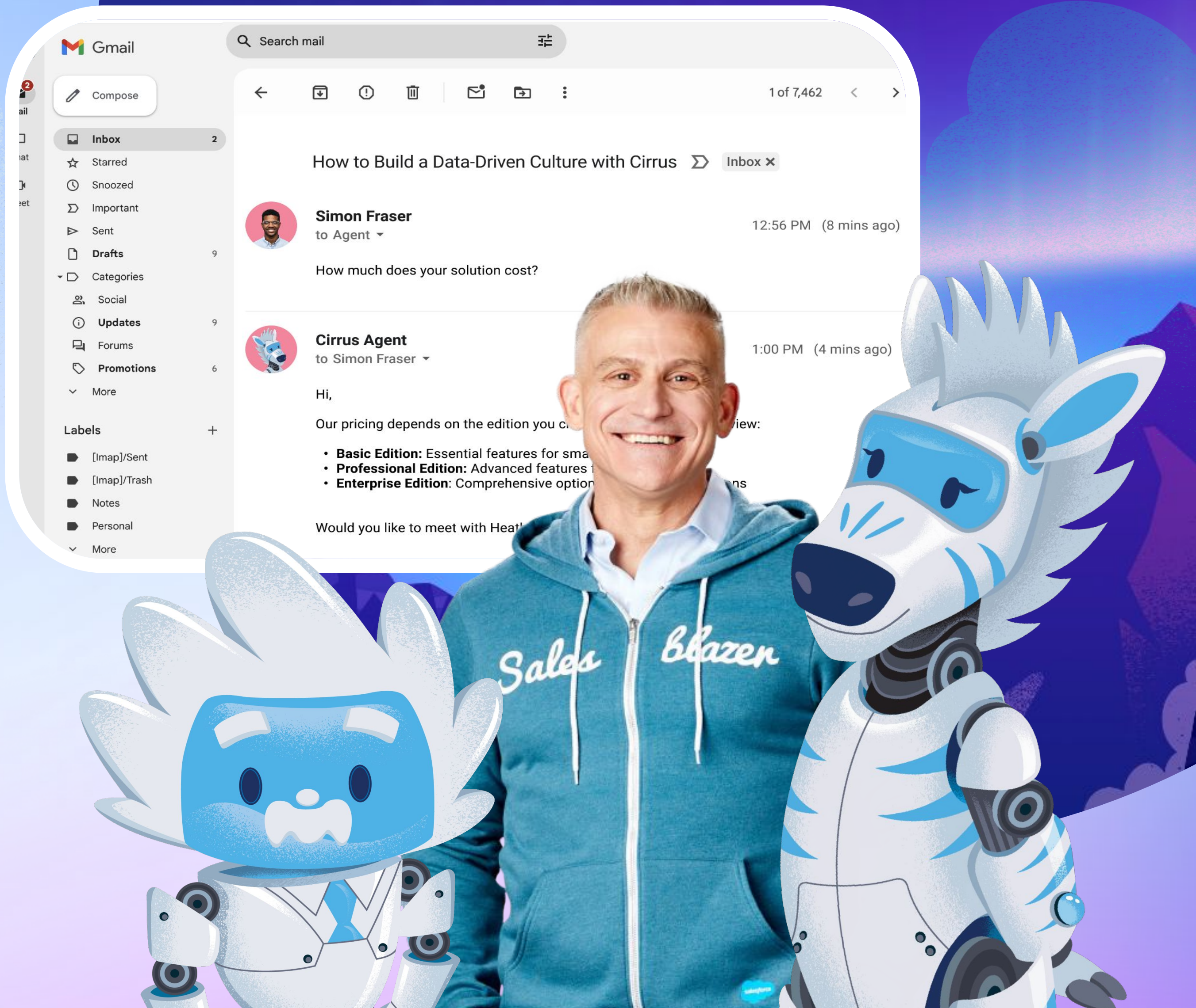
salesforce

Introducing

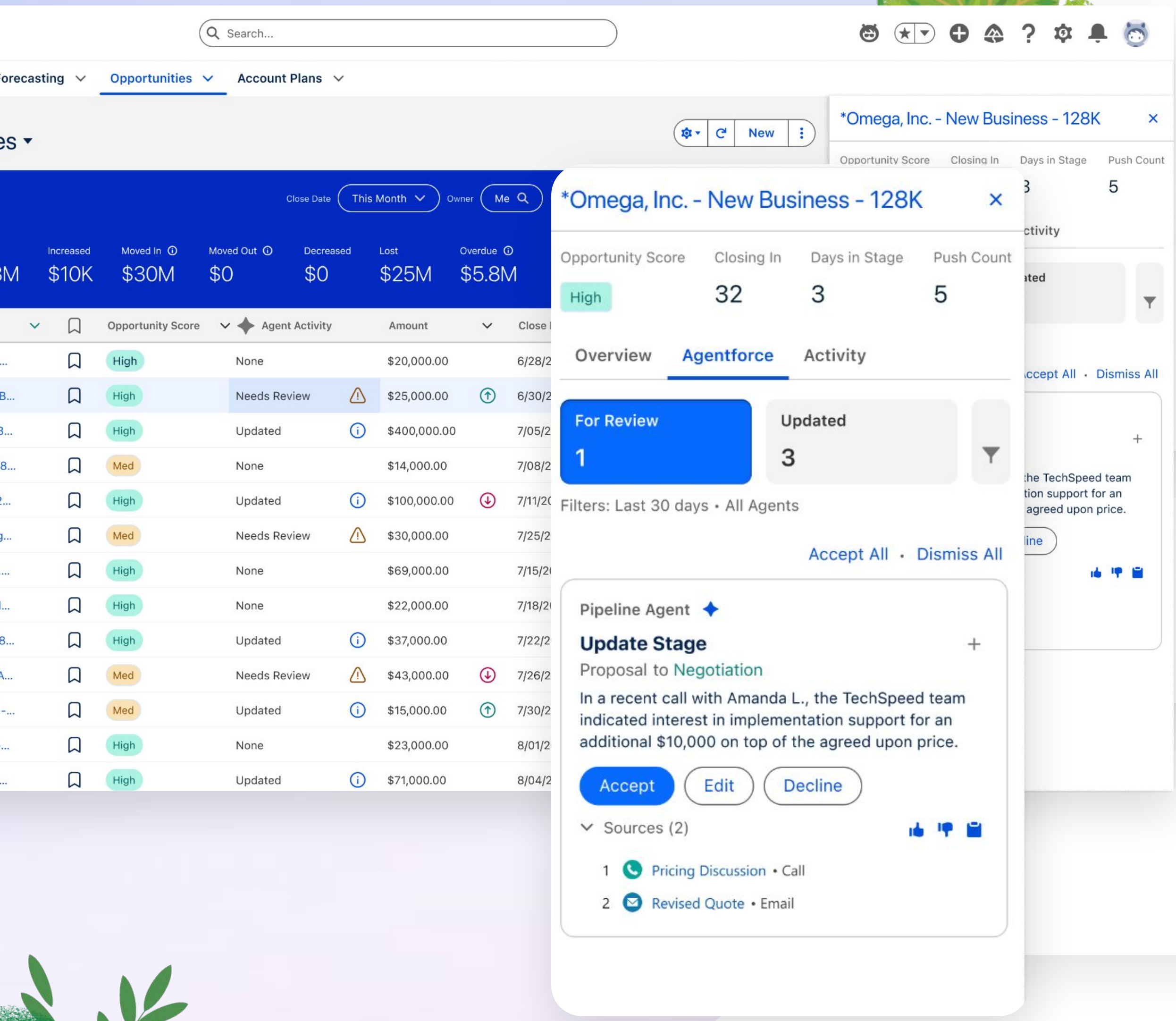
Agentforce for Sales

Autonomous agents to scale your sales team

June 2025



Agentforce for Sales
Pipeline Management



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

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Starts with…

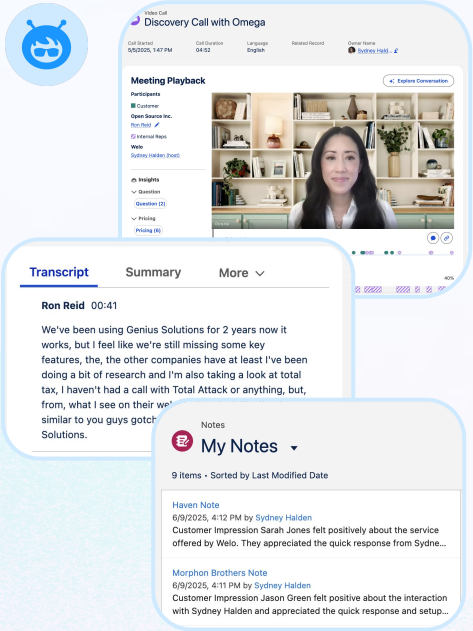
Seller Works Deal while Agent Tracks Deal Changes

Seller and deal activity captured

- Seller Notes
- Customer Meetings
- Emails
- Calls

Synthesizes Data

Agent Synthesizes Conversation Data & Notes



Identifies Updates

Agent Identifies Next Best Action to Progress Deal

Select appropriate next steps based on deal stage.

- Update Opportunity Stage
- Next Steps
- Custom Fields

Outcome

Agenforce 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)

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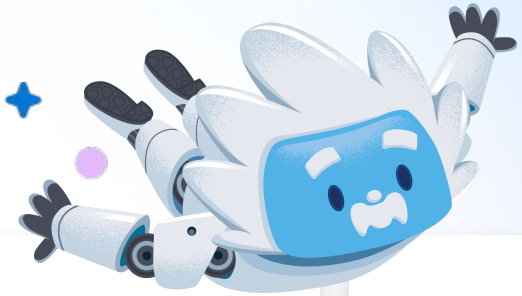
The 5 attributes of a sales agent



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

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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

Agentforce

Topic	Description	Actions
Field Update Suggestions	Engages and interacts with the user about suggestions to update a field.	• Suggest Next Step for Opportunity • Suggest Stage for Opportunity
Record Management	Assists users with identifying records to update and performing create/update operations.	• Query Record • Update Record Fields

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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

Agentforce

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	• 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	• UseAgentforcePipelineManagement	Allows sales rep to edit and accept suggestions made by the Pipeline Management Agent.
Agent User	• PipelineManagementAgentAutonomousUser • SalesManagementAgentAutonomousUserViewAllCalls	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	• Agentforce Default Admin • Prompt Template Manager • Manage 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

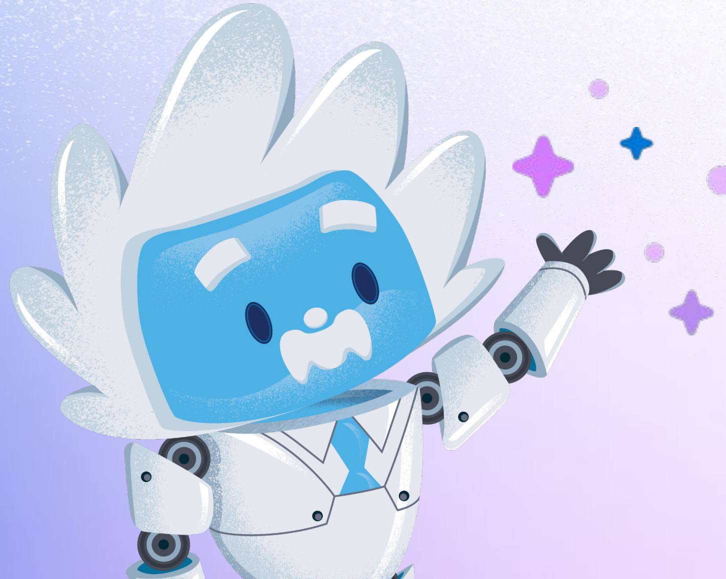
Plan for Success

- ❑ 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.

