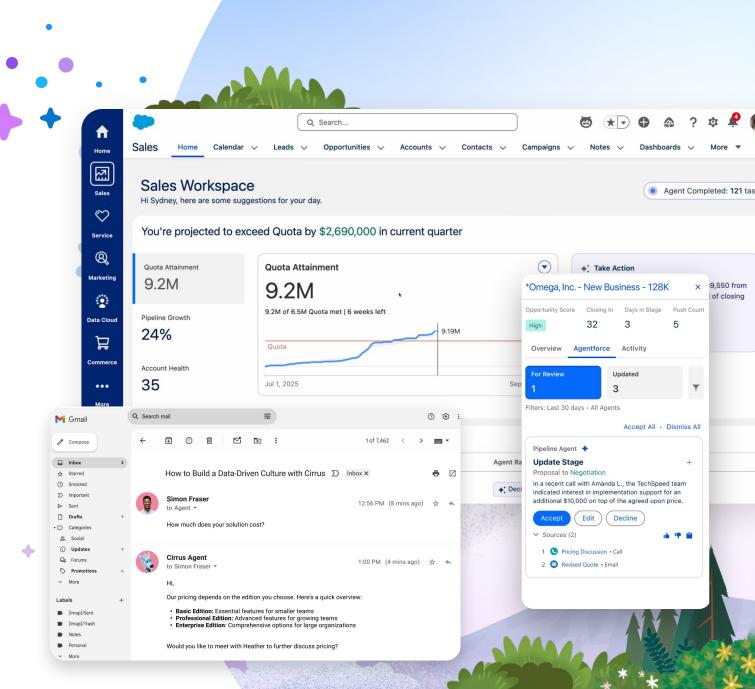
# Agent force Sales Implementation Guide

Updated Oct 2025





### **Table of Contents**

salesforce

- 1 <u>Lead Generation</u>
- 2 <u>Lead Nurturing</u>



## **Agentforce Sales**



#### **Augment Sales Teams at Every Stage**

Agents take action from prospecting to close so reps can focus on building customer relationships.

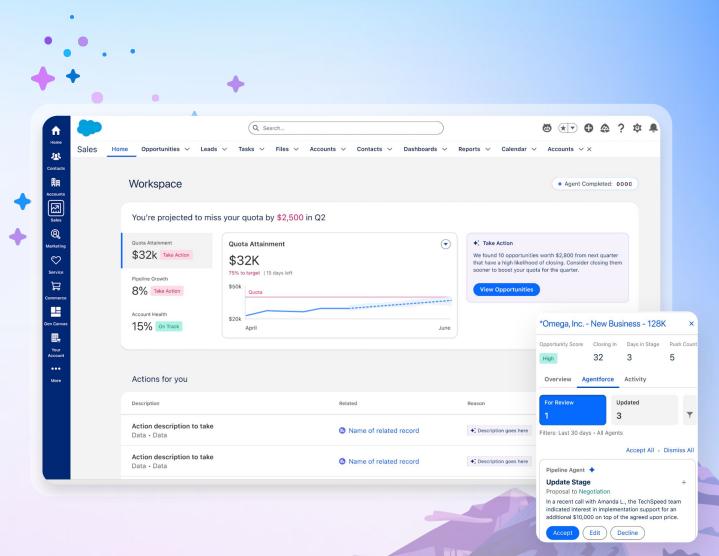
Turn Unified Data into Intelligent Action Give reps and agents insights they need from C360, conversation, external, and unstructured data.

#### **Connect Your End-to-End Sales Process**

Bring your entire extended revenue team together in a single solution to drive efficient growth.

#### **Start Fast, Customize Easily**

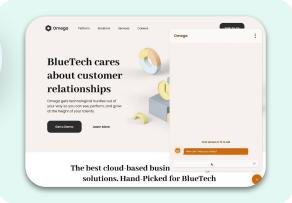
Deploy pre-built templates and tailor them to match your unique sales process.



### How Agentforce Generates & Nurtures Leads





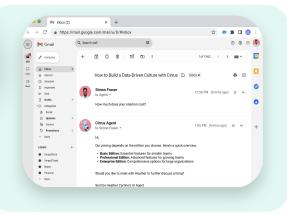


# Generate New Leads on the Web

Expand your existing web agent to capture interest, qualify leads, and book meetings in real-time

**Lead Generation** 





# Nurture Leads by Email

Follow up with personalized email outreach, timely responses, and pass qualified leads to sellers

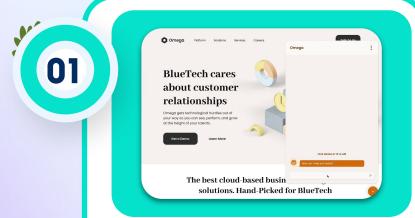
**Lead Nurturing** 

# Agentforce Sales for Lead Generation Setup Guide



### How Agentforce Generates & Nurtures Leads

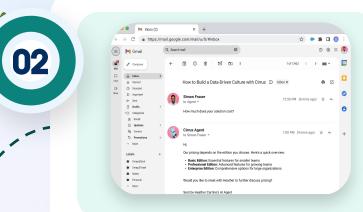




# Generate New Leads on the Web

Expand your existing web agent to capture interest, qualify leads, and book meetings in real-time

**Lead Generation** 



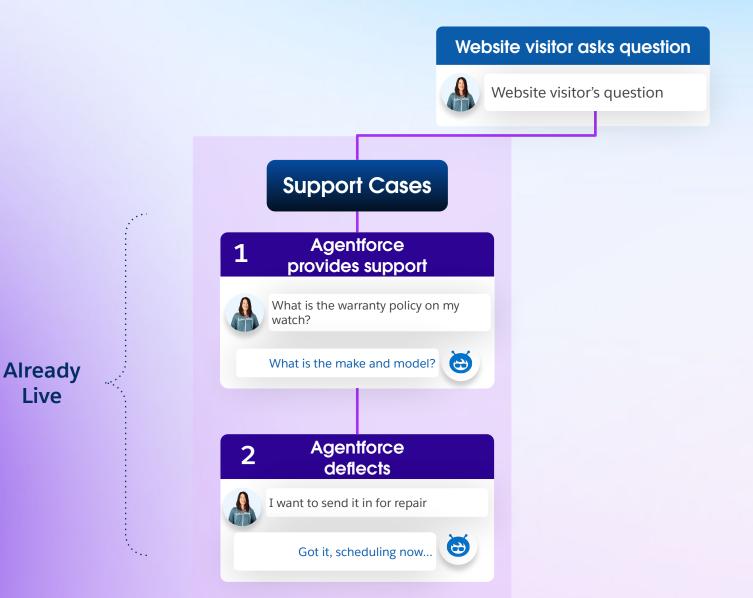
# Nurture Leads by Email

Follow up with personalized email outreach, timely responses, and pass qualified leads to sellers

**Lead Nurturing** 

### Your Web Agent Today: Handles Support Cases Only





### Your Web Agent Tomorrow: Also Generates Leads





New

### Lead Generation comes with all Topics and Actions OOTB





Support Cases Lead Generation

#### **Topics**

Jobs to be done

Actions
Steps to take

**Assess Intent\*** 

**Assess Intent** 

#### Agentforce qualifies

Sure! There are 4 models....



**Answer Questions\*** 

Answer Question w/ Knowledge

#### Agentforce creates lead record

Can you provide your name & email to follow-up?



**Lead Creation** 

**Create Sales Record** 

#### Agentforce books meeting with seller

Here is a <u>link</u> to schedule a meeting.



**Schedule Meeting** 

**Return Calendar Link** 

\*Not OOTB now, requires customization

### Possible Flex Credit Consumption for Lead Generation



Agentforce asses intent to route

Support Cases Lead Generation **Topics** 

Jobs to be done

Actions

Steps to take

**Flex Credits** 

1 action = \$.10

**Assess Intent\*** 

**Assess Intent** 

1 Action:

To assess intent

Agentforce qualifies

Sure! The Racquel watch comes in 4 models.....



**Answer Questions\*** 

Answer Question w/ Knowledge

1 Action:

For every question answered

Agentforce captures lead info & creates record

To assist you further, can you provide your name & email?



**Lead Creation** 

**Create Sales Record** 

1 Action:

To create a lead record

Agentforce books a meeting for the seller

You can schedule a meeting with this link Meeting Link



**Schedule Meeting** 

**Return Calendar Link** 

1 Action:

To schedule a meeting

4 Actions | \$0.40 cents

\*require some customization

### Top Sales Use Cases on the Web





Qualify prospects & create lead records



Book sales meetings in real-time



Timely answers to product questions



Upsell and Cross-sell with product recommendations



Offer special promos or discounts



Provide demo videos or other resources

### Two ways to easily setup lead generation

OOTB Experience: ~1 hour



#### **Activation Steps at a Glance:**

- 1. 1-click enable features in Salesforce Go
- Create agent in step-by-step Guided Config
- 3. Test & Deploy

Extend existing agent: ~1+ days

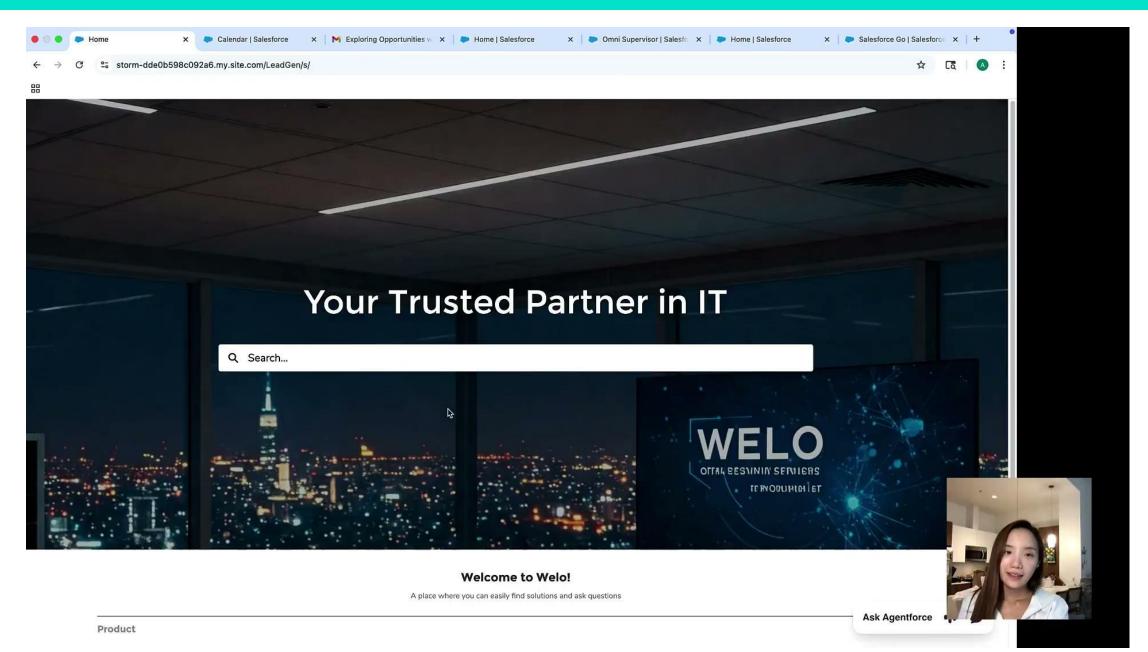


- 1. Set up pre-req features
- Add Lead Generation and Schedule Meeting topics
- Configure above Topics and Actions to work together via Topic Filtering
- 4. Configure instructions of existing Topics to work with new Topics
- 5. [Optional] Customize the Flows
- 6. Test & Deploy





### Agentforce Sales for Lead Gen & Nurturing E2E Walkthrough External Link (TBD)



### **Technology Considerations**



		Yes	No	Will most ASA customers have this enabled already?
Objects	Do you currently use or plan to use the <b>Salesforce Lead, Contact, or Person Accounts object</b>	~	×	(If also using Sales Cloud)
Digital	Do you currently use or will you be using <b>Web</b> to field incoming traffic and questions from prospects?	~	×	~
Channels	Do you currently use <b>Messaging In-App Web</b> or willing to use it?	<b>V</b>	Х	<b>✓</b>
	Do you currently use or are you willing to use <b>Omni-Channel and Digital Engagement</b> ?	~	×	~
Product Supporting Features	Are you willing to use <b>Sales Inbox</b> for meeting scheduling? If not, are you willing to use customizations to bring your own meeting scheduling?	~	×	X
	Do you currently have existing Lead Assignment Rules or other Assignment Rules for your Objects representing prospective customers?	/	×	(If also using Sales Cloud)
Sandbox Readiness	Is Data Cloud properly enabled in your Sandbox environment?	~	×	~

## **Lead Nurturing Permissions**



		Permission Set(s)	Description		
	Agent User	All of the below is auto assigned to Agent when going through Guided Config PSG  • AgentforceServiceAgentUserPsg Permission Set  • Agentforce Service Agent User  • Data Cloud • Inbound Lead Generation Agent • Einstein Prompt Templates • Create custom perm set → App Permissions → Inbox Scheduling Proxy User	Allows the Agent to interact with customers on web and create leads/contacts/person accounts, qualify them, and schedule meetings		
	Sales Manager / Admin	All of the below is auto assigned to Agent when going through Guided Config  Configure Inbound Lead Generation Agent Data Cloud Architect	Allow sales manager to view and configure the Lead Generation experience		
	Sales User	<ul> <li>Use Agentforce SDR Agent</li> <li>Inbox Perm         <ul> <li>Inbox With Einstein Activity Capture is recommended (see <u>slide</u> for more details)</li> </ul> </li> </ul>	Allow sales users to access and interact with Agentforce SDR, and send leads to SDR Agent		

### **Implementation Guide Overview**

Enable Agentforce for Sales

Enable required
features and
complete
prerequisite setup
steps

Time: 5 mins

2 Create and Test

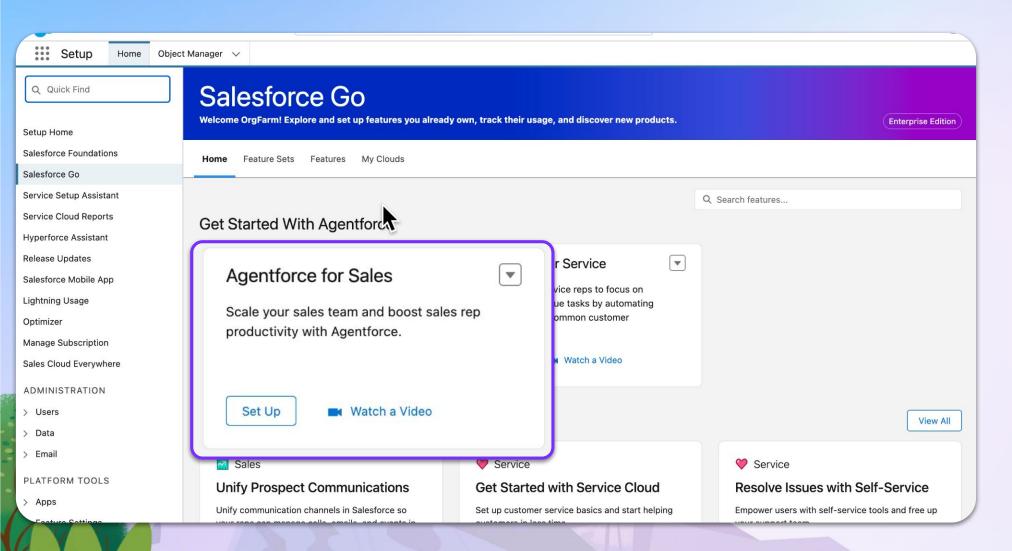
Simple No-Code Agent Creation and Testing

Time: 5-7 mins

3 Runtime & Monitoring

Monitor your agent activity and outcomes

Time: 3-5 mins

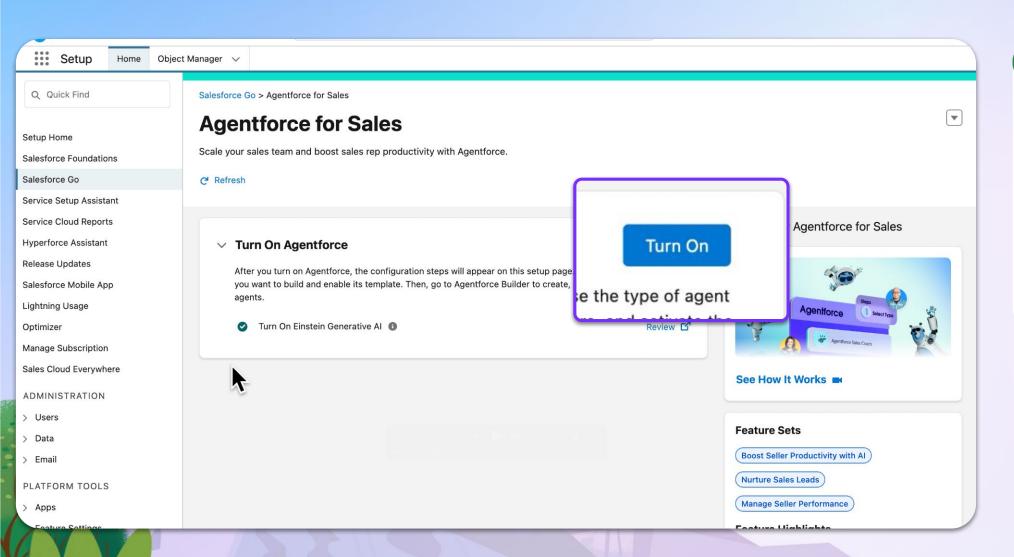




### Discover Agentforce for Sales in Salesforce Go

Find Salesforce Go in Setup.

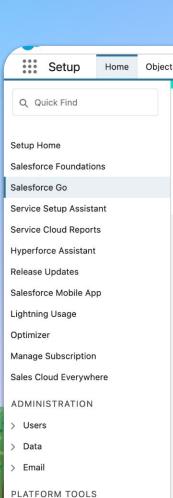
Discover Agentforce for Sales in Go Home.



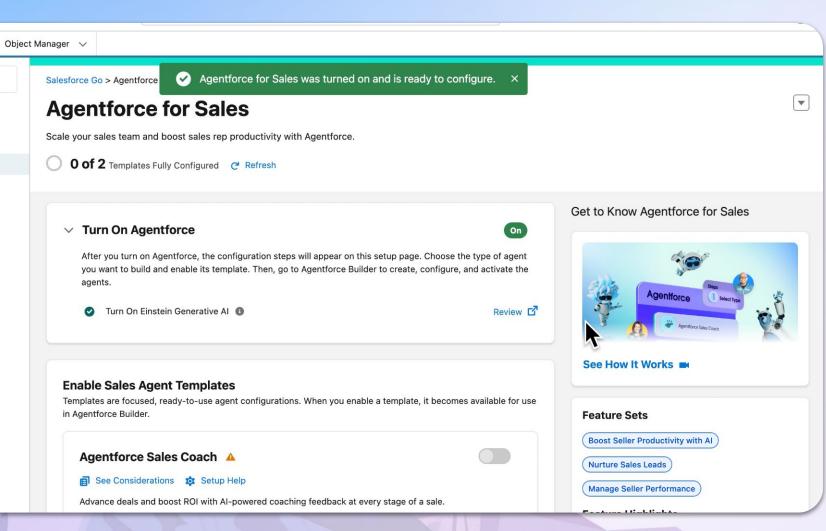


Discover Agentforce for Sales in Salesforce Go

Turn on Agentforce.



Apps

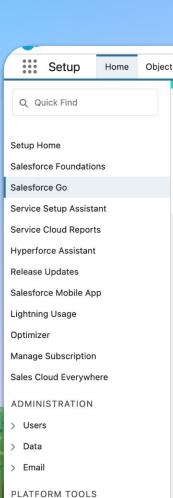




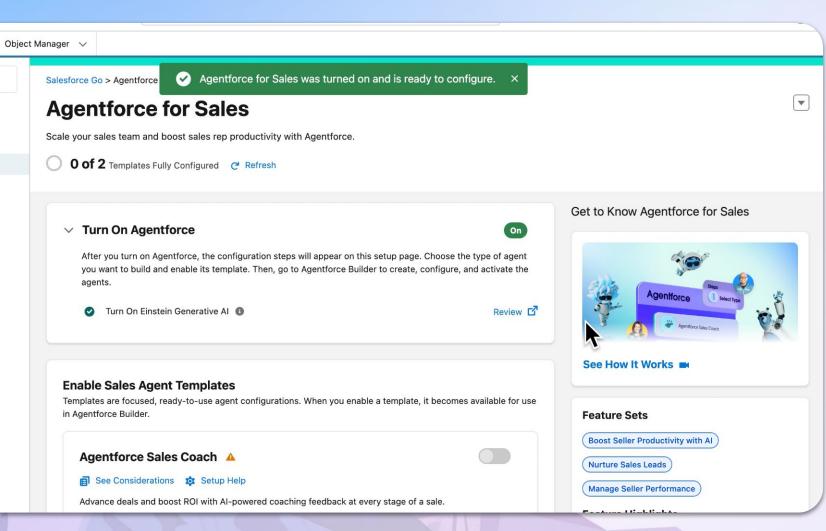
### Discover Agentforce for Sales in Salesforce Go

Verify that Agentforce is on.

