



AI Agents for Sales



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AI Agents for Sales

Learn how Agentforce augments a sales team's productivity and efficiency.

-  **Note** Sales Cloud is now Agentforce Sales. You may see references to Sales Cloud in our application and documentation.

Sales Agents Roles and Responsibilities

Identify the roles and responsibilities for enabling, managing, and using sales agent and what permissions are required to perform those responsibilities.

Agentforce Lead Generation

Engage with prospects via a website or messaging channel to answer questions, capture leads, and schedule meetings with your sales team. When you enable Inbound Lead Generation, your customers get 24/7 access to an Agentforce agent, helping you to streamline the lead intake process and reduce manual data entry.

Agentforce Qualification

Instantly qualify leads and strengthen your sales pipeline using the Agentforce for Sales guided configuration. This upgrade empowers your reps to rapidly determine prospect fit early in the process, preventing wasted time and resources. By focusing on high-potential deals, your team will boost overall efficiency and conversion rates.

Agentforce Lead Nurturing

Scale your sales team, accelerate growth, and maximize your pipeline by nurturing prospects 24/7 with an AI-powered sales agent to nurture your prospects. Agentforce Lead Nurturing works new or updated leads, contacts, and person accounts automatically, sending customized intro emails to each prospect, responding to replies, and connecting qualified leads with sales reps.

Agentforce Sales Management

Support sales teams through every step of the sales process with the help of generative AI. Automate time-consuming tasks such as record updates, get timely and data-informed suggestions, and more with the help of a Sales Management agent.

Agentforce Sales Coach

Empower your team to engage with customers more effectively using Agentforce Sales Coach, a personal AI coach integrated into Sales Cloud. Agentforce Sales Coach provides personalized coaching and feedback in real time to improve user interactions. It analyzes communication within Salesforce object records to give clear, actionable insights, and prepares reps for challenging conversations through interactive role-playing.

Agentforce (Default) for Sales Setup

Agentforce (Default) topics and actions related to sales are designed to help sellers effectively manage deals, handle deal closures, explore conversations, stay on top of customer communication, and forecast sales revenue. Each action is mapped to one or more topics.

See Also

[Agentforce \(Default\) for Sales Setup](#)

Sales Agents Roles and Responsibilities

Identify the roles and responsibilities for enabling, managing, and using sales agent and what permissions are required to perform those responsibilities.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce Sales Coach add on.

Sales Agents

This role is designated for the autonomous agents in your organization: Agentforce SDR and Agentforce Sales Coach. Each agent requires a new user. Assign the respective permission set for each agent. Assign this permission set only to the user representing your autonomous agent. Assign only one of these permission sets per user.

Responsibilities include operating and generating AI outputs of what is included in the topics, actions, and prompt templates tied to each agent.

Assign these permissions to the agent user.

Agent Type	Permission Set
SDR Agent	Agentforce SDR Agent
Agentforce Sales Coach	Agentforce Sales Coach

Agent Managers

This role is responsible for managing sales agents within your company and teams. Users with agent manager permissions have access to assign sales agent to users, modify Agent topics and actions, and customize prompt template instructions.

Assign these permissions for a user to manage and configure your agent.

Agent Type	Permission Set
SDR Agent	Configure Agentforce SDR Agent
Agentforce Sales Coach	Manage Agentforce Sales Coach

Agent Users

This role represents the users leveraging a sales agent to support them in their role. For Sales Cloud and Sales Agents, users are usually sales reps.

Assign these permissions to grant sales reps access to your agent.

Agent Type	Permission Set
SDR Agent	Use Agentforce SDR Agent
Agentforce Sales Coach	Use Agentforce Coach Agent

Agentforce Lead Generation

Engage with prospects via a website or messaging channel to answer questions, capture leads, and schedule meetings with your sales team. When you enable Inbound Lead Generation, your customers get 24/7 access to an Agentforce agent, helping you to streamline the lead intake process and reduce manual data entry.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** Editions.

Set Up Inbound Lead Generation

Engage with prospects via a website or messaging channel to answer questions, capture leads, and schedule meetings with your sales team.

Considerations for Setting Up Inbound Lead Generation

Keep these considerations in mind when configuring Inbound Lead Generation.

Lead Generation for Agentforce Service Agent

Expand your Agentforce Service Agent's scope to autonomously increase your team's lead pipeline by capturing leads from your website or messaging channel. With the lead generation topics and actions, customers gain access to an agent on your website that answers questions, captures the necessary data to generate leads, and quickly schedules a meeting with a sales rep.

Set Up Inbound Lead Generation

Engage with prospects via a website or messaging channel to answer questions, capture leads, and schedule meetings with your sales team.

Turn On Inbound Lead Generation

Agentforce Inbound Lead Generation engages with prospects on your website or messaging channel to answer questions, capture leads, and schedule meetings with your sales team.

Manage Access for Managers and Users

To configure and use Inbound Lead Generation, users and admins need specific permissions.

Manage the Inbound Lead Generation Agent's User Record

An Inbound Lead Generation agent requires a user record to operate in your organization. Create a user for your agent or assign an existing user to it.

Assign and Verify Users to Schedule Meetings

Inbound Lead Generation enables prospects to schedule meetings with sales reps who have the appropriate permissions.

Configure Data for Your Inbound Lead Generation Agent

To manage the data that your agent uses, select an existing data library or create one.

Build and Manage Your Inbound Lead Generation Agent

The Inbound Lead Generation template guides you through creating an agent to autonomously engage with and capture prospects in Salesforce.

Connect Your Inbound Lead Generation Agent to a Messaging Channel

Connect your Inbound Lead Generation agent to a messaging channel that you want it to engage with.

Turn On Inbound Lead Generation

Agentforce Inbound Lead Generation engages with prospects on your website or messaging channel to answer questions, capture leads, and schedule meetings with your sales team.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS NEEDED

To set up Inbound Lead Generation:

Configure Inbound Lead Generation Agent

1. From Salesforce Go, on the Agentforce for Sales tile, click **Set Up or Keep Going**.
2. If you haven't already, turn on Agentforce.
3. Expand the Inbound Lead Generation section.
4. Turn on Inbound Lead Generation.

Agentforce automatically turns on these supporting features.

- Email Productivity
- Digital Experiences
- Omni-Channel

Agentforce also creates a default routing configuration and a default queue and assigns routing configuration. It also assigns you the Configure Inbound Lead Generation permission.

Now that Inbound Lead Generation is on, assign permissions for your users.

Manage Access for Managers and Users

To configure and use Inbound Lead Generation, users and admins need specific permissions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS NEEDED

To set up Inbound Lead Generation: Configure Inbound Lead Generation Agent

1. On Salesforce Go, from the Agentforce for Sales setup page, go to the Inbound Lead Generation section.
2. In the Manage Access for Managers and Users step, click **Manage**.
3. By default, Agentforce assigns you the Configure Inbound Lead Generation permission. To assign this permission to other users, click the **Configure Inbound Lead Generation Agent** tab. Then select the users to assign the permission to and click **Assign**.
4. To allow users to set up Data 360 for your agent, click the **Data Cloud Admin** tab and assign the permission to users.
5. When you're finished, click **Done**.

Manage the Inbound Lead Generation Agent's User Record

An Inbound Lead Generation agent requires a user record to operate in your organization. Create a user for your agent or assign an existing user to it.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS NEEDED

To set up Inbound Lead Generation: Configure Inbound Lead Generation Agent

1. On Salesforce Go, from the Agentforce for Sales setup page, go to the Inbound Lead Generation section.
2. In the Manage Agent's user record step, click **Manage**.
3. From the dropdown, select an existing user or click **+ New User**.
 - If you selected an existing user, click **Verify**.

- If you're creating a user, enter a first and last name, and click **Create**.
4. Click **Close**.

Assign and Verify Users to Schedule Meetings

Inbound Lead Generation enables prospects to schedule meetings with sales reps who have the appropriate permissions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To set up Inbound Lead Generation:	Configure Inbound Lead Generation Agent
To be assigned to a sales meeting:	Sales Engagement User, Sales Engagement Cadence Creator, Sales Engagement Quick Cadence Creator, Sales Cloud Einstein, Sales Engagement Basic User

1. On Salesforce Go, from the Agentforce for Sales setup page, go to the Inbound Lead Generation section.
2. In the Assign and Verify Users for Meeting Scheduling step, click **Manage**.
3. In each tab, select the users that you want to assign the permission set to, and click **Assign**. Each permission set listed is required for Meeting Scheduling.
4. When you're finished, click **Done**.

Configure Data for Your Inbound Lead Generation Agent

To manage the data that your agent uses, select an existing data library or create one.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To set up Inbound Lead Generation:	Configure Inbound Lead Generation Agent
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1. In Salesforce Go, from the Agentforce for Sales setup page, go to the Inbound Lead Generation section.

2. In the Configure Data for Your Agent section, click **Go to Setup**.
3. If you haven't already, turn on Data Cloud.
4. In Data Library Setup, select an existing data library or create one.
5. Upload text, HTML, or PDF files containing information that your agent can use to generate replies, such as product descriptions, price sheets, and white papers. You can upload up to 4 MB for text or HTML files, or 100 MB for PDF files.

Build and Manage Your Inbound Lead Generation Agent

The Inbound Lead Generation template guides you through creating an agent to autonomously engage with and capture prospects in Salesforce.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To set up Inbound Lead Generation: Configure Inbound Lead Generation Agent

Create Your Agent

1. In Salesforce Go, from the Agentforce for Sales setup page, go to the Inbound Lead Generation section.
2. In the Build and Manage Agents step, click **Go**.
3. Click **Let's Get Started**.
4. Select **Inbound Lead Generation** as the agent template type.
5. Click **Continue**.
6. On the Getting Started page, select the user record you specified earlier for your agent.
7. Fill in an internal name for your agent and your company's name.
8. Select the language that you want your agent to use when engaging with prospects.
9. Enter a description of your company. The agent uses this description to help answer questions and customize the responses for your business.
10. Click **Save and Continue**.

Define Conversation Settings for Your Agent

Inbound Lead Generation engages with prospects on websites and in-app messaging channels. Configure the conversation settings to instruct your agent on how to converse with prospects.

1. Go to the Conversation Settings page of Sales Agent Configuration for your Inbound Lead Generation agent.
2. Enter a primary value proposition for your company. For example, highlight the main benefits of your

offerings, describe what makes you unique, and what problems you solve.

3. Enter three to five of your company's key achievements.
4. Review your agent's AI disclosure and update it as needed. The AI disclosure is the first message that your agent sends when engaging with a prospect.
5. Select the message tone for your agent to use.
6. Click **Save and Preview**.
7. Test your agent in the Preview Conversation panel.
8. Click **Continue**.

Give Your Agent Product Knowledge

Give your agent access to an existing data library or create one. The data library contains information that your agent can use to generate replies, such as product descriptions, price sheets, and white papers.

1. Go to the Product Knowledge page of Sales Agent Configuration for your Inbound Lead Generation agent.
2. Select an existing data library or create one.
3. (Optional) Add Web Source Data to your agent.
4. Test your agent's knowledge in the Preview Conversation panel.
5. When you're finished, click **Save**, and then click **Continue**.

Capture Prospect Information

Manage how your Inbound Lead Generation agent captures prospects' data.

1. Go to the Capture Prospect Information page of Sales Agent Configuration for your Inbound Lead Generation agent.
2. Select the type of object that you want your agent to create.
3. If you selected Lead, enter a default value for Status. All new leads are set to this status.
4. If you selected Contact or Person Account, select a default value for Owner ID and the fields that you don't want your agent to collect. All records will be assigned to the user that you select. The user must have Inbox enabled.
5. (Optional) Turn on email One-Time Password Authentication.
6. Select an agent or user that has Inbox enabled as the fallback owner for scheduled meetings.
7. (Optional) Allow your agent to hand off to a Lead Nurturing agent.
 - a. Turn on Handoff, and select an active Lead Nurturing agent.
 - b. Select the number of hours or days to wait before handing off to the Lead Nurturing agent.
8. Click **Save**, and then click **Continue**.

Turn On Qualification (Optional)

Configure your agent to automatically qualify prospects before scheduling a meeting.

 **Note** After you turn on Qualification for an agent, you can't turn it off. If you want an agent to stop

qualifying prospects, deactivate the agent and build a new one.

1. Go to the Qualification Settings page of Sales Agent Configuration for your Inbound Lead Generation agent.
2. Click **Turn on Qualification**.
3. Click **Continue**.
4. In the Data Collection section, enter and then click the field names you want the agent to collect, one at a time.
5. In the Set Qualification Guidance section, enter a description of your ideal customer profile.
6. Enter the qualifying questions that your sales reps ask to determine a prospect's interests, needs, and urgency.
7. Click **Continue**.

Review and Activate Your Agent

Before activating your agent, make sure that it's operating as expected.

1. Go to the Review and Activate page of Sales Agent Configuration for your Inbound Lead Generation agent.
2. Review each field. To make changes, click **Back**.
3. Test your agent in the Preview Conversation panel.
4. When you're satisfied, click **Activate Agent**.

Connect Your Inbound Lead Generation Agent to a Messaging Channel

Connect your Inbound Lead Generation agent to a messaging channel that you want it to engage with.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To set up Inbound Lead Generation:

Configure Inbound Lead Generation Agent

1. In Salesforce Go, from the Agentforce for Sales setup page, go to the Inbound Lead Generation section.
2. In the Connect Your Agent to a Messaging Channel section, click **Connect Channel**.
3. Click **Start**.
4. Select the type of channel that you want to connect the agent to and follow the instructions.
5. On the channel routing step, select **Agentforce Service Agent** as the routing type.
6. For Agentforce Service Agent, add your Inbound Lead Generation agent.
7. Enter a fallback queue.

8. Click **Save**.

Considerations for Setting Up Inbound Lead Generation

Keep these considerations in mind when configuring Inbound Lead Generation.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, and Unlimited** Editions.

Required Fields for Record Creation

In the Capture Prospect Information step for Inbound Lead Generation, all fields under “Ask Agent to Collect” must be required and can’t be dependent picklist fields. The required fields can be UDD fields that are required for all Salesforce users or layout fields that are specific to the assigned page layout. If you have a required dependent picklist field, remove the requirement in Object Manager. If you have a required field with multi-picklists, Inbound Lead Generation can select only one value.

If the prospect object selected has a required lookup field, and the lookup is on an object that the agent user’s profile doesn’t have access to, the field isn’t shown in the Ask Agent to Collect section because the agent user can’t access that field. This scenario can cause record creation to fail because the agent can’t set a value for the required lookup field. To solve this issue, consider these workarounds.

- If the prospect object selected has a UDD required field and the agent doesn’t have CRUD access to the lookup object, remove the requirement from the field.
- If the object layout assigned to the agent user has a layout-required lookup field and the agent doesn’t have access to the lookup object, remove the field’s required status or remove the field.

Agent Customization

Your Inbound Lead Generation agent can be customized in Agent Builder and Sales Agent Customization. If changes are made to the agent in Agent Builder, the agent is no longer synced with the guided setup and any future changes to the agent must be made in Agent Builder.

Data Libraries

If you add a data library during guided setup, it isn’t visible in the guided setup for up to 24 hours because Data 360 updates the cache only every 24 hours. Setting up a data library is optional, but the chat panel in Conversation Settings performs better with a data library.

Messaging for In-App and Web (MIAW) Connection

After you create a channel, MIAW can take a few minutes to send you to the embedded service

deployment. Instead of waiting, you can go to the Embedded Services Deployment setup page and confirm that the channel is connected to the agent. When it's connected, add the agent to your custom website.

Meeting Scheduling and Ownership

The agent can schedule meetings and assign meeting ownership only to users who have set up Inbox and have an email address in the Connected Account section in their personal settings. If a user isn't shown as an option during setup, it's because they don't meet these requirements.

Lead Handoff Between Sales Agents

Leads created by the Inbound Lead Generation agent can be handed off to a Lead Nurturing agent when the prospect doesn't schedule a meeting with a sales rep.

Currently only lead objects can be handed off between agents. Contacts and Person Account records aren't supported.

When a lead assignment rule is set to assign queues to lead owners, the Inbound Lead Generation agent is unable to handoff to a Lead Nurturing agent.

If an org reaches 200 pending handoffs, lead handoff is paused until the pending handoffs are successfully assigned to a Lead Nurture agent. An email is sent to the agent manager notifying them of each lead handoff that fails.

Lead Qualification

The Inbound Lead Generation agent has an optional feature to qualify prospects during a web chat session. To enable lead qualification for an agent, One-Time Password (OTP) authentication must also be turned on. When lead qualification is enabled for an agent, it can't be turned off. To stop qualifying leads, create an agent and keep the lead qualification feature turned off.

Lead Generation for Agentforce Service Agent

Expand your Agentforce Service Agent's scope to autonomously increase your team's lead pipeline by capturing leads from your website or messaging channel. With the lead generation topics and actions, customers gain access to an agent on your website that answers questions, captures the necessary data to generate leads, and quickly schedules a meeting with a sales rep.

REQUIRED EDITIONS

[View supported editions.](#)

Lead Generation for Agentforce Service Agent includes these topics, actions, and flows.

Topics:

- Sales Record Creation—Instructs the agent to generate Salesforce records. By default, it creates lead records, but you can configure the topic to create contacts and person accounts instead.
- Prospect Meeting Scheduling—Instructs the agent to send a calendar meeting link to the prospect.

Actions: Get Record Fields, [Create a Sales Lead Record](#), [Create a Sales Contact Record](#), [Create a Sales Person Account Record](#), and [Return Calendar Link](#).

Flows: Create a Sales Lead Record, Create a Sales Contact Record, and Create a Sales Person Account Record.

[Set Up Agentforce Service Agent for Lead Generation](#)

Expand your Agentforce Service Agent's scope to autonomously capture leads from your website or messaging channel. The lead generation topics and actions capture the necessary data to generate leads and schedule a meeting with a sales rep.

[Configure the Sales Record Creation Topic to Generate Sales Contacts or Person Accounts](#)

By default, the Sales Record Creation topic includes the Create Sales Leads action. You can change the topic to generate contacts or person accounts instead.

[Considerations for Agentforce Service Agent Lead Generation](#)

When enabling your Agentforce Service Agent to generate leads, keep these considerations in mind.

Set Up Agentforce Service Agent for Lead Generation

Expand your Agentforce Service Agent's scope to autonomously capture leads from your website or messaging channel. The lead generation topics and actions capture the necessary data to generate leads and schedule a meeting with a sales rep.

REQUIRED EDITIONS

[View supported editions.](#)

1. If you don't have an Agentforce Service Agent, [set up an agent](#).
2. [Turn on Sales Inbox](#).
3. [Add the Sales Record Creation topic and Prospect Meeting Scheduling to your service agent](#).
4. Give your service agent CRUD access to leads, contacts, and person accounts.
 - a. Go to Profiles Setup and click **New Profile**.
 - b. Select the profile assigned to your service agent.
 - c. Enter a profile name, and click **Save**.
 - d. Under Standard Object Permissions, add CRUD access for Lead, Contact, and Person Account.
 - e. Go to User Setup and change the agent's user profile to the new profile.
5. Assign the **Inbox Scheduling Proxy User** permission to the agent.
This user permission isn't visible in setup. Clone an existing permission set or create one and manually add it.
6. (Optional) [Modify the agent to create contacts or person accounts instead of leads](#).

Configure the Sales Record Creation Topic to Generate Sales Contacts or Person Accounts

By default, the Sales Record Creation topic includes the Create Sales Leads action. You can change the topic to generate contacts or person accounts instead.

REQUIRED EDITIONS

[View supported editions.](#)

1. On the Agentforce Agents setup page, open the agent that you want to use for contact or person account creation in Agent Builder.
2. If the agent is active, deactivate it.
3. On the Topics tab, select **Sales Record Creation**.
4. In Topic Configuration, click **New Version**.
5. Click **New**, and select **Create Sales Contact** or **Create Sales Person Account** action.
6. Remove the Create Sales Lead action.
7. Save your changes. These changes apply only to this agent.

Considerations for Agentforce Service Agent Lead Generation

When enabling your Agentforce Service Agent to generate leads, keep these considerations in mind.

REQUIRED EDITIONS

[View supported editions.](#)

General

- To answer sales-specific questions separately from service questions, create another topic for sales FAQ.
- Topic instructions influence an agent's efficacy. Because the default instructions are based on internal testing, you might need to customize the instructions to meet your use case.
- Conversation captured in a messaging session between an agent and prospect isn't stored in the lead, contact, or person account record that's created.

Lead Ownership

When the agent creates a lead, the owner is determined based on the default lead owner set in Lead Settings or your lead assignment rules. If your lead assignment rule fails, the lead is assigned to the default owner.

Contact and Person Account Ownership

Lead assignment rules don't apply to contacts and person accounts. The agent is the default owner for all contacts and person accounts that it creates. If you want to assign ownership to a sales rep or manager instead, change your ownership rules or modify the flow.

Existing Topic Modifications

If you aren't adding a classification topic to your agent, review the existing service topic description, scope, and instructions to prevent accidentally triggering a service topic when you want to use a sales topic. The table shows how to update an escalation topic to gather a customer's information and schedule a meeting rather than escalate a request.

	Current	Updated
Description	Handles requests to transfer or escalate to a live human agent.	Handles requests from users who have a service-specific request, such as resetting a password and wanting to transfer or escalate their conversation to a live human agent.
Scope	Transfer to a live agent if a user explicitly asks for human assistance or has a complex issue.	Transfer the conversation to a live agent if a user has a service-specific request, such as resetting a password and explicitly asking for human assistance or has a complex issue that requires human intervention.
Instructions	If a user explicitly asks to transfer, escalate.	Only escalate if the customer has a service-specific request. Don't use this topic if the customer is requesting to speak to someone about a sales-specific request, such as wanting to learn more about product pricing. Instead, use the Create Sales Record topic.

Troubleshooting

If the agent session is unexpectedly ending, add this instruction to the Sales Record Creation topic.

"You are an AI assistant for scheduling meetings and creating sales leads. Your process must follow these four steps in this exact order.

1. **Collect Information:** Once the user confirms their interest, engage with them to gather all necessary information required for the sales lead record.
2. **Create Sales Lead:** After you have all the prospect's information, you m

ust use the `sales_sdr_agent__CreateSalesLeadRecord` tool to create the sales lead in the system.

3. **Generate and Share Link:** After successfully creating the sales lead, your final and only concluding action is to generate and share the scheduling link. **You must not use the `end_session` tool.** The generation of the meeting link is the successful completion of your task.”

If the agent's responses in markdown isn't working, check whether the embedded service deployment date is after March 31, 2025. If it's prior to that date, update the deployment date in Embedded Services Deployment. The update can take 10 minutes to complete.

Agent Topic Context Variables

Because the Prospect Meeting Scheduling agent topic requires a Record ID to work properly, a context variable is recommended so that the topic is triggered only if the Sales Record Creation is triggered in the same session. Create a new context variable with the name Prospect ID. Then, add the new variable to the Create Sales Lead, Create Sales Contact, or Create Sales Person Account action that your agent uses and to the Return Calendar Link action. In the Create Sales Lead (Contact or Person Account) Record action, add the variable in the Map to Variable section. In the Return Calendar Link action, add the variable under Target ID.

