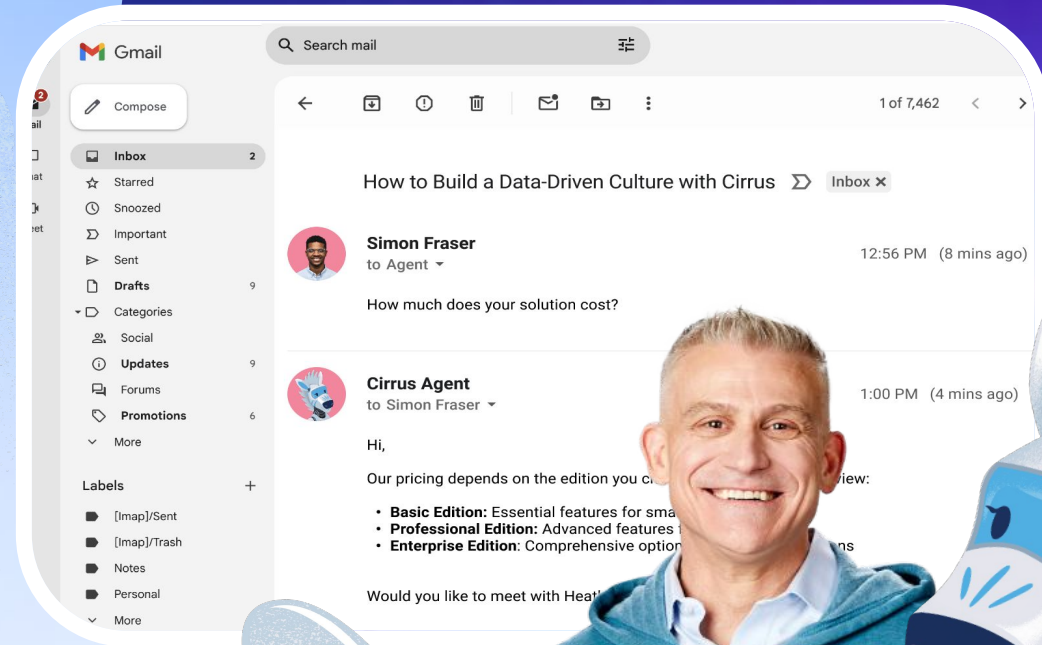


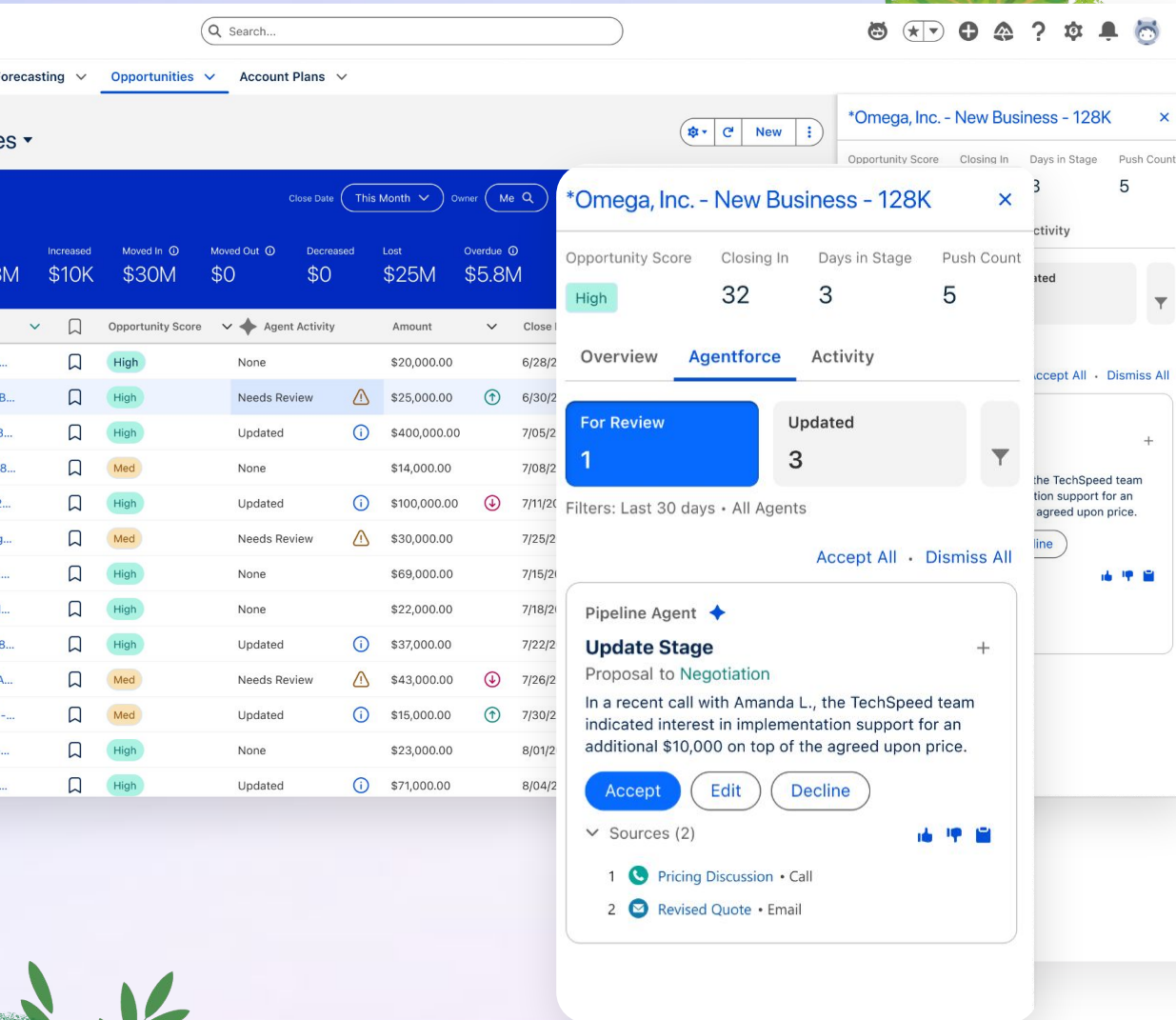


Introducing Agentforce for Sales

Autonomous agents to scale
your sales team

June 2025





The screenshot displays the Agentforce for Sales Pipeline Management interface. The top navigation bar includes a search bar and tabs for Forecasting, Opportunities, and Account Plans. The main view shows a list of opportunities with columns for Opportunity Score, Agent Activity, Amount, and Close Date. A detailed view of a specific opportunity, '*Omega, Inc. - New Business - 128K', is shown on the right. This view includes a summary of the opportunity score, closing in, days in stage, and push count, as well as a list of sources for the update.