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



Apps

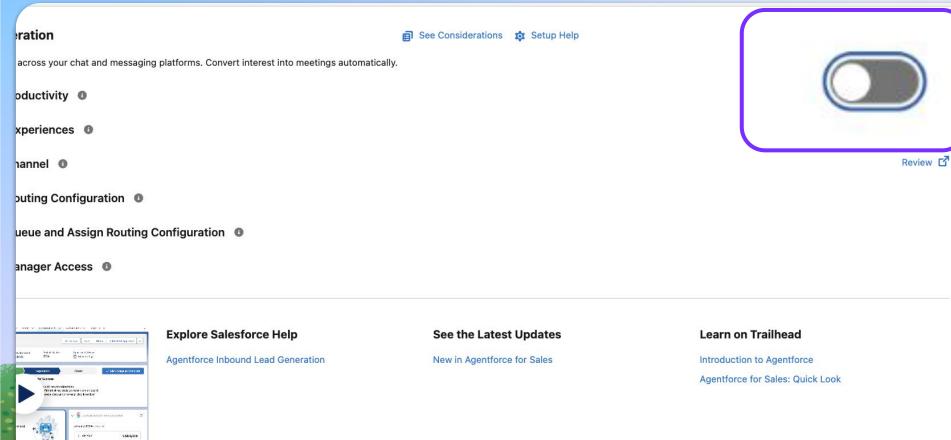




### Discover Agentforce for Sales in Salesforce Go

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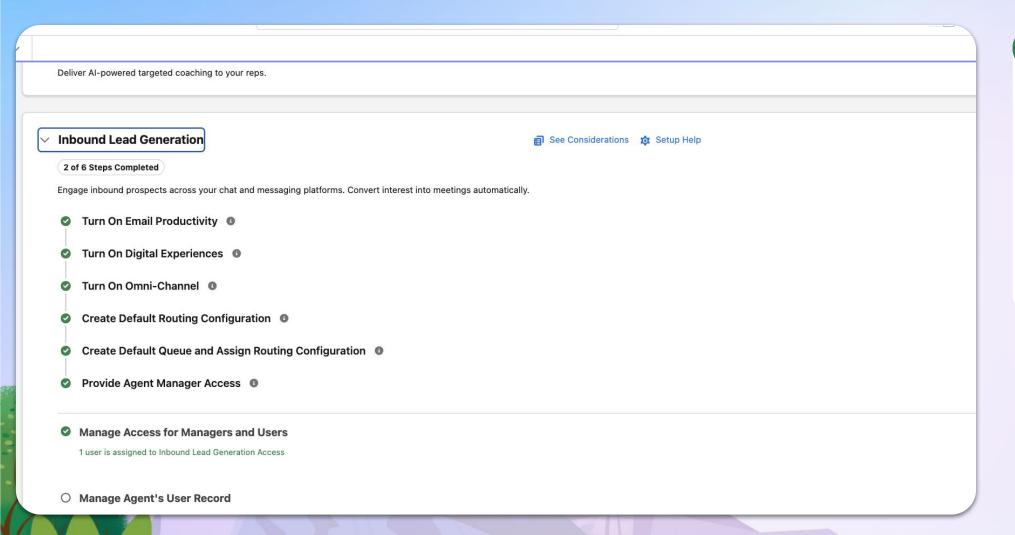
You can see subsequent Sales Agent Templates once Agentforce is on. 2





#### Turn on features in Go

Flip on toggle under Inbound Lead Generation and click confirm



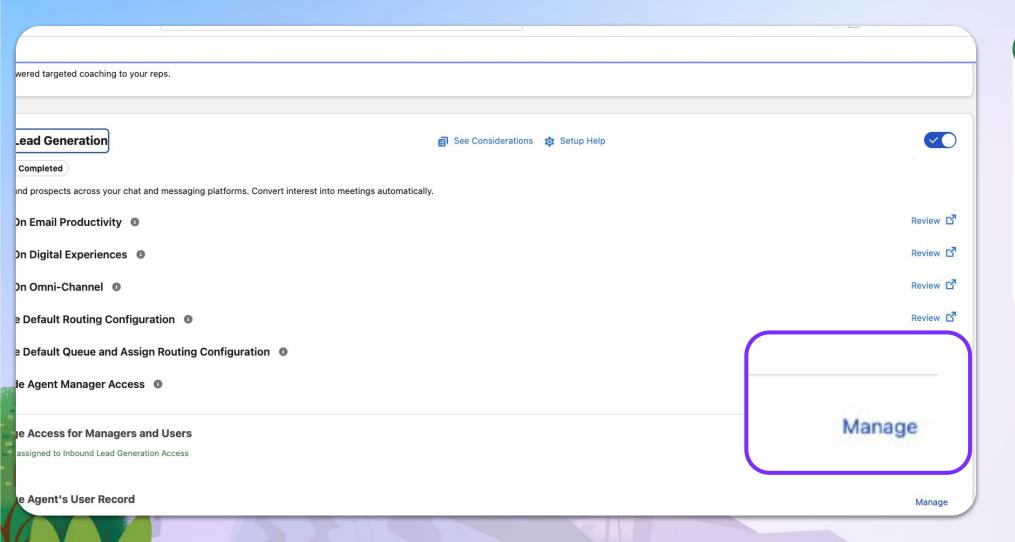


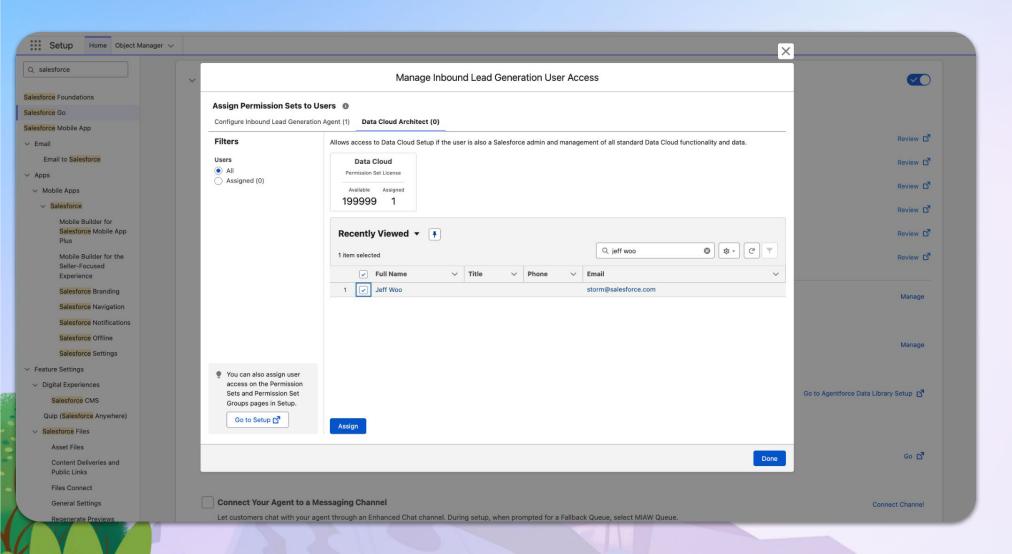
### Confirm everything has been enabled

You should see green checks next to every feature

#### **Assign Agent Managers**

Click Manage for "Manage Access for Managers and Users"

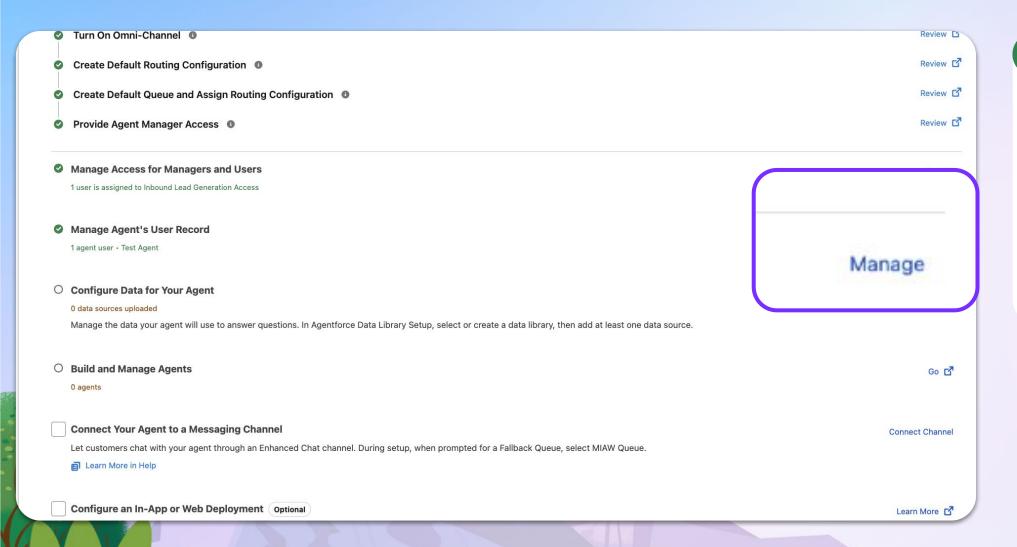






#### **Assign Agent Managers**

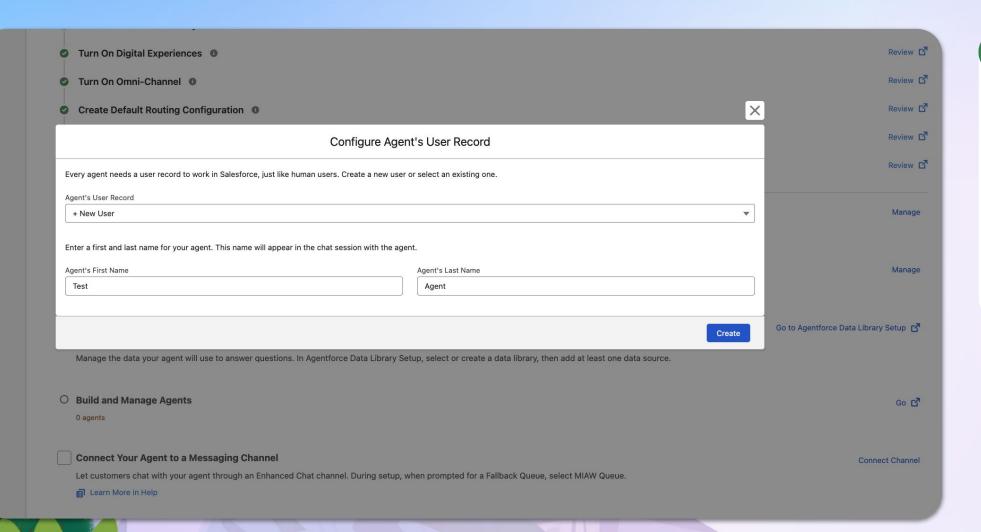
Select users you want to manage agent, and assign them for both "Configure Inbound Lead Generation Agent" and "Data Cloud Architect"





#### **Create Agent User**

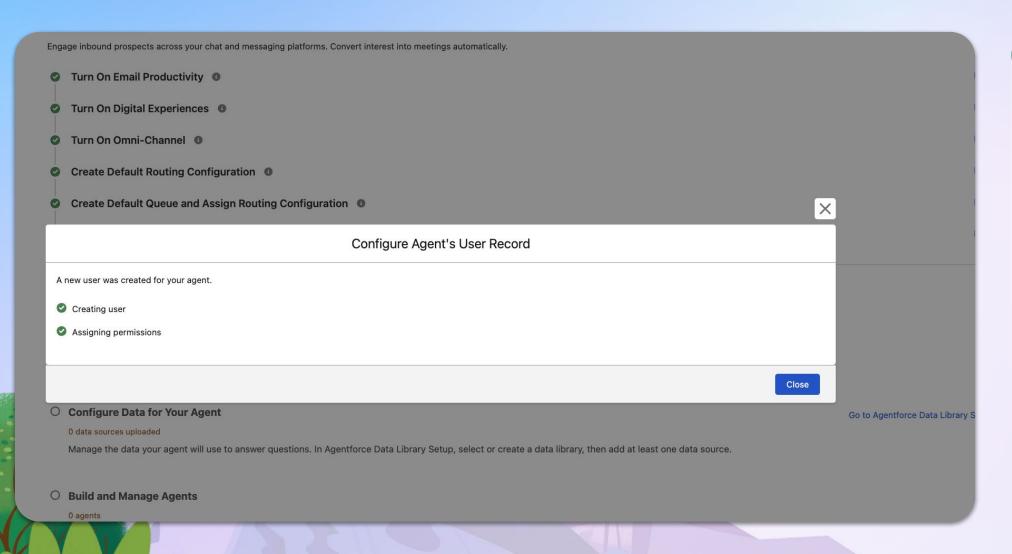
Select "Manage" for "Manage Agent's User Record"





#### **Create Agent User**

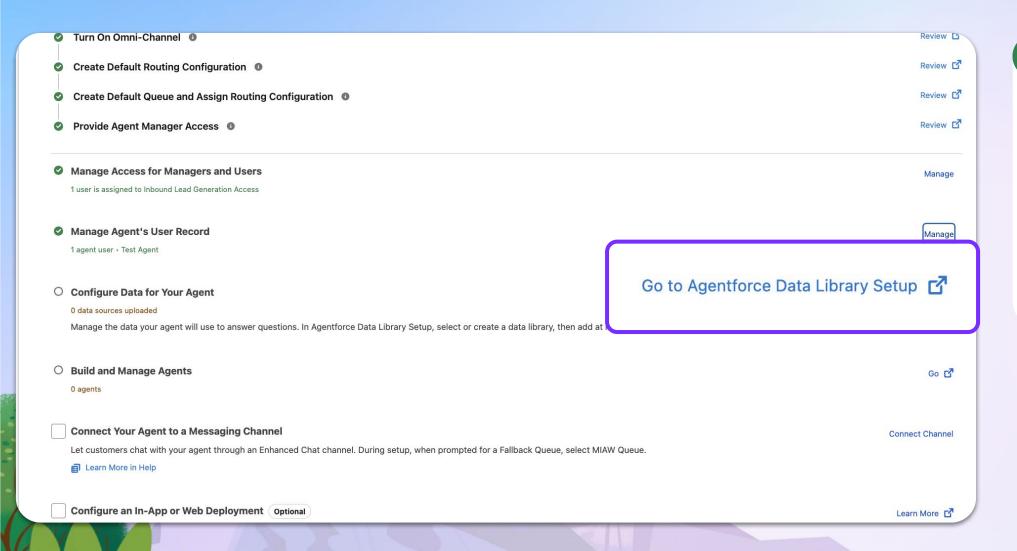
Select existing user or create a new one





#### **Create Agent User**

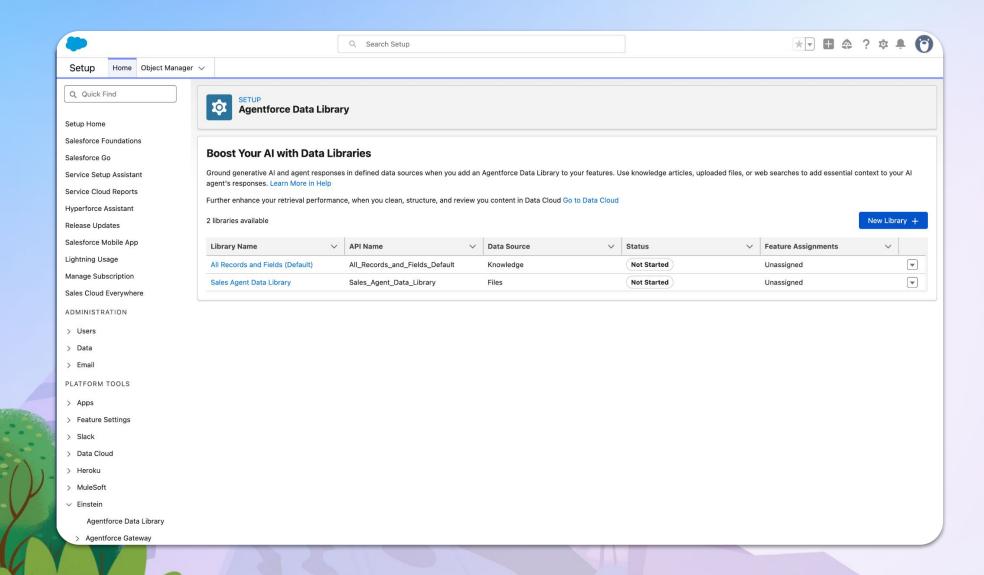
Confirm that record has been created





Manage the data your agent will use to answer questions or complete tasks

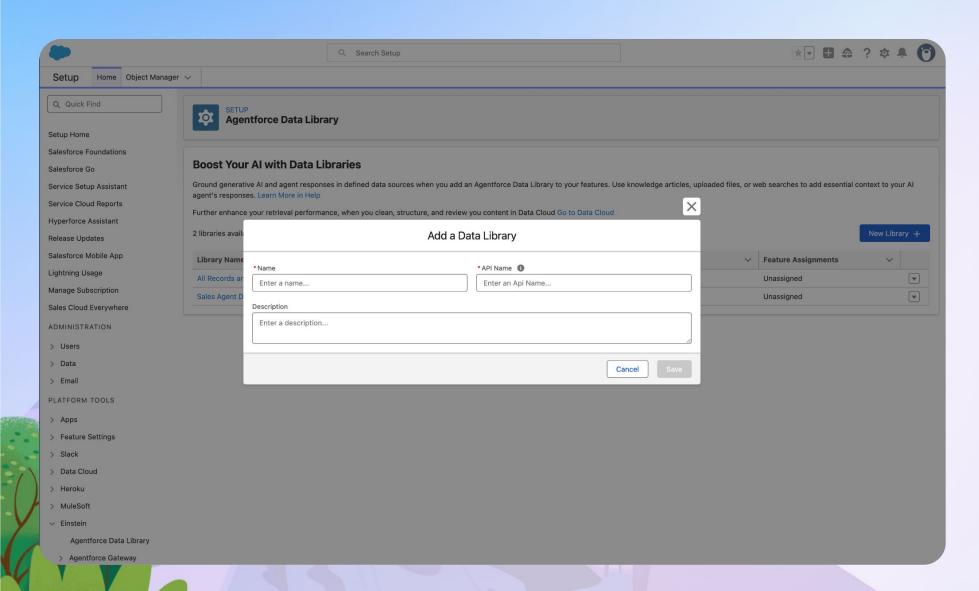
Click 'Go to Agentforce Data Library Setup'.





Your Sales Agent can use 'Retrieval Augmented Generation' to provide accurate answers or complete tasks efficiently.

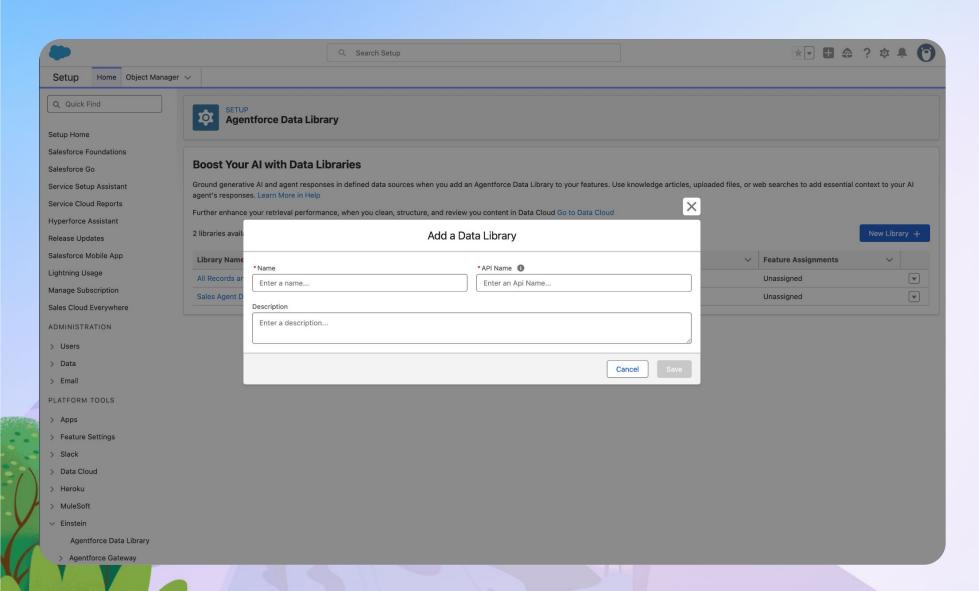
Click 'New Library'.





Define your Name and Description for the new Data Library

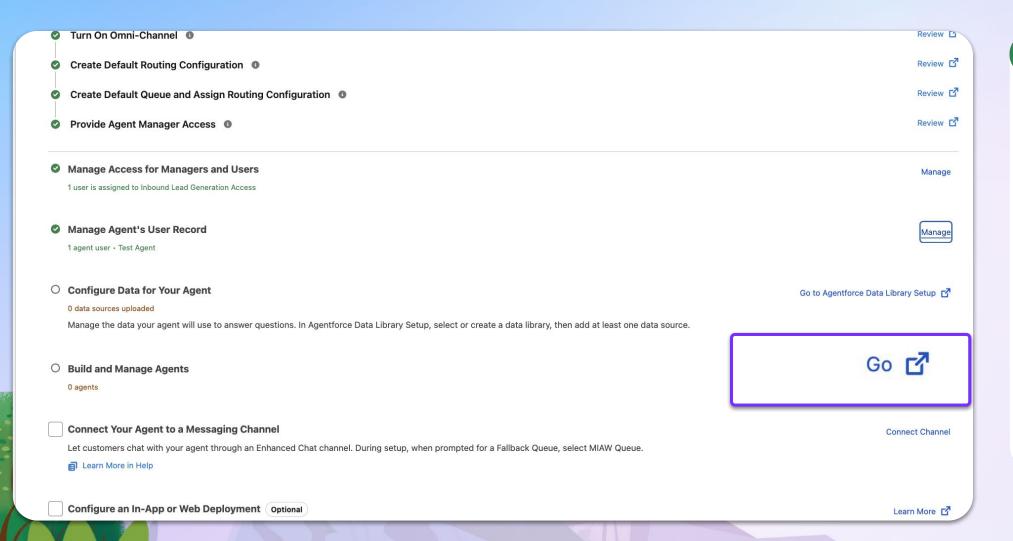
Click 'Save'.





Define your Name and Description for the new Data Library

Click 'Save'.





#### 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.



#### **Build and Manage Your Sales Agents**

Access the agents you've created here. Click an agent to view, edit, or continue building it. Or build a new agent. To see all agents, including those created elsewhere, go to Agentforce Builder.

Q Search agents...

♦: Build a New Agent

Agent Name ↑	Туре	Status	Agent User Record	Last Modified	Created By
Bryan's Welo Agent	Lead Nurturing	Inactive	Welo Sales Agent	Oct 14, 2025	Ziggy PM
<b>Event Invitation Agent</b>	Lead Nurturing	Inactive	Welo Sales Agent	Oct 13, 2025	Ziggy PM
Meeting Scheduling Agent	Lead Nurturing	Inactive	Welo Sales Agent	Oct 13, 2025	Ziggy PM
Onboarding Agent	Lead Nurturing	Inactive	Welo Sales Agent	Oct 13, 2025	Ziggy PM
Renewals Agent	Lead Nurturing	Inactive	Welo Sales Agent	Oct 13, 2025	Ziggy PM
Test	Inbound Lead Generation	Inactive	Web Agent	Oct 1, 2025	Shashank Tejura
Test Welo Agent [Archived]	Inbound Lead Generation	Inactive	Welo Sales Agent	Oct 11, 2025	Ziggy PM
Welo AMER Agent	Lead Nurturing	Active	Welo Sales Agent	Oct 2, 2025	Ziggy PM
Welo Sales Agent Archived	Inbound Lead Generation	Inactive	Welo Sales Agent	Oct 3, 2025	Ziggy PM
Welo Sales Agent EMEA	Lead Nurturing	Inactive	Welo Sales Agent	Oct 9, 2025	Ziggy PM
Welo Web Agent	Inbound Lead Generation	Active	Welo Sales Agent	Oct 3, 2025	Ziggy PM
Winback Agent	Lead Nurturing	Inactive	Welo Sales Agent	Oct 13, 2025	Ziggy PM
[Archived] Web Test	Inbound Lead Generation	Inactive	Welo Sales Agent	Oct 14, 2025	Ziggy PM
tact	Lead Nurturina	Inactiva	Waln Salas Anant	Oct 14 2025	7iaav PM



#### **Build a New Agent**

Simplified Creation Experience allows for fast and no-code agent setup.

To create a new Agent, click 'Build a New Agent'.











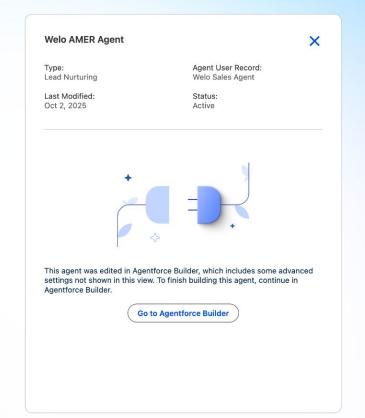
Q Search... Tableau Insights Calendar V Account Plans V

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Winback Agent	Lead Nurturing	Inactive	Welo Sales Agent	Oct 13, 2025	Ziggy PM
[Archived] Web Test	Inbound Lead Generation	Inactive	Welo Sales Agent	Oct 14, 2025	Ziggy PM



#### **Edit an Existing Agent**

Any agent created through this new experience can be edited if the following conditions are met:

- Agent is not edited outside of this experience
- Agent is deactivated

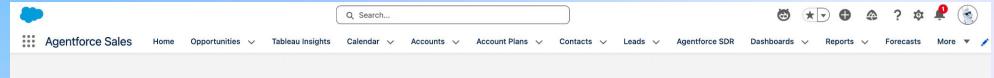
If not, you will see a link to edit the agent in Builder.







untime Monitoring



#### **Select an Agent Template**

Pick the template that best fits the job you want this agent to do. Each one comes with tailored topics and actions.