Agentforce Qualification

Instantly qualify leads and strengthen your sales pipeline using the Agentforce for Sales guided configuration. This upgrade empowers your reps to rapidly determine prospect fit early in the process, preventing wasted time and resources. By focusing on high-potential deals, your team will boost overall efficiency and conversion rates.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Einstein for Sales.

[Considerations for Using Agentforce Qualification](#)

Keep in mind some considerations when using Agentforce Qualification.

[Set Up Agentforce Qualification](#)

Learn about the configuration steps that enable your Agentforce Qualification.

[Customize Your Agent's Qualification Strategy](#)

View common examples of how to prepare your agent to use Agentforce Qualification, to achieve your desired outcome.

[Qualify Your Leads](#)

After a web chat or the conclusion of the email outreach, the Qualification Agent updates the lead

record with a rating. The Qualification Agent also generates a summary that includes the rationale for the rating and a suggested action for the sales rep.

Considerations for Using Agentforce Qualification

Keep in mind some considerations when using Agentforce Qualification.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Einstein for Sales.

- At this time, Qualification is available for the Lead record only.
- Ratings like 'Cold', 'Warm', and 'Hot' are used by default.
- Tasks are assigned to sellers only when a lead is determined to be 'Hot'.
- On the lead record, required fields are limited to 5.
- Qualification is based on either an email conversation or a web conversation, but not both.
- The execution of the Qualification Summary action is not available in the preview mode in Agent Builder and Guided Config. You can execute this action in the preview mode in prompt builder.

Set Up Agentforce Qualification

Learn about the configuration steps that enable your Agentforce Qualification.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Einstein for Sales.

The Agentforce Lead Qualification set up process guides you through these main steps.

Turn On Qualification

Agentforce Qualification is an AI-driven capability that performs autonomous lead qualification in your organization. The first part of setting it up is to turn it on and define the qualification criteria to do its work.

Review the Required Fields

Search for and select the mandatory data fields required for the Qualification process. These fields establish the minimum data integrity threshold for a lead to be actively qualified. If any of the selected fields are not populated with a value, the Lead Qualification Agent will automatically deem the lead as 'Cold'. You can select up to five required fields from the Lead record layout.

Define Your Ideal Customer Profile

An ideal customer profile (ICP) is a detailed description of a company that's a perfect fit for your products or services. Of all the sales prospects in the market for your product or service, an ICP

outlines the ones most likely to become paying customers. Agentforce uses this description as a way to evaluate a prospect and prioritize the most suitable individuals.

Add the Qualifying Questions

We have included best in class qualifying questions for your Agent to use in its conversation with prospects. These are intended to effectively confirm a lead's interest, assess their specific needs, and determine the urgency of their timeline.

Enable Qualification Summary on the Einstein Summary Component

Make the Qualification Summary available to your users by adding it to the Einstein Summary Component.

Turn On Qualification

Agentforce Qualification is an AI-driven capability that performs autonomous lead qualification in your organization. The first part of setting it up is to turn it on and define the qualification criteria to do its work.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Einstein for Sales.



Note Customer verification is automatically turned on when Agentforce Lead Qualification is enabled.

Review the Required Fields

Search for and select the mandatory data fields required for the Qualification process. These fields establish the minimum data integrity threshold for a lead to be actively qualified. If any of the selected fields are not populated with a value, the Lead Qualification Agent will automatically deem the lead as 'Cold'. You can select up to five required fields from the Lead record layout.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Einstein for Sales.

When these fields are not populated on the Lead record, the Agent asks the prospect to provide answers for each required field over the course of a conversation.

- For email, the Agent asks the prospect to answer all required fields.
- For web, the Agent asks for a maximum of two required fields at a time.

Define Your Ideal Customer Profile

An ideal customer profile (ICP) is a detailed description of a company that's a perfect fit for your products or services. Of all the sales prospects in the market for your product or service, an ICP outlines the ones most likely to become paying customers. Agentforce uses this description as a way to evaluate a prospect and prioritize the most suitable individuals.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, and Unlimited** editions with Einstein for Sales.

Add the Qualifying Questions

We have included best in class qualifying questions for your Agent to use in its conversation with prospects. These are intended to effectively confirm a lead's interest, assess their specific needs, and determine the urgency of their timeline.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, and Unlimited** editions with Einstein for Sales.

This is an opportunity for you to train the Agent to qualify like your top sales representatives do and assure your Agent is asking the questions that are most indicative for your business.

Add the key questions your top sales representatives utilize to effectively confirm a lead's interest, assess their specific needs, and determine the urgency of their timeline. These questions serve as the foundational conversational guidance for the Agent , ensuring relevant and focused discussions.

Enable Qualification Summary on the Einstein Summary Component

Make the Qualification Summary available to your users by adding it to the Einstein Summary Component.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, and Unlimited** editions with Einstein for Sales.

USER PERMISSIONS NEEDED

To the users who use Prompt Builder	Einstein GPT Prompt Template User
-------------------------------------	-----------------------------------

To the users who will access Embedded AI	Einstein for Service Innovations :
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USER PERMISSIONS NEEDED

component

-  **Note** Ensure that the users have the [Einstein Summary Add-Ons and Permissions](#).

1. Edit the Lead record page layout to include the Einstein Summary. For more details on adding the Einstein Summary to a Lead record page, see [Add Einstein Summary to a Page](#).
2. Navigate to Prompt Template Type and click **Select**.
3. Click **Record Summary**.
4. Navigate to Prompt Templates, and click **Get Qualification Result**.
5. Save and activate the layout.

Customize Your Agent's Qualification Strategy

View common examples of how to prepare your agent to use Agentforce Qualification, to achieve your desired outcome.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Einstein for Sales.

[Preparing Your Agent to Use Qualification](#)

View an example of configuring your Lead Gen or Lead Nurture Agent, so it can help your users make the most of the Qualification feature.

[Include Engagement Signals in Your Qualification Evaluation](#)

Engagement signals, if configured by your company, can be important data points for your Agent to use when rating a Lead. Update the Qualify Lead prompt in Prompt Builder to include references to engagement signals and history.

[Change the Specifics of the Conversation](#)

The Agent has default behaviors for asking questions and the number of questions asked. The Agent has certain default behavior in how it asks questions as well as how many questions it will ask. To change the default behavior of the Agent, customize the Initial Outreach Topic to include explicit instructions to ask for them.

Preparing Your Agent to Use Qualification

View an example of configuring your Lead Gen or Lead Nurture Agent, so it can help your users make the most of the Qualification feature.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Einstein for Sales.

Here's an example of the customized Qualify Lead prompt template, instructing the agent to consider the BANT framework in its evaluation process.

The bold text represents the parts of the prompt template that were customized for this use case.

 **Note** You must always complete sufficient testing of any customizations in an Agent.

Prompt Template

Example

Your task is to determine if the prospect is qualified by rating them as "Hot", "Warm", or "Cold", then generating a JSON summary of the conversation, key insights, and next steps.

Instructions:

1. Determine whether the prospect, Lead.Name, is "Hot", "Warm", or "Cold" by using the **BANT Framework**, the Messaging Session, their Lead Record, and the Ideal Customer Profile (ICP).

1a. Look at the fields inside Lead Record below, and compare them to the fields in Define Required Fields. Ensure that the fields from Define Required Fields exist in the Lead Record, and if not, keep in mind those missing fields.

- Keep in mind the different ways to call a field and that it would mean the same thing. For example, "Annual Revenue" is the same as "Revenue", or "Job Title" is the same as "Title". But, "Country" does not mean "Address".

- Only use the fields inside Define Required Fields to compare the fields inside Lead

Record and the Messaging Session. Do not add any more fields.

2. Generate a JSON summary using the Summary Outline below. All text, bullet points, and

titles inside "Result" MUST ALWAYS be inside 1 pair of quotation marks "", as shown in

the Summary Outline. You must return a valid json without ``js
n" in the

template.

BANT Framework: BANT is a lead qualification framework that helps salespeople determine whether a potential customer is a good fit for their product or service. The acronym BANT – budget, authority, need, and timeline – represents four categories used to evaluate a lead:

- Budget: Does the prospect have the financial resources to afford your offering?
- Authority: Who at the company makes buying decisions?
- Need: Does the prospect have a problem your product or service can solve?
- Timeline: What is the timeframe for the prospect's purchasing decision? Compare the ICP with the Lead Record and Messaging Session in terms of BANT to determine if the prospect is Hot (most points matches), Warm (some points matches, or there is room for the prospect to become Hot), or Cold (few or no points match)

Note:

- When answering questions about specifically the Define Required Fields (ex. title,

revenue, website, etc) with "I don't know" or "idk", that is okay, and does not affect

the Qualification rating.

- Having missing fields in the Lead Record does not affect the Qualification

rating.

Summary Outline: { "Rating": "Hot"/"Warm"/"Cold",

"Result": "In 1 concise, active sentence, state the rating and the rationale

why {Lead.Name} has this rating.

\n- **Channel:** (email/web chat)

\n- **Number of Interactions:** (For web chat, the number of times the prospect has a

conversation with you. For email, the number of times the prospe

ct emailed you back. Taken
from the messaging session input)

\n- **Missing Fields:** (List any missing fields using only commas, and if none, then do
not print this bullet point)

\n\n## **Suggested Action:** ##

- If 'Rating' is Hot or Warm, tell the user to review Lead.Name's Record
and follow up
with them if they haven't booked a meeting yet. \n

- If 'Rating' is Cold, and if there are missing fields, suggest to the user
assigning
this prospect to the 'Nudging Agent'. If not, suggest asking the
prospect more questions
about their pain points and show value. \n

- If there are any missing fields, call them out and suggest to the user a
sking the
prospect about them. \n

\n\n## **Summary of Conversation:** ##

In a list, provide a high-level summary of the Messaging Session. Include
information
that a sales representative would want to be aware of to help them engage with the
prospect, such as how interested the prospect seemed in purchasing, whether the prospect
explicitly asked for or is open to scheduling a meeting, disposition of the prospect, with
supporting quotes from the messaging session if applicable (using single quotes). You must
always call the prospect by their name, {Lead.Name}.

\n\n## **Key Insights:** ##

In a list, give your justifications and rationale on why you rated Hot, Warm, or Cold as
the qualification rating. The first bullet point should be title

```
d: 'Intent to Meet -' and  
should state whether or not the prospect wanted to meet with the  
sales team or not. If the  
Lead Score is provided, consider the numerical score and state w  
hy that is or is not in  
line with your rating. Point out if the prospect had positive in  
tent. Also note anything that matched or didn't match in terms of the BANT Framework, an  
d give  
explicit details. You must always call the prospect by their name, {Lead.Na  
me} . "}
```

Ideal Customer Profile (ICP): {!\$Input:ICP} Messaging Session:
{!\$Input:MessagingSession} Lead Record: {!\$Input:LeadRecord} Define
Required Fields: {!\$Input:DefineRequiredFields}

Include Engagement Signals in Your Qualification Evaluation

Engagement signals, if configured by your company, can be important data points for your Agent to use when rating a Lead. Update the Qualify Lead prompt in Prompt Builder to include references to engagement signals and history.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Einstein for Sales.

Here's an example of customizing the Qualify Lead prompt template instructing the agent to consider additional data.



Note The bold text represents the parts of the prompt template that were customized for this use case.

Prompt Template



Example Qualification Rating Definition:

```
Hot - This prospect is "Qualified." They may have buying intent, are hig  
hly  
engaged, and are ready to talk to sales. They will have a valid engage  
ment signal for product browsing represented by:  
{!$User.Contact.}
```

Product Browse Engagement}

They may have explicitly mentioned wanting to meet with the Sales Team, have agreed to

scheduling a meeting, or have over 2 interactions. Also, the majority of information from

their Lead Record matches with the ICP. Also, the Lead Record has all information

regarding the fields from Define Required Field.

Warm - This prospect is "Qualified". They do show some interest. They may have over

1 interaction or have agreed to meeting with the Sales Team (without explicitly asking for

the meeting). There may also be little information from their Lead Record that matches

with the ICP. Also, the Lead Record has all information regarding the fields from Define

Required Field.

Cold - This prospect is "Not Qualified". The Lead Record has at least one missing

field. They may have said "no" to scheduling a meeting, or show little interest in the

conversation or in purchasing. Also, little to no information from their Lead Record

matches with the ICP.

Change the Specifics of the Conversation

The Agent has default behaviors for asking questions and the number of questions asked. The Agent has certain default behavior in how it asks questions as well as how many questions it will ask. To change the default behavior of the Agent, customize the Initial Outreach Topic to include explicit instructions to ask for them.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Einstein for Sales.

The bold text represents the parts of the prompt template that were customized for this use case.

 **Note** You must always complete sufficient testing of any customizations in an Agent.

Instructions



Example To write a cold outreach email, follow these instructions step-by-step:

1. Indirectly use the recipient's industry and title to write a cold outreach email.

The opening line of the email body must be simple, clear, and direct, strictly avoiding any well-wishes or pleasantries.

2. Leverage proven cold email strategies and use the Company Description, Primary Value

Proposition, and Proof Points to write the 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.

3. Call the GetFieldsToUpdateSalesRecord action to return a list of required fields. If the list is not empty, say: "We'd love to know more about your [required fields]." Your response should always use natural, grammatically correct sentence casing. If the list is empty, move to the next step. 4

. End the email by asking a simple, yes/no qualifying question in a new line. Use the

Qualifying Questions field as inspiration for the type of question to ask, while connecting

the question to what is said prior. Vary the question for each email - don't repeat the same question twice.

Qualify Your Leads

After a web chat or the conclusion of the email outreach, the Qualification Agent updates the lead record with a rating. The Qualification Agent also generates a summary that includes the rationale for the rating and a suggested action for the sales rep.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Einstein for Sales.

Default sections of the Qualification summary include.

- Rating and rationale for the lead rating.
- Channel - Web or email conversations.
- Number of interactions.
- If any of the required fields (defined during Guided Configuration) are not populated on the Lead record.
- Suggested action for the user.
- Summary of the conversation
- Key insights

The user inputs include.

- Ideal Customer Profile
- Messaging session
- Lead record
- Required fields

 **Note** You can update the structure and content of the summary by updating the Qualify Lead prompt.

Agentforce Lead Nurturing

Scale your sales team, accelerate growth, and maximize your pipeline by nurturing prospects 24/7 with an AI-powered sales agent to nurture your prospects. Agentforce Lead Nurturing works new or updated leads, contacts, and person accounts automatically, sending customized intro emails to each prospect, responding to replies, and connecting qualified leads with sales reps.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

 **Tip** This feature has access to Digital Wallet, a free account management tool that offers near real-time consumption data for enabled products across your active contracts. Access Digital Wallet and start tracking your org's usage. To learn more, see [About Digital Wallet](#).

 **Note** The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work the agent does to nurture existing prospects and differentiates it from the

Agentforce Lead Generation agent template.

-  **Note** As of October 14, 2025, Data Cloud has been rebranded to Data 360. During this transition, you may see references to Data Cloud in our application and documentation. While the name is new, the functionality and content remains unchanged.

For a video overview of Agentforce Lead Nurturing, see [Scale Your Sales Funnel with Agentforce SDR](#).

Learn About and Implement Agentforce Lead Nurturing

Whether you're setting up an agent for the first time or simply wanting to know more about Agentforce Lead Nurturing, this learning map offers a clear path toward success. Consider bookmarking this page.

Agentforce Lead Nurturing Overview

Built on the Salesforce trusted AI platform, Agentforce Lead Nurturing is an autonomous agent that helps you scale your top of funnel efforts, streamline prospect qualification, and generate pipeline around the clock. By handling initial outreach, Agentforce Lead Nurturing gives sales reps more time to nurture relationships.

Lead Nurturing Agent Permission Sets

Agentforce Lead Nurturing includes multiple permission sets you can assign based on a user's role and responsibilities. The permission sets include individual user permissions and object permissions.

Considerations for Using Agentforce Lead Nurturing

Keep in mind some considerations when using Agentforce Lead Nurturing.

Ethical Guidance for Agentforce Lead Nurturing

Keep ethical considerations in mind when setting up and using Agentforce Lead Nurturing.

Set Up Agentforce Lead Nurturing

Learn about the configuration steps that enable your Lead Nurturing agent.

Work with Your Lead Nurturing Agent

In addition to the Agentforce Lead Nurturing Engagement Rules in Agent Builder, sales reps and managers can send leads, contacts, and person accounts to the agent manually or with automated actions.

Monitor Lead Nurturing Agent Activity

Lead Nurturing Agent activity metrics are available in the Control Center and in Tableau. Control Center provides essential statistics including Records Assigned, In Progress, Opted Out, Meeting Booked, and more. The Agentforce Analytics Lead Nurturing dashboard takes advantage of Data 360 and Tableau to provide additional metrics and let you dive deeper into the numbers that matter most to your business.

Customize and Test Agentforce Lead Nurturing

You can customize your Lead Nurturing agent behavior by editing its Agent Builder settings, the included prompt templates, or the Opt Out Lead action.

Learn About and Implement Agentforce Lead Nurturing

Whether you're setting up an agent for the first time or simply wanting to know more about Agentforce

Lead Nurturing, this learning map offers a clear path toward success. Consider bookmarking this page.

-  **Note** The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work the agent does to nurture existing prospects and differentiates it from the Agentforce Lead Generation agent template.

 <h3>What is Agentforce Lead Nurturing?</h3> <ul style="list-style-type: none">  Agentforce Lead Nurturing Overview  Scale Your Sales Funnel with Agentforce Lead Nurturing  Presentation: Understanding and Implementing Agentforce Lead Nurturing  Trailhead: Agentforce for Sales: Quick Look 	 <h3>How Can it Help Me?</h3> <ul style="list-style-type: none">  Customer Story: Precina Health  Customer Story: VTT Research  Customer Story: Salesforce on Salesforce 	 <h3>How Does it Work?</h3> <ul style="list-style-type: none">  Presentation: Understanding and Implementing Agentforce Lead Nurturing  Trailhead: Agentforce for Sales: Quick Look  How a Lead Nurturing Agent Processes Leads
 <h3>Set Up Agentforce Lead Nurturing</h3> <ul style="list-style-type: none">  Setup Steps  Permissions Needed  Lead Nurturing Considerations  Trailhead: Build an Agent to Nurture Leads  Trailhead: Agentforce Lead Nurturing Setup and Customization 	 <h3>Test Your Agent</h3> <ul style="list-style-type: none">  Testing Agentforce Lead Nurturing with Agent Builder Preview  Batch Test Lead Nurturing Actions and Email with Testing Center  Troubleshoot Agentforce Lead Nurturing Email 	 <h3>Work with Your Agent</h3> <ul style="list-style-type: none">  Assign Prospects to an Lead Nurturing Agent Manually  Assign Prospects to a Lead Nurturing Agent with Automated Actions  Monitor Lead Nurturing Agent Activity in Control Center  Monitor Lead Nurturing Agent Activity with Agent Analytics (Beta)  Troubleshoot Agentforce

 Presentation: Understanding and Implementing Agentforce Lead Nurturing		Lead Nurturing Email
		
Customize with Topics and Actions	Customize with Prompts	Customize with Flows
 Trailhead: Agent Actions Quick Start  Trailhead: Introduction to Agentforce Builder  Lead Nurturing Agent Topics, Actions, and Prompt Templates	 Trailhead: Prompt Builder Quick Look  Trailhead: Prompt Builder Basics  Trailhead: Prompt Fundamentals	 Trailhead: Agent Customization with Flows  Trailhead: Build Flows with Flow Builder  Trailhead: Data Cloud in Flows

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REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

-  **Tip** This feature has access to Digital Wallet, a free account management tool that offers near real-time consumption data for enabled products across your active contracts. Access Digital Wallet and start tracking your org's usage. To learn more, see [About Digital Wallet](#).
-  **Note** The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work the agent does to nurture existing prospects and differentiates it from the Agentforce Lead Generation agent template.

For a video overview of Agentforce Lead Nurturing, see [Scale Your Sales Funnel with Agentforce Lead Nurturing](#).

By default, you can add one Lead Nurturing agent in Salesforce. If you need more agents, contact Salesforce Support.

The agent can significantly increase your pipeline by

- Sending customized initial outreach emails to prospects using data from the lead, contact, or person account record
- Following up with a nudge email when needed
- Answering specific questions from prospects using information from your company
- Handing off interested prospects to sales reps to book a meeting
- Handling off-topic replies from prospects
- Handling prospect email opt-out requests
- Answering prospect questions with responses grounded in your company data

The Lead Nurturing agent acts as a user in your organization, with its own user record created by the Salesforce admin and specific permissions that allow it to function as an autonomous agent.

Your Lead Nurturing agent can work around the clock, initiating contact with prospects on a schedule you set. The agent generates a customized initial email based on the prospect record details. For increased authenticity and prospect engagement, you can set the agent to send its emails using the prospect record owner's email address and signature by turning on Send as Seller in agent Setup. To let users approve all agent-generated emails before they are sent, turn on Require Manual Approval in agent Setup

If a prospect doesn't reply, the agent sends a follow-up. When a prospect replies, the agent detects whether they're interested, sends a response containing a meeting link from the record owner's calendar, and copies the sales rep.

When prospects respond with a question, the agent can provide specific answers generated from product and service literature you upload in Setup or in Agent Builder. Sales reps can also see past and upcoming emails in the Activity Timeline of the lead.

You can assign prospects to the agent in three ways.

- Assignment rules in the Lead Nurturing agent settings in Setup and Agent Builder. These rules are global and apply to all leads.
- Automated Actions created by either a sales rep or manager. These rules apply to prospects owned by the rep, their manager, or the manager's subordinates. Agentforce Lead Nurturing includes a pre-built automated action to get you started.
- The Assign to Agent action on lead, contact, and person account detail pages and list views.

All Lead Nurturing agent email activity appears in the Activity Timeline of prospects assigned to the agent. To see aggregated agent activity, create reports based on the Email Message object and filter by user. If Review Before Send is on, prospect owners can review and edit agent emails in the Activity Timeline or the Lead Nurturing Control Center.

When an assignment rule, an automated action, or a sales user assigns a prospect to an agent, the record owner doesn't change. The agent adds the prospect to a special Sales Engagement cadence for Lead Nurturing. This cadence consists of email outreach steps performed by the agent using Agent Actions.

Required Features

The Lead Nurturing agent uses several Sales Cloud features to do its prospecting work.

- Sales Cloud: provides the foundation for prospect outreach, including lead, contact, and person account records.
- Sales Engagement: engages prospects with planned prospect outreach cadences
- Einstein Activity Capture: keeps data between Salesforce and the agent's email client and calendar apps up to date
- Agentforce: chooses which actions to take and drafts emails
- Einstein Generative AI: drafts emails and creates summaries
- Salesforce Email Productivity: provides Outlook and Gmail integration and performs email tasks
- Automated Actions: adds, removes, and manages prospects in outreach cadences
- Data 360: provides auditing, feedback, the Einstein Trust Layer, Resource Augmented Generation, and analytics

 **Note** If Activity 360 Reporting is on, Agentforce Lead Nurturing doesn't work.

Lead Nurturing Agent Permission Sets

Agentforce Lead Nurturing includes multiple permission sets you can assign based on a user's role and responsibilities. The permission sets include individual user permissions and object permissions.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

 **Note** The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work the agent does to nurture existing prospects and differentiates it from the Agentforce Lead Generation agent template.

