Salesforce Headless 360: Partner Enablement Workshop

Welcome, Partners! This hands-on workshop is designed to equip you with the essential skills to master **Salesforce Headless 360**. Through this session, you will gain exclusive access to a dedicated Partner demo environment and the Headless 360 Playground—a powerful interface, similar to agents like Claude or Cursor, that connects directly to your Salesforce org via the Model Context Protocol (MCP).

By following the guided exercises below, you will learn to configure Salesforce-hosted MCP servers, build custom servers for specialized business logic, and leverage **Agentforce Vibes** to develop multi-framework applications. Let's begin your journey into headless innovation.

Requirements

- You must be a Salesforce Partner

Logistics

- 2 Hours of hands-on exercises
- If you have any questions please contact Scott Dunleavy via the #community-headless360 channel in Partnerblazer

Learning Objectives

- Equip Partners with MCP, Vibes, and Salesforce Multi-Framework skills

Pre-Work Table of Contents

0-1: Salesforce Demo Org Setup
1-1 Exercise 1: Configure Salesforce MCP Servers
1-2 Exercise 2: Explore Sales Cloud with Salesforce Hosted MCPs
1-3 Exercise 3: Create a Custom MCP Server
1-4 Exercise 4: Build with Agentforce Vibes
1-5 Exercise 5: Build a Mult-Framework App with React

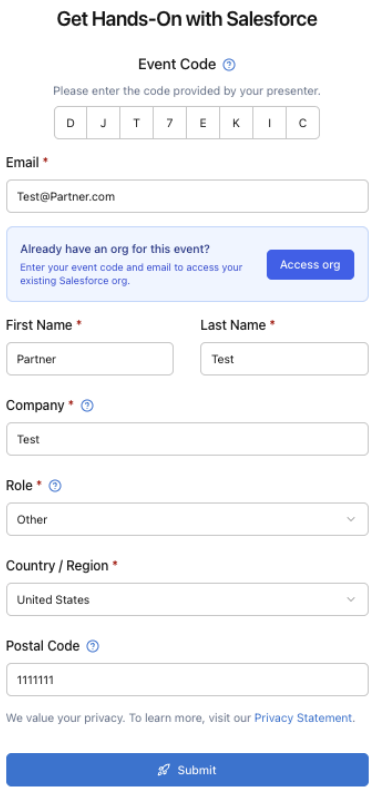
0-1: Activate your Salesforce Demo Org for the Workshop

1. To activate your Demo Org please head to the sign-up link.

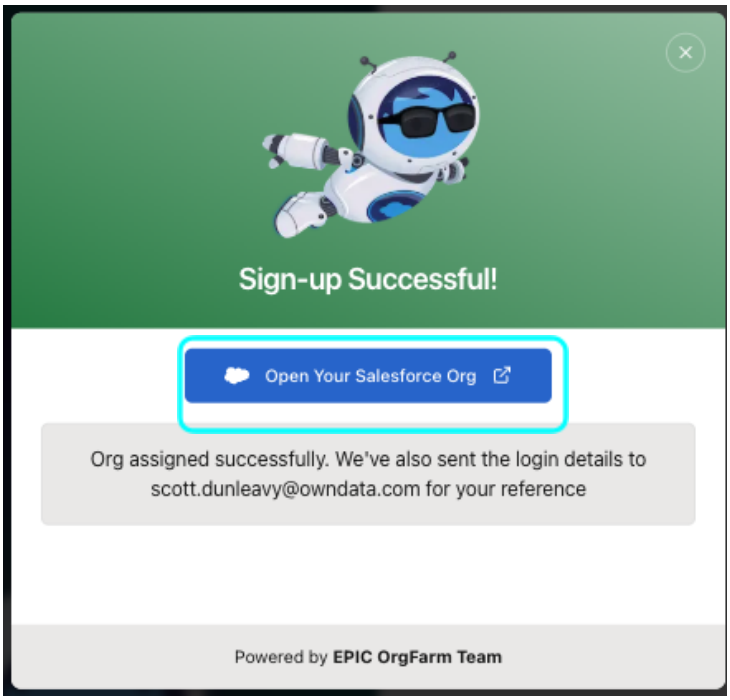
   Event Name: Partner Enablement: Headless 360 & Agentforce Vibes Self Guided Workshop
   Event Code: *DJT7EKIC*
   Sign-up Form: Sign-up form link

2. Enter the Event Code and your details into the form to activate your Demo Org which will be used specifically for the hands-on session. A unique username will be provided for your demo org, and you will reset your password in step 12.

