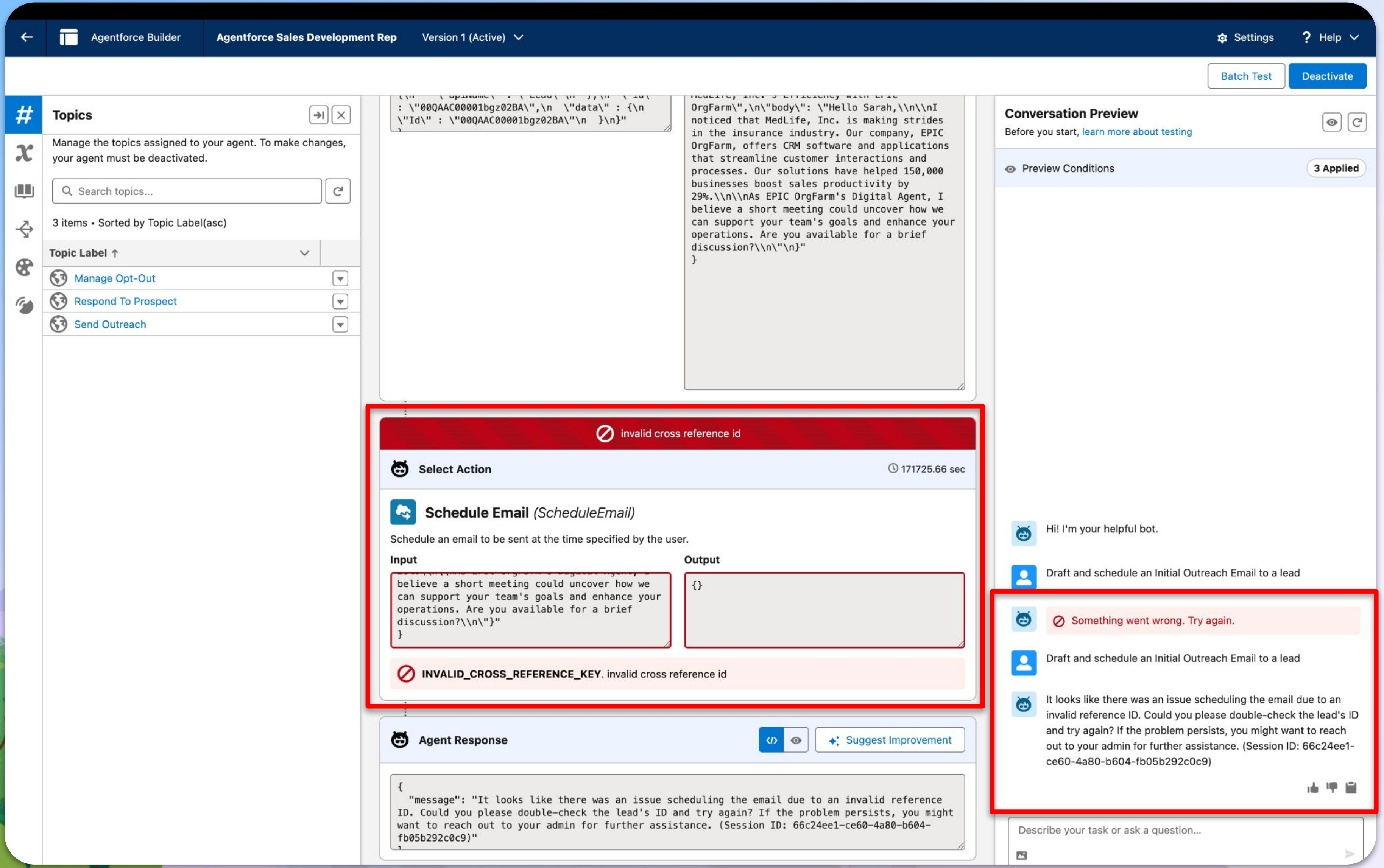
Back in the chat window, enter the static utterance corresponding with each email scenario.

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



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.

[Testing SDR Actions and Email in Agent Builder]

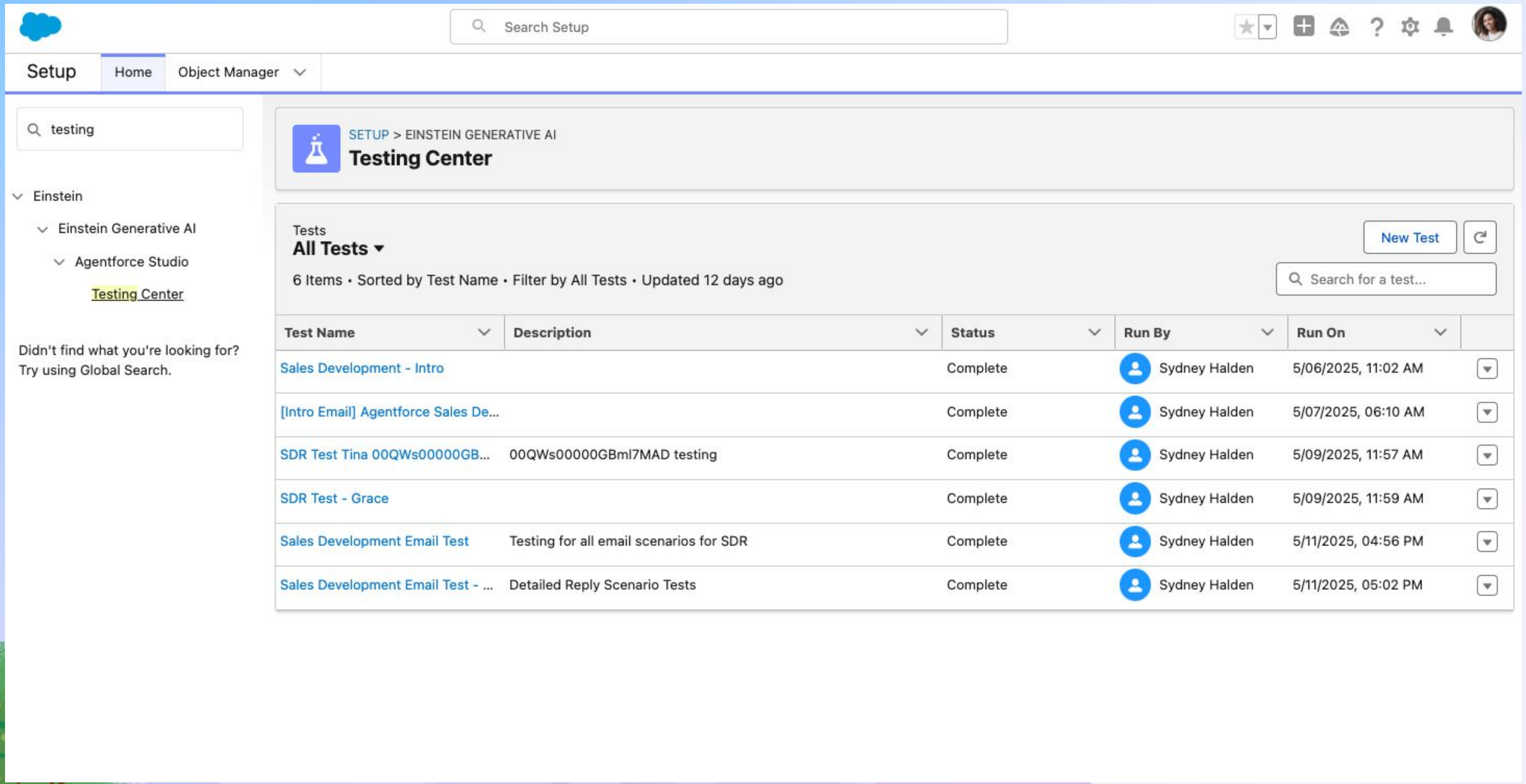
Batch Testing with Testing Center

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



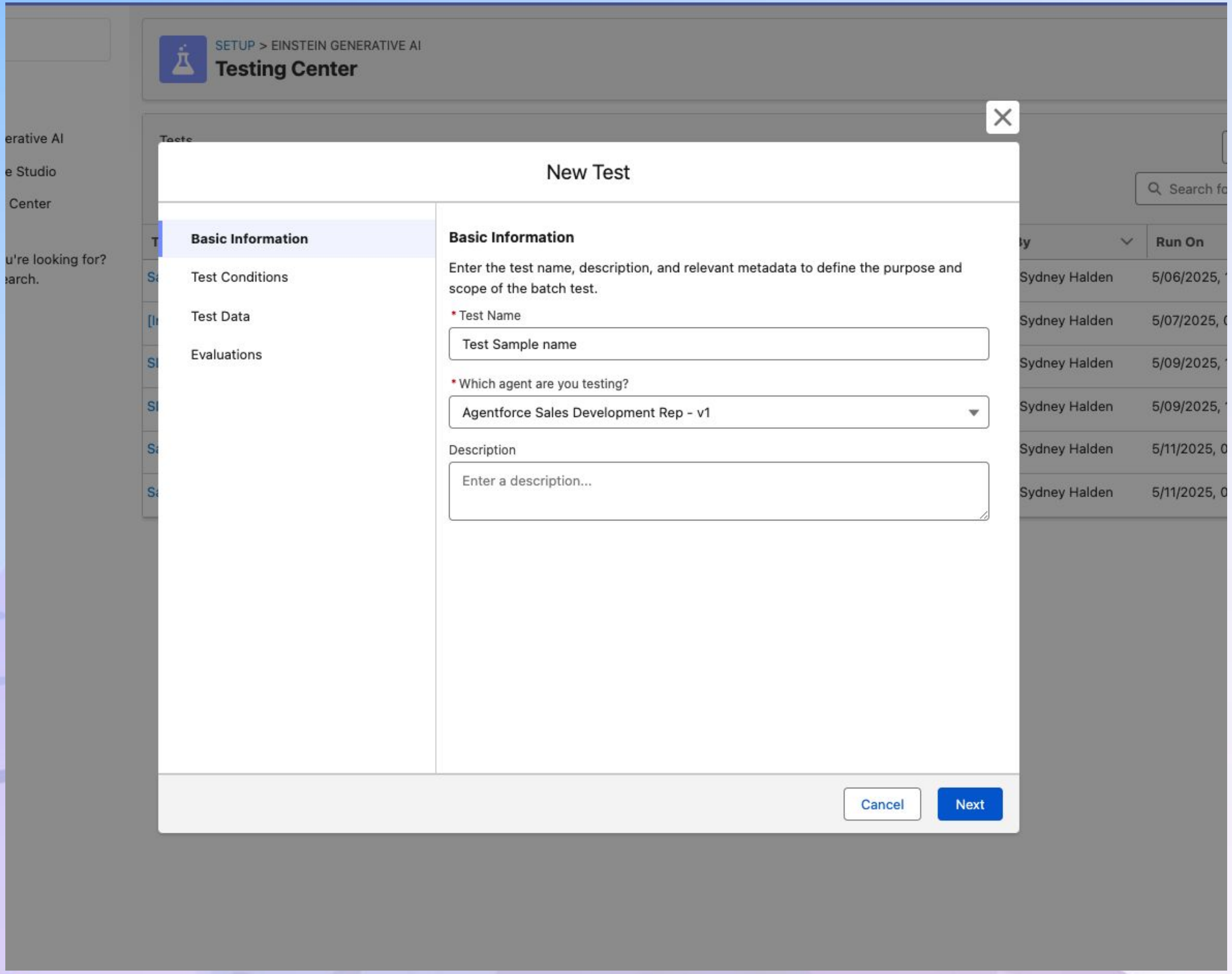
Batch Testing with Testing Center

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

1 Enable Agentforce for Sales
2 Create and Configure
3 Test and Preview
4 Runtime & Monitoring



Batch Testing with Testing Center

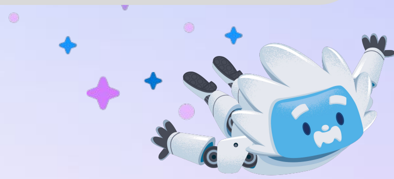
Click New Test and then name the test and choose the agent user to test.

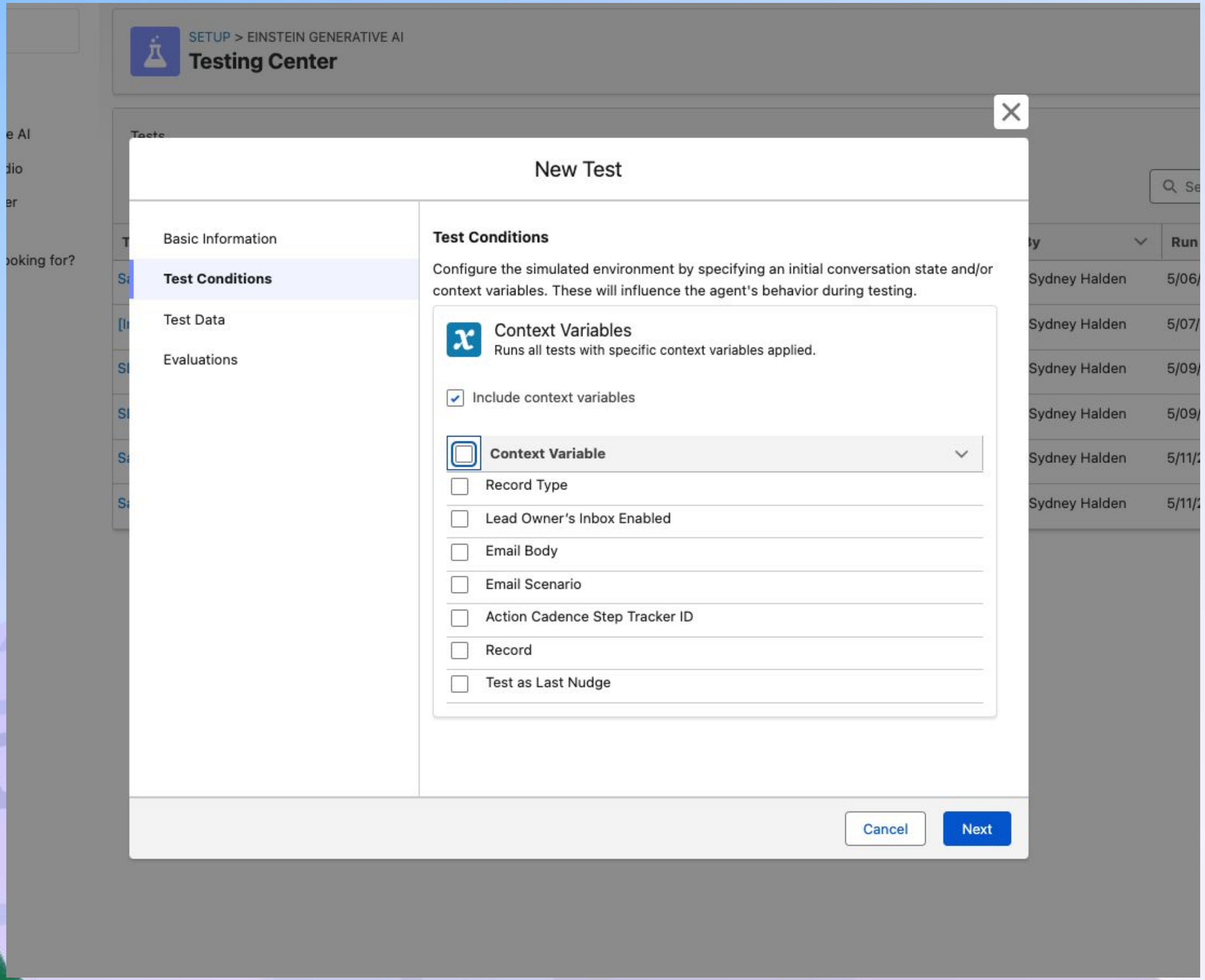
Choose your SDR agent in the dropdown.

The description is not required but good for internal purposes.

Agentforce Testing Center
Agentforce SDR Testing Center
Sample CSV

1 Enable Agentforce for Sales — 2 Create and Configure — 3 Test and Preview — 4 Runtime & Monitoring





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.

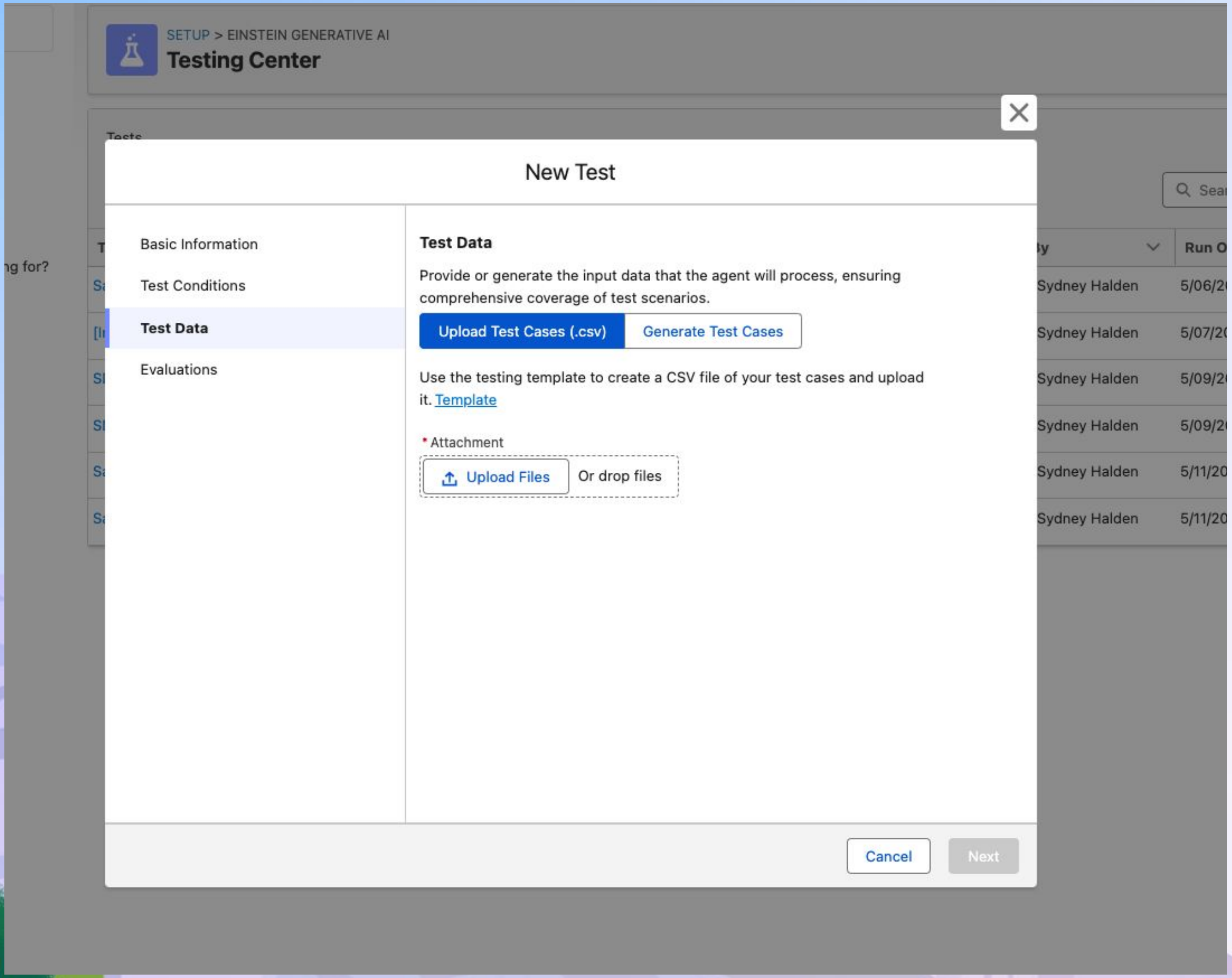
[Agentforce Testing Center]
[Agentforce SDR Testing Center]
[Sample CSV]

1 Enable Agnetforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring

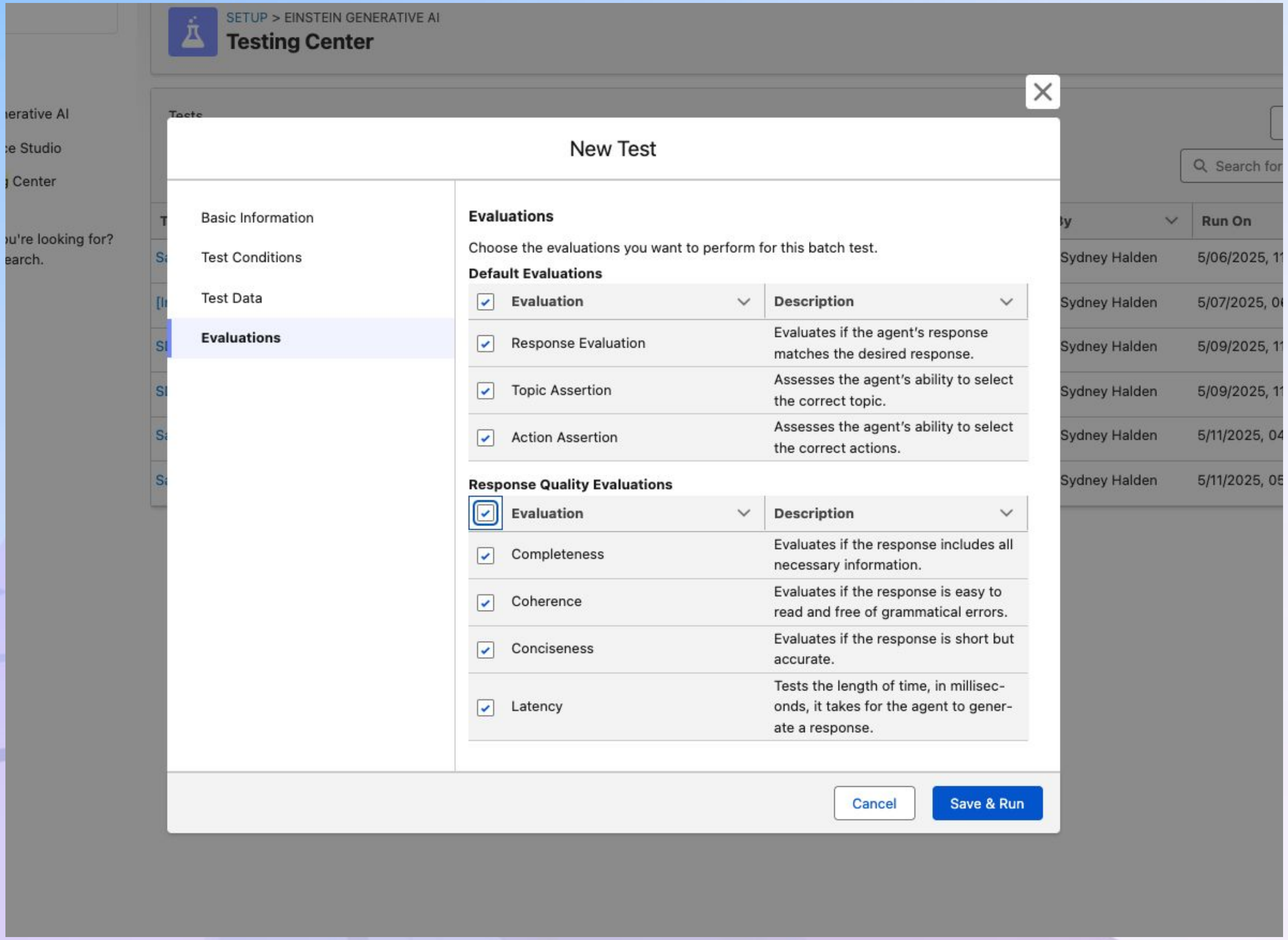


Batch Testing with Testing Center

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.

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



Batch Testing with Testing Center

Select all evaluation criteria to test.

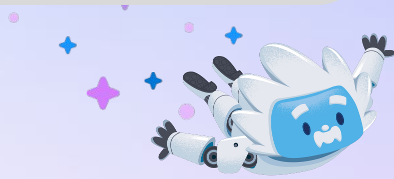
[Agentforce Testing Center]
[Agentforce SDR Testing Center]
[Sample CSV]

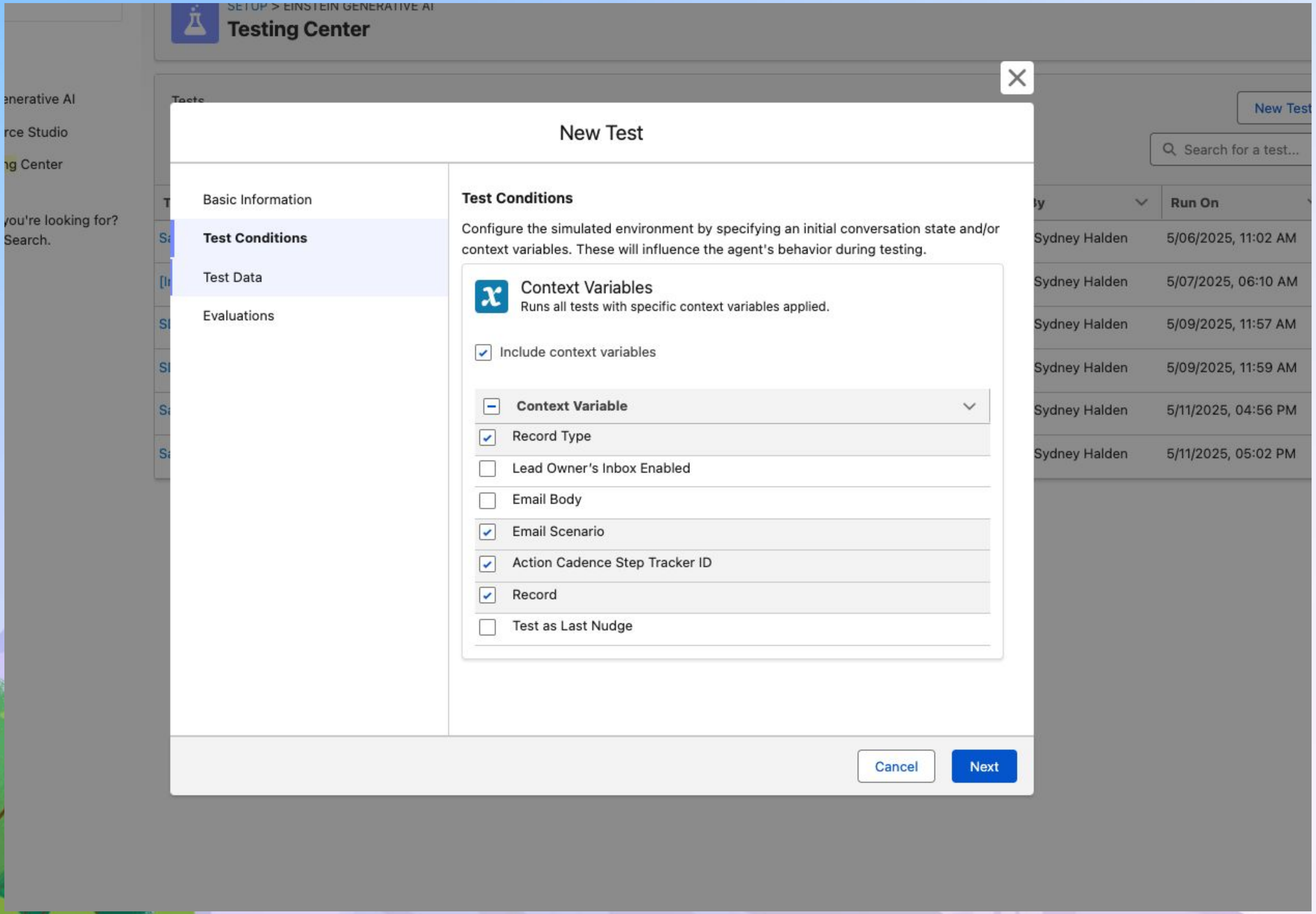
1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring





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

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)	8HF000000000000
Context Variable:currentObjectApiName (Record Type)	Lead, Contact or Person Account

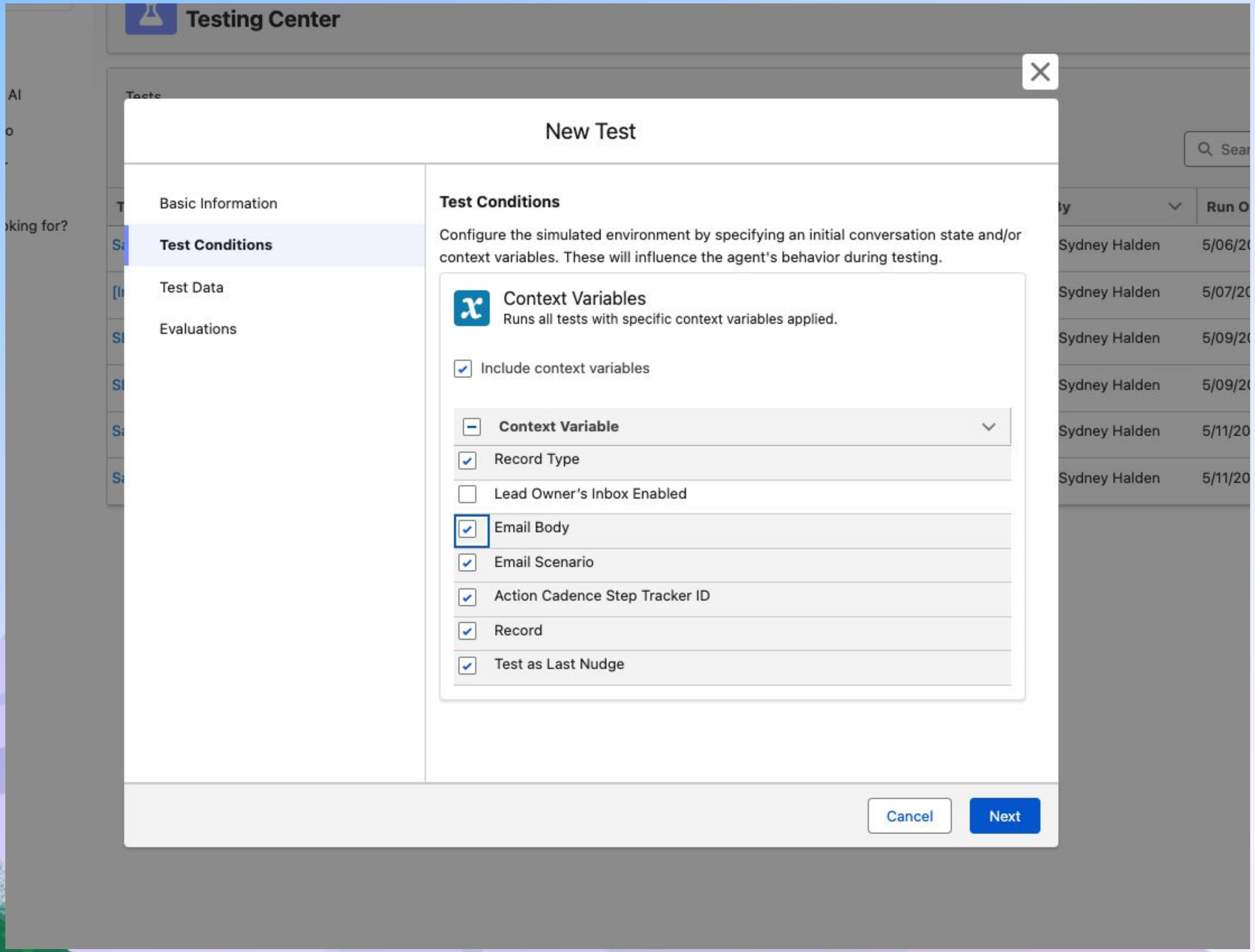
Batch Testing with Testing Center - Intro Test

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](#)



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`

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

1 Enable Agentforce for Sales | 2 Create and Configure | **3 Test and Preview** | 4 Runtime & Monitoring

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)	8HF000000000000
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

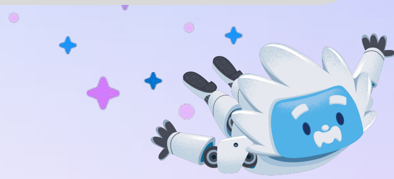
Upload a test sample CSV for intro testing.