Agentforce

Create Your Agent

Pipeline Management



Pipeline Management Set Up Overview

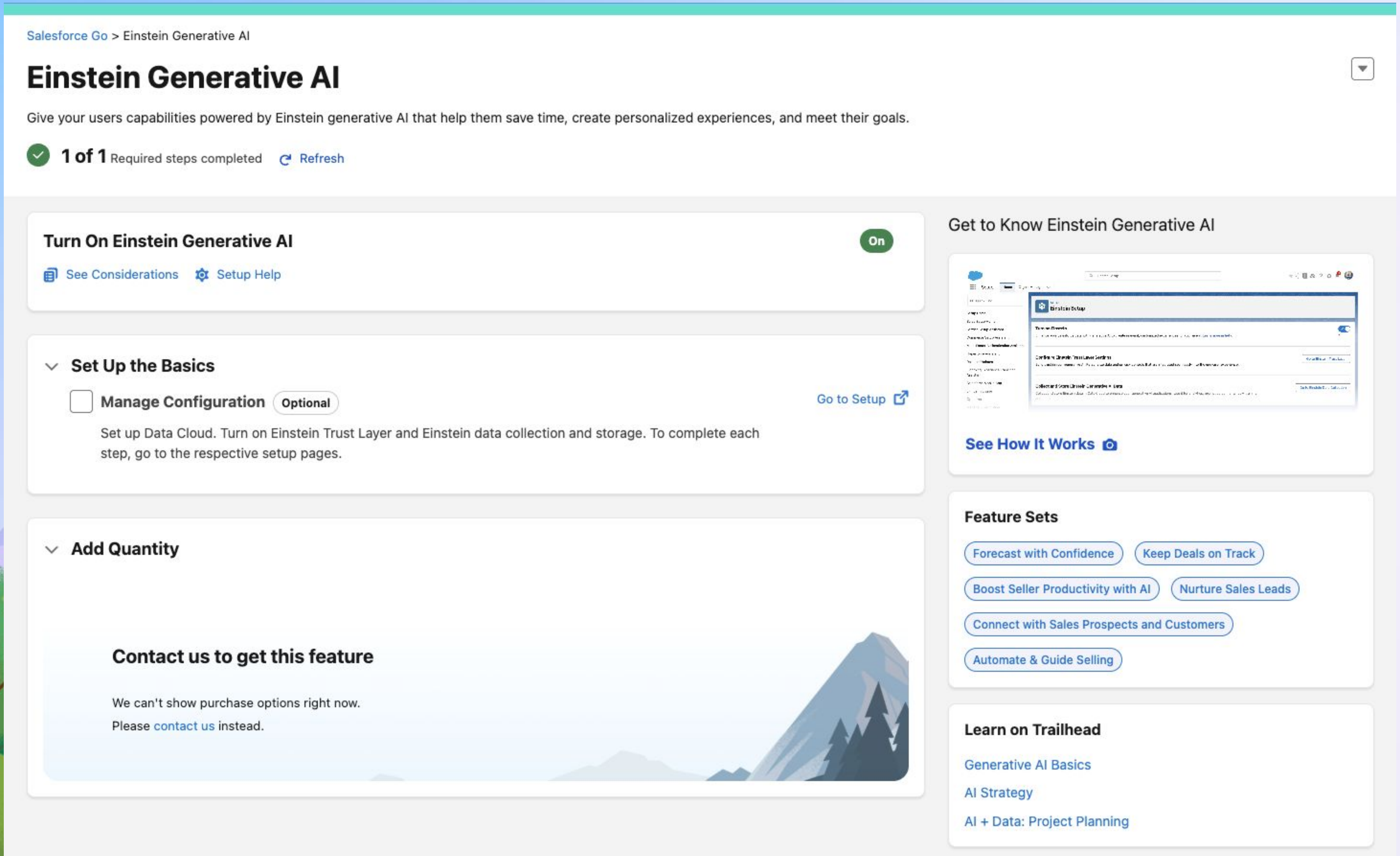
1. **Enable Agentforce for Sales**
   Enable required features and complete prerequisite setup steps

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



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

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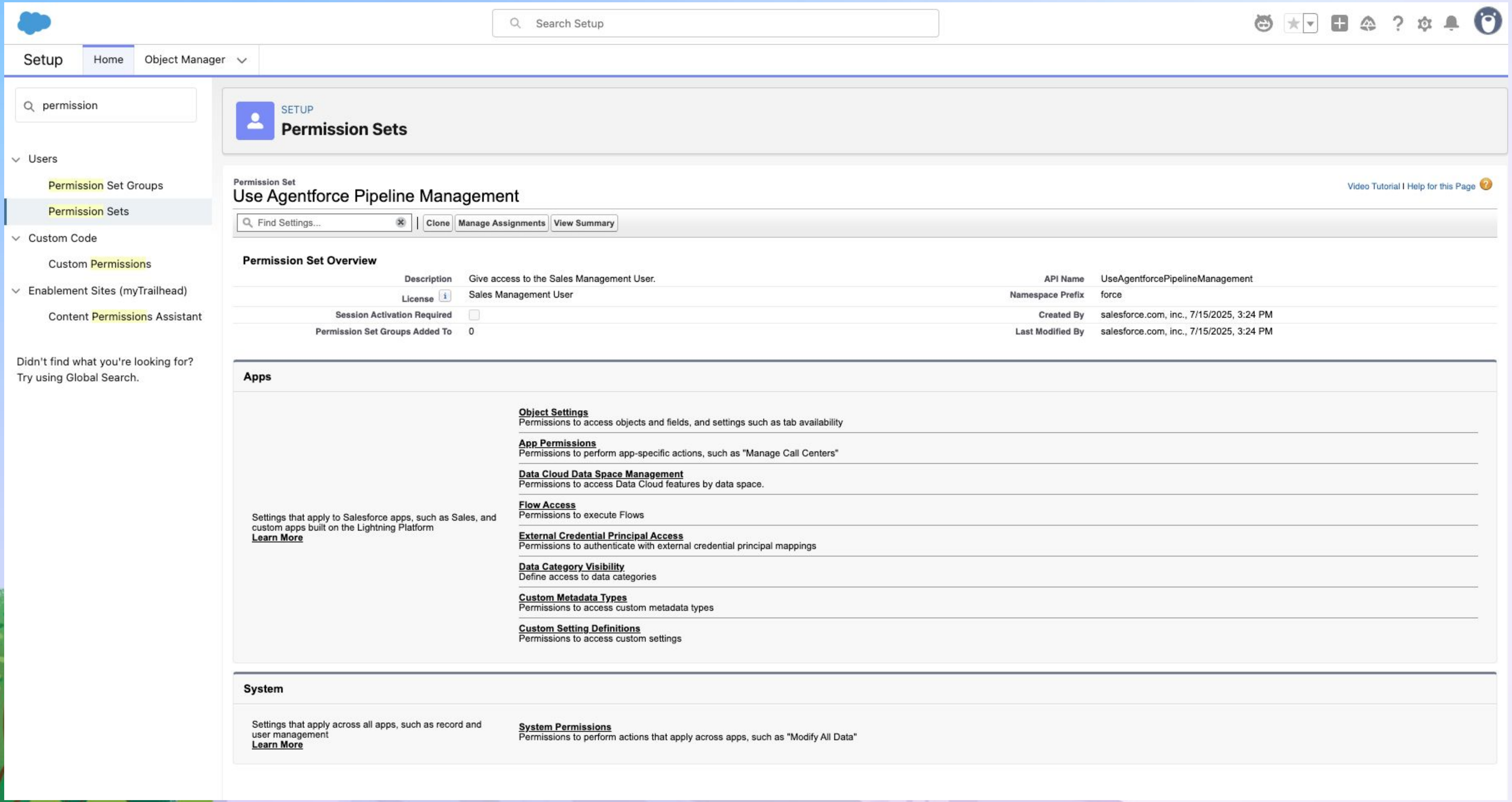
4 Runtime & Monitoring



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
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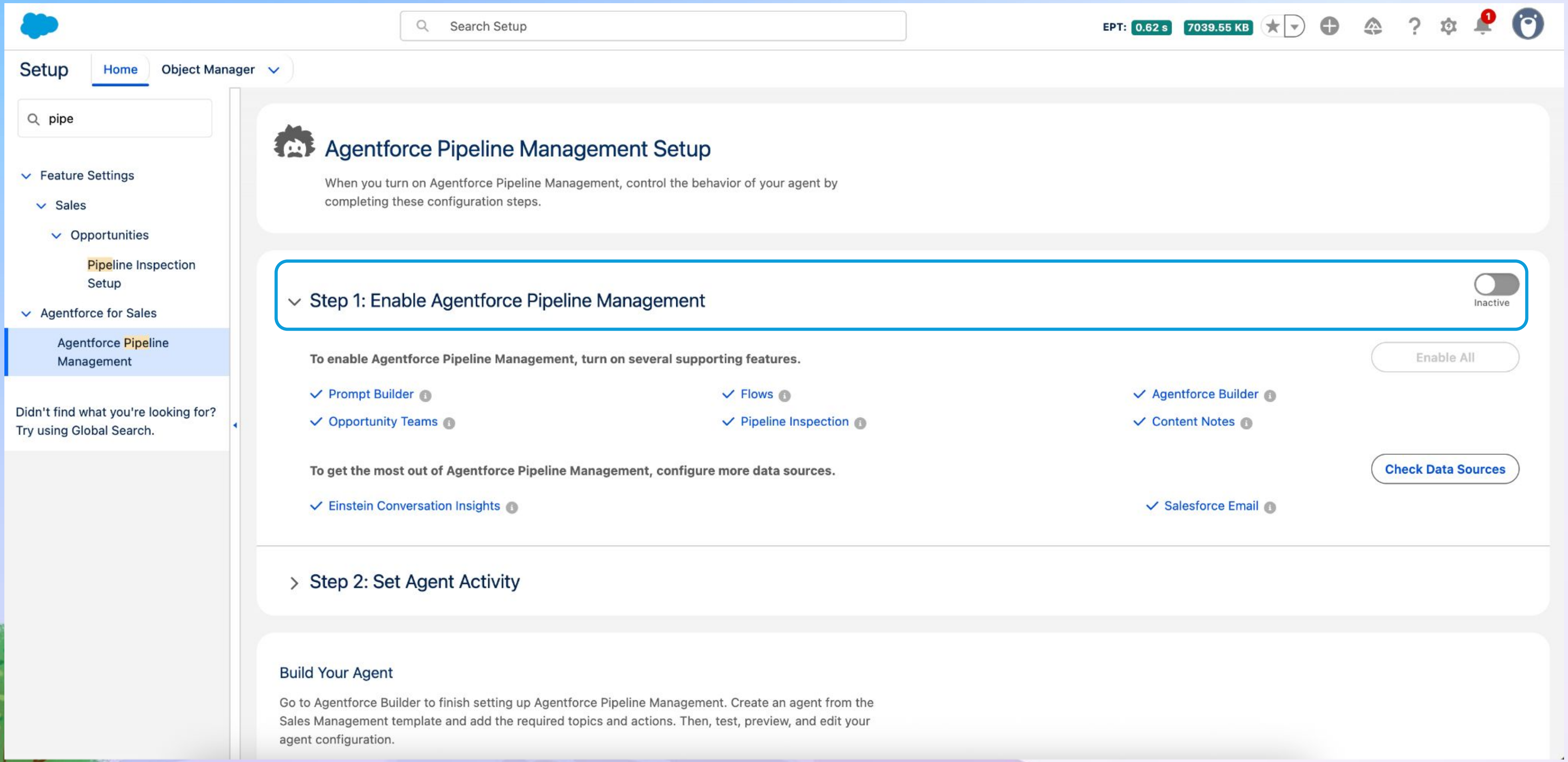