Opportunity Score	Closing In	Days in Stage	Push Count
High	32	3	5

Opportunity Score	Agent Activity	Amount	Close Date
High	None	\$20,000.00	6/28/2
High	Needs Review	\$25,000.00	6/30/2
High	Updated	\$400,000.00	7/05/2
Med	None	\$14,000.00	7/08/2
High	Updated	\$100,000.00	7/11/2
Med	Needs Review	\$30,000.00	7/25/2
High	None	\$69,000.00	7/15/2
High	None	\$22,000.00	7/18/2
High	Updated	\$37,000.00	7/22/2
Med	Needs Review	\$43,000.00	7/26/2
Med	Updated	\$15,000.00	7/30/2
High	None	\$23,000.00	8/01/2
High	Updated	\$71,000.00	8/04/2

***Omega, Inc. - New Business - 128K**

Opportunity Score: High, Closing In: 32, Days in Stage: 3, Push Count: 5

Overview **Agentforce** Activity

For Review 1 **Updated** 3

Filters: Last 30 days • All Agents

Pipeline Agent ♦

Update Stage Proposal to Negotiation

In a recent call with Amanda L., the TechSpeed team indicated interest in implementation support for an additional \$10,000 on top of the agreed upon price.

Accept **Edit** **Decline**

Sources (2)

- 1 Pricing Discussion • Call
- 2 Revised Quote • Email

Autonomously Manage Deals for Pipeline & Forecast Accuracy

Conversation-driven pipeline updates

Automatically synthesize unstructured data from calls, emails, and notes into field updates and next steps

Get consistent, objective deal updates

Reference source context for every field update to ensure opportunity records are accurate

Flexible control and customization

Configure which fields are updated and when, so automation aligns to your sales process and methodology

How Agentforce Manages Pipeline

salesforce

Starts with...

Synthesizes Data

Identifies Updates

Outcome

Seller Works Deal while Agent Tracks Deal Changes

Seller and deal activity captured

Seller Notes

Customer Meetings

Emails

Calls

Agent Synthesizes Conversation Data & Notes

The screenshot displays the Agentforce interface during a 'Discovery Call with Omega'. It features a 'Meeting Playback' section with a video feed of a woman. Below the video is a 'Transcript' section showing a conversation between Ron Reid and Sydney Halden. A 'Notes' section titled 'My Notes' is also visible, listing recent notes and customer impressions.

Agent Identifies Next Best Action to Progress Deal

Select appropriate next steps based on deal stage.

Update Opportunity Stage

Next Steps

Custom Fields

Agentforce Executes the Updates on the Seller's Behalf

Agentforce 05/12/2025

☒ Stage was updated

☒ Accepted by Sydney Halden

Qualification to Discovery

Rationale: The customer expressed interest in the Advanced Subscription and requested a detailed walkthrough, indicating a need for further exploration of their requirements. This aligns with the Discovery stage definition.

> Sources (3)

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

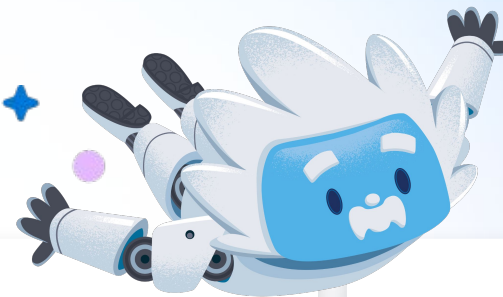
What shouldn't
they do



Channel

Where do
they work

Trust & Security



The 5 attributes of pipeline management



Role

boost seller
efficiency



Data

Conversation
Data, Seller
Notes



Actions

Field updates



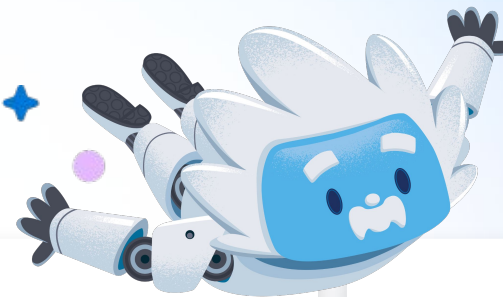
Guardrails

Autonomous vs
assistive
updates



Channel

Pipeline
Inspection,
Employee
Agent



Trust & Security



Demo

Pipeline Management





Pipeline Management

Out of the Box Topics & Actions

Topic	Description	Actions
Field Update Suggestions	Engages and interacts with the user about suggestions to update a field.	<ul style="list-style-type: none">• Suggest Next Step for Opportunity• Suggest Stage for Opportunity
Record Management	Assists users with identifying records to update and performing create/update operations.	<ul style="list-style-type: none">• Query Record• Update Record Fields



Pipeline Management

Out of the Box Flows

Flow	Description	Customization
Process Field Update Suggestions	Adds the agent autonomous user as an opportunity team member to eligible opportunities and generates field update suggestions for the relevant fields on the opportunity record. Suggestions are generated based on the data sources enabled by the user, such as conversation transcripts, emails, or content notes.	Customize to define which opportunities the agent should work on, how frequently, and which fields are updated
Get Opportunity Grounding Data	Gets data from voice calls, video calls, content notes, and emails that are associated with an opportunity, and sends those details to the associated prompt template as prompt instructions.	Customize to include additional data sources



Before You Get Started

Pipeline Management



Identifying Use Case Fit

Pipeline Management is a great fit if you...

- ✓ Record sales calls and meetings, correspond with prospects via email, and have seller notes on deals
- ✓ Need sellers to regularly update opportunity records for pipeline visibility and forecast accuracy
- ✓ You use the Salesforce opportunity object and the Pipeline Inspection view

Technology and Data Considerations



		Required	Highly Suggested
Objects	Do you currently use or plan to use the Opportunity object ?	✓	
Data Sources	Do you record and store sales calls and meetings digitally, correspond with prospects via email, and capture seller notes?	✓	
	For out of the box use - do you currently use or do you plan to use Einstein Activity Capture ?		✓
	For out of the box use - do you currently use or do you plan to use Einstein Conversation Insights ?		✓
	To leverage out of the box functionality - do you currently use or are you willing to use Salesforce Notes ?		✓
Product Supporting Features	Do you currently use Pipeline inspection?	✓	

Pipeline Management Required & Suggested Features

Feature	Required	SKU Name	How Pipeline Management uses the feature
Einstein Generative AI	✓	Salesforce Foundations	Unlocks generative AI and the Agentforce platform
Agentforce Employee Agent (Sales Management Template)	✓	Agentforce for Sales or Agentforce 1 Sales Edition	Allows users to request and approve field updates conversationally. Create an agent using the Sales Management template and assign access to the agent using a permission set.
Pipeline Inspection	✓	Sales Cloud EE and above	Surfaces suggested actions to users while they are reviewing their opportunity list views
✓ Required - At least one of the data sources below, or BYO data			
Salesforce Notes	Recommended	All Editions	Allows sellers to manually capture notes on opportunity records to provide more context for the agent
Einstein Conversation Insights (ECI)	Recommended	Sales Cloud EE includes 10 Licenses UE and above included	Captures call transcripts from video/voice meeting vendors
Einstein Activity Capture (EAC)	Recommended	Sales Cloud EE and above	Ensures sales emails are automatically captured in Salesforce and associated with the correct CRM records

Agentforce for Sales Pipeline Management Permissions

	Permission Set(s)	Description
REQUIRED PERMISSION SET FOR ALL USERS	<ul style="list-style-type: none">UnmeteredUserBasedAI	Assign this permission to the SalesManagementAgent User and all human users who will interact with agents to avoid triggering usage-based billing. Without it, their AI activity will incur charges.
Pipeline Management Human Users	<ul style="list-style-type: none">UseAgentforcePipelineManagement	Allows sales rep to edit and accept suggestions made by the Pipeline Management Agent.
Agent User	<ul style="list-style-type: none">PipelineManagementAgentAutonomousUserSalesManagementAgentAutonomousUserViewAllCalls	Assign these permission sets to the SalesManagementAgent User to allow the agent to access opportunities and make suggestions based on grounding data sources.
Salesforce Admin	<ul style="list-style-type: none">Agentforce Default AdminPrompt Template ManagerManage Flows	Allows the admin to manage and configure the Pipeline Management Agent.