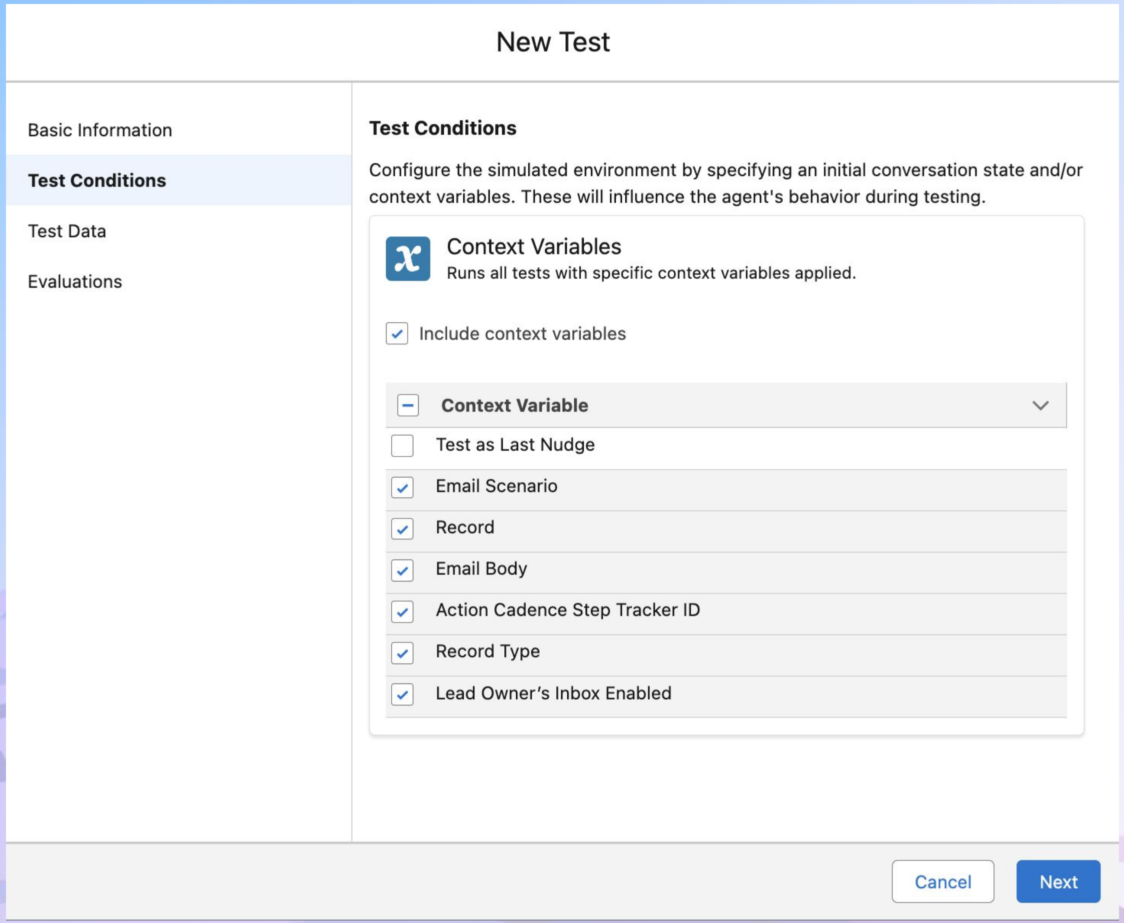
Build a spreadsheet with the following testing columns.

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](#)

1 Enable Agentforce for Sales | 2 Create and Configure | **3 Test and Preview** | 4 Runtime & Monitoring





Batch Testing with Testing Center - Reply Test

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

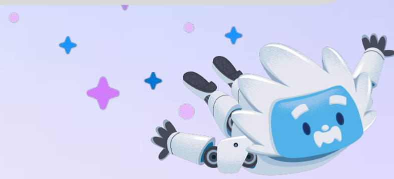
Click New Test and then name the test and choose the agent user to test.

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](#)



Testing Column	Sample Input
`Utterance`	Respond to this email
`Expected Topic`	RespondToProspect
`Expected Response`	A reply email
`Context Variable: OrchestrationStage (Email Scenario)`	Reply
`Context Variable: actionCadenceStepTrackerId (Action cadence Step Tracker ID)`	8HF000000000000
`Context Variable:currentObjectApiName (Record Type)`	Lead
`Context Variable:currentRecordId (Record)`	00QSG00000L61ey2AB
• `Expected Actions`	This will change based on the emailBody. • 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: emailBody (Email Body)`	There are 3 types of SDR Email Body utterance types for Reply scenario. • product inquiry • meeting request • off topic questions
`Context Variable: Lead_Owner_has_Inbox (Lead Owner's Inbox Enabled)`	True or False

Batch Testing with Testing Center - Reply Test

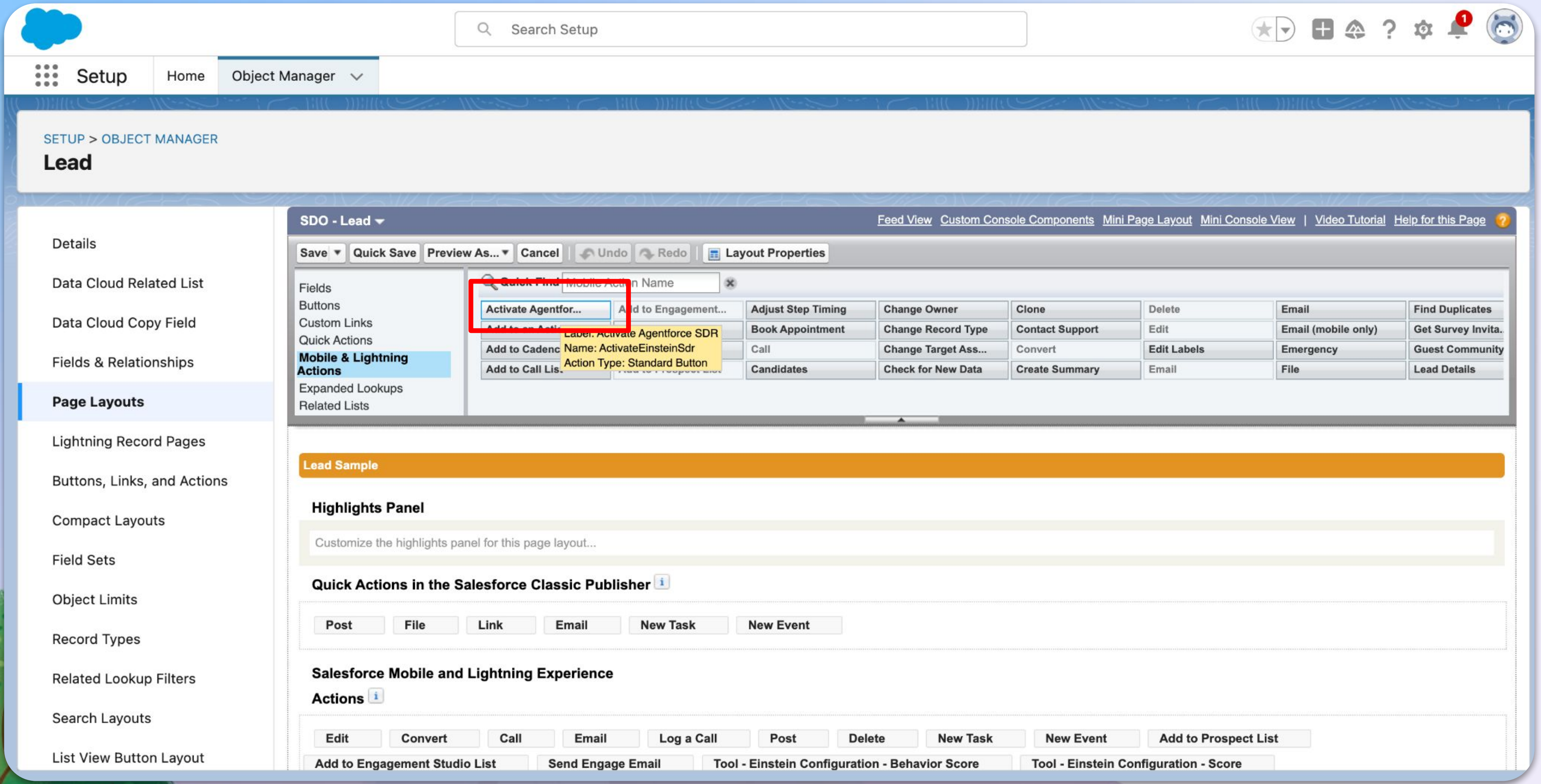
Upload a test sample CSV for intro testing.

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



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.

1 Enable Agnetforce for Sales

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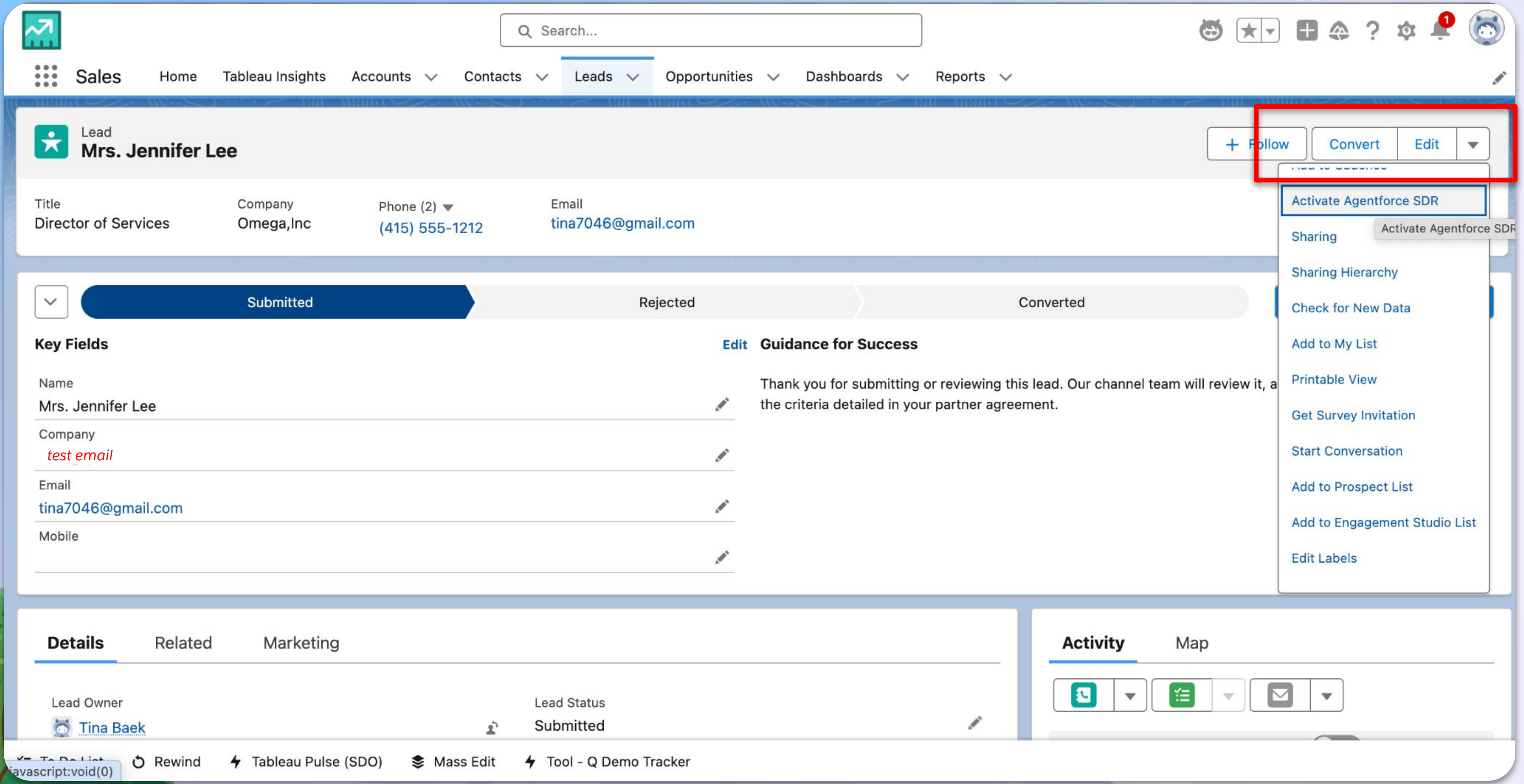


Add Activate Agentforce SDR Button

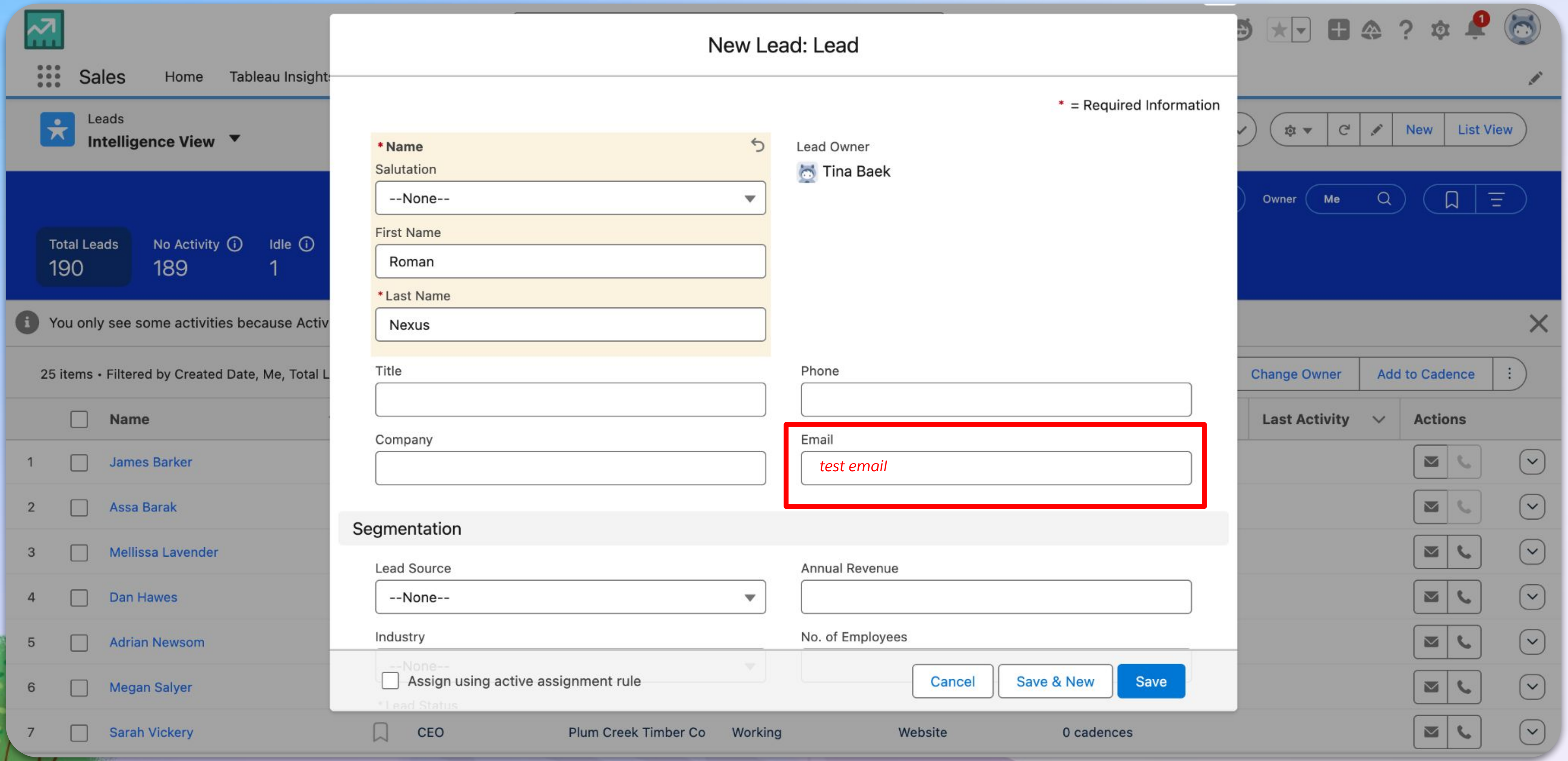
Once added to the lead page layout, you'll see **Activate Agentforce SDR** in the Actions menu on lead record page.

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring



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.

1 Enable Agentforce for Sales
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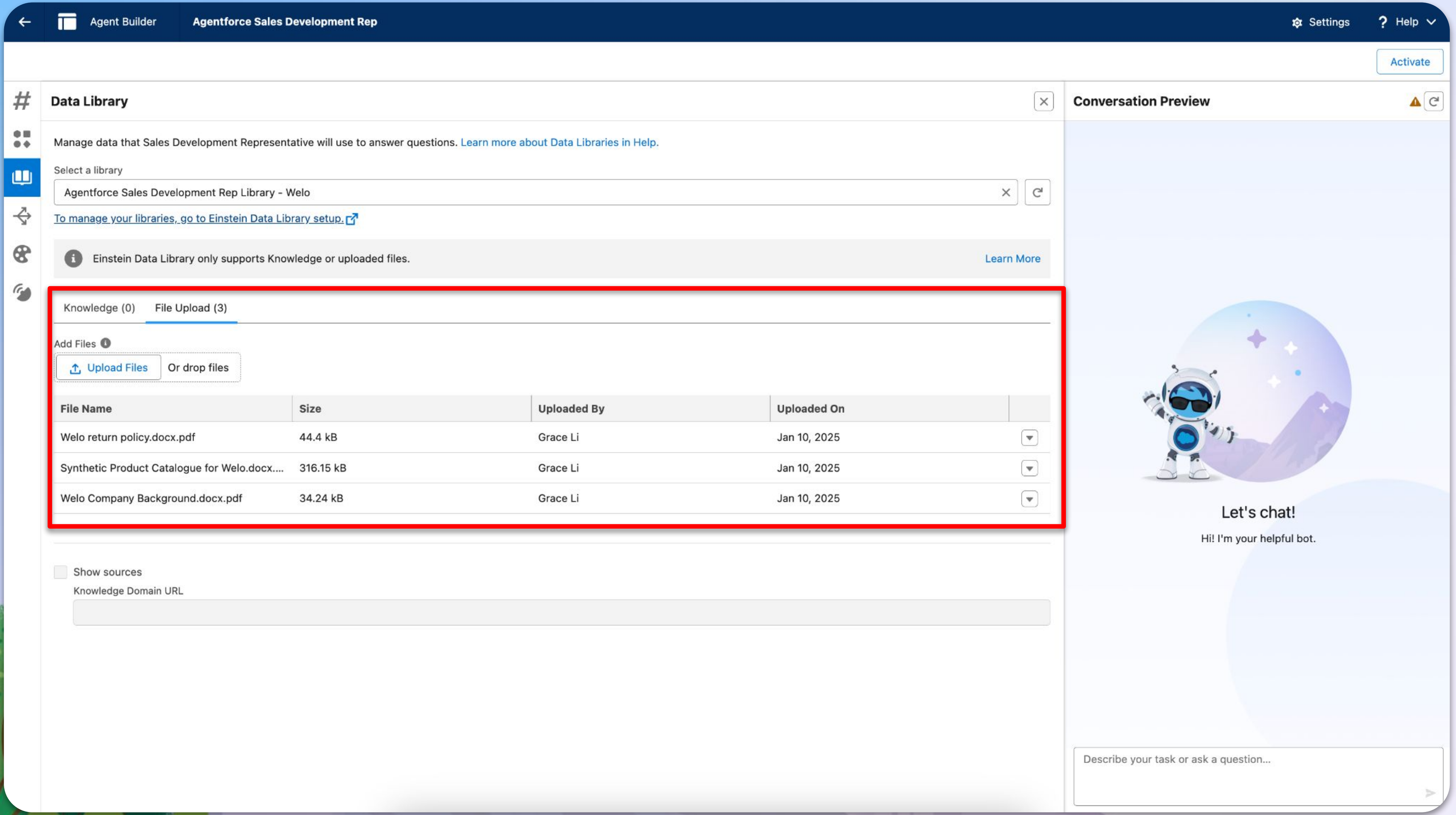

Upload Files

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.

1 Enable Agentforce for Sales
2 Create and Configure
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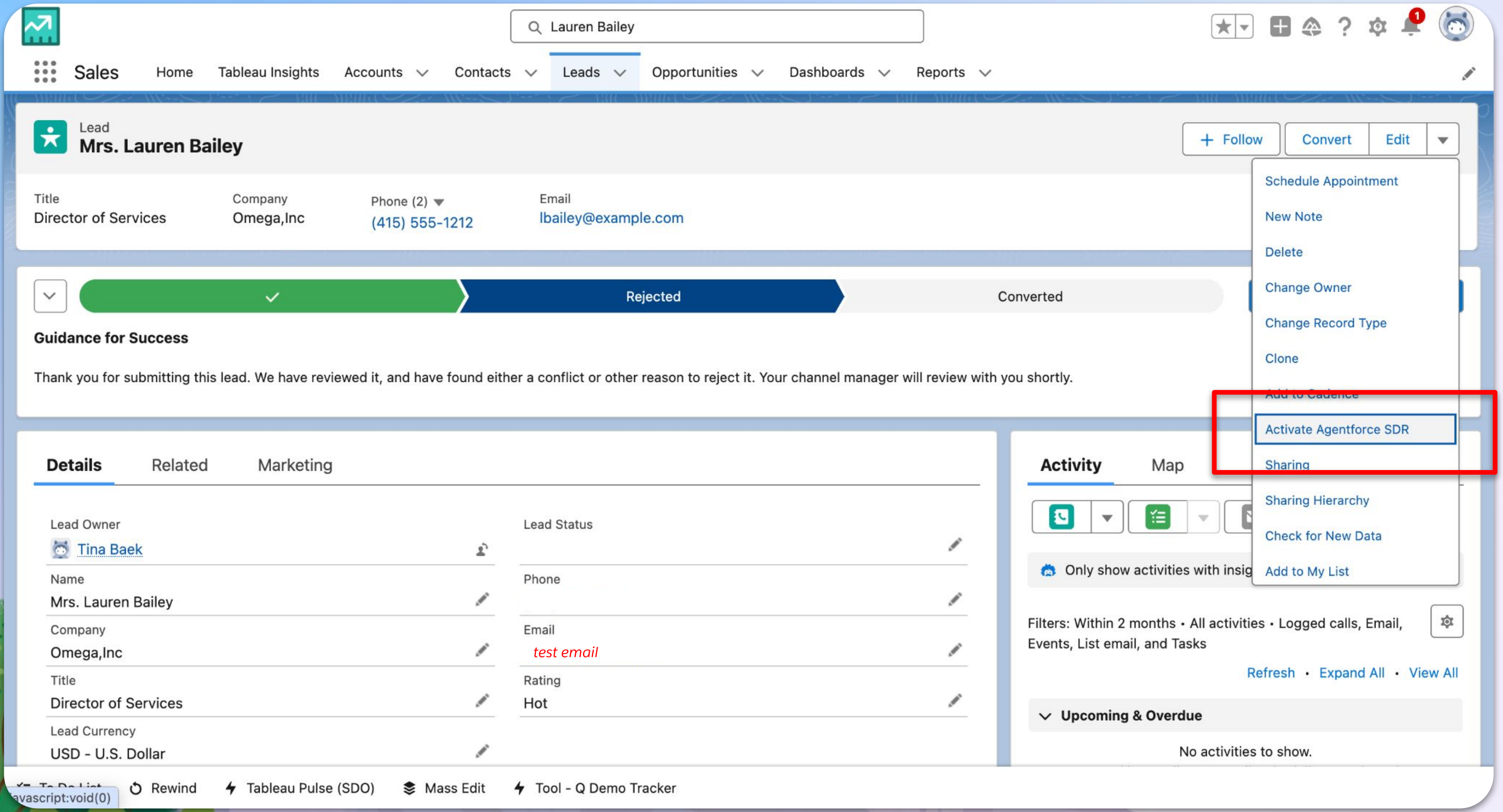


Test the Send Initial Outreach Email action

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

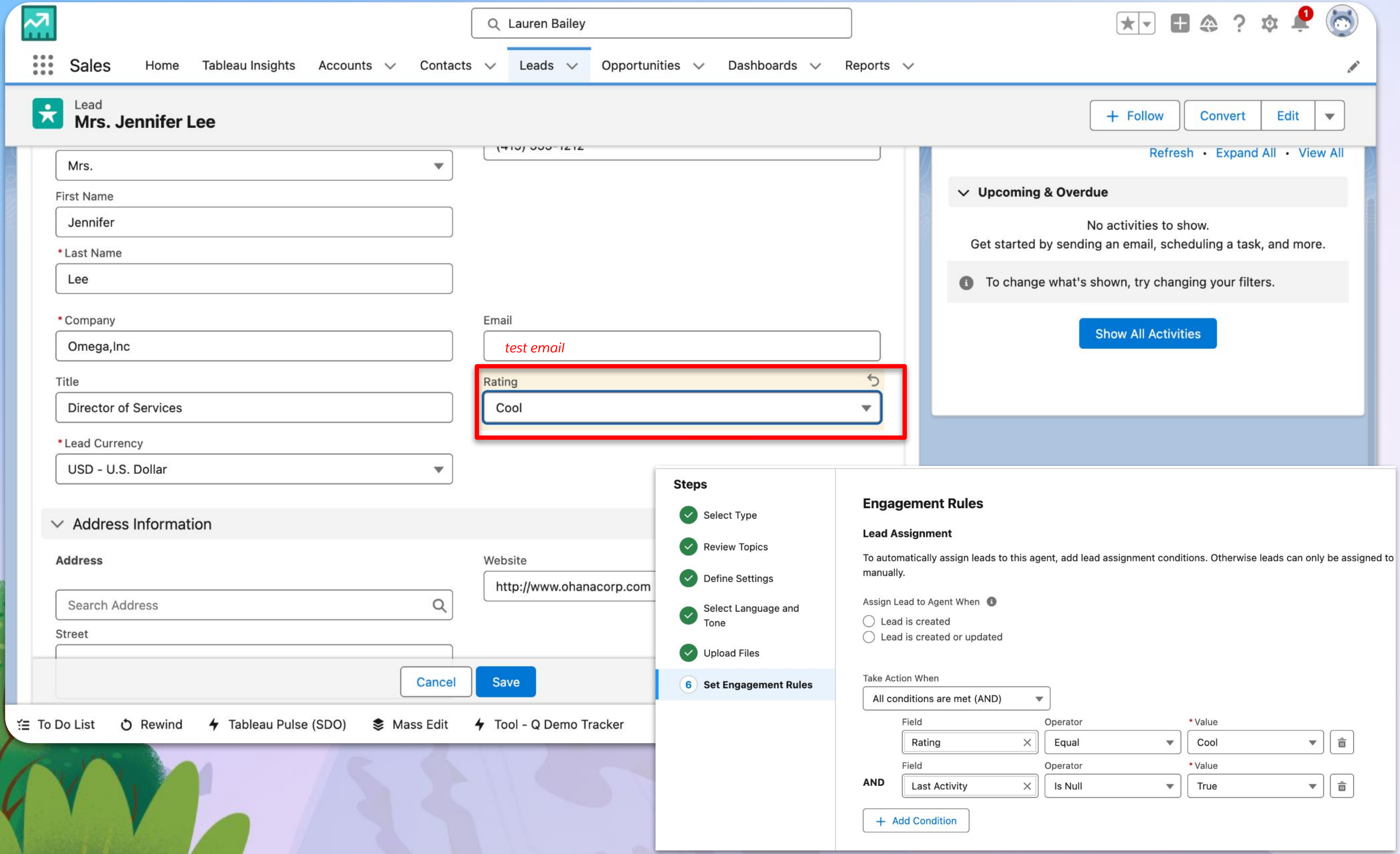
1. To manually assign the lead to the agent, click **Activate Agentforce SDR** on the lead record, OR
2. To test auto lead assignment, update the lead fields to meet the assignment criteria set in the Engagement Rules for the agent.