   (**Event Code - *DJT7EKIC*** , ***Corporate Email Address***, First Name, Last Name, Company, Role, Country) and select Submit. See an example below.



3. Upon signing up you will be prompted to open your Salesforce demo org with a unique login link. You will also receive a login link via email. You can use either link to access your demo org. See an example email below.



Get Started: Your Org for Security & Privacy Implementation Expert Workshop (November) is Ready Inbox ×

Salesforce Developers <developer@salesforce.com>
to scott.dunleavy@owndata.com

Hello

Your Salesforce org is ready for the Security & Privacy Implementation Expert Workshop (November) event. Access it directly using the link below:

Login to Your Salesforce Org

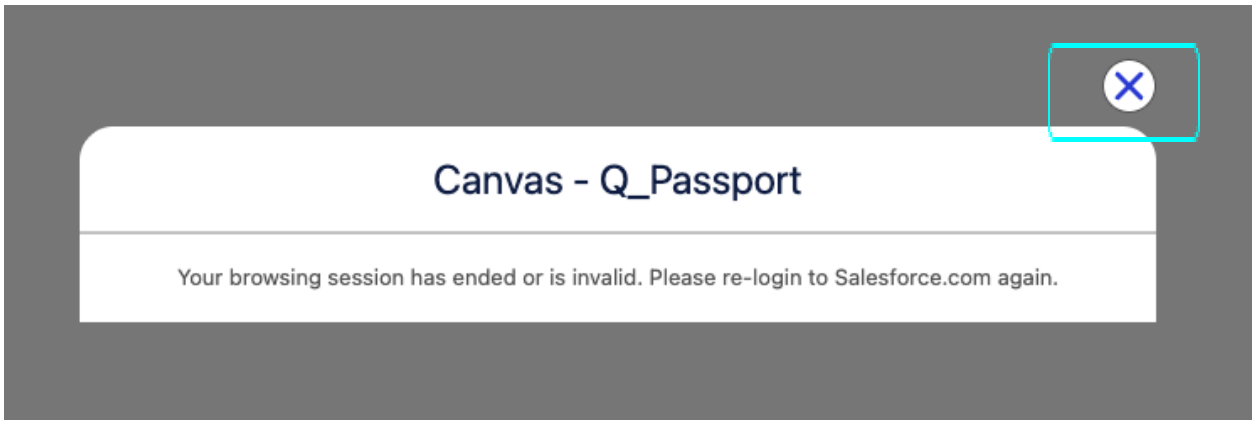
If the link expires, you can request a new one anytime from the Signup Page.

We look forward to your participation!

Thanks,
The OrgFarm Team

Reply Reply all Forward

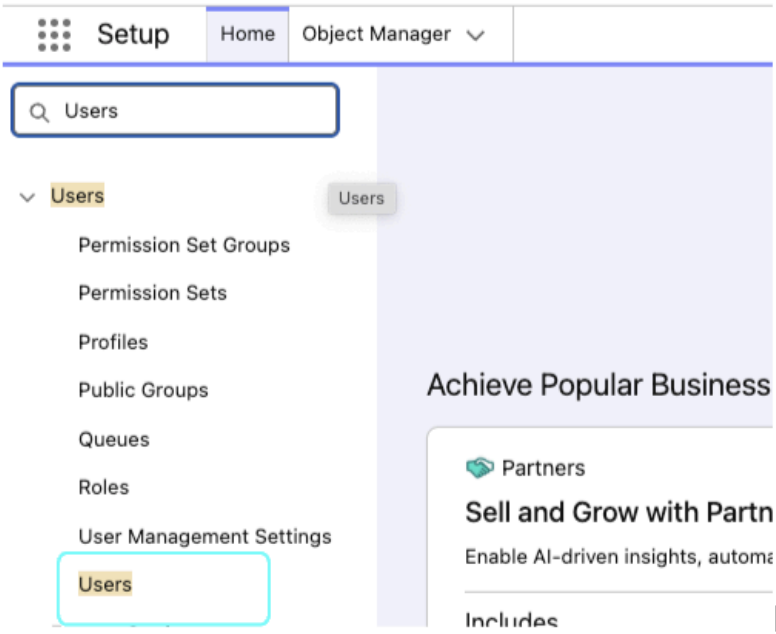
4. Upon accessing the org via the unique login link provided you may encounter the message below. **You can ignore this message, and simply 'X' out.** The demo org takes you to the Q Branch home page which is an internal Salesforce application that partners do not have access to. This message is normal to see.