Turn on Pipeline Management

In Setup, search for Agentforce Pipeline Management

Enable the feature

1 Enable Agentforce for Sales

2 Create and Configure

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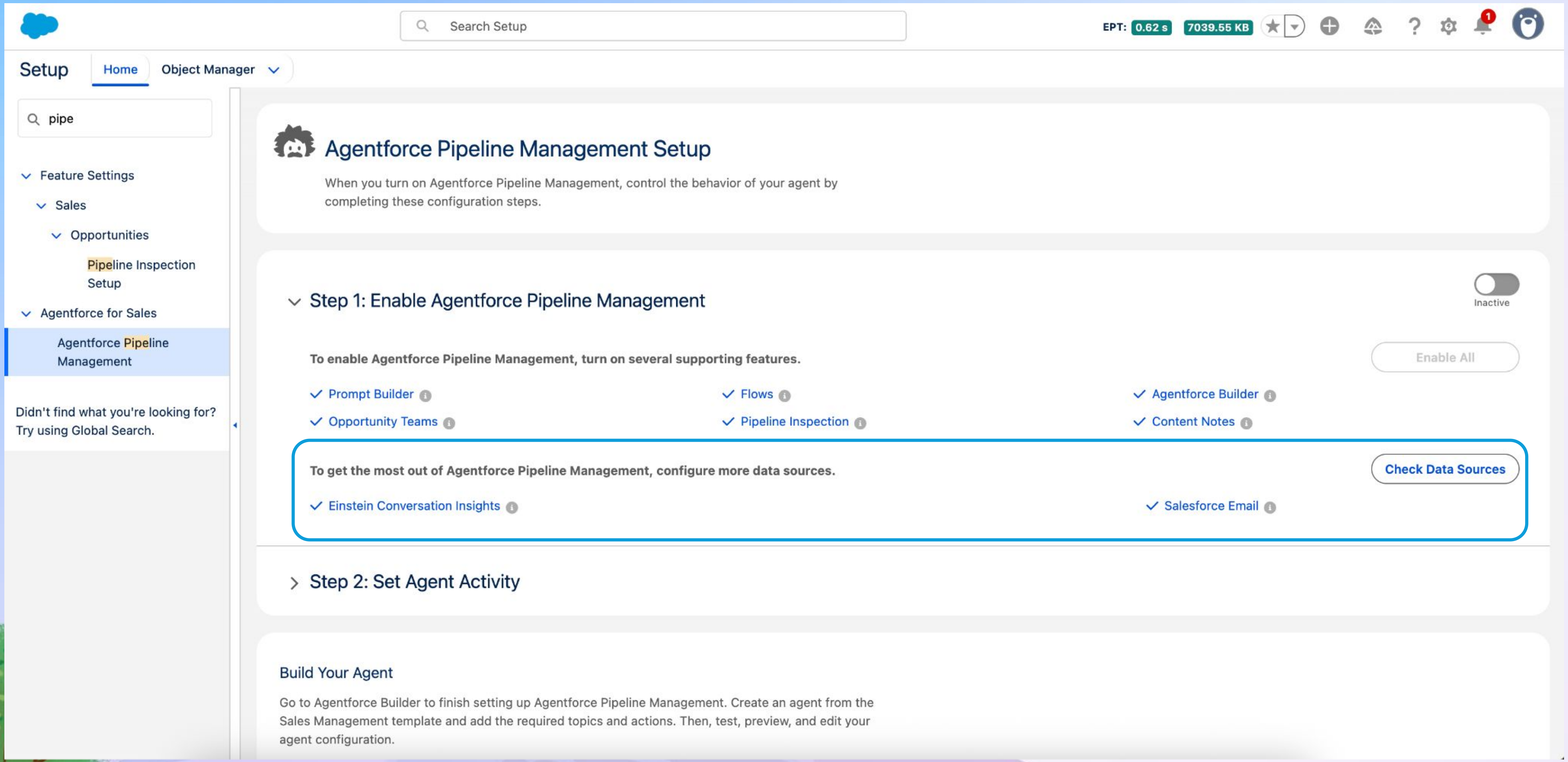
4 Runtime & Monitoring



Turn on Recommended Features

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

1 Enable Agentforce for Sales

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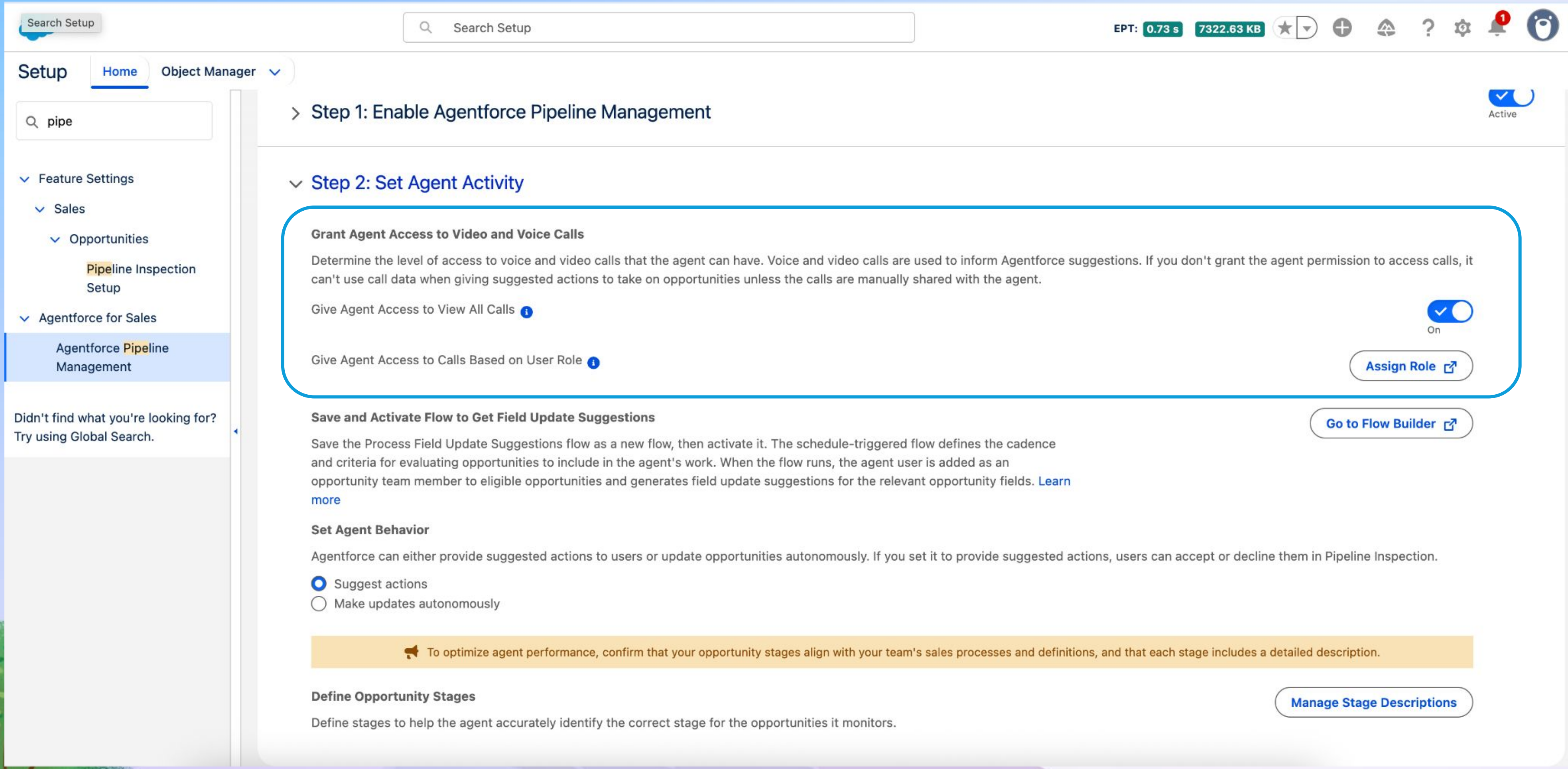