Gathering Requirements



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

Plan for Success

- ☐ Define fields you want Pipeline Management to work on.
- ☐ Define the data sources you need to accurate and complete field updates and if they are in Salesforce or are external.
- ☐ Determine what cadence the field updates should be made and if suggestive or autonomous mode is the best for your business.
- ☐ Determine if there are related objects that could be created off the opportunity by Pipeline Management to accelerate deal management.



Create Your Agent

Pipeline Management



Pipeline Management Set Up Overview

1 Enable Agentforce for Sales

Enable required features and complete prerequisite setup steps

2 Create and Configure

Configure Agentforce for Sales Pipeline Management

3 Test and Preview

Test and preview field updates in Agent Builder before activation

4 Runtime and Monitoring

Monitor field updates live in production



1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

Salesforce Go > Einstein Generative AI

Einstein Generative AI

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

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

Turn On Einstein Generative AI

On

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

Set Up the Basics

☐ **Manage Configuration** Optional[Go to Setup](#)

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

Add Quantity

Contact us to get this feature

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

Get to Know Einstein Generative AI

[See How It Works](#)

Feature Sets

[Forecast with Confidence](#)[Keep Deals on Track](#)[Boost Seller Productivity with AI](#)[Nurture Sales Leads](#)[Connect with Sales Prospects and Customers](#)[Automate & Guide Selling](#)

Learn on Trailhead

[Generative AI Basics](#)[AI Strategy](#)[AI + Data: Project Planning](#)

Turn on Einstein Generative AI

In Setup, search for
Salesforce Go

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

1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, Custom Permissions, and Enablement Sites (myTrailhead). The main content area is titled 'Permission Sets' and shows the 'Use Agentforce Pipeline Management' permission set. The overview table lists the API Name as 'UseAgentforcePipelineManagement', Namespace Prefix as 'force', and Created/Modified by 'salesforce.com, inc.'. Below the overview, the 'Apps' section lists various permissions: Object Settings, App Permissions, Data Cloud Data Space Management, Flow Access, External Credential Principal Access, Data Category Visibility, Custom Metadata Types, and Custom Setting Definitions. The 'System' section lists System Permissions.

Setup Home Object Manager

Search Setup

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Enablement Sites (myTrailhead)

Content Permissions Assistant

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

SETUP

Permission Sets

Permission Set

Use Agentforce Pipeline Management

Find Settings... Clone Manage Assignments View Summary

Video Tutorial | Help for this Page

Permission Set Overview

Description	Give access to the Sales Management User.	API Name	UseAgentforcePipelineManagement
License	Sales Management User	Namespace Prefix	force
Session Activation Required	<input type="checkbox"/>	Created By	salesforce.com, inc., 7/15/2025, 3:24 PM
Permission Set Groups Added To	0	Last Modified By	salesforce.com, inc., 7/15/2025, 3:24 PM

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Data Cloud Data Space Management
Permissions to access Data Cloud features by data space.

Flow Access
Permissions to execute Flows

External Credential Principal Access
Permissions to authenticate with external credential principal mappings

Data Category Visibility
Define access to data categories

Custom Metadata Types
Permissions to access custom metadata types

Custom Setting Definitions
Permissions to access custom settings

System

Settings that apply across all apps, such as record and user management
[Learn More](#)

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



Assign Admin Permission

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

1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar with 'Search Setup' and a status bar with 'EPT: 0.62 s' and '7039.55 KB'. The left sidebar has a search bar with 'pipe' and a list of navigation items: Feature Settings, Sales, Opportunities, Pipeline Inspection Setup, and Agentforce for Sales. The 'Agentforce for Sales' item is expanded, showing 'Agentforce Pipeline Management' as the selected option. The main content area is titled 'Agentforce Pipeline Management Setup' with a sub-header 'When you turn on Agentforce Pipeline Management, control the behavior of your agent by completing these configuration steps.' Below this, there's a section 'Step 1: Enable Agentforce Pipeline Management' with a toggle switch labeled 'Inactive'. To the right of the toggle is an 'Enable All' button. Below the toggle, there are two columns of features to be enabled: Prompt Builder, Flows, Agentforce Builder, Opportunity Teams, Pipeline Inspection, and Content Notes. At the bottom of this section is a 'Check Data Sources' button. Below Step 1 is 'Step 2: Set Agent Activity'. At the bottom of the page is a section 'Build Your Agent' with instructions to go to Agentforce Builder to finish setting up Agentforce Pipeline Management.

Setup [Home](#) Object Manager [▼](#)

Search Setup

EPT: 0.62 s 7039.55 KB

Search Setup

Agentforce Pipeline Management Setup

When you turn on Agentforce Pipeline Management, control the behavior of your agent by completing these configuration steps.

Step 1: Enable Agentforce Pipeline Management Inactive

To enable Agentforce Pipeline Management, turn on several supporting features.

Enable All

✓ Prompt Builder [1](#) ✓ Flows [1](#) ✓ Agentforce Builder [1](#)
✓ Opportunity Teams [1](#) ✓ Pipeline Inspection [1](#) ✓ Content Notes [1](#)

To get the most out of Agentforce Pipeline Management, configure more data sources.

Check Data Sources

✓ Einstein Conversation Insights [1](#) ✓ Salesforce Email [1](#)

> Step 2: Set Agent Activity

Build Your Agent

Go to Agentforce Builder to finish setting up Agentforce Pipeline Management. Create an agent from the Sales Management template and add the required topics and actions. Then, test, preview, and edit your agent configuration.



Turn on Pipeline Management

In Setup, search for Agentforce Pipeline Management

Enable the feature

1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

Setup | Home | Object Manager

Search Setup

EPT: 0.62 s 7039.55 KB

pipe

Feature Settings

Sales

Opportunities

Pipeline Inspection Setup

Agentforce for Sales

Agentforce Pipeline Management

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

Agentforce Pipeline Management Setup

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To enable Agentforce Pipeline Management, turn on several supporting features.

Enable All

✓ Prompt Builder ⓘ

✓ Flows ⓘ

✓ Agentforce Builder ⓘ

✓ Opportunity Teams ⓘ

✓ Pipeline Inspection ⓘ

✓ Content Notes ⓘ

To get the most out of Agentforce Pipeline Management, configure more data sources.

Check Data Sources

✓ Einstein Conversation Insights ⓘ

✓ Salesforce Email ⓘ

Step 2: Set Agent Activity

Build Your Agent

Go to Agentforce Builder to finish setting up Agentforce Pipeline Management. Create an agent from the Sales Management template and add the required topics and actions. Then, test, preview, and edit your agent configuration.