Lead Nurturing

Reach out to existing leads. Nurture interest into meetings automatically.

10 Agents Available





#### Sales Agent Configuration: Select Agent Template

Choose the agent template you want to create. Select 'Inbound Lead Generation', then click 'Continue'.

If you don't see the template, the necessary prerequisites are not yet turned on in Go. Go back to Salesforce Go to make sure the feature is enabled properly.



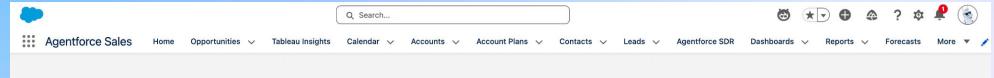








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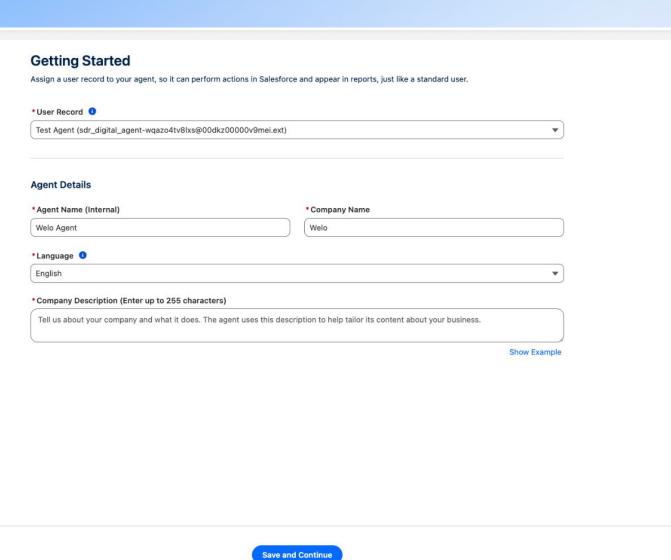
**Getting Started** Configuration ead Generation Assign a user record to your agent, so it can perform actions in Salesforce and appear in reports, just like a standard user. g Started \*User Record 0 Test Agent (sdr\_digital\_agent-wqazo4tv8lxs@00dkz00000v9mei.ext) sation Settings t Knowledge: e Prospect **Agent Details** \* Agent Name (Internal) \* Company Name and Activate Welo Agent Welo \*Language 0 English \*Company Description (Enter up to 255 characters) Tell us about your company and what it does. The agent uses this description to help tailor its content about your business. Show Example Save and Continue



#### **Getting Started**

To get started, select the appropriate user record for this agent. The drop down to select user records should only show user records with the appropriate user perms associated.

If you don't see the desired user record to configure the agent with, go back to Salesforce Go user creation and setup step to make sure the user record is **verified**.





#### **Getting Started**

Fill out the remaining details as desired.

The Agent Name field is the "internal name" that will not be shown in emails or any external engagement. We recommend you to create unique internal names to differentiate between multiple agents of the same type.

Select the company name, default language, and company description. This information will be used by the agent to further personalize the emails. 226

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#### **Conversation Settings**

Your agent can chat with prospects on your website or in-app messaging, answering questions, capturing lead details, and booking meetings.

#### **Core Messaging**

Give your agent the main points you want them to know about your business. This text won't be quoted word-for-word, but it will help guide their message when it makes sense.

#### \* Primary Value Proposition

Welo offers top-tier IT solutions and services, specializing in hardware and services for managing data centers. Our commitment to excellence and innovation ensures we deliver unparalleled services that empower businesses to thrive and innovate.

Show Example

#### \*Key Achievements

Transforming Retail Operations: Partnered with a major retail chain to implement a custom CRM solution, resulting in a 30% increase in sales and a 25% improvement in customer retention.

Show Example

#### **Additional Settings**

#### Al Disclosure

Hi there! I'm an Al sales assistant here to help with questions, product information, or scheduling time with a sales representative.

#### Message Tone

Casual

age folie

#### **Preview Conversation**



#### Let's chat!

Hi there! I'm an Al sales assistant here to help with questions, product information, or scheduling time with a sales representative.

Describe your task or ask a question...



#### **Conversation Settings**

This is the core of personalizing your agents. Provide the agent with details on the primary value proposition and key achievements such that the agent will use the information appropriately.

See the examples for reference and adapt based on your company information.

These values will be stored and translated to topic instructions for the agent.







#### **Conversation Settings**

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#### **Conversation Settings**

Once you're happy with your inputs try testing your agent! You can use the right chat panel to simulate being a website visitor. This will mock a conversation with the Agent

Note that going through this flow will create a record in the CRM, so you may need to clean up those records later





Continue

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#### **Product Knowledge**

Your agent can respond to customer replies, including answering product questions using your selected data sources.

#### **Select Data Library**

To let your agent respond to product-related questions, select a data library from Data Cloud. Some data sources may have already been added by your Salesforce admin.

.

Content added in Add Data Sources won't appear in agent responses right away. It may take up to 24 hours to become available.

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

#### **Data Library**



#### **Preview Conversation**



#### Let's chat!

Hi there! I'm an AI sales assistant here to help with questions, product information, or scheduling time with a sales representative.

Describe your task or ask a question...



#### **Product Knowledge**

Associate the agent with the data library you created in Salesforce Go.

It takes a few hours for all uploaded files to be ready for agent preview. Therefore, if you have not pre-created the library and uploaded files, expect some delay in the uploaded knowledge to be available for the agent.

Back



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#### **Preview Conversation**



#### Let's chat!

Hi there! I'm an AI sales assistant here to help with questions, product information, or scheduling time with a sales representative.

Describe your task or ask a question...



#### **Product Knowledge**

Test your agent responses! You can simulate a conversation here to see how it would answer questions

If the agent is grounded on this knowledge and it is "ready" for usage, the agent should respond appropriately to any questions asked.

Back



Continue

neration

Manage how your agent captures prospects in Salesforce, what data it collects, who meetings are booked with, and whether to add authentication \* Prospect Object O Lead O Contact **Lead Creation** Your agent will automatically create a record for each prospect using the fields collected during conversations. To see how the default record owner is assigned, review your organization's assignment rules. Agent Collected Data Field Ask Agent to Collect? First Name Field Ask Agent to Collect? Last Name Field Ask Agent to Collect? Company Field Ask Agent to Collect? Email Field Ask Agent to Collect? \* Default Value Status New Email One-Time Password (OTP) Authentication (1) Use OTP Authentication to verify prospects before creating the record.

Continue

Back



### Capture Prospect Information

Set what types of records you want your agent to create. You can chose Leads, Contacts or Person Accounts (if you enable them in your org).

You will need to set a default value for Status as we don't want the agent to ask customers for that information

The agent will set the owner of the record based on your existing Lead Assignment Rules

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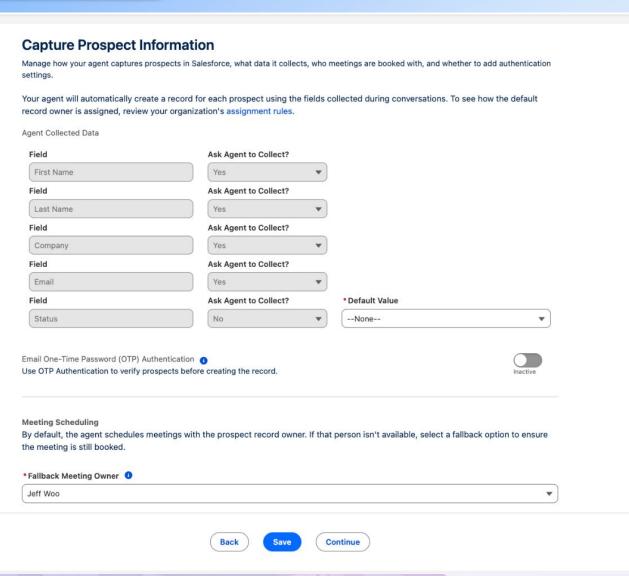
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### Capture Prospect Information

Optionally, you can choose to enable OTP, which will send an authentication code to customers before creating a record of them to verify their email.

Lastly, you need to set a fallback meeting owner to schedule meetings with in case there is no lead owner.

This fallback user must have connected an Email via Inbox

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edge

tivate

#### **Review and Activate**

It's almost go time! Take a final look at your agent's configuration, including your settings and the additional settings configured by default. When you're ready, activate your agent and head to the Control Center to track its progress.

#### **Next Steps**

Once you're satisfied with your agent details:

- 1. Activate your agent.
- 2. Go to Setup to connect a messaging channel and configure an in-app or web deployment.

#### Agent Details

**Conversation Settings** 

Tone

Casual

Core Messaging

(-----

Primary Value Proposition

Company Description ) ( Key

Key Achievements

#### Disclosures

Al Disclosures

**Capture Prospect Information** 

#### Object

Leads

#### Fields

FirstName, LastName, Company, Email, Status

#### Fallback Meeting Owner

Jeff Woo

#### **Preview Conversation**



#### Let's chat!

Hi there! I'm an Al sales assistant here to help with questions, product information, or scheduling time with a sales representative.

Describe your task or ask a question...



#### **Review and Activate**

You're done! If you are happy with your agent, go ahead and activate the agent!

This agent is activated, but is not live on your website yet. In order to do this, we will have to connect Agent to your Website via Runtime





1 agent user • Test Agent

O Configure Data for Your Agent

0 data sources uploaded

Manage the data your agent will use to answer questions. In Agentforce Data Library Setup, select or create a data library, then add at least one data source.

2

Build and Manage Agents

1 active agent, 0 inactive agents

Connect Your Agent to a Messaging Channel

Let customers chat with your agent through an Enhanced Chat channel. During setup, when prompted for a Fallback Queue, select MIAW Queue.

Learn More in Help

Configure an In-App or Web Deployment Optional

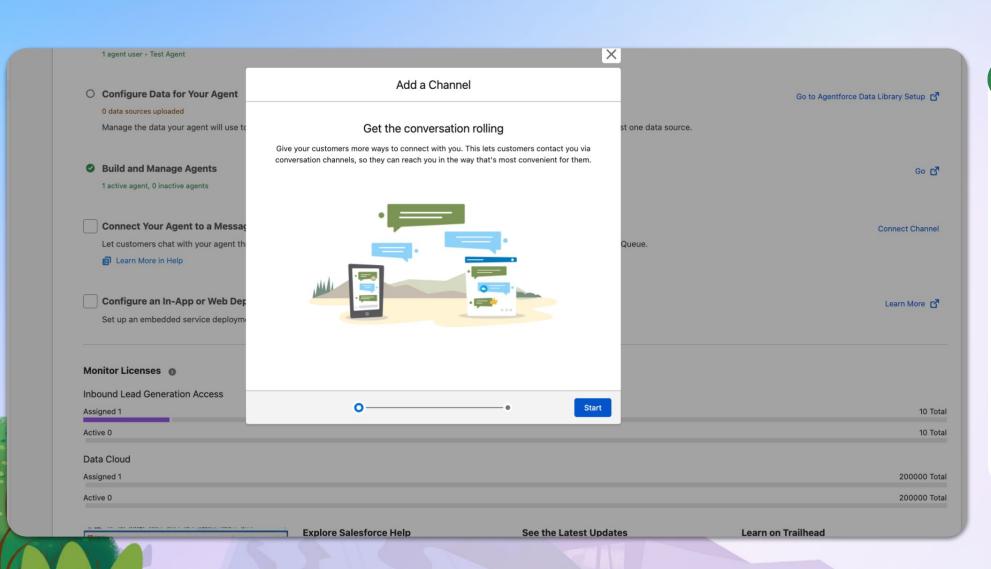
Set up an embedded service deployment so that your messaging channel appears on your app or website.



### Turn agent on for your website

Return back to Salesforce Go → Inbound Lead Generation to go live on a Website.

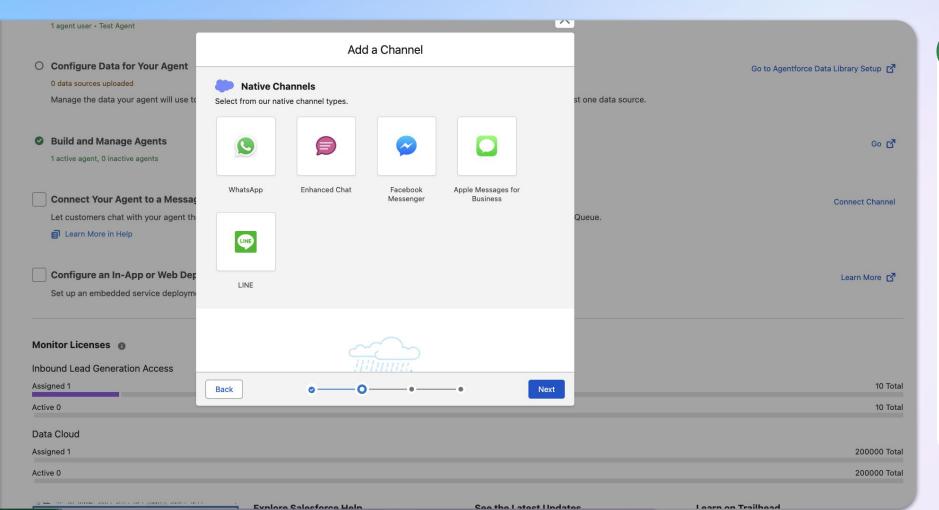
First click on the "Connect Channel" link under "Connect your Agent to a Messaging Channel" section





### Turn agent on for your website

Click Start in the new pop-up

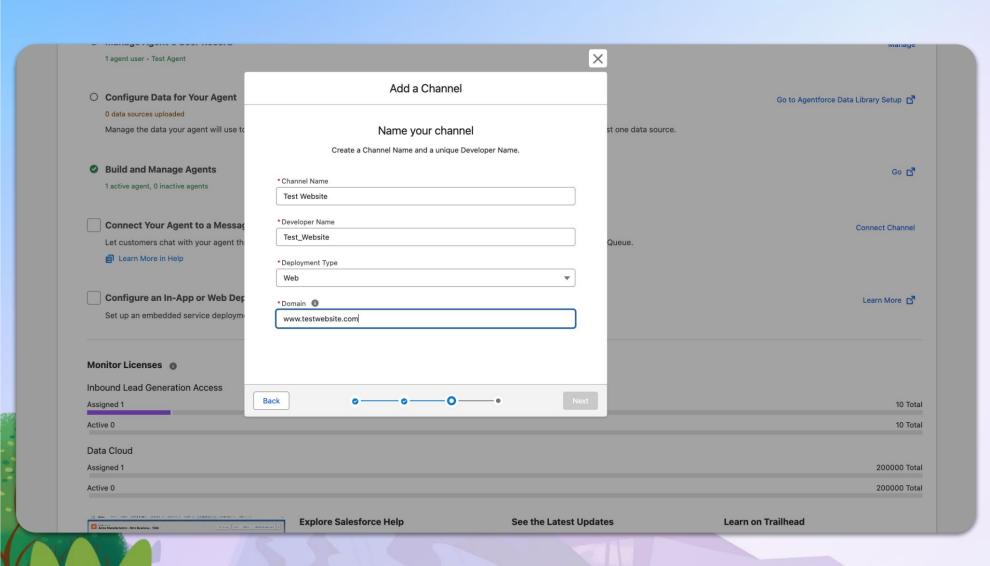


Can the I start I Indates



#### Turn agent on for your website

Choose "Enhanced Chat"

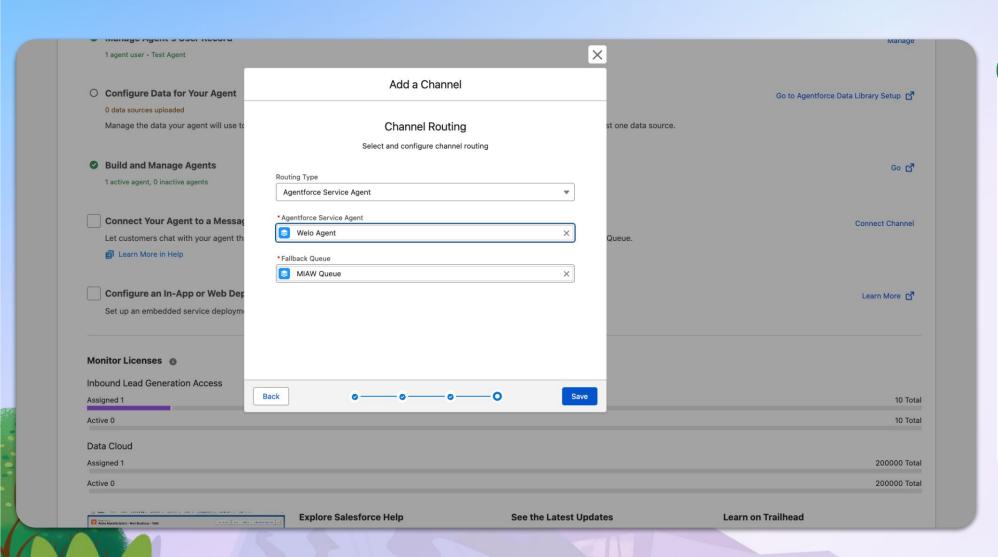




### Turn agent on for your website

Choose whatever Name you want for your website. Choose "Web" as Deployment type. Type in your Domain of your website.

If you are using Experience Cloud, instead type in your Experience Cloud URL. For more information on Experience Cloud, click here.

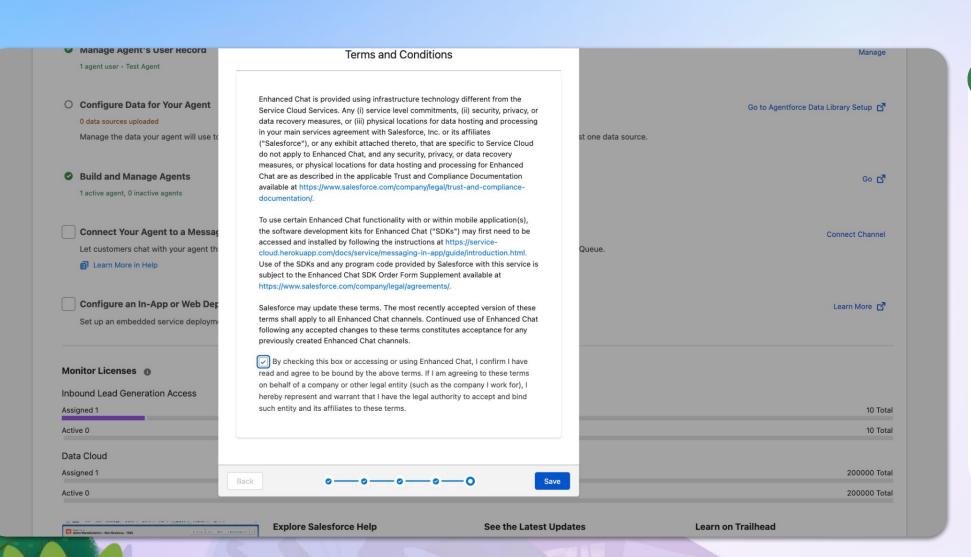




#### Turn agent on for your website

Select "Agentforce Service Agent" routing. Choose the name of the Agent that you created previously in this guide.

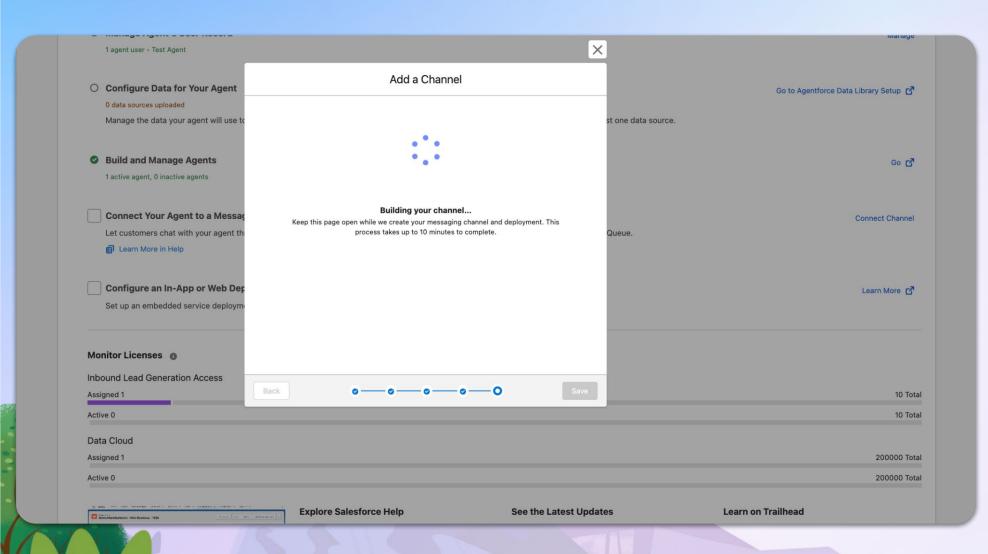
Choose "MIAW Queue" for the Fallback Queue. We created this for you automatically within Go.





#### Turn agent on for your website

Approve the terms and conditions and click "Save"





### Turn agent on for your website

Wait for your web channel to be created. It will take a few minutes.

- Q embedded ser
- Feature Settings
  - Service
    - **Embedded Service**

Channel Menu

#### **Embedded Service**

Deployments

**Enhanced Chat User** 

Verification

Legacy Web Chat

Migration (Beta)

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

#### **Inbound Lead Generation**

5 of 6 Steps Completed

Engage inbound prospects across your chat and messaging platforms. Convert interest into meeting

- Turn On Email Productivity
- Turn On Omni-Channel



#### Turn agent on for your website

Go to Settings → Embedded Service Deployments.

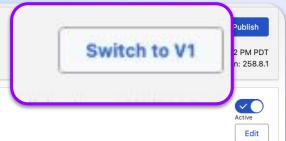
After going through the previous steps, you will have created a Web channel automatically tied to your agent. Last step is embedding it on your website



. > EMBEDDED SERVICE > WELO\_WEB\_AGENT\_CHANNEL\_ACTIVE

#### **Embedded Service Deployment Settings - Web (v2)**

After you edit a deployment, publish your changes.





#### Welo\_Web\_Agent\_Channel\_Active

Messaging Channel: Welo Web Agent Channel (Active)
Site Endpoint: ESW\_Welo\_Web\_Agent\_Channel\_17600314736351



#### Settings

Choose whether to display "Powered by Agentforce" in the chat footer.

**Edit Settings** 



#### **Custom Labels**

Create custom labels to personalize your visitors' experience.

Set Custom Labels



#### **Branding**

Select colors, fonts, avatars, and a logo to reflect your brand identity in the chat window.

Select Branding



#### **Code Snippet**

Install the embedded code snippet and activate Enhanced Chat on your website.

Install Code Snippet



### Turn agent on for your website

Select your Embedded Service Deployment for your newly created site. It should have a similar name to the Channel Name you defined earlier.

Click the "Switch to V2" Button in the top right to enable the newest chat interface. Here you can see we've already clicked it, because you can always switch back

Afterwards, click "Code Snippet"

... > WELO\_WEB\_AGENT\_CHANNEL\_ACTIVE > CODE SNIPPET

#### Code Snippet - Web (v2)

Add the chat code snippet to the HTML for every web page where you want the embedded service to appear. Optionally, update the <meta> tag code snippet.