Grant Agent Access to Calls

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

1 Enable Agentforce for Sales
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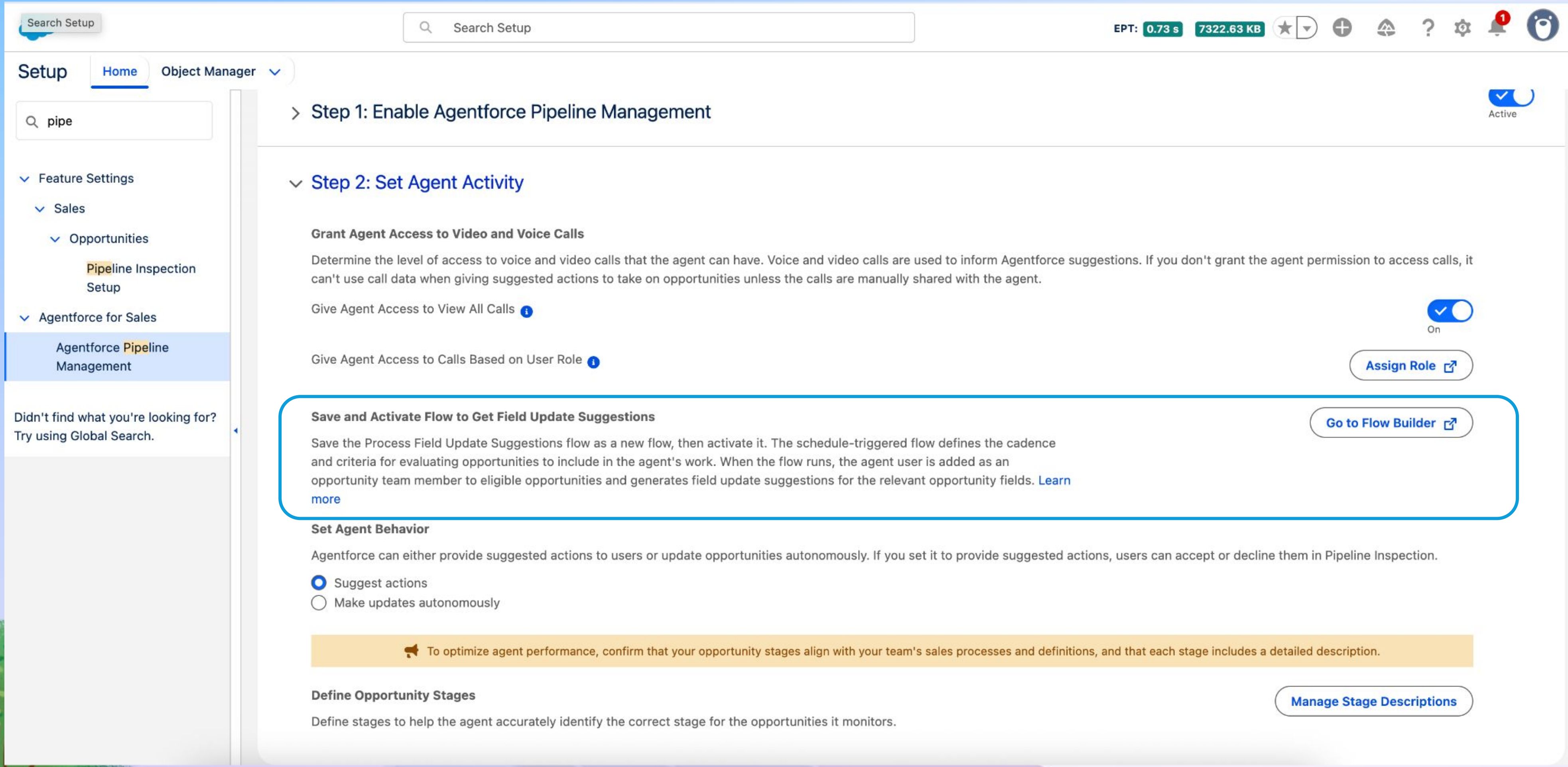
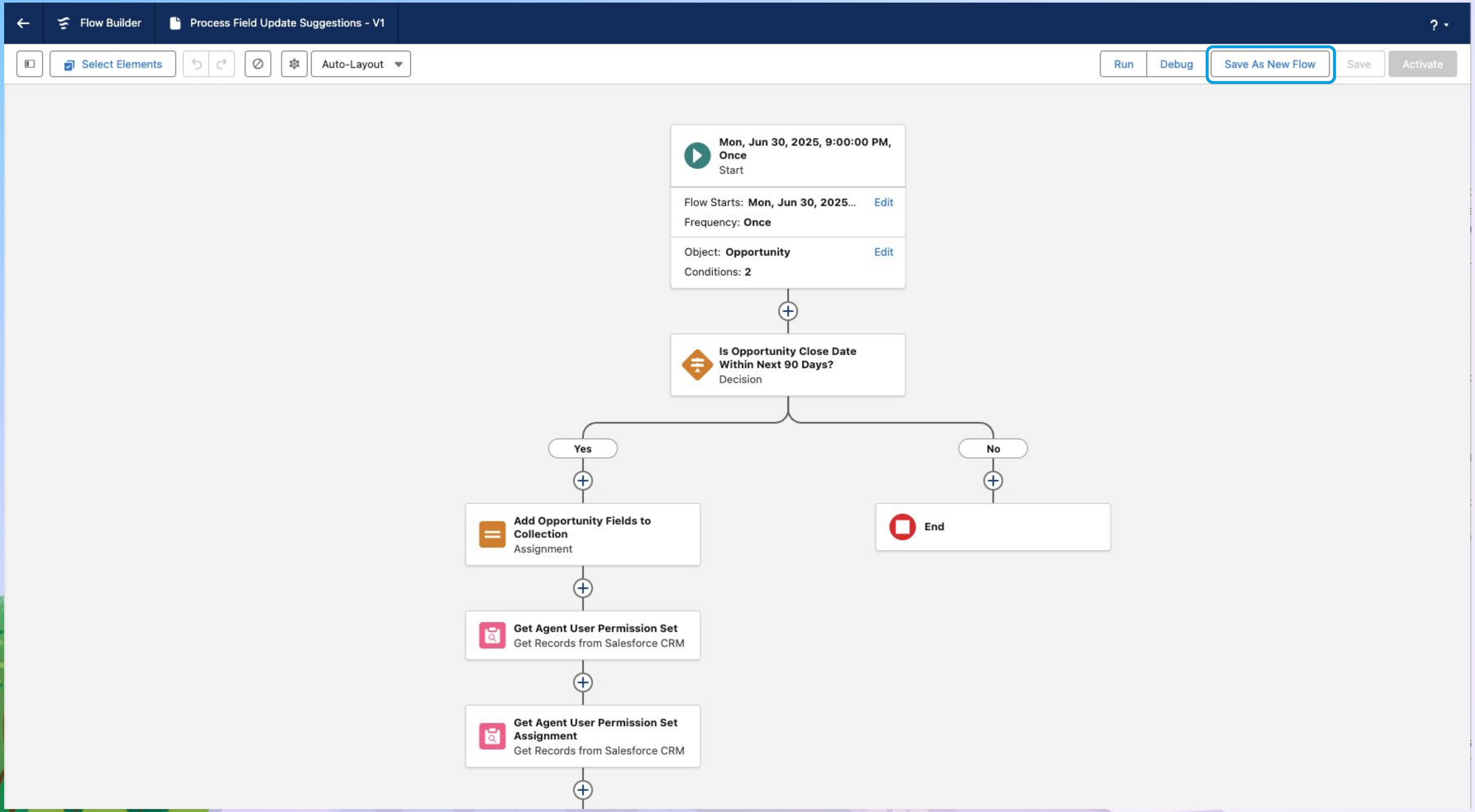


Activate the Flow

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



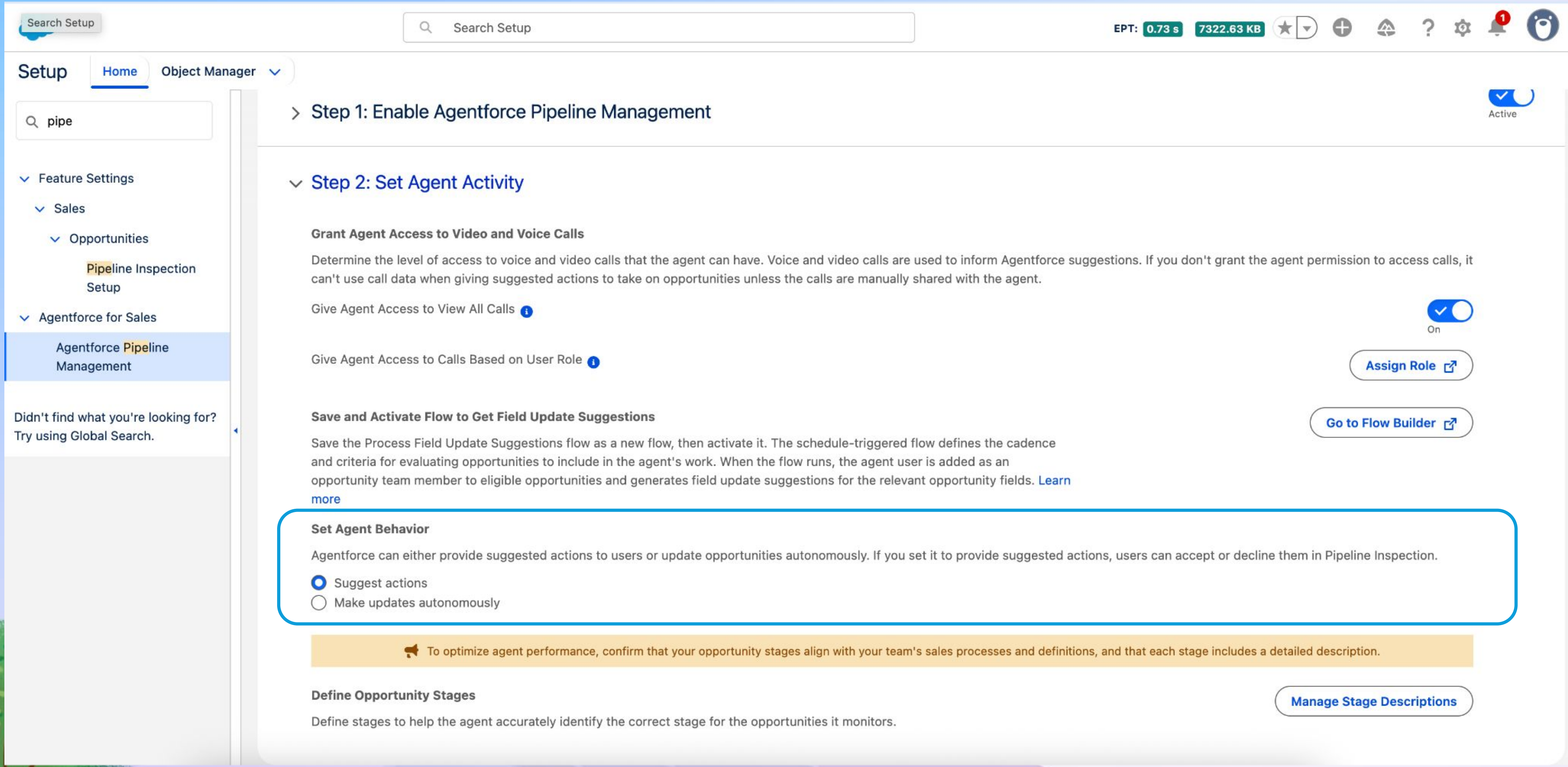
Activate the Flow

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



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

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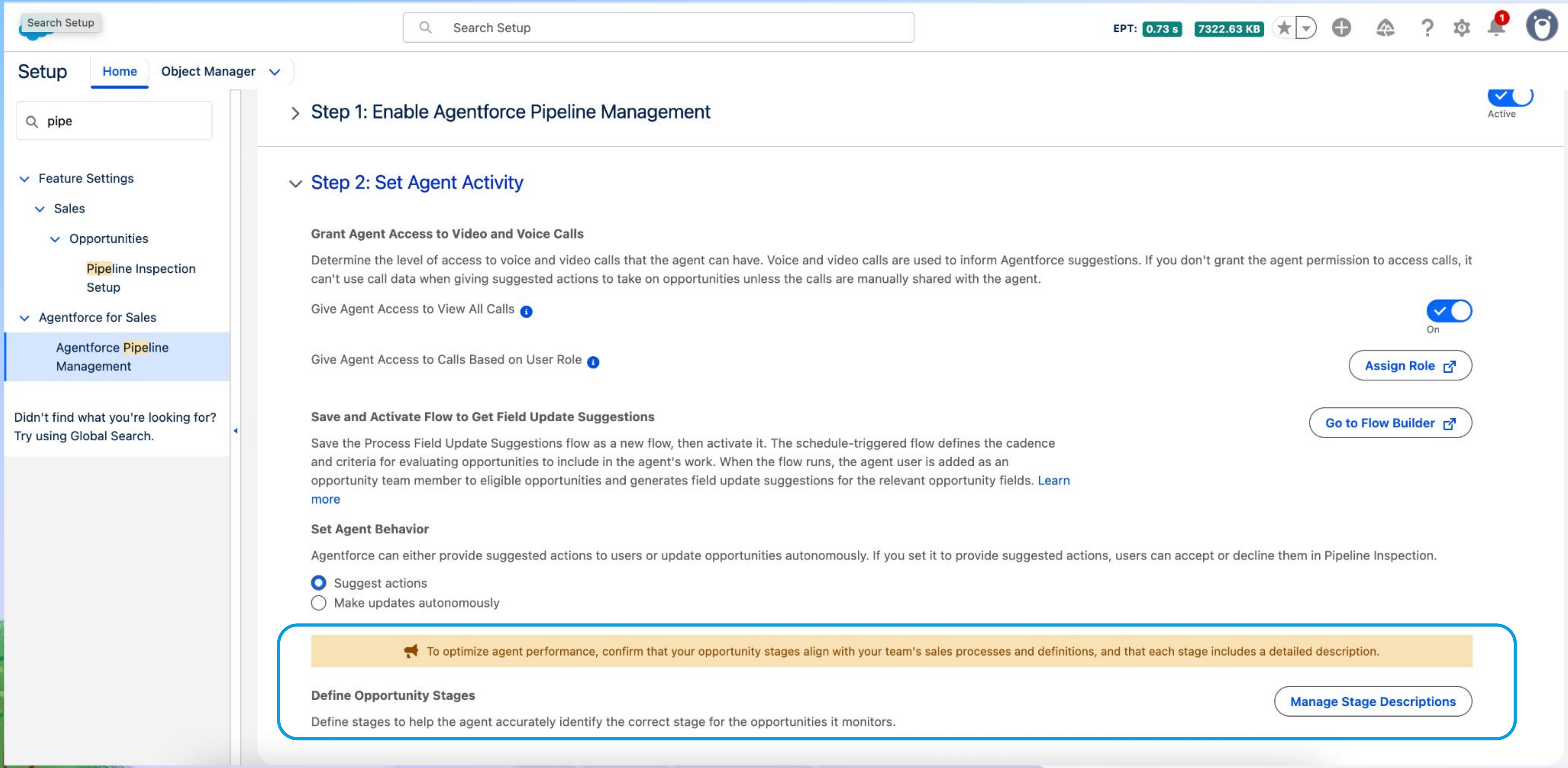