Turn on Recommended Features

Optionally, enable Einstein Conversation Insights or Einstein Activity Capture for richer data

1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

Search Setup

Search Setup

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Setup

Home

Object Manager

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Feature Settings

Sales

Opportunities

Pipeline Inspection Setup

Agentforce for Sales

Agentforce Pipeline Management

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

> Step 1: Enable Agentforce Pipeline Management

Active

Step 2: Set Agent Activity

Grant Agent Access to Video and Voice Calls

Determine the level of access to voice and video calls that the agent can have. Voice and video calls are used to inform Agentforce suggestions. If you don't grant the agent permission to access calls, it can't use call data when giving suggested actions to take on opportunities unless the calls are manually shared with the agent.

Give Agent Access to View All Calls ¹

Give Agent Access to Calls Based on User Role ¹

On

Assign Role

Save and Activate Flow to Get Field Update Suggestions

Save the Process Field Update Suggestions flow as a new flow, then activate it. The schedule-triggered flow defines the cadence and criteria for evaluating opportunities to include in the agent's work. When the flow runs, the agent user is added as an opportunity team member to eligible opportunities and generates field update suggestions for the relevant opportunity fields. [Learn more](#)

Set Agent Behavior

Agentforce can either provide suggested actions to users or update opportunities autonomously. If you set it to provide suggested actions, users can accept or decline them in Pipeline Inspection.

☒ Suggest actions

☐ Make updates autonomously

To optimize agent performance, confirm that your opportunity stages align with your team's sales processes and definitions, and that each stage includes a detailed description.

Define Opportunity Stages

Define stages to help the agent accurately identify the correct stage for the opportunities it monitors.

Go to Flow Builder

Manage Stage Descriptions



Grant Agent Access to Calls

If using Einstein Conversation Insights, choose how you want to grant the agent access to video and voice calls

1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

Search Setup

Search Setup

EPT: 0.73 s 7322.63 KB

Star icon

Plus icon

Shield icon

Help icon

Settings icon

Notifications icon (1)

Profile icon

Setup

Home

Object Manager

Search Setup

Feature Settings

Sales

Opportunities

Pipeline Inspection Setup

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Manage Stage Descriptions



Activate the Flow

Open the Flow template in Flow Builder, Save As, and activate the new Flow

1

Enable Agentforce for Sales

2

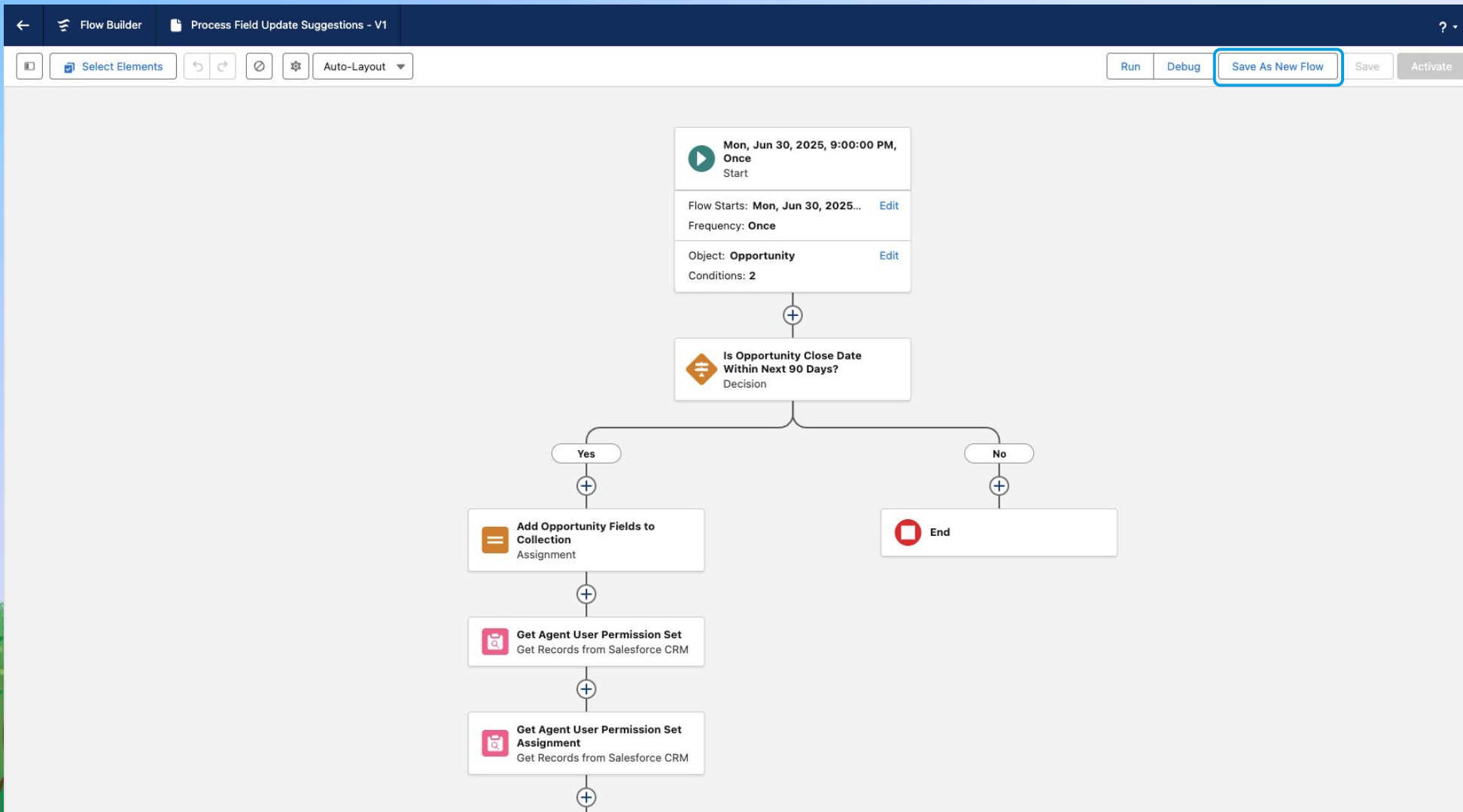
Create and Configure

3

Test and Preview

4

Runtime & Monitoring



Activate the Flow

Open the Flow template in Flow Builder, Save As New Flow, and the activate the Flow.

You can modify the start date and time, and choose whether to run Once, Daily, or Weekly.

You can also modify the criteria for what opportunities the agent will monitor.

1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

Search Setup

Search Setup

EPT: 0.73 s 7322.63 KB

Star icon

Plus icon

Shield icon

Help icon

Settings icon

Notifications icon (1)

Profile icon

Setup

Home

Object Manager

pipe

Feature Settings

Sales

Opportunities

Pipeline Inspection Setup

Agentforce for Sales

Agentforce Pipeline Management

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Give Agent Access to Calls Based on User Role

Assign Role

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Define Opportunity Stages

Define stages to help the agent accurately identify the correct stage for the opportunities it monitors.

Manage Stage Descriptions



Choose how the agent updates fields

By default, the agent suggests field updates. If you want the user to make the updates autonomously, change the setting.

1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

Search Setup

Search Setup

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Setup

Home

Object Manager

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Feature Settings

Sales

Opportunities

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Agentforce for Sales

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Define Opportunity Stages

Define stages to help the agent accurately identify the correct stage for the opportunities it monitors.