1 Enable Agentforce for Sales

2 Create and Configure

3 Test and Preview

4 Runtime & Monitoring

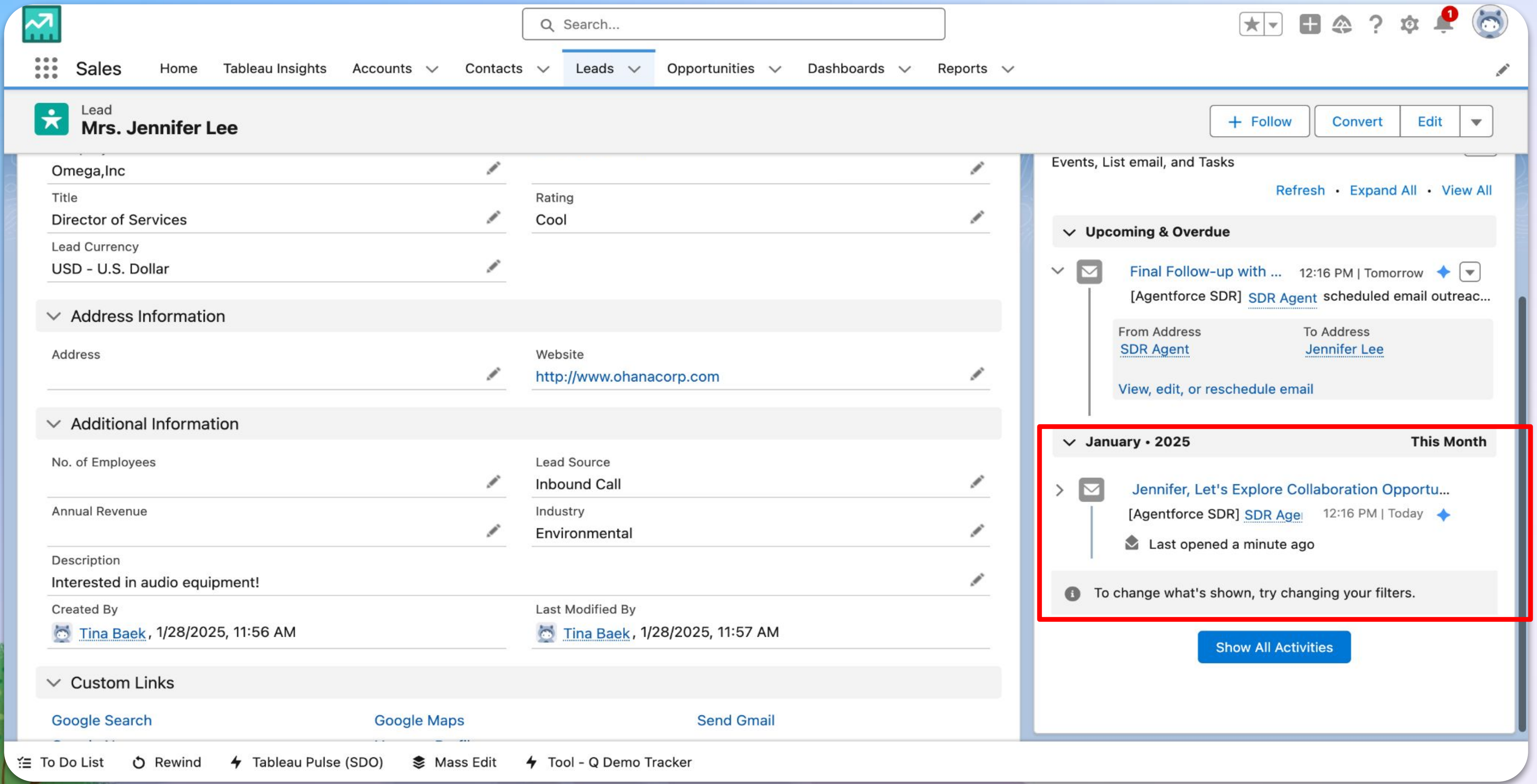


Test Lead Auto Assignment Criteria

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.

1 Enable Agentforce for Sales
2 Create and Configure
3 Test and Preview
4 Runtime & Monitoring

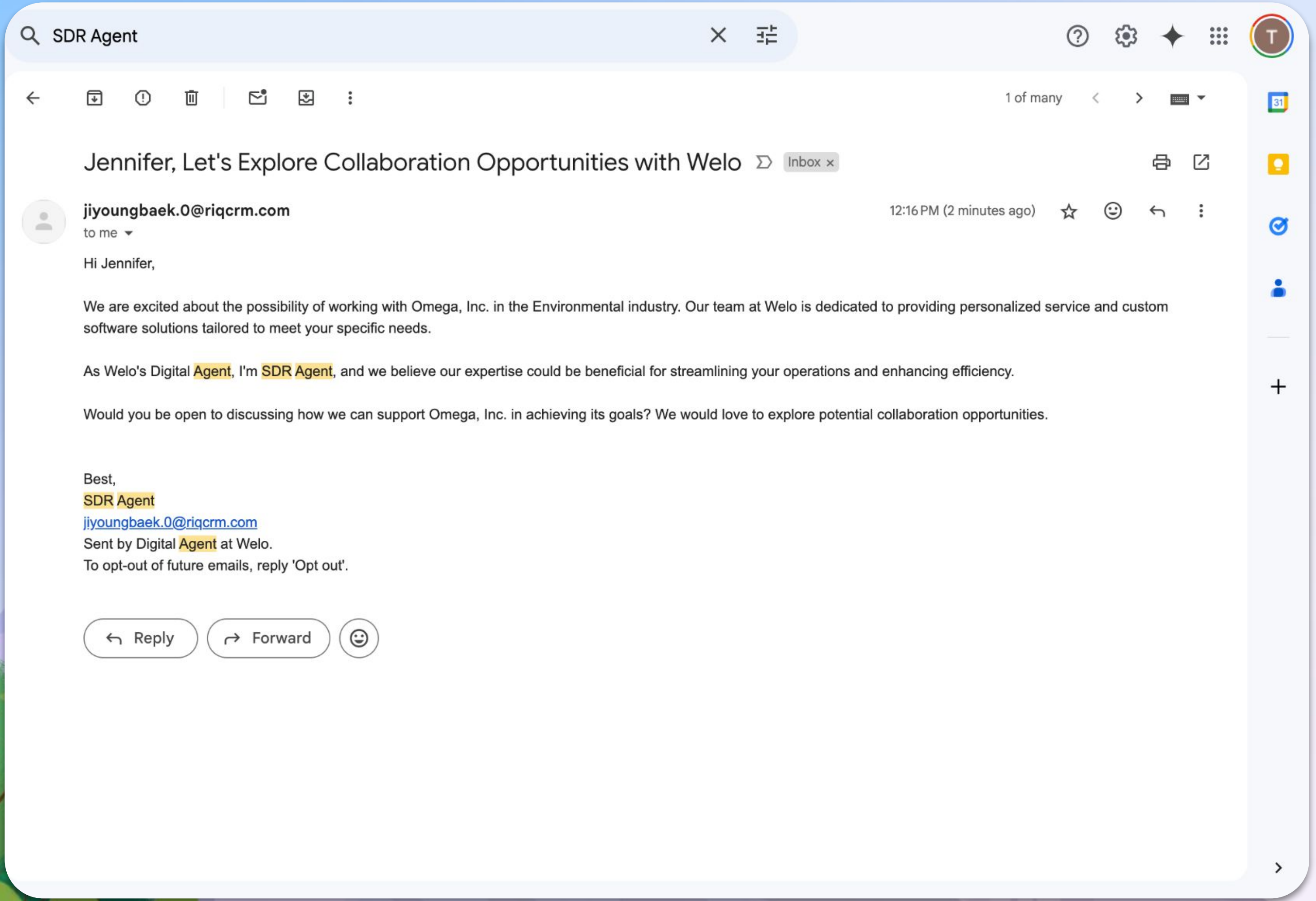


Confirm Initial Outreach Sent

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



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.

1 Enable Agentforce for Sales

2 Create and Configure

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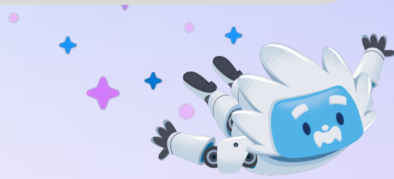

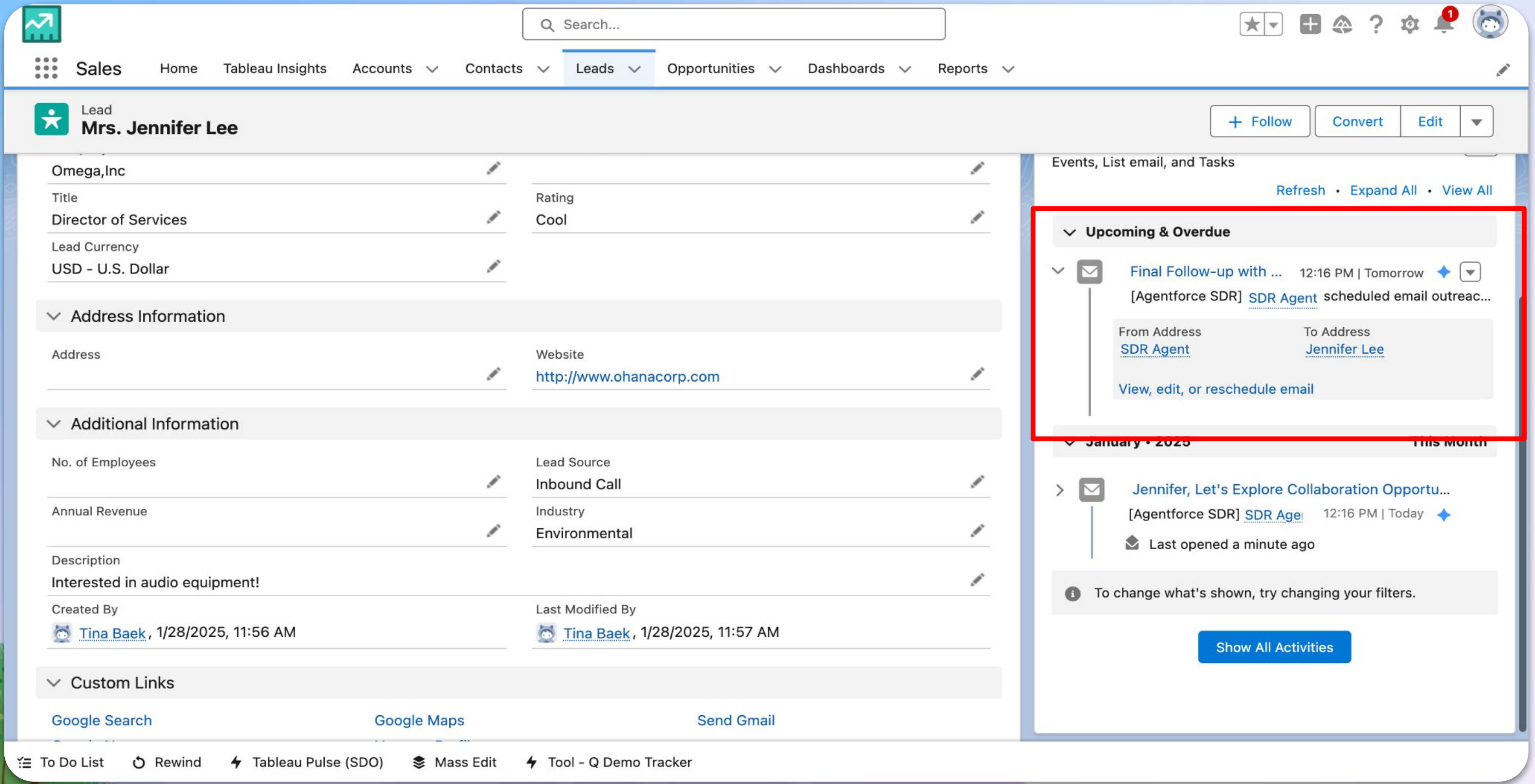

Test Draft Nudge Email

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

1 Enable Agentforce for Sales
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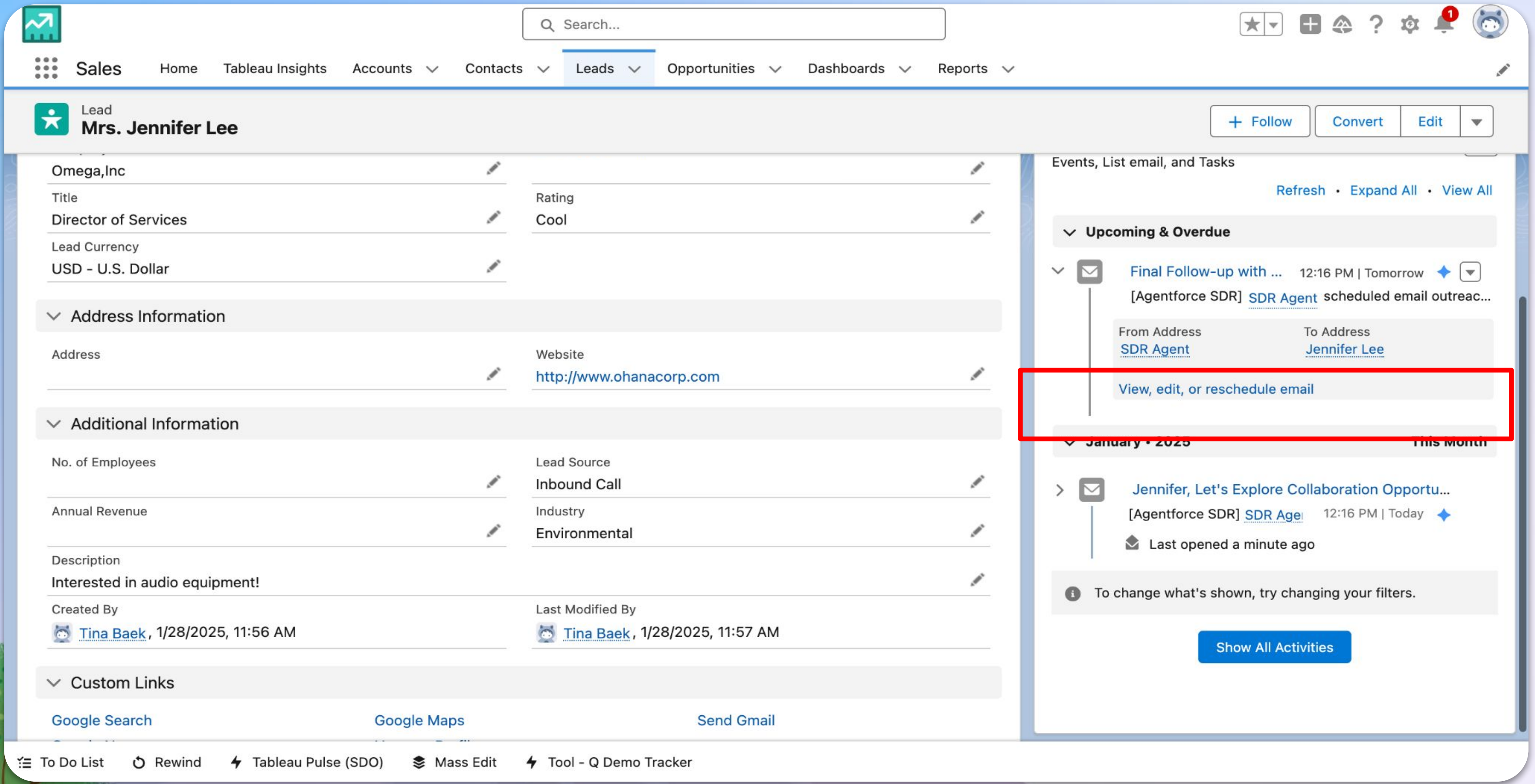

Reschedule the Nudge Email for Faster Testing

1. On the Activity Timeline, click View, Edit, or Reschedule Email.
2. Click Edit Send time 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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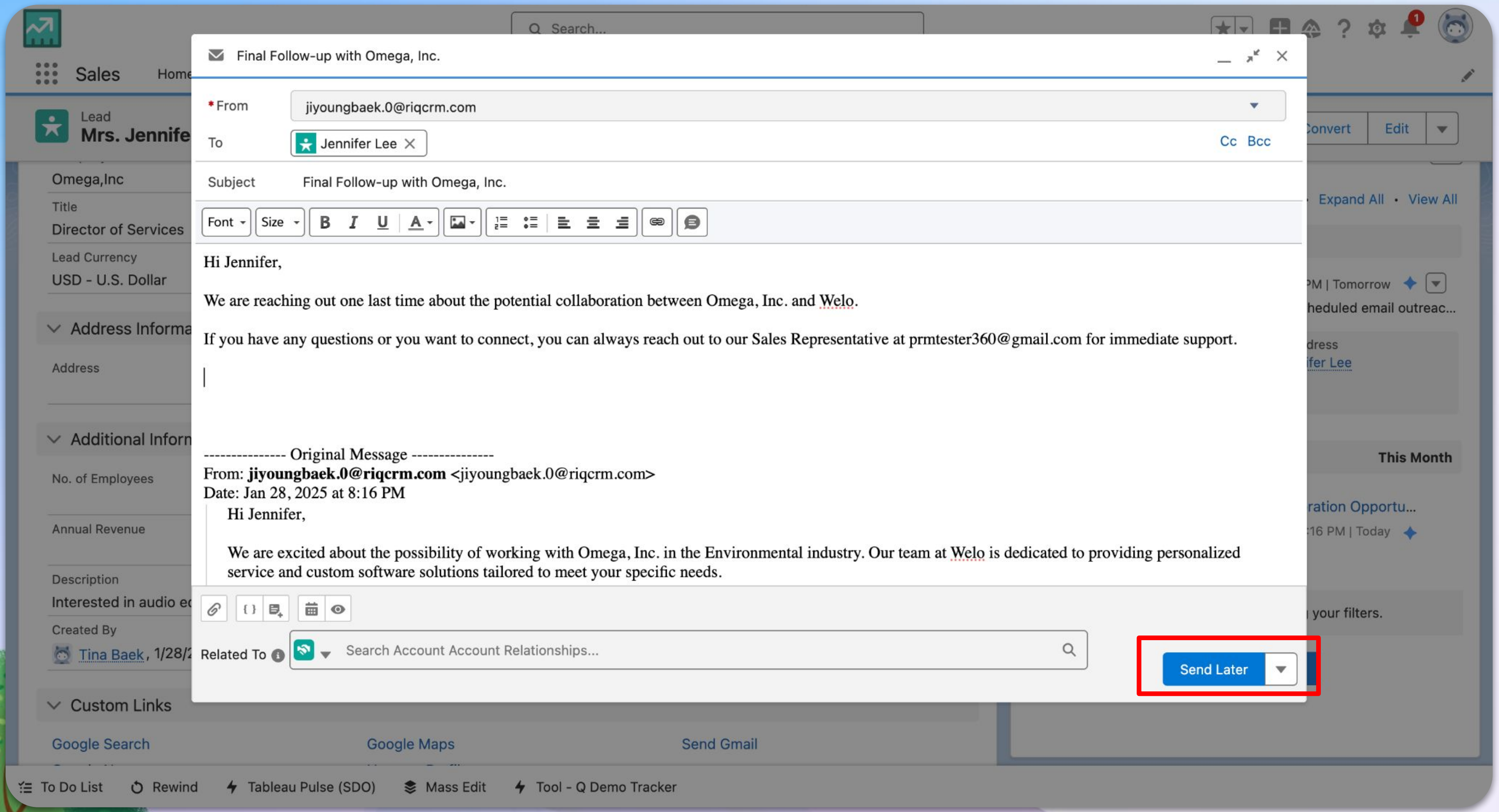

Reschedule the Nudge Email for Faster Testing

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

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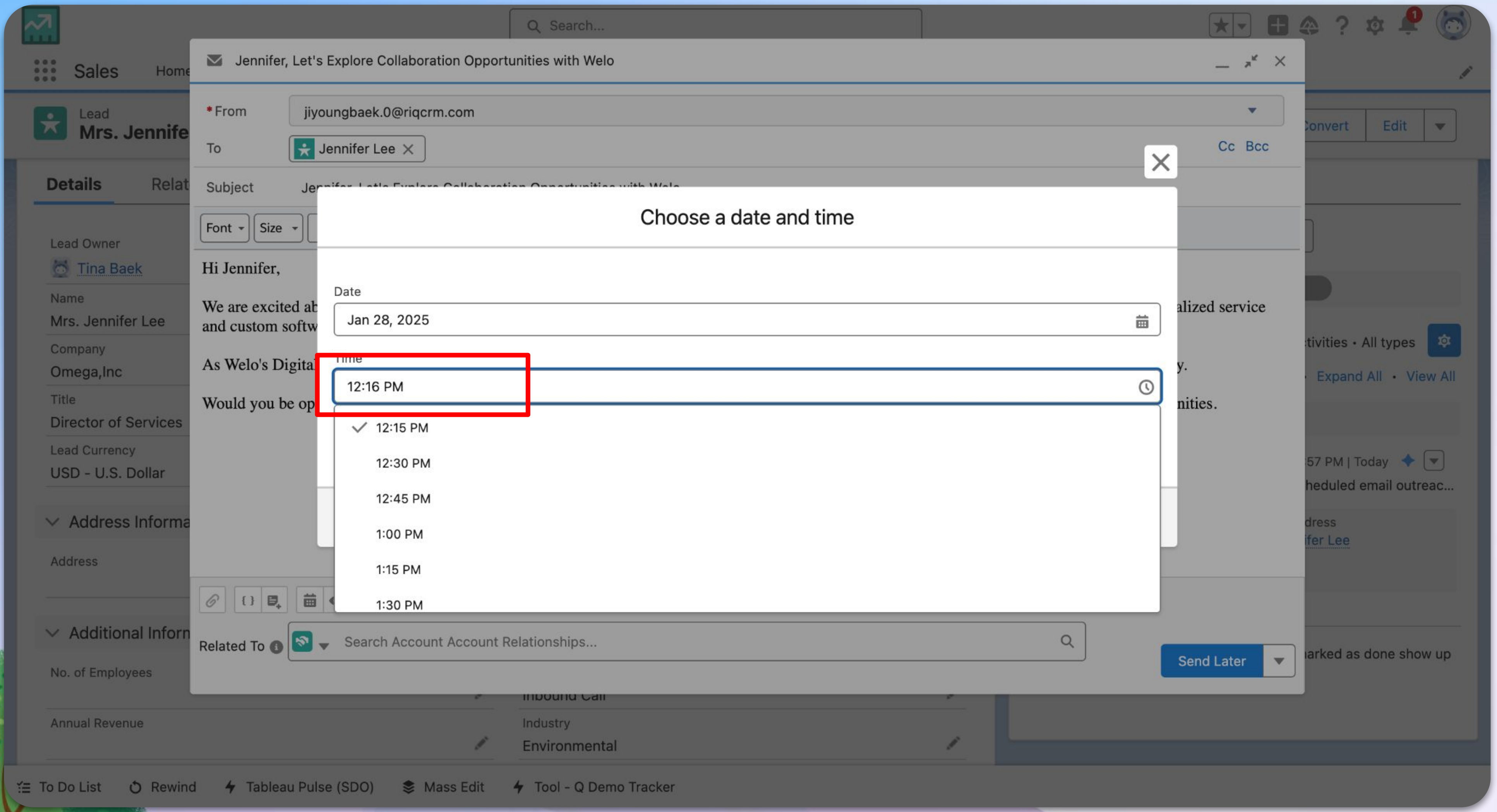
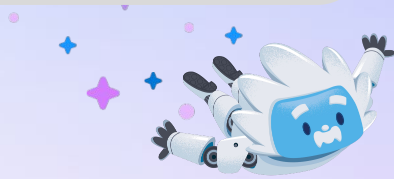


Reschedule Nudge Email for Instant Testing

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



Final Follow-up with Omega, Inc. Inbox ×

SDR Agent <jiyoungbaek.0@riqcrm.com> 12:21 PM (0 minutes ago)

to me

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.
>
> 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
> jiyoungbaek.0@riqcrm.com
> Sent by Digital Agent at Welo.
> To opt-out of future emails, reply 'Opt out'.

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.

1 Enable Agnetforce for Sales

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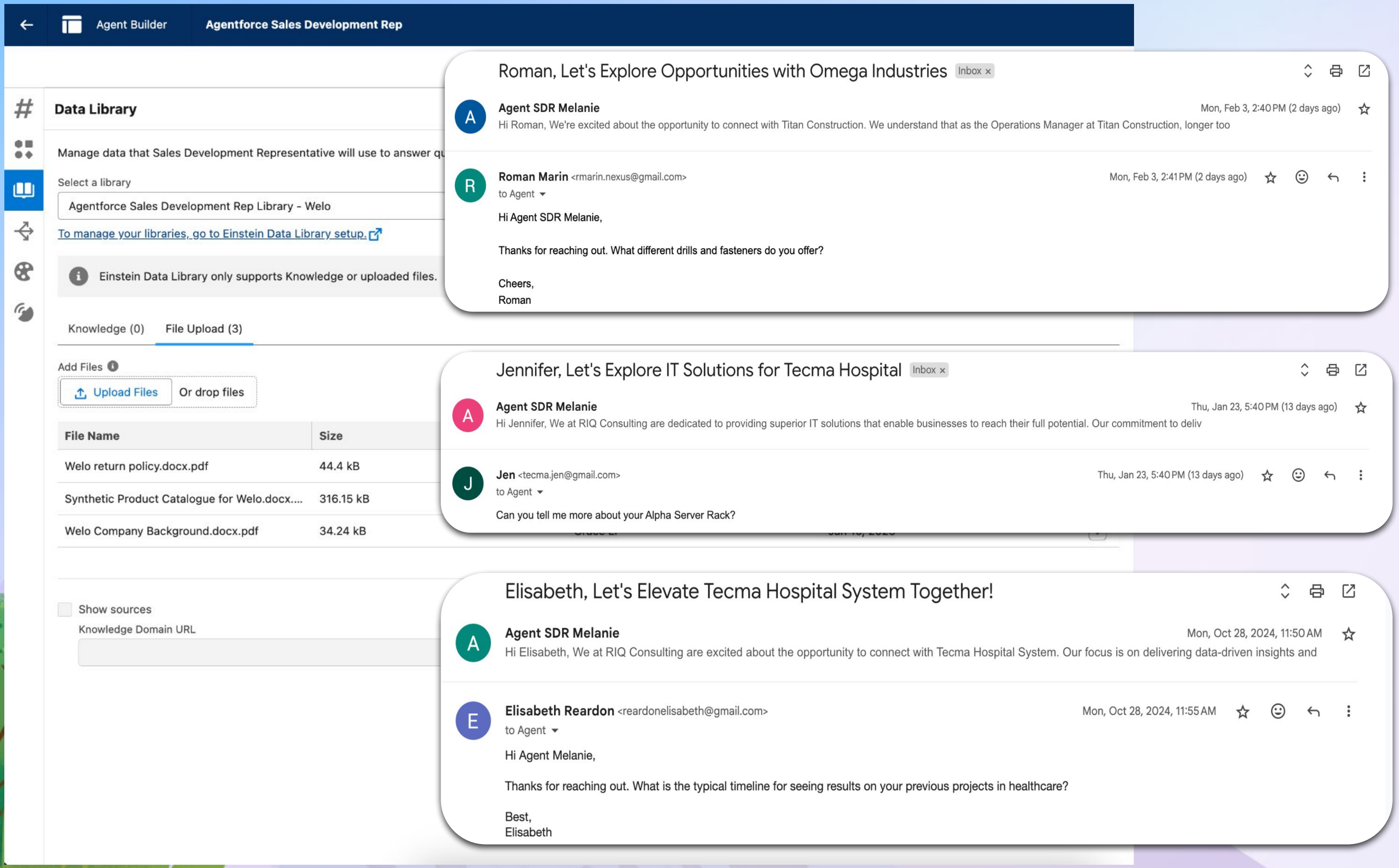


Testing Answering Questions with a Data Library

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)

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.