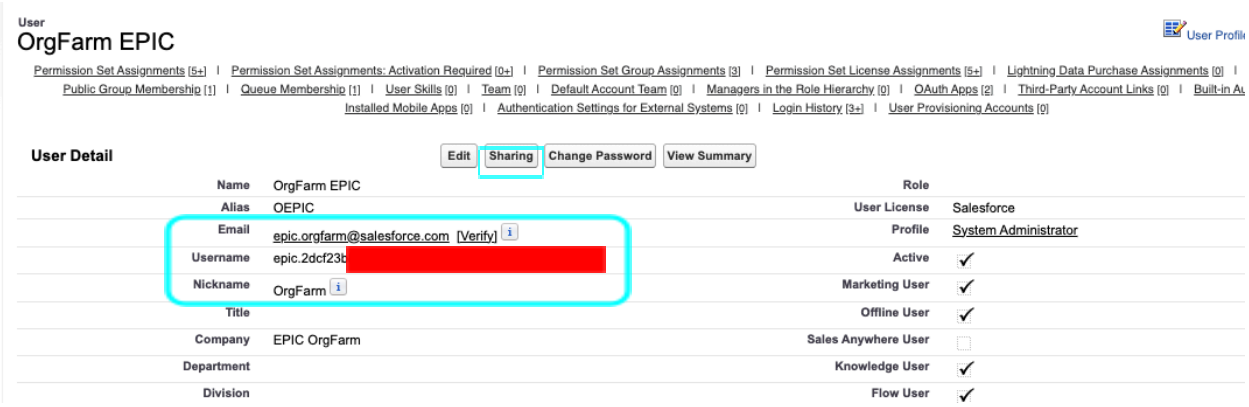
5. Once you close the pop-up above, navigate to setup using the gear icon in the upper right hand corner of the screen.



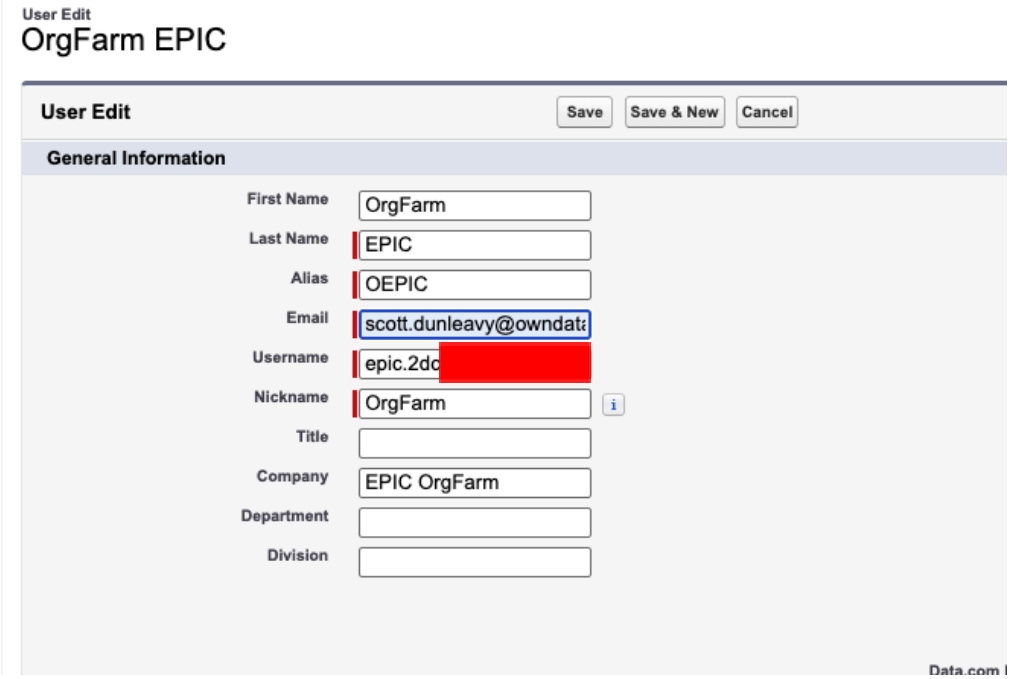
6. Within Setup in the Quick Find Box search for and select 'Users'.