#### **Chat Code Snippet**

This code snippet adds the embedded service to your web page. You can customize some of the code parameters.

Paste this code before the closing body tag (</body>) for each web page. Don't place the code in your header.

```
<script type='text/javascript'>
function initEmbeddedMessaging() {
    try {
        embeddedservice_bootstrap.settings.language = 'en_US'; // For example, enter 'en' or 'en-US'
```

#### Copy to Clipboard

#### **Meta Tag Code Snippet**

This code snippet makes your web page responsive, so the web page and the embedded service look good on different devices. If your page is already responsive and has a meta tag, then you might not need to make a

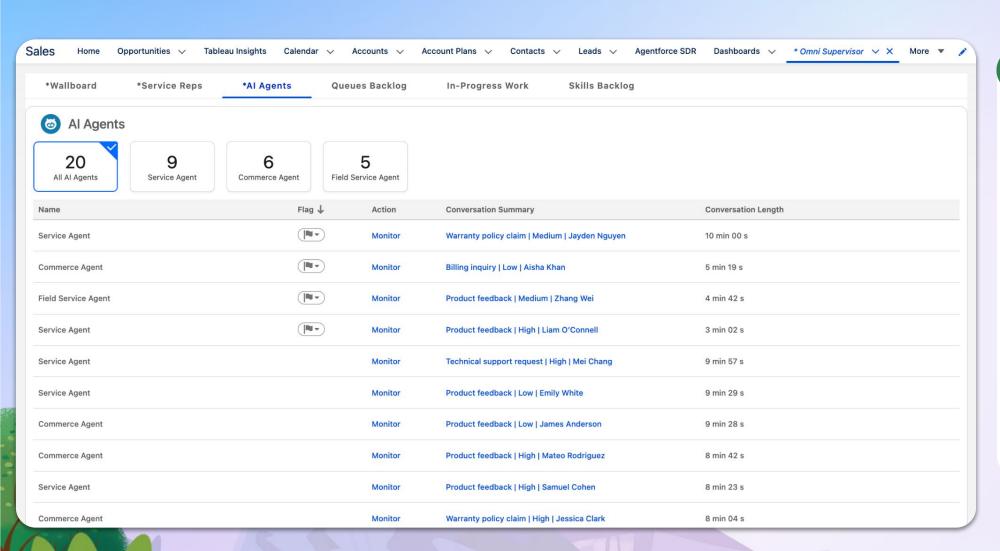
Add this code to the <meta> tag in the head section of each web page where you want the embedded service to be available:

<meta name="viewport" content="width=device-width, initial-scale=1, minimum-scale=1">



### Turn agent on for your website

You are given the code snippet that you can embed onto your website here. Deploy this code onto your site and your agent will be live!





#### Monitor your live agents

Want to see what your agent on your website is up to? Go to "Omni Supervisor" in the App Launcher, and you can go to the "AI Agents" subtab to see them.

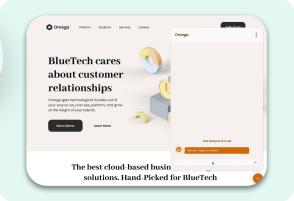
# Agentforce Sales for Lead Nurturing Setup Guide



### How Agentforce Generates & Nurtures Leads



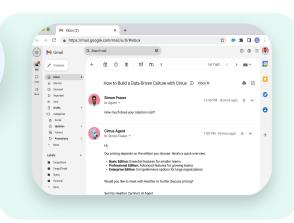




# Generate New Leads on the Web

Expand your existing web agent to capture interest, qualify leads, and book meetings in real-time

**Lead Generation** 

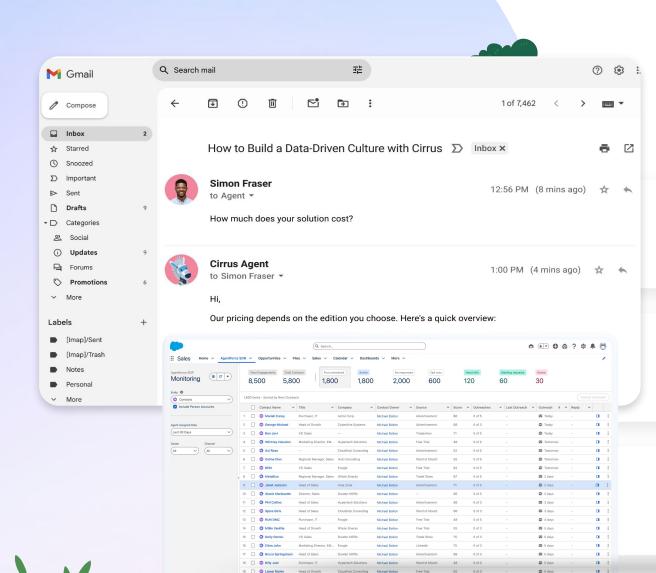


02

# Nurture Leads by Email

Follow up with personalized email outreach, timely responses, and pass qualified leads to sellers

**Lead Nurturing** 



### **Lead Nurturing**

Maximize pipeline by nurturing leads and contacts in a personalized way, 24/7

#### **Engage leads in real time**

Autonomously answer product questions, handle objections, and book meetings

#### Personalize conversations at scale

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



# How Agentforce Nurtures Leads



Starts with...

**Nurture** 

Engage

**Outcome** 

Prospect is Assigned to Agent (Automated or Manual)



Subject: Explore Opportunities with Welo

Hello Jessica,

We noticed your interest in our Atlas Power Supply.

Would you be open to a meeting to learn more?

Agent Nurtures the Prospect with Multitouch Nudges

**Send Nudges** 



Hello Jessica,

Thank you for attending our recent webinar on latest innovations. As you can see, we've made great strides in our power supply units. Perhaps we can find time to connect this week?

**Agent Autonomously Replies** 

Select appropriate response based on lead reply from OOTB capabilities below

**Answer Questions** 

**Book Meeting** 

**Generic Handoff** 

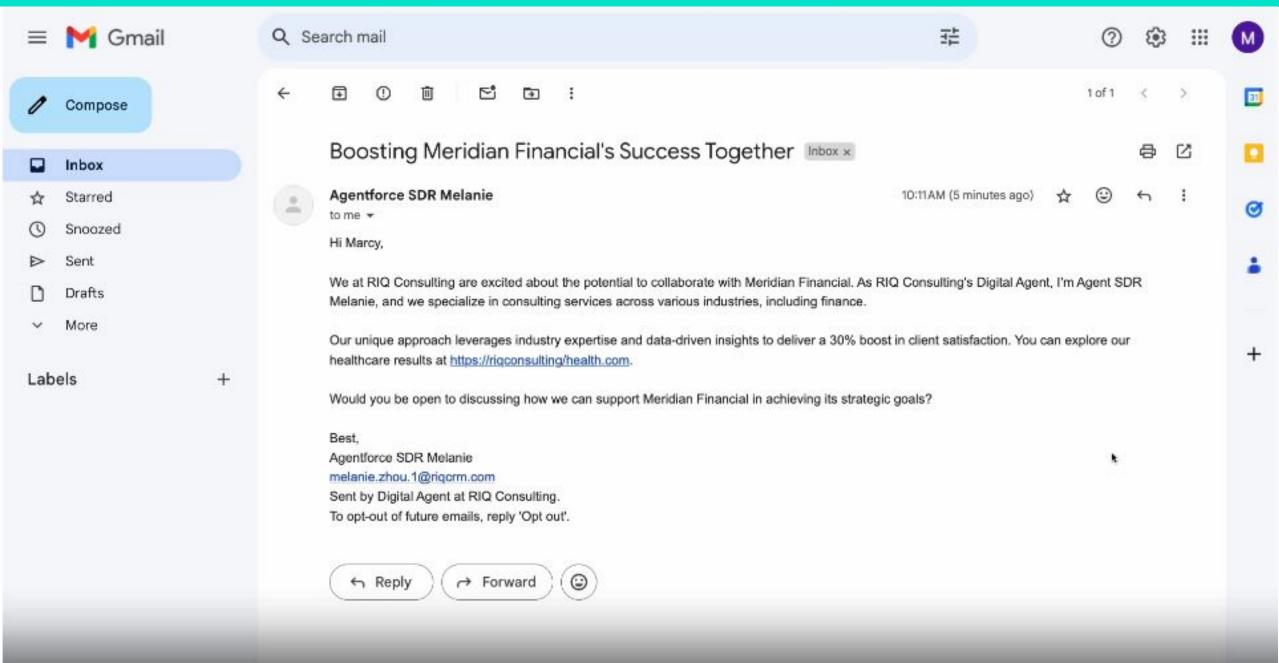
Agent Qualifies the Lead and Books a Meeting





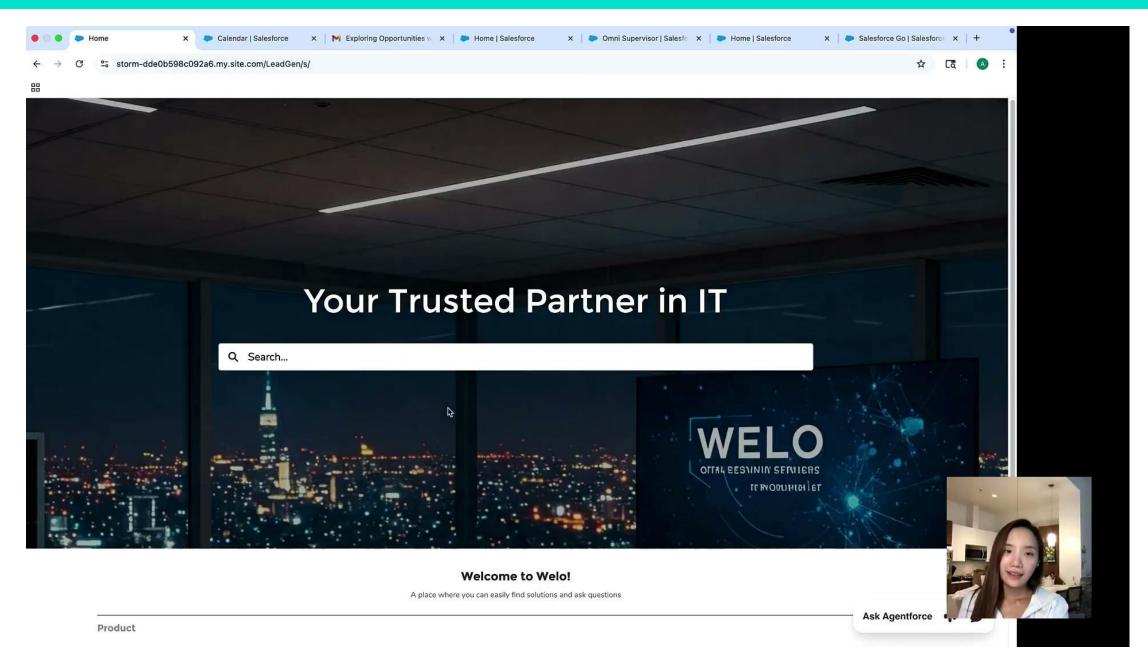
#### Watch the Demo

#### Note: Name has been updated to Lead Nurturing

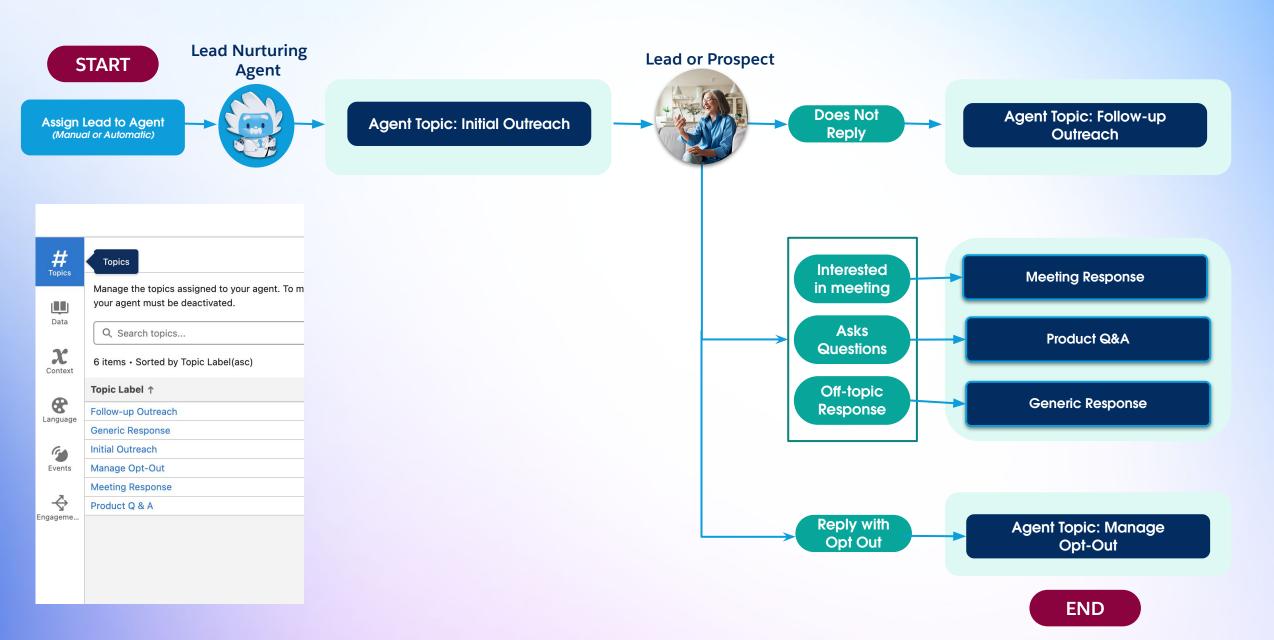




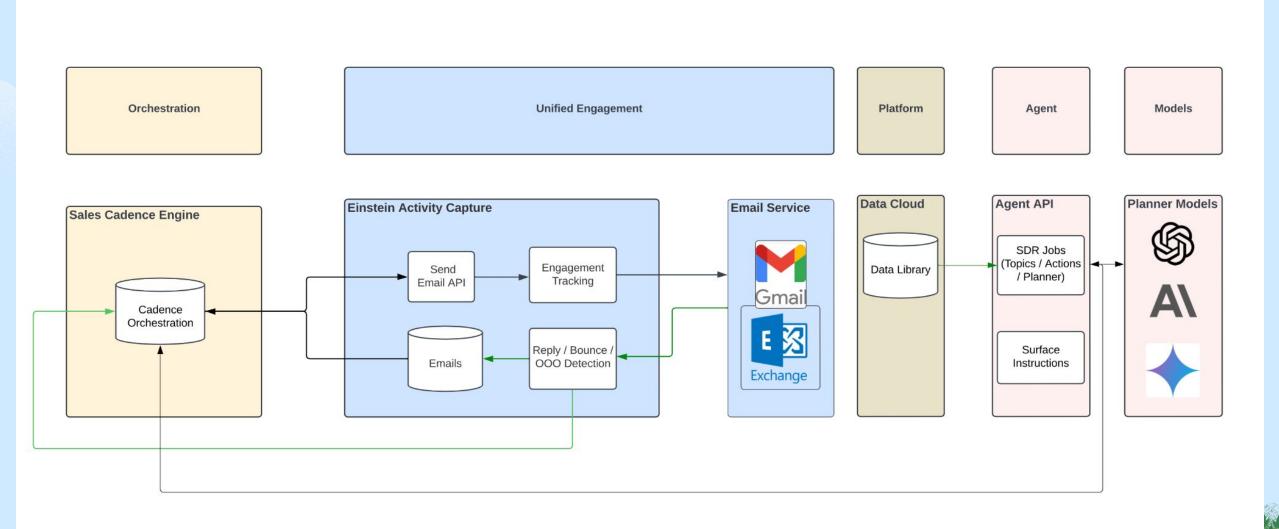
# Agentforce Sales for Lead Gen & Nurturing E2E Walkthrough External Link (TBD)



## **Agent Testing Overview**



# Lead Nurturing Agent High-level Architecture



# Agentforce Sales for Lead Nurturing Topics & Actions

# Topics	Topics			
Data	Manage the topics assigned to your agent. To m your agent must be deactivated.			
244	Q Search topics			
6 items • Sorted by Topic Label(asc)				
	Topic Label ↑			
Language	Follow-up Outreach			
	Generic Response			
6	Initial Outreach			
Events	Manage Opt-Out			
	Meeting Response			
7.	Product Q & A			

Topics	Description	Filters	Actions	Action
Topics	Description	i iiteis	Actions	Туре
Initial Outreach	Write a compelling and engaging business to business initial outreach email to capture new prospects' interest, establish a strong connection, and encourage a response or meeting.	'OrchestrationStag e = "Intro"	Get Record Details	Invocable Action
Follow-up Outreach	Write personalized follow-up nudges for prospects who haven't responded to previous outreach emails.	OrchestrationStage = "Nudge"	Get Record Details	Invocable Action
Meeting	Responds to inquiries from prospects interested in	OrchestrationStage	Get Record Details	Invocable Action
Response	booking a meeting or connecting with the seller.	= "Reply"'	Return Calendar Link	Flow
Product Q&A	Despends to prospect's amail inquiries about products		Get Record Details	Invocable Action
	8	OrchestrationStage = "Reply"	Answer Questions with Knowledge	Standard RAG
			Return Calendar Link	Flow
Manage Opt Out	Responds to prospect requests to opt out of future emails, stop receiving emails, or any other variations that could mean a desire to opt out, stop, and unsubscribe from emails.	OrchestrationStage = "Reply"	Opt Out	Flow
Generic	Responds to prospect's email messages and inquiries	OrchestrationStage		Invocable
Response	that are non-business related and personal.	= "Reply"'	Details	Action

# Agentforce Sales for Lead Nurturing Expected Behavior

Agent_Actions_Exped	:ted ~			I					
Agent Topic/Actions	Actions Associated ×	What Triggers It? ∨	What Happens Next? (OOTB Behavior)	Is the Lead Owner CC'd on the email?	~	⊡ is RAG v	Disposition Value (Used primarily for analytics)	Expected Behavior V	Action Sequence
Initial Outreach  SDR Email: To	Get Record Details	Manual activation on the prospect record and/or prospect meets Engagement Rules criteria	Agent sends an initial outreach email as soon as possible after activation.	No	*)	No 🔻	N/A	If the email is scheduled outside the agent's working hours, sends at the first available time within working hours.  Sign-off disclosure included (but not visible in Activity Timeline).	Get Record Detail
Follow Up Outreach SDR Email: To	Get Record Details	Prospect has not replied to any SDR emails (initial outreach and follow ups)	The follow-up email instantly generates after the Initial Email is sent and sits on the Activity Timeline. Follow up email is sent 1 day after initial outreach is sent.	No	*)	No 🔻	N/A	If customer replies, the follow-up email will be replaced by a reply email on the Activity Timeline . The Agent will continue to follow-up until a meeting is booked. Number of nudges limited by "Maximum Number of Nudges" setting. Email is sent based on the "Time Between Attempts" set in Engagement Rules (default 1 day)	Get Record Detail
Follow Up Outreach (Last Nudge)	Get Record Details	Prospect has not replied to any SDR emails (initial outreach and follow ups)	Final Follow Up will include the owner's email in the email body.	No	•	No 🕶	N/A	Same behavior as above. No additional emails will be sent after the final nudge.  The meeting link is embedded in the final nudge.	Get Record Detail, Return Calendar Link, Get Record Detail (if inbox disabled)
Product Q&A (+ meeting)	Get Record Details Answer Questions with Knowledge Return Calendar Link	Lead asks a question related to uploaded files (using RAG) and says "Let's book a meeting" or "I am interested."	Agent sends the email as soon as possible after the LLM generates the response message.  If Salesbox Inbox is enabled, the email includes a meeting link. If not, email only includes the lead owner's email.	Yes	•	Yes 🔻	MeetingRequested  If max reply is hit, disposition value updated to CustomerConnected  If meeting is booked, disposition value updates to MeetingBooked("MB", "Meeting Booked");	Lead owner is cc'd on the email. 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.  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.	Get Record Detail, Answer Questions with Knowledge, Return Calendar Link, Get Record Detail (if inbox disabled)
Generic Response	Get Record Details	Lead says "Interested, but not now" or asks random questions that are off-topic that cannot be addressed with uploaded files (RAG)	The SDR agent says the lead owner is the best person to answer the question, and suggests a meeting with the seller.	Yes	•	No 🔻	CustomerConnected("CC", "Customer Connected")	If Salesbox Inbox is enabled, the email includes a meeting link. If not, email only includes the lead owner's email.	Get Record Detail
Meeting Response	Get Record Details Return Calendar Link	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.	Yes	*)	No 🔻	MeetingRequested  If max reply is hit, disposition value updated to CustomerConnected  If meeting is booked, disposition value updates to MeetingBooked("MB", "Meeting Booked");	If Salesbox Inbox is enabled, the email includes a meeting link. If not, email only includes the lead owner's email.	Get Record Detail, Return Calendar Link, Get Record Detail (if inbox disabled)
Manage Opt Out	Opt Out	Lead says "Not interested."	No further email is sent to the user after the Email Opt-Out field is updated	No	*)	No ▼	OptOut("O", "Opt Out"),	Opt out flow marks Email Opt-Out field on the lead record as TRUE	Opt Out

# Identifying Your Use Case Fit



### Lead Nurturing 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?	~	X		
Digital Channels	Do you currently use or will you be using <b>email</b> to engage with leads or prospects?	~	×		
	Can you provision a dedicated email for the Lead Nurturing Agent?	<b>/</b>	X		
Draduat	Do you currently use or are you willing to use <b>Einstein Activity Capture</b> ? And are you comfortable with emails being captured and stored on Hyperforce and AWS? Considerations for using EAC	~	X		
Product Supporting Features	Are you currently <u>not</u> using <b>Activity 360</b> ?	~	X		
reditiles	Do you currently use or are you willing to use <b>Salesforce Inbox</b> OR a third-party booking system to <b>schedule meetings</b> between leads, prospects, and sales reps?		X		
Sandbox Readiness	Is Data Cloud properly enabled in your Sandbox environment?				

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

# **Launchpad Checklist**





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

Ensure Your Organization is Agent Ready

#### Inbox (Optional)

- Enable Inbox permissions for the sellers on whose behalf Agentforce will be booking meetings if using Salesforce's out-of-the-box scheduling capability.
- 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 <u>Considerations for using EAC</u>
- EAC will be configured automatically when setting up your Sales Agent.

#### 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

# **Lead Nurturing Required Features**



Feature	Feature SKU Name		Lead Nurturing Agent uses the feature to:	
Einstein Activity Capture (EAC)		Agentforce* -and/or- Salesforce Foundations - Entitlement	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.	
Automated A	<u>actions</u>	Agentforce* -and/or- Salesforce Foundations - Entitlement	Add, remove, and manage leads or prospects in outreach cadences.	
Salesforce Inbox (Optional)  Data Cloud - Retrieval Augment Generation (RAG)		Agentforce* -and/or- Salesforce Foundations - Entitlement	Generate a personalized meeting booking link on behalf off the seller. Salesforce Inbox is only required to use Salesforce's out-of-the-box Scheduling capability. If using an external meeting link, Inbox is not required.	
		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.	

<sup>\*</sup> Need to ensure Data Cloud is properly enabled in Sandbox Environment. See <u>Data Cloud Missing from Sandbox Env</u> for more information.