Create Stage Descriptions

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

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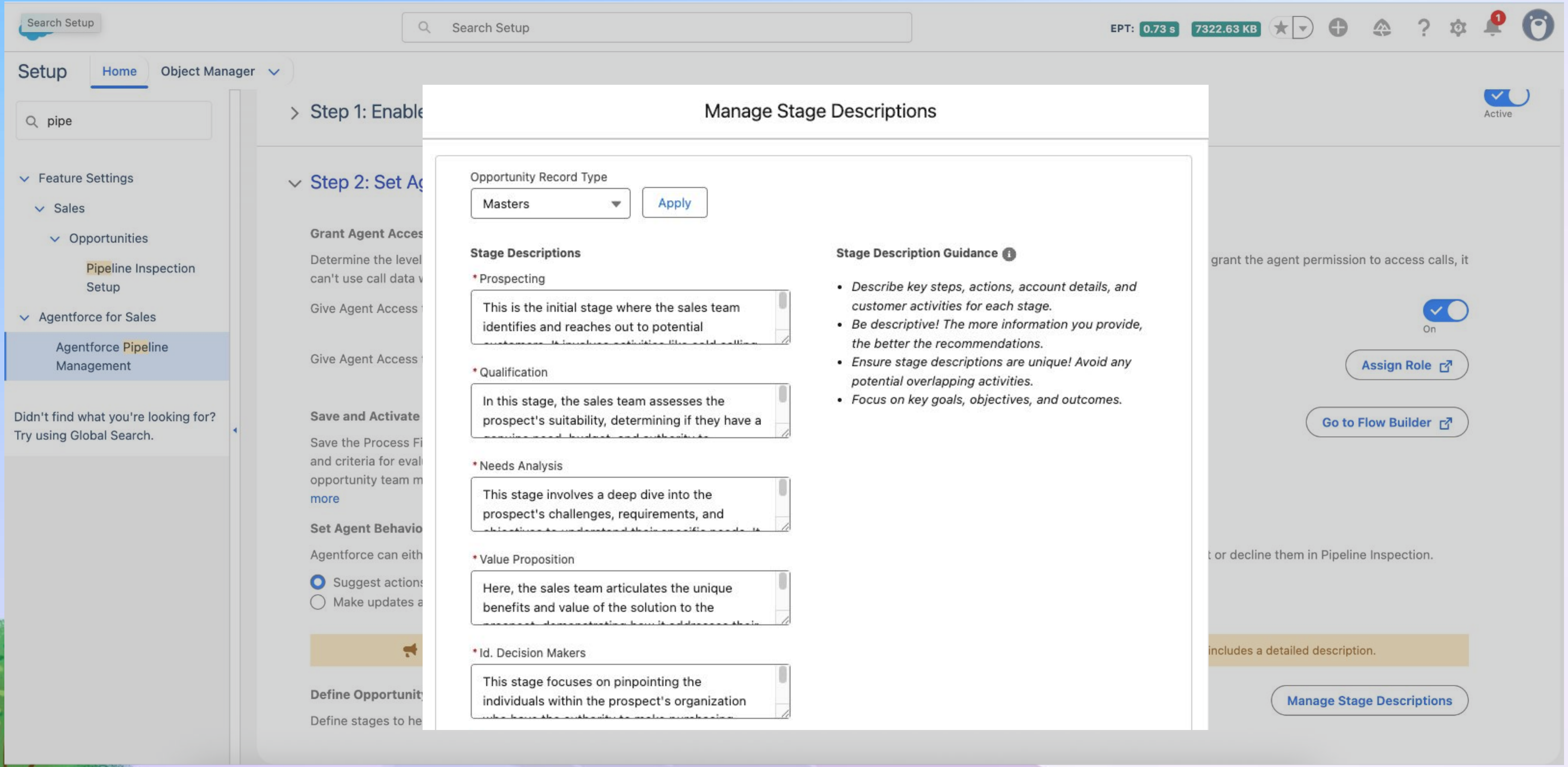

Create Stage Descriptions

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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**

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

1 Enable Agentforce for Sales

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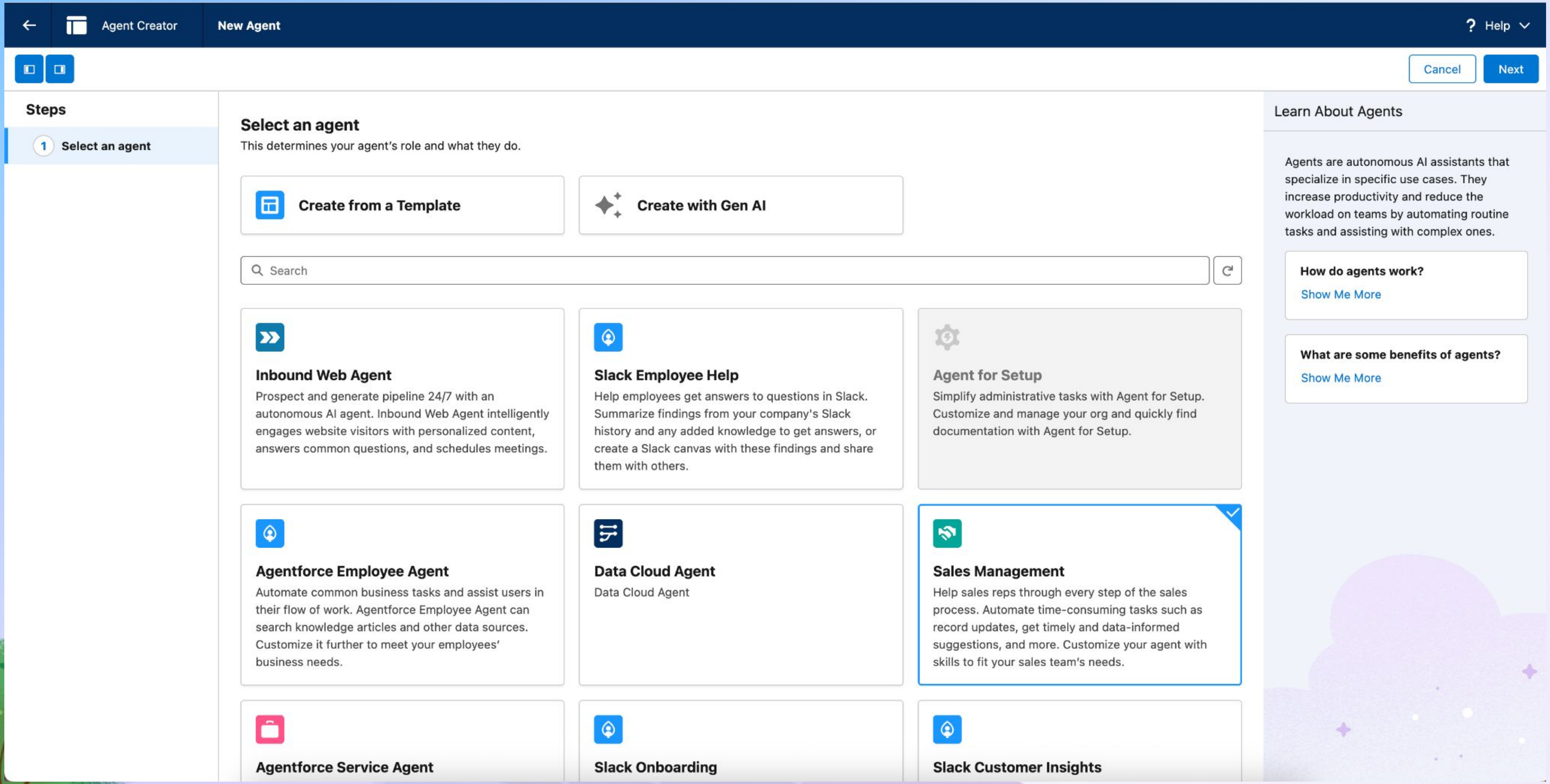

Choose the agent template

Select the Sales Management template

1 Enable Agentforce for Sales

2 Create and Configure

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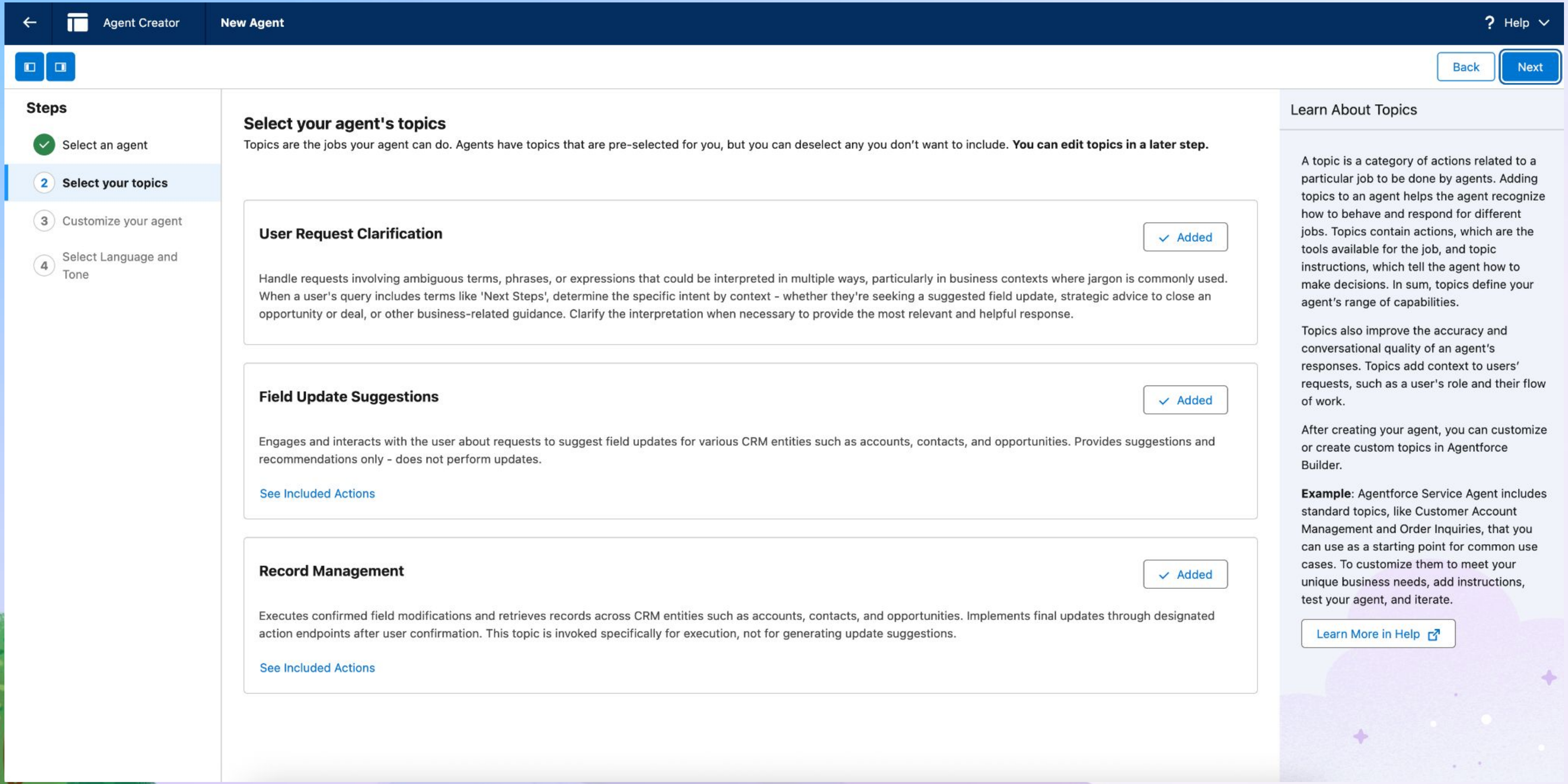

Review the topics

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**.