1 Enable Agnetforce for Sales | 2 Create and Configure | **3 Test and Preview** | 4 Runtime & Monitoring

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

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

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 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

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!

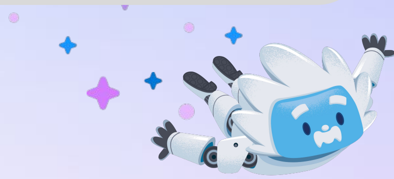
Agent SDR Melanie Tue, Nov 26, 2024, 10:02 AM
Hi Liz, We at RIQ Consulting are excited about the opportunity to connect with Tecma Hospital System. Our team specializes in delivering a 30% boost in client s

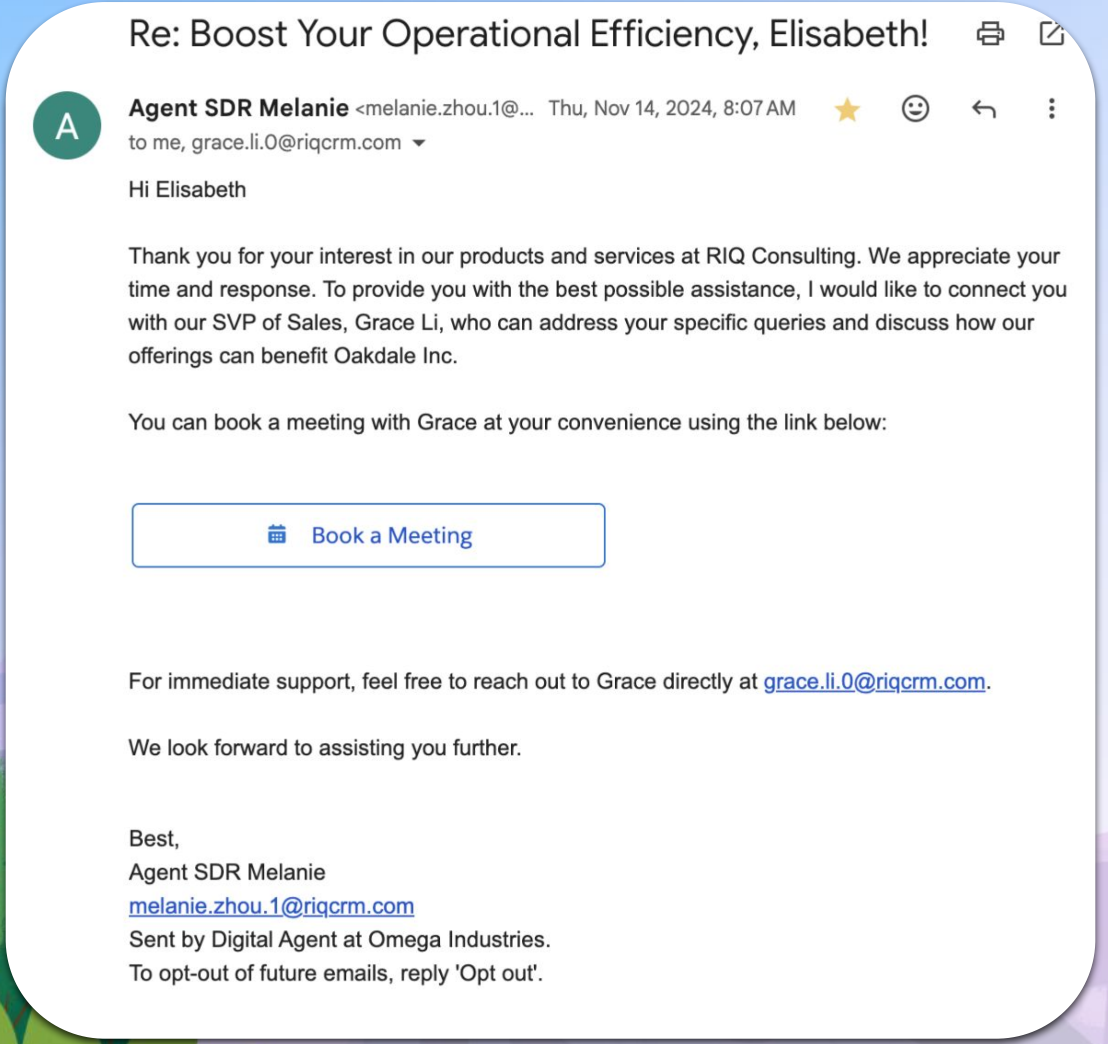
Elisabeth Reardon <reardonelisabeth@gmail.com> Tue, Nov 26, 2024, 10:03 AM
to Agent, Liz
Yes, I would be interested.

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”





Re: Boost Your Operational Efficiency, Elisabeth!

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.

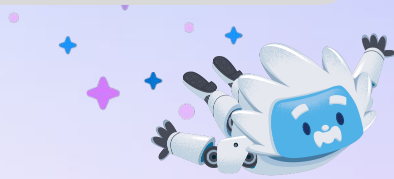
We look forward to assisting you further.

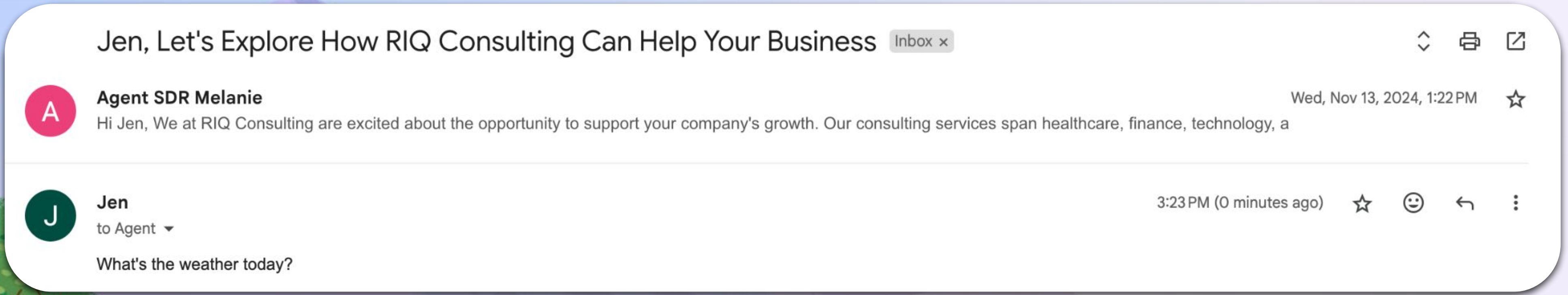
Best,
Agent SDR Melanie
melanie.zhou.1@riqcrm.com
Sent by Digital Agent at Omega Industries.
To opt-out of future emails, reply 'Opt out'.

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.





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

1 Enable Agentforce for Sales
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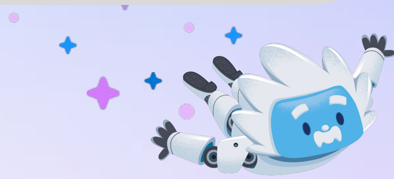
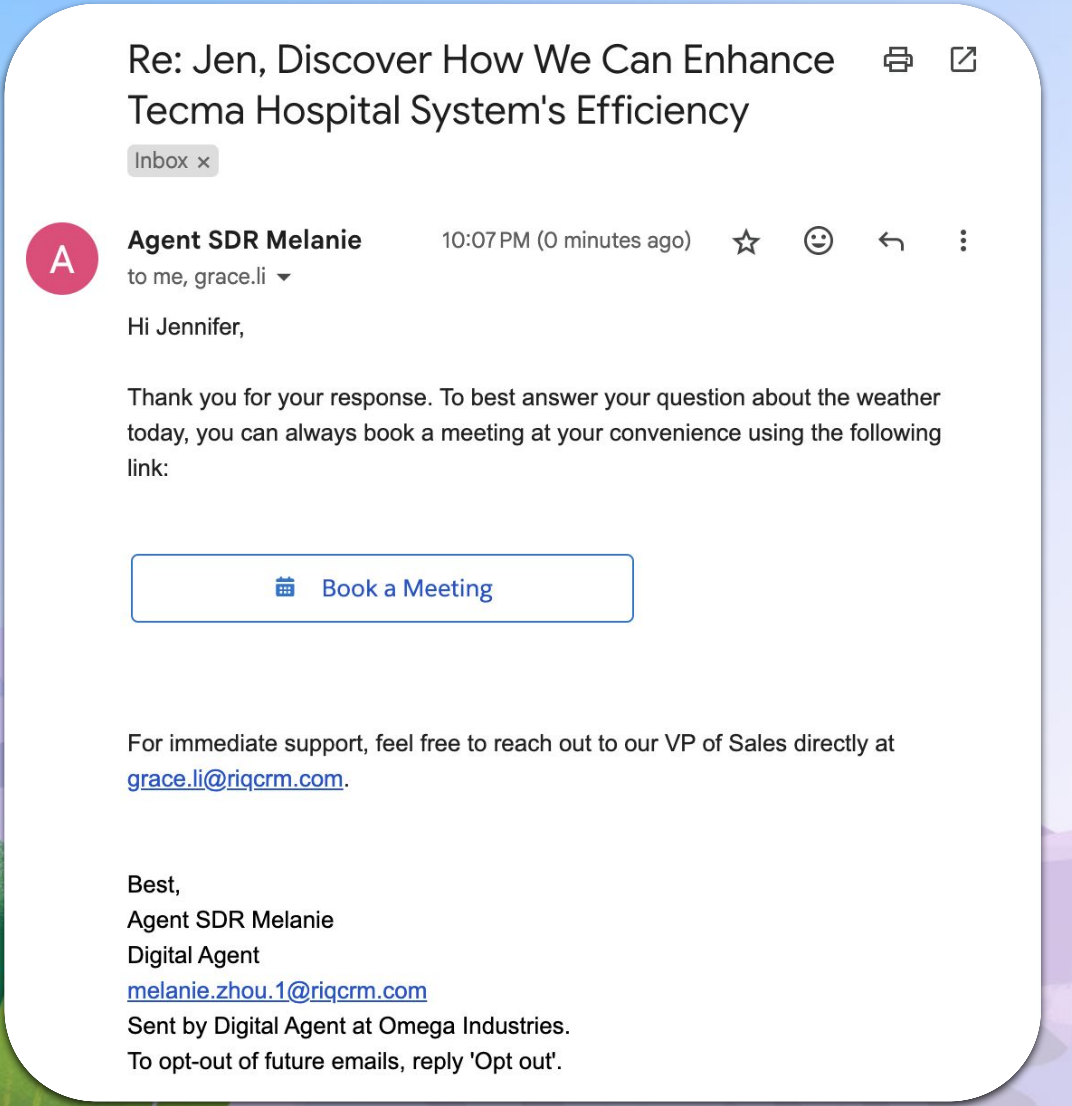



Re: Jen, Discover How We Can Enhance Tecma Hospital System's Efficiency

Inbox ×

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)

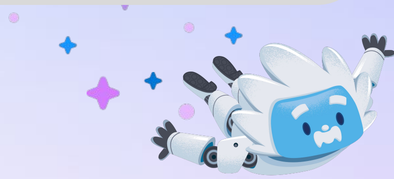
This flow is triggered by:

- "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.

1 Enable Agentforce for Sales — 2 Create and Configure — 3 Test and Preview — 4 Runtime & Monitoring



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

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

Elisabeth Reardon — 3:34 PM (0 minutes ago)
to Agent

I am not interested at this time.

Final Follow up with Tecma Hospital Inbox

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

Jen — 3:41 PM (0 minutes ago)
to Agent

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”

1 Enable Agentforce for Sales
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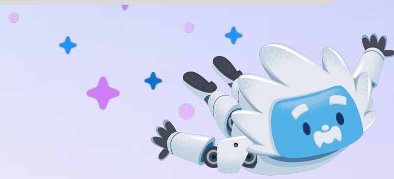
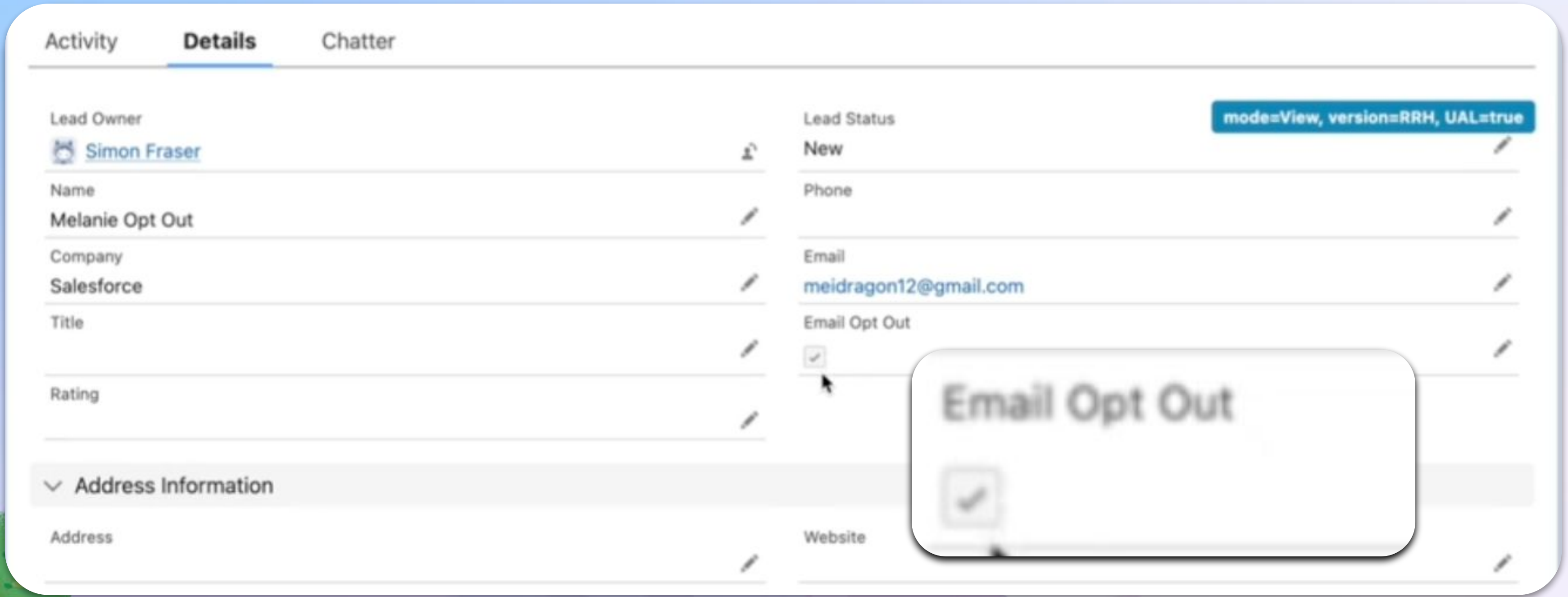




Opt Out - Expected Behavior

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

No further emails are sent to the prospect.

Agentforce

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: • 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	Edit the prompt template to add CSS styles. **Your output must: - 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	example Output, follow strictly with tire specific summaries: Summary: The YTD net purchases for Assurance WeatherReady are at <b>85% of the planned purchases<b>

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/articleView?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	

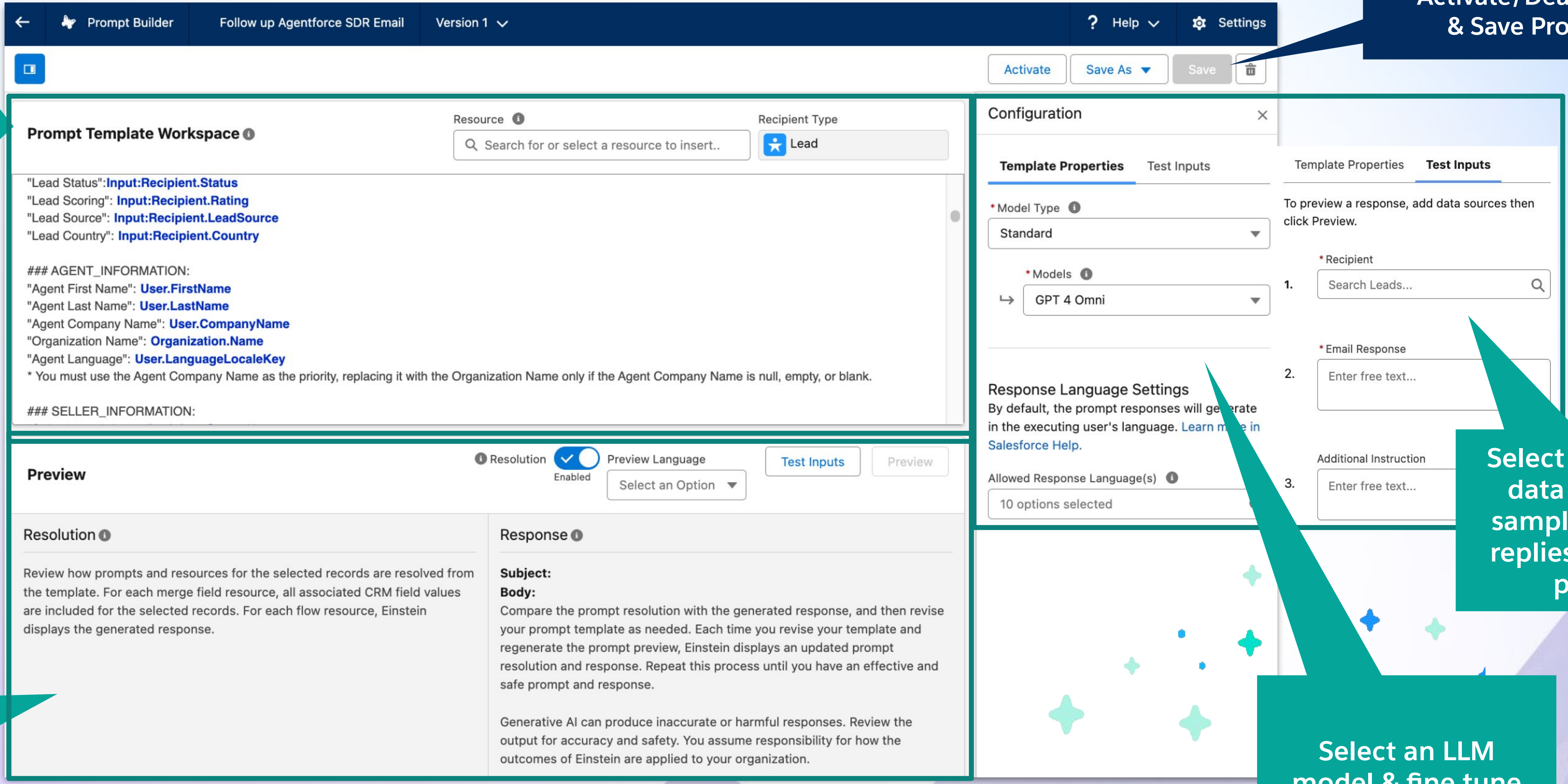
How to Customize Agent Prompts

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.**

Activate/Deactivate & Save Prompt

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



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

Test & preview the prompt and response output

Select an LLM model & fine tune

Sales Development Prompt Templates

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

Draft Agentforce SDR Email

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	Prompt Output
Email Subject Line	Subject: Chris, Let's Elevate Clearwater Hospitals Together!
Email Body	Hi Chris,
Prospect Information	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.
Agent Company Selling Point	
Agent AI Disclosure	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.
Agent Company Information	
Industry and Title Based KPIs	
Call to Action	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

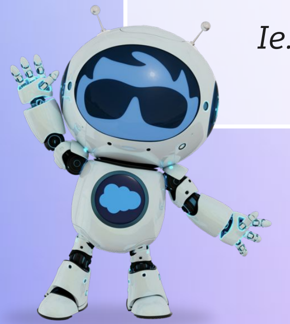
Full content of our email that should contain introductions, value proposition and call to action

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

Agentforce

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:

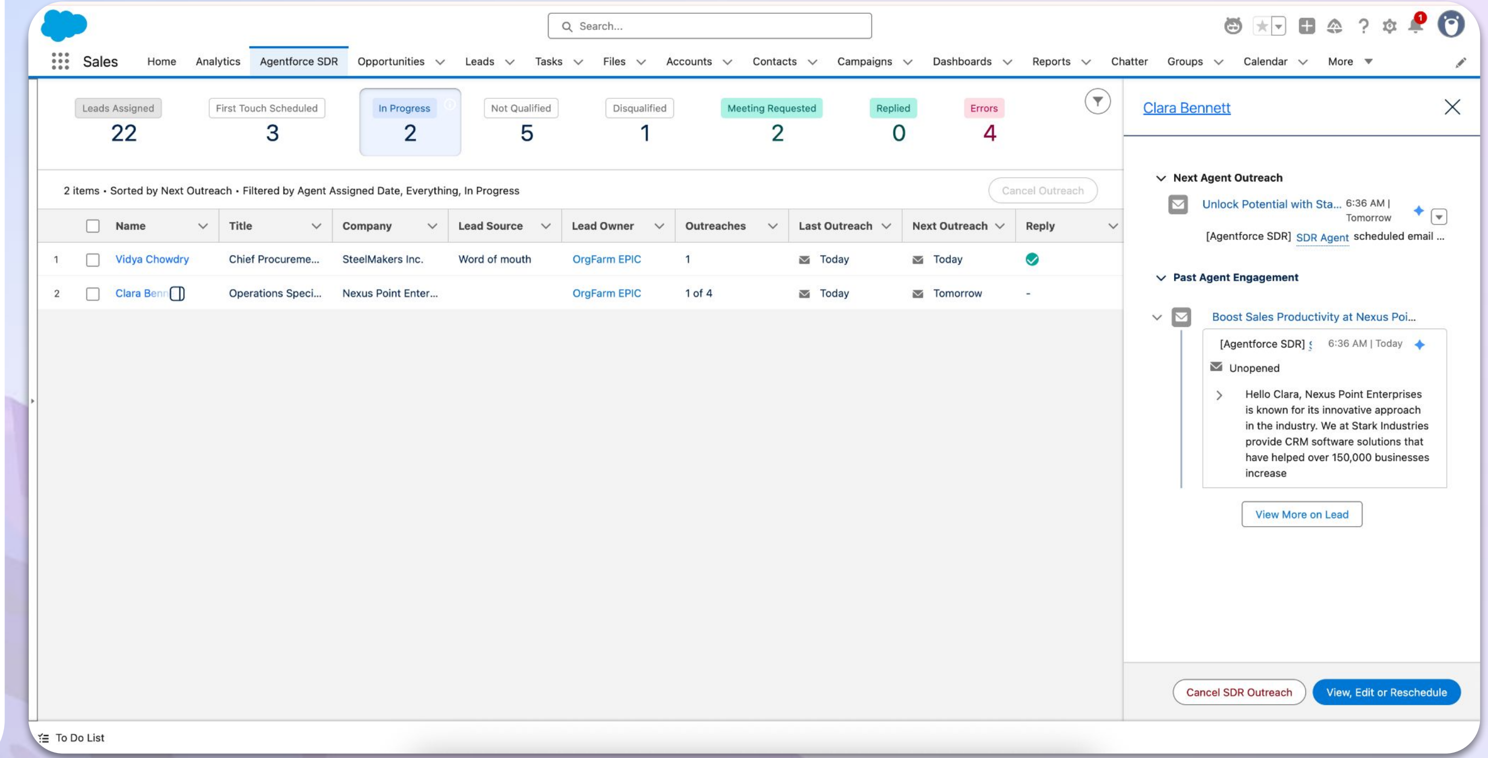
- Quality assurance
- ROI reporting
- Productivity tracking
- Capacity

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.



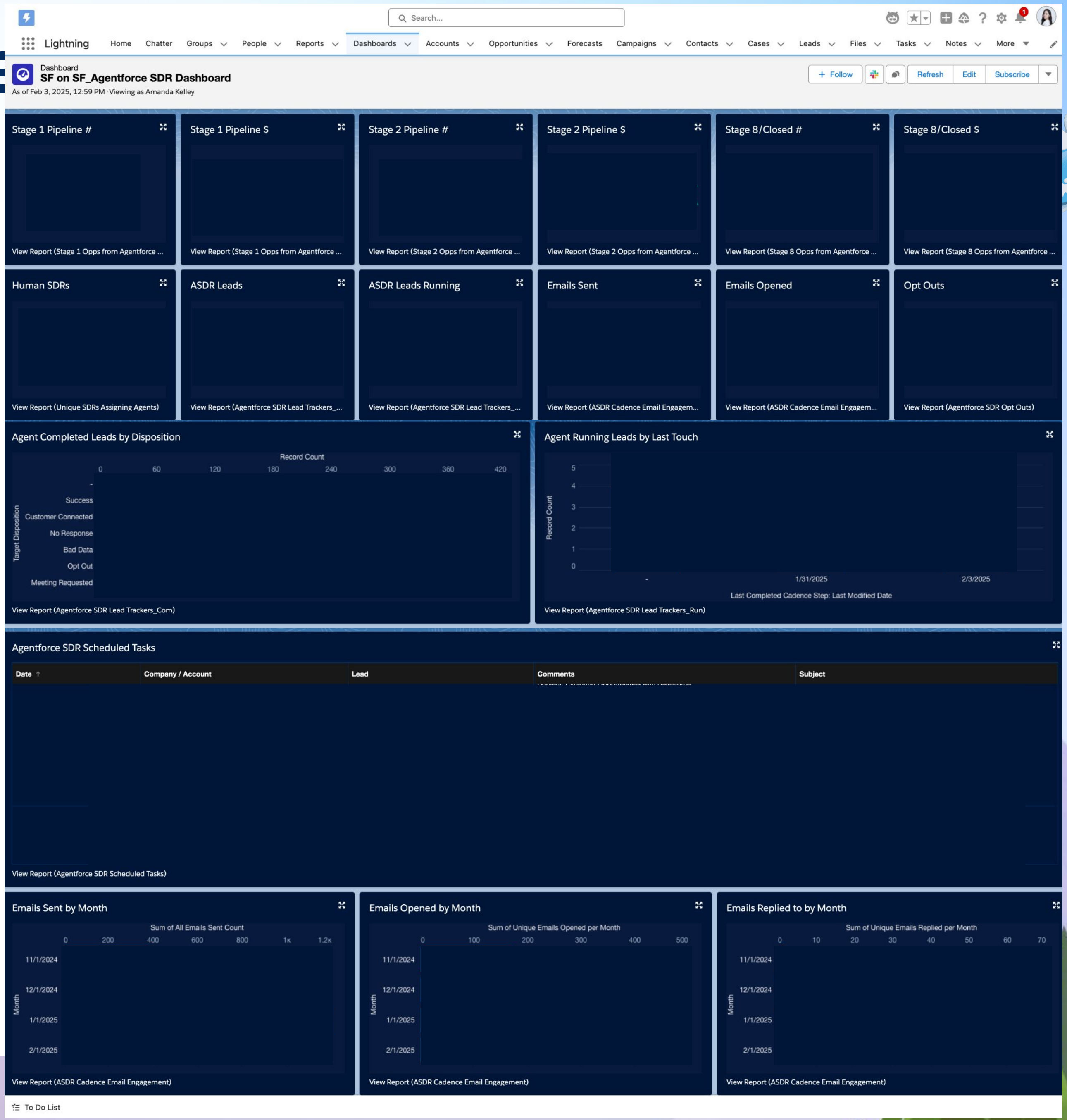
Agentforce for Sales Deve

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.



Source: [Guide to Creating ROI Reports]

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.