Manage Stage Descriptions



Create Stage Descriptions

If the org uses custom Stage values, create descriptions for each one so that the agent can make accurate suggestions

1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

The screenshot displays the Salesforce Agentforce setup interface. The left sidebar shows the navigation menu with 'Agentforce for Sales' and 'Agentforce Pipeline Management' highlighted. The main content area is titled 'Step 1: Enable Agentforce for Sales' and 'Step 2: Set Agent Behavior'. A modal window titled 'Manage Stage Descriptions' is open, showing the 'Opportunity Record Type' set to 'Masters' and a list of stage descriptions for Prospecting, Qualification, Needs Analysis, Value Proposition, and Id. Decision Makers. The modal also includes 'Stage Description Guidance' and buttons for 'Assign Role', 'Go to Flow Builder', and 'Manage Stage Descriptions'.

Search Setup

Setup Home Object Manager

Q pipe

Feature Settings

Sales

Opportunities

Pipeline Inspection Setup

Agentforce for Sales

Agentforce Pipeline Management

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

Step 1: Enable Agentforce for Sales

Step 2: Set Agent Behavior

Grant Agent Access

Determine the level of access the agent can use call data v

Give Agent Access

Give Agent Access

Save and Activate

Save the Process Flow and criteria for evaluation opportunity team m

more

Set Agent Behavior

Agentforce can either

☒ Suggest actions

☐ Make updates a

Define Opportunity

Define stages to he

Manage Stage Descriptions

Opportunity Record Type

Masters Apply

Stage Descriptions

* Prospecting

This is the initial stage where the sales team identifies and reaches out to potential

* Qualification

In this stage, the sales team assesses the prospect's suitability, determining if they have a

* Needs Analysis

This stage involves a deep dive into the prospect's challenges, requirements, and

* Value Proposition

Here, the sales team articulates the unique benefits and value of the solution to the

* Id. Decision Makers

This stage focuses on pinpointing the individuals within the prospect's organization

Stage Description Guidance

- Describe key steps, actions, account details, and customer activities for each stage.
- Be descriptive! The more information you provide, the better the recommendations.
- Ensure stage descriptions are unique! Avoid any potential overlapping activities.
- Focus on key goals, objectives, and outcomes.

grant the agent permission to access calls, it

On

Assign Role

Go to Flow Builder

Manage Stage Descriptions



Create Stage Descriptions

If the org uses custom Stage values, create descriptions for each one so that the agent can make accurate suggestions

1

Enable Agentforce for Sales

2

Create and Configure

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Runtime & Monitoring

Give Agent Access to Calls Based on User Role ⓘ

[Assign Role](#) ↗**Save and Activate Flow to Get Field Update Suggestions**

Save the Process Field Update Suggestions flow as a new flow, then activate it. The schedule-triggered flow defines the cadence and criteria for evaluating opportunities to include in the agent's work. When the flow runs, the agent user is added as an opportunity team member to eligible opportunities and generates field update suggestions for the relevant opportunity fields. [Learn more](#)

[Go to Flow Builder](#) ↗**Set Agent Behavior**

Agentforce can either provide suggested actions to users or update opportunities autonomously. If you set it to provide suggested actions, users can accept or decline them in Pipeline Inspection.

- ☒ Suggest actions
☐ Make updates autonomously

🔊 To optimize agent performance, confirm that your opportunity stages align with your team's sales processes and definitions, and that each stage includes a detailed description.

Define Opportunity Stages

Define stages to help the agent accurately identify the correct stage for the opportunities it monitors.

[Manage Stage Descriptions](#)**Build Your Agent**

Go to Agentforce Builder to finish setting up Agentforce Pipeline Management. Create an agent from the Sales Management template and add the required topics and actions. Then, test, preview, and edit your agent configuration.

You can manage all of your agents in Agentforce Studio.

[↗ Go to Agentforce Builder](#)[Manage Agents in Agentforce Studio](#)

Create your agent

Your agent is ready to go for now, but it's recommended to create an agent in Agent Builder so that users can use future functionality of Pipeline Management.

Click [Go to Agentforce Builder](#)

1

Enable Agentforce for Sales

2

Create and Configure

3

Test and Preview

4

Runtime & Monitoring

← Agent Creator New Agent ? Help

Steps

1 Select an agent

Select an agent

This determines your agent's role and what they do.

Create from a Template

Create with Gen AI

Search

Inbound Web Agent

Prospect and generate pipeline 24/7 with an autonomous AI agent. Inbound Web Agent intelligently engages website visitors with personalized content, answers common questions, and schedules meetings.

Slack Employee Help

Help employees get answers to questions in Slack. Summarize findings from your company's Slack history and any added knowledge to get answers, or create a Slack canvas with these findings and share them with others.

Agentforce Employee Agent

Automate common business tasks and assist users in their flow of work. Agentforce Employee Agent can search knowledge articles and other data sources. Customize it further to meet your employees' business needs.

Agentforce Service Agent

Data Cloud Agent

Data Cloud Agent

Slack Onboarding

Slack Customer Insights

Agent for Setup

Simplify administrative tasks with Agent for Setup. Customize and manage your org and quickly find documentation with Agent for Setup.

Sales Management

Help sales reps through every step of the sales process. Automate time-consuming tasks such as record updates, get timely and data-informed suggestions, and more. Customize your agent with skills to fit your sales team's needs.

Learn About Agents

Agents are autonomous AI assistants that specialize in specific use cases. They increase productivity and reduce the workload on teams by automating routine tasks and assisting with complex ones.

How do agents work?

Show Me More

What are some benefits of agents?

Show Me More

Choose the agent template

Select the Sales Management template

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Runtime & Monitoring

← Agent Creator New Agent ? Help ▾

Steps

✓ Select an agent

2 Select your topics

3 Customize your agent

4 Select Language and Tone

Select your agent's topics

Topics are the jobs your agent can do. Agents have topics that are pre-selected for you, but you can deselect any you don't want to include. **You can edit topics in a later step.**

User Request Clarification

Handle requests involving ambiguous terms, phrases, or expressions that could be interpreted in multiple ways, particularly in business contexts where jargon is commonly used. When a user's query includes terms like 'Next Steps', determine the specific intent by context - whether they're seeking a suggested field update, strategic advice to close an opportunity or deal, or other business-related guidance. Clarify the interpretation when necessary to provide the most relevant and helpful response.

✓ Added

Field Update Suggestions

Engages and interacts with the user about requests to suggest field updates for various CRM entities such as accounts, contacts, and opportunities. Provides suggestions and recommendations only - does not perform updates.

[See Included Actions](#)

Record Management

Executes confirmed field modifications and retrieves records across CRM entities such as accounts, contacts, and opportunities. Implements final updates through designated action endpoints after user confirmation. This topic is invoked specifically for execution, not for generating update suggestions.

[See Included Actions](#)

Learn About Topics

A topic is a category of actions related to a particular job to be done by agents. Adding topics to an agent helps the agent recognize how to behave and respond for different jobs. Topics contain actions, which are the tools available for the job, and topic instructions, which tell the agent how to make decisions. In sum, topics define your agent's range of capabilities.