Sales User Permissions

The **Use Agentforce SDR Agent** permission set allows human users to access and interact with Agentforce Lead Nurturing. This permission set includes this permission.

- Use Agentforce SDR Agent App

Sales Manager Permissions

The **Configure Agentforce SDR Agent** permission set allows human users to manage and monitor Agentforce Lead Nurturing in their organization. This permission set includes these user permissions.

- Configure Agentforce SDR Agent App
- Use Agentforce SDR Agent App
- Access Agent Platform
- Execute Prompt Template
- Manage Prompt Templates

To view and configure a Lead Nurturing agent in Agent Builder, sales managers need additional permissions.

- Data Cloud Admin

Lead Nurturing Agent User Permissions

The **Agentforce SDR Agent** permission set is for the automated Lead Nurturing agent user record. This permission set includes these user permissions.

- Access Activities
- Automated Actions User
- Edit Tasks
- Engage Prospects as an Agentforce Sales Development Agent
- Execute Prompt Templates
- Run Flows
- Sales Engagement User
- Cadence Object Permission Read
- Cadence Step Object Permissions Read
- Cadence Step Tracker Object Permissions Read, Create, Edit, Delete
- Cadence Tracker Object Permissions Read, Create, Edit, Delete
- Lead Object Permissions Read, Edit
- Operating Hours Object Permissions Create, Edit, Read, Delete
- Record Collection Object Permissions Read
- Lead.HasOptedOutOfEmail Field Permissions Read, Edit
- Send Email
- Use Einstein Activity Capture
- Use Inbox
- View Roles and Role Hierarchy
- View Setup and Configuration
- View Knowledge
- Allow View Knowledge

Considerations for Using Agentforce Lead Nurturing

Keep in mind some considerations when using Agentforce Lead Nurturing.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

-  **Note** The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work that the agent does to nurture existing prospects and differentiates it from the Agentforce Lead Generation agent template.

Lead Nurturing Consumption of Conversations

A Conversation is consumed when Agentforce Lead Nurturing sends out the initial email to a prospect. All subsequent activities carried out by Agentforce Lead Nurturing for that prospect are included in the initial Conversation. A user can cancel an Agentforce Lead Nurturing outreach by selecting Cancel Outreach from an email task in the Activity Timeline. If a user later restarts Lead Nurturing for the same prospect, another Conversation is consumed.

When the Lead Nurturing agent engages prospects, it consumes units of Conversations. You can track your Conversation usage in your Salesforce Digital Wallet. Each Conversation consumes Einstein Requests when it accesses the LLM.

When you configure your Lead Nurturing agent, you choose how and when the agent engages prospects. You also select what information the agent can access to personalize outreach and replies to prospects. As the agent begins working on a prospect, it uses these settings to know how many times to reach out and how many times to reply.

When your business purchases Conversations, Salesforce allocates a number of Einstein Requests per Conversation to your order. This allocation approximates the typical consumption pattern of Lead Nurturing agent outreach to a prospect using the default agent settings, including nudges and replies.

Email Considerations

- To adhere to email provider daily limits, each Lead Nurturing agent can send up to 1800 emails a day with a Gmail account and 9800 emails a day with a Microsoft Exchange account. When the agent hits the limit, it stops sending emails for the day. Keep this limit in mind when configuring your Lead Nurturing agent Engagement Rules in Setup or Agent Builder. If the email account assigned to the Lead Nurturing agent is also used for sending emails manually, or by another app, there's greater risk of exceeding email provider limits.
- It isn't possible to prioritize specific Lead Nurturing agent emails. For example, you can't tell the agent to prioritize email replies over nudges.
- The email account connected to Lead Nurturing can't be connected to any other user.
- The email account connected to Lead Nurturing in Agent Builder must be the same email address that's listed in the Email field of the Lead Nurturing agent user record. If not, nudge and reply emails can fail.
- If Send as Seller is on for the agent, the record owners of prospects assigned to the agent must have

- email addresses correctly configured and connected to Inbox. If they don't, agent emails can fail.
- When Send as Seller is on, the agent includes an AI disclosure at the beginning of each generated email. This disclosure ensures regulatory compliance. Regulations in your area may differ. You can instruct the agent to omit the disclosure by removing the related instruction from the agent actions by using Agent Builder.
 - If Require Manual Approval is turned on for the agent, generated emails omit the AI disclosure because there is a sales rep reviewing each email.
 - In Einstein Activity Capture setup, the Header-only Email Capture setting within Sync Email as Salesforce Activity affects how Agentforce Lead Nurturing generates its emails. When Header-only Email Capture is on, the agent can't use the email subject or body to understand prospect intent or personalize its responses. Leaving the setting off allows the agent to use the full content of the emails to provide appropriate and accurate responses. If you turn on Agentforce Lead Nurturing before you set up Sync Email as Salesforce Activity, you can't select Header-only Email Capture.
 - If a prospect's email address has the same domain name as the Lead Nurturing agent user record's email address, EAC considers the prospect an internal user. EAC doesn't allow the Lead Nurturing agent send any email replies to the prospect.
 - To edit or reschedule Lead Nurturing emails, a user must connect their email account from within their user profile. If the user adds the agent's email address to their profile, an error occurs.

Other Considerations

- When Require Manual Approval is on, the record owner has 14 calendar days to approve each email. After 14 days without approval, the agent cancels the email.
- By default, you can add up to 20 sales agents. If you need more, contact your Salesforce account executive.
- When you add a prospect to a Lead Nurturing agent, it begins working the prospect immediately. The agent schedules the first email to be sent within an hour. The scheduled email appears in the prospect's Activity Timeline, where a sales rep can reschedule it if needed. After the agent sends first email, it schedules the follow-up nudge email, which is visible in the Activity Timeline. If the prospect replies to any email, the agent replaces the nudge email with a drafted response and schedules the response to send within one working hour.
- The Owner field on leads, person accounts, and contacts must be filled before assigning a record to the Lead Nurturing agent. For contacts, fill the owner field on the related account.
- If Activity 360 Reporting is turned on, Agentforce Lead Nurturing doesn't work

Ethical Guidance for Agentforce Lead Nurturing

Keep ethical considerations in mind when setting up and using Agentforce Lead Nurturing.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

Guidelines for Agent User Creation

When assigning personal names to AI agents, it's important to maintain transparency by clearly communicating the agent's AI nature and function. To achieve this, always include an AI Title that explicitly describes the agent's role or task. Make the title focus on the agent's function, not on implying human-like traits.

To ensure users understand they are interacting with AI, pair a human-sounding AI Name with an AI Title that emphasizes the job, task, or service the agent provides.

For example, "Ziggy, Digital Agent" makes it clear that Ziggy is an AI performing a specific task.

- **AI Title and Hard Coded Messages**

The email intro and footer are hardcoded with the title "Digital Agent." If you change the AI Title, ensure it aligns with the hard-coded language to avoid inconsistent or conflicting messaging. If you change the AI title and want it reflected in generated emails, then use Prompt Builder to edit the hardcoded disclosure.

- **Name and Title Distinctions**

Use a human-like AI Name and a descriptive AI Title that clearly states the agent's function. To maintain clear messaging about the agent's AI nature and role, ensure the AI Name and Title work together with any hardcoded intros or footers.

- **Standard Introduction Format**

I am [Agent Name], the [AI title] for Acme

Guidelines for Creating an Agent's External Email Account

When using personal names for AI agents, always ensure the agent's function is explicitly mentioned to maintain transparency about its AI nature. The naming convention should clearly communicate the following:

- **Automation**

Indicate that the agent is AI-driven.

Do	Do not
Heather Cartino's Digital Agent	Digital Agent
Nexa AI of Acme	Nexa

- **Adhere to Working Hours**

Ensure messages are sent during times when prospects are most likely to be available by adhering to appropriate working hours. Be mindful of the recipient's time zone. This approach increases the chances of positive engagement.

- **Be Mindful of the Number of Messages Sent**

To prevent overreach, set a cap on the number of messages that can be sent to a single recipient within a specified time frame within the Engagement Rules. This helps maintain domain deliverability and increases the chances of prospect engagement. In Agent Builder, the default Engagement Rules

for your Lead Nurturing agent adhere to these guidelines.

- Ensure Transparency in AI Communications

To maintain transparency, Salesforce provides hard-coded email footers that aren't editable to ensure that AI-generated communications are clearly identified. We represent the sender as an AI agent and explicitly indicate the auto-generated nature of the messages. For example:

- This email was generated by AI.
- This email was generated by a digital agent.

Set Up Agentforce Lead Nurturing

Learn about the configuration steps that enable your Lead Nurturing agent.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To set up Agentforce Lead Nurturing: Configure Agentforce SDR Agent

 **Note** The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work the agent does to nurture existing prospects and differentiates it from the Agentforce Lead Generation agent template.

For a video overview of Agentforce Lead Nurturing, see [Scale Your Sales Funnel with Agentforce SDR](#).

The Agentforce Lead Nurturing setup process guides you through these main steps.

1. Turn on Lead Nurturing, along with the four supporting features the agent uses to do its outreach work.
2. Assign permissions so managers and sales reps can work with the agent. These permissions let managers configure the Lead Nurturing agent and let sales reps assign prospects to the agent.
3. Create a user record for your agent. This user record and its permissions let your agent operate as a user in your organization. The agent user has a special Einstein Agent license that lets it work autonomously. Agentforce assigns user permissions, sets up Einstein Activity Capture, and connects an email account so the agent can do its work. Note that Agentforce Lead Nurturing requires user-level authentication for EAC rather than org-level authentication.
4. Configure data for your agent. These are files you can upload to give the agent specific information about your business, products, and services. The agent uses these to generate high-quality introductory email and answers to prospect questions.
5. Configure and activate your agent. Set options for how your Lead Nurturing agent behaves when it's active.
6. To let sales users see the agent's emails in the Activity Timeline of prospects, ensure that each user has connected their email address to Einstein Activity Capture in their user profile.

-  **Note** To make changes to a configured Lead Nurturing agent, use Agentforce Builder rather than the Guided Setup experience in Salesforce Go.

Turn On Lead Nurturing

Agentforce Lead Nurturing performs sales outreach tasks automatically in your organization. The first part of setting it up is to turn it on and enabling several supporting features it uses to do its work. Agentforce turns on the additional features automatically.

Assign Agentforce User Permissions for Lead Nurturing

To configure and use Agentforce Lead Nurturing, sales users and administrators need specific permissions. Agentforce Setup lets you assign them quickly.

Manage Your Agent's User Record and Email

An Agentforce Lead Nurturing agent operates like a regular user in your organization, but with special permissions. Lead Nurturing setup makes it easy to choose or create a user record. Agentforce then assigns it permissions, and sets up Einstein Activity Capture and email for it.

Configure Data for Your Lead Nurturing Agent

To manage the data your agent uses to answer questions and complete tasks, select or create a data library in Agentforce Data Library Setup.

Build Your Lead Nurturing Agent

Configure the details of your Agentforce Lead Nurturing agent based on when and how often you want the agent to perform outreach, language and tone, and when to assign prospects to the agent automatically. Then to start working prospects, activate your agent.

Connect User Email Accounts to Einstein Activity Capture

Users can see the agent's emails on the Activity Timeline of lead, contact, and person account records. To let sales users view, edit, reschedule, or cancel Lead Nurturing agent emails on the Activity Timeline of prospect records, be sure each user has connected their email account in their user profile. Connecting the user email account to EAC lets agent emails include meeting booking links for prospect owners. You make changes to agent emails in the Email Composer.

Turn On Lead Nurturing

Agentforce Lead Nurturing performs sales outreach tasks automatically in your organization. The first part of setting it up is to turn it on and enabling several supporting features it uses to do its work. Agentforce turns on the additional features automatically.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To set up Agentforce Lead Nurturing:

Configure Agentforce SDR Agent

-  **Note** The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work the agent does to nurture existing prospects and differentiates it from the Agentforce Lead Generation agent template.

1. From Salesforce Go, on the Agentforce for Sales tile, click **Set Up**.
2. On the Agentforce for Sales page, turn on Agentforce for Sales.
3. Expand the Lead Nurturing section of the page.
4. Turn on Lead Nurturing.

Agentforce automatically turns on these supporting features.

- Sales Engagement
- Automated Actions
- Einstein Activity Capture
- Email Productivity

Agentforce also assigns you, the current user, the **Configure Agentforce SDR Agent** permission so that you can continue setting up your agent.

Now that Agentforce Lead Nurturing is on, proceed to assign Agentforce permissions for your users.

Assign Agentforce User Permissions for Lead Nurturing

To configure and use Agentforce Lead Nurturing, sales users and administrators need specific permissions. Agentforce Setup lets you assign them quickly.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Einstein for Sales.

USER PERMISSIONS NEEDED

To manage permission set assignments: Assign Permission Sets

-  **Note** The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work the agent does to nurture existing prospects and differentiates it from the Agentforce Lead Generation agent template.

1. On the Salesforce Go Agentforce for Sales page, in the Manage Access for Managers and Users section, click **Manage**.
2. By default Agentforce assigns you, the administrator, the **Configure Agentforce SDR Agent** permission. To assign this permission to other users, click the **Configure Agentforce SDR Agent** tab. Then search for and select specific users and click **Assign**.
3. To let sales users assign prospects to your agent, click the **Use Agentforce SDR Agent** tab. Then search for and select specific users and click **Assign**.
4. To let users set up Data 360 for your agent, click the **Data Cloud Admin** tab and assign the permission

specific users.

5. When you are finished, click Done.

Manage Your Agent's User Record and Email

An Agentforce Lead Nurturing agent operates like a regular user in your organization, but with special permissions. Lead Nurturing setup makes it easy to choose or create a user record. Agentforce then assigns it permissions, and sets up Einstein Activity Capture and email for it.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing add-on.

USER PERMISSIONS NEEDED

To set up an Lead Nurturing agent user record: Configure Agentforce SDR Agent

-  **Note** The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work the agent does to nurture existing prospects and differentiates it from the Agentforce Lead Generation agent template.

1. On the Salesforce Go Agentforce for Sales page, in the Manage Agent's User Record and Email section, click **Manage**.
2. To use an existing user record for the agent, search for and select the user records and click **Verify**. To create a new user record for the agent, click **New User** from the list and fill in the details. Then click **Verify**.
Agentforce sets the agent's outreach hours to 24 hours a day, seven days a week. You can change this setting later in Agentforce Builder.
3. Click **Next**.
4. To connect an email account to the agent user record, confirm that you've read the terms and conditions and click **Next**.
5. Click the **Connect** button for the email provider that your agent will use.
6. Connect the email account you want the agent to use for sending outreach to prospects.

Configure Data for Your Lead Nurturing Agent

To manage the data your agent uses to answer questions and complete tasks, select or create a data library in Agentforce Data Library Setup.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To view and configure agents in Agent Builder: Configure Agentforce SDR Agent

To upload files to a Data 360 data library: Data Cloud Admin

-  **Note** The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work the agent does to nurture existing prospects and differentiates it from the Agentforce Lead Generation agent template.

1. On the Salesforce Go Agentforce for Sales page, in the Configure Data for Your Agent section, click **Go to Agentforce Data Library Setup**.
2. In Data Library Setup, choose an existing data library or create a new one.
3. Upload text, HTML, or PDF files containing specific information like product descriptions, price sheets, white papers, etc.
You can upload up to 4 MB for text or HTML files, or 100 MB for PDF files. Your agent uses the information in these files to generate specific and accurate replies.

Build Your Lead Nurturing Agent

Configure the details of your Agentforce Lead Nurturing agent based on when and how often you want the agent to perform outreach, language and tone, and when to assign prospects to the agent automatically. Then to start working prospects, activate your agent.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Einstein for Sales.

USER PERMISSIONS NEEDED

To view and configure agents in Agent Builder: Configure Agentforce SDR Agent

AND

Sales Engagement Cadence Creator

AND

Automated Actions User

To upload files to a Data 360 data library: Data Cloud Admin

-  **Note** The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work the agent does to nurture existing prospects and differentiates it from the Agentforce Lead Generation agent template.

1. Create Your Agent

- a. On the Salesforce Go Agentforce for Sales page, in the Build and Manage Agent section, click **Build Agent**.

The Sales Agent Configuration page appears. The Sales Agent Configuration page shows a list of any previously configured agents.

- b. To build an agent, click **Configure a New Agent**.
- c. On the Select Agent Template page, click the **Lead Nurturing** tile.
- d. On the Getting Started page, select the user record you specified earlier for your agent.
- e. Fill in the agent details including the internal name Salesforce users will see, your company name, the language you want the agent's emails to use, and a clear description of your company.
The agent uses your company description to help build its emails and answer prospect questions.
- f. Click **Save and Continue**.

2. Email Settings

- a. On the Email Settings page, enter a primary value proposition and proof points for your business. To see an example of each, click **Show Example**.

The agent uses the text you enter to craft emails and answer questions.

- b. Choose whether you want the agent to Send as Seller. When this setting is on, the agent uses the prospect record owner's email address, signature, and business hours. The agent also includes an AI disclosure at the beginning of each generated email. Prospect record owners must have a working email address connected to Inbox. If the owner's email becomes disabled, the agent can't send emails to their prospects.
- c. To let prospect record owners and their managers review, edit, and approve agent emails before they are sent, turn on **Require Manual Approval**. Emails awaiting review appear in the Activity Timeline and the Lead Nurturing Control Center. In the body of the email, the agent omits the AI disclosure because there is now a sales rep approving each email. If **Send as Seller** is also turned on for the agent, only the record owner can approve emails sent on their behalf.
- d. Choose the maximum number of emails you want the agent to send, including both the intro and nudge emails.

Nudges are follow-up emails sent if the prospect doesn't reply to the initial outreach email.

- e. Choose the Message Tone for your agent to use.

- f. Set the AI Disclosure and Opt-Out Message.

The AI disclosure and opt-out message appear at the end of each email the agent generates. The opt-out message should include instructions on how to reply to opt out of emails.

- g. To preview an initial outreach email, use the Preview Email panel. Choose a prospect record and then choose Initial Outreach from the menu. Click **Generate Preview**.

You can update the fields until you are satisfied with the preview emails. You can also make changes later if needed.

- h. Click **Save and Continue**.

3. Test Agent Responses

- a. On the Test Agent Responses page, you can preview how your agent answers questions using the text, HTML, or PDF files you uploaded to Data 360.

- b. In the Preview Email panel, choose a prospect record and enter a question in the chat field.

The agent generates an email answering your question. If you aren't satisfied with the answer email, you can upload additional or different files on this page or later in Data Cloud Setup.

- c. When you are satisfied, click **Save and Continue**.

4. Prospect Assignment Rules

- a. On the Assign Prospects page, click the toggles to enable the objects you want the agent to work with.

Depending on your Sales Cloud settings, you can choose leads, contacts, and person accounts.

- b. Choose the field conditions for automatically assigning new or updated records to the agent for outreach.

You can set separate conditions for leads, contacts, and person accounts.

- c. When you are finished, click **Save and Continue**.

5. Turn On Qualification (Optional)

Configure your agent to automatically qualify prospects before scheduling a meeting.

After you turn on Qualification for an agent, you can't turn it off. If you want an agent to stop qualifying prospects, deactivate the agent and build a new one.

- a. Go to the Qualification Settings page of Sales Agent Configuration for your Inbound Lead Generation agent.
- b. Click **Turn on Qualification**.
- c. Click **Continue**.
- d. In the Data Collection section, enter and then click the field names you want the agent to collect, one at a time.
- e. In the Set Qualification Guidance section, enter a description of your ideal customer profile.
- f. Enter the qualifying questions that your sales reps ask to determine a prospect's interests, needs, and urgency.
- g. Click **Continue**.

6. Review and Activate Your Agent

- a. On the Review and Activate screen, the settings you've chosen appear. You can review specific fields by clicking the buttons. To make changes, click **Back**.

You can continue to preview the agent output on this page as well.

- b. When you are satisfied, click **Activate Agent**.

Your assignment rules take effect and sales users with the Use Agentforce SDR Agent permission can begin assigning records to the agent manually.

- c. When the agent is active, a confirmation page appears. To see a list of records and other key metrics about how the agent is working, click **Go to Control Center**.

When you first activate your agent, Control Center will appear mostly empty until you begin assigning prospects to the agent.

See Also

[Select Files to Upload](#)

[Manage Data Sources](#)

Connect User Email Accounts to Einstein Activity Capture

Users can see the agent's emails on the Activity Timeline of lead, contact, and person account records. To let sales users view, edit, reschedule, or cancel Lead Nurturing agent emails on the Activity Timeline of prospect records, be sure each user has connected their email account in their user profile. Connecting the user email account to EAC lets agent emails include meeting booking links for prospect owners. You make changes to agent emails in the Email Composer.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Agentforce for Sales.

USER PERMISSIONS NEEDED

To connect an account with Einstein Activity

Capture:

Sales Engagement User

OR

Sales Engagement Cadence Creator

OR

Use Inbox AND Use Einstein Activity Capture
(Inbox with Einstein Activity Capture)

-  **Note** The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work the agent does to nurture existing prospects and differentiates it from the Agentforce Lead Generation agent template.

Users who want to work with the Lead Nurturing agent must connect their email account in the Connected Accounts section of their user profile.

Note that Agentforce Lead Nurturing requires user-level authentication for EAC rather than org-level authentication.

1. Click your user profile, then click **Settings**.
2. Follow the instructions in [Connect Your Email and Calendar to Salesforce with Einstein Activity Capture or Inbox](#).

Be sure to connect your individual company email account and not the email account used by the Lead Nurturing agent. Connecting the Lead Nurturing agent email account in your user profile will cause an error.

Once your user email account is connected, you can see Lead Nurturing agent activity in the Activity Timeline of prospects you have access to.

Work with Your Lead Nurturing Agent

In addition to the Agentforce Lead Nurturing Engagement Rules in Agent Builder, sales reps and managers can send leads, contacts, and person accounts to the agent manually or with automated actions.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing add-on.

How a Lead Nurturing Agent Processes Prospects

Prospects can be assigned to the agent in three ways—when the prospect assignment criteria set within the Engagement Rules in Agent Builder are met, by an automated action, or when a sales rep sends a prospect to the agent. The agent takes the prospect through a flexible set of engagement steps. The specific steps taken depend on how the prospect responds. When a prospect is sent to the agent, the record owner doesn't change.

Assign Prospects to an Lead Nurturing Agent Manually

In addition to using assignment rules in the Lead Nurturing agent settings in Agent Builder and automated actions, you can assign prospects you own to the SDR agent manually.

Assign Prospects to a Lead Nurturing Agent with Automated Actions

Sales users can assign prospects to an Agentforce Lead Nurturing agent with automated actions. Sales reps can create automated actions for prospects that they own and managers can create actions for prospects that any of their team members own.