Source: Guide to Creating SDR Agent ROI Reports

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	• Cadence Assignee Full Name = [Agent User Record's Full Name]	• Lead Owner
Leads Currently Running	How many leads is the agent actively reaching out to right now?	Leads with Cadence Trackers	• Cadence Assignee Full Name = [Agent User Record's Full Name] • (Cadence) State = Running, Initializing, or Processing	• 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	• Cadence Assignee Full Name = [Agent User Record's Full Name]	• 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	• Cadence Id = [Record Id of Agentforce SDR - Initial Prospect Outreach cadence]	• 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

Source: Guide to Creating ROI Reports

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	• Cadence Assignee Full Name = [Agent User Record's Full Name] • Target Disposition = Opt Out	• Target Disposition
Total Meetings Requested	How many meetings were requested in response to an agent's email?	Leads with Cadence Trackers	• Cadence Assignee Full Name = [Agent User Record's Full Name] • Target Disposition = Meeting Requested	• 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	• Cadence Assignee Full Name = [Agent User Record's Full Name] • (Lead) Converted = True	• Target Disposition • State • Converted Opportunity: Amount • Converted Opportunity: Name
Agent-Scheduled Emails	What is the content of agent-generated emails that are currently scheduled to be sent later?	Tasks and Events	• (Task) Assigned = [Agent User Record's Full Name] • Status = In Progress	• Date • Comments
Bounced Emails	How to find if there is a bounce for a given email for a lead?	Leads with Cadence Trackers	• Target Disposition = Bad Data	• Target Disposition

Source: [Guide to Creating ROI Reports]

Agentforce

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 be customizable, but the product team is looking to make the 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

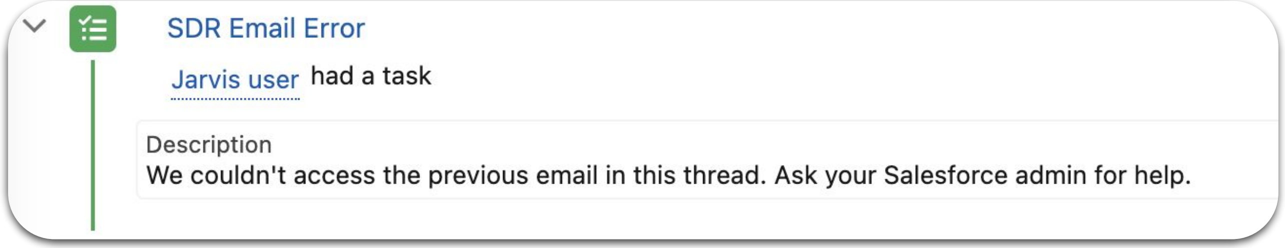
Email Errors - Common Reasons

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

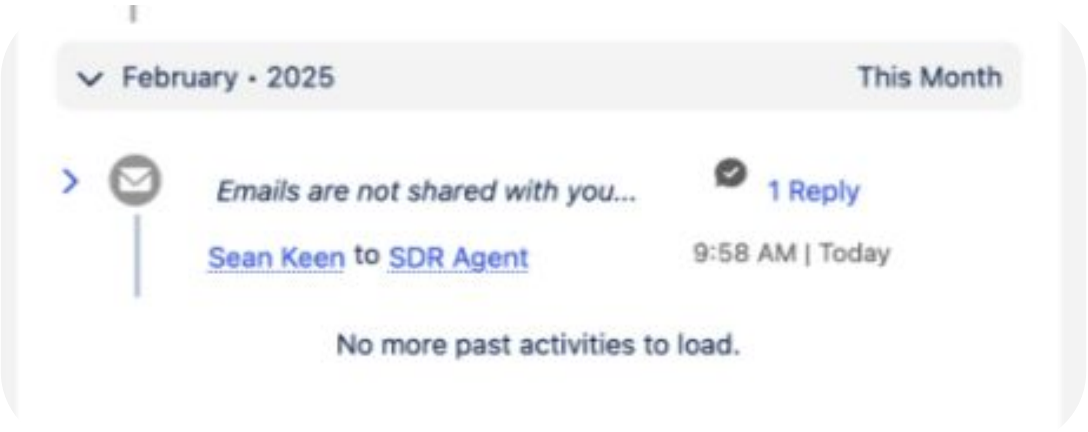


Agentforce for Sales Development

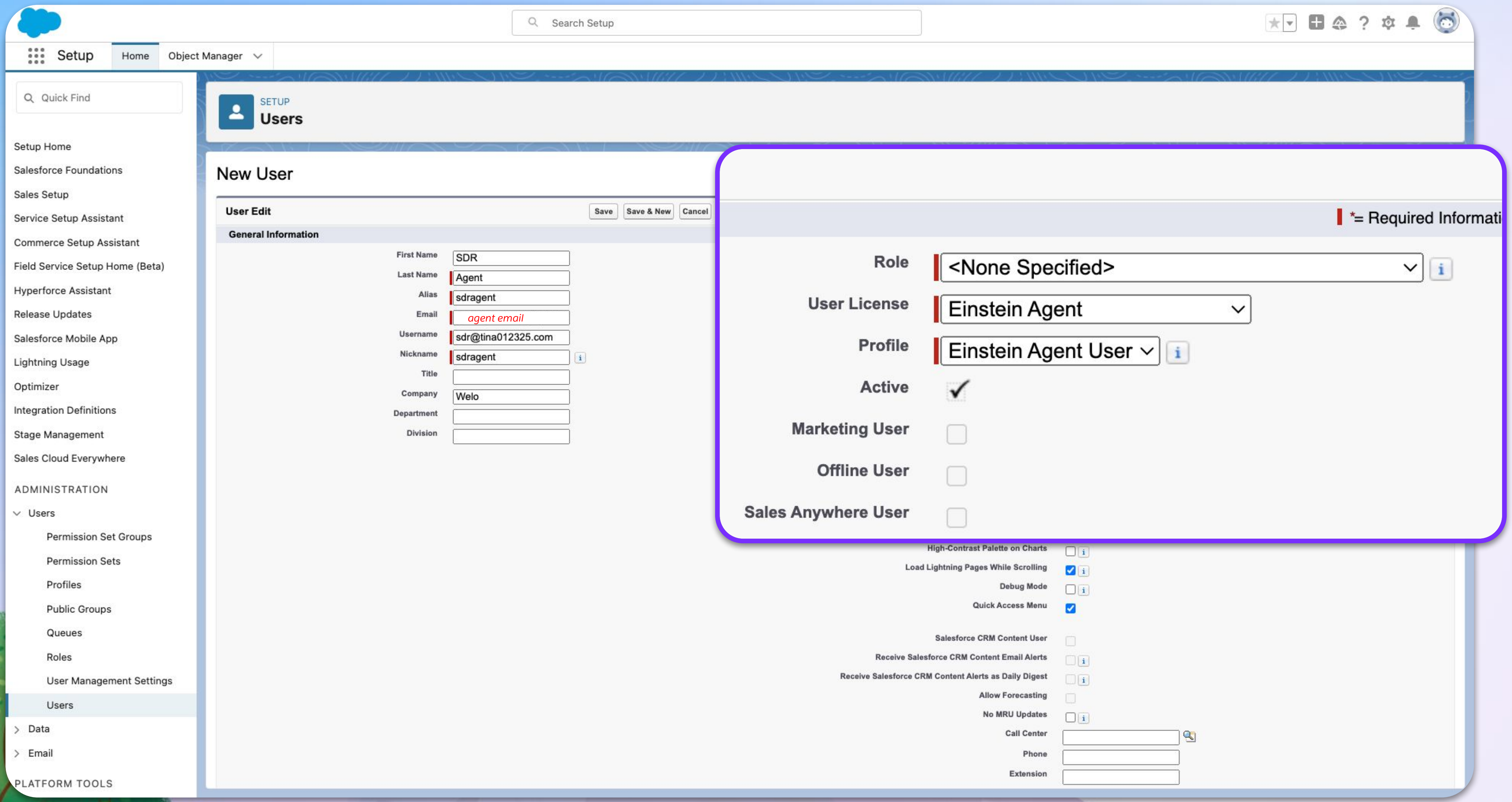
Email Errors - Common Reasons

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



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.

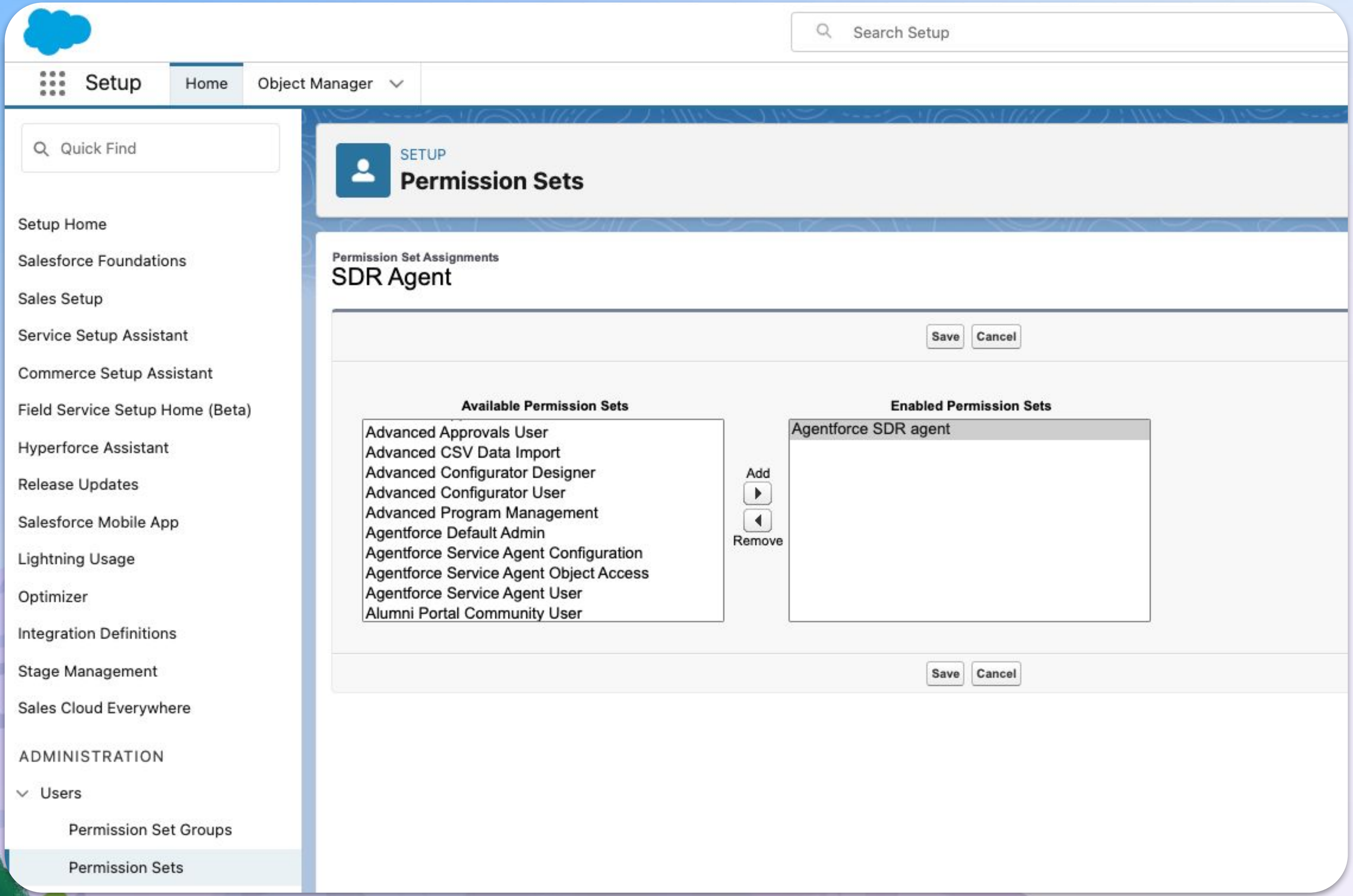
In Professional, Enterprise, Unlimited, Performance, and Developer Editions, select a **Role**. Other editions don't require a role.

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.

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

Manual Creation of Agent User Record



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.**

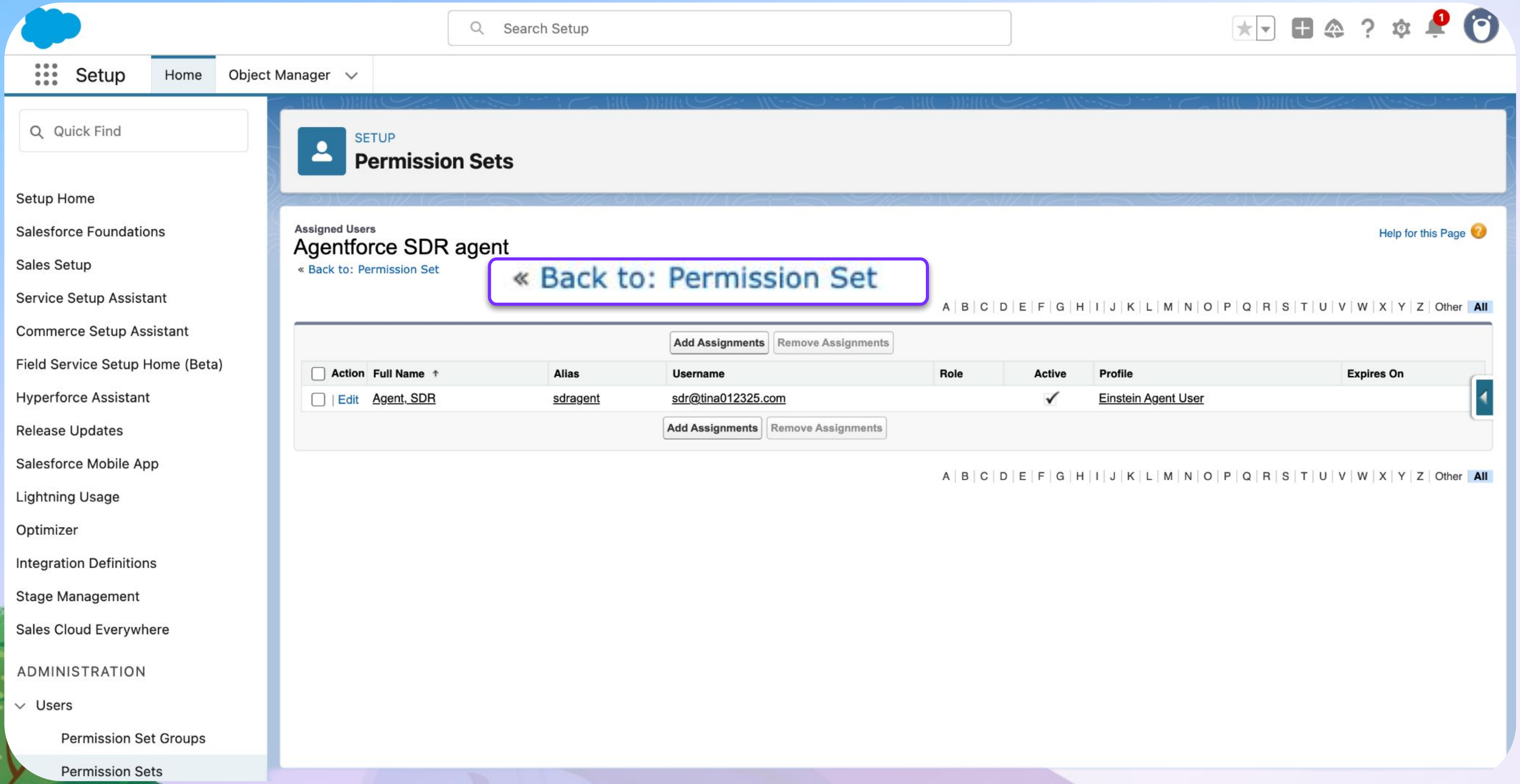
Click Add Assignments.

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

Assign the Agentforce SDR Agent permission. Save your changes.

[Salesforce Help: Create an SDR Agent User Record]

Manual Creation of Agent User Record



Make sure your agent has access to the default Data Space

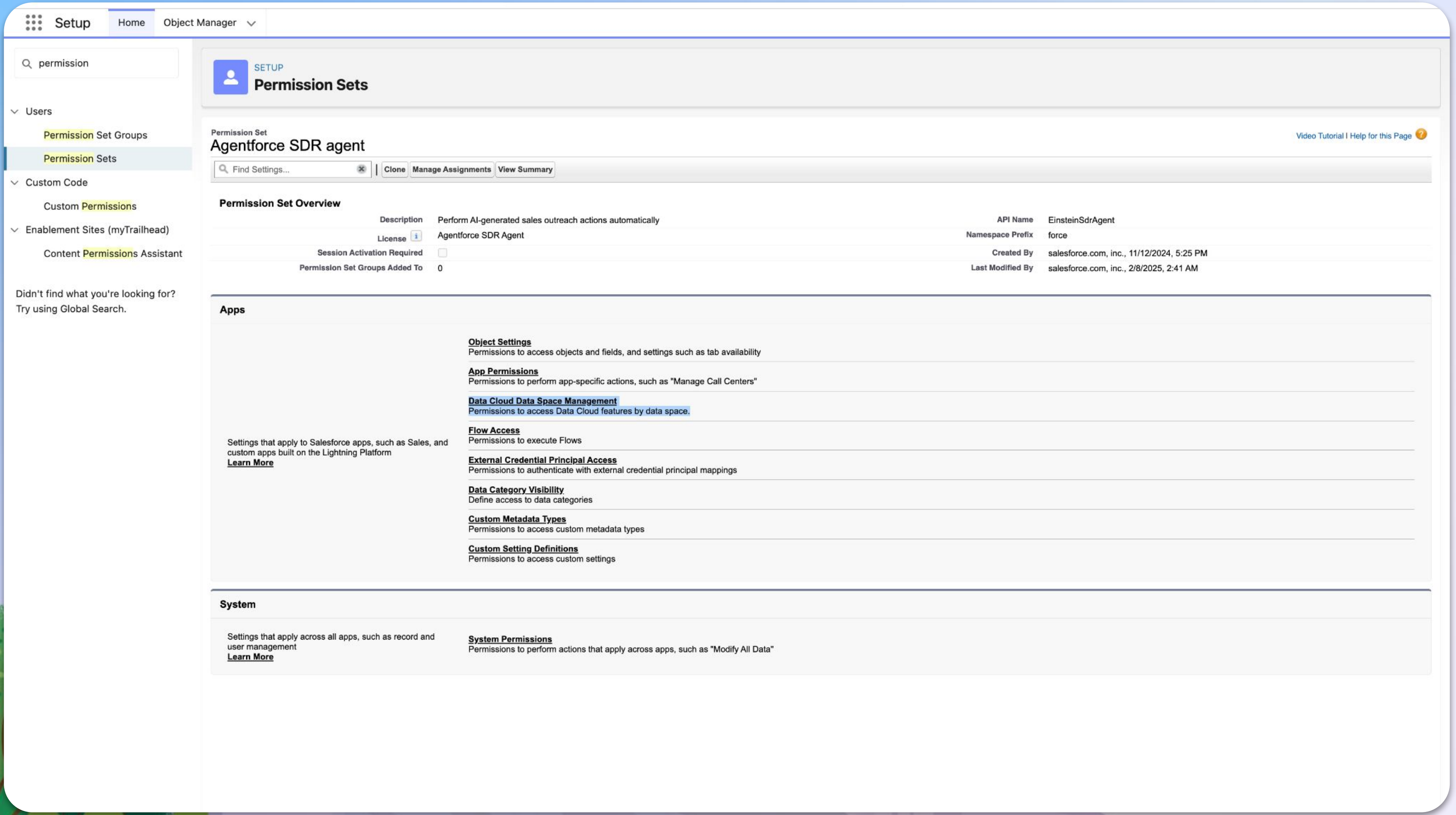
Click "Back to: Permission Set" on the Agentforce SDR Agent permission set

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

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

[Guide: Setup & Troubleshoot Agentforce Data Libraries & Answer Questions with Knowledge]()

Manual Creation of Agent User Record



Make sure your agent has access to the default Data Space

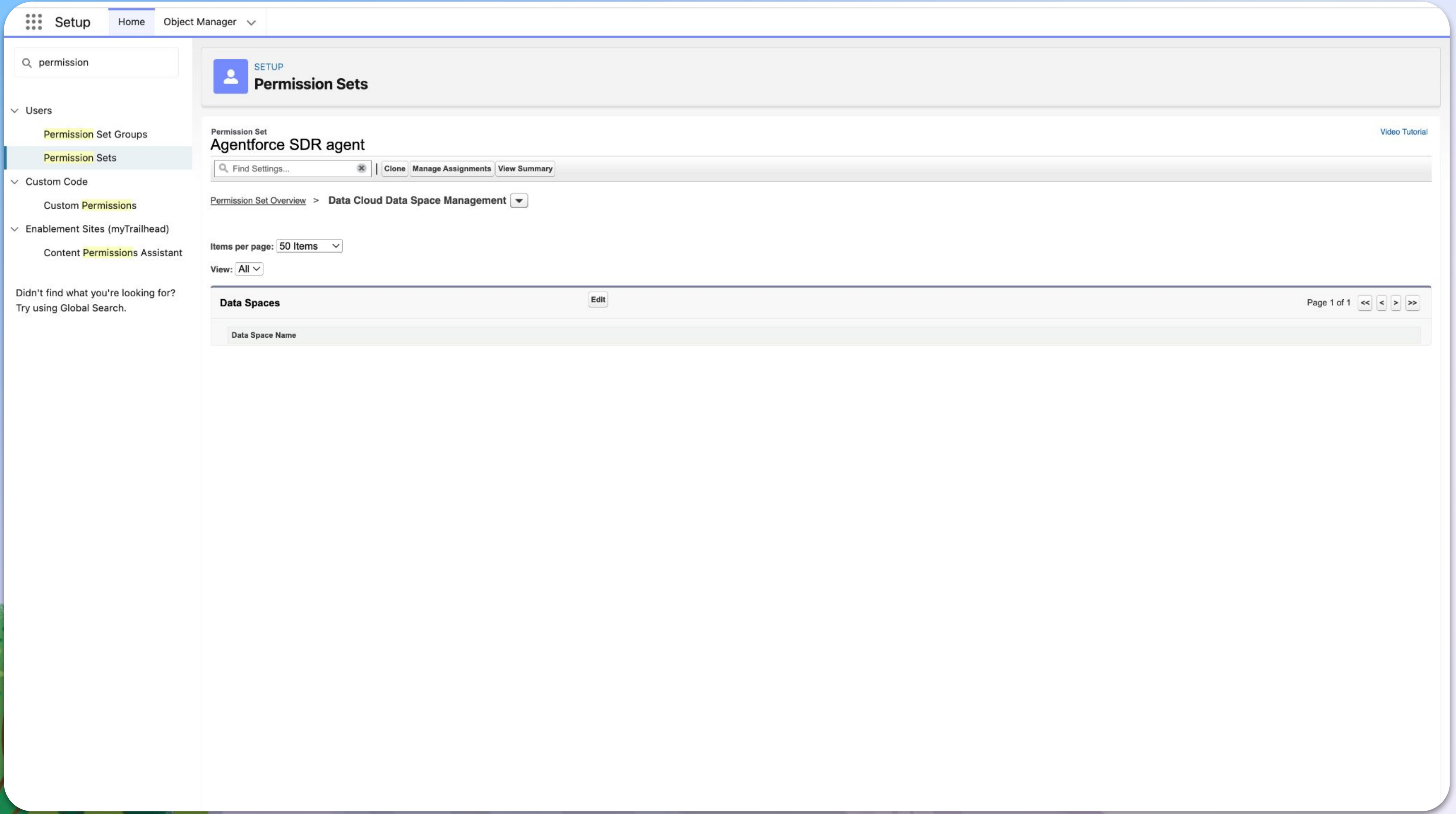
Select Data Cloud Data Space Management

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



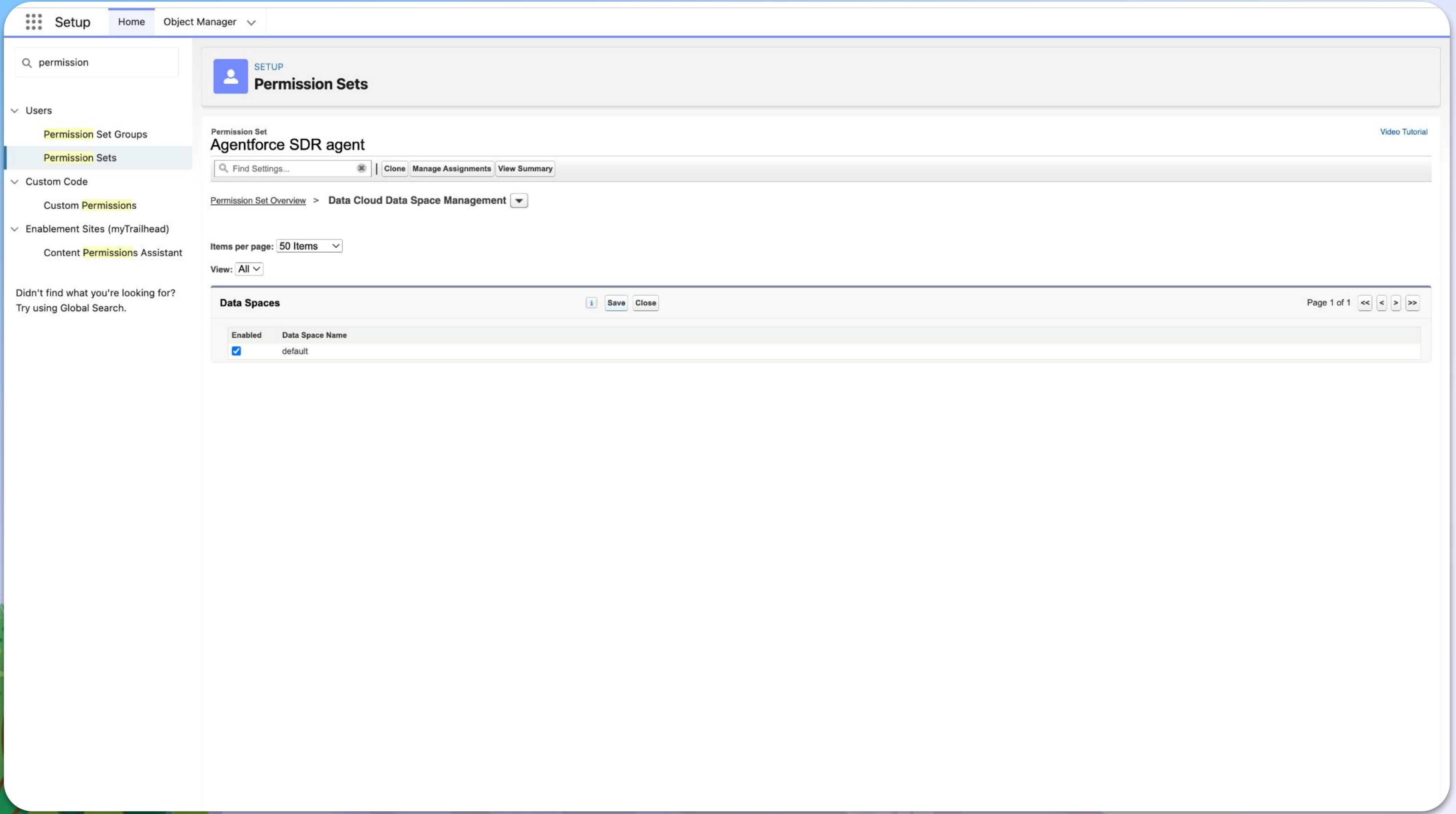
Make sure your agent has access to the default Data Space

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]

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

Manual Creation of Agent User Record



Make sure your agent has access to the default Data Space

Select the checkbox under "default" of the Data Space.

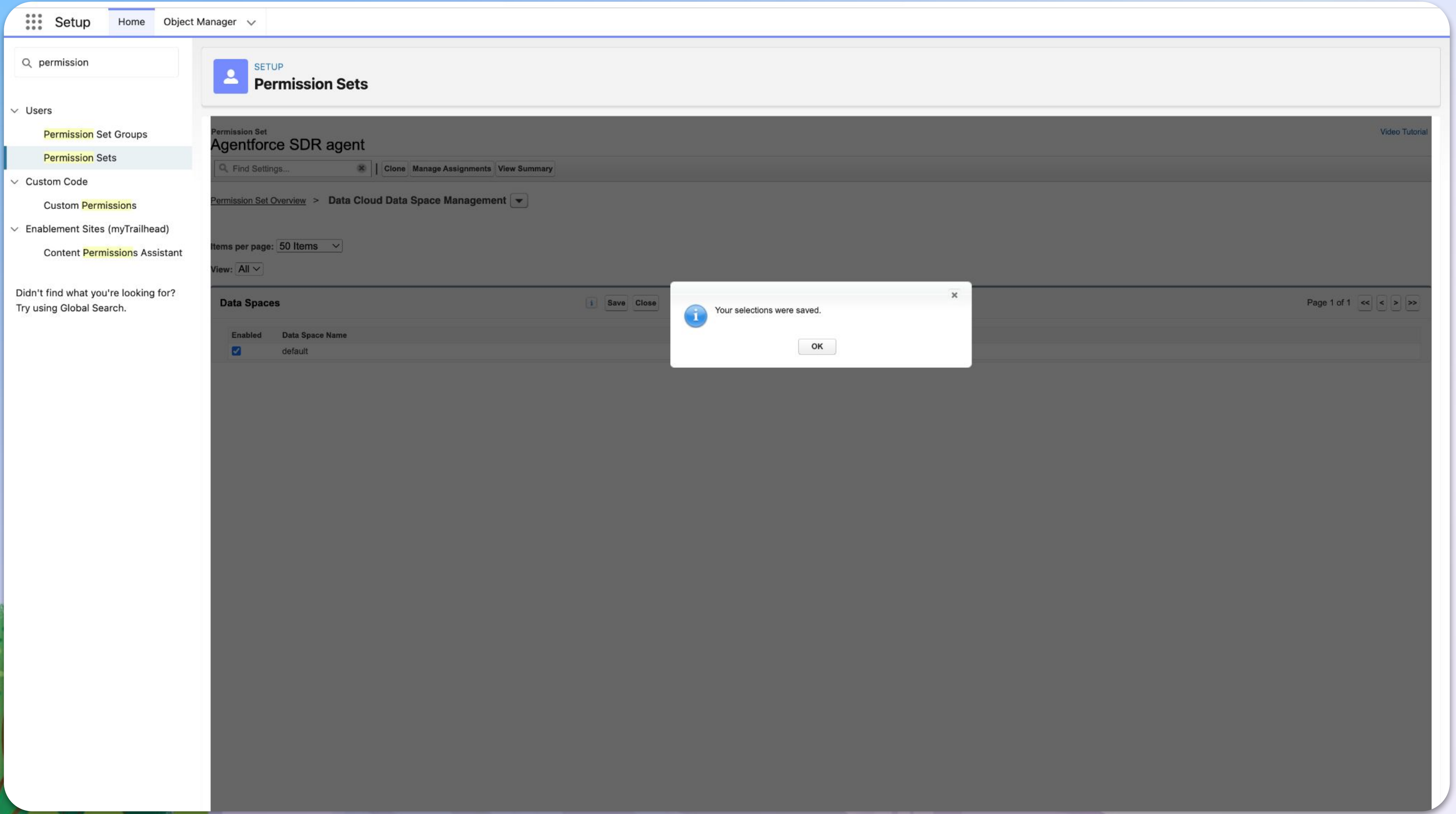
Now press Save.