Topics also improve the accuracy and conversational quality of an agent's responses. Topics add context to users' requests, such as a user's role and their flow of work.

After creating your agent, you can customize or create custom topics in Agentforce Builder.

Example: Agentforce Service Agent includes standard topics, like Customer Account Management and Order Inquiries, that you can use as a starting point for common use cases. To customize them to meet your unique business needs, add instructions, test your agent, and iterate.

[Learn More in Help](#) ↗

Back

Next

Review the topics

Agent topics and actions define how the agent uses AI capabilities to do specific jobs, like generating suggestions and updating fields.

Here you can see the topics and actions used by the agent.

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**.

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Steps

✓ Select an agent

✓ Select your topics

3 Customize your agent

4 Select Language and Tone

Customize your agent

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

* Name

Sales Management

* API Name

Sales_Management

* Description ⓘ

Help sales reps through every step of the sales process. Automate time-consuming tasks such as record updates, get timely and data-informed suggestions, and more. Customize your agent with skills to fit your sales team's needs.

773 characters remaining

* Role ⓘ

You're an AI Sales agent that helps sales reps throughout the sales process. Your job is to keep records, such as opportunities, up to date, and provide suggestions for updating certain fields such as Next Step or Stage.

35 characters remaining

* Company ⓘ

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

☐ Keep a record of conversations with enhanced event logs to review agent behavior ⓘ [Learn More](#)

Best Practices for Agent Settings

Agent settings determine how an AI agent behaves and presents itself in conversations. Use these best practices to help you write concise and conversational descriptions.

Role

The role setting is the job description for the agent - it tells the agent what role it's playing in your company. Include key responsibilities, functions, and the target audience. Describe key tasks that it performs on a day-to-day basis as well as specialized or one-off tasks. Start the role description with "You are...".

Company

Tell the agent about the company it represents. Describe what your company does, who its target customers are, and the value proposition of important products or services you sell. Add details about what makes your business unique from your competitors.

[Learn More in Help](#) 📄

Describe your agent's job

The Name, Description, and Role fields are pre-filled.

Create a description for the Company field.

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Steps

✓ Select an agent

✓ Select your topics

✓ Customize your agent

4 Select Language and Tone

Select Language and Tone

Select the language and tone of your agent's conversational responses. These settings apply to LLM-generated messages, including error messages and messages that introduce the output of actions. Changes apply to the next conversation.

* Default Language

English

×

☐ Select all available languages.

Select Languages

Available

English (UK)

English (Australian)

French

Italian

German

Spanish

Selected

Tone ⓘ

Casual

▾

Learn About Language Settings

Agents are a representation of your company and a way for customers to interact with your brand on a one-to-one level. Make sure that your agents express your brand accurately by customizing their language settings. In Agent Builder, you can also add topic instructions that help your agents align their communication style with your brand.

Language

Set your agent's default language to the most common language in your customer base. Consider the regions and languages where the Einstein Trust Layer detects and masks sensitive data.

Tone

To ensure a consistent way of speaking, choose an agent tone that aligns with your brand personality.

For example, a formal tone "I am pleased to inform you that your refund is being processed." versus a more casual tone "Good news – your refund is on its way!"

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Choose Language Settings

Choose your preferred languages and tone. These settings only impact how the agent interacts with users conversationally, e.g. in the Agentforce side panel



Testing Your Agent in Action



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Search...

Sales Home Calendar Agentforce SDR Video Calls Conversation Insights Opportunities Account Plans Accounts Leads More

Opportunity
Omega, Inc. - New Business - 128K

+ Follow Log a Call New Task Edit

Account Name: [Omega, Inc.](#) Amount: USD 128,040.65 Close Date: 7/24/2025 Opportunity Score: [Not Available](#) Probability (%): 100% Opportunity Owner: [Sydney Halden](#)

> ✓ ✓ ✓ ✓ Closed Won Change Closed Stage

Activity Details Contacts Products CPQ Notes More

Notes (1)

Meeting with Omega Inc.
7/25/2025, 10:19 AM by Sydney Halden
Date: July 25, 2025 Time: 10:00 AM - 10:30 AM PDT
Attendees: Welo: Sarah Chen (Sales Rep), David Lee...
[View All](#)

Meeting with Omega Inc.

Title: Meeting with Omega Inc. Visibility Set by Record

Compose text

B I U **☰ ☲ ☳ ☴ ☵ ☶ ☷**

Date: July 25, 2025 **Time:** 10:00 AM - 10:30 AM PDT **Attendees:**

- **Welo:** Sarah Chen (Sales Rep), David Lee (Solutions Architect)
- **Omega Inc.:** Robert Johnson (Head of Operations), Emily White (Procurement Manager)

Key Takeaways:

- Omega Inc. is highly interested in Welo's automated inventory management solution to reduce manual errors

Related to: [Omega, Inc. - New B](#)

Delete Share Add to Records Done



Select a test opportunity

Choose the opportunity record(s) you want to test. Ensure the opportunity has at least one of the following grounding data:

- Note created or modified in the last 24 hours
- Email sent in the last 24 hours
- Voice Call or Video Call with transcript created in the last 24 hours

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The screenshot displays the Agentforce Builder interface, specifically the 'Sales Management' section for 'Version 1'. The interface is divided into three main panels:

- Topics Panel (Left):** Contains a list of topics assigned to the agent. The 'Field Update Suggestions' topic is selected. It includes a search bar and a 'New' button.
- Reasoning and Prompt Panel (Center):** Shows the 'User Prompt' and the 'Reasoning' process. The 'Reasoning: Topic Selection' step is highlighted, showing the 'Prompt Used' and the 'Topic Selected: Field Update Suggestions'. Below this, the 'Reasoning: Action Selection' steps are shown, including the 'Prompt Used' and the 'Agent Response'.
- Conversation Preview Panel (Right):** Displays a preview of the conversation. It shows the user's prompt, the agent's response, and a 'Confirmed' button. The agent's response is a JSON object:

```
1 {
2   "message": "Would you like me to suggest the correct stage for the
3   \"Permadyne - New Business - 39K\" opportunity?\",
4   \"data\": [
```



Test the Agent's Suggestions

In Agentforce Builder, provide the agent with an opportunity that has the required grounding data (notes, call transcripts, emails) to test the output quality.

You can also do this in Testing Center to test the output at scale.