# **Lead Nurturing Permissions**



	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	<ul><li>Configure Agentforce SDR Agent</li><li>Data Cloud User</li></ul>	Allow sales manager to view and configure the SDR Agent in Ager Builder, manage, and deploy SDR Agent for prospect outreach	
Sales User	<ul> <li>Use Agentforce SDR Agent</li> <li>Inbox Perm         <ul> <li>Inbox With Einstein Activity Capture is recommended (see slide for more details)</li> </ul> </li> </ul>	Allow sales users to access and interact with Agentforce SDR, and send leads to SDR Agent	

## **Implementation Guide Overview**

Enable Agentforce for Sales

Enable required
features and
complete
prerequisite setup
steps

Time: 5 mins

2 Create and Test

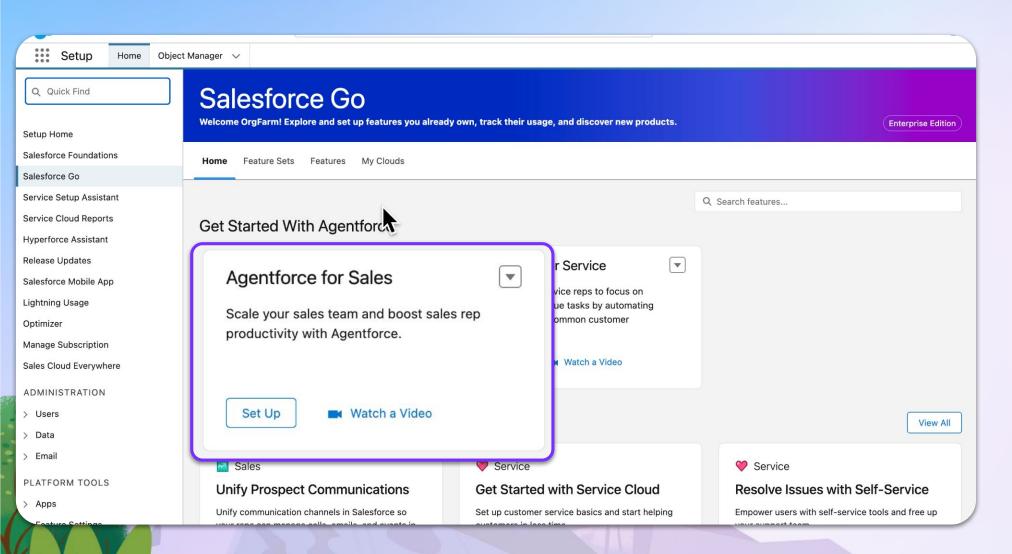
Simple No-Code Agent Creation and Testing

Time: 5-7 mins

3 Runtime & Monitoring

Monitor your agent activity and outcomes

Time: 3-5 mins

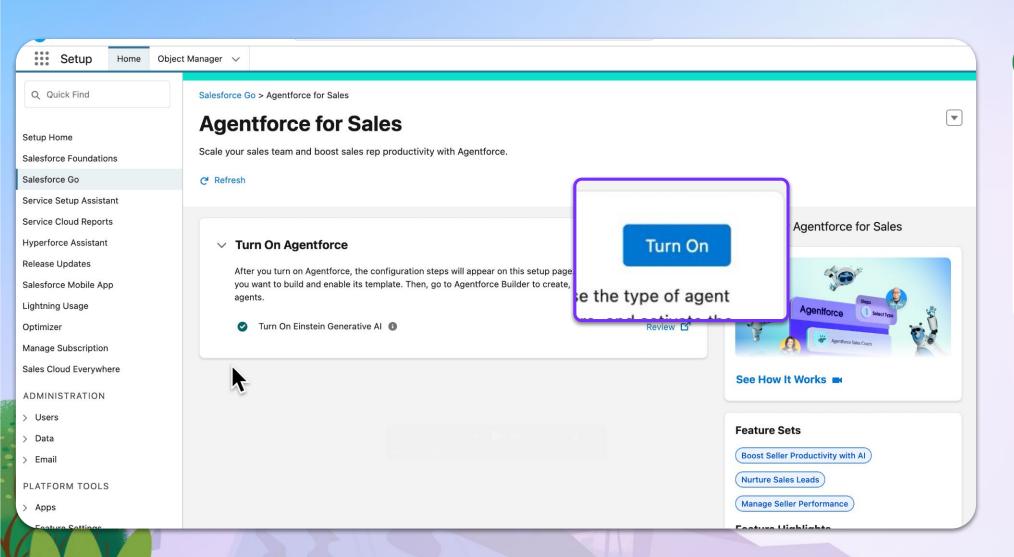




# Discover Agentforce for Sales in Salesforce Go

Find Salesforce Go in Setup.

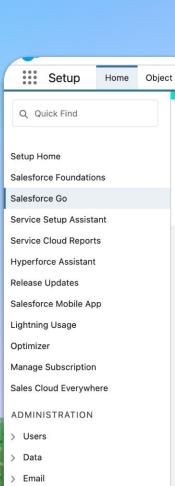
Discover Agentforce for Sales in Go Home.





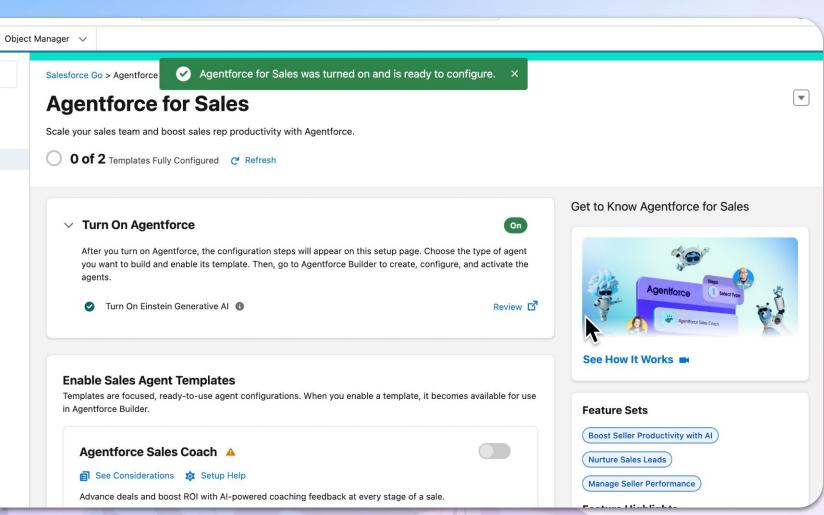
Discover Agentforce for Sales in Salesforce Go

Turn on Agentforce.



PLATFORM TOOLS

Apps

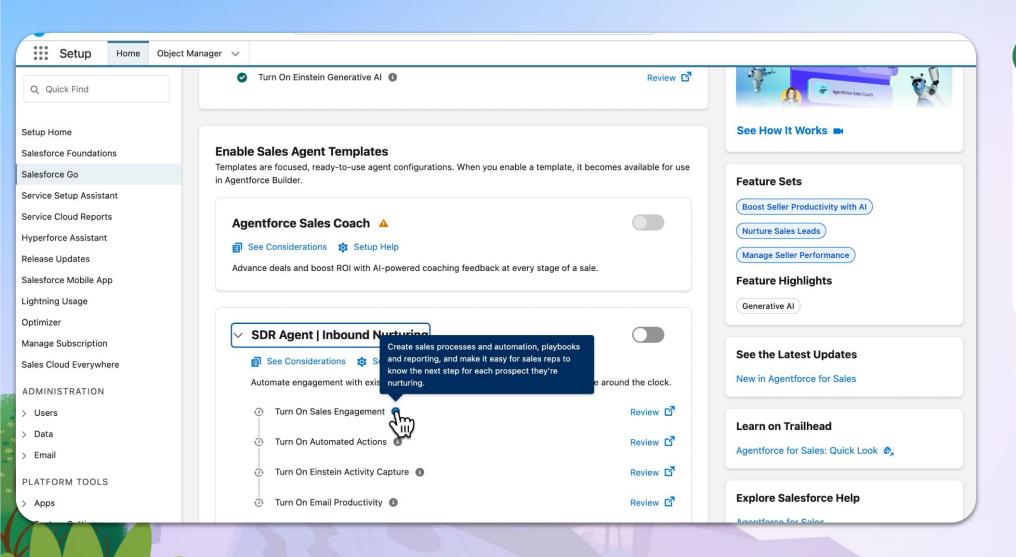




# Discover Agentforce for Sales in Salesforce Go

Verify that Agentforce is on.

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

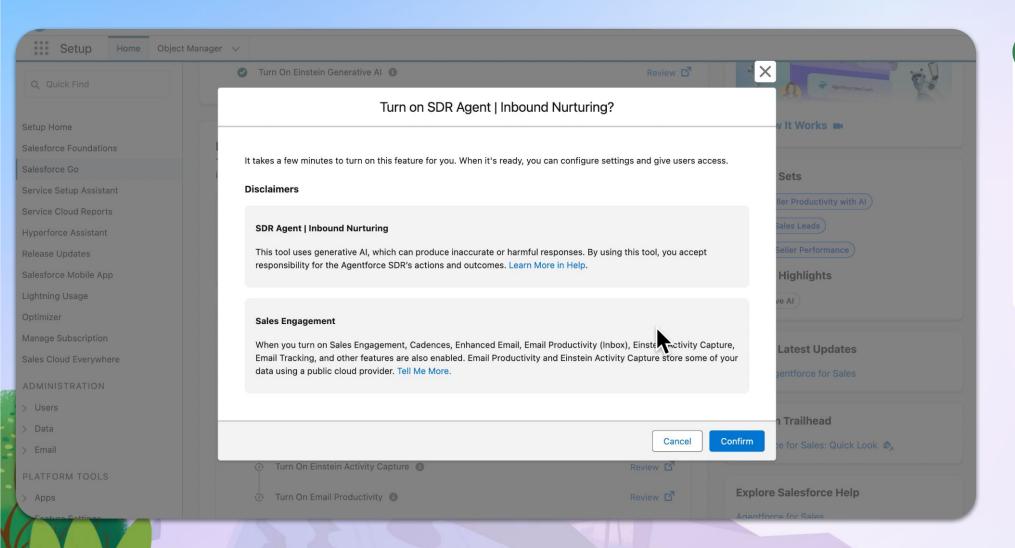




# Activate Sales Agent for Lead Nurturing

Turn on Sales Agent for Lead Nurturing.

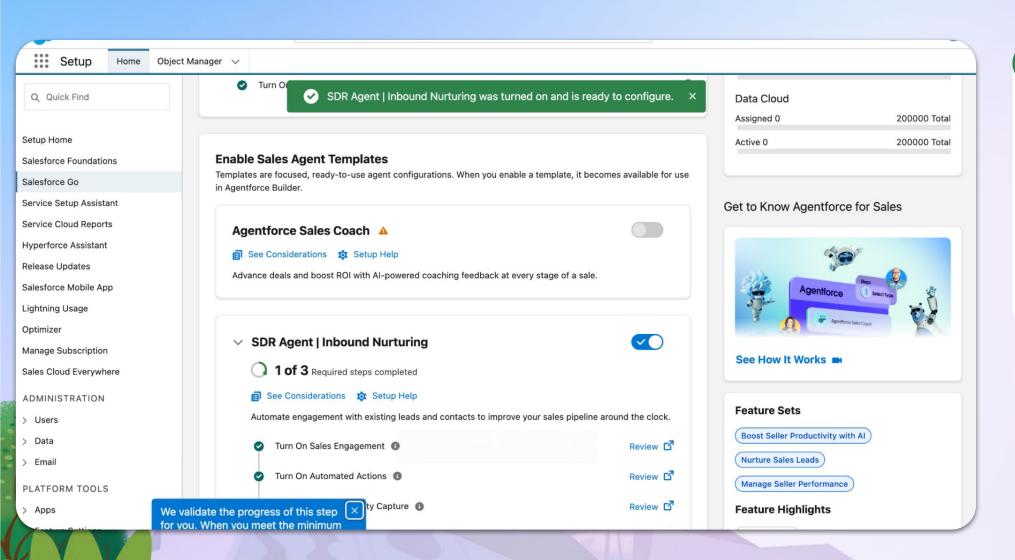
View all features that will be turned on automatically.





# Activate Sales Agent for Lead Nurturing

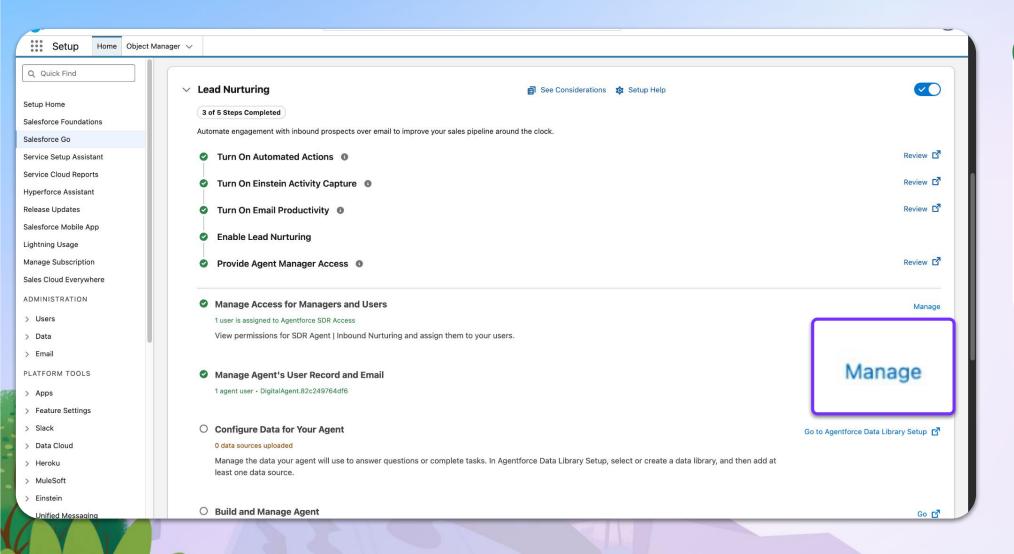
Review the disclaimers before feature activation.





# Activate Sales Agent for Lead Nurturing

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

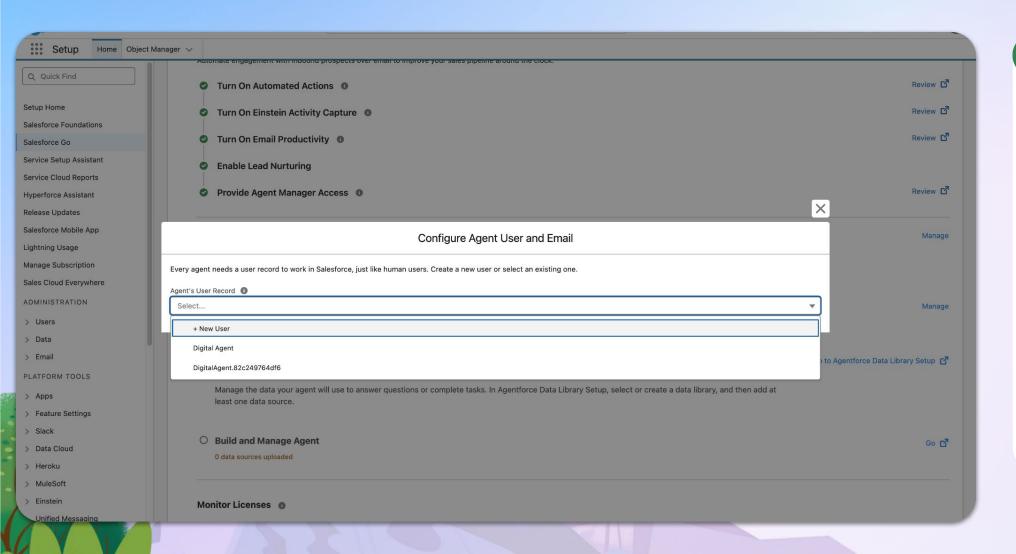




# Manage Agent's User Record and Email

Give users access to Sales Agent for Lead Nurturing.

Click 'Manage'.

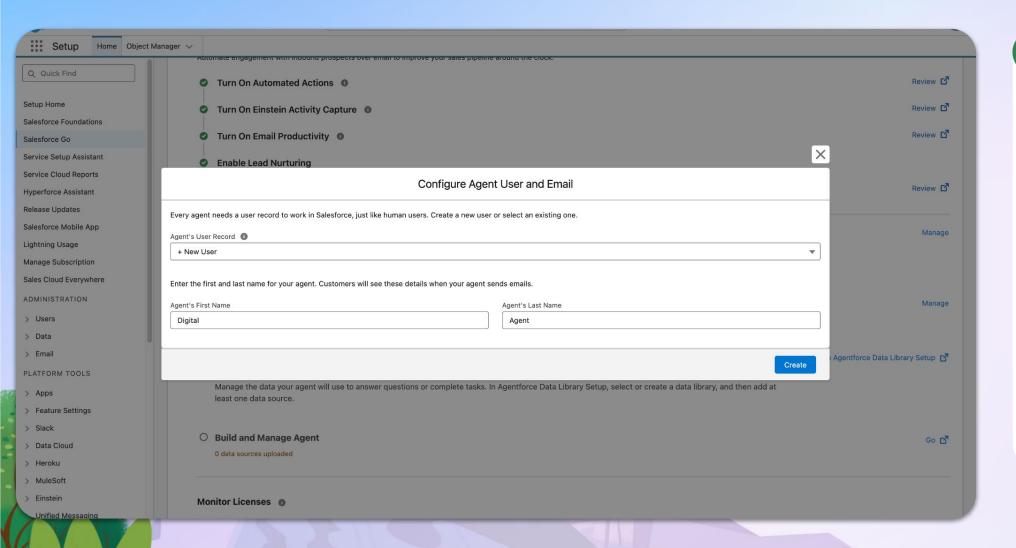




Like human users, agents need a user record in Salesforce, along with an associated email address.

Select an existing Agent User Record or

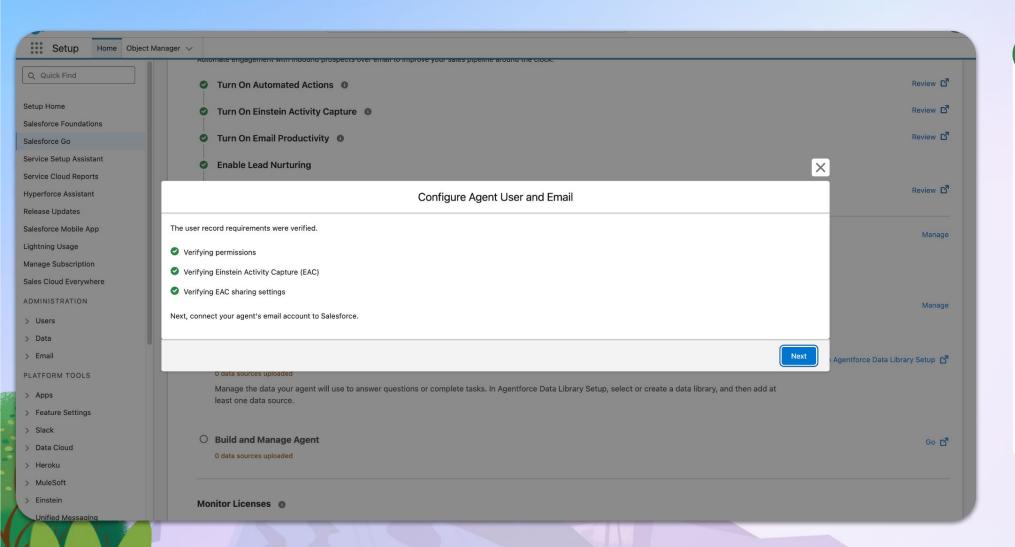
select '+ **New User**' to create a new User Record.





Enter the first and last name for your agent. Customers will see these details when your agent sends emails.

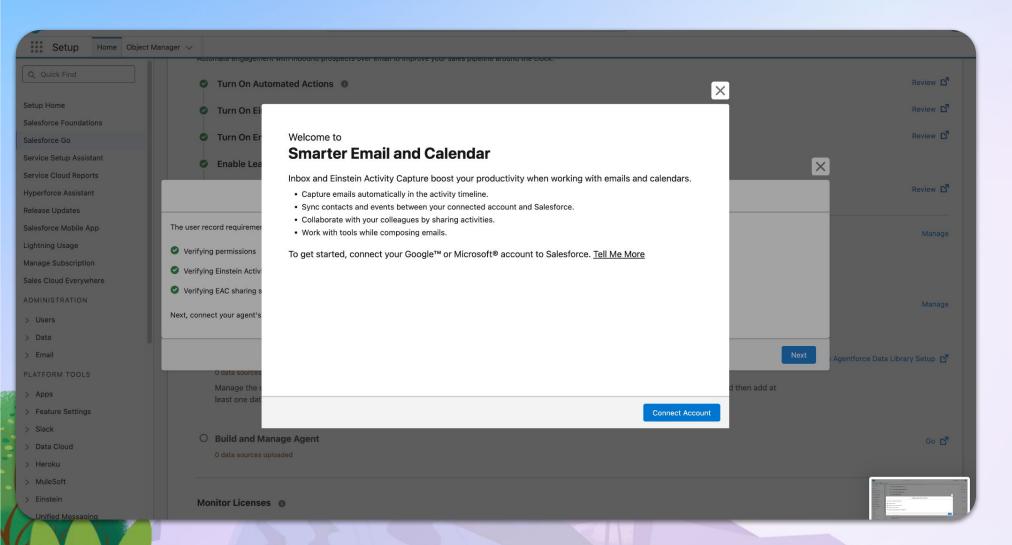
Click 'Create'.





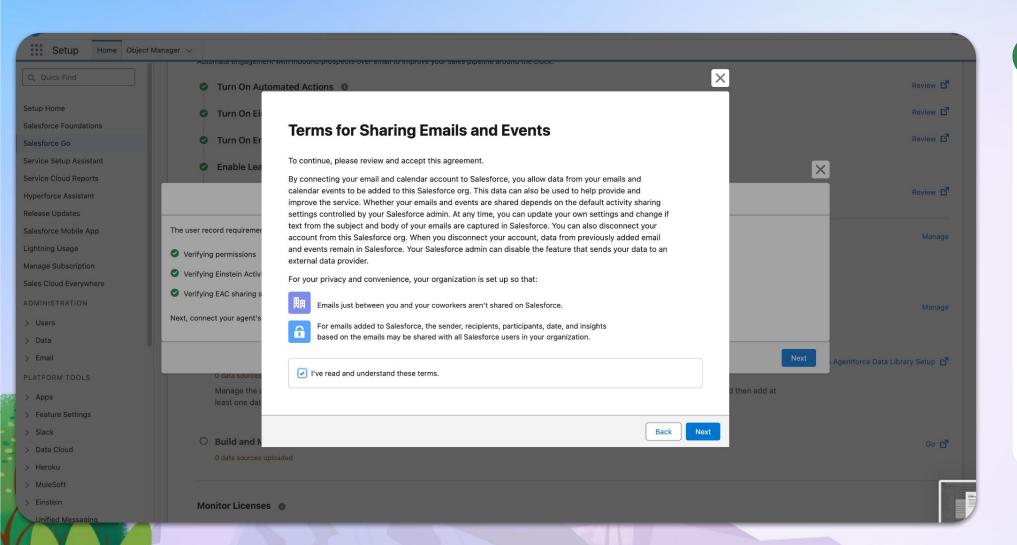
To ensure your agent has adequate permissions, a few user requirements will be verified. Next, we'll connect your agent's email account.

Click 'Next'.





Click 'Connect Account'.