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

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

[Guide: Setup & Troubleshoot Agentforce Data Libraries & Answer Questions with Knowledge](#)

Manual Creation of Agent User Record



Make sure your agent has access to the default Data Space

Confirm your selections were saved.

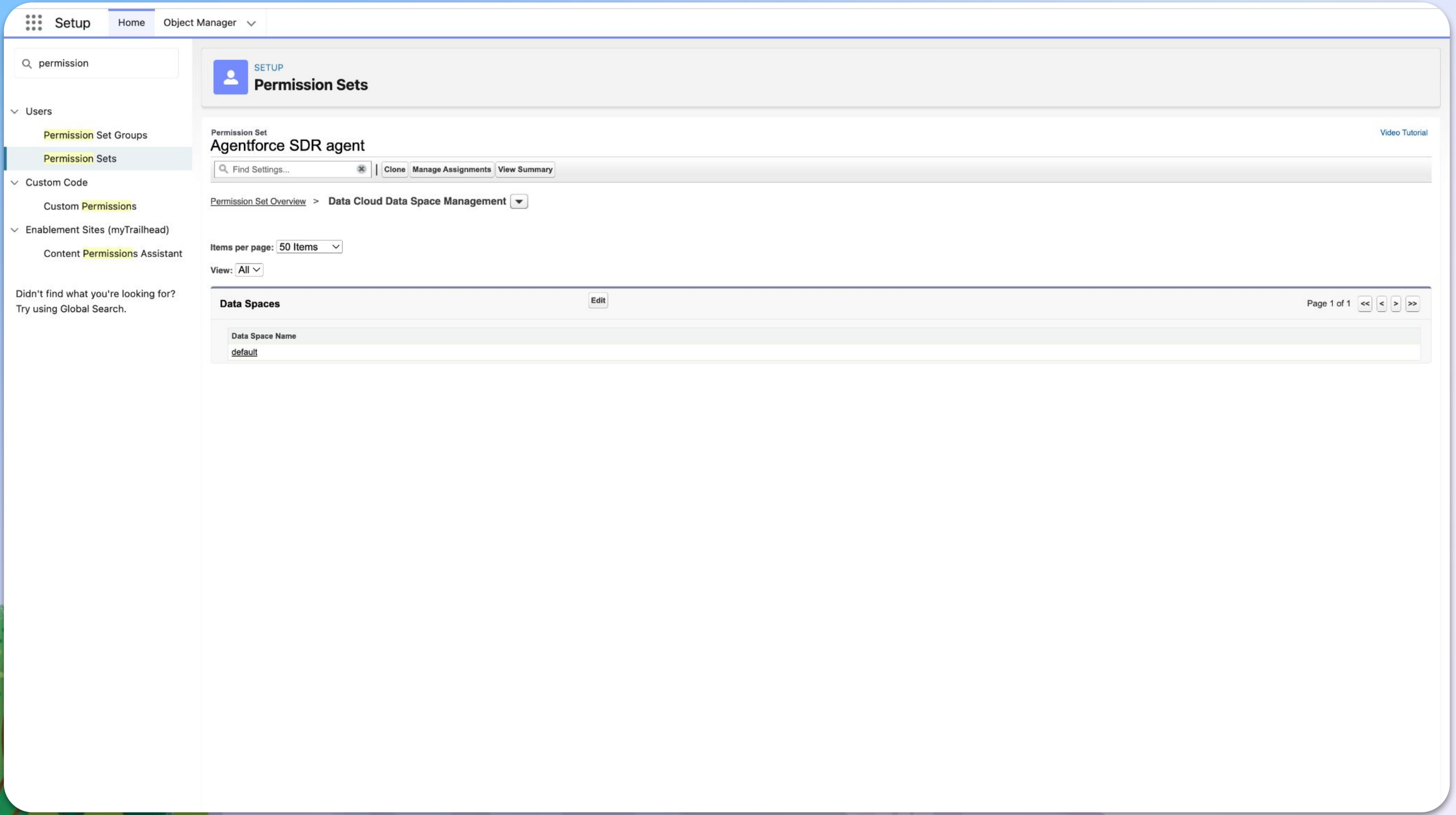
Find more detailed information on setting up and troubleshooting Data Libraries [here]

[Salesforce Help: Create an SDR Agent User Record]

[Guide: Setup & Troubleshoot Agentforce Data Libraries & Answer Questions with Knowledge]

[Salesforce Help: Create an SDR Agent User Record]

Manual Creation of Agent User Record



Make sure your agent has access to the default Data Space

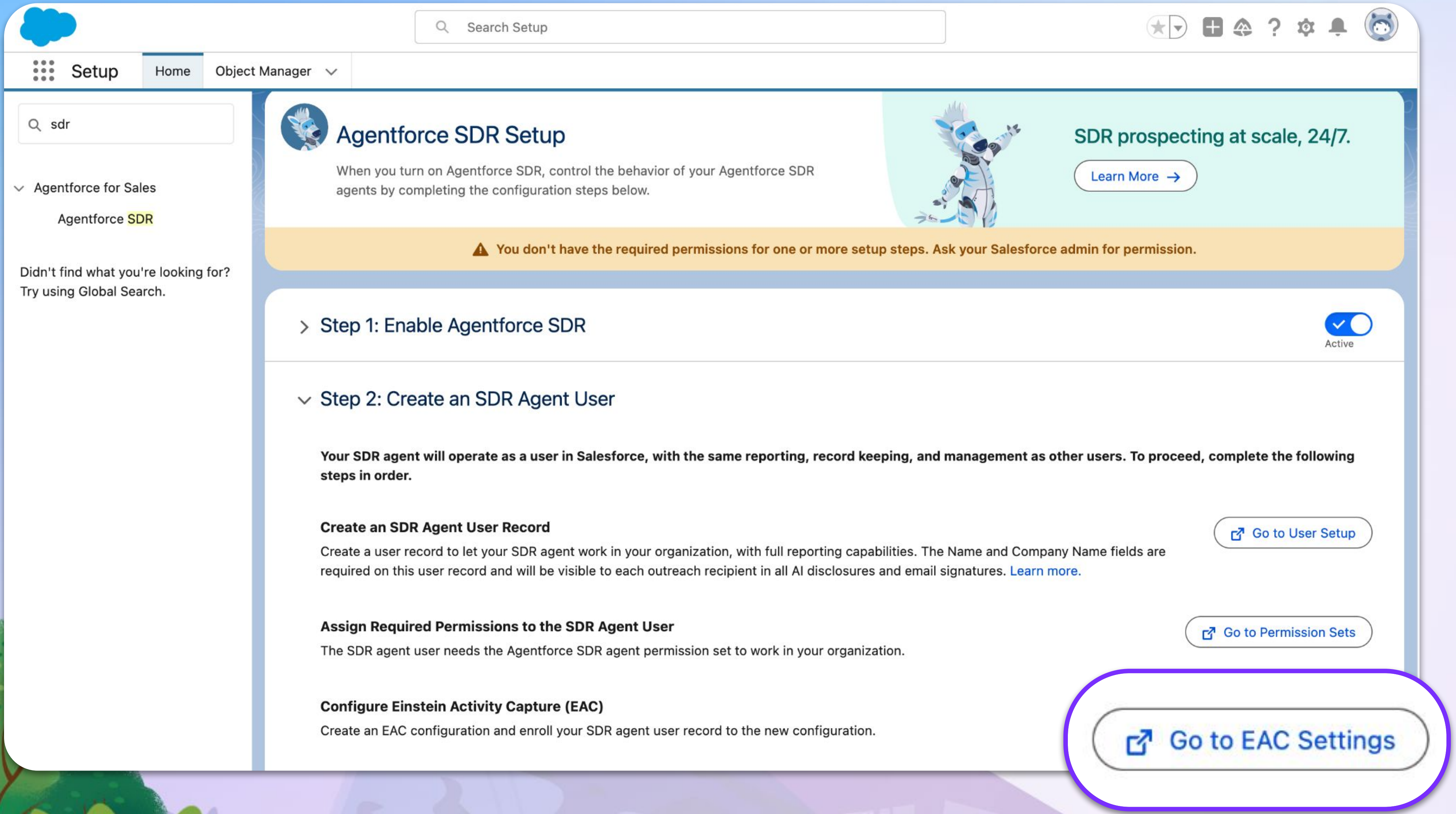
Now when you go to Agentforce SDR Agent Permission Set, you can see that “default” is listed under Data Space and this step is successful.

Find more detailed information on setting up and troubleshooting Data Libraries here

Salesforce Help: Create an SDR Agent User Record

Guide: Setup & Troubleshoot Agentforce Data Libraries & Answer Questions with Knowledge

Manual Creation of Agent User Record



Add the SDR Agent to Einstein Activity Capture

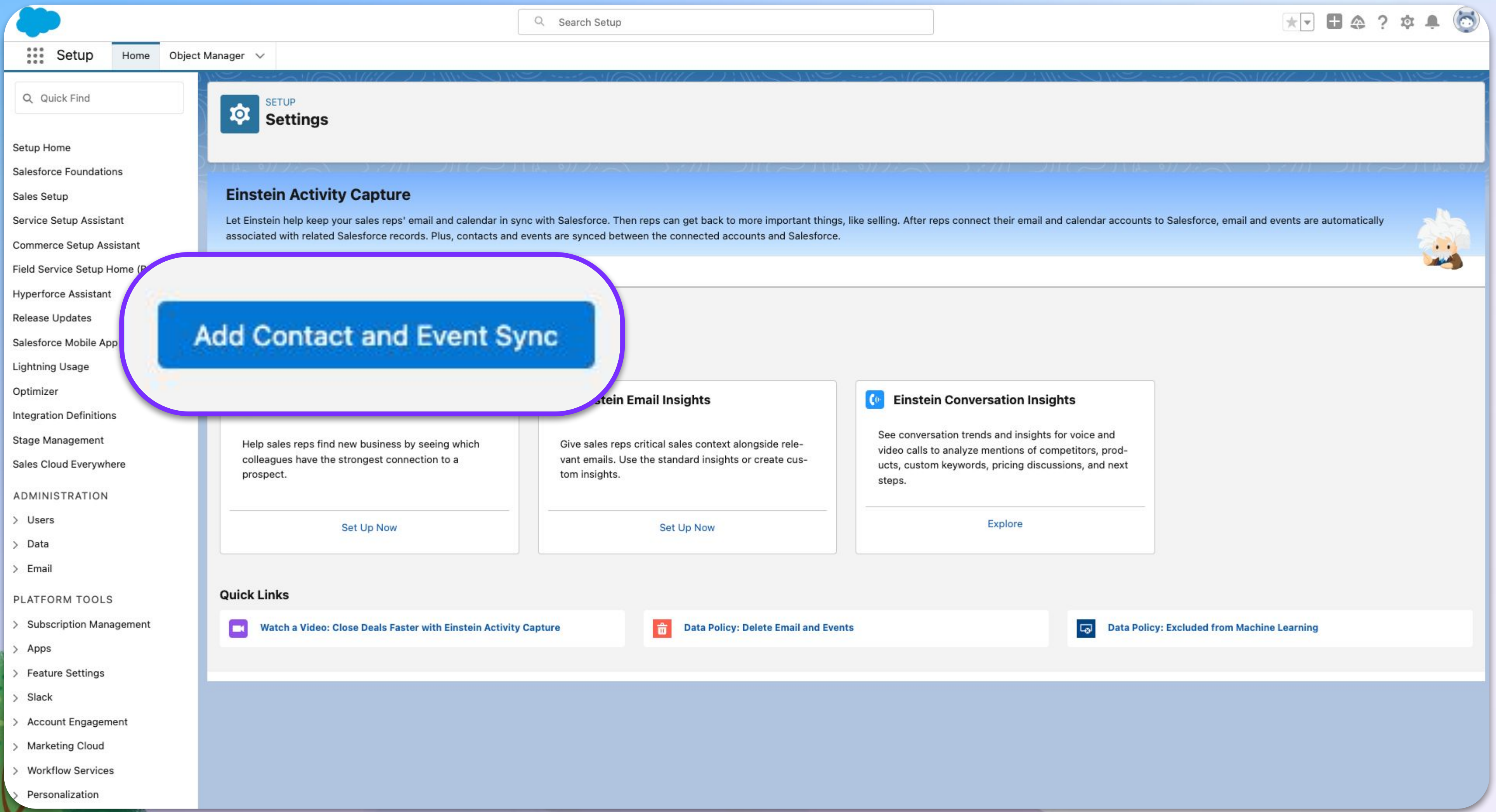
EAC lets your agent access its inbox using your email application and ensures its emails are captured in Salesforce. This gives you direct visibility into all of your agent's activities. The agent uses EAC when generating outreach and reply emails.

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

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

Salesforce Help: Create an SDR Agent User Record

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.

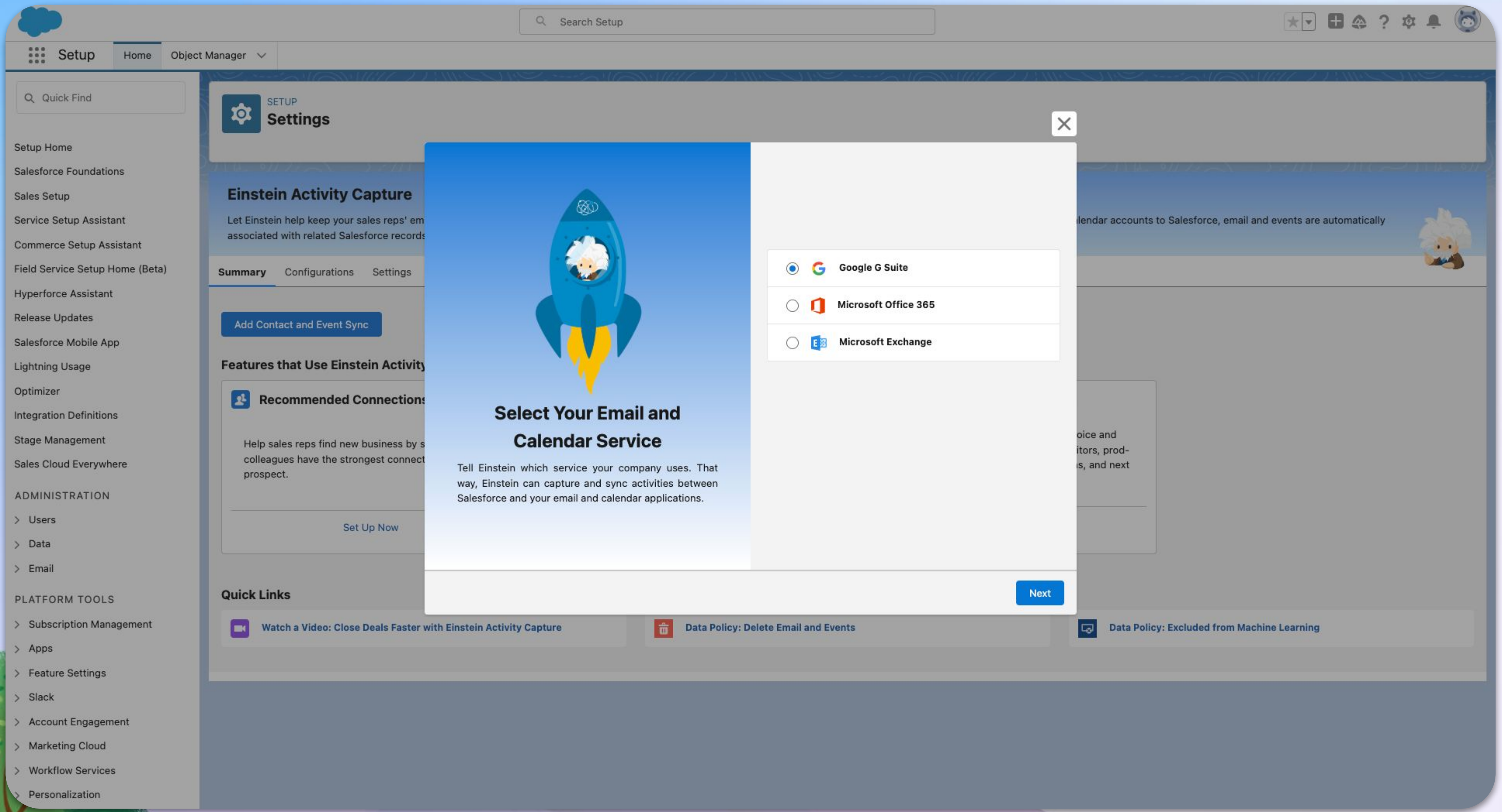
Enter a name for this new EAC configuration, and click Next.

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

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

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.**

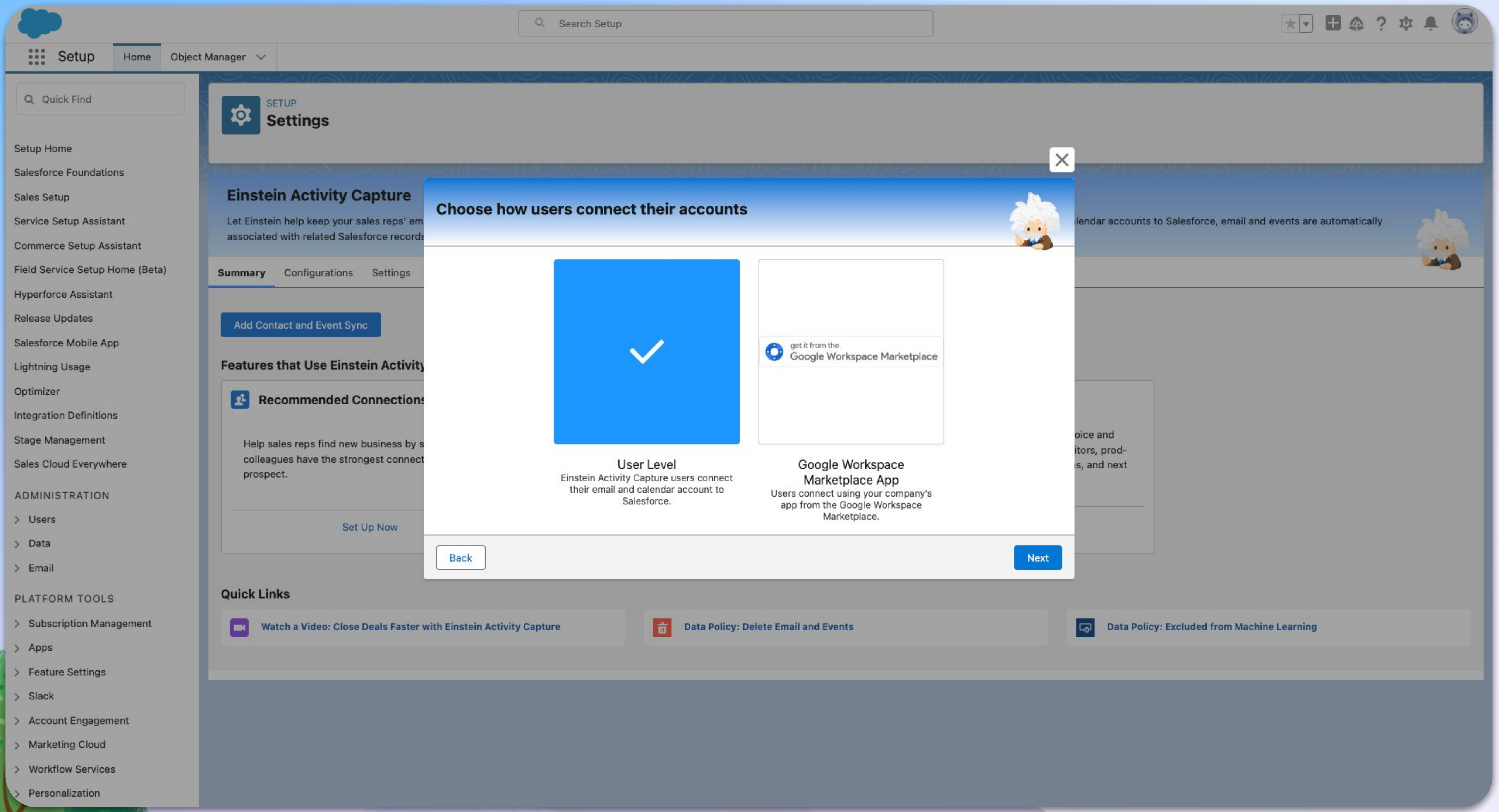
Select your **Email and Calendar** service and select the user connection preference.

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

Verify all the settings and edit if needed.

Salesforce Help: Create an SDR Agent User Record

Manual Creation of Agent User Record



Add the SDR Agent to Einstein Activity Capture

Select the user connection preference.

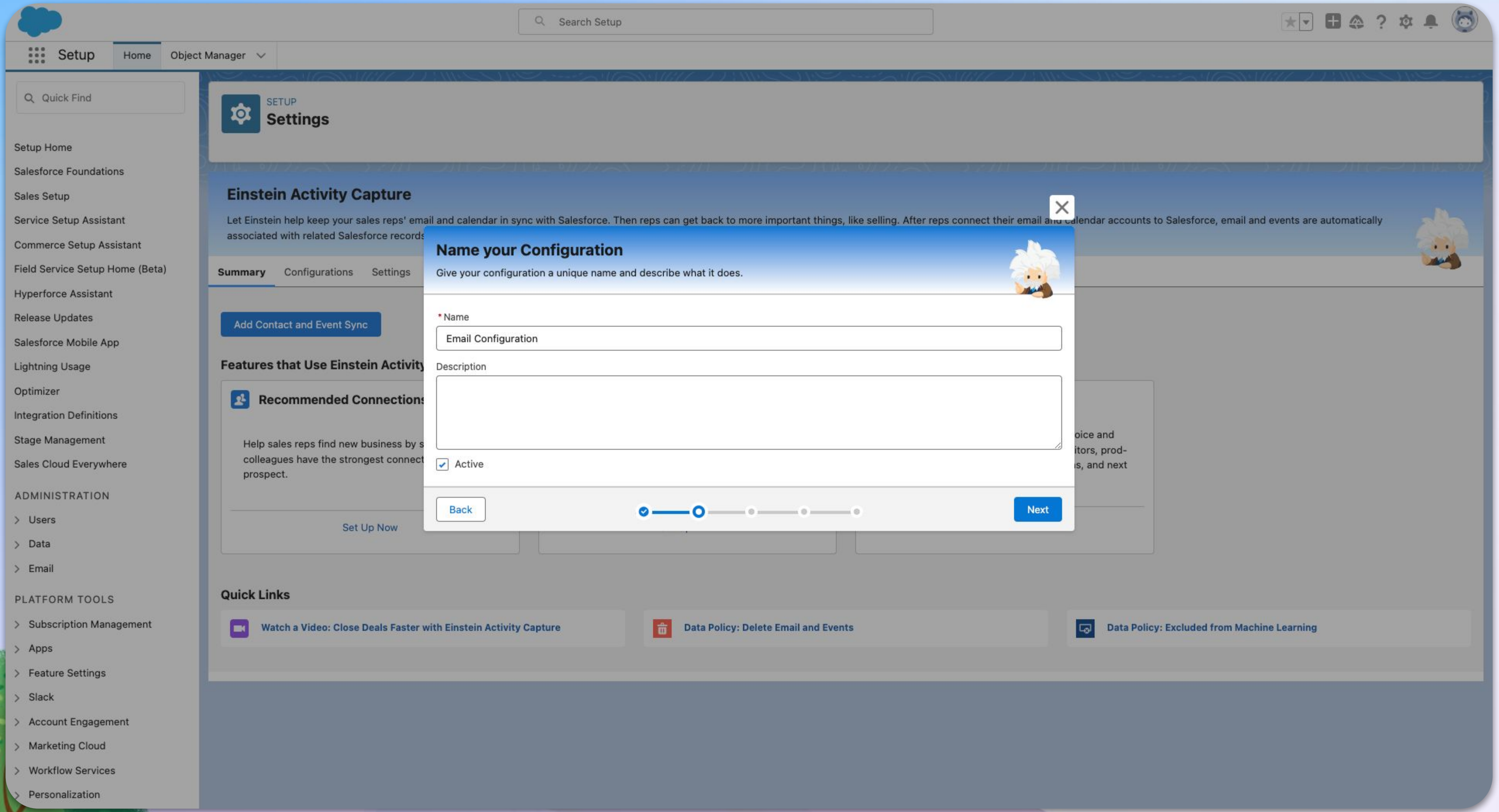
Enter a name for your EAC configuration, and click Next.

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.

[Salesforce Help: Create an SDR Agent User Record]

Manual Creation of Agent User Record



Add the SDR Agent to Einstein Activity Capture

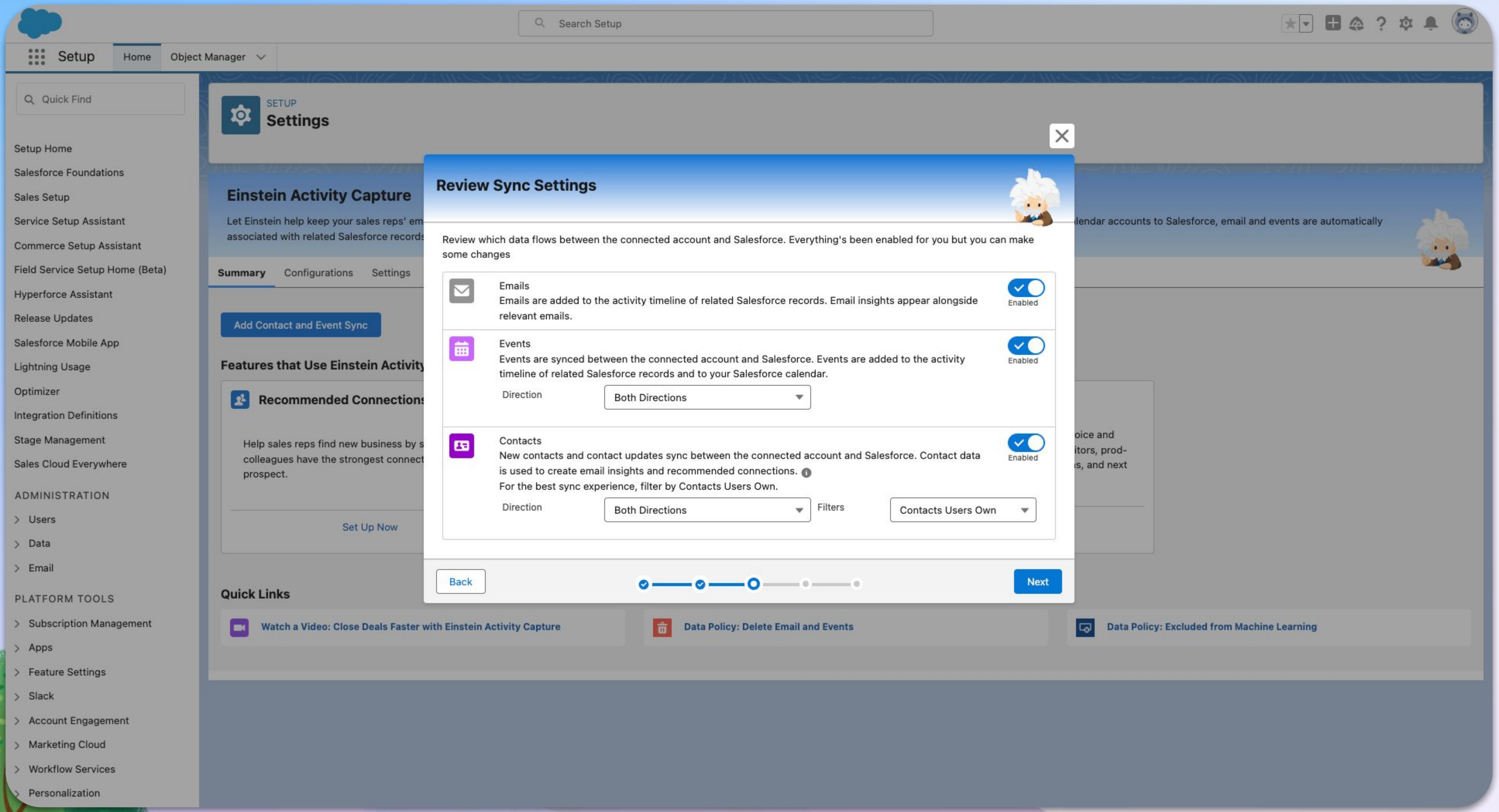
Enter a name and optional description for your EAC configuration, and click Next.