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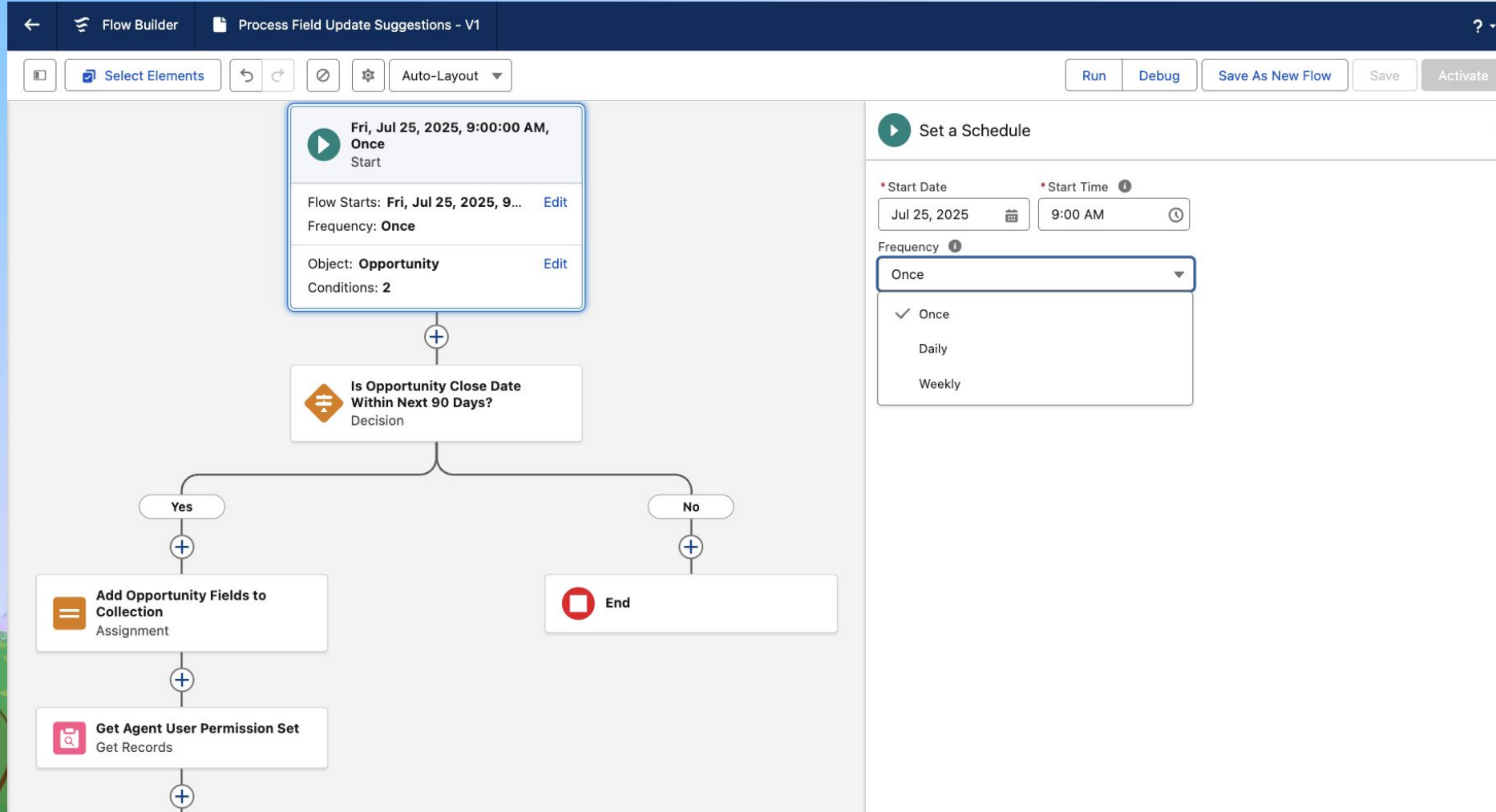
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Run the Flow

To run Pipeline Management across all of your open opportunities, clone the Process Field Update Suggestions Flow.

Set the start date to run Once, Daily or Weekly. Set the start date and time, and activate the Flow.

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Forecasting

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Account Plans

Opportunities

My Opportunities

Inspection

Chart

Open Pipeline

New

Won

Increased

Moved In

Moved Out

Decreased

Lost

Overdue

\$1.9M

\$0

\$4.3M

\$10K

\$30M

\$0

\$0

\$25M

\$5.8M

	Opportunity Name	Opportunity Score	Agent Activity	Amount	Close Date	Account Name	Stage
1	Tech Labs - Add-On...	High	None	\$20,000.00	6/28/2024	Tech Labs	Negotiation
2	*Omega, Inc. - New B...	High	Needs Review	\$25,000.00	6/30/2024	Omega, Inc.	Proposal/
3	AJC Corporation 503...	High	Updated	\$400,000.00	7/05/2024	AJC Corporation	Discovery
4	General Utilities 5038...	Med	None	\$14,000.00	7/08/2024	General Utilities	Qualificati
5	Wellspring, Inc. 3812...	High	Updated	\$100,000.00	7/11/2024	Wellspring, Inc.	Qualificati
6	Gusto Manufacturing...	Med	Needs Review	\$30,000.00	7/25/2024	Optos, Inc.	Discovery
7	Missoula & Sons Inc...	High	None	\$69,000.00	7/15/2024	Haven Enterprises	Qualificati
8	Optos Inc. 4128 - Ad...	High	None	\$22,000.00	7/18/2024	Display Tech	Negotiation
9	Haven Enterprises 48...	High	Updated	\$37,000.00	7/22/2024	Anaco Limited	Proposal/
10	Displaytech 3888 - A...	Med	Needs Review	\$43,000.00	7/26/2024	Allied Technologies	Discovery
11	PortalAccount 5065 - ...	Med	Updated	\$15,000.00	7/30/2024	Upstyle, Inc.	Negotiation
12	Southern Solutions -...	High	None	\$23,000.00	8/01/2024	Plasmosis, Inc.	Qualificati
13	Silodyne Company -...	High	Updated	\$71,000.00	8/04/2024	Grub Hub	Negotiation

*Omega, Inc. - New Business - 128K

Opportunity Score: High

Closing In: 32

Days in Stage: 3

Push Count: 5

Overview

Agentforce

Activity

For Review: 1

Updated: 3

Filters: Last 30 days • All Agents

Accept All • Dismiss All

Pipeline Agent

Update Stage

Proposal to Negotiation

In a recent call with Amanda L., the TechSpeed team indicated interest in implementation support for an additional \$10,000 on top of the agreed upon price.

Accept

Edit

Decline

Sources (2)

1 Pricing Discussion • Call

2 Revised Quote • Email



Review Agent Suggestions in Pipeline Inspection

Users with access to opportunity records can review the agent's suggestions in Pipeline Inspection.

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Agent Activity Status	Description
Review Suggestions	The agent has made one or more field update suggestions
Updated	A user (either human or agent) has accepted the field update suggestion
None	No field update suggestions have been made by the agent
Not Assigned	The agent is not assigned to the opportunity via the Opportunity Team



Add Opportunity Team Members

 Team members' access level for this opportunity may be greater than your organization's default opportunity access settings.

	*User	*Team Role	*Opportunity Access	
1	SalesManagementAgent User		Read/Write	
2			Read Only	
3			Read Only	



Troubleshoot Agent Activity Statuses

If suggestions are found by the agent, the status will be “Needs Review” or “Updated”.

If the status is “None”, then no updates were found. Check that the opportunity has the required grounding data.

If the status is “Not Assigned”, then the agent does not have access to the opportunity. Add the SalesManagementAgent User to the opportunity team with Read/Write access.