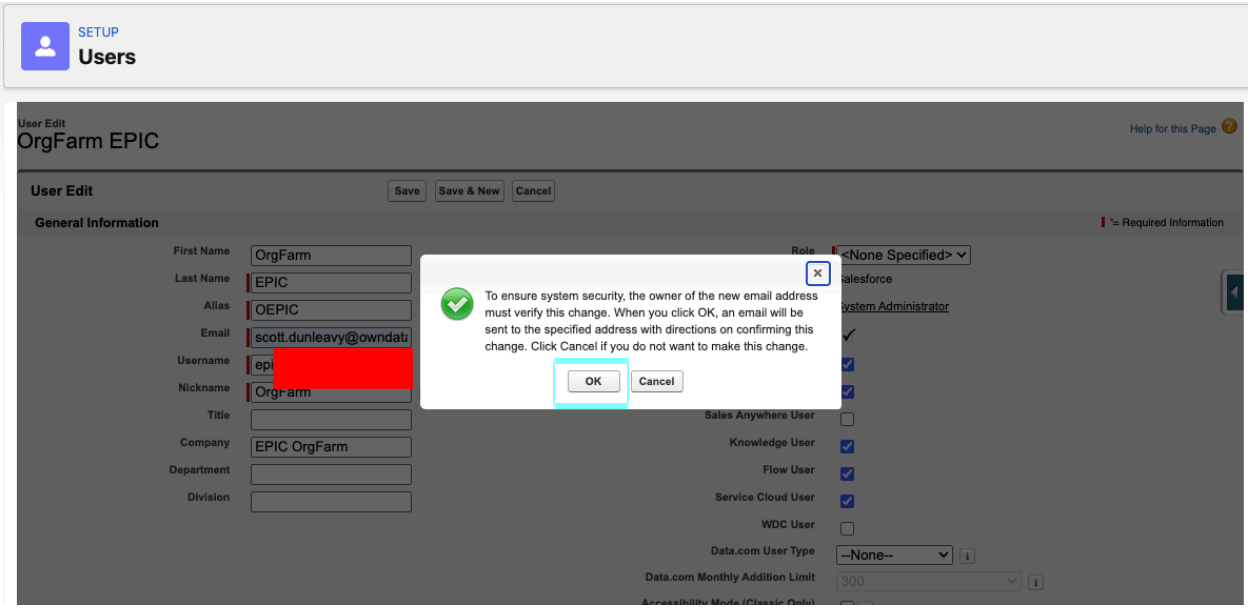
7. **This is an important step.** Within the Users setup page select your admin account (EPIC, OrgFarm). We are going to**:**
    a. Take note of the username created for you, as well as
    b. Change the email to the email address you used to sign up for the demo account. This will ensure that any notifications, and login verification codes are sent to your email.
8. Take note of the username provided for your user. Copy and paste this username to a notepad as you will need this later on. The password for your demo org is **orgfarm1234**



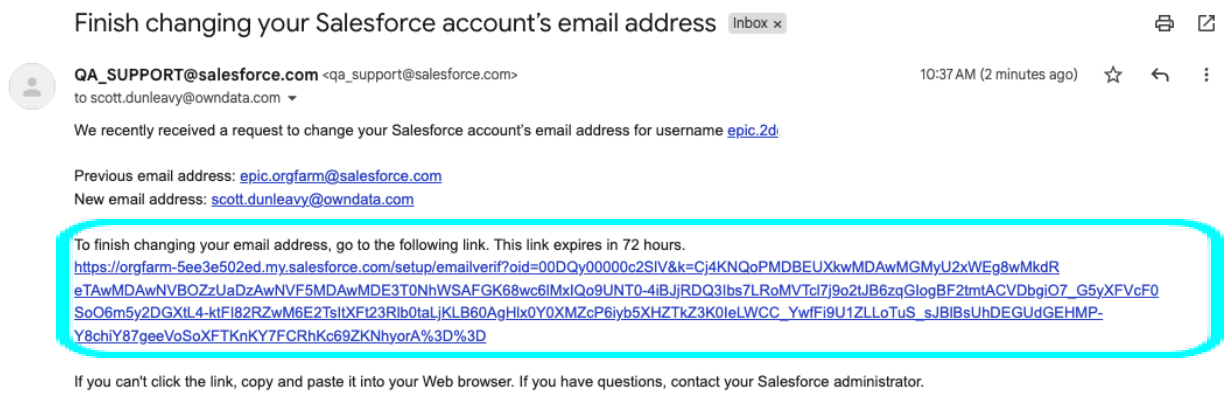
9. Within this screen, select Edit. We will now be changing the email address associated with the account. Currently the email address is a generic system email. Enter your email and select ‘Save’.