Review, Edit, and Approve Agent Emails

When a Lead Nurturing agent is set up with Review Before Send turned on, it puts each generated email into a queue for review by the prospect owner or their manager. If Send as Seller is also turned on for the agent, only the record owner can approve emails sent on their behalf. Emails waiting for review appear in the Activity Timeline on prospect records and in the Lead Nurturing Control Center.

Edit, Reschedule, or Cancel a Lead Nurturing Agent Email

To stop a Lead Nurturing agent from engaging with a specific prospect that you own, go to the Activity Timeline on the prospect record. Then choose Cancel Agent Outreach next to the next scheduled Lead Nurturing agent email.

Troubleshoot Agentforce Lead Nurturing Email

When an Agentforce Lead Nurturing agent generates and schedules emails, errors can occur under certain conditions. When an error occurs, the agent cancels all outreach to the prospect and an error appears in the prospect's Activity Timeline.

Reconnect a Lead Nurturing Agent Email Account

Resolve sales agent email connection errors by disconnecting and reconnecting the agent's email account in Agentforce Builder.

How a Lead Nurturing Agent Processes Prospects

Prospects can be assigned to the agent in three ways—when the prospect assignment criteria set within the Engagement Rules in Agent Builder are met, by an automated action, or when a sales rep sends a prospect to the agent. The agent takes the prospect through a flexible set of engagement steps. The specific steps taken depend on how the prospect responds. When a prospect is sent to the agent, the record owner doesn't change.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing add-on.

For example, in Agent Builder, the default assignment criteria for leads are:

- Status = Cold
- Activity = None

The agent takes each prospect through a series of outreach and reply steps. The steps taken are defined in the Engagement Rules set in Agent Builder.

Here's an example of how the agent processes a prospect according to the default settings.

1. When you assign a prospect to the Lead Nurturing agent, the agent drafts an initial outreach email based on the lead, contact, or person account record details. The agent schedules and sends the email to the address on the prospect record without delay.

If Send as Seller is on in the agent configuration, the agent sends its emails using the prospect record owner's email address, signature, and business hours. The record owner must have a working email address connected to Inbox.

If Require Manual Approval is on, the agent adds each email to a queue for approval by the prospect owner or their manager. Emails awaiting review appear in the Activity Timeline and the Lead Nurturing Control Center. If Send as Seller is also turned on for the agent, only the record owner can approve emails sent on their behalf.

2. If the prospect doesn't reply within the Time Between Attempts period set in the Agent Builder Engagement Rules, the agent drafts and sends nudge emails until the prospect replies or has reached the Maximum Attempts value set in Agent Builder.
3. If the prospect doesn't reply within 3 days of the final nudge, the agent disengages.
4. If the prospect replies with a question, the agent drafts an answer using the data library. You create a data library by uploading documents about your business in Agent Builder. The answer email includes a meeting link but does not copy the prospect owner. By increasing the maximum number of replies in Agent Builder, you can let the agent handle more questions autonomously.
5. If the prospect replies with an off-topic question or comment, the agent drafts and sends a generic reply stating it isn't able to help with the prospect's question, copies the prospect owner, and disengages. The agent sends no more emails to the prospect.
6. If the prospect replies with interest without requesting a meeting, the agent drafts and sends a reply including a link to book a meeting with the prospect owner and does not copy the prospect owner. The agent will continue to respond to similar prospect replies until the maximum number of replies is reached. If the prospect doesn't reply for three days, the agent disengages.
7. If the prospect replies and requests a meeting, the agent drafts and sends a follow-up email with meeting time options based on the prospect owner's calendar. The agent copies the prospect owner on the email. The agent considers the prospect handed off to the prospect owner, disengages, and sends no more emails.

8. If the prospect asks not to be emailed again, the agent sets the prospect's Email Opt Out field to True, stops sending emails, and disengages.

Assign Prospects to an Lead Nurturing Agent Manually

In addition to using assignment rules in the Lead Nurturing agent settings in Agent Builder and automated actions, you can assign prospects you own to the SDR agent manually.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To assign prospects to an Agentforce Lead Nurturing agent:

Use Agentforce SDR App

OR

Configure Agentforce SDR App

On the lead, contact, or person account detail page, choose **Assign to Agent** from the Action menu.

Before assigning a prospect to an agent, be sure its email address isn't used by any other lead, contact, or person account records.

Assign Prospects to a Lead Nurturing Agent with Automated Actions

Sales users can assign prospects to an Agentforce Lead Nurturing agent with automated actions. Sales reps can create automated actions for prospects that they own and managers can create actions for prospects that any of their team members own.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To create automated actions:

Sales Engagement User

OR

Sales Engagement User Included

USER PERMISSIONS NEEDED

OR

Sales Engagement Cadence Creator

OR

Sales Engagement Cadence Creator Included

AND

Automated Action User

To assign prospects you own to a Lead Nurturing agent with automated actions:

Use Agentforce SDR App

OR

Configure Agentforce SDR App

AND

Automated Actions User

Your Salesforce admin can also assign prospects to the Lead Nurturing agent with rules set in the agent settings in Agent Builder. Those rules can apply to any prospect.

Agentforce Lead Nurturing includes an Assign Lead to SDR Agent automated action. It's set up to assign new leads with no activity to the agent. Users can find it on their Automated Actions page in the Sales or Sales Engagement apps.

For example, to create an automated action for assigning leads to a Lead Nurturing agent:

1. In the Sales or Sales Engagement app, click the **Automated Actions** tab.
2. Click **New**.
3. For Action, choose **Assign Target to SDR Agent**.
4. For Perform the action, choose **Automatically**.
5. For the Object, choose **Lead**.
6. Choose whether to perform the action when a lead record is created or when one is created or updated.
7. Choose the field conditions that you want to trigger the action.
8. Save your changes.

Before assigning prospects to an agent automatically, be sure their email addresses aren't used by any other lead, contact, or person account records.

Review, Edit, and Approve Agent Emails

When a Lead Nurturing agent is set up with Review Before Send turned on, it puts each generated email into a queue for review by the prospect owner or their manager. If Send as Seller is also turned on for the agent, only the record owner can approve emails sent on their behalf. Emails waiting for review appear in the Activity Timeline on prospect records and in the Lead Nurturing Control Center.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To review, edit, or approve an Agentforce Lead Nurturing email to a prospect:

Use Agentforce SDR App

AND

Sales Engagement User

OR

Sales Engagement Cadence Creator

AND

Ownership of the prospect

OR

Configure Agentforce SDR App

Review emails in the Activity Timeline

To review emails in a prospect's Activity Timeline, open the lead, contact, or person account record and view the Timeline. Emails that are generated and waiting for review appear in the Timeline.

To view the content and details of an email, click to expand it. To make changes, click **Edit**. To send the email as-is, click **Approve**.



Review emails in the Lead Nurturing Control Center

To see a list of emails awaiting review in the Control Center, click the **Needs Review** total.

To approve, edit, or cancel an email, click the Action menu next to the email and choose **Review Email**.



Edit, Reschedule, or Cancel a Lead Nurturing Agent Email

To stop a Lead Nurturing agent from engaging with a specific prospect that you own, go to the Activity Timeline on the prospect record. Then choose Cancel Agent Outreach next to the next scheduled Lead Nurturing agent email.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To edit or reschedule an Agentforce Lead Nurturing email to a prospect:

Use Agentforce SDR App

AND

Sales Engagement User

OR

Sales Engagement Cadence Creator

AND

Ownership of the prospect

OR

Configure Agentforce SDR App

To cancel an Agentforce Lead Nurturing email to a prospect:

Use Agentforce SDR App

AND

Ownership of the prospect

OR

Configure Agentforce SDR App

To deactivate an Agentforce Lead Nurturing agent: Configure Agentforce SDR App

To edit a scheduled email, go to the Activity Timeline for the prospect and choose **Edit** from the Action menu next to the email.

To reschedule a Lead Nurturing agent email, go to the Activity Timeline for the prospect and choose **Change Date** from the Action menu next to the email.

To cancel all Lead Nurturing agent outreach, your manager or Salesforce administrator can deactivate the Lead Nurturing agent in Agent Builder.

Troubleshoot Agentforce Lead Nurturing Email

When an Agentforce Lead Nurturing agent generates and schedules emails, errors can occur under certain conditions. When an error occurs, the agent cancels all outreach to the prospect and an error appears in the prospect's Activity Timeline.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

These email errors in the Activity Timeline include a subject of "Lead Nurturing Email Error". The description provides additional details, including what to do next.

Lead Nurturing email errors in the Activity Timeline include an action to reactivate the agent for the prospect. When you choose this option, the agent begins its outreach from the beginning, without the context of any previous emails.

Here are the errors that can occur, including instructions for resolving them.

Error Description	Cause	Next Steps
An error occurred. Ask your Salesforce admin for help.	Used for rare error conditions that require Salesforce to examine Lead Nurturing log files to determine the exact cause.	Open a support case for further investigation.
We couldn't access the previous email in this thread. Ask your Salesforce admin for help.	Einstein Activity Capture hasn't yet captured the previous email messages to the prospect. The Lead Nurturing agent needs them in order to draft the next message. The agent will re-check EAC for previous messages for up to four hours.	This error is less likely when Activity 360 Reporting is turned off in Einstein Activity Capture Setup.
The [lead/contact/person account]'s email address is blank.	The Email field on the lead, contact, or person account record is blank.	Update the Email field on the lead, contact, or person account record. For leads, if the Lead Nurturing agent Assignment

Error Description	Cause	Next Steps
		Rules are set to assign leads to the agent when leads are created or updated, the agent will automatically try again when the Email field is updated. Otherwise, you can manually reassign the record to the agent.
Previous emails sent to this address have bounced. Update the email address.	One or more previous emails sent to the email address associated with this prospect bounced.	Update the Email field on the lead, contact, or person account record. For leads, if the Lead Nurturing agent Assignment Rules are set to assign leads to the agent when leads are created or updated, the agent will automatically try again when the Email field is updated. Otherwise, you can manually reassign the record to the agent.
This [lead/contact/person account] has been converted to a contact. Send email from the contact record instead.	The lead was manually converted to a contact record. This error appears in the Activity Timeline on the contact record.	Reassign the contact to Agentforce Lead Nurturing.
The [lead/contact/person account] has opted out of emails.	The Email Opt Out field is enabled on the record. If Enforce Email Privacy Settings Preference is turned on in Deliverability Setup, the Email Opt Out field is enabled on the prospect's related Individual record.	None
Your Salesforce admin has turned off Agentforce Lead Nurturing.	Agentforce Lead Nurturing or one of its supporting features is incorrectly configured or turned off in Setup.	Your Salesforce admin can check the Agentforce Lead Nurturing settings in Setup.
The Lead Nurturing agent isn't activated in Agent Builder. Contact your Salesforce admin for help.	The Lead Nurturing agent isn't activated in Agent Builder.	Your Salesforce admin can check the Agentforce Lead Nurturing settings in Setup.
The Lead Nurturing agent user record doesn't have an email account connected.	The Lead Nurturing agent user record doesn't have an email account connected.	Your Salesforce admin can review the Agentforce Lead Nurturing user record and

Error Description	Cause	Next Steps
		connect an email account.
The Lead Nurturing agent's assigned email address is invalid.	The email address on the Lead Nurturing agent user record is invalid. It may have been changed after the email was scheduled and before it was sent.	Your Salesforce admin can update the email address on the Lead Nurturing agent's user record.
The Lead Nurturing agent couldn't access this email. Ask your Salesforce admin for help.	This error can occur when the Lead Nurturing agent has drafted and scheduled an email, but a user manually deleted the draft before it was sent. This error can also happen when the Lead Nurturing agent user doesn't have access to the drafted email record because an admin manually revoked the Lead Nurturing agent user's access.	None
The [lead/contact/person account] owner hasn't accepted the Terms of Service for Email Productivity features.	Lead Nurturing can't access the record owner's calendar to generate a "Book a Meeting" link. This occurs when the user has Inbox permissions, but has not accepted the Terms of Service for the Email Productivity Features (also known as Inbox).	The owner of the record should log in and trigger the email composer by clicking on the email address in a lead or contact record. In the email composer, the user will be prompted to accept the Terms of Service.
The Lead Nurturing agent user hasn't accepted the Terms of Service for Email Productivity features.	The Lead Nurturing agent can't schedule the email message. This occurs when the Lead Nurturing agent user has not accepted the Terms of Service for the Email Productivity Features (also known as Inbox). Note that the terms are accepted automatically when your admin connects the email account to the Lead Nurturing agent user record.	Your Salesforce admin should disconnect the email account from the Lead Nurturing agent user record and then reconnect it. You can do this in the Engagement Rules for the Lead Nurturing agent in Agent Builder.
You've reached the limit of 1800	The Lead Nurturing agent is	Assign the prospect to

Error Description	Cause	Next Steps
daily Lead Nurturing emails sent.	limited to 1800 messages per day. This limit protects Salesforce user email accounts from being flagged as bulk senders (spammers) by Microsoft or Google.	Agentforce Lead Nurturing again the following day. Doing so restarts engagement from scratch, without the context of any previous Lead Nurturing emails to the prospect.
The hourly Lead Nurturing email generation limit has been reached.	Your Salesforce org has reached its hourly limit for use of the LLM. Note that multiple Salesforce services share the same LLM, so Agentforce Lead Nurturing may not be directly responsible for exceeding the limit. After the initial failure, the Lead Nurturing agent retries once per hour for three hours.	None
The [lead/contact/person account]'s email address is on the Excluded Addresses list.	The record that was assigned to the Lead Nurturing agent has an email address or an email domain that appears on the Einstein Activity Capture Excluded Addresses.	None
Your daily record activation limit for Lead Nurturing has been reached. Try again later.	Agentforce Lead Nurturing can be activated on up to 500 records per day. This limit protects Salesforce user email accounts from being flagged as bulk senders (spammers) by Microsoft or Google.	Assign the record to Agentforce Lead Nurturing again the following day.
Your concurrent record activation limit for Lead Nurturing has been reached. Try again later.	Lead Nurturing is limited to being activated on 25000 records at any given time. This limit protects Salesforce user email accounts from being flagged as bulk senders (spammers) by Microsoft or Google.	Assign the record to Agentforce Lead Nurturing again after the agent has completed work on other records.

Reconnect a Lead Nurturing Agent Email Account

Resolve sales agent email connection errors by disconnecting and reconnecting the agent's email account in Agentforce Builder.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To view and configure agents in Agent Builder: Configure Agentforce SDR Agent

1. From Setup, in the Quick Find box, enter *Agentforce*, and then select Agentforce Agents.
2. Click on your agent's name.
3. Click **Open in Builder**
4. Go to the Engagement Rules tab.
5. In the Emails section, click X next to the email account to disconnect the current email.
6. Click **Connect an Account** and follow the prompts on the screen to reconnect the email.

Monitor Lead Nurturing Agent Activity

Lead Nurturing Agent activity metrics are available in the Control Center and in Tableau. Control Center provides essential statistics including Records Assigned, In Progress, Opted Out, Meeting Booked, and more. The Agentforce Analytics Lead Nurturing dashboard takes advantage of Data 360 and Tableau to provide additional metrics and let you dive deeper into the numbers that matter most to your business.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing add-on.

[Monitor Lead Nurturing Agent Activity in Control Center](#)

Track your Lead Nurturing agent's prospect outreach and monitor success in Agent Control Center. See how many leads, contact, or person accounts are assigned to the agent, how many have been emailed, replied, booked a meeting, and more.

[Monitor Lead Nurturing Agent Activity with Agent Analytics \(Beta\)](#)

The Lead Nurturing agent Tableau dashboard helps sales leaders and sales operations managers understand how Agentforce Lead Nurturing is helping to achieve business outcomes, including lead pipeline generation and sales team productivity. The Tableau dashboard provides additional metrics that aren't available in Agentforce Control Center and lets you dive deeper into the numbers to gain insights for your business.

Monitor Lead Nurturing Agent Activity in Control Center

Track your Lead Nurturing agent's prospect outreach and monitor success in Agent Control Center. See how many leads, contact, or person accounts are assigned to the agent, how many have been emailed, replied, booked a meeting, and more.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing add-on.

Agent Control Center appears in a separate tab within the Sales app. It provides several measures so sales teams can assess agent effectiveness.

Records Assigned

The number of records currently assigned to the agent.

First Touch Scheduled

The number of records currently scheduled to receive the initial outreach email.

In Progress

The number of records that have been sent at least one email.

No Response

The number of records that never replied to the agent's emails.

Opted Out

The number of records that opted out of email.

Meeting Booked

The number of records that have booked a meeting.

Replied

The number of records that have replied to an agent email.

Leads Qualified

The number of records that have been rated "hot" by the agent. This number appears only when Qualification is turned on in the agent setup.

Needs Review

The number of agent emails waiting for review by the prospect record owner or their manager. These emails can be edited, approved, or canceled from the list view. This number appears only when Review Before Send is turned on in the agent setup. If Send as Seller is also turned on for

the agent, only the record owner can approve emails sent on their behalf.

Canceled

The number of records manually canceled by a Salesforce user. Canceling agent outreach immediately stops emails from being sent to the prospect.

Errors

The number of records with errors.



Click a metric to display the associated records. Filter by record owner and SDR activation date for a personalized view of the prospects you own.

To cancel Lead Nurturing agent outreach, select prospects from the list and click **Cancel Outreach**.

Monitor Lead Nurturing Agent Activity with Agent Analytics (Beta)

The Lead Nurturing agent Tableau dashboard helps sales leaders and sales operations managers understand how Agentforce Lead Nurturing is helping to achieve business outcomes, including lead pipeline generation and sales team productivity. The Tableau dashboard provides additional metrics that aren't available in Agentforce Control Center and lets you dive deeper into the numbers to gain insights for your business.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing and Data 360 add-ons.



Note The Agentforce SDR name has changed to Agentforce Lead Nurturing. The new name better describes the work the agent does to nurture existing prospects and differentiates it from the Agentforce Lead Generation agent template.

[Set Up the Agent Analytics Lead Nurturing Dashboard \(Beta\)](#)

The Agent Analytics Lead Nurturing dashboard works with your Lead Nurturing agent and Data 360 to provide the key metrics you need to understand and optimize your business. Both Agentforce Lead Nurturing and Data 360 must be enabled in order to set up the dashboard.

[Get Insights with the Agent Analytics Lead Nurturing Dashboard](#)

The Agent Analytics Lead Nurturing dashboard helps you understand how effectively your agent performs and helps you to identify areas you can improve. There are two tabs on the Lead Nurturing dashboard: Overview and Agent Effectiveness.

Set Up the Agent Analytics Lead Nurturing Dashboard (Beta)

The Agent Analytics Lead Nurturing dashboard works with your Lead Nurturing agent and Data 360 to provide the key metrics you need to understand and optimize your business. Both Agentforce Lead Nurturing and Data 360 must be enabled in order to set up the dashboard.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing and Data 360 add-ons.

Setting up the dashboard includes these main steps:

- Configure at least one agent with the Lead Nurturing template. Setup includes creating an agent and assigning permissions to users. For detailed instructions, see [Set Up Agentforce Lead Nurturing](#).
- Assign specific user permissions for Data 360.
- Assign Tableau licenses to users.
- Configure data model objects to enable the dashboard metrics. This includes setting up field mappings from your Salesforce CRM data to the data model objects.
- Turn on the Agentforce Analytics Lead Nurturing dashboard.

[Agent Analytics Lead Nurturing Dashboard Considerations \(Beta\)](#)

Learn about considerations for setting up and using the Agent Analytics Lead Nurturing dashboard.

[Assign Setup Permissions for Agent Analytics](#)

To enable the dashboard, assign specific permissions to Salesforce admins.

[Create Data Streams for Standard Data Model Objects for Agentforce Lead Nurturing \(Beta\)](#)

These include the User, Lead, Opportunity, and Opportunity Stage objects.

[Map Data From CRM Standard Object Sources to Data Model Objects \(Beta\)](#)

For each standard object you connected to Data 360 with a data stream, map the fields from the source object to fields on the Data 360 data model object.

[Create Data Streams for Custom Data Model Objects for Agentforce Lead Nurturing \(Beta\)](#)

These include the Action Cadence, Action Cadence Tracker, Action Cadence Step, and Action Cadence Step Tracker objects.

[Map Data From CRM Custom Object Sources to Data Model Objects \(Beta\)](#)

For each custom object you connected to Data 360 with a data stream, map the fields from the source object to fields on the Data 360 data model object.

[Enable the Agent Analytics Lead Nurturing Dashboard \(Beta\)](#)

When you have set the required data model objects in Data 360, you can turn on the dashboard.

Agent Analytics Lead Nurturing Dashboard Considerations (Beta)

Learn about considerations for setting up and using the Agent Analytics Lead Nurturing dashboard.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing and Data 360 add-ons.

- Only one instance of the Agentforce Lead Nurturing Tableau dashboard can be installed.
- The dashboard app must be installed in the same Data 360 data space where Agentforce Lead Nurturing is configured.

Assign Setup Permissions for Agent Analytics

To enable the dashboard, assign specific permissions to Salesforce admins.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing and Data 360 add-ons.

USER PERMISSIONS NEEDED

To assign user permissions: Manage Users

1. In Setup, enter *Users* in the Quick Find box, and then click **Users**.
2. For each user who needs admin access to perform setup tasks, assign the Data Cloud Admin permission set.

Create Data Streams for Standard Data Model Objects for Agentforce Lead Nurturing (Beta)

These include the User, Lead, Opportunity, and Opportunity Stage objects.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing and Data 360 add-ons.

USER PERMISSIONS NEEDED

To create data model objects in Data 360: Data Cloud Admin

1. From the App Launcher, choose **Data Cloud**.
2. In the Data Cloud app, click the **Data Streams** tab.
3. Click **New**.
4. In the Connected Sources section, click **Salesforce CRM** and then click **Next**.
5. In the Salesforce Object list, select Lead, User, Opportunity, and Opportunity Stage. Click **Next**.
6. Select each object in the list and deselect all fields. Then select these specific fields for each object.

- User
 - - FullName
 - - Username
 - - Id
- Lead
 - - Company
 - - Email
 - - Converted Date
 - - Converted To Opportunity
 - - Created Date
 - - Id
 - - Lead Source
- Opportunity
 - - Id
 - - Opportunity Stage Id
 - - Total Amount
- Opportunity Stage
 - - Id
 - - Api Name
 - - Master Label
 - - Sort Order

7. Click **Next**.
8. On the next screen, choose the default data space. If you have set up your agent in a separate data space, choose that one. The objects you previously selected appear in the Object list.
9. Click **Deploy**. Data 360 creates a data stream for each object, which includes the fields you selected.

Map Data From CRM Standard Object Sources to Data Model Objects (Beta)

For each standard object you connected to Data 360 with a data stream, map the fields from the source object to fields on the Data 360 data model object.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing and Data 360 add-ons.