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

[Salesforce Help: Create an SDR Agent User Record]

Manual Creation of Agent User Record



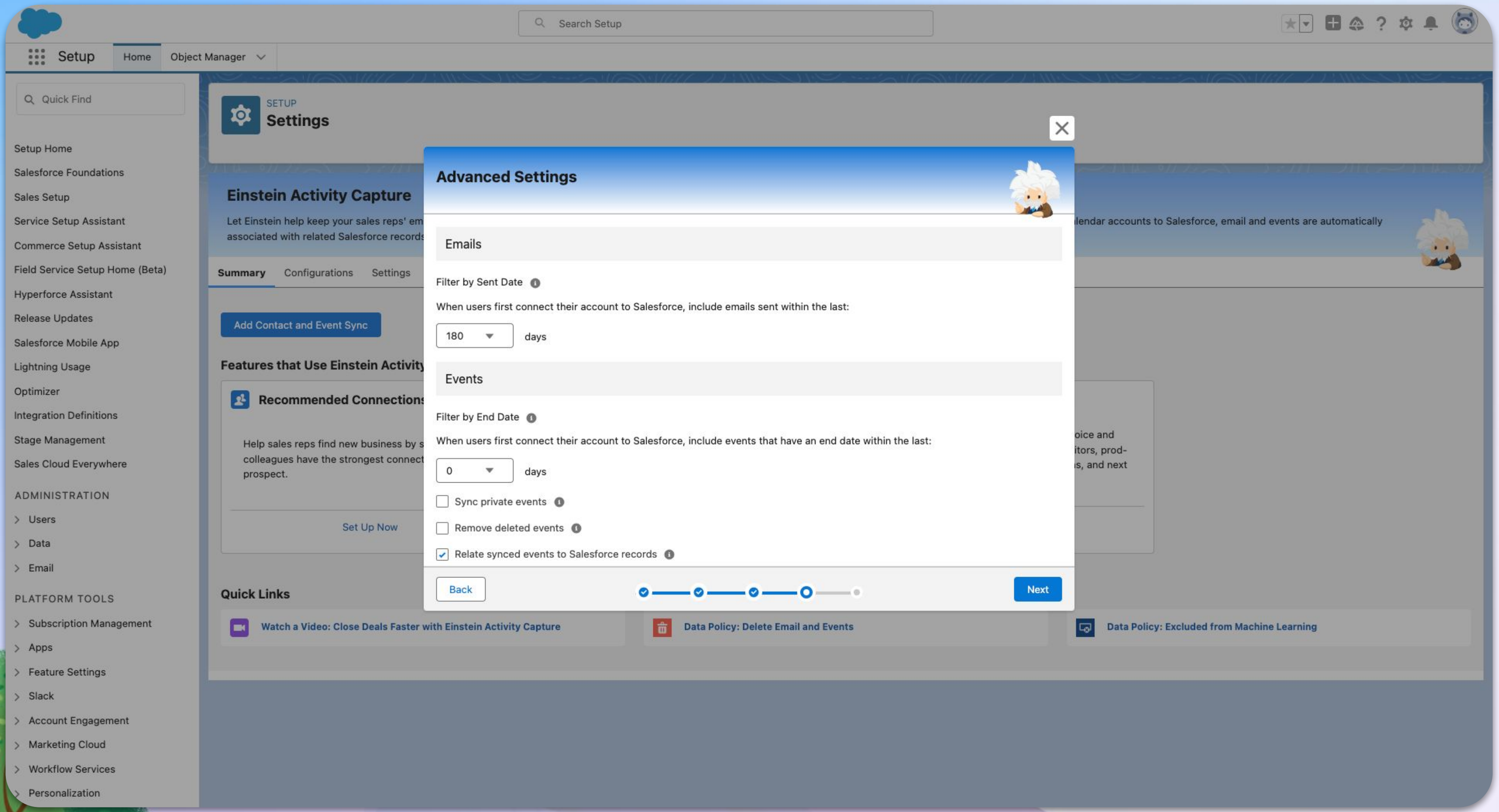
Add the SDR Agent to Einstein Activity Capture

Verify all the settings and edit if needed. 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

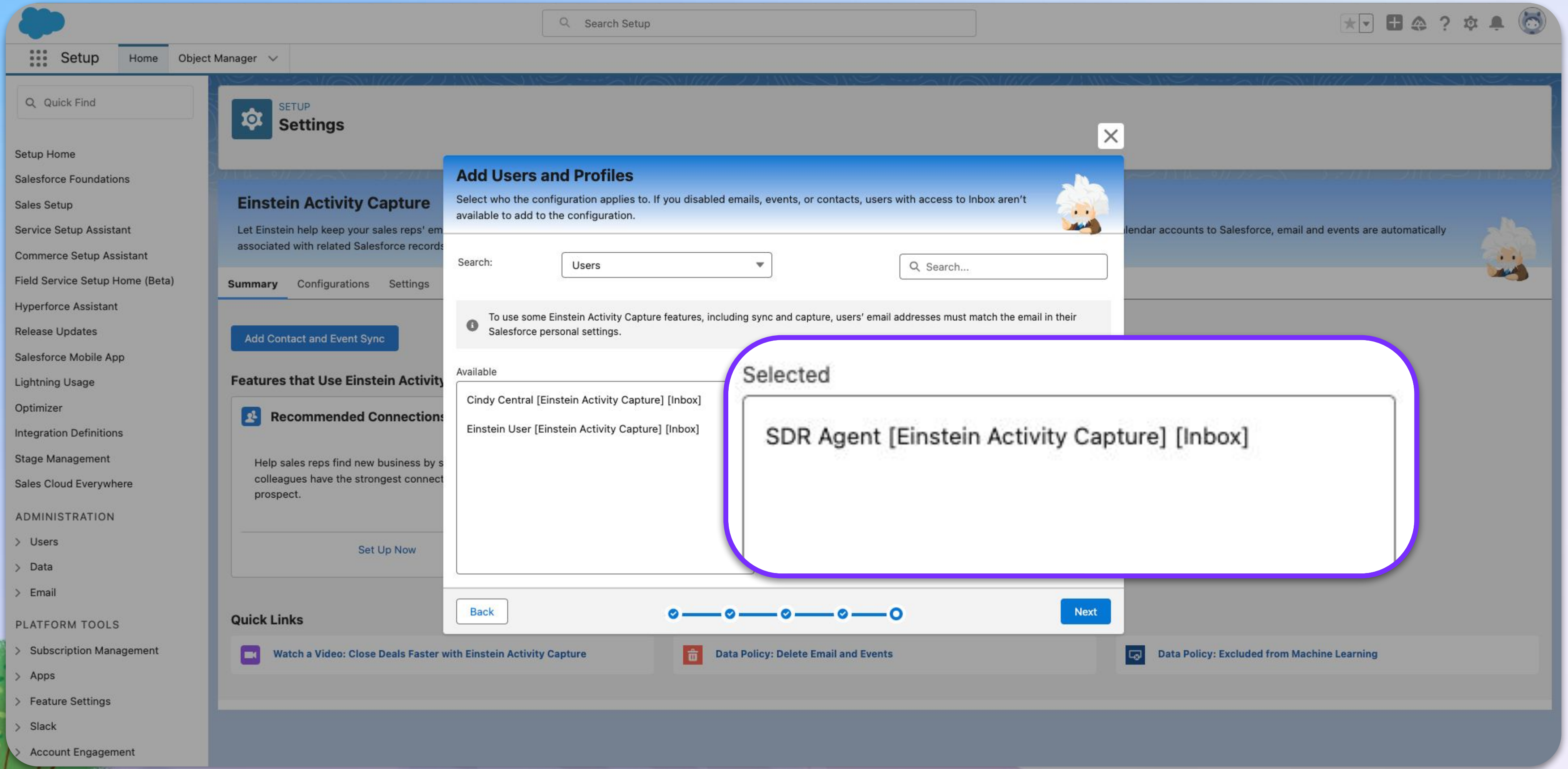
Verify all the settings and edit if needed.

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



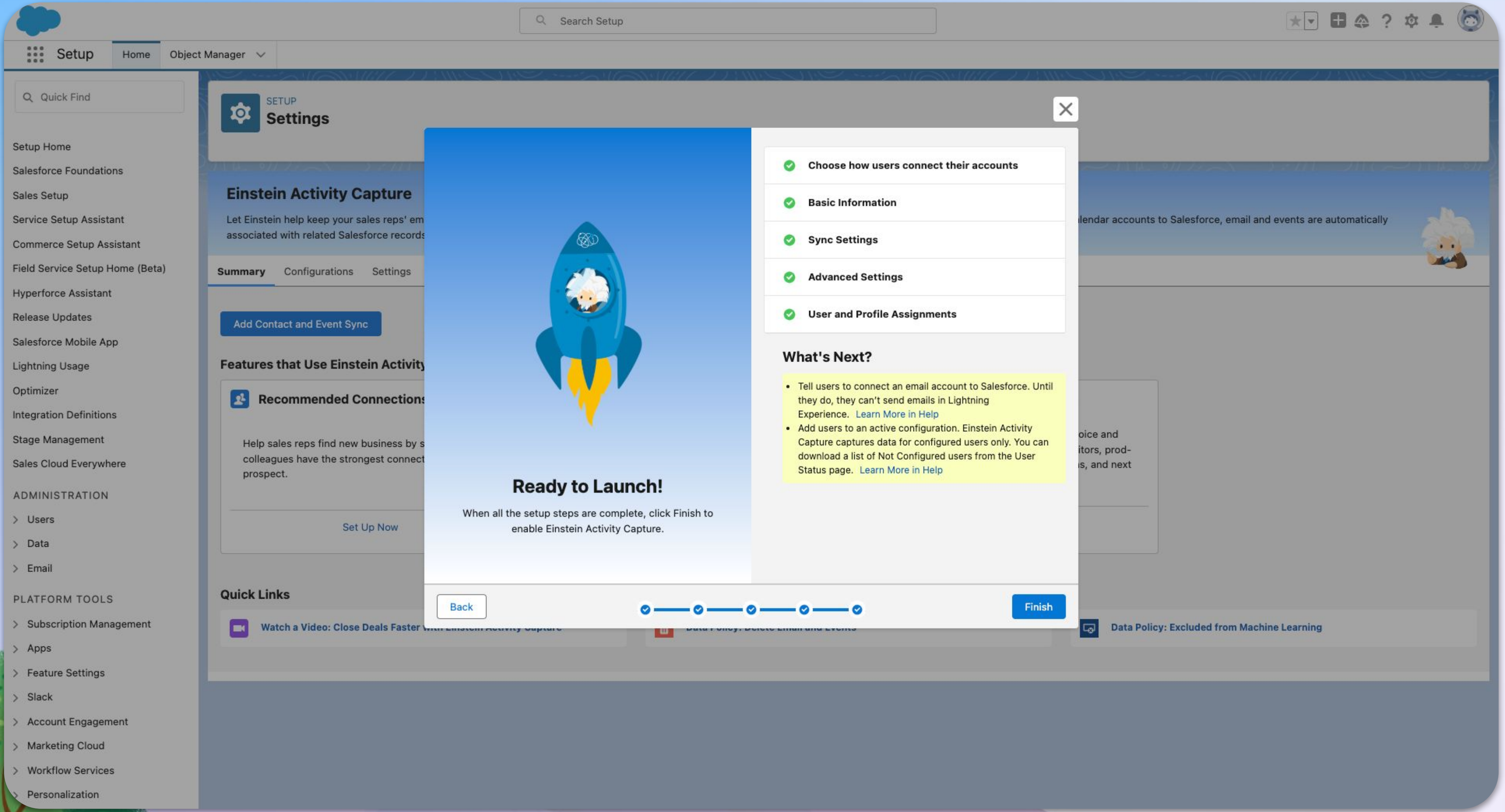
Add the SDR Agent to Einstein Activity Capture

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.

[Salesforce Help: Create an SDR Agent User Record]

Manual Creation of Agent User Record



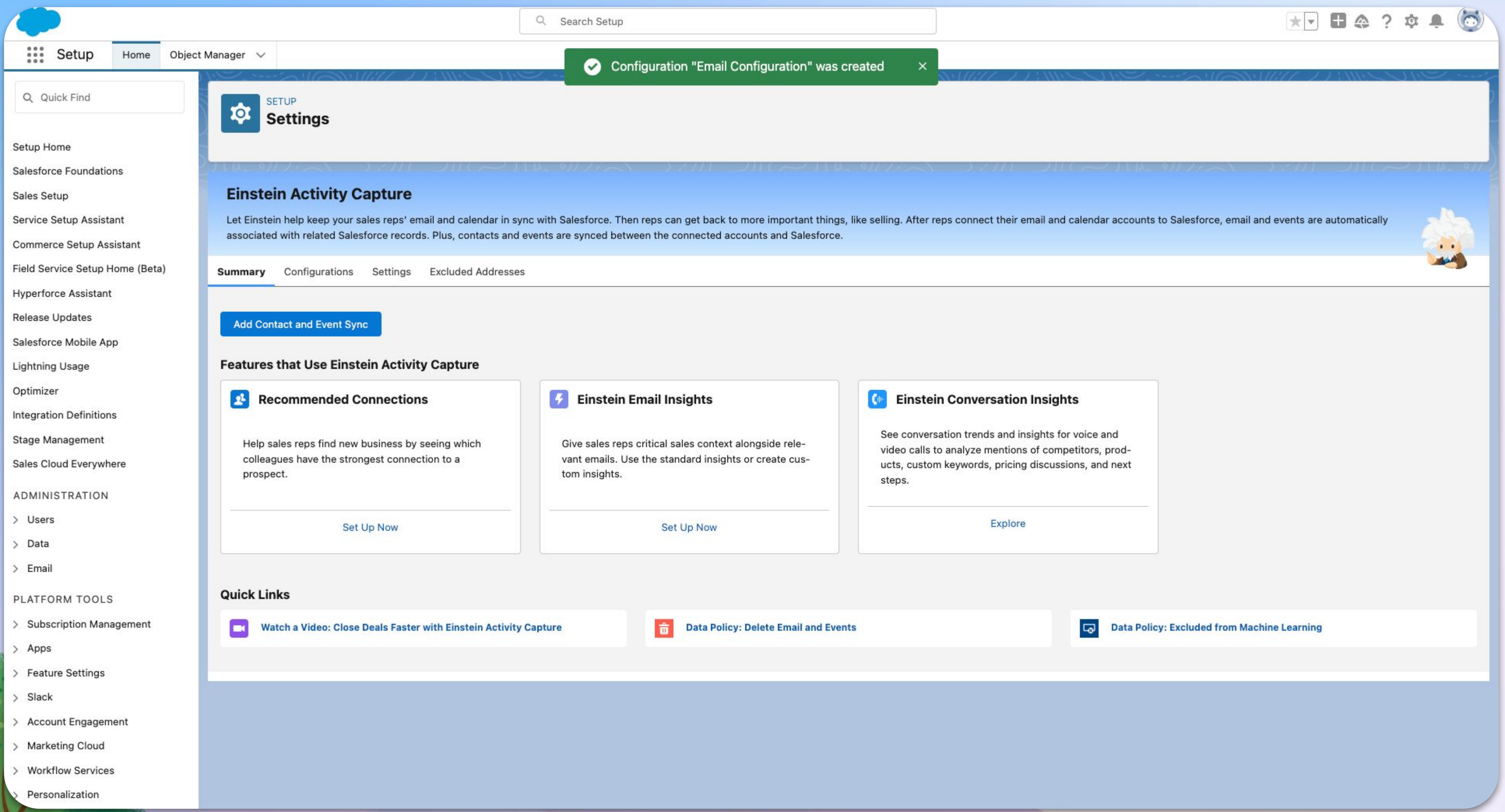
Add the SDR Agent to Einstein Activity Capture

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

Click **Finish**.

Salesforce Help: Create an SDR Agent User Record

Manual Creation of Agent User Record



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.

[Salesforce Help: Create an SDR Agent User Record]

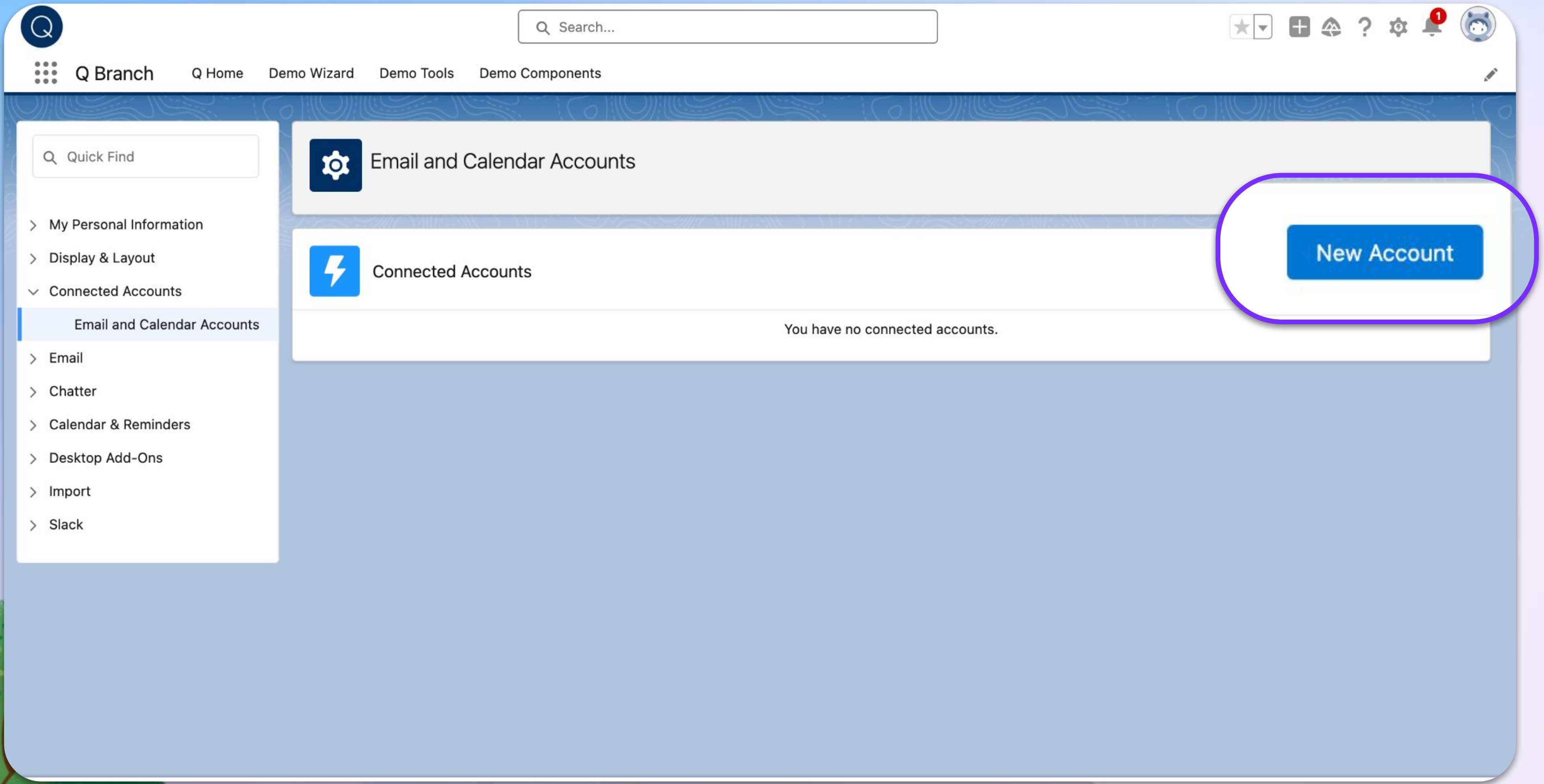
Agentforce for Sales Development Permissions

SDR Agent Permissions Set Help

	Permission Set(s)	Description
SDR Agent User	• Agentforce SDR Agent	Allows the SDR Agent [user record] to reach out to prospects automatically with full reporting capabilities
Sales Manager / Admin	• Configure Agentforce SDR Agent • Sales Engagement Cadence Creator • Automated Actions User • Data 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	• Use Agentforce SDR Agent • Sales Engagement User • Automated 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



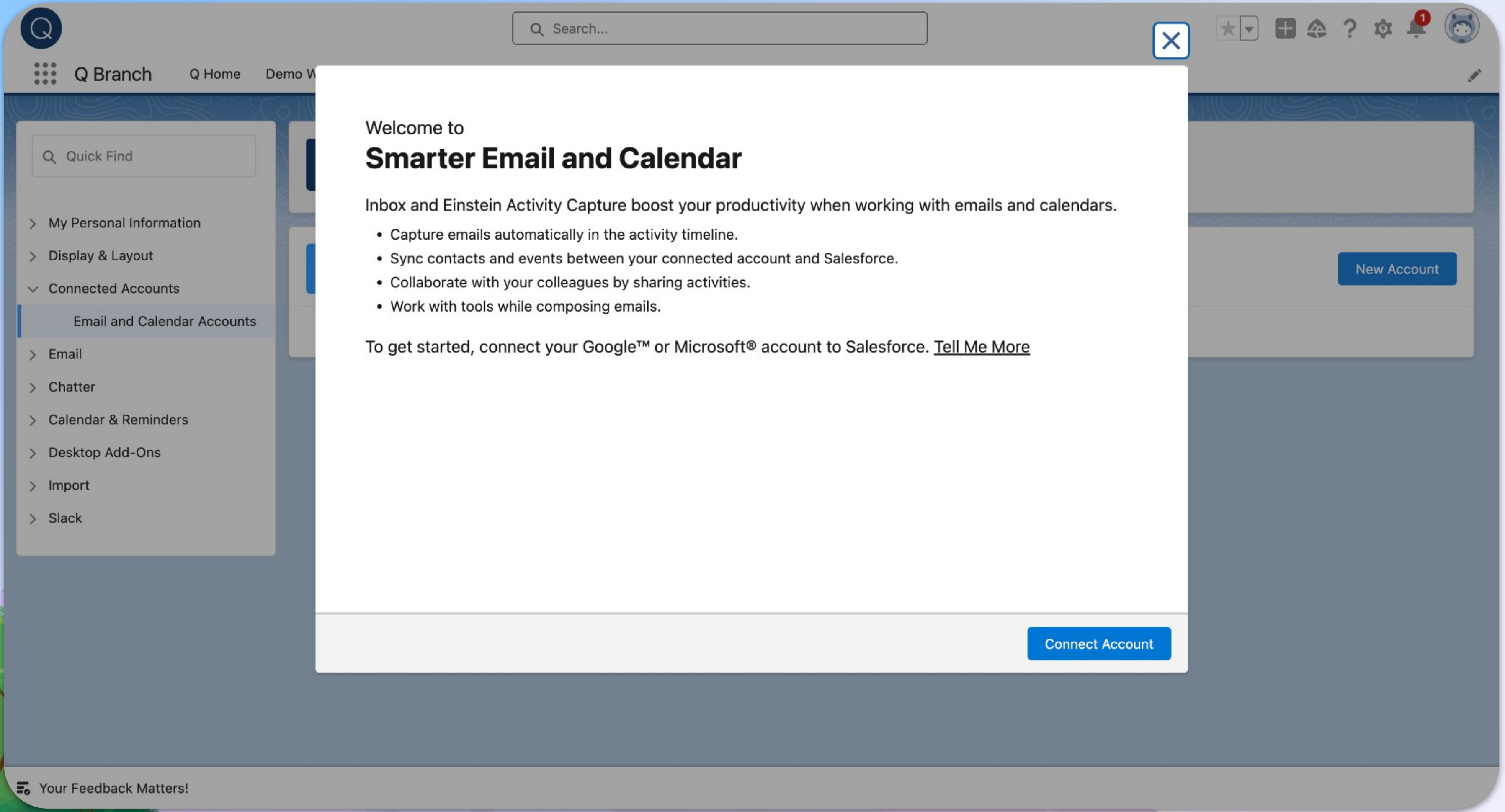
Connect Sales User Email Accounts to Salesforce Inbox

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**.

[Salesforce Help: Grant Sales Users Access to Agentforce SDR](#)
[Salesforce Help: SDR Agent Permissions Sets](#)

Connect Salesforce Inbox

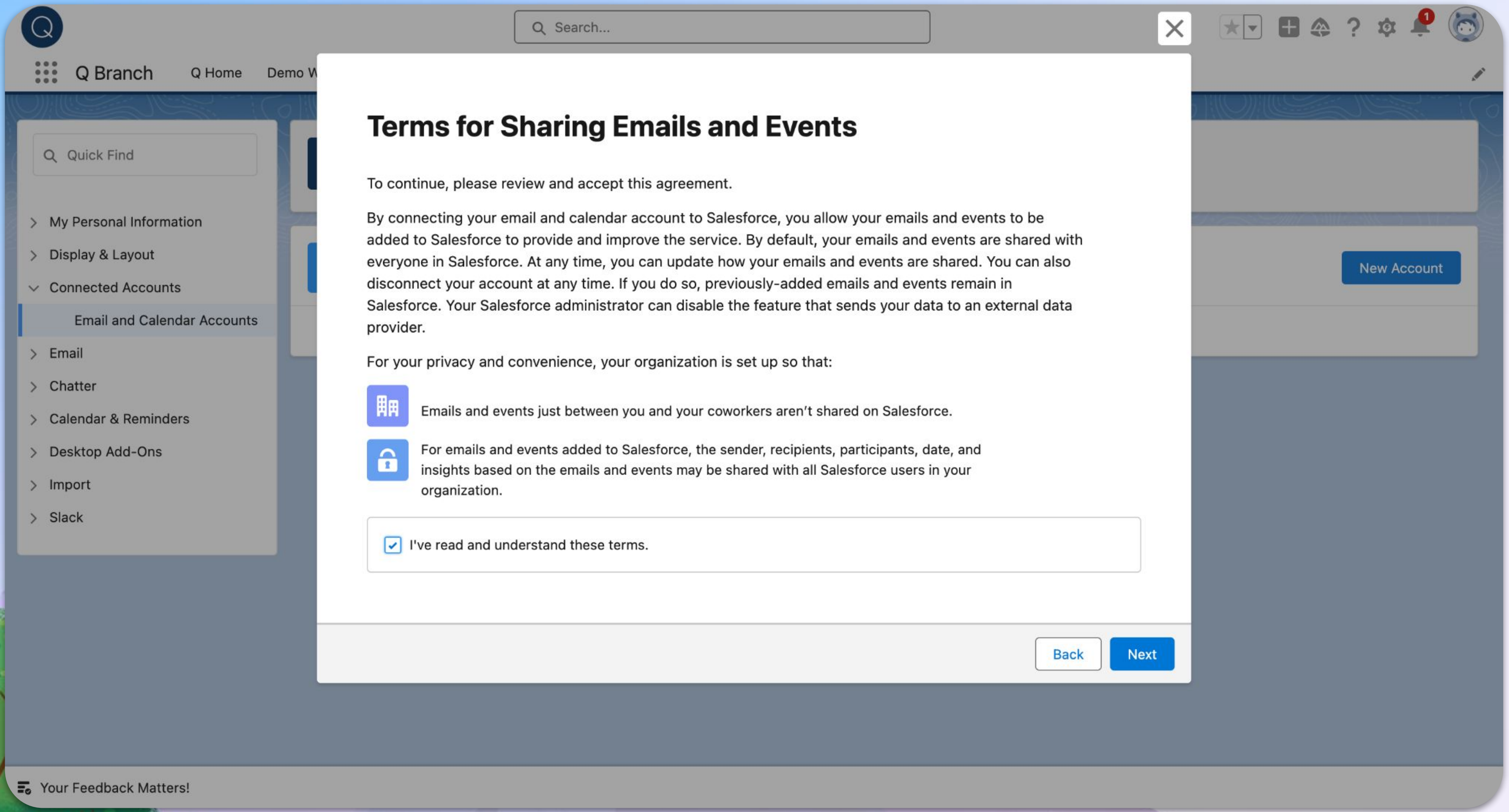


Connect User Email Accounts to Salesforce Inbox

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

[Salesforce Help: Connect User Email Accounts to Einstein Activity Capture]

Connect Salesforce Inbox

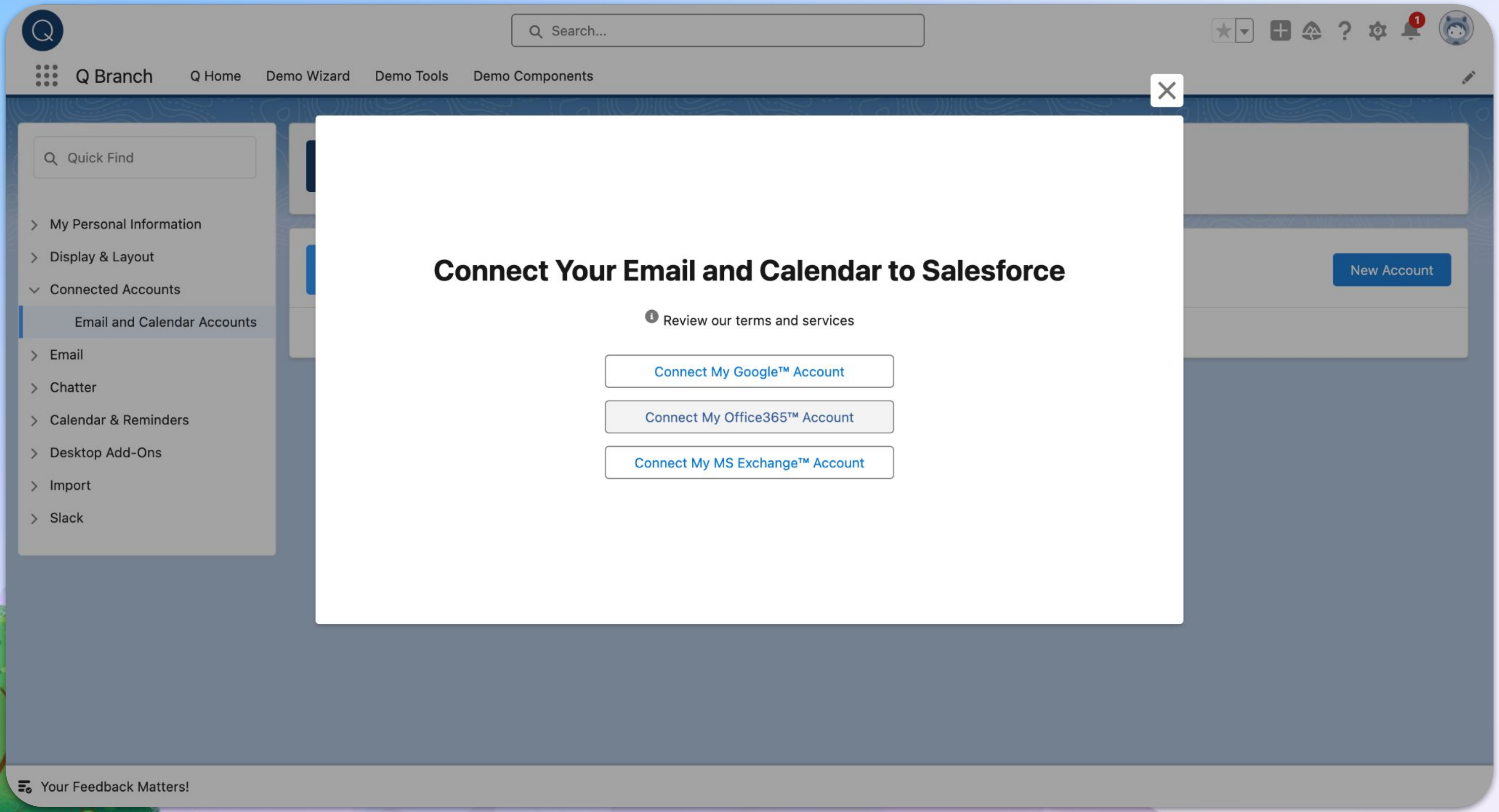


Connect User Email Accounts to Salesforce Inbox

Read the terms and then click **Next**.