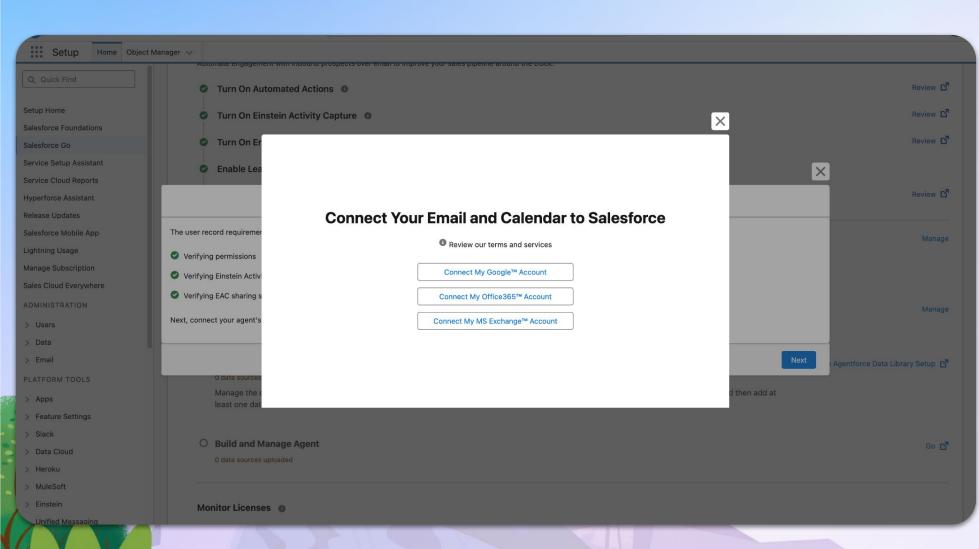




Before continuing, review and accept the agreement for sharing emails and events.

Click the checkbox to accept the terms, then click 'Next'.

2

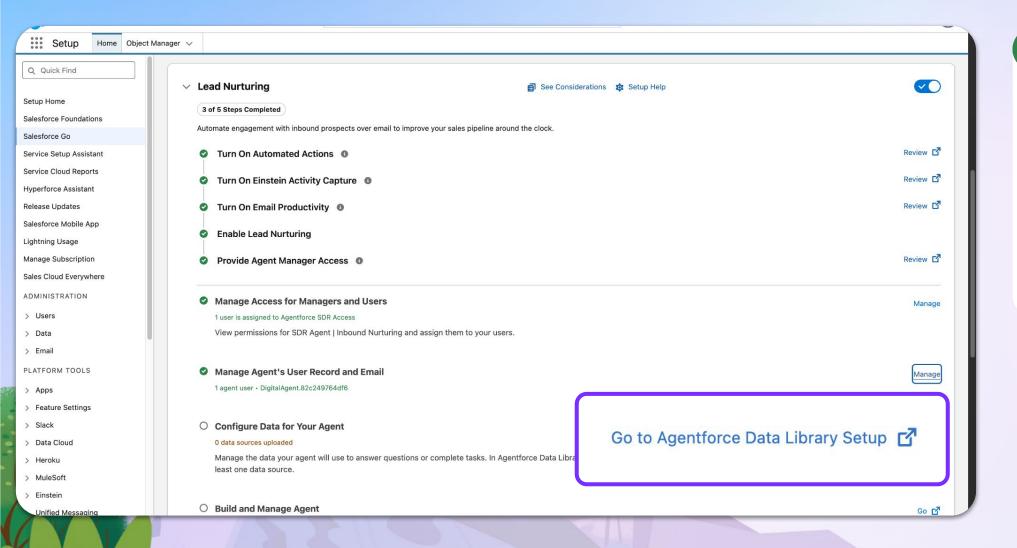




# Create or Configure Agent User and Email

Select the preferred Email and Calendar provider to open a new window with additional configuration steps before finishing the Agent User setup.

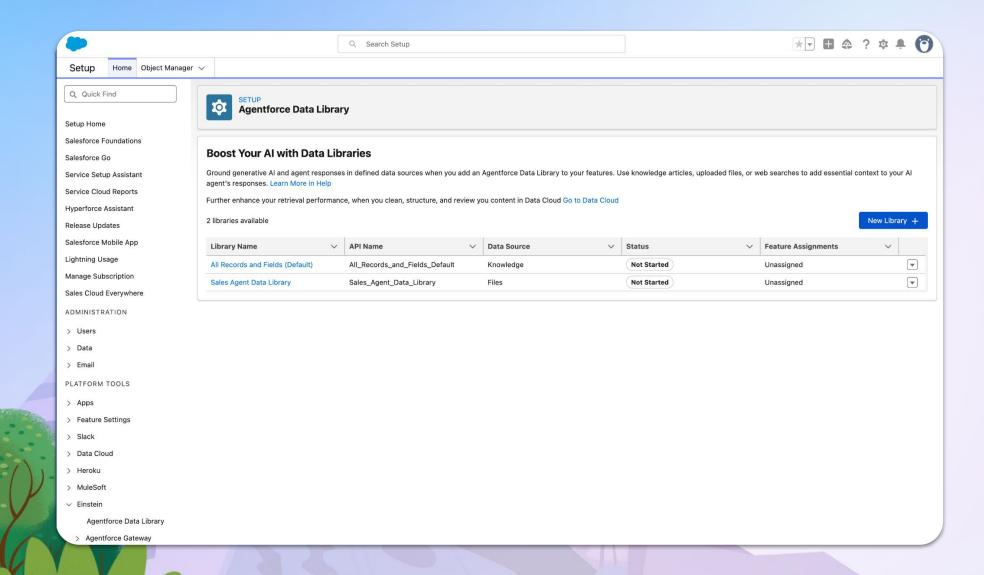
Salesforce Help: Assign Agentforce User Permissions for Lead Nurturing
Salesforce Help: Lead Nurturing Agent Permissions Sets





Manage the data your agent will use to answer questions or complete tasks

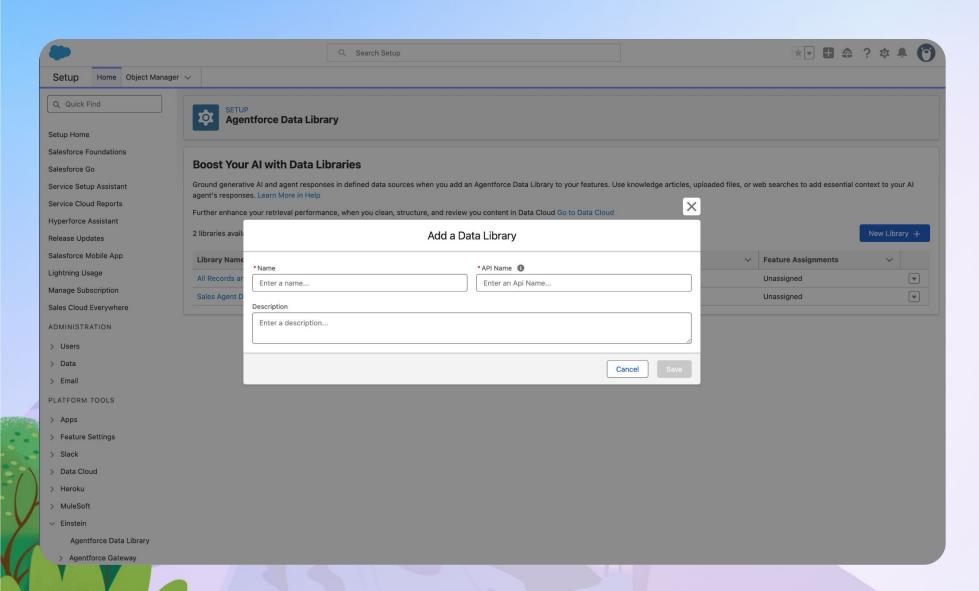
Click 'Go to Agentforce Data Library Setup'.





Your Sales Agent can use 'Retrieval Augmented Generation' to provide accurate answers or complete tasks efficiently.

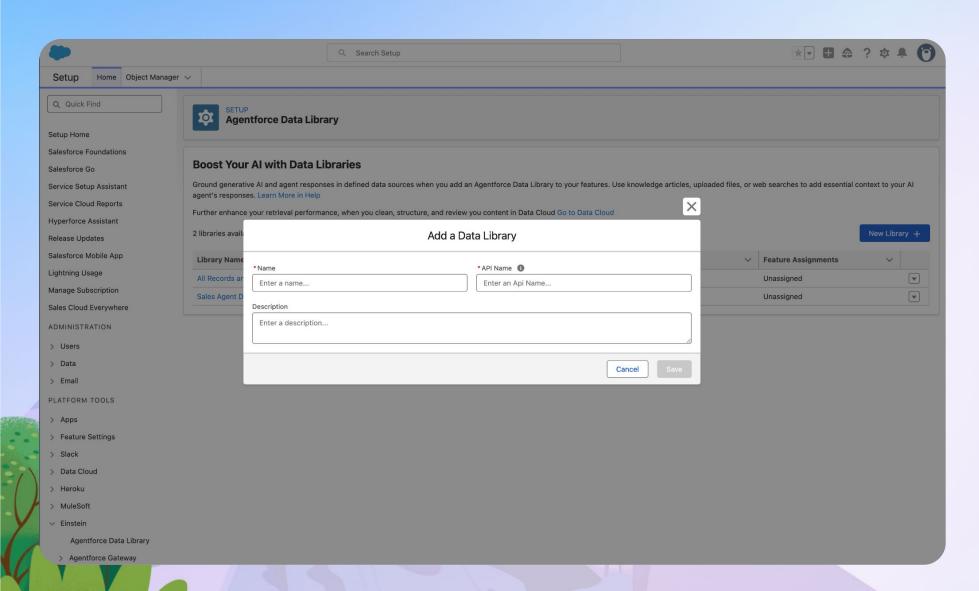
Click 'New Library'.





Define your Name and Description for the new Data Library

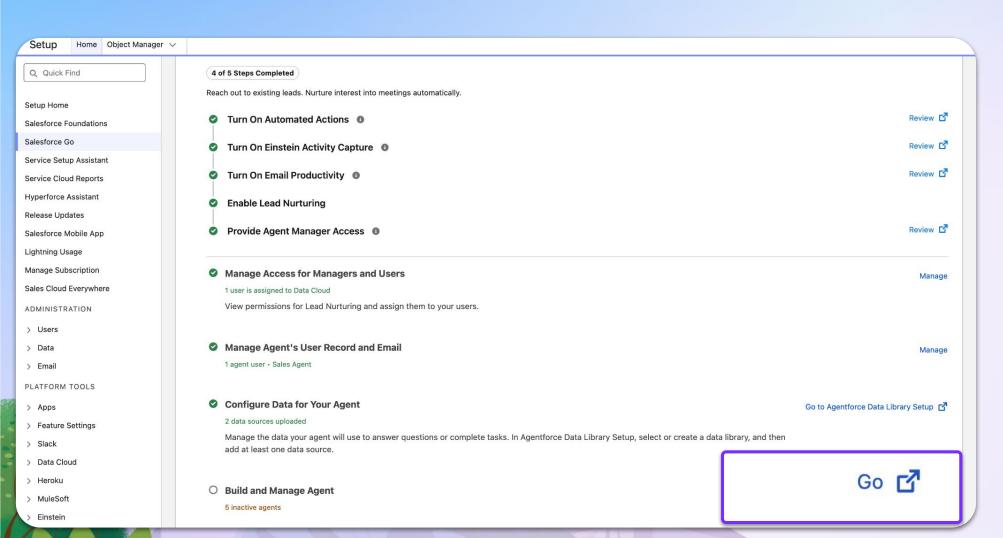
Click 'Save'.





Define your Name and Description for the new Data Library

Click 'Save'.





### 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.



#### **Build and Manage Your Sales Agents**

Access the agents you've created here. Click an agent to view, edit, or continue building it. Or build a new agent. To see all agents, including those created elsewhere, go to Agentforce Builder.

Q Search agents...

♦: Build a New Agent

Agent Name ↑	Туре	Status	Agent User Record	Last Modified	Created By
Bryan's Welo Agent	Lead Nurturing	Inactive	Welo Sales Agent	Oct 14, 2025	Ziggy PM
<b>Event Invitation Agent</b>	Lead Nurturing	Inactive	Welo Sales Agent	Oct 13, 2025	Ziggy PM
Meeting Scheduling Agent	Lead Nurturing	Inactive	Welo Sales Agent	Oct 13, 2025	Ziggy PM
Onboarding Agent	Lead Nurturing	Inactive	Welo Sales Agent	Oct 13, 2025	Ziggy PM
Renewals Agent	Lead Nurturing	Inactive	Welo Sales Agent	Oct 13, 2025	Ziggy PM
Test	Inbound Lead Generation	Inactive	Web Agent	Oct 1, 2025	Shashank Tejura
Test Welo Agent [Archived]	Inbound Lead Generation	Inactive	Welo Sales Agent	Oct 11, 2025	Ziggy PM
Welo AMER Agent	Lead Nurturing	Active	Welo Sales Agent	Oct 2, 2025	Ziggy PM
Welo Sales Agent Archived	Inbound Lead Generation	Inactive	Welo Sales Agent	Oct 3, 2025	Ziggy PM
Welo Sales Agent EMEA	Lead Nurturing	Inactive	Welo Sales Agent	Oct 9, 2025	Ziggy PM
Welo Web Agent	Inbound Lead Generation	Active	Welo Sales Agent	Oct 3, 2025	Ziggy PM
Winback Agent	Lead Nurturing	Inactive	Welo Sales Agent	Oct 13, 2025	Ziggy PM
[Archived] Web Test	Inbound Lead Generation	Inactive	Welo Sales Agent	Oct 14, 2025	Ziggy PM
tact	Lead Nurturina	Inactiva	Waln Salas Anant	Oct 14 2025	7iaav PM



### **Build a New Agent**

Simplified Creation Experience allows for fast and no-code agent setup.

To create a new Agent, click 'Build a New Agent'.











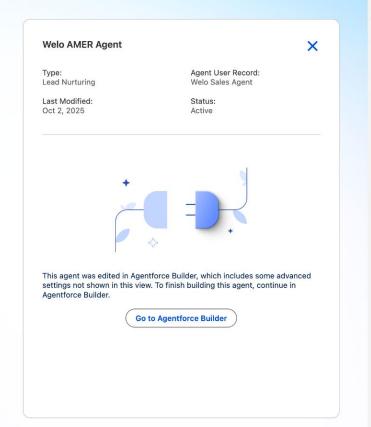
Q Search... Tableau Insights Calendar V

#### **Build and Manage Your Sales Agents**

... Agentforce Sales

Access the agents you've created here. Click an agent to view, edit, or continue building it. Or build a new agent. To see all agents, including those created elsewhere, go to Agentforce Builder.

Q Search agents					+: Build a New Agent
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Winback Agent	Lead Nurturing	Inactive	Welo Sales Agent	Oct 13, 2025	Ziggy PM
[Archived] Web Test	Inbound Lead Generation	Inactive	Welo Sales Agent	Oct 14, 2025	Ziggy PM





Any agent created through this new experience can be edited if the following conditions are met:

- Agent is not edited outside of this experience (ex. in Builder or NGA)
- Agent is deactivated

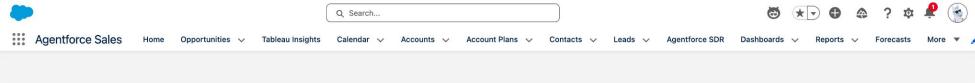
If not, you will see a link to edit the agent in Builder.







Runtime Monitoring





### Sales Agent Configuration: Select Agent Template

Choose the agent template you want to create. Select 'Lead Nurturing', then click 'Continue'.

If you don't see the template, the necessary prerequisites are not yet turned on in Go. Go back to Salesforce Go to make sure the feature is enabled properly.

#### **Select an Agent Template**

Pick the template that best fits the job you want this agent to do. Each one comes with tailored topics and actions.

Lead Nurturing

Reach out to existing leads. Nurture interest into meetings automatically.

10 Agents Available

Inbound Lead Generation

Engage inbound prospects across your chat and messaging platforms. Convert interest into meetings automatically.

72 Agents Available

Back

Continue

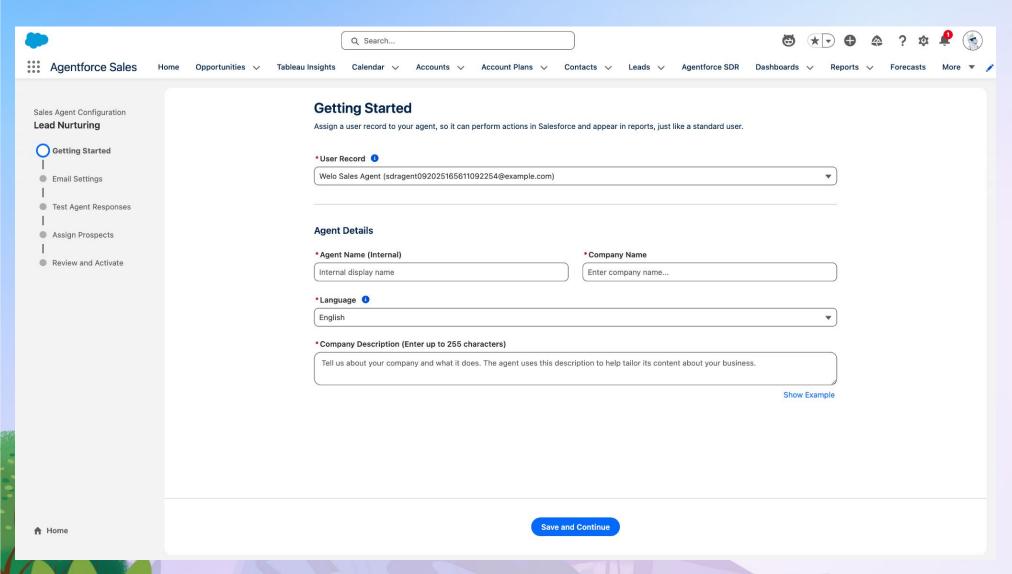




# **Create and Configure**





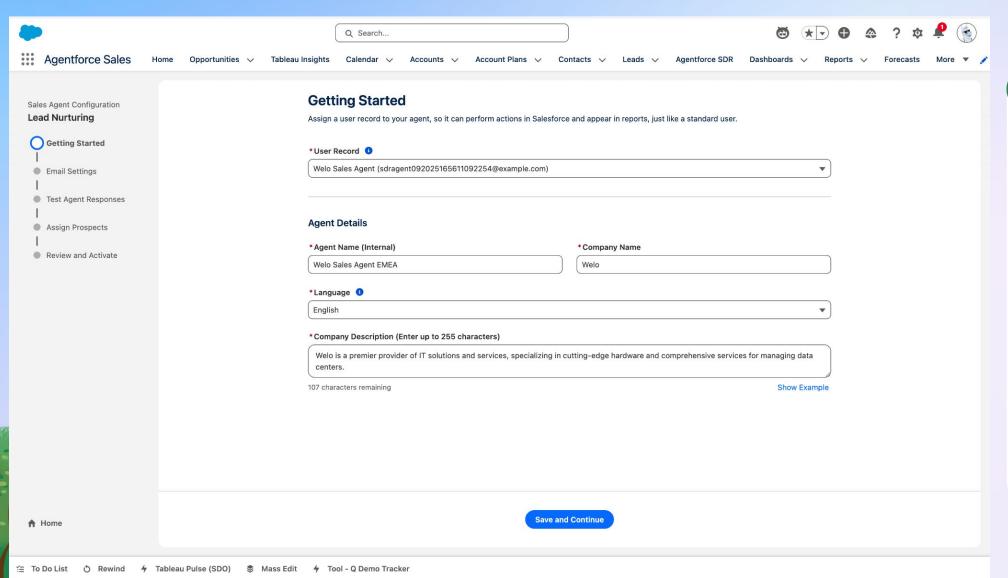




# **Getting Started**

To get started, select the appropriate user record for this agent. The drop down to select user records should only show user records with the appropriate user perms associated.

If you don't see the desired user record to configure the agent with, go back to Salesforce Go user creation and setup step to make sure the user record is **verified**.





### **Getting Started**

Fill out the remaining details as desired.

The Agent Name field is the "internal name" that will not be shown in emails or any external engagement. We recommend you to create unique internal names to differentiate between multiple agents of the same type.

Select the company name, default language, and company description. This information will be used by the agent to further personalize the emails.



4 Tool - Q Demo Tracker

To Do List

Rewind

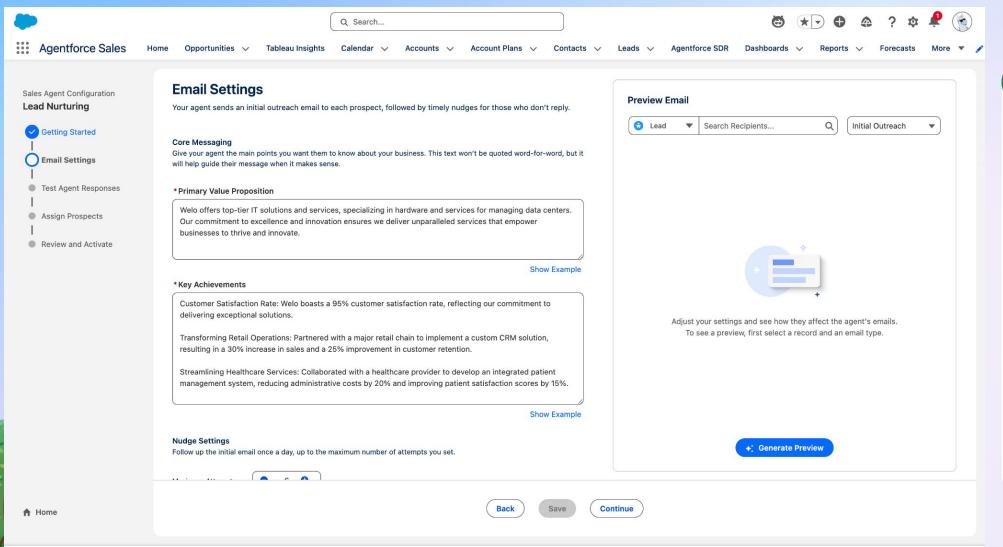
♠ Tableau Pulse (SDO)

Mass Edit





**Runtime Monitoring** 



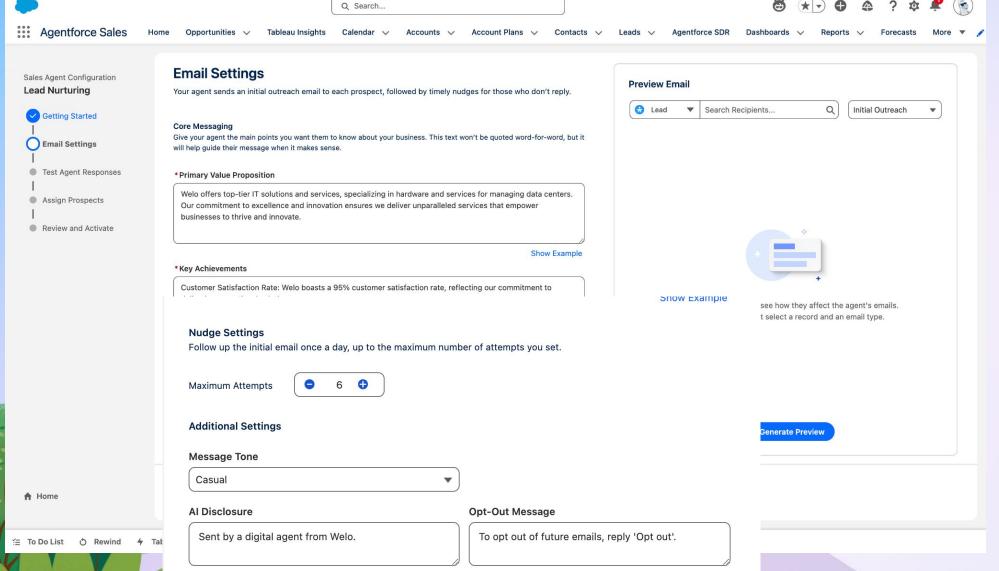


# **Email Settings**

This is the core of personalizing your agents. Provide the agent with details on the primary value proposition and proof points such that the agent will use the information appropriately.