USER PERMISSIONS NEEDED

To create data model objects in Data 360: Data Cloud Admin

1. On the Data Streams tab in the Data Cloud app, click the **Lead_Home** data stream. The **Lead_Home** detail page opens.
2. In the Data Mapping panel, to begin mapping the object fields, click Start next to the data space you are setting up. In most cases, this is the Default data space.
The **Lead_Home** Mapping page opens.

3. In the Select Objects panel, click the **Standard Data Model** tab.
4. Click **Standard Extended**.
5. In the Object Search field, enter *Lead*. Click the Plus (+) icon next to the Lead object. Click **Done**.
The Lead_Home data map opens.
6. Several mappings are already defined. You need to map additional fields that the dashboard requires.
To add a mapping, first click the source object field in the left column, and then click the data model object field in the right column.
Add or confirm each of these mappings for the Lead object:
 - Company → Company Name
 - Email → Contact Point Email
 - Converted Date → Converted Date
 - Converted Opportunity Id → Converted To Opportunity
 - Created Date → Created Date
 - Lead Id → Lead Id
 - Lead Source → Lead Source
7. Click **Save & Close**.
8. From the Data Streams tab, repeat the field mapping process for the User, Opportunity, and Opportunity Stage objects.
Add or confirm these field mappings for each of the objects:
 - User
 - - Full Name →
 - - Username →
 - - Id →
 - Opportunity
 - - Id →
 - - Opportunity Stage Id →
 - - Total Amount →
 - Opportunity Stage
 - - Id →
 - - Api Name →
 - - Master Label →
 - - Sort Order →

Create Data Streams for Custom Data Model Objects for Agentforce Lead Nurturing (Beta)

These include the Action Cadence, Action Cadence Tracker, Action Cadence Step, and Action Cadence Step Tracker objects.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing and Data 360 add-ons.

USER PERMISSIONS NEEDED

To create data model objects in Data 360: Data Cloud Admin

1. From the App Launcher, choose **Data Cloud**.
2. In the Data Cloud app, click the **Data Streams** tab.
3. Click **New**.
4. In the Connected Sources section, click **Salesforce CRM** and then click **Next**.
5. In the Salesforce Object list, select Action Cadence, Action Cadence Tracker, Action Cadence Step, and Action Cadence Step Tracker. Click **Next**.
6. Select each object in the list and deselect all fields. Then select these specific fields for each object.
 - ActionCadence
 - - Id
 - - Type
 - ActionCadenceTracker
 - - Action Cadence Id
 - - Id
 - - Completion Reason
 - - Created By Id
 - - Created Date
 - - State
 - - Completion Disposition
 - - Target Id
 - ActionCadenceStep
 - - Id
 - - Template Id
 - ActionCadenceStepTracker
 - - Action Cadence Id
 - - Action Cadence Step
 - - Step Title
 - - Id
 - - Action Cadence Tracker Id
 - - Created Date
 - - Scheduled Start DateTime
 - - State
 - - Target Id
7. Click **Next**.
8. On the next screen, choose the default data space. If you have set up your agent in a separate data space, choose that one. The objects you previously selected appear in the Object list.
9. Click **Deploy**. Data 360 creates a data stream for each object, which includes the fields you selected.

Map Data From CRM Custom Object Sources to Data Model Objects (Beta)

For each custom object you connected to Data 360 with a data stream, map the fields from the source object to fields on the Data 360 data model object.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing and Data 360 add-ons.

USER PERMISSIONS NEEDED

To create data model objects in Data 360: Data Cloud Admin

1. On the Data Streams tab in the Data Cloud app, click the **ActionCadence_Home** data stream.
The ActionCadence_Home detail page opens.
2. In the Data Mapping panel, to begin mapping the object fields, click Start next to the data space you are setting up. In most cases, this is the Default data space.
The ActionCadence_Home Mapping page opens.
3. In the Data Model Entities panel, click **Select Objects**.
4. In the Select Objects panel, click the **Custom Data Model** tab.
5. Click **New Custom Object**.
6. On the New Custom Object screen, enter *ActionCadence* for the Object Label. Click **Save**.
The ActionCadence data map opens.
7. Several mappings are already defined. You need to map additional fields that the dashboard requires.
To add a mapping, first click the source object field in the left column, and then click the data model object field in the right column.
Add each of these mappings for the Action Cadence object:
 - Id → Id
 - Type → Type
8. Click **Save & Close**. Then click **Refresh**.
9. From the Data Streams tab, repeat the field mapping process for the Action Cadence Tracker, Action Cadence Step, and Action Cadence Step Tracker objects.
Add or confirm these field mappings for each of the objects:
 - Action Cadence Tracker
 - - Action Cadence Id → Action Cadence Id
 - - Id →
 - - Completion Reason → Completion Reason
 - - Created By Id → Created By Id
 - - Created Date → Created Date
 - - State → State
 - - Completion Disposition → Completion Disposition
 - - Target Id → Target Id
 - Action Cadence Step
 - - Id → Id
 - - Template Id → Template Id
 - Action Cadence Step Tracker
 - - Action Cadence Id → Action Cadence Id
 - - Action Cadence Step → Action Cadence Step
 - - Step Title → Step Title

- - Id → Id
- - Action Cadence Tracker Id → Action Cadence Tracker Id
- - Created Date → Created Date
- - Scheduled Start DateTime → Scheduled Start DateTime
- - State → State
- - Target Id → Target Id

Enable the Agent Analytics Lead Nurturing Dashboard (Beta)

When you have set the required data model objects in Data 360, you can turn on the dashboard.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing and Data 360 add-ons.

USER PERMISSIONS NEEDED

To enable the Agent Analytics Lead Nurturing dashboard:	Data Cloud Admin
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1. In Setup, enter *Agent Analytics* in the Quick Find box, and then click **Agent Analytics (Beta)**.
2. On the Lead Nurturing Agent Analytics row, choose **Install** from the Actions menu.
3. On the Data Space Configuration screen, choose the default data space from the list. Then click **OK**.
A data space is where you define how you want to move data into Data 360 and how the data fields are mapped from the source to the data model objects in Data 360. If you have additional data spaces set up, choose the data space in which you configured Agentforce Lead Nurturing. You can install the Agent Analytics Lead Nurturing dashboard template in only one data space.
4. When installation is complete, you can choose **Manage & Monitor** from the Actions Menu on the Lead Nurturing Agent Analytics row. The App Install History page opens. To see detailed information about the installation tasks that were performed, click the **Lead Nurturing Agent Analytics** app name.
5. Return to the Agent Analytics (Beta) setup page.
6. To view the dashboard, choose **View Agent Analytics** from the Actions menu on the Lead Nurturing Agent Analytics row.
The Lead Nurturing Agent dashboard opens in the Data Cloud Agent Analytics app.

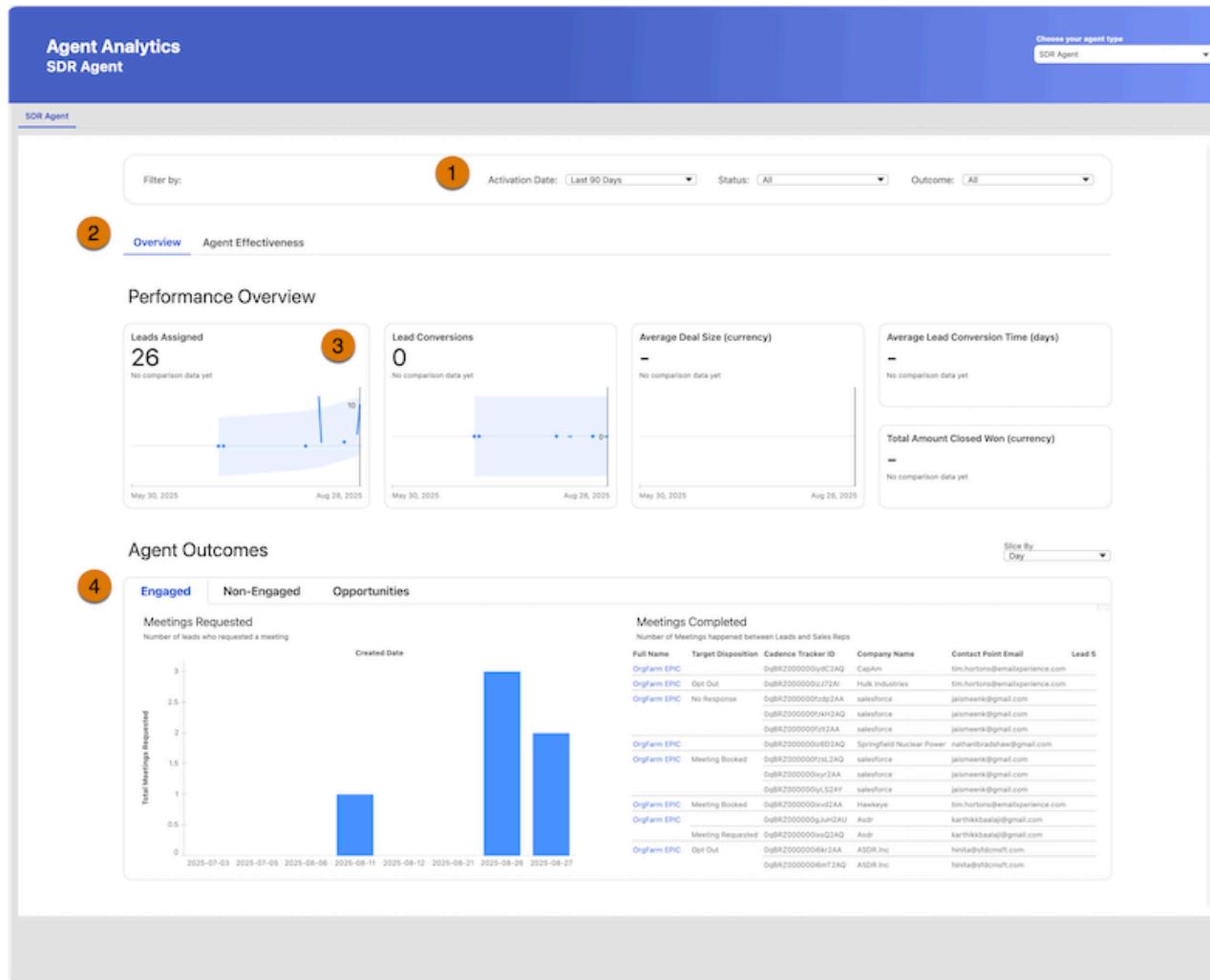
To Uninstall the Lead Nurturing Agent Analytics dashboard app, choose **Uninstall** from the Actions menu on the Lead Nurturing Agent Analytics row.

Get Insights with the Agent Analytics Lead Nurturing Dashboard

The Agent Analytics Lead Nurturing dashboard helps you understand how effectively your agent performs and helps you to identify areas you can improve. There are two tabs on the Lead Nurturing dashboard: Overview and Agent Effectiveness.

Overview Tab

In both tabs, you can filter by activation date, status, and outcome (1). Toggle between the Overview and Agent Effectiveness tabs to get a high-level or detailed view (2), and use the dropdown menu to see more details, such as the associated metrics, sharing the chart to Slack, or modifying the metric (3). In the chart, you can view details for engaged leads, non-engaged leads, and Opportunities (4).



The Overview tab is designed to give you an at-a-glance view of your agent's performance. For example, you can quickly see how many leads were assigned, how many leads were converted to opportunities, and the average deal size. See the following table for a list of KPIs.

KPI	CALCULATION
Lead Assigned	The number of leads assigned via Lead Assignment Rules, which automatically route new leads based on specific criteria like company size.
Lead Conversion	The number of lead records transformed into Account, Contact, and Opportunity records.

KPI	CALCULATION
Average Deal Size (Currency)	This value is calculated by dividing total revenue from closed-won deals by the number of those deals.
Average Lead Conversion Time (Days)	The average time from when a Lead Nurturing agent makes their first contact with a lead to when that lead is converted to an opportunity.
Total Amount Closed Won (Currency)	The number of opportunities where the StageName is "Closed Won" summarized by amount.
Time to First Reply	The time between a prospect's inbound inquiry and the agent's first outbound response.
Engaged Leads	The number of leads that a Lead Nurturing agent is proactively interacting with to qualify and nurture.
Non-Engaged Leads	The number of leads that a Lead Nurturing agent did not engage.
Opportunities	The number of qualified leads converted to opportunities.

Agent Effectiveness Tab

The Agent Effectiveness is designed to give you a more detailed view of your agent's performance so that you can modify settings for a better ROI.

KPI	CALCULATION
Emails Sent	The total number of emails the agent sent to prospects based on rules you configured in Agent Builder
Email Replies from Leads	The total number of email replies from lead prospects.
Email Replies from Agent	The number of automatically drafted responses from the agent containing either a meeting link or a product-related answer.
Lead Reply Rate	Average rate at which leads replied to emails.
Average Time to First Reply	The average time between a prospect's inbound inquiry and the agent's first outbound response.

Customize and Test Agentforce Lead Nurturing

You can customize your Lead Nurturing agent behavior by editing its Agent Builder settings, the included prompt templates, or the Opt Out Lead action.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with the Agentforce Lead Nurturing add-on.

[Lead Nurturing Agent Topics, Actions, and Prompt Templates](#)

To generate appropriate, customized emails, the Agentforce Lead Nurturing agent template includes these agent topics, actions, and prompt templates.

[Testing Lead Nurturing Actions and Email with Agent Builder Preview](#)

When preparing to use Agentforce Lead Nurturing, you can ensure you're satisfied with the agent's work by testing how the agent generates and schedules its emails. When you test in Agent Builder, you can sanity check your agent's topics and actions individually.

[Batch Test Lead Nurturing Actions and Email with Testing Center](#)

Test intro emails, nudges, and replies against multiple records at once using a comma separated values (CSV) spreadsheet file designed for batch testing. Each CSV file can test a single scenario across multiple leads, contacts, or person accounts.

Lead Nurturing Agent Topics, Actions, and Prompt Templates

To generate appropriate, customized emails, the Agentforce Lead Nurturing agent template includes these agent topics, actions, and prompt templates.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and the Agentforce Lead Nurturing add-on.

Agent Topic	Agent Action	Prompt Template
Follow-up Outreach	Get Record Details	None
	Return Calendar Link	None
Generic Response	Get Record Details	None
	Return Calendar Link	None
Initial Outreach	Get Record Details	None
Manage Opt-Out	Opt Out Target	None

Agent Topic	Agent Action	Prompt Template
Meeting Response	Get Record Details	None
	Return Calendar Link	None
Product Q & A	Get Record Details	None
	Answer Questions with Knowledge	Answer Question with Knowledge
	Return Calendar Link	

Legacy Topics and Actions

Lead Nurturing agents created before October 7, 2025 used a different set of topics and actions. When customizing an agent, don't combine older topics and actions with newer versions. Don't use the older topics or actions with a newer agent configuration.

If you do use the legacy topic and action versions of with an agent created after October 7, 2025, be sure to remove the Schedule Email action from the agent's list of topics.

Agent Topic	Agent Action	Prompt Template
Send Outreach	Sales SDR: Draft Initial Outreach Email	Draft Agentforce SDR Email
	Sales SDR: Draft Nudge Email	Follow up Agentforce SDR Email
	Schedule Email	None
	Sales SDR: Draft Initial Outreach Email for Contact or Person Account	Draft Agentforce SDR Email For Contact
Respond to Prospect	Sales SDR: Draft Nudge Email for Contact or Person Account	Follow up Agentforce SDR Email For Contact
	Sales SDR: Draft Meeting Request Email	Reply with Meeting Agentforce SDR Email
	Sales SDR: Draft Meeting Request Email for Contact or Person Account	Reply with meeting Agentforce SDR Email For Contact
	Sales SDR: Draft Generic Reply Email	Reply with fallback response Agentforce SDR Email
	Sales SDR: Draft Generic Reply Email for Contact or Person	Reply with fallback response Agentforce SDR Email For

Agent Topic	Agent Action	Prompt Template
	Account	Contact
	Schedule Email	None
	Sales SDR: Draft Email for Lead Question	Reply with Product QnA Agentforce SDR Email
	Sales SDR: Draft Email for Contact or Person Account Question	Reply with Product QnA Agentforce SDR Email For Contact
	Answer Questions with Knowledge	Answer Question with Knowledge
Manage Opt Out	Opt Out Target	None

Testing Lead Nurturing Actions and Email with Agent Builder Preview

When preparing to use Agentforce Lead Nurturing, you can ensure you're satisfied with the agent's work by testing how the agent generates and schedules its emails. When you test in Agent Builder, you can sanity check your agent's topics and actions individually.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

Agent Builder lets you test how your Lead Nurturing agent generates intro emails, nudges, and replies to prospect emails. For each use case scenario you want to test [intro, nudge, reply], start a new Agent Builder testing session by clicking **Refresh** in the side panel.

In Agent Builder, choose an agent action to test, enter testing scenario values, enter a specific utterance in the chat window, and view the resulting agent email.

[Testing Lead Nurturing Introductory Emails in Agent Builder](#)

To see how your Lead Nurturing agent generates initial emails to prospects using the prospect record details and the Draft Initial Outreach Email prompt template, use the Preview panel in Agent Builder.

[Testing Lead Nurturing Nudge Emails in Agent Builder](#)

To see how your Lead Nurturing agent generates nudge emails to prospects who haven't yet replied, use the Preview panel in Agent Builder. The agent generates nudge emails using the lead, contact, or person account record details and the Draft Nudge Email prompt template.

[Testing Lead Nurturing Reply Emails in Agent Builder](#)

To see how your Lead Nurturing agent generates reply emails to prospects, use the Preview panel in Agent Builder. The agent generates its reply email using the prospect's email response and the Draft Generic Reply Email, Draft Meeting Request Email, Draft Question Answer Email, or Opt Out Lead

prompt templates.

Testing Lead Nurturing Introductory Emails in Agent Builder

To see how your Lead Nurturing agent generates initial emails to prospects using the prospect record details and the Draft Initial Outreach Email prompt template, use the Preview panel in Agent Builder.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To set up Agentforce Lead Nurturing: Configure Agentforce SDR Agent

In Agent Builder, enter testing scenario values, an utterance in the chat window, and view the resulting intro email.

1. In Setup, enter *Agents* in the Quick Find box. Then click **Agents**.
2. In the agent list, click **Einstein Lead Nurturing**.
3. On the Agent Details page, click **Open in Builder**.
4. On the Topics tab, click the **Send Outreach** topic, then click the **This Topic's Actions** tab.
5. Click the **Sales SDR: Draft Initial Outreach Email** action. This is the action you are going to test.
6. Click the **Preview As** button.
7. In the Preview As panel, fill the fields according to what you want to test.
 - a. For Email Scenario, choose **Intro Email**.
 - b. For Record, choose the lead, contact, or person account record you want to test with. This is the prospect the SDR agent will use to customize its email.
 - c. When testing intro emails, leave the Email Body field blank.
 - d. For the Record Owner's Inbox Enabled field, choose whether you want to test as if the record owner has Inbox turned on or not.
 - e. When testing intro emails, leave the Agent's Last Nudge Stage field blank.
8. To close the Preview Conditions panel, click the Back button.
9. In the Chat box, enter one of these utterances, depending on which type of prospect you're testing.
 - *Draft an Initial Outreach Email to a lead. Do not schedule the email. Your response should be a text-formatted email and not JSON.*
 - *Draft an Initial Outreach Email to a contact. Do not schedule the email. Your response should be a text-formatted email and not JSON.*
 - *Draft an Initial Outreach Email to a person account. Do not schedule the email. Your response should be a text-formatted email and not JSON.*

Enter the utterance exactly as written. Because you're only testing email generation, you don't want the agent to send the email.

10. Click **Send**.

The agent generates an introductory email to the prospect using the parameters you entered. Agent Builder shows you the processing performed by the agent while generating the email. Because you aren't actually sending the generated email during testing, an email scheduling error appears. You can ignore this error.

The email subject and body appear in the Output panel of the Sales SDR: Draft Initial Outreach Email action. Check the email to see if it meets your business requirements.

Testing Lead Nurturing Nudge Emails in Agent Builder

To see how your Lead Nurturing agent generates nudge emails to prospects who haven't yet replied, use the Preview panel in Agent Builder. The agent generates nudge emails using the lead, contact, or person account record details and the Draft Nudge Email prompt template.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To set up Agentforce Lead Nurturing:	Configure Agentforce SDR Agent
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In Agent Builder, enter testing scenario values, an utterance in the chat window, and view the resulting nudge email.

1. In Setup, enter *Agents* in the Quick Find box. Then click **Agents**.
2. In the agent list, click **Einstein Sales Development Rep**.
3. On the Agent Details page, click **Open in Builder**.
4. On the Topics tab, click the **Send Outreach** topic, then click the **This Topic's Actions** tab.
5. Click the **Sales SDR: Draft Nudge Email** action. This is the action you are going to test.
6. Click the **Preview As** button.
7. In the Preview As panel, fill the fields according to what you want to test.
 - a. For Email Scenario, choose **Nudge**.
 - b. For Record, choose the prospect record you want to test with. This is the prospect the Lead Nurturing agent will use to customize its email.
 - c. For the Email Body field, enter a sample introductory outreach email or a previous nudge email. The previous email the agent sent to the prospect is used to ground the subsequent nudge emails.
 - d. For the Record Owner's Inbox Enabled field, choose whether you want to test as if the record owner has Inbox turned on or not.
 - e. For the Agent's Last Nudge Stage, choose **True** to test the agent's final nudge to a prospect, or **False** to test earlier nudges to the prospect.
8. To close the Preview Conditions panel, click the Back button.
9. In the Chat box, enter one of these utterances, depending on which type of prospect you're testing.
 - *Draft a Nudge Email to a lead. Do not schedule the email. Your response should be a text-formatted email and not JSON.*

- *Draft a Nudge Email to a contact. Do not schedule the email. Your response should be a text-formatted email and not JSON.*
- *Draft a Nudge Email to a person account. Do not schedule the email. Your response should be a text-formatted email and not JSON.*

Enter the utterance exactly as written. Because you're only testing email generation, you don't want the agent to send the email.

10. Click **Send**.

The agent generates an introductory email to the prospect using the parameters you entered. Agent Builder shows you the processing performed by the agent while generating the email. Because you aren't actually sending the generated email during testing, an email scheduling error appears. You can ignore this error.

The email subject and body appear in the Output panel of the Sales SDR: Draft Nudge Email action. Check the email to see if it meets your business requirements.

Testing Lead Nurturing Reply Emails in Agent Builder

To see how your Lead Nurturing agent generates reply emails to prospects, use the Preview panel in Agent Builder. The agent generates its reply email using the prospect's email response and the Draft Generic Reply Email, Draft Meeting Request Email, Draft Question Answer Email, or Opt Out Lead prompt templates.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To set up Agentforce Lead Nurturing:

Configure Agentforce SDR Agent

AND

Sales Engagement Cadence Creator

AND

Automated Actions User

In Agent Builder, enter testing scenario values, an utterance in the chat window, and view the resulting reply email.