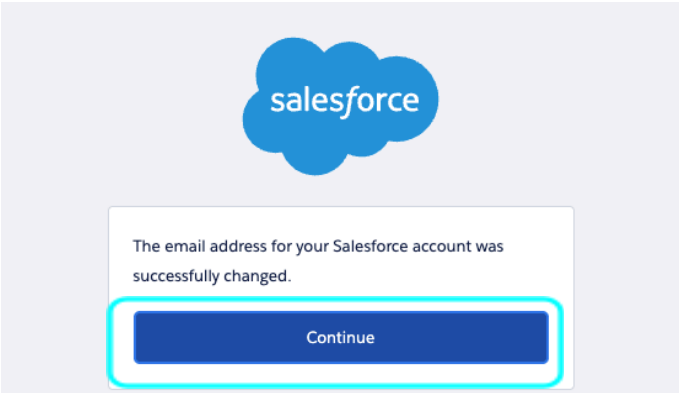


10. A pop-up window will appear. Select OK. This will trigger a verification email to your inbox.

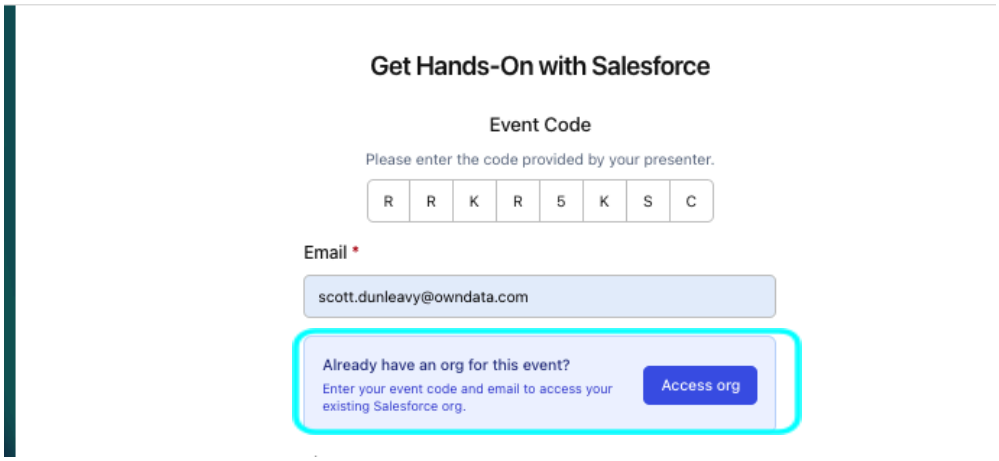


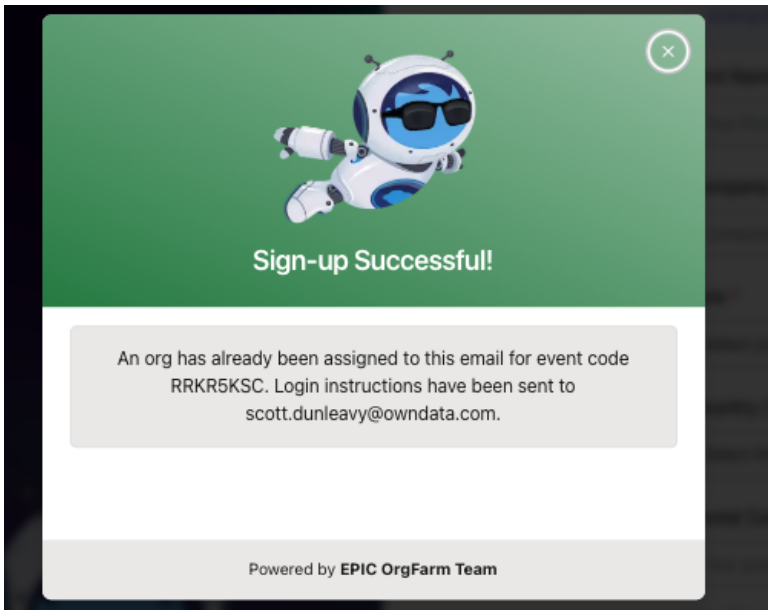
11. Below is an example of the verification email you will receive. Select the verification link, it expires in 72 hours. A pop-up window will appear, select Continue.