See the examples for reference and adapt based on your company information.

These values will be stored and translated to topic instructions for the agent.



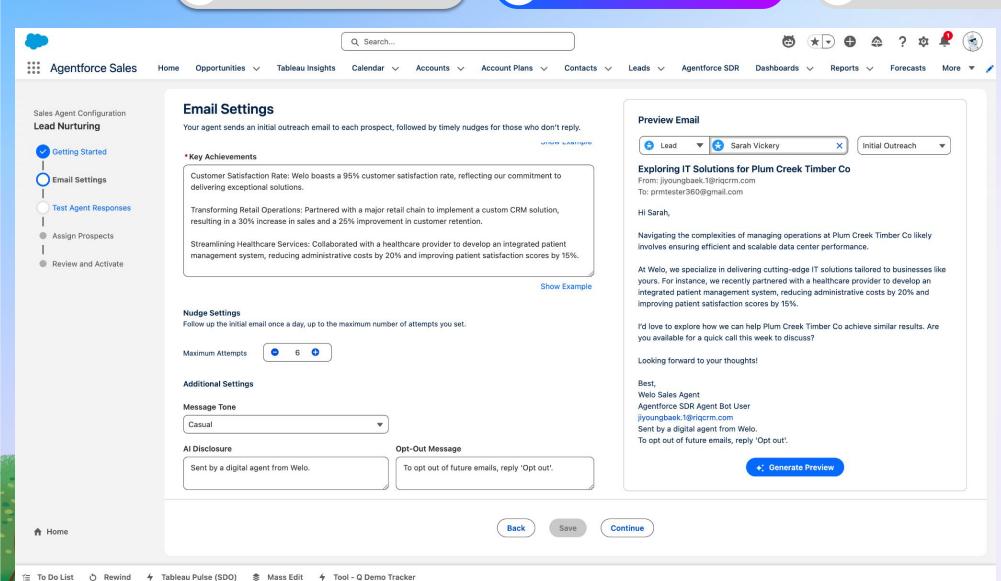


# **Email Settings**

You can also set the maximum number of nudges. This is the total number of nudge attempts the agent will send to a prospect before stopping any further engagement.

Set the tone for the agent, and adjust the signature that gets appended to the email by adjusting the AI Disclosure note and Opt-Out Message.

Signature fields are stored and translated as agent "surface instructions" which are not editable in Builder today.



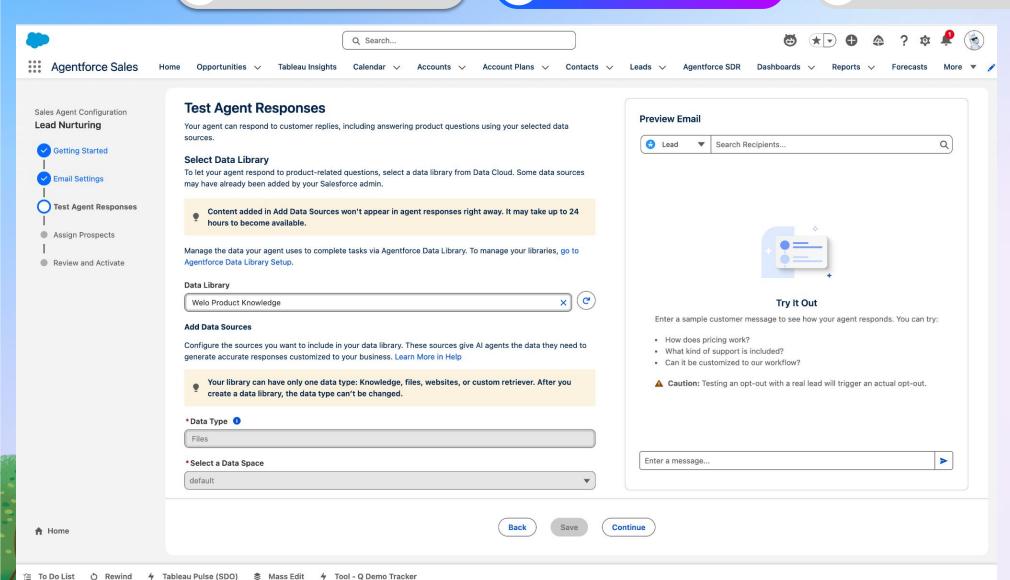


# **Email Settings**

Once you're happy with your inputs try testing your agent!
Select a lead/contact record in your CRM and select the scenario and click "Generate Preview"

This will load the preview of the email that the agent "would" send to the prospect with the provided information. Keep playing around with the inputs until you are satisfied with the output!

This will **not actually send an email** to the selected prospect record.

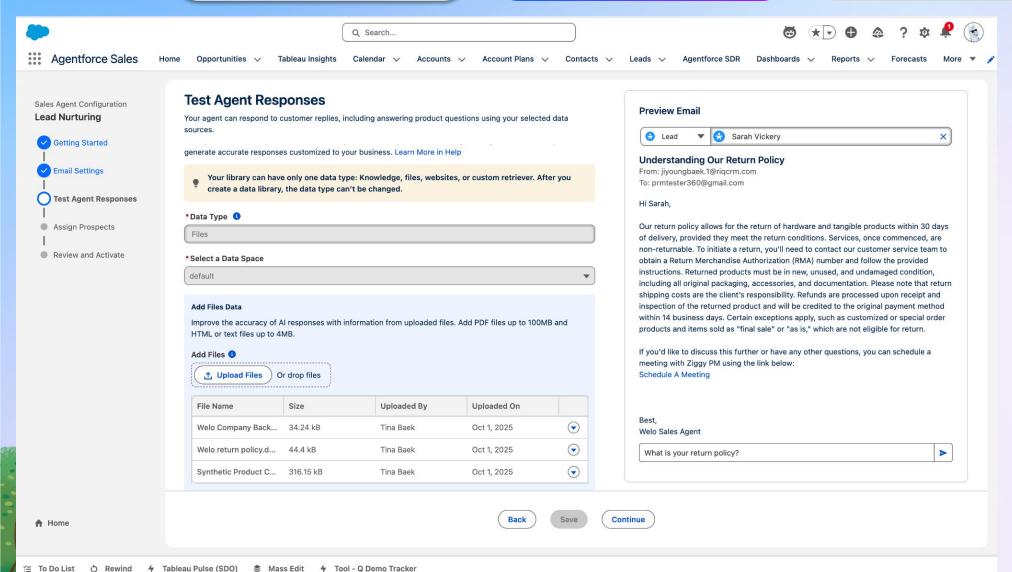




# **Reply Settings**

Associate the agent with the data library you created in Salesforce Go.

It takes a few hours for all uploaded files to be ready for agent preview. Therefore, if you have not pre-created the library and uploaded files, expect some delay in the uploaded knowledge to be available for the agent.



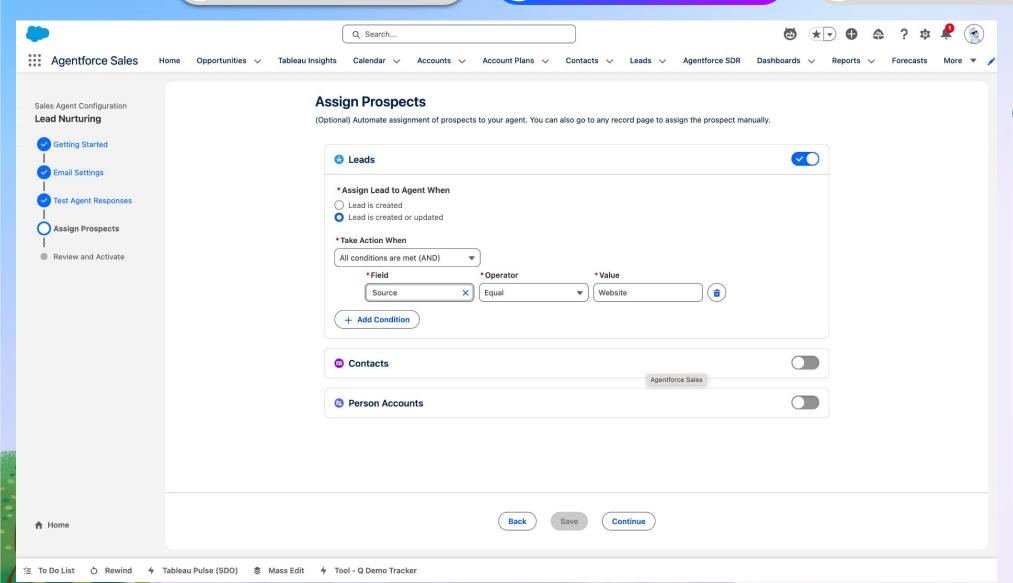


# **Reply Settings**

Test your agent responses! Select a lead/contact record and ask any question in the input field (ex. What is your return policy?)

If the agent is grounded on this knowledge and it is "ready" for usage, the agent should respond appropriately to any questions asked.

This will not actually send an email to the selected prospect record.

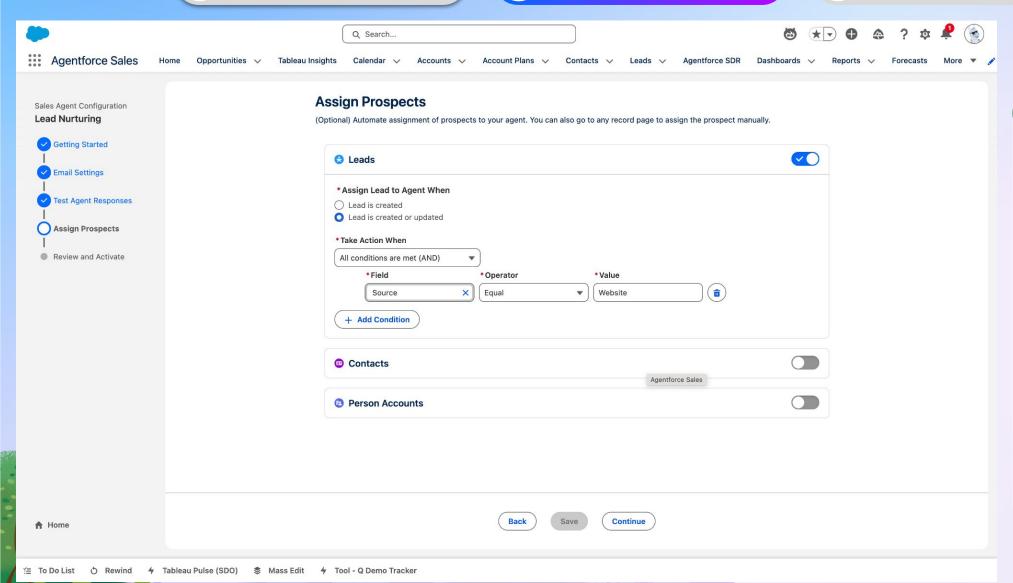




# **Assign Prospects**

Set the rules of engagement for your agent. Simply toggle leads, contacts, or person accounts depending on how you define your prospects.

Set the rule for engaging by adding conditions for each object. The agent will not get assigned to prospects until the agent is "activated"





# **Assign Prospects**

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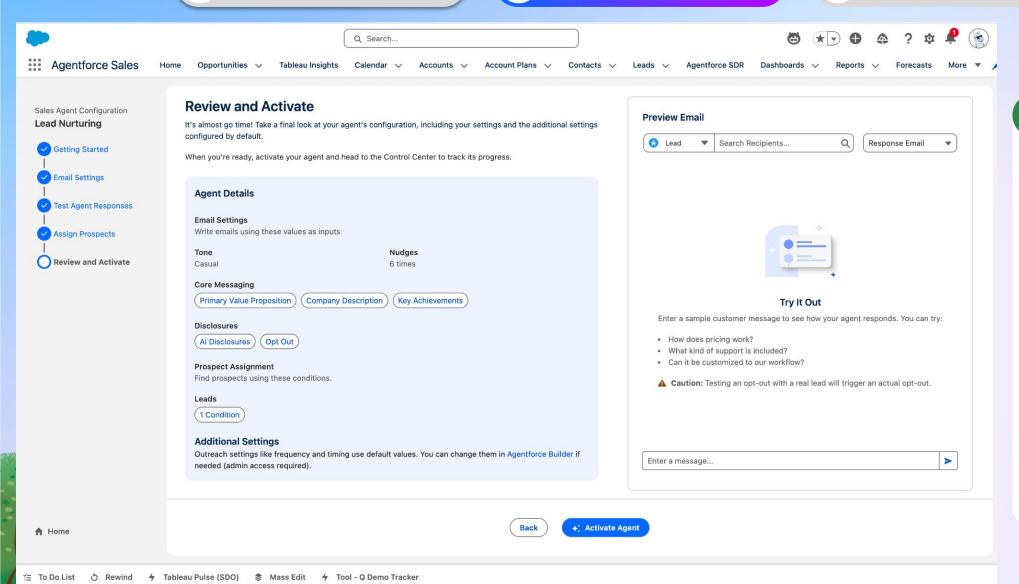
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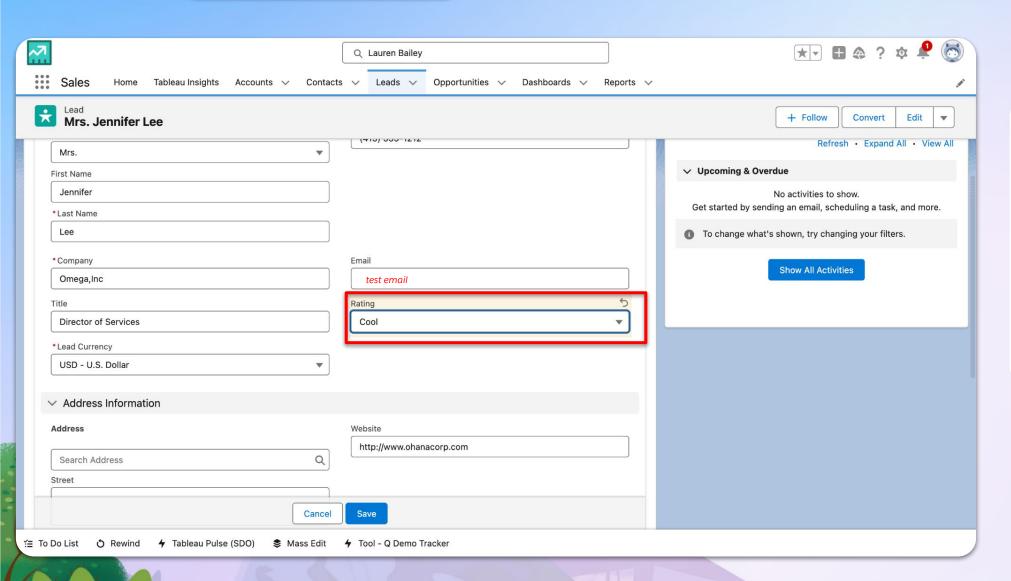






#### **Review and Activate**

You're done! If you are happy with your agent, go ahead and activate to have prospects assigned to your agent. You can also proceed without activating to continue manual testing in runtime.



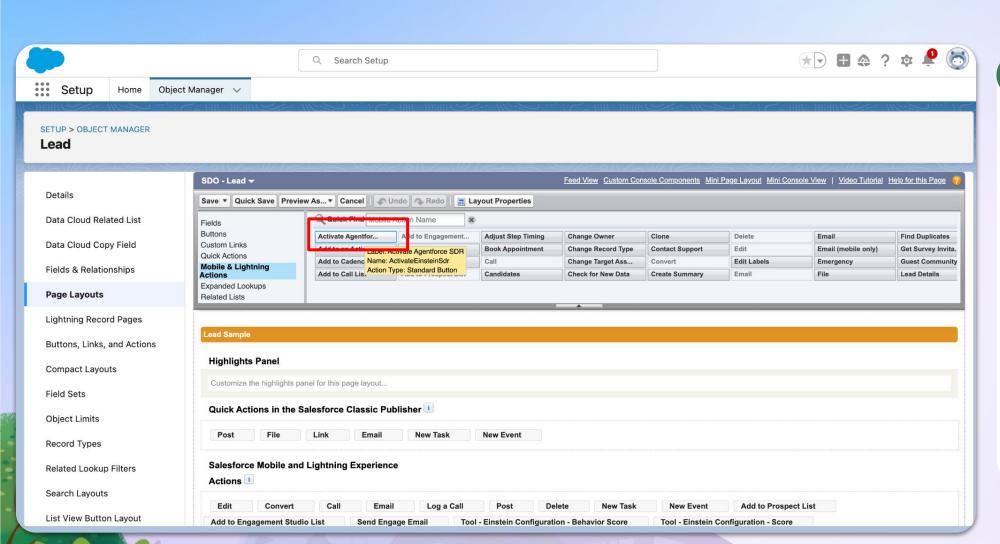


### Test Lead Auto Assignment Criteria

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

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

# **Activate Agent Manually**

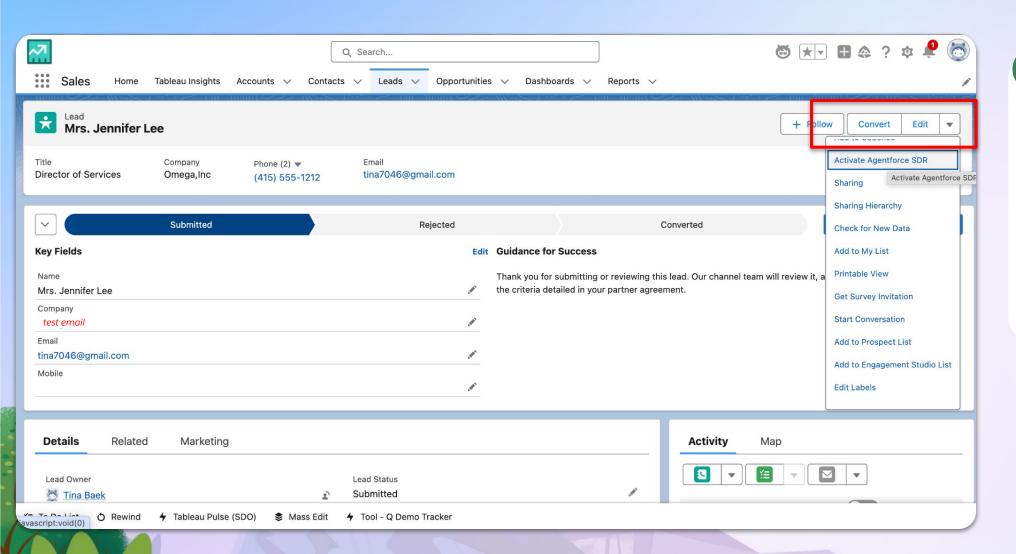




# Prepare for Testing - Add the Activate Assign to Agentforce SDR Action

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

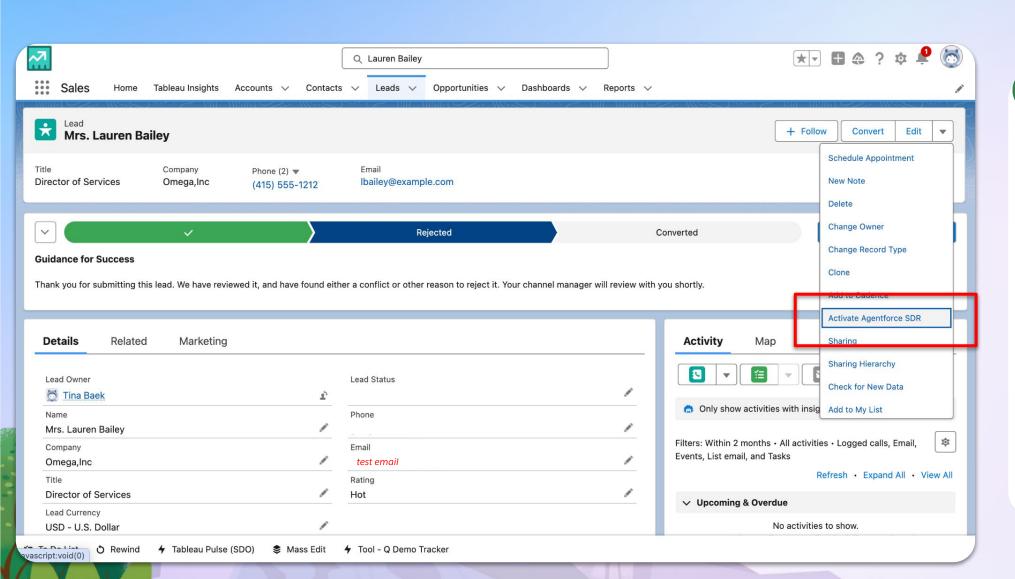
To add the action to a lead page layout, go to Object Manager > Lead > Page Layouts > SDO Lead > Mobile Lightning Actions. Then add the Activate Assign to Agentforce SDR action.





# Add Activate Assign to Agentforce SDR Button

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





# Test the Send Initial Outreach Email action

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

- To manually assign the lead to the agent, click Activate Assign to 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.

# Customization Guide

**Agentforce Sales for Lead Nurturing** 



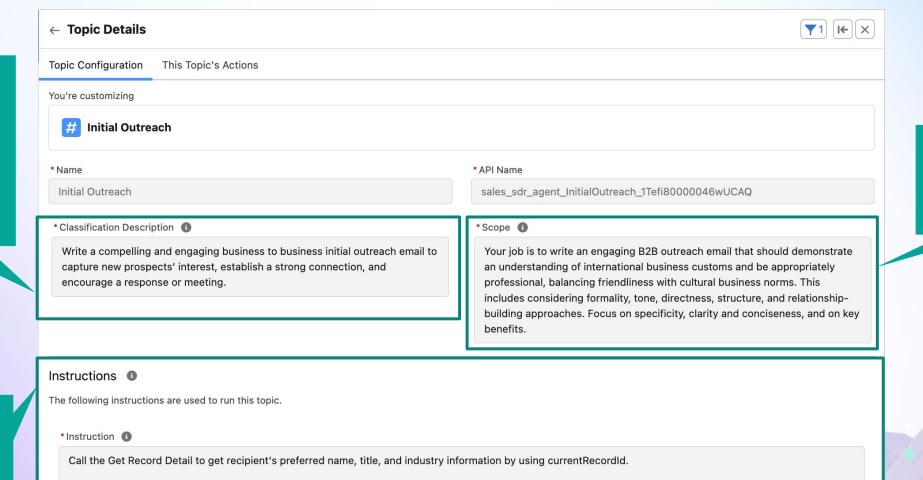


# What are Topics and Instructions?

A topic is a set of instructions (and optionally, actions) that make up the jobs an agent can do. Instructions help with the generation, formatting, and sequencing of our response and conversation.



The Classification
Description
describes the job of
the topic and what
kinds of user
messages should
trigger it.



The **Scope** sets boundaries for what the agent is capable of doing within the same topic.

Generally, focus on Instructions for changes to the content and tone of your emails.

# **Agentforce Sales for Lead Nurturing Topics**

salesforce

Six (6) out of the box topics are provided

#### **Initial Outreach**

The first, introductory email sent to the prospect.