1 Enable Agentforce for Sales

2 Create and Configure

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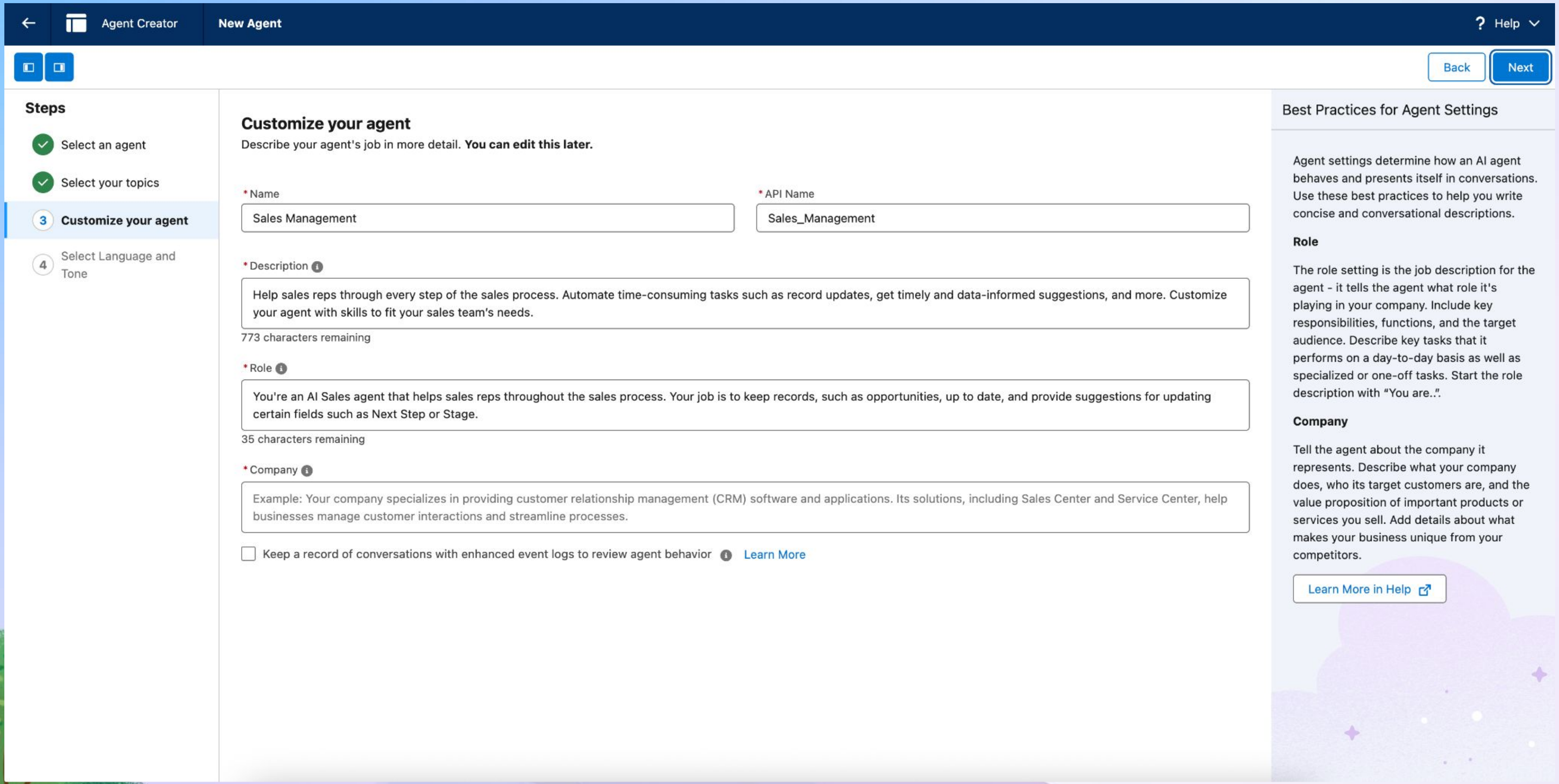

Describe your agent's job

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

Create a description for the Company field.

1 Enable Agnetforce for Sales

2 Create and Configure

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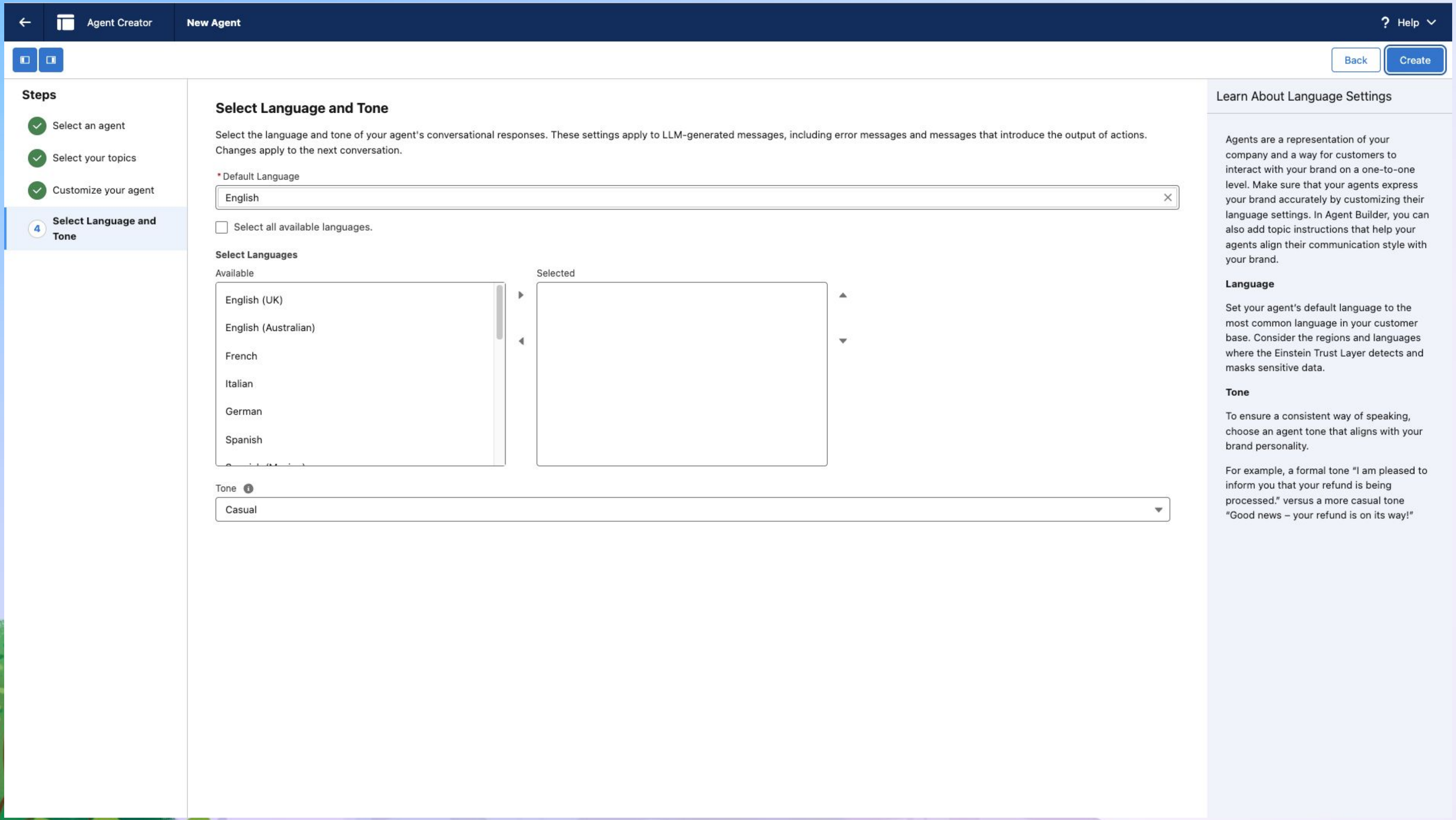
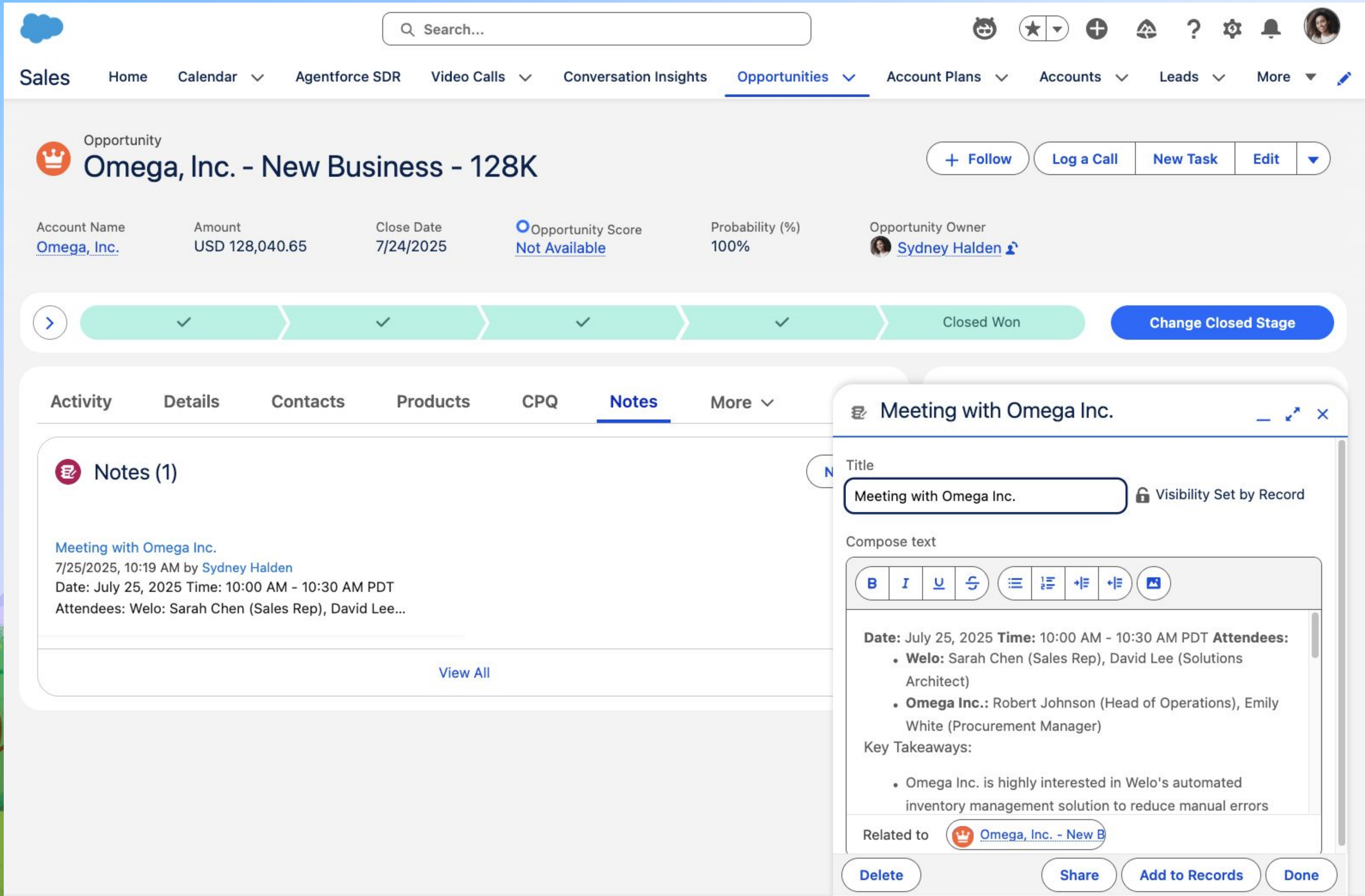