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Setup Home Object Manager

Search Setup

Search flow

Flow Interviews

All Flow Interviews

32 items • Sorted by Name • Filtered by All flow interviews • Updated a few seconds ago

Na...	Last Modified By	Last Modified ...	Int...	Flow Interview Guid	Flow API Name	Flow Version	Type	Current
00000023	shalden	6/17/2025, 10:20 AM	Failed	6229d92c0a88e858295422b7d0031977cbde2ed-29...	Deal_Agent_Test_1	1	Autolaunched Flow	Deal...
00000024	shalden	6/17/2025, 10:20 AM	Failed	67444bdbb1b9fab8a64c5c4b391a1977cb66956-2bc0	Deal_Agent_Test_1	1	Autolaunched Flow	Deal...
00000025	shalden	6/17/2025, 10:36 AM	Failed	42321719e4ebb2075f3a85c64a1977a485aa4-4971	Deal_Agent_Test_1	1	Autolaunched Flow	Deal...
00000026	shalden	6/17/2025, 10:59 A...	Failed	866014429ed32e1d9ef164512f4c1977a4838f4-44b6	Deal_Agent_Test_1	2	Autolaunched Flow	Deal...
00000027	shalden	6/17/2025, 10:59 A...	Failed	8838fe70fbae6e4a47b7bdd285f1977a5d3087-44b0	Deal_Agent_Test_1	2	Autolaunched Flow	Deal...
00000028	smith	6/17/2025, 5:10 PM	Failed	1350ddc825dbdb96279e6af0884c1977fea6231-700e	Inbound_Web_Lead_Generati...	1	Autolaunched Flow	Inbou...
00000029	smith	6/17/2025, 5:14 PM	Failed	541370fda448f3520933669924c1977fea8737-693f	Inbound_Web_Lead_Generati...	1	Autolaunched Flow	Inbou...
00000030	smith	6/17/2025, 5:18 PM	Failed	588ed9e53e12882c44f16f42a1977fea7305-71f8	Inbound_Web_Lead_Generati...	1	Autolaunched Flow	Inbou...
00000031	smith	6/17/2025, 5:18 PM	Failed	534c069e883ce8affac75b75e891977fea48ab-7244	Inbound_Web_Lead_Generati...	1	Autolaunched Flow	Inbou...
00000032	smith	6/17/2025, 5:25 PM	Failed	561370fda448f3520933669924c1977fea8737-6845	Inbound_Web_Lead_Generati...	1	Autolaunched Flow	Inbou...
00000033	smith	6/17/2025, 5:25 PM	Failed	1451897cd2970a37bef718a3aaa197805f091d-7e10	Inbound_Web_Lead_Generati...	1	Autolaunched Flow	Inbou...
000000...	smith	6/17/2025, 8:17 PM	Failed	308ada6304d22aefa08639a73e419780c72c0c-7844	Inbound_Web_Lead_Generati...	1	Autolaunched Flow	Inbou...
00000035	smith	6/17/2025, 9:23 PM	Failed	11661897cd2970a37bef718a3aaa197805f091d-63be	Inbound_Web_Lead_Generati...	1	Autolaunched Flow	Inbou...

Apps

- Lightning Bolt
- Flow Category
- Workflow Services
 - Batch Management
 - Data Processing Engine
 - Monitor Workflow Services
- Einstein
 - Einstein Generative AI
 - Flow Creation with Einstein
- Process Automation
 - Automation Home (Beta)
 - Flows
 - Migrate to Flow
 - Paused And Failed Flow Interviews
 - Process Builder
- Workflow Actions
 - Email Alerts
 - Field Updates
 - Knowledge Action
 - Outbound Messages
 - Send Actions
 - Tasks
 - Workflow Rules
- Identity
 - Login Flows

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



Monitor Flows

If no suggestions appear in Pipeline Inspection, check that your Flow ran successfully. In Setup, search for Paused and Failed Flow Interviews.

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The screenshot shows the Salesforce Setup interface. On the left is a navigation sidebar with icons for Home, Sales, Service, Marketing, Data Cloud, Commerce, and Revenue Cloud. The main content area is titled 'Einstein Feedback and Monitoring Setup'. It includes a search bar at the top with the text 'einstein genera'. Below the search bar, there's a section for 'Data Cloud Status' showing 'Enabled' with a link to 'Data Cloud Home'. A warning message states: 'Some actions may consume Data Cloud Storage or credits. Learn More'. The 'Feedback' section is toggled 'On' and describes collecting and storing Einstein generative AI audit and feedback data. The 'Prompt Builder Usage and Feedback Metrics (Beta)' section is also toggled 'On' and mentions that data cloud credits will be consumed. The 'Agent Analytics' section is toggled 'On' and explains that it stores agent usage, user input, and engagement data in Data Cloud, with a note that turning it on consents to storing data in Data Cloud.

Setup | Home | Object Manager

Search Setup

Q: einstein genera

SETUP

Einstein Feedback and Monitoring Setup

Data Cloud Status: Enabled. [Data Cloud Home](#)

Data Space

Some actions may consume Data Cloud Storage or credits. [Learn More](#)

Feedback

Collect and store Einstein generative AI audit and feedback data for analysis, making prompt improvements, and training your large language models (LLMs). Audit and feedback data is stored in the Data Cloud data space of your choice.

By turning on Feedback, you consent to store your data in Data Cloud. Consent also assumes you've reviewed and accepted any cost implications. If you disable data collection, any data previously gathered is retained. You can resume data collection at any point.

[Learn more about data collection and usage](#) [Learn more about audit and feedback dashboards](#)

Prompt Builder Usage and Feedback Metrics (Beta)

Enable user feedback and metrics in Prompt Builder. [Data Cloud credits](#) will be consumed. [Learn More](#).

Prompt Builder Usage and Feedback Metrics is a pilot or beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the [Product Terms Directory](#). Use of this pilot or beta service is at the Customer's sole discretion.

Agent Analytics

Agent Analytics data collection stores agent usage, user input, and engagement data in Data Cloud.

By turning on Agent Analytics, you consent to store your data in Data Cloud. Consent also assumes you've reviewed and accepted any cost implications. If you turn off data collection the data already collected is retained, but no additional data is stored.

Some Agent Analytics features, such as Utterance Analysis, include user feedback. Turn on Einstein Generative AI Audit Data to use all of the Analytics features.

[Learn more about data collection and usage](#)



Enable Agent Analytics

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



Customize Your Agent

Pipeline Management



Agentforce for Sales Pipeline Management

Recommended Customizations Checklist to Further Tailor Agentforce to Your Needs



Customization	Level of Effort	Level of Impact	Benefit	Where to customize
Connect external data sources like Gong	High	High	Rich data source to provide more accurate updates on your CRM records	Control what grounding data is used for Pipeline Management by customizing the flow called “ Get Opportunity Grounding Data ”
Use Pipeline Management to update custom text fields on Opportunities	Medium	High	Expand the breadth of work that Pipeline Management can perform for sellers.	<p>Reference the OOTB Flows and prompt templates to help you create custom scenarios. For instance, you can:</p> <ol style="list-style-type: none">1. Modify the <u>Process Field Update Suggestions Flow</u> by adding fields to the <u>Add Opportunity Fields to Collection</u> node in the flow.2. Create a prompt similar to <u>Recommend Next Step for Opportunity</u>, for the new field you want to manage with Agentforce.

Pipeline Management

Out of the Box Prompt Templates

Recommend Next Step for Opportunity

Suggests strategic next steps for advancing an opportunity based on related information such as emails, notes, and call transcripts.

Recommend Stage for Opportunity

Suggests a stage for an opportunity based on related information, such as emails, notes, and call transcripts.