1. In Setup, enter *Agents* in the Quick Find box. Then click **Agents**.

2. In the agent list, click **Einstein Sales Development Rep**.
3. On the Agent Details page, click **Open in Builder**.
4. On the Topics tab, click the **Respond to Prospect** topic, then click the **This Topic's Actions** tab.
5. Click the reply action you want to test. Choose either the Draft Generic Reply Email, Draft Meeting Request Email, Draft Question Answer Email, or Opt Out Lead prompt template.
6. Click the **Preview As** button.
7. In the Preview As panel, fill the fields according to what you want to test.
 - a. For Email Scenario, choose **Reply**.
 - b. For Record, choose the lead, contact, or person account record you want to test with. This is the prospect the SDR agent will use to customize its email.
 - c. For the Email Body field, enter a sample customer reply email such as a product inquiry, a meeting request, an off-topic question, or an email opt-out request. The most recent customer email is used to ground the agent's reply emails.
 - d. For the Record Owner's Inbox Enabled field, choose whether you want to test as if the record owner has Inbox turned on or not.
 - e. When testing reply emails, leave the Agent's Last Nudge Stage field blank.
8. To close the Preview Conditions panel, click the Back button.
9. In the Chat box, enter *Respond to this email. Do not schedule the email. Your response should be a text-formatted email and not JSON.*
Enter this utterance exactly as written. Because you're only testing email generation, you don't want the agent to send the email.
10. Click **Send**.

The agent generates an introductory email to the prospect using the parameters you entered. Agent Builder shows you the processing performed by the agent while generating the email. Because you aren't actually sending the generated email during testing, an email scheduling error appears. You can ignore this error.

The email subject and body appear in the Output panel of the reply action you chose to test. Check the email to see if it meets your business requirements.

Batch Test Lead Nurturing Actions and Email with Testing Center

Test intro emails, nudges, and replies against multiple records at once using a comma separated values (CSV) spreadsheet file designed for batch testing. Each CSV file can test a single scenario across multiple leads, contacts, or person accounts.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

[Batch Test Lead Nurturing Introductory Emails in Testing Center](#)

To see how your Lead Nurturing agent generates initial emails at scale to prospects using the prospect record details and the Draft Initial Outreach Email prompt template action, use Testing Center.

Batch Test Lead Nurturing Nudge Emails in Testing Center

To see how your Lead Nurturing agent generates nudge emails at scale to prospects using the prospect record details and the Draft Nudge Email prompt template action, use Testing Center.

Batch Test Lead Nurturing Reply Emails in Testing Center

To see how your Lead Nurturing agent generates reply emails at scale to prospects using the prospect record details and the Draft Reply Email prompt template action, use Testing Center.

Batch Test Lead Nurturing Introductory Emails in Testing Center

To see how your Lead Nurturing agent generates initial emails at scale to prospects using the prospect record details and the Draft Initial Outreach Email prompt template action, use Testing Center.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To set up and test Agentforce Lead Nurturing: Configure Agentforce SDR Agent

In Testing Center, set test conditions, upload a CSV file, and view the resulting intro emails.

1. In Setup, enter *Testing Center* in the Quick Find box. Then click **Testing Center**.
2. Click **New Test**.
3. Give your test a name and choose the Agentforce Lead Nurturing agent as the agent to test. Add a description for your test if you wish. Click **Next**.
4. On the Test Conditions page, click **Include context variables**. Context variables define the conditions for your testing scenario, such as whether you're testing leads, contacts, or person accounts, intro emails or nudges, etc.
5. From the list of context variables, select the variables needed for your test. Then click **Next**.
For testing intro emails, choose the Record Type, Email Scenario, Action Cadence Step Tracker ID, and Record variables.
6. On the Test Data tab, **Upload Test Cases (.csv)** is selected by default. Use this option to create and upload a CSV file. Click **Template** to download a CSV file containing the columns you'll need for your test. You'll fill in only the columns needed for testing intro emails.
7. Open the template CSV file in a spreadsheet editor like Microsoft Excel or Google Sheets. Delete the placeholder data beginning on row two. Then populate the rows with the lead, contact, or person account records and the associated context values that define your intro email testing scenario. For intro emails, the CSV file includes these columns.
 - Utterance: the request sent to the LLM to initiate drafting the intro email.
 - Expected Topic: the agent topic used to draft the email.
 - Expected Actions: the agent action used to draft the email.
 - Expected Response: the type of response requested from the agent.
 - Context Variable OrchestrationStage: the email testing scenario. In this case the scenario is Intro.

- Context Variable `currentRecordId`: This is a record ID of a lead, contact, or person account you want to test with.
- Context Variable `actionCadenceStepTrackerId`: Your agent uses Sales Engagement Cadences to orchestrate its outreach. This is the ID of the email cadence step tracker associated with the lead, contact or person account record. In Testing Center, use the dummy ID `8HF000000000000`.
- Context Variable `currentObjectApiName`: the name of the object you are testing. Valid values are Lead and Contact. To test with person accounts, use Contact.

Fill the rows of your CSV file according to these guidelines.

Column NAME	Different values Per Row?	Input Value	Details
Utterance	No	Draft an initial outreach email to a lead. Do not schedule the email. Your response should be a text-formatted email and not JSON.	Update to contact or person account if needed.
Expected Topic	No	Send Outreach	
Expected Actions	No	[<code>'DraftInitialOutreachEmail'</code>]	
Expected Response	No	An initial outreach email is successfully drafted.	
Context Variable OrchestrationStage (Email Scenario)	No	Intro	
Context Variable <code>currentRecordId</code>	Yes	A valid record ID	For intro email testing, this is the only column that will contain different values per row. The record ID appears in the URL of the record detail page.
Context Variable <code>actionCadenceStepTrackerId</code>	No	<code>8HF000000000000</code>	This is a dummy value used for testing.
Context Variable <code>currentObjectApiName</code>	No	Lead or Contact	To test person accounts, use Contact.

Here's an example of a valid CSV file for testing intro emails to leads.

8. On the Test Data screen, click **Upload Files**. Choose the CSV file you created and click **Open**. When the upload is complete, click **Done**.
9. On the Evaluations screen, a list of the available output quality evaluations appears. Choose the evaluations you want to see for the generated output. Then click **Save & Run**.
Your new test appears in the Tests list in Testing Center.
10. To run your test, click the test name in the Tests list.

The agent generates an introductory email to each of the prospects using the parameters in your CSV file. The generated output and evaluations appear in the Test Results list. Because you aren't actually sending the generated email during testing, email scheduling errors can appear in the results. You can ignore these errors.

Check the results to see if the generated emails meet your business requirements.

Batch Test Lead Nurturing Nudge Emails in Testing Center

To see how your Lead Nurturing agent generates nudge emails at scale to prospects using the prospect record details and the Draft Nudge Email prompt template action, use Testing Center.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To set up and test Agentforce Lead Nurturing: Configure Agentforce SDR Agent

In Testing Center, set test conditions, upload a CSV file, and view the resulting nudge emails.

1. In Setup, enter *Testing Center* in the Quick Find box. Then click **Testing Center**.
2. Click **New Test**.
3. Give your test a name and choose the Agentforce Sales Development Rep agent as the agent to test. Add a description for your test if you wish. Click **Next**.
4. On the Test Conditions page, click **Include context variables**. Context variables define the conditions for your testing scenario, such as whether you're testing leads, contacts, or person accounts, intro emails or nudges, etc.
5. From the list of context variables, select the variables needed for your test. Then click **Next**.
For testing nudge emails, choose the Record Type, Email Scenario, Action Cadence Step Tracker ID, Record, Email Body, and Test as Last Nudge variables.
6. On the Test Data tab, **Upload Test Cases (.csv)** is selected by default. Use this option to create and upload a CSV file. Click **Template** to download a CSV file containing the columns you'll need for your test. You'll fill in only the columns needed for testing nudge emails.
7. Open the template CSV file in a spreadsheet editor like Microsoft Excel or Google Sheets. Delete the placeholder data beginning on row two. Then populate the rows with the lead, contact, or person account records and the associated context values that define your nudge email testing scenario. For

nudge emails, the CSV file includes these columns.

- Utterance: the request sent to the LLM to initiate drafting the nudge email.
- Expected Topic: the agent topic used to draft the email.
- Expected Actions: the agent action used to draft the email.
- Expected Response: the type of response requested from the agent.
- Context Variable OrchestrationStage: the email testing scenario. In this case the scenario is Nudge.
- Context Variable currentRecordId: This is a record ID of a lead, contact, or person account you want to test with.
- Context Variable actionCadenceStepTrackerId: Your agent uses Sales Engagement Cadences to orchestrate its outreach. This is the ID of the email cadence step tracker associated with the lead, contact or person account record. In Testing Center, use the dummy ID `8HF000000000000`.
- Context Variable currentObjectApiName: the name of the object you are testing. Valid values are Lead and Contact. To test with person accounts, use Contact.
- Context Variable emailBody: The body of the previous email sent by the agent to the prospect. This can be an actual agent-generated email, or other email content you want to test with.
- Context Variable testAsLastNudge: tells the LLM whether to treat this nudge as the last outreach that will be sent. Valid values are True or False.

Fill the rows of your CSV file according to these guidelines.

Column NAME	Different Values Per Row?	Input Value	Details
Utterance	No	Draft a nudge email to a lead. Do not schedule the email. Your response should be a text-formatted email and not JSON.	Update to contact or person account if needed.
Expected Topic	No	Send Outreach	
Expected Actions	No	['DraftNudgeEmail']	
Expected Response	No	A nudge email is successfully drafted.	
Context Variable OrchestrationStage (Email Scenario)	No	Nudge	
Context Variable currentRecordId	Yes	A valid record ID	For nudge email testing, this is the only column that will contain different values per row. The record ID appears in the URL of the record detail page.

Column NAME	Different Values Per Row?	Input Value	Details
Context Variable actionCadenceStepTrackerId	No	8HF0000000000000	This is a dummy value used for testing.
Context Variable currentObjectName	No	Lead or Contact	To test person accounts, use Contact.
Context Variable emailBody	Yes	The body of the previous email sent by the agent to the prospect.	This can be actual agent-generated content, or other email content you want to test against.
Context Variable Is_Agent_at_Last_Nudge	Yes	True	Can be True or False

Here's an example of a valid CSV file for testing nudge emails to leads.

8. On the Test Data screen, click **Upload Files**. Choose the CSV file you created and click **Open**. When the upload is complete, click **Done**.
9. On the Evaluations screen, a list of the available output quality evaluations appears. Choose the evaluations you want to see for the generated output. Then click **Save & Run**. Your new test appears in the Tests list in Testing Center.
10. To run your test, click the test name in the Tests list.

The agent generates a nudge email to each of the prospects using the parameters in your CSV file. The generated output and evaluations appear in the Test Results list. Because you aren't actually sending the generated email during testing, email scheduling errors can appear in the results. You can ignore these errors.

Check the results to see if the generated emails meet your business requirements.

Batch Test Lead Nurturing Reply Emails in Testing Center

To see how your Lead Nurturing agent generates reply emails at scale to prospects using the prospect record details and the Draft Reply Email prompt template action, use Testing Center.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** editions with Sales Cloud and Einstein for Sales.

USER PERMISSIONS NEEDED

To set up and test Agentforce Lead Nurturing: Configure Agentforce SDR Agent

In Testing Center, set test conditions, upload a CSV file, and view the resulting reply emails.

1. In Setup, enter *Testing Center* in the Quick Find box. Then click **Testing Center**.
2. Click **New Test**.
3. Give your test a name and choose the Agentforce Sales Development Rep agent as the agent to test. Add a description for your test if you wish. Click **Next**.
4. On the Test Conditions page, click **Include context variables**. Context variables define the conditions for your testing scenario, such as whether you're testing leads, contacts, or person accounts, intro emails or replies, etc.
5. From the list of context variables, select the variables needed for your test. Then click **Next**.
For testing reply emails, choose the Record Type, Email Scenario, Action Cadence Step Tracker ID, Record, Email Body, and Lead Owner's Inbox Enabled variables.
6. On the Test Data tab, **Upload Test Cases (.csv)** is selected by default. Use this option to create and upload a CSV file. Click **Template** to download a CSV file containing the columns you'll need for your test. You'll fill in only the columns needed for testing reply emails.
7. Open the template CSV file in a spreadsheet editor like Microsoft Excel or Google Sheets. Delete the placeholder data beginning on row two. Then populate the rows with the lead, contact, or person account records and the associated context values that define your nudge email testing scenario. For nudge emails, the CSV file includes these columns.
 - Utterance: the request sent to the LLM to initiate drafting the reply email.
 - Expected Topic: the agent topic used to draft the email.
 - Expected Actions: the agent action used to draft the email.
 - Expected Response: the type of response requested from the agent.
 - Context Variable OrchestrationStage: the email testing scenario. In this case the scenario is Nudge.
 - Context Variable currentRecordId: This is a record ID of a lead, contact, or person account you want to test with.
 - Context Variable actionCadenceStepTrackerId: Your agent uses Sales Engagement Cadences to orchestrate its outreach. This is the ID of the email cadence step tracker associated with the lead, contact or person account record. In Testing Center, use the dummy ID *8HF000000000000*.
 - Context Variable currentObjectName: the name of the object you are testing. Valid values are Lead and Contact. To test with person accounts, use Contact.
 - Context Variable emailBody: the body of the prospect email to which the agent is replying.
 - Context Variable Lead_Owner_has_Inbox: indicates whether the record owner has Inbox enabled. To allow your agent to include a meeting booking link in a reply, Inbox must be enabled for the record owner. Valid values are *True* and *False*.

Fill the rows of your CSV file according to these guidelines.

Column NAME	Different Values Per Row?	Input Value	Details
Utterance	No	Respond to this email.	

Column NAME	Different Values Per Row?	Input Value	Details
		Do not schedule the email. Your response should be a text-formatted email and not JSON.	
Expected Topic	No	Respond to Prospect	
Expected Actions	Yes	<ul style="list-style-type: none"> ['AnswerQuestionsWithKnowledge', 'DraftQuestionAnswerEmail'] 	<p>This value will change based on the emailBody.</p> <p>If emailBody contains a product inquiry, use <code>['AnswerQuestionsWithKnowledge', 'DraftQuestionAnswerEmail']</code></p> <p>If emailBody contains a meeting request only, use <code>['DraftMeetingRequestEmail']</code></p> <p>If emailBody contains an off-topic question only, use <code>['DraftGenericReplyEmail']</code></p>
Expected Response	No	A reply email is successfully drafted.	
Context Variable OrchestrationStage (Email Scenario)	No	Reply	
Context Variable currentRecordId	Yes	A valid record ID	For nudge email testing, this is the only column that will contain different values per row. The record ID appears in the URL of

Column NAME	Different Values Per Row?	Input Value	Details
			the record detail page.
Context Variable actionCadenceStepTrac kerId	No	8HF0000000000000	This is a dummy value used for testing.
Context Variable currentObjectApiName	No	Lead or Contact	To test person accounts, use Contact.
Context Variable emailBody	Yes	What products do you offer?	There are three types of SDR Email Body utterances for replies, product inquiry, meeting request, and off-topic question.
Context Variable Lead_Owner_has_Inbo x	Yes	True	Can be True or False

Here's an example of a valid CSV file for testing reply emails to leads.

8. On the Test Data screen, click **Upload Files**. Choose the CSV file you created and click **Open**. When the upload is complete, click **Done**.
9. On the Evaluations screen, a list of the available output quality evaluations appears. Choose the evaluations you want to see for the generated output. Then click **Save & Run**. Your new test appears in the Tests list in Testing Center.
10. To run your test, click the test name in the Tests list.

The agent generates a reply email to each of the prospects using the parameters in your CSV file. The generated output and evaluations appear in the Test Results list. Because you aren't actually sending the generated email during testing, email scheduling errors can appear in the results. You can ignore these errors.

Check the results to see if the generated emails meet your business requirements.

Agentforce Sales Management

Support sales teams through every step of the sales process with the help of generative AI. Automate time-consuming tasks such as record updates, get timely and data-informed suggestions, and more with the help of a Sales Management agent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited Editions** with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Industry add-on to access the actions.

Considerations for Agentforce Sales Management

To use Agentforce Sales Management, consider the supported functionality, usage, limitations, allowances, limits, and other issues.

Agentforce Pipeline Management

Free up valuable time for your sales team and boost seller productivity with the help of generative AI. When you turn on Agentforce Pipeline Management, the Sales Management agent analyzes data sources, such as recent notes, emails, and voice and video calls, to offer actionable suggestions for managing sellers' opportunities. With recommendations to update opportunity fields, follow up on emails, and send meeting requests, sales reps can move deals forward with just a few clicks.

Agentforce Account Management

Use Agentforce Account Management to conduct deep research on accounts, build strategic positioning statements, and prepare for meetings. Create comprehensive briefings with company demographics, business priorities, key performance indicators (KPIs), industry trends, and more to anchor your entire sales strategy. When you save time with Agentforce Account Management, you can focus more on what really matters: building strong relationships with customers.

Considerations for Agentforce Sales Management

To use Agentforce Sales Management, consider the supported functionality, usage, limitations, allowances, limits, and other issues.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited Editions** with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Industry add-on to access the actions.

Agentforce Sales Management Language and Locale Support

Agentforce Sales Management supports the languages and locales supported by the [Agentforce Employee Agent](#) type. All languages except English are supported only in Beta.

Automated suggestions and updates show in the language selected for the agent user. Agent responses within the Agentforce Panel show in the language set by the user in their user profile. Suggestions,

updates, and agent responses in the Agentforce panel show in English if the selected language isn't supported.

Agentforce Sales Management Large Language Model Support

Agentforce Sales Management supports these models.

Model
OpenAI GPT-4o mini

You can customize your AI experience by bringing in your own models to Salesforce. For more information, see [Large Language Model Support](#).

Einstein Trust Layer Service Support

Agentforce Sales Management supports the Trust Layer services supported by the [Agentforce Employee Agent](#) type.

Usage Types Billed by Agentforce Sales Management

Agentforce Sales Management uses generative AI and Data 360 to ingest, store, and process data. You're billed in these categories when you use Agentforce Sales Management. Before deployment, work with your Salesforce account team to confirm license availability and plan credit usage.

 **Tip** This feature has access to Digital Wallet, a free account management tool that offers near real-time consumption data for enabled products across your active contracts. Access Digital Wallet and start tracking your org's usage. To learn more, see [About Digital Wallet](#).

Agentforce Sales Management includes multiple features. Consumption billing can vary by feature.

Consumption Billing by Feature

Feature	Consumption Billing Type
Agentforce Pipeline Management	For orgs with an Agentforce for Sales, Service, or Industry add-on license, or orgs with Agentforce 1 Edition for Sales, Service, or Industry, this feature will not draw down credits where Customer makes less than 100 LLM gateway calls daily for each licensed Agentforce user. The 100 LLM gateway call limit is averaged across the entire org and doesn't apply to each individual user. For example: 100 LLM gateway calls per day * 10 users = 1000 cumulative LLM call limit per day. If total usage

Feature	Consumption Billing Type
	exceeds this limit, Salesforce reserves the right to apply Flex Credits towards the excess at the then-current multiplier. For more information on generative AI credit consumption, see Metering for Agentforce and Generative AI Usage . Credits can still be consumed by data services in Data 360 and other related usage.
Agentforce Account Management	Usage of this feature is either metered or unmetered, depending on the permissions assigned to the interacting user. Unmetered usage applies if a user has the Unmetered User-Based AI permission.
Agentforce Sales Management in Slack	Usage of this feature is either metered or unmetered, depending on the permissions assigned to the interacting user. Unmetered usage applies if a user has the Unmetered User-Based AI permission.

These are the usage types that can be billed when usage is metered.

Usage Types for Metered Usage

Digital Wallet Card	Usage Type	Description	Notes
Flex Credits	Standard Action	Usage is determined by the number of standard actions executed by the agent in a text conversation. Each standard agent action includes the processing of up to 10,000 tokens. Tokens are units of data processed by AI models. Actions exceeding this limit are counted as a separate standard action each time the 10,000 token limit is exceeded. For example, processing 20,001 tokens is 3 standard actions. Actions involving lengthy prompts sent	This usage type isn't billed when it's associated with a generative AI action that qualifies as unmetered human context usage. For more information, see Metering for Agentforce and Generative AI Usage .

Digital Wallet Card	Usage Type	Description	Notes
		<p>to the LLM can be counted as multiple actions where the 10,000 tokens per action limit is exceeded.</p> <p>Standard agent actions are actions that are available out-of-the-box. To check the list of Standard actions, see Standard Action Reference.</p> <p> Note Use of some standard agent actions require that a subscription has been purchased for each user that accesses these actions, such as a subscription to Agentforce for Sales Add-on or Agentforce for Service Add-on. To determine which subscription is required for such standard actions, see Standard Action Reference at Standard Action Reference. While this requirement is not technically enforced yet, users who don't have the required add-on license will lose access to such actions for which they don't have a license when the requirement is enforced.</p>	
Flex Credits	Custom Action	Usage is determined by the number of custom actions executed by the agent in a text conversations. Each custom action includes the processing of up to 10,000 tokens. Tokens are	This usage type isn't billed when it's associated with a generative AI action that qualifies as unmetered human context usage. For more information, see Metering for Agentforce and Generative AI Usage .

Digital Wallet Card	Usage Type	Description	Notes
		<p>units of data processed by AI models. Actions exceeding this limit are counted as a new custom action each time the 10,000 token limit is exceeded. For example, processing 20,001 tokens is 3 custom actions.</p> <p>Actions involving lengthy prompts sent to the LLM can be counted as multiple actions where the 10,000 token action per limit is exceeded.</p> <p>Custom actions are actions that are created by you or which result from your modification of a standard action. To learn more about what customer created actions are, see Create a Custom Agent Action. To learn more about how standard actions become custom actions, see Editing Standard Agent Action Reference Actions.</p>	
Flex Credits	Starter Prompts	<p>Usage is calculated based on two factors: the number of direct requests to the LLM via the LLM gateway, and whether the gateway uses a Bring Your Own Large Language Model (BYOLLM).</p> <p>Each starter prompt includes the processing of up to 2,000 tokens. Prompt usage is counted in chunks of 2,000 tokens, rounded up. Prompts that exceed this limit will be metered as multiple prompts, with each additional 2,000-token chunk</p>	This usage type isn't billed when it's associated with a generative AI action that qualifies as unmetered human context usage. For more information, see Metering for Agentforce and Generative AI Usage .

Digital Wallet Card	Usage Type	Description	Notes
		<p>counting as a new prompt. For example, a prompt with a total of 6,500 input and output tokens will be metered as 4 prompts.</p> <p>Tokens are units of data processed by the AI models.</p>	
Flex Credits	Standard Prompts Basic Prompts Advanced Prompts	<p>Usage is calculated based on two factors: the number of direct requests to the LLM via the LLM gateway, and whether the gateway uses a Salesforce managed large language model. The specific category depends on the model that is used. See Large Language Model Support to find out which usage types apply.</p> <p>All Standard, Basic, and Advanced prompts process up to 2,000 tokens per prompt. Token usage is rounded up in 2,000-token increments. All Standard, Basic, and Advanced prompts that exceed this limit will be metered as multiple prompts, with each additional 2,000-token chunk counting as a new prompt. For example, a prompt with a total of 6,500 input and output tokens will be metered as 4 prompts.</p> <p>Tokens are units of data processed by the AI models.</p>	<p>This usage type isn't billed when it's associated with a generative AI action that qualifies as unmetered human context usage. For more information, see Metering for Agentforce and Generative AI Usage.</p>

Data Cloud One Support

Agentforce Sales Management is not supported in Data Cloud One companion orgs.