#### Follow-Up Outreach

Nudge emails if the prospect does not engage or reply.

#### Product Q&A

Reply email answering product questions\* and handling objections. Includes meeting booking link\*\*.

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

#### **Meeting Response**

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

\*Inbox must be enabled

#### Generic Response

Reply email handing off prospect to the seller (lead owner) if the reply is "not right now" or an off-topic inquiry.

#### Manage Opt-Out

Reply email when the prospect requests to no longer receive messages and removes them from the cadence.

#### **Initial Outreach**

# **Key Areas**

#### **Email Subject Line**

Instructions to generate short and compelling subject lines

#### **Email Body**

Instructions on formatting and types of sentences to include, along with social and language conventions to follow

#### **Prospect Information**

Info gathered via actions from CRM about your prospect – may include name, title, industry, company, led source, lead country

#### **Agent Company Selling Point(s)**

Proof Points provided during Setup

#### **Agent Company Information**

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

#### **Call to Action**

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

What to Add:

#### **Industry and Title Based KPIs**

KPIs that we can highlight based on the prospect profile in the instructions

#### Section

Email Subject Line

Email Body

**Prospect Information** 

Agent Company Selling Point

Call to Action

Agent AI Disclosure

Agent Company Information

#### **Agent Output**

**Subject: Optimizing Your Data Center Operations** 

Hi Andy,

I'm reaching out from Welo, a leading provider of IT solutions and services specializing in cutting-edge hardware and comprehensive data center management. We've helped organizations like yours streamline operations and achieve measurable results, such as a 30% increase in sales for a major retail chain and a 20% reduction in administrative costs for a healthcare provider.

I'd love to explore how we can help Universal Technologies optimize your data center operations to drive efficiency and innovation. Are you available for a quick call this week to discuss further?

Looking forward to connecting!

Best regards, [Your Name]

[Your Position]

Welo

[Your Contact Information]



# Initial Outreach Topic Instructions Inventory & Suggestions

Based on OOTB Agentforce Sales for Lead Nurturing Setup

Instruction Name	OOTB Instruction	Considerations & Possible Changes	Example(s) of Changed Instruction(s)
Prospect Information	Call the Get Record Detail action to get recipient's preferred name, title, and industry information by using currentRecordId.	<ul> <li>Add additional fields from your specified object for personalization</li> </ul>	- Edit: "Call the Get Record Detail action to get recipient's preferred name, title, industry information, and lead source by using currentRecordId and personalize the email based on the information found."
Opening & CTA Content	The opening line of the email body must be simple, clear, and direct, strictly avoiding any well-wishes or pleasantries. End the email with a light, urgent, yet low-friction call to action.	<ul> <li>Provide more information on how you want you CTAs to be, perhaps removing the "Looking forward to meeting you." type closing.</li> <li>You could also add instructions to modify your seller signoff here, reducing the amount of information or adding an AI disclosure additionally within the email body.</li> </ul>	<ul> <li>Edit: "End the email with a clear, one sentence call to action in second person directly to the recipient. Do not include closing pleasantries such as "Looking forward to connecting."</li> <li>In the closing, only include your name and title."</li> </ul>



# Initial Outreach Topic Instructions Inventory & Suggestions

Based on OOTB Agentforce Sales for Lead Nurturing Setup

Instruction Name	OOTB Instruction	Considerations & Possible Changes	Example(s) of Changed Instruction(s)
Seller Company Information	Leverage proven cold email strategies and use the Company Description, Primary Value Proposition, and Proof Points to write the email.  # Company Description [INSERT COMPANY DESCRIPTION HERE]  # Primary Value Proposition [INSERT PRIMARY VALUE PROPOSITION HERE]  # Proof Points [INSERT PROOF POINTS HERE]	<ul> <li>Consider editing this to be more specific to the types of roles, titles, or industries you may reach out to.</li> <li>You might also edit this to adjust the tone to be more neutral for the agent to change or to fit whichever tone you want the agent to follow.</li> </ul>	<ul> <li>Include links for proof points to product pages or demos you may want the Agent to send in the email</li> <li>Add: "Only include proof points and value props that are relevant to someone in the job of recipient's industry and title."</li> </ul>
Personalization Parameters & Language	Indirectly use the recipient's industry and title to write a cold outreach email. You must not mention their role or industry directly, instead mention specific factual challenges or relevant responsibilities tied to their industry and title. Avoid generic language and buzzwords or phrases.	- Add additional methods for personalization here or create a new instruction. Specify how to personalize based on different details.	<ul> <li>Add: "The language, tone and verbiage for this email must be tailored for communication to a current/existing Welo customer who already owns Welo products and/or services and is not a net new prospect."</li> </ul>



# **Agent Behavior Design Best Practices**

When customizing instructions, 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

Be specific about language or sentences you want or don't want (e.g. "Never ask rhetorical questions.")

Encourage LLM to have variety with the descriptor "creative"

#### Things to Avoid

Overediting the Classification
Description or Scope, as it may cause
the incorrect email to be sent

Including too many few-shot examples, which may constrain the model's ability to generate unique and personalized messaging

# **Advanced Customization Library**

#### **Recommended Customizations Checklist**



Customization	Description	Guidance
Update fields on CRM records based on agent engagement with a lead	Allows your team and Agentforce to have more context on your recent interactions with leads	Create a custom Flow action to execute the specified action and modify the Topic instructions to prioritize that action
Create a task for a seller to take action, based on Lead Nurturing engagement	Improves the handoff process between Agentforce and your team	Create an action that creates tasks for Sellers and add an instruction to call the action when needed
Change Default AI Disclosure	Makes sure your AI Disclosures are compliant and flow well with the rest of the content of your email	Modify this during Set Up and include legal and marketing early on to provide specific language
		<ul> <li>Option 1: Build multiple agents and set different languages during set up, assigning leads to different agents depending on language.</li> </ul>
Engage Leads in Multiple Languages	Reach a broader, global audience	<ul> <li>Option 2: The agent generally responds to different languages in that same language, so simply adjust instructions as needed and make sure to account for cultural differences with respect to tone, diction, formality, and more. However, your Initial Outreach email will remain in the set language.</li> </ul>

# **Advanced Customization Library (Cont.)**

#### **Recommended Customizations Checklist**

Cloud to personalize the email

Customization	Description	Guidance
Change email formatting to include bolding/italics/images	Makes emails easier to parse and read for recipients, along with highlighting the most important information	Edit instructions to include general formatting or specific HTML tag instructions, such as:  - ***Your output must:  - Use HTML to highlight key phrases and numbers in bold  - Not include CSS attributes, explanations, notes, or the <html> tag</html>
Include a generic meeting link instead of a Lead Owner's link	Allows leads to see more availability and your team to take meetings at their convenience	Embed the link into the meeting response topic and change Instructions to always set "Lead Owner has Inbox Disabled"
Ask qualification questions when customers request a meeting	Improves the handoff process and provides Agentforce more frameworks for understanding and communicating with the lead	Create custom flow actions for tasks and field updates, update Respond to Prospect Topic instructions, customize Topics to incorporate qualification questions
Leverage specific data stored in Data	Give Agentforce more flexibility in providing information	Add Data Libraries to your Agent

on a wide variety of topics about your company

Add Data Libraries to your Agent

# **Advanced Customization Library (Cont.)**

#### **Recommended Customizations Checklist**

•	
+	

Customization	Description	Guidance
Disengage Lead Nurturing Agent for any reason and skip sending an email	Gives you more flexibility on when you want a human to take over for Agentforce or remove leads from the cadence	Create a custom Flow action to remove the agent from the cadence. Use the Salesforce OOTB Opt Out Lead Action as a starting point.
Configure Lead Nurturing Agent to determine a new lead owner & hand off to that person	Hand off leads depending on the actual contents of their conversation to assign leads based on their individual skillsets	Create a custom action that determines the new lead owner. Call that action prior to drafting & scheduling the email by editing Topic Instructions.

# Important Considerations

**Agentforce Sales for Lead Nurturing** 





#### **Important Considerations**

- Only Admins with Configure Agentforce SDR Agent can create the agent.
- Standard users must have **Use Agentforce SDR perm** to engage with the agent directly (activate/cancel outreach, edit/reschedule outreach).
  - Users do NOT need special perms to be cc'd on an email as part of agent handoff.
- The agent works on the Lead object, Contact object, and Person Account object.
- When testing in runtime, 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: <u>Considerations for Excluding Data from Einstein Activity Capture</u>)
- It is part of our Acceptable Use Policy and part of the California Bots Law that an AI Agent must disclose itself as such. To honor this, Agentforce Lead Nurturing employs sign-off disclosure at the end of every email. This is now customizable via our simplified configuration experience.

#### **Limitations - Email Sending & Working Leads**

- Each agent email 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 assigning records to the Lead Nurturing agent, 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.
- A meeting booking link is present in all replies if Salesforce Inbox is enabled.
  - See <u>slides</u> 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.

#### **Common Errors & Troubleshooting**

- See <u>Troubleshoot Lead Nurturing Email</u> in Salesforce Help for an explanation of Lead Nurturing 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
- 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"  $\rightarrow$  Please add email quick action on the record page layout.



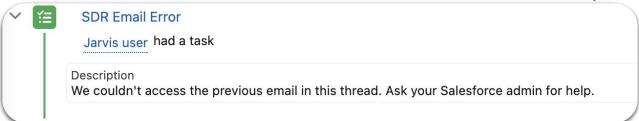
#### **Email Errors - Common Reasons**

#### **Delays**

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

#### **Failure to Send Email**

- 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 the agent and another EAC User → impacts Replies (see image)
- Reusing email address across multiple leads assigned to the agent → occasional issues with Replies
- Sender & recipient have same email domain (classifies as internal email) → impacts all messages

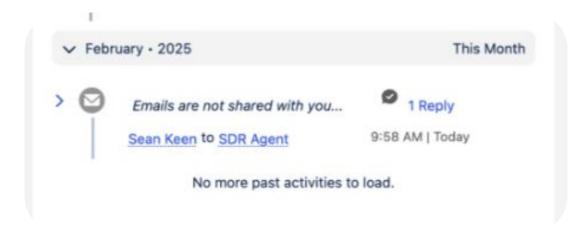




#### **Email Errors - Common Reasons**

#### 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.





#### **Important Considerations**

## Adding Trusted URLs to Your Agentic Outreach:

Salesforce has begun enforcement of Trusted URL allowlists for Agentforce and Einstein Generative AI agents. This update is part of our ongoing efforts to strengthen customer environments. An admin-controlled allowlist will prevent agents from generating unapproved URLs affecting images or content from external domains or links to external documentation or third-party systems. If a domain is not on your Trusted URL list, the link will be blocked.

#### What Action Do I Need to Take?

- Immediately add any external URLs your agents rely on to your Salesforce Trusted URLs list or to the agent's instructions.
- This includes links to things like external feedback forms, knowledge bases, or any third-party websites.

#### **How to Add Trusted URLs:**

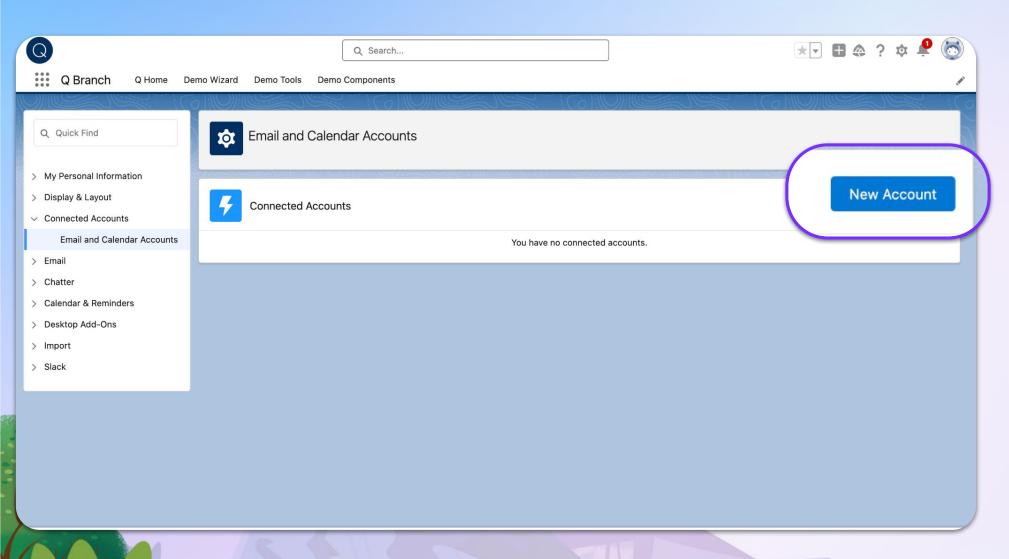
- 1. Navigate to Setup.
- 2. In the Quick Find box, search for and select Trusted URLs.
- 3. Click New Trusted URL.
- 4. Enter the URL (e.g., https://forms.google.com). You can use a wildcard (\*) like \*.example.com.
- 5. Select the appropriate CSP directives (e.g., img-src for images).
- 6. Ensure you have "Customize Application" and "Modify All Data" permissions.

#### How to Use Agent Instructions:

- 1. Open the agent in Agent Builder.
- 2. In the agent instructions, add the URLs you want to allow. Note that these must be exact URLs and cannot contain wildcards.



# How to Enable Salesforce Inbox

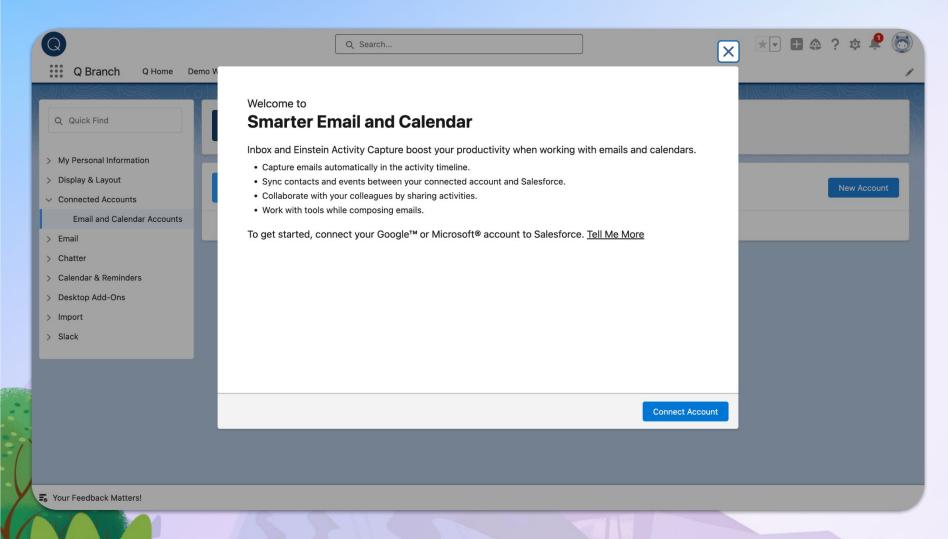




#### Connect Sales User Email Accounts to Salesforce Inbox

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

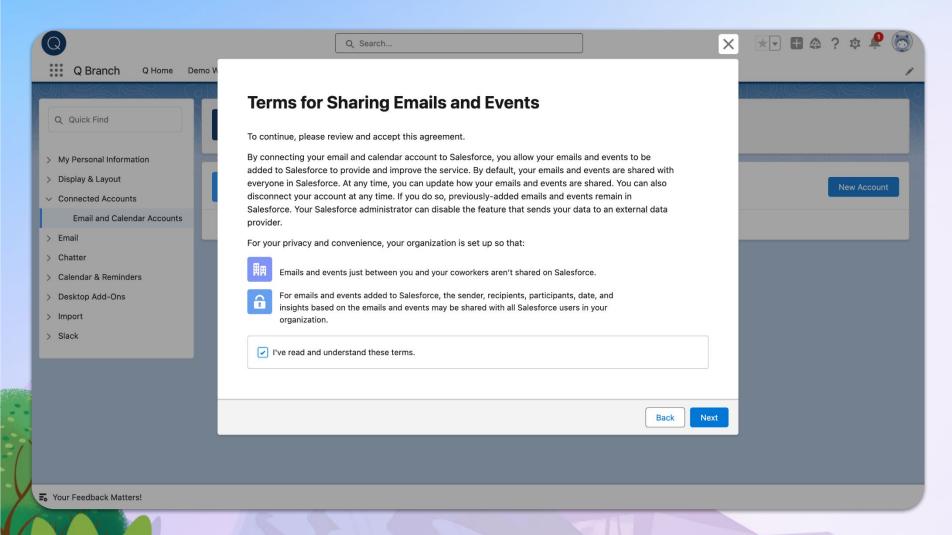
From the user's Personal Settings, they can click **Email** and Calendar Accounts.





#### Connect User Email Accounts to Salesforce Inbox

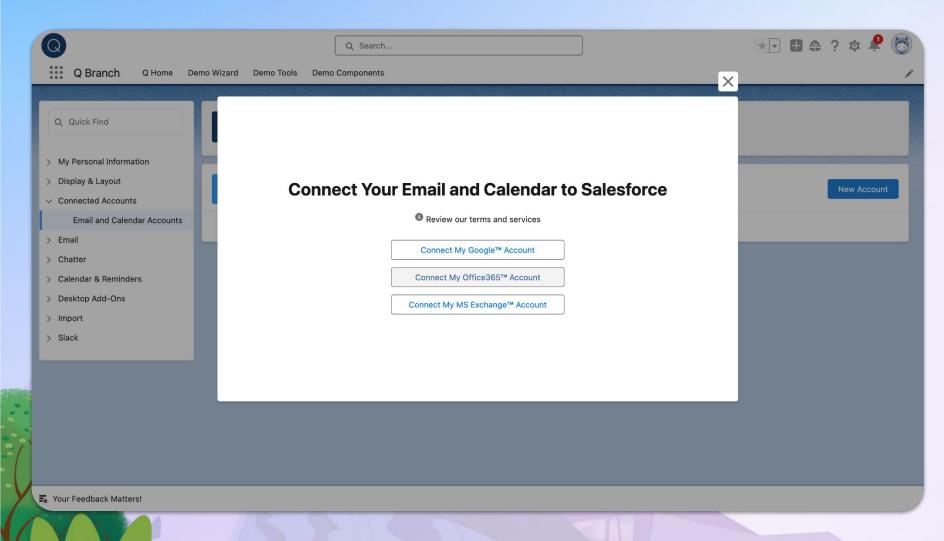
To get started, users click **New Account** and then **Connect Account**.





# Connect User Email Accounts to Salesforce Inbox

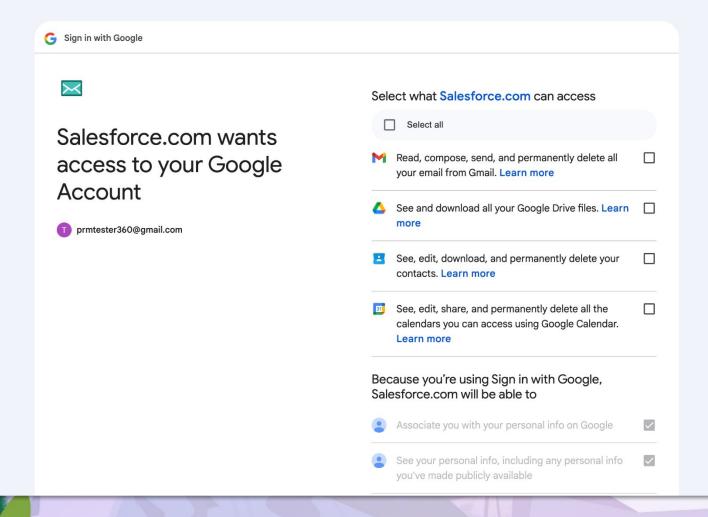
Read the terms and then click **Next**.





#### Connect User Email Accounts to Salesforce Inbox

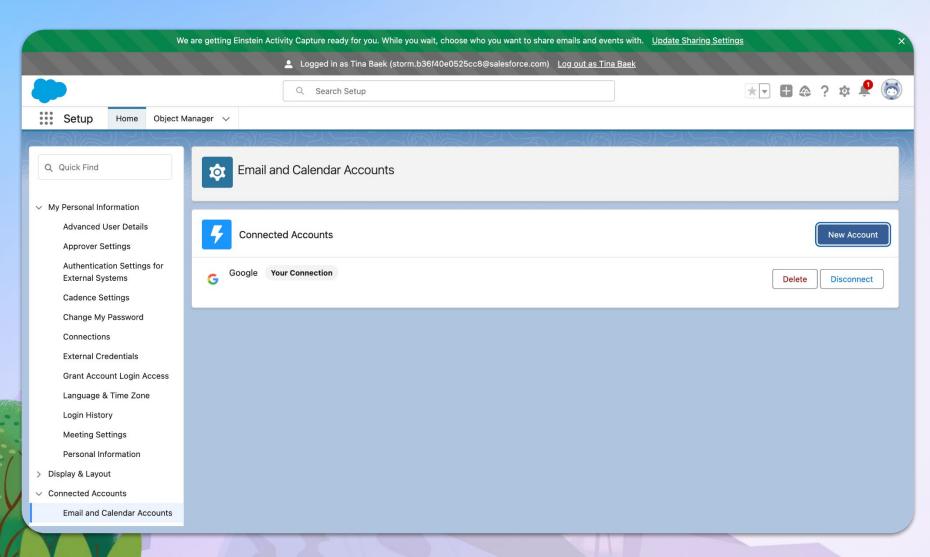
Click the email and calendar service used by your company.





# Connect User Email Accounts to Salesforce Inbox

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

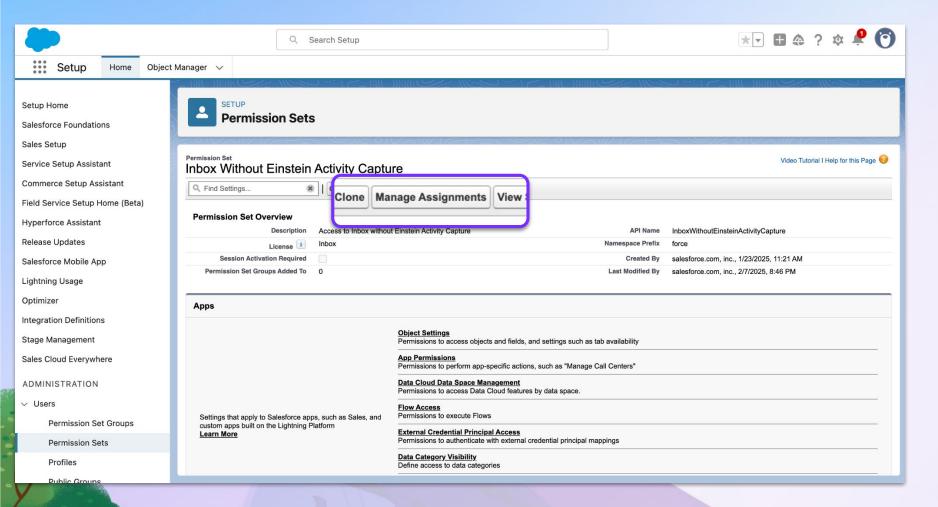




# Connect User Email Accounts to Salesforce Inbox

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

# Grant Sales Users Access to Inbox



Salesforce Help: Assign Agentforce User Permissions for Lead Nurturing
Salesforce Help: Lead Nurturing Agent Permission Sets
Connect Your Email and Calendar to Salesforce with Einstein Activity Capture or 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 Lead Nurturing 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.