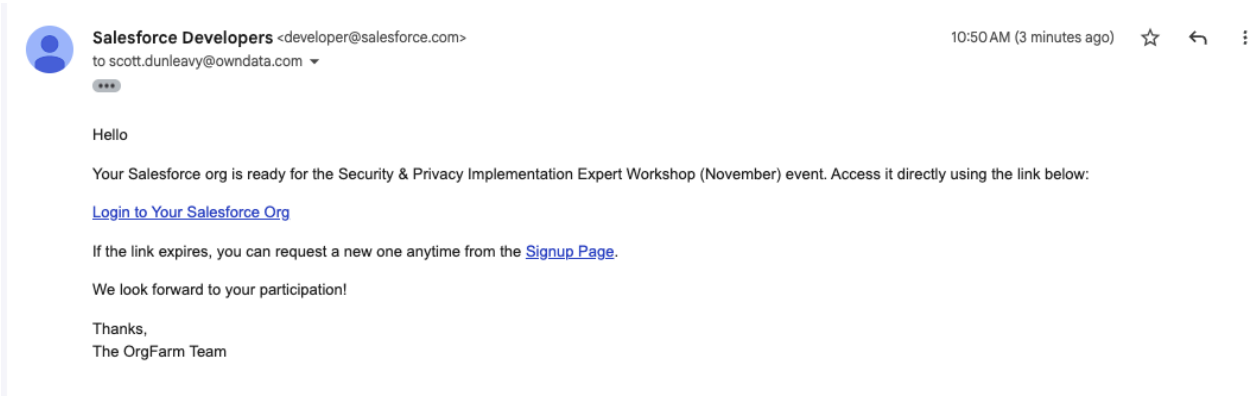




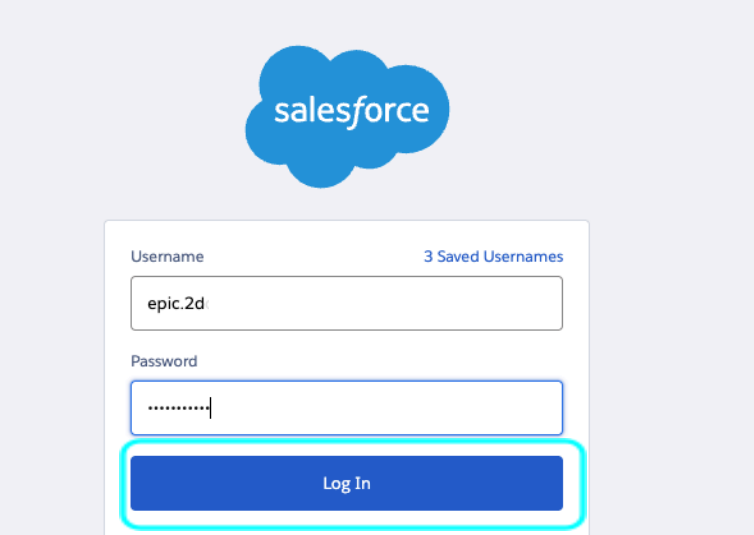
12. Awesome, you are almost there! Moving forward you can login with your username (see step #8) or you can head back to the sign-up link (see step #1) at any time and enter in the email address you used to sign-up for the demo account, and the event code (***DJT7EKIC*****).** From here you would select 'Access Org' next to 'Already have an org for this event?' and this will send a new login link to your inbox. See example below.