Other Considerations

We recommend that you create only one Sales Management agent per Salesforce org.

See Also

[About Einstein Generative AI](#)

[Considerations for Agentforce Employee Agent](#)

[Considerations for Unmetered Agentforce Usage](#)

Agentforce Pipeline Management

Free up valuable time for your sales team and boost seller productivity with the help of generative AI. When you turn on Agentforce Pipeline Management, the Sales Management agent analyzes data sources, such as recent notes, emails, and voice and video calls, to offer actionable suggestions for managing sellers' opportunities. With recommendations to update opportunity fields, follow up on emails, and send meeting requests, sales reps can move deals forward with just a few clicks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited** editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

[Considerations for Agentforce Pipeline Management](#)

Before you use Agentforce Pipeline Management, keep these considerations in mind.

[Agentforce Pipeline Management Overview](#)

Learn how Agentforce Pipeline Management can help sales teams free up bandwidth for bigger tasks by providing actionable, timely suggestions for managing opportunities.

[Agentforce Pipeline Management Permissions](#)

You use permission set groups to assign permissions.

[Set Up Agentforce Pipeline Management](#)

Set up Agentforce Pipeline Management to save your sales team time and effort. Configure the required features and assign permissions. Optimize the experience by customizing flows and configuring more data sources and features.

[Customize Agentforce Pipeline Management](#)

Bring in your own data sources to Agentforce Pipeline Management, and get field update suggestions

for custom opportunity fields or standard opportunity fields.

Considerations for Agentforce Pipeline Management

Before you use Agentforce Pipeline Management, keep these considerations in mind.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited** editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

Consumption Billing

For orgs with an Agentforce for Sales, Service, or Industry add-on license, or orgs with Agentforce 1 Edition for Sales, Service, or Industry, this feature will not draw down credits where Customer makes less than 100 LLM gateway calls daily for each licensed Agentforce user. The 100 LLM gateway call limit is averaged across the entire org and doesn't apply to each individual user. For example: 100 LLM gateway calls per day * 10 users = 1000 cumulative LLM call limit per day. If total usage exceeds this limit, Salesforce reserves the right to apply Flex Credits towards the excess at the then-current multiplier. For more information on generative AI credit consumption, see [Metering for Agentforce and Generative AI Usage](#). Credits can still be consumed by data services in Data 360 and other related usage.

Agent Suggestions

- The daily limit for field update suggestions is 8,000 large language model generation requests. Using the standard Recommend Next Step for Opportunity and Recommend Stage for Opportunity prompt templates, Agentforce Pipeline Management can process up to 4,000 opportunities daily.
- The agent's suggestions aren't visible after 30 days.
- Metrics for opportunity field updates aren't tracked in the Employee Agent Analytics dashboard.

Data Sources

- The suggestions and field updates that a user can view depends on their access to the data sources used to generate them.
- The more detailed the information from a data source, the more specific the agent's suggestions can be.
- The agent filters for notes created within the past 7 days. Then, it uses the most recently created note or updated in the past 24 hours to inform its suggestions.
- When Einstein Conversation Insights is enabled as a data source, the agent uses the most recent video or voice call from the past 24 hours that's at least 5 minutes long to inform its suggestions.

- When emails are enabled as a data source, the agent evaluates the 50 most recent emails from the past 24 hours to inform its suggestions.

Process Field Update Suggestions Flow

- The Process Field Update Suggestions flow runs only when a Sales Management agent is active.
- The flow includes all open opportunities with a close date within 90 days. To improve relevance, define specific filter conditions to pinpoint the opportunities to include in the agent's work.
- Within the flow, the agent is added as an opportunity team member for each opportunity it works on. If you have custom Apex triggers that are set to run an action when an opportunity team member is created, determine if you want the actions to fire when the agent is added as an opportunity team member.
- The agent has Read and Write access for the opportunities that it's working on. If you restrict the agent's access to Read Only, it can't generate field update suggestions.
- If you want to use the flow for a custom agent, edit the Get Sales Management Agent Bot Record and the Get Sales Management Agent Bot Version elements to reference the details of the agent that you want to use, instead of the Sales Management agent.
- When the standard prompt templates are called within the Process Field Update Suggestions flow and there's no relevant email, call, or note data to generate suggestions, no further processing occurs. When the standard prompt templates are called outside of the flow, such as through Prompt Builder or the Agentforce panel, processing occurs regardless of available data.
- You can't clone or modify the Recommend Stage for Opportunity prompt template. Edit the opportunity stage descriptions used by the prompt template through the Pipeline Management section of the Agentforce for Sales page in Salesforce Go.

See Also

[Guidelines for Using Sync Email as Salesforce Activity](#)

[Flow Limits and Considerations](#)

Agentforce Pipeline Management Overview

Learn how Agentforce Pipeline Management can help sales teams free up bandwidth for bigger tasks by providing actionable, timely suggestions for managing opportunities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited** editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

With Agentforce Pipeline Management, the Sales Management agent reviews recent notes, calls, or emails to provide suggested actions to take on your opportunities.

You can view the agent's pipeline management suggestions in Pipeline Inspection. Quickly take action from the status in the Agent Activity column (1) or review the suggestions in more detail in the side panel (2).

The screenshot shows the Agentforce Sales Management platform. At the top, there's a navigation bar with icons for Sales, Home, Tableau Insights, Accounts, Contacts, Leads, Opportunities (selected), Dashboards, Reports, and a settings gear. Below the navigation is a search bar and a toolbar with various icons.

The main area is titled "Opportunities My Pipeline". It displays a summary: Open Pipeline (\$2.4M), New (\$0), Won (\$2.9M), Increased (\$0), and Other Metrics (+5). There are tabs for Inspection (selected), Chart, Close Date (This Month), Show More (+2), and a filter for "Add to an Actionable List".

The list of opportunities includes:

- 19 Omega, Inc. - New Business - 128K
- 20 Optos Inc. - Add-On Business - 23K (highlighted)
- 21 Permadyne - Add
- 22 Red Studio Design
- 23 Red Studio Design
- 24 Roseburg Product
- 25 Tech Labs - Add
- 26 Towson Inc. - Add
- 27 Towson Inc. - Services - 55K

For opportunity 20 (Optos Inc.), a modal window is open with the title "Update Stage". It shows the current stage is "Discovery" and the target stage is "Qualification". The date is set to 1/6/2026. The rationale states: "The opportunity should move to Qualification as the meeting identified pain points and decision criteria. The next steps involve assessing suitability, aligning needs with solutions, and confirming budget authority." There are buttons for "+: Update", "Edit", and "Decline".

The side panel for "Optos Inc. - Add-On Business - 23K" has tabs for Insights, Agent Activity (selected), and Activity. Under "Agent Activity", it shows a section for "For Review" with 2 items, both of which have "Action Taken: None". It also lists "Agentforce 01/06/2026" under "Update Stage" and "Sources (1)" with "Optos Inc".

Accept, decline, or edit a suggestion from the side panel. You can also view the rationale and sources used, so you can be confident that it's grounded in relevant data about the opportunity.

Optos Inc. - Add-On Business - 23K X

Insights Agent Activity Activity

For Review

2

Action Taken

None

Agentforce 01/06/2026 ◆

▼ Update Stage
Discovery to Qualification

Rationale: The opportunity should move to Qualification as the meeting identified pain points and decision criteria. The next steps involve assessing suitability, aligning needs with solutions, and confirming budget authority.

+ Update Edit Decline

▼ Sources (1) 1 Optos Inc 1 Like 1 Dislike

To get Pipeline Management notifications about your opportunities directly in your flow of work, you can also [add the Sales Management agent to Slack](#).

The screenshot shows a message from the "Sales Management" app. The message is as follows:

Sales Management APP 31 minutes ago
Hi there
There's an update for your opportunity **Suggest Field Update: Opportunity NextStep**
Opportunity Record: Acme - 2000 Widgets
Field to Update: NextStep
Current Value: Need estimate
Suggested New Value: Conduct P&L analysis and prepare cash flow projections to advance the opportunity.
Rationale for Suggestion: The next step involves completing the P&L analysis and cash flow projections as noted in the content. This is essential to progress the opportunity.
Action Required: Would you like to update the **NextStep** field to Conduct P&L analysis and prepare cash flow projections to advance the opportunity?
Sources:
[1]: In order to get to the next stage, we need to P&L analysis. We also need cash flow projections.
[See less](#)

At the bottom, there are two buttons: **Accept** and **Dismiss**.

Below the message, there is a rich text editor toolbar with icons for bold, italic, underline, etc. Below the toolbar is a text input field labeled "Reply..." and a set of quick reply icons.

Agentforce Pipeline Management Permissions

You use permission set groups to assign permissions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited** editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

User Permission Set Group

The Sales Management User permission set group includes the Use Agentforce Pipeline Management

permission set. When you set up Agentforce Pipeline Management, this permission set group is automatically assigned to you, the admin. Assign this permission set group to users who use Agentforce Pipeline Management.

Agent Permission Set Group

The Sales Management Agent User permission set group includes the Pipeline Management Agent Autonomous User and Sales Management Agent Autonomous User View All Calls permission sets. These permission sets allow the agent to perform its work. This permission set group is only for the automated agent user record and is automatically assigned to the agent.

Other Permissions

The Unmetered User Based AI permission grants unmetered usage for users interacting with an AI feature or agent under certain conditions. Assign this permission to both the agent and any users who interact with the feature. If a user isn't assigned this permission, their AI activity is metered and can incur charges. See [Metering for Agentforce and Generative AI Usage](#) and [Configure Unmetered User Based AI Permissions](#).

The Data Cloud User permission set grants view access to Data 360. Assign it to yourself and the relevant users if you're customizing your agent by using [Agentforce Data Library](#).

See Also

[Manage Permission Set Assignments](#)

Set Up Agentforce Pipeline Management

Set up Agentforce Pipeline Management to save your sales team time and effort. Configure the required features and assign permissions. Optimize the experience by customizing flows and configuring more data sources and features.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited** editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

USER PERMISSIONS NEEDED

To set up Agentforce Pipeline Management:

[View Setup](#)

USER PERMISSIONS NEEDED

AND

Modify All Data

OR

Customize Application

To configure a Sales Management agent:

Manage AI Agents

AND

Manage Agentforce Employee Agents

OR

Customize Application

To manage permission set assignments:

Assign Permission Sets

Turn On Agentforce Pipeline Management

Turn on the features required to use Agentforce Pipeline Management.

Before you begin, set up [Einstein Generative AI](#) and enable [Agentforce](#).

1. From the gear icon, select **Salesforce Go**.
2. On the Salesforce Go Home page, search for and select **Agentforce for Sales**.
3. Turn on Agentforce.
4. Turn on Pipeline Management.

When you turn on Pipeline Management, you're assigned the Sales Management User permission set group. The Sales Management agent is also created and assigned the Sales Management Agent User permission set group.

Now that Pipeline Management is on, you can get field update suggestions based on notes. Complete the additional configuration steps for richer agent recommendations.

Add Features to Agentforce Pipeline Management

Certain agent capabilities, such as providing post-meeting suggestions and drafting follow-up emails and meeting requests, require you to turn on more features or configure settings. To get the most out of Agentforce Pipeline Management, complete these steps.

1. Customize the provided pipeline management flows.

For example, integrate custom data sources by modifying the Get Opportunity Grounding Data flow.

See [Automate Tasks with Flows](#).

2. Set up Einstein Conversation Insights.

Einstein Conversation Insights enables the agent to use voice and video calls as data sources for suggestions. Access to this data improves the relevance and quality of the agent's responses. Einstein Conversation Insights is required for post-meeting suggestions.

See [Set Up Einstein Conversation Insights](#).

3. Set up Einstein Activity Capture.

Einstein Activity Capture enables the agent to use captured emails as a data source for suggestions. Access to this data improves the relevance and quality of the agent's responses.

See [Set Up Einstein Activity Capture](#).

4. Set up Inbox.

Inbox enables the agent to draft follow-up emails and meeting requests for sellers to review and send.

See [Set Up Inbox](#).

5. Define opportunity stages.

The agent uses your opportunity stage descriptions to suggest updates to the Stage field. If you use standard opportunity stages, review the descriptions to confirm that they align with your team's sales processes and definitions. If you use custom opportunity stages, add detailed descriptions to help the agent suggest the correct stage for an opportunity.

See [Customize Opportunity Stages](#).

6. To allow the agent to make updates to opportunity fields on a user's behalf, turn on autonomous opportunity field updates.

Turn off this setting if you want the agent to provide only opportunity field update suggestions for the user to review.

7. Configure the Slack connection.

If your organization uses Slack, we created the Agentforce connection for you. To see pipeline management suggestions in Slack, complete the setup by adding the agent and managing your configuration.

See [Set up and manage Agentforce in Slack](#).

Grant Users Access to Agentforce Pipeline Management

To give users access to Agentforce Pipeline Management, assign them the Sales Management User permission set group. Additionally, give them permission to access and use the Sales Management agent through a custom permission set.

1. In Salesforce Go, on the Agentforce Sales page, locate the Pipeline Management section.
2. Go to the Manage User Access step and click **Manage**.
3. Assign the Sales Management User permission set group to the users who need access to Agentforce Pipeline Management.
4. [Create a custom permission set](#) to grant users access to the Sales Management agent.
5. After assigning the permission set to users, [add it to the list](#) of permission sets with access to the agent.

What's Next

Now that you've set up Pipeline Management, your sales reps can get timely, data-informed suggestions to keep moving deals forward. Here are a few suggestions for what to do next.

- [Review and test your agent's configuration](#). Update the agent's company description in Agentforce Builder to be more specific to your organization.
- [Configure a data library](#) to improve the agent's responsiveness.

See Also

[Discover and Set Up Features with Salesforce Go](#)

[Set Up Your Agent](#)

[Agentforce Pipeline Management Permissions](#)

Customize Agentforce Pipeline Management

Bring in your own data sources to Agentforce Pipeline Management, and get field update suggestions for custom opportunity fields or standard opportunity fields.

[Agentforce Pipeline Management Components](#)

Before you customize Agentforce Pipeline Management, make sure that you understand the different pieces that make it work.

[Get Field Update Suggestions for Other Opportunity Fields](#)

Agentforce Pipeline Management generates field update suggestions for the Next Step and Stage fields. You can also add other standard opportunity fields or custom fields.

[Add Data Sources to Enrich Field Update Suggestions in Agentforce Pipeline Management](#)

Agentforce Pipeline Management can use notes, emails, or calls to inform the agent's field update suggestions. You can customize and expand the data sources that your agent uses. For example, use other opportunity fields or different sources, such as content from other objects.

Agentforce Pipeline Management Components

Before you customize Agentforce Pipeline Management, make sure that you understand the different pieces that make it work.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited** editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

Topics and Actions

Topics and actions determine what your agent can do and guide your agent interactions in the Agentforce panel. [Add these standard topics and actions](#) to your Sales Management agent. To limit the agent to a certain job, add only the topics and actions that correspond to that job.

Job	topic	actions
Opportunity Field Updates	Field Update Suggestions	<ul style="list-style-type: none"> Identify Record by Object Identify Record by Name Get Record Details Suggest Next Step for Opportunity Suggest Stage for Opportunity
	Record Management	<ul style="list-style-type: none"> Extract Fields and Values from User Input Update Record
	User Request Clarification	None
Post-Meeting Suggestions	Communicate with Customers	<ul style="list-style-type: none"> Draft or Review Email Send Meeting Request

Flows

When you turn on Agentforce Pipeline Management, these flows are activated. The flows retrieve data, send information to prompt templates for processing, and identify the opportunities to work on. To limit the agent to a certain job, deactivate the flows for the jobs that you're not using. You can also customize the flows for the specific needs of your business.

Job	Flow	usage
Opportunity Field Updates	Get Opportunity Grounding Data	Gets data from voice calls, video calls, notes, and emails associated with an opportunity, and sends the details to the associated prompt template as prompt instructions.
	Process Field Update Suggestions	Adds the agent user as an opportunity team member on

Job	Flow	usage
		eligible opportunities, and generates field update suggestions for the relevant fields on the opportunity record. Suggestions are generated based on the data sources that the user enables, such as conversation transcripts, emails, or notes.
Post-Meeting Suggestions	Get AI Recommendations from Call Transcripts	Gets AI-generated recommendations from voice and video call transcripts to pass to the agent.

Prompt Templates

Agentforce Pipeline Management includes the Recommend Next Step for Opportunity and Recommend Stage for Opportunity prompt templates for opportunity field updates. These prompt templates are ready to use. You can also create a custom prompt template to generate field update suggestions for custom opportunity fields.

Get Field Update Suggestions for Other Opportunity Fields

Agentforce Pipeline Management generates field update suggestions for the Next Step and Stage fields. You can also add other standard opportunity fields or custom fields.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited** editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

USER PERMISSIONS NEEDED

To edit prompt templates:

Prompt Template Manager Permission Set

AND

Manage Prompt Template

USER PERMISSIONS NEEDED

AND

Execute Prompt Template

To map prompt templates to Opportunity fields: Edit access on the Opportunity object

To create, edit, and manage flows: Manage Flow

Before you begin, check whether there's already a Field Generation prompt template for the field you want to use. A field can have only one Field Generation prompt template. Also, your agent must have permission to access the field.

Create a Prompt Template for the Field

1. Identify the standard or custom opportunity field that you want to use.

We recommend that you use standard text fields, not Long Text Area or Rich Text Area fields, because suggestions can't exceed 250 characters.

2. [Create a new prompt template](#) of the Field Generation type.

To make the customization process easier, copy the instructions from the Recommend Next Step for Opportunity prompt template. Then, adjust them to reference the field that you want instead of the Next Step field.

Don't change or remove the prompt instructions about the output. The output must be in the specified JSON structure to align with the user interface. Changing the structure or snippets can result in data showing incorrectly or not at all.

3. [Test your prompt template](#) thoroughly to make sure that you get the results you want. Then, when you're ready, activate it.

Edit the Process Field Update Suggestions Flow

After activating the prompt template for the opportunity field, update the flow.

1. From Setup, in the Quick Find box, search for *Flows*. In the Process Automation section, click **Flows**.
2. Select the active Process Field Update Suggestions flow and deactivate it to make changes.
3. Edit the Add Opportunity Fields to Collection assignment element.
 - a. Click **Add Assignment**.
 - b. For the variable, select **OpportunityFields**.
 - c. For the operator, select **Add**, and enter the API name of the custom field as the value.
4. [Test the flow](#) to make sure that you get the results you want. Then, when you're ready, save and activate it.

Modifying a prompt template or using a custom prompt template can increase latency and result in fewer opportunities being processed through the Process Field Update Suggestions flow. To improve processing times, filter opportunities for the agent to work on or adjust the flow schedule.

Add Data Sources to Enrich Field Update Suggestions in Agentforce Pipeline Management

Agentforce Pipeline Management can use notes, emails, or calls to inform the agent's field update suggestions. You can customize and expand the data sources that your agent uses. For example, use other opportunity fields or different sources, such as content from other objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited** editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

USER PERMISSIONS NEEDED

To edit prompt templates:

Prompt Template Manager Permission Set

AND

Manage Prompt Template

AND

Execute Prompt Template

To map prompt templates to Opportunity fields: Edit access on the Opportunity object

To create, edit, and manage flows: Manage Flow

Add Opportunity Fields as Data Sources

To use other opportunity fields to inform the agent's field update suggestions, edit the Field Generation prompt template instructions.

Before you begin, make sure that the agent has permission to access the opportunity field that you're adding as a data source.

1. From Setup, in the Quick Find box, enter and then select **Prompt Builder**.
2. Select the Field Generation prompt template that you want to use the opportunity field as a data source for.
For example, to use data from a custom opportunity field when generating field update suggestions for Next Step, select the Recommend Next Step for Opportunity prompt template.
If you're using your own prompt template, copy over the instructions from the Recommend Next Step for Opportunity prompt template. Then, adjust the instructions to reference the fields and data

sources that you want. Don't change or remove instructions about the output. The output must be in the specified JSON structure to align with the user interface. Changing the structure or snippets can result in data showing incorrectly or not at all.

3. On the prompt template, find the instructions about data sources.
 - a. Click **Insert Resource**.
 - b. Select the opportunity field that you want to add.
4. [Test your prompt template](#) thoroughly to make sure that you get the results you want. Then, when you're ready, activate it.

Add Data Sources to the Get Opportunity Grounding Data Flow

Use data from other Salesforce objects or external objects to inform the agent's opportunity field update suggestions.

Your data source must have an ID field that you can reference as a variable. Before you begin, confirm that the agent has permission to access the data source that you want to use.

1. From Setup, in the Quick Find box, enter and select **Flows**.
2. Select the **Get Opportunity Grounding Data** flow.
3. Above the Add Grounding Data to Prompt Instructions element, [add a new Get Records element](#) to retrieve information from your data source.

For example, to use data from tasks, create an element called Get Tasks.
4. Assign variables to the fields that you want to use.
 - a. Under How to Store Record Data, select **Choose fields and assign variables (advanced)**.
 - b. Under Where to Store Field Values, select **In separate variables**.
 - c. Store the record's ID field in a variable.

For example, to use data from tasks, store the Activity ID field in a variable called LatestTaskId.
 - d. Store other relevant fields in variables.

For example, to use data from tasks, store the Description field in a variable called LatestTaskDescription and the Subject field in a variable called LatestTaskSubject.
5. Go to the Add Grounding Data to Prompt Instructions element. [Add instructions](#) to retrieve the ID and the other fields that you're using from the data source.
6. Save and activate the flow.
7. Go to the prompt template that you're using to generate field update suggestions.

For example, the Recommend Next Step for Opportunity prompt template or your own custom prompt template.

 - a. Make sure that your prompt template has instructions to call the Get Opportunity Grounding Data flow as a data source.
 - b. Add an instruction to extract the ID for your data source. For example, "You must strictly extract the latestTaskId for tasks."
 - c. [Test your prompt template](#) thoroughly to make sure that you get the results you want. Then, when you're ready, activate it.

Agentforce Account Management

Use Agentforce Account Management to conduct deep research on accounts, build strategic positioning statements, and prepare for meetings. Create comprehensive briefings with company demographics, business priorities, key performance indicators (KPIs), industry trends, and more to anchor your entire sales strategy. When you save time with Agentforce Account Management, you can focus more on what really matters: building strong relationships with customers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

[Considerations for Agentforce Account Management](#)

Before you use Agentforce Account Management, keep these considerations in mind.

[Agentforce Account Management Overview](#)

Learn how Agentforce Account Management helps sales teams research accounts and identify strategic opportunities.

[Agentforce Account Management Permissions](#)

You use permission set groups to assign permissions to an AI agent or to an individual user. The Salesforce access controls that you put in place, such as licenses, permissions, and sharing settings, determine what each type of user can access.