[Salesforce Help: Connect User Email Accounts to Einstein Activity Capture]

Connect Salesforce Inbox

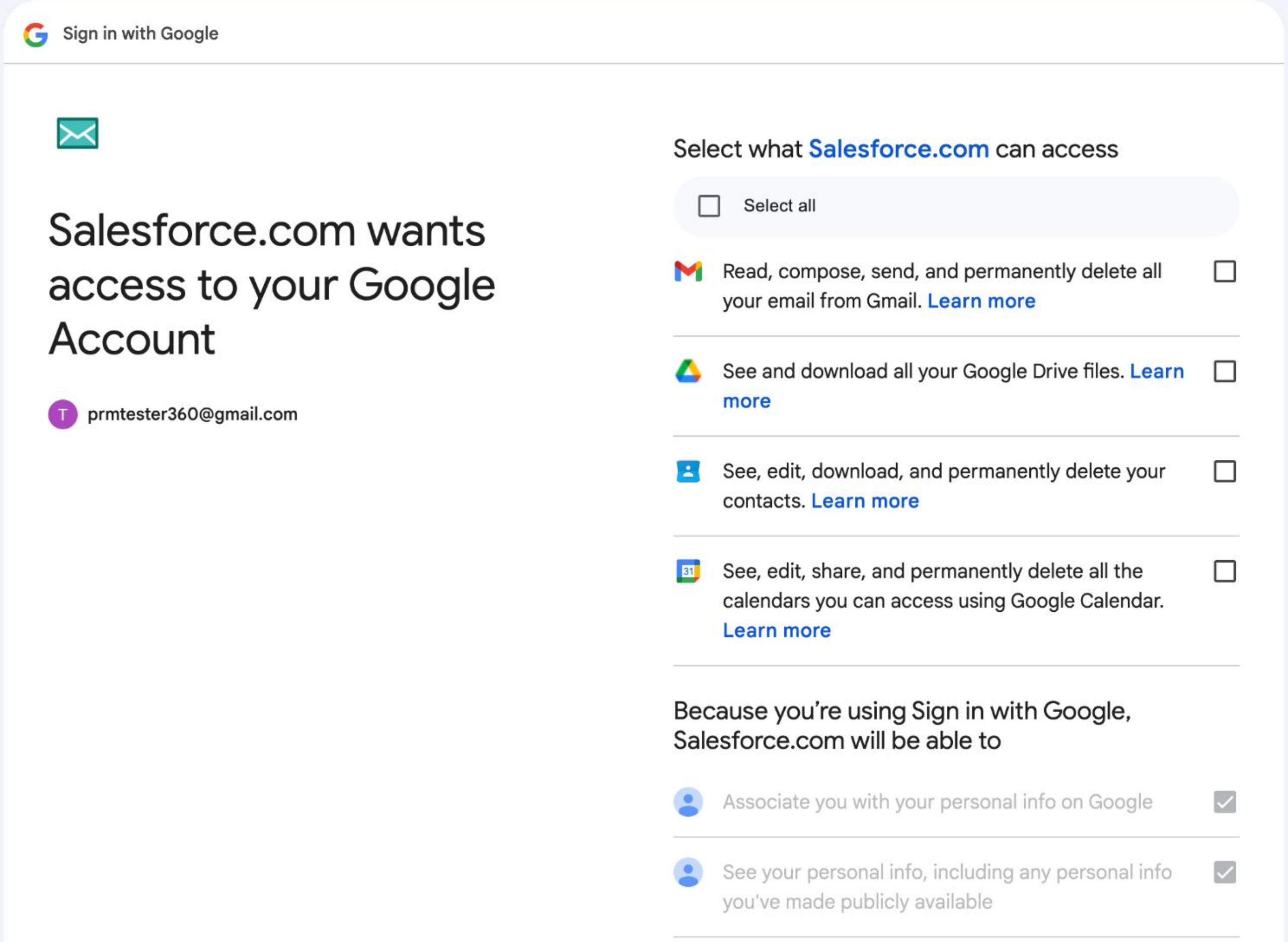


Connect User Email Accounts to Salesforce Inbox

Click the email and calendar service used by your company.

[Salesforce Help: Connect User Email Accounts to Einstein Activity Capture]

Connect Salesforce Inbox

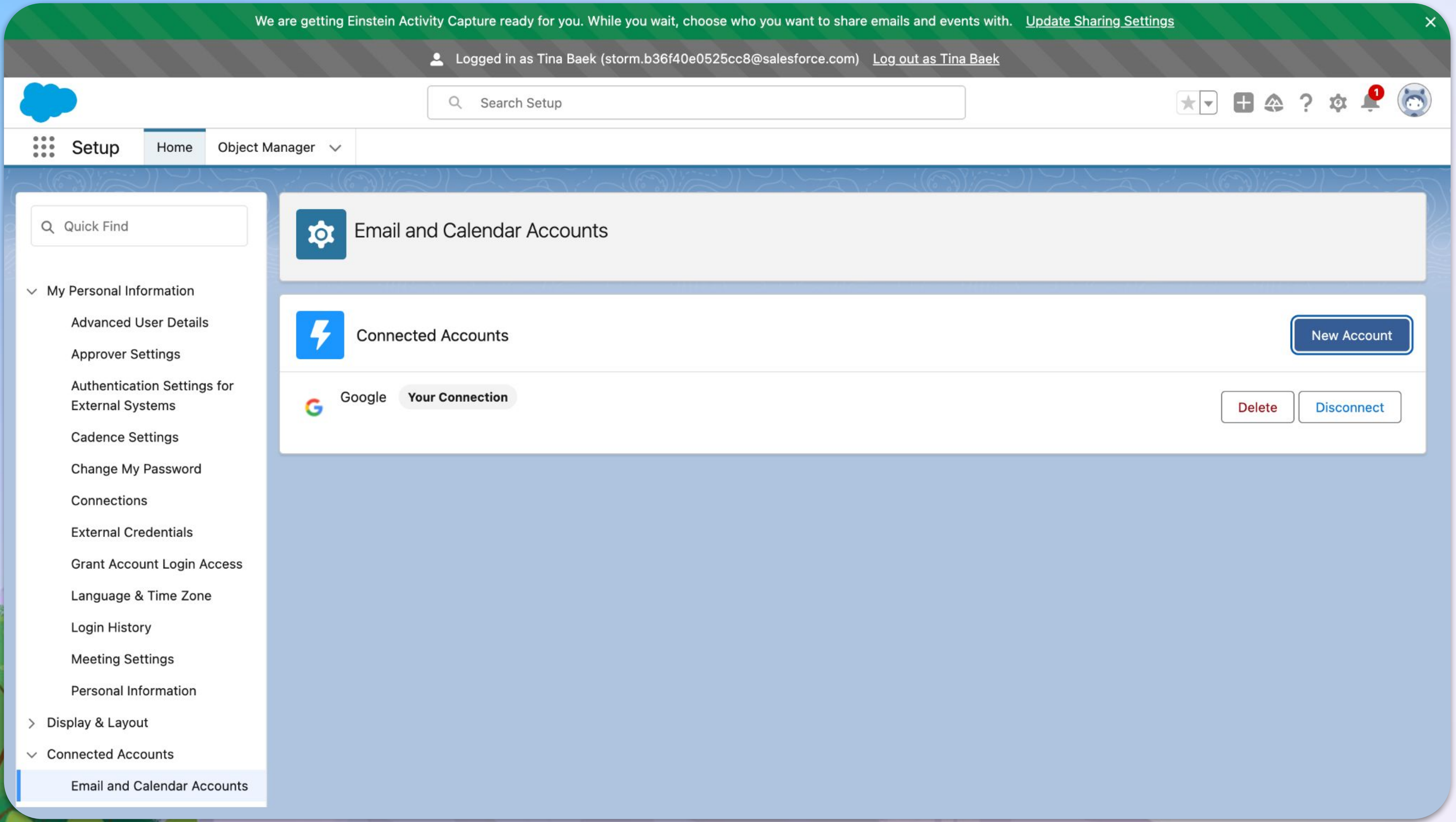


Connect User Email Accounts to Salesforce Inbox

Select the checkboxes for Email and Calendars. Then click **Finish**.

[Salesforce Help: Connect User Email Accounts to Einstein Activity Capture]

Connect Salesforce Inbox

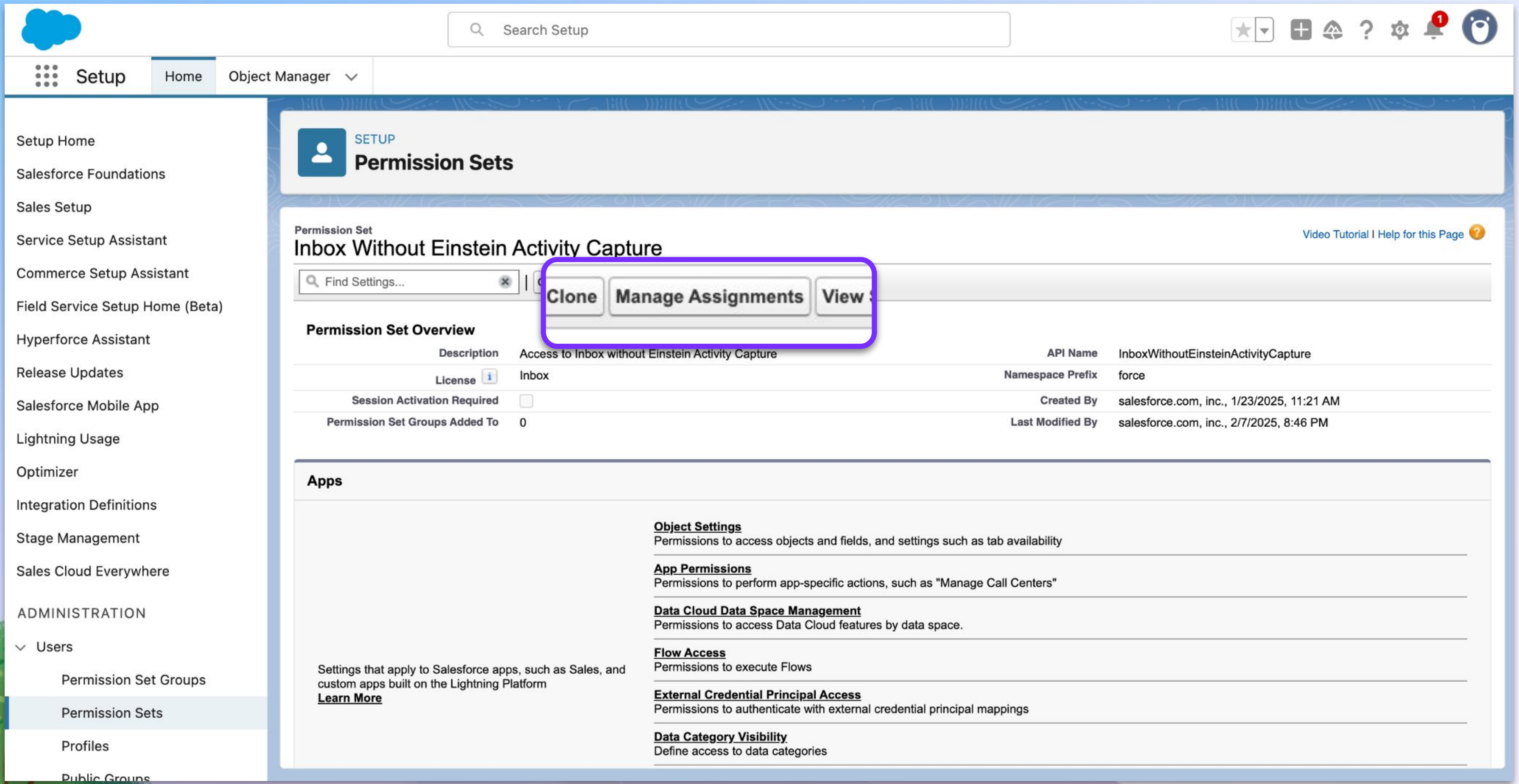


Connect User Email Accounts to Salesforce Inbox

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

[Salesforce Help: Connect User Email Accounts to Einstein Activity Capture]

Grant Sales Users Access to Inbox



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.

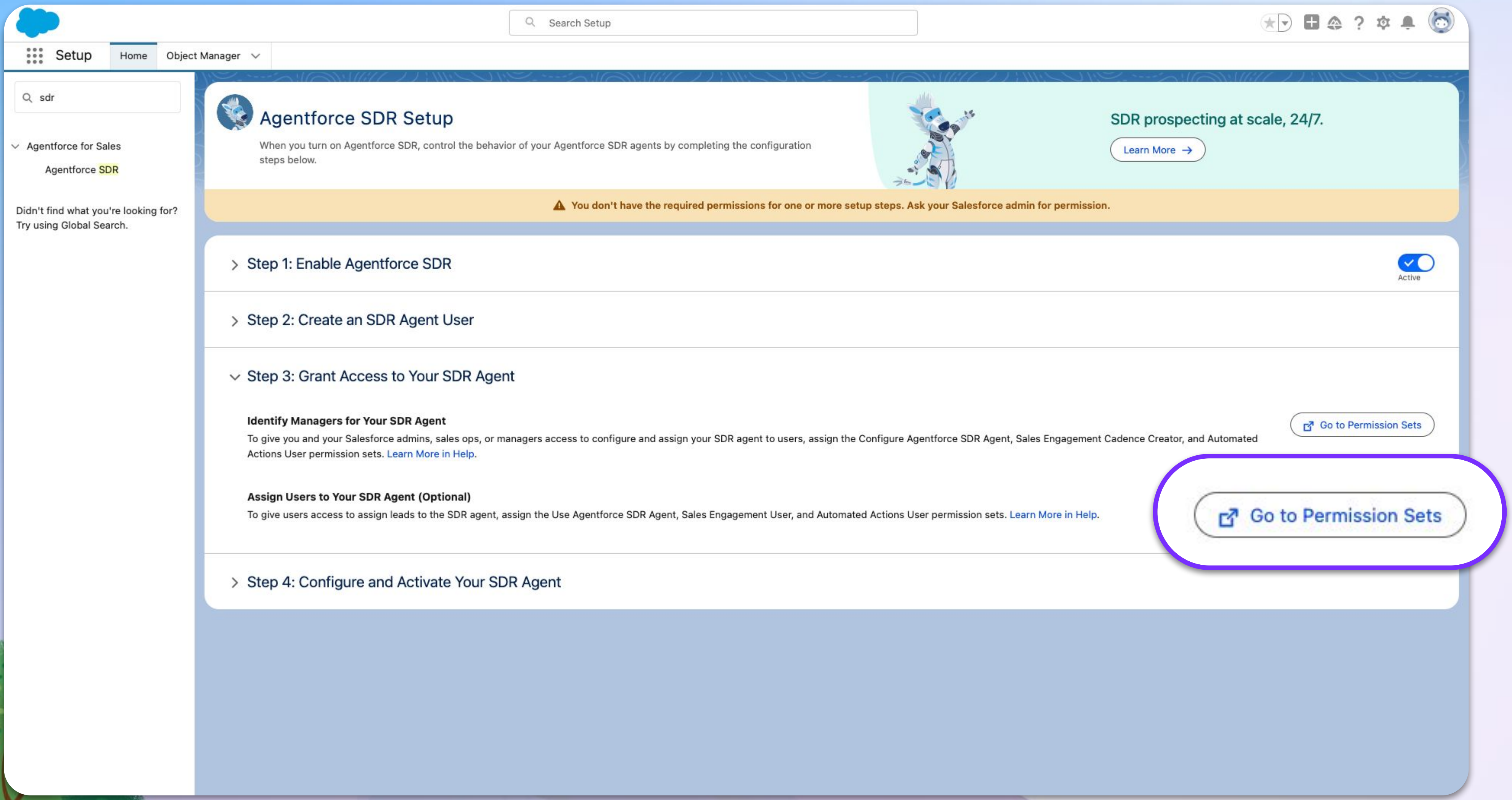
These permission sets include:

- 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](#)



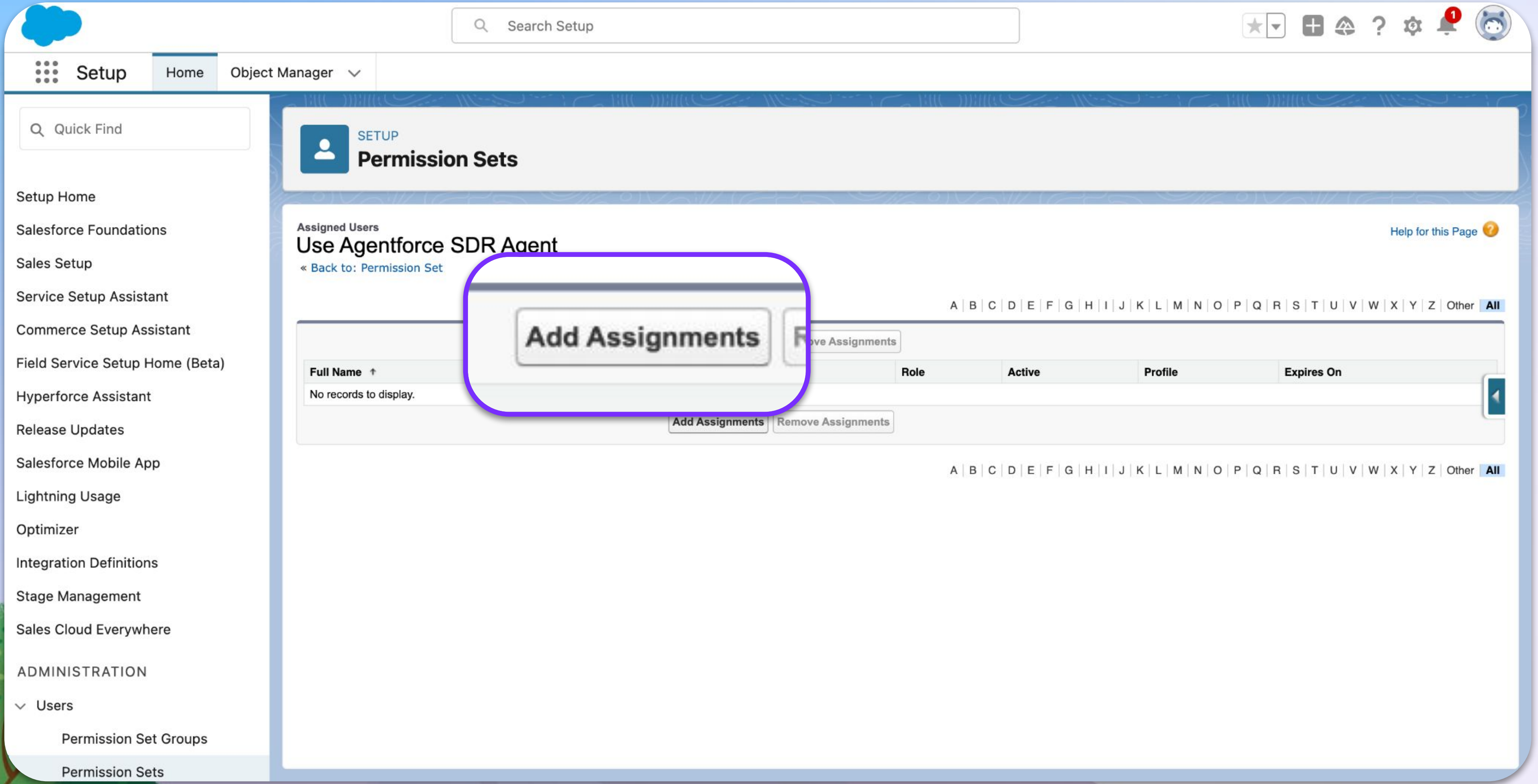
Grant Sales Users Access to Agentforce SDR (optional)

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**.

[Salesforce Help: Grant Sales Users Access to Agentforce SDR](#)
[Salesforce Help: SDR Agent Permissions Sets](#)



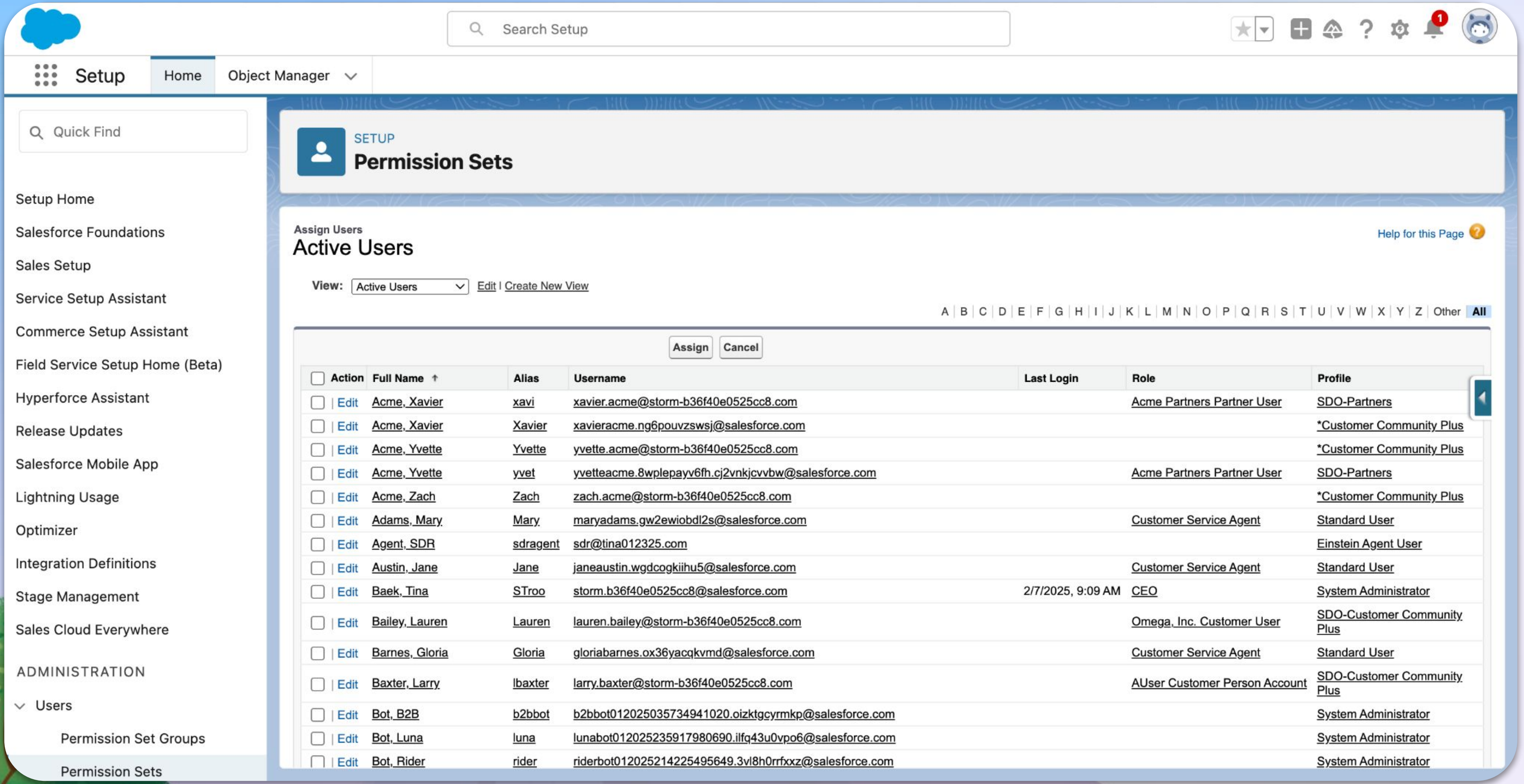
Grant Sales Users Access to Agentforce SDR

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

[Salesforce Help: Grant Sales Users Access to Agentforce SDR]
[Salesforce Help: SDR Agent Permissions Sets]



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.

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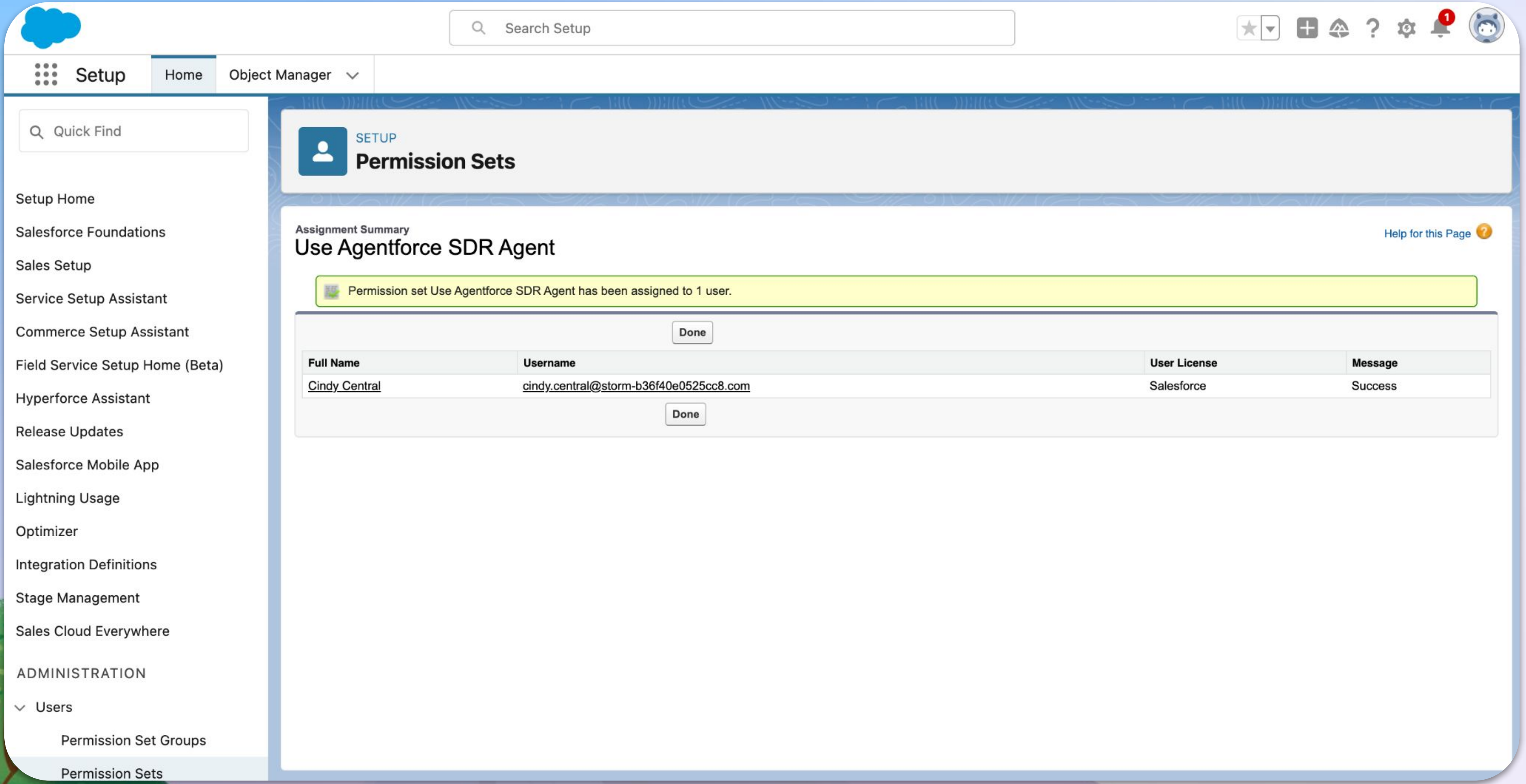
[Salesforce Help: Grant Sales Users Access to Agentforce SDR]
[Salesforce Help: SDR Agent Permissions Sets]



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.

[Salesforce Help: Grant Sales Users Access to Agentforce SDR](#)
[Salesforce Help: SDR Agent Permissions Sets](#)