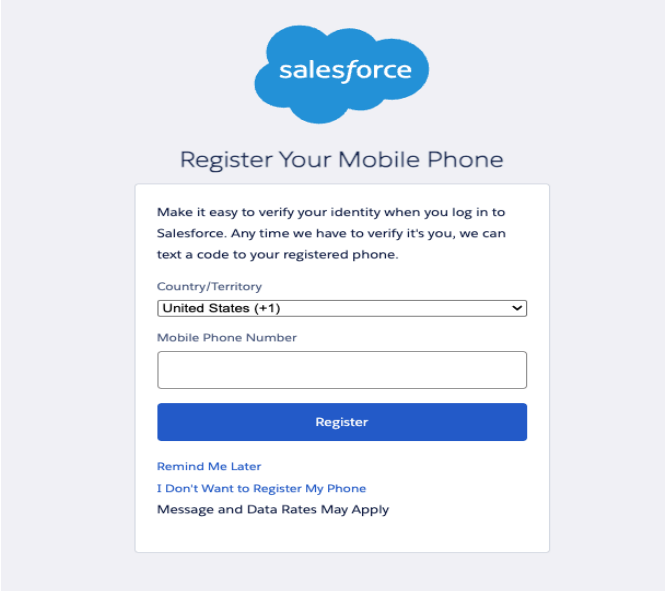




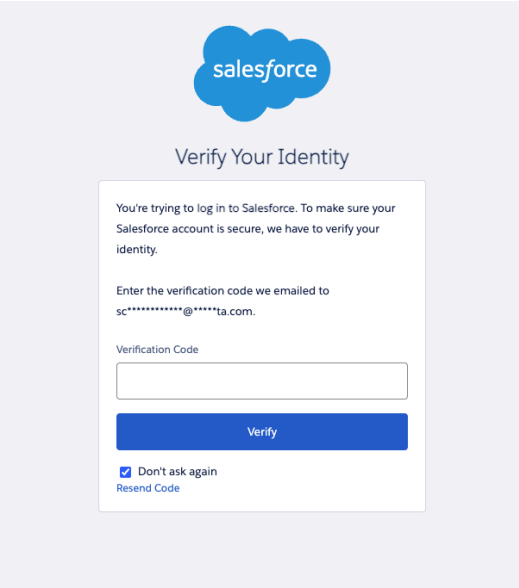
13. If you choose to login via username and password you can head to login.salesforce.com. From here you will enter your username (see step #8) and your password (**orgfarm1234**). Select Log In.

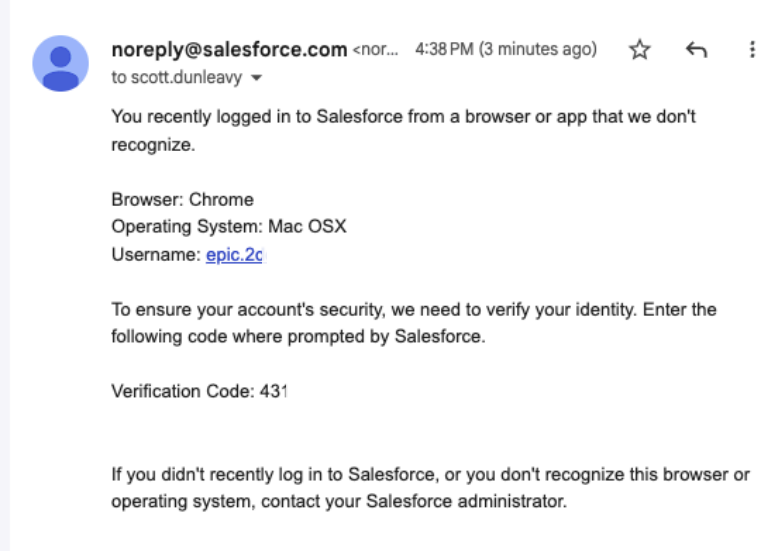


14. You will be prompted to register your mobile phone number. This will make it easier to verify your identity with a verification code moving forward. **I would recommend registering your mobile phone number, if you do you will receive verification codes via text.** If you select 'Remind Me Later' or 'I Don't Want to Register My Phone' you will be sent verification codes via the email address you assigned to the org (see step #9). *For purposes of this document I will select 'I Don't Want to Register My Phone' and will showcase the process flow for verification emails.*



15. Depending on your selection above, a verification code will now be sent to your phone number, or your registered email address. If you have issues please contact sdunleavy@salesforce.com who can assist.