[Set Up Agentforce Account Management](#)

To streamline account research and strategy for your team, set up Agentforce Account Management. Then, optimize the experience by configuring data sources and features.

[Agentforce Account Management Components](#)

Understand the different pieces that make Agentforce Account Management work.

Considerations for Agentforce Account Management

Before you use Agentforce Account Management, keep these considerations in mind.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

General Considerations

Agentforce Account Management uses the Sales Management agent template, and it inherits the same supported functionality, usage, limitations, allowances, limits, and other issues. See [Considerations for Agentforce Sales Management](#).

Data and Activity Considerations

Data Source	Considerations
Standard Fields	To generate accurate summaries and insights, accounts ensure there is populated data in standard fields, such as Type, Industry, Revenue, and Employees.
Voice and video calls	To generate insights from voice and video calls, enable Einstein Conversation Insights. The agent analyzes the most recent voice or video calls that are over 5 minutes in duration from the last 30 days.
Emails	To analyze and summarize email interactions, enable Einstein Activity Capture (EAC). The agent analyzes the 25 most recent emails from the last 30 days.
Content notes	The agent filters for notes created within the last 30 days.
Data persistence	Content generated by the agent isn't persisted in Salesforce.

Permissions and Access Considerations

- If the Account or Account Plan object has field-level security, the agent user automatically has permission to access standard fields on these objects.
- If you want the agent to use data in a custom field, assign the agent user permission to access the custom field.
- The agent-generated content that a user can view depends on the user's access to the data sources used to generate the content.

Consumption Considerations

- When users have the [Unmetered User Based AI permission](#) assigned, Agentforce Account Management billing is unmetered. To make sure that billing is unmetered, confirm that the

- Unmetered User Based AI permission set is granted System Permissions. And, assign this permission to all agents and users who use the feature.
- When users don't have the Unmetered User Based AI permission assigned, Agentforce Account Management consumes Flex credits.

Limits

- Agentforce Account Management doesn't fully support account hierarchies.
- Agentforce Account Management doesn't fully support person accounts.
- Agentforce Account Management doesn't use custom objects as agent activity sources.

Limitations

The agent uses only emails that are stored as EmailMessage records. Emails that aren't EmailMessage records don't inform the agent's suggestions.

See Also

- [Agentforce and Generative AI Usage and Billing](#)
[Considerations for Unmetered Agentforce Usage](#)

Agentforce Account Management Overview

Learn how Agentforce Account Management helps sales teams research accounts and identify strategic opportunities.

REQUIRED EDITIONS

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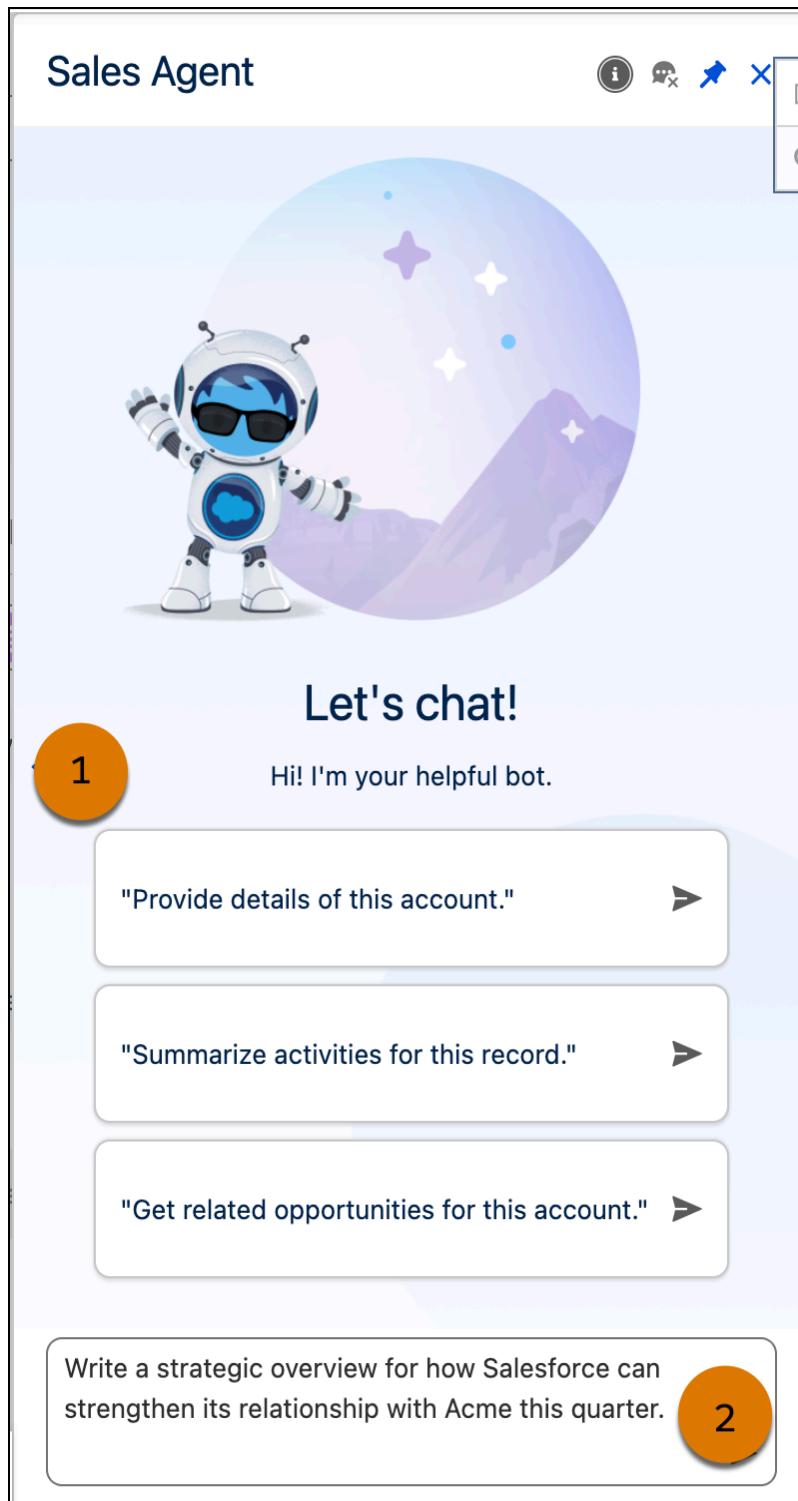
About Agentforce Account Management

Agentforce Account Management provides the Sales Management agent with a specialized topic to assist account managers. Instead of manually digging through multiple systems, sellers can ask the agent to perform deep research, summarize recent interactions, and recommend next steps. To provide a unified view of the account, the agent uses a combination of internal CRM data, such as Opportunities, Service Cases, Contacts, and Account Plans, and external web data, such as company news and industry trends.

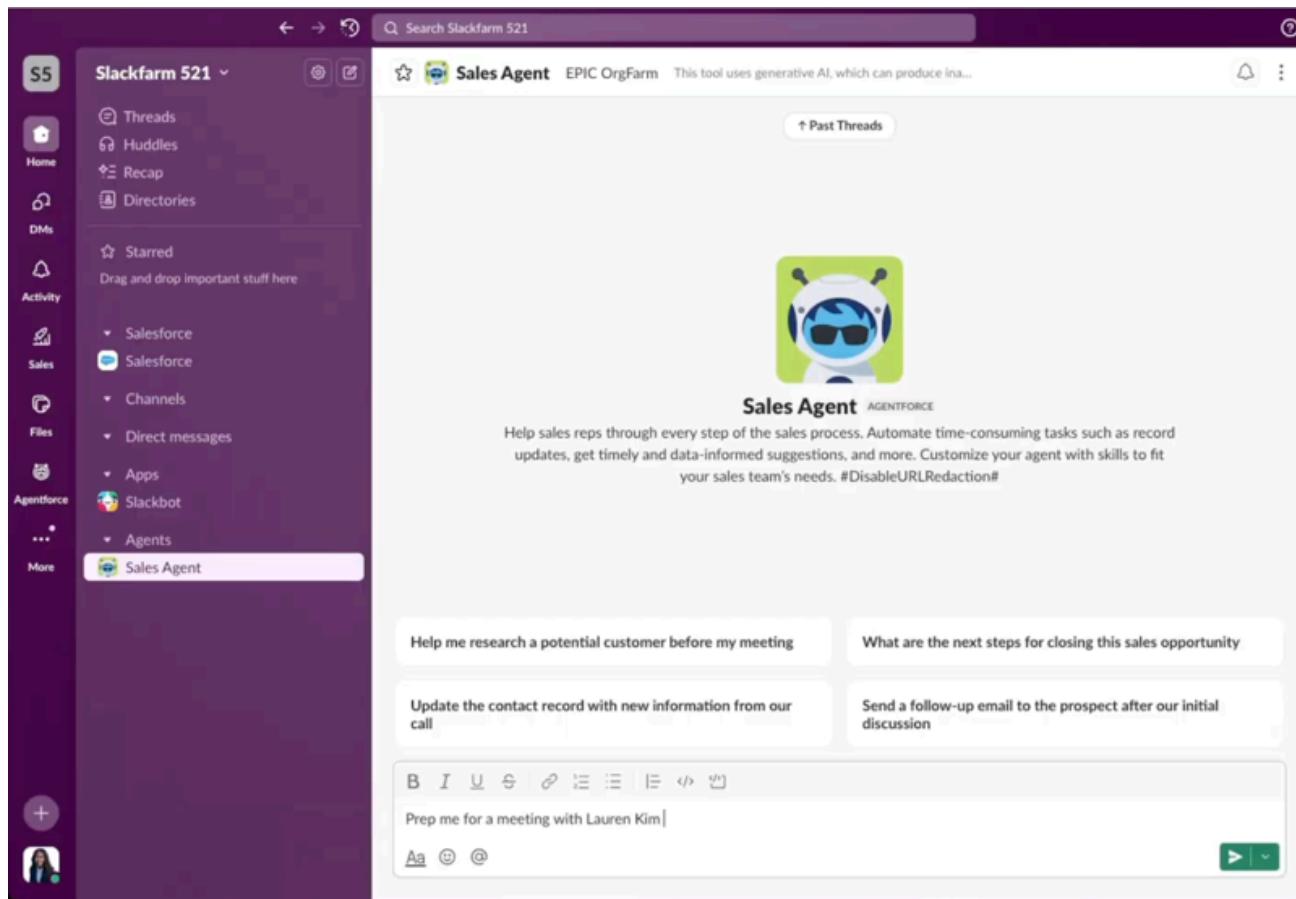
Key Capabilities of Agentforce Account Management

Automated Research	The agent can search for recent news, financial results, and strategic priorities for a specific account. It can create account briefs to help you prepare for meetings.
Interaction Summarization	Get summaries of the most recent calls, emails, and notes. The agent can identify key themes from recent conversations to make sure that you're up to date on the customer relationship.
Strategic Planning	Ask the agent to generate a strategic Point of View (POV) or suggest objectives for your Account Plan based on the customer's current challenges and industry trends.
Unified Insights	Access insights from disparate objects like Opportunities and Service Cases in a single conversational interface, reducing the time spent navigating records.

Access Agentforce Account Management in Salesforce and in Slack



When Agentforce Account Management is enabled, the Agentforce panel in Salesforce comes prepopulated with recommended questions that you can ask the agent (1). Or, ask the agent your own questions (2).



The Agentforce Sales agent in Slack also has prepopulated recommendations, which change depending on which Agentforce features are enabled. Ask the agent to help you prep for meetings, get account updates, and more.

Agentforce Account Management Permissions

You use permission set groups to assign permissions to an AI agent or to an individual user. The Salesforce access controls that you put in place, such as licenses, permissions, and sharing settings, determine what each type of user can access.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

User Permission Set Group

The Sales Management User permission set group includes the Use Agentforce Account Management permission set and the Use Agentforce Pipeline Management permission set. When you set up Agentforce Account Management, this permission set group is automatically assigned to you, the admin. Assign this permission set group to other users who use these features.

User Permission Sets

The Use Agentforce Account Management permission set is required to see the agent's topics and actions. This permission set is included in the Sales Management User permission set group.

When you turn on Agentforce, as the admin, you're assigned the Data Cloud User permission set. To give other Agentforce Account Management users view access to Data 360, assign them the Data Cloud User permission set.

Agent Permission Set Group

The Sales Management Agent User permission set group includes permission sets that the agent requires to perform its work. This permission set group is only for the automated agent user record. It's assigned to the agent user when you set up Agentforce Account Management.

Unmetered User Based AI Permission

The Unmetered User Based AI permission grants unmetered usage to agent and human users that interact with AI features under certain conditions. Assign this permission to the agent user. Then, assign the permission to any users who interact with Agentforce Account Management, including all admins.

If an agent user or a human user doesn't have this permission, their AI activity can incur metering charges. See [Metering for Agentforce and Generative AI Usage](#) and [Configure Unmetered User Based AI Permissions](#).

See Also

[Manage Permission Set Assignments](#)

[Manage Employee Agent Access](#)

Set Up Agentforce Account Management

To streamline account research and strategy for your team, set up Agentforce Account Management. Then, optimize the experience by configuring data sources and features.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

USER PERMISSIONS NEEDED

To set up Agentforce Account Management:

View Setup

AND

Modify All Data

OR

Customize Application

To build a Sales Management agent:

Manage AI Agents

AND

Manage Agentforce Employee Agents

OR

Customize Application

Turn On Agentforce Account Management

Turn on the features required to use Agentforce Account Management.

Before you begin, set up [Einstein Generative AI](#) and enable [Agentforce](#).

1. From the gear icon, select **Salesforce Go**.
2. On the Salesforce Go Home page, search for and select **Agentforce for Sales**.
3. Turn on Agentforce.
4. Turn on Account Management.

When you turn on Account Management, you're assigned the Sales Management User permission set group. The Sales Management agent is also created and assigned the Sales Management Agent User permission set group.

Add Features to Agentforce Account Management

Certain agent capabilities require you to turn on more features or configure settings. To get the most out of Agentforce Account Management, complete these steps.

1. Configure the Slack connection.

If your organization uses Slack, we create the Agentforce connection for you. To finish installing the agent and manage the configuration, go to Slack.

See [Set up and manage Agentforce in Slack](#).

2. Set up Einstein Conversation Insights.

Einstein Conversation Insights enables the agent to use voice and video calls as data sources. Access to this data provides richer responses, improving the relevance and quality of account briefs and meeting prep.

See [Set Up Einstein Conversation Insights](#).

3. Set up Einstein Activity Capture.

Einstein Activity Capture enables the agent to use captured emails as a data source for suggestions.

Access to this data improves the relevance and quality of the agent's responses.

See [Set Up Einstein Activity Capture](#).

4. Optimize Account Plan field permissions and sharing settings.

To get the most out of Agentforce Account Management, create a permission set that gives users access to additional fields on account plans. Then, configure your sharing settings. See [Select Who Can Use Sales Account Plans](#).

5. Configure Account Plan Objectives.

To improve the quality of agent responses, add specific, actionable, and measurable goals to your team's long-term growth strategy. See [Sales Account Plan Objectives, Measures, and Calculation Definitions](#).

Grant Users Access to Agentforce Account Management

To give users access to Agentforce Account Management, assign them the Sales Management User permission set group. Additionally, give them permission to access and use the Sales Management agent through a custom permission set.

1. In Salesforce Go, on the Agentforce Sales page, locate the Account Management section.
2. Go to the Manage User Access step and click **Manage**.
3. Assign the Sales Management User permission set group to the users who need access to Agentforce Account Management.

See Also

[Discover and Set Up Features with Salesforce Go](#)

[Set Up Your Agent](#)

[Agentforce Account Management Permissions](#)

Agentforce Account Management Components

Understand the different pieces that make Agentforce Account Management work.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Foundations and the Agentforce for Sales or Agentforce for an Industry add-on license, or included in Agentforce 1 Sales or an Industry Edition. Requires each user to have the Agentforce for Sales or Agentforce for an Industry add-on to access the actions.

Topics and Actions

Topics and actions determine what your agent can do and guide your agent interactions in the Agentforce panel. [Add these standard topics and actions](#) to your Sales Management agent. To limit the agent to a certain job, add only the topics and actions that correspond to that job.

JOB	TOPIC	ACTIONS
Research and synthesize information about an account or lead based on user input	Sales Research	<ul style="list-style-type: none"> • Get Conversation Intelligence • Get Related Emails • Search the Web • Get Activities Timeline • Get Related Notes • Get Account and Account Plan • Identify Record by Name • Query Records • Answer Questions with Knowledge • Get Record Research • Get Activity Details • Get Record Details
Create and update records	Record Management	<ul style="list-style-type: none"> • Extract Fields and Values • Identify Record by Name • Update Record • Update AI-Generated Action
Search Slack messages and channels	Slack Operations	<ul style="list-style-type: none"> • Update a Slack Canvas • Look Up a Salesforce Channel in Slack • Send Message to a Slack Channel

JOB	TOPIC	ACTIONS
		<ul style="list-style-type: none"> • Create a Slack Canvas • Summarize a Slack Channel • Share a Slack Canvas

Flows

When you turn on Agentforce Account Management, these flows are activated. The flows retrieve data, send information to prompt templates for processing, and identify the accounts and leads to research. You can customize the flows for the specific needs of your business.

JOB	FLOW	USAGE
Research and synthesize information about an account or lead based on user input	Get Account and Account Plan	Gets the latest active account plan created in the last year for the account ID passed into the flow. The flow prefers account plans owned by the current user.
	Get Record Research	Retrieves AI-generated research records for the account or lead passed into the flow.
	Get Content Notes for Record	Gets the latest related content note records and note body text associated with the account or lead record passed into the flow.
	Get Conversation Intelligence	Retrieves insights, teachable moments, and conversation trends from the latest video or voice call record that is related to the record passed into the flow.

Prompt Templates

Agentforce Account Management includes the Record Research prompt template, which comes with 7 preconfigured research prompts. These prompt templates are ready to use. You can create custom prompt templates based on the Record Research prompt template to address specific industry or company needs.

See Also

[Standard Agent Action Reference](#)

Automate Your Business Processes with Salesforce Flow
Standard Prompt Templates

Agentforce Sales Coach

Empower your team to engage with customers more effectively using Agentforce Sales Coach, a personal AI coach integrated into Sales Cloud. Agentforce Sales Coach provides personalized coaching and feedback in real time to improve user interactions. It analyzes communication within Salesforce object records to give clear, actionable insights, and prepares reps for challenging conversations through interactive role-playing.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions.

[Agentforce Sales Coach Overview](#)

Get a high-level overview of what Agentforce Sales Coach is, how it works, and how it can support reps to thrive in their roles.

[Ethical Guidance for Agentforce Sales Coach](#)

Review legal and ethical guidelines before enabling and activating Agentforce Sales Coach.

[Considerations for Using Agentforce Sales Coach](#)

Review these considerations and limitations around setup and usage of Agentforce Sales Coach.

[Generative AI Considerations for Agentforce Sales Coach](#)

To use Agentforce Sales Coach, consider the supported functionality, usage, limitations, allowances, limits, and other issues.

[Setting Up Agentforce Sales Coach](#)

Complete the required steps to turn on Agentforce and create your Agentforce Sales Coach.

[Agentforce Sales Coach Scenarios](#)

A coaching scenario simulates real-world situations, giving users a risk-free environment to practice, improve, and build confidence. These realistic interactions reflect common challenges, with step-by-step guidance from Agentforce Sales Coach to help users strengthen their skills and strategy.

[Customizing Agentforce Sales Coach](#)

Agentforce Sales Coach comes ready to coach sales reps on an active Opportunity. Make the experience more impactful by customizing the Opportunity coaching scenarios with your sales stages and best practices. Additionally, create custom scenarios that target the types of behaviors and skills you want to coach your reps on.

[Testing Agentforce Sales Coach Customizations Before Deployment](#)

Make sure that any customizations you make to Agentforce Sales Coach are operating as expected by thoroughly testing each one.

[Use Cases for Customizing Agentforce Sales Coach](#)

View common examples of how to customize Agentforce Sales Coach to meet your business goals.

Track Agentforce Sales Coach Usage

Create a report on the Task object to track the Agentforce Sales Coach usage metrics.

Agentforce Sales Coach Overview

Get a high-level overview of what Agentforce Sales Coach is, how it works, and how it can support reps to thrive in their roles.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

What Is Agentforce Sales Coach?

Agentforce Sales Coach is an autonomous agent built on the Agentforce platform. Using generative AI and CRM data, it provides personalized feedback to help reps communicate more clearly, improve their understanding, and engage with customers effectively.

Accessible on any Salesforce object record via the [Agentforce Sales Coach](#) Lightning Web Component, Agentforce can provide coaching for every customer-facing role in your organization. Agentforce Sales Coach helps users improve by providing feedback on presentations and by simulating role-play scenarios with real-time coaching.

For example, we have ready-to-use coaching scenarios for sellers.

- For opportunities in the Qualification or Needs Analysis stage, Agentforce Sales Coach analyzes a rep's presentation and provides them with specific feedback by using the Agentforce Sales Coach: Opportunity Coaching agent topic.
- For opportunities in the Negotiation/Review stage and Proposal/Pricing Quote stage, Agentforce Sales Coach acts as the customer and provides the rep with detailed feedback to improve that interaction with the customer.
- Role-play sessions use the Agentforce Sales Coach: Negotiation and Review Role-Play and Agentforce Sales Coach: Proposal and Pricing Quote Role-Play agent topics.

While analyzing each pitch, presentation, or role-play session, Agentforce Sales Coach cross-references what the user said with specific CRM data for the record they were practicing for. Feedback can also be augmented using the Agentforce Data Library to reference external, company-specific data. For more information, see [Agentforce Sales Coach Grounding with RAG](#).

Required Features

Agentforce Sales Coach requires these features to operate correctly, access CRM data, and generate feedback.

- Agentforce: Agentforce Sales Coach uses Agentforce to configure and manage events. See [How Einstein Copilot Works](#).
- Einstein Generative AI: Agentforce Sales Coach uses Einstein Generative AI to power our prompts templates and guide the large language model (LLM) to generate feedback for the rep. See [About Einstein Generative AI](#).
- Agentforce Studio: Agentforce Sales Coach uses Agentforce Studio to configure topics and actions, power Agentforce Sales Coach, and ultimately equip our agent with the ability to role-play and generate feedback. See [Agentforce: Agents and Copilot](#).
- Data 360: Agentforce Sales Coach uses Data 360 to host files and support retrieval-augmented generation (RAG). See [Ground with Retrieval Augmented Generation \(RAG\) in Data Cloud](#).

See Also

- [The Building Blocks of Agents](#)
[Setting Up Agentforce Sales Coach](#)

Ethical Guidance for Agentforce Sales Coach

Review legal and ethical guidelines before enabling and activating Agentforce Sales Coach.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

Agent User Creation

When using personal names for AI agents, always make sure the agent's function is explicitly mentioned to maintain transparency about its AI nature. Use a name that describes the function, job, or task rather than the agent performing it. For example, Acme's AI Sales Coach.