Choose Language Settings

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

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



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

1 Enable Agentforce for Sales

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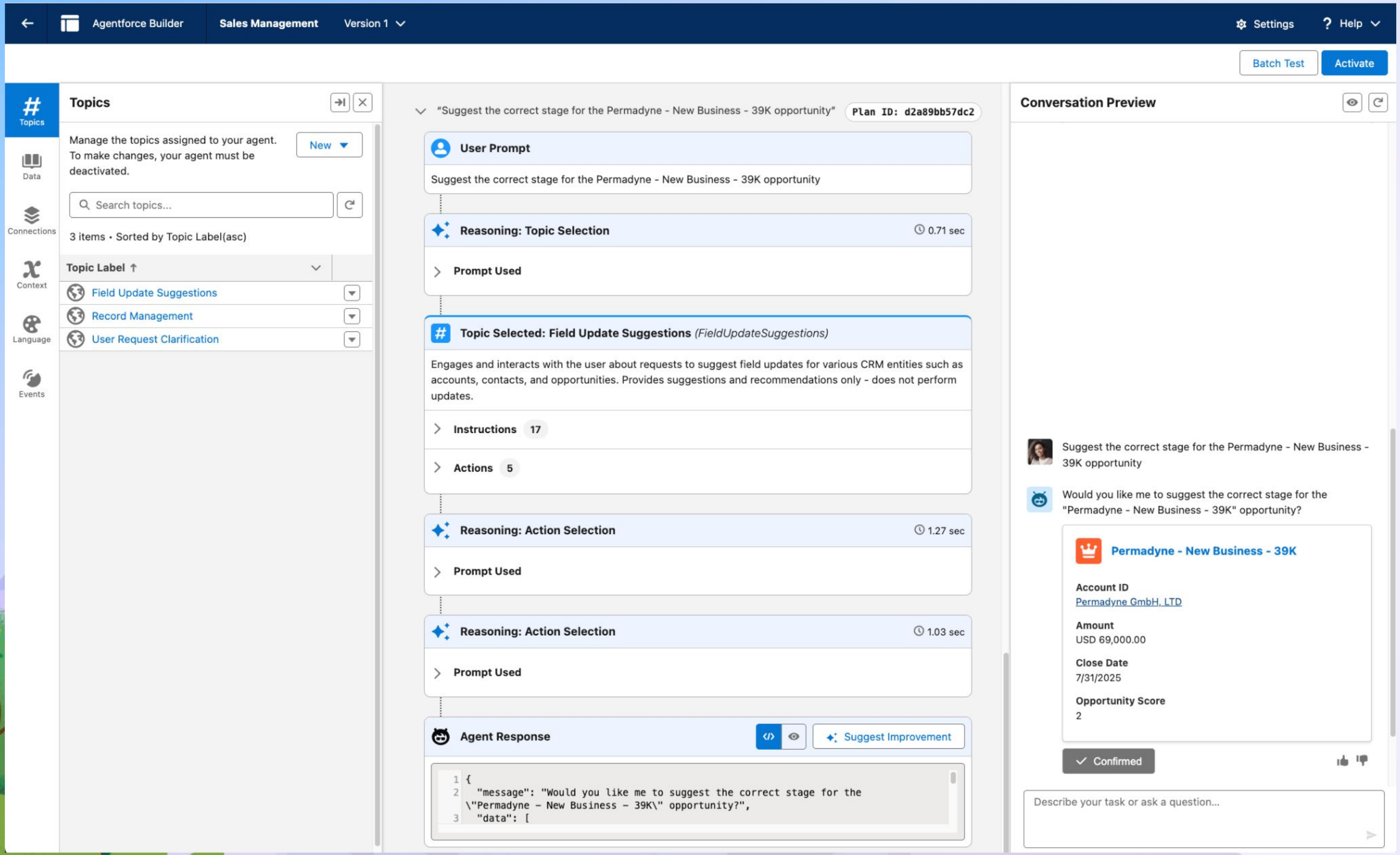

Test the Agent's Suggestions

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.

1 Enable Agentforce for Sales

2 Create and Configure

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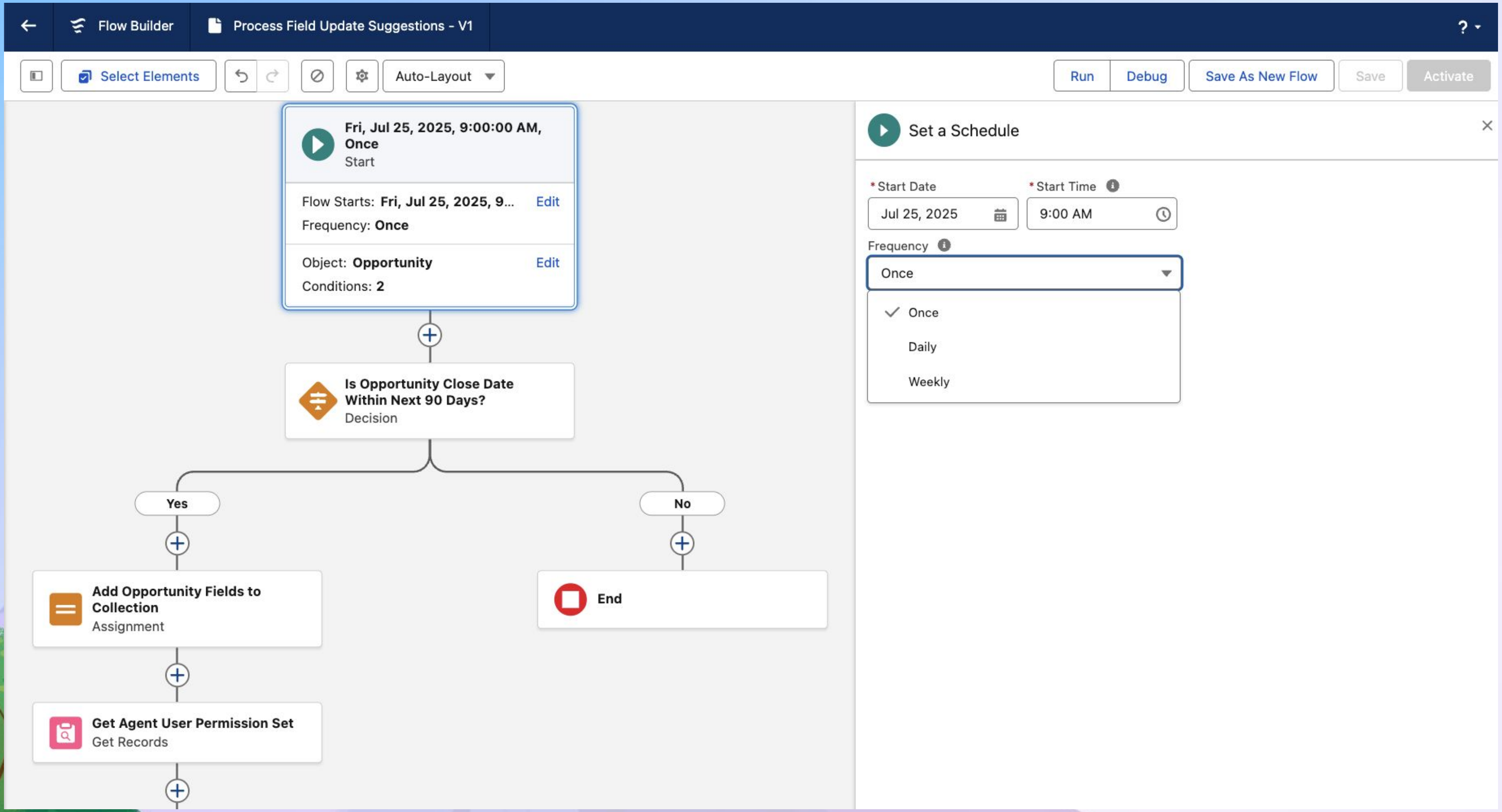

Run the Flow

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.

1 Enable Agentforce for Sales

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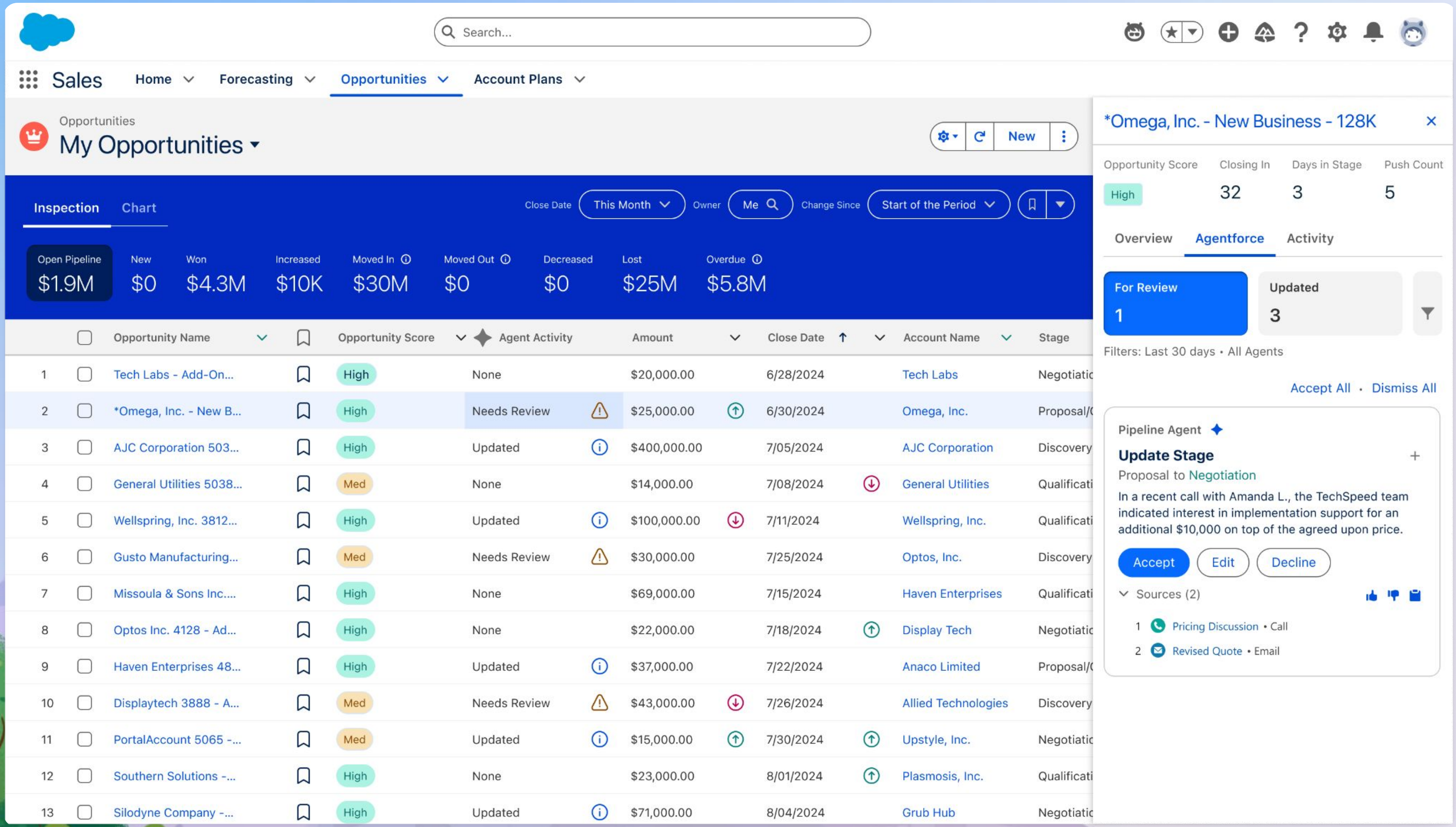
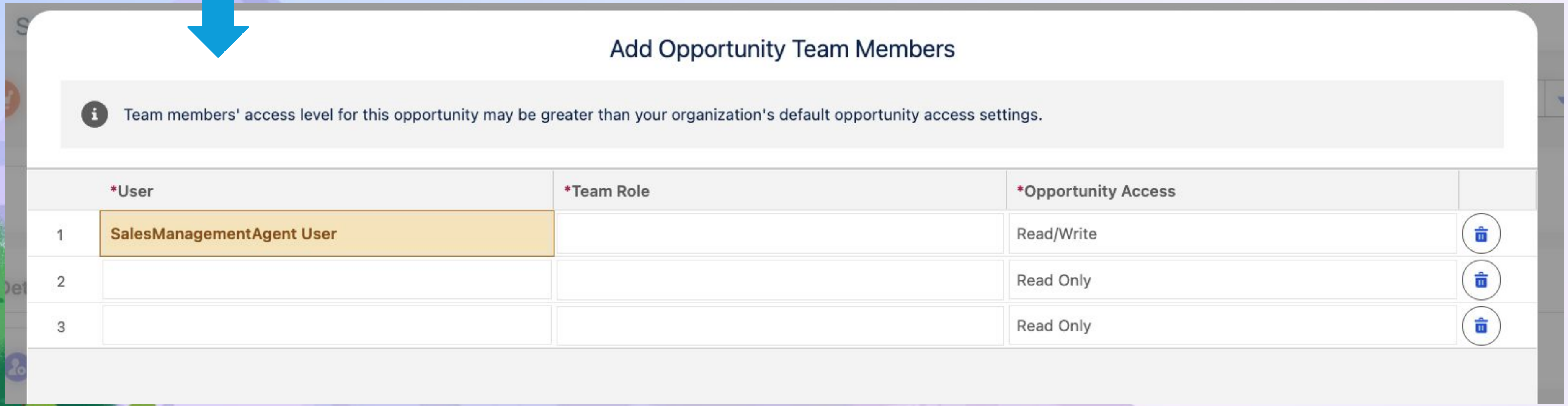