16. **Once we have the verification code we can enter it and select ‘Verify’. You now have access to your demo org.**

1-1: Exercise 1 - Configure Salesforce MCP Servers

1. Now that your org is setup you can follow the steps here in **Exercise 1** of the Salesforce Developer Workshop. Note that we have already completed the set and verify your User's Email step, so you can proceed to **Step 2: Create an External Client App**.

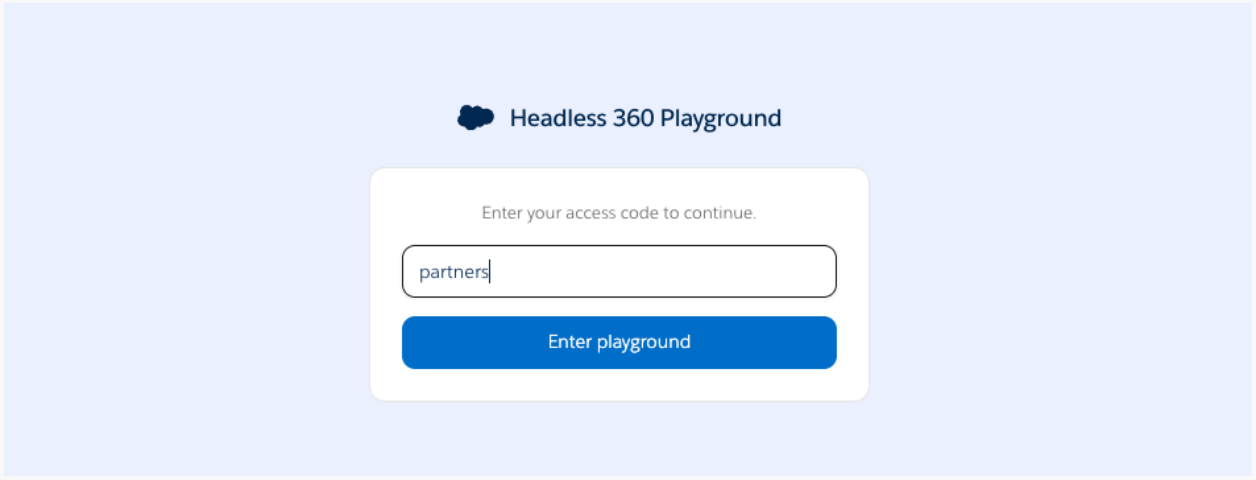
   In this section, you'll set up Salesforce Hosted MCPs (Model Context Protocol servers). These trusted, managed entry points let AI clients, agents, and developer tools interact with your Salesforce org through a standardized protocol.

   Salesforce Hosted MCPs provide a secure, governed, and fully managed way to expose Salesforce capabilities (data, metadata, Apex, Flow, and more) to MCP-aware clients without standing up your own infrastructure. Combined with the Salesforce Platform's trust, identity, and permissions model, they make it easy to build "headless" experiences and agents that operate against real Salesforce data on behalf of a user.

2. **Continue to follow the steps in Exercise 1 of the Salesforce Developer Workshop and continue on to Exercise 2 when complete.**

1-2: Exercise 2 - Explore Sales Cloud with Salesforce Hosted MCPs

1. The first step of Exercise 2 is to connect your Org to the Headless 360 Playground. When prompted to enter an event code please enter the code: ***partners***



In this exercise, you'll connect your org to the Headless 360 Playground and use Salesforce Hosted MCPs to investigate live Sales Cloud data across accounts, leads, opportunities, campaigns, and tasks. Once connected to the Playground, complete the exercise and proceed.

1-3: Exercise 3 - Create a Custom MCP Server

1. Follow the instructions in Exercise 3. In this exercise, you'll create your own Custom MCP Server to expose sales tools to end users. You'll work in Salesforce Setup to compose your server with custom Flows, custom Apex actions, and tools from the standard MCP servers. You'll then test your server and its tools in the Headless 360 Playground.
2. Once you complete all steps, continue to the Build with Agentforce Vibes Exercise.

1-4: Exercise 4 - Build with Agentforce Vibes

1. Complete Exercises 1, 2, and 3. Once completed continue on to the Build a Multi-Framework App with React Exercise.

1-5: Exercise 5 - Build a Multi-Framework App with React

1. Complete exercises 1, 2, 3, and 4.
2. **Congratulations, you have completed the hands-on self guided workshop!**