Review Agent Suggestions in Pipeline Inspection

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

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



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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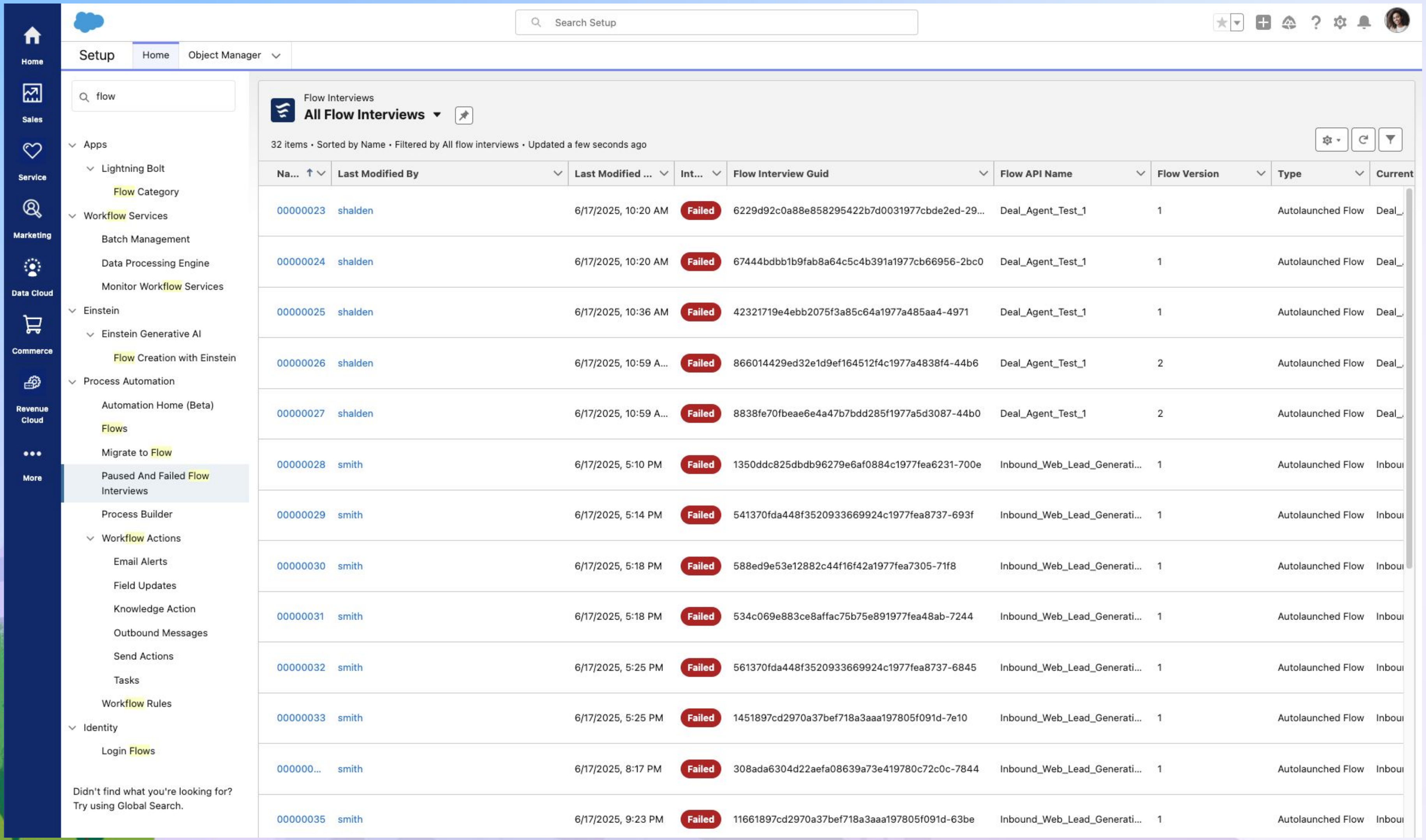
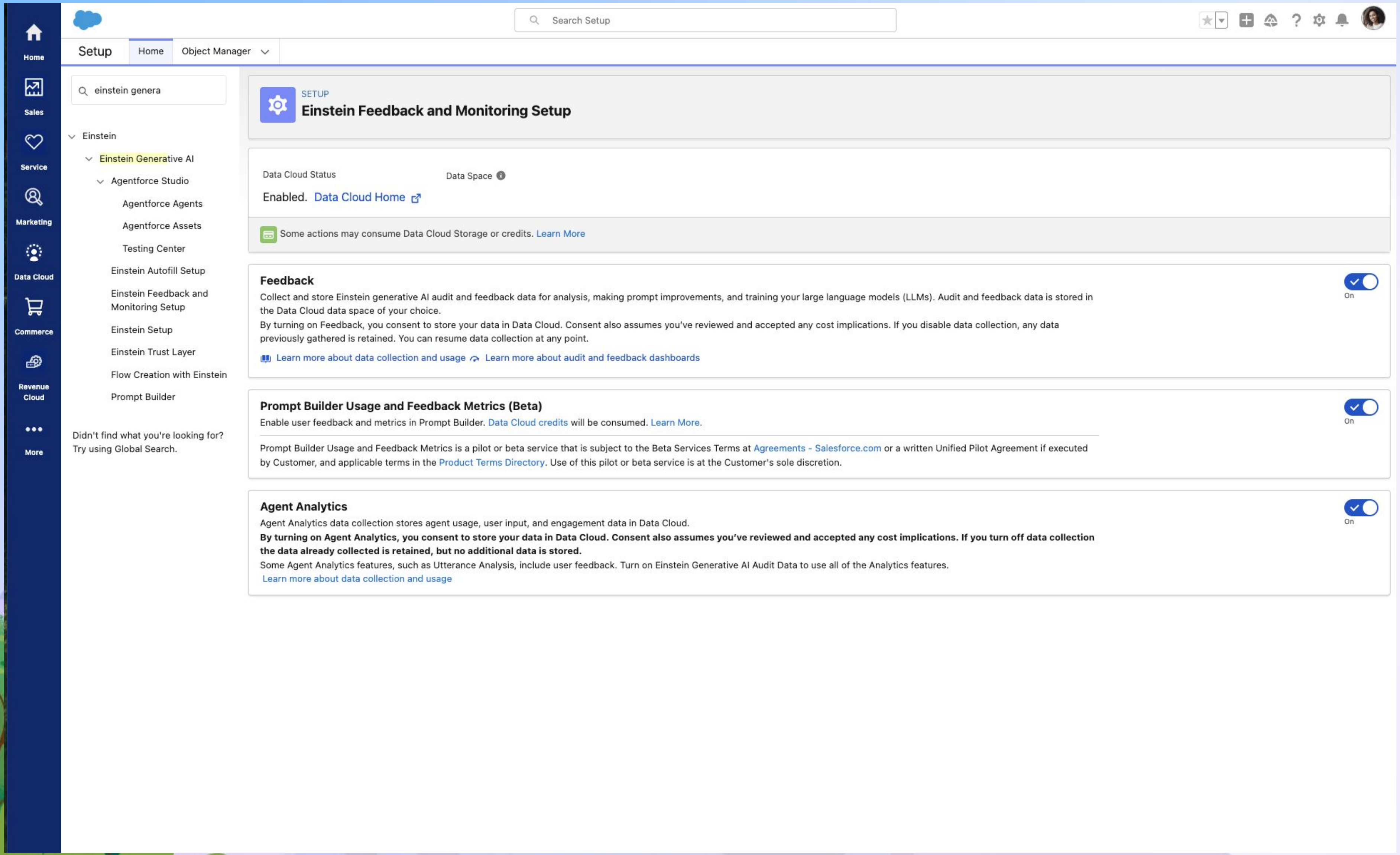


Monitor Flows

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

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



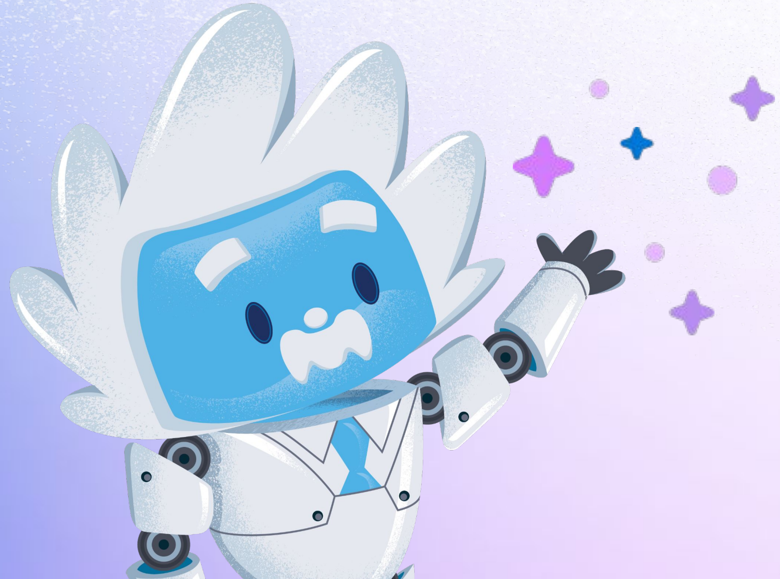
Enable Agent Analytics

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

Agentforce

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.	Reference the OOTB Flows and prompt templates to help you create custom scenarios. For instance, you can: 1. Modify the **Process Field Update Suggestions Flow** by adding fields to the **Add Opportunity Fields to Collection** node in the flow. 2. Create a prompt similar to **Recommend Next Step for Opportunity**, 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.

Prompts are configured in the Prompt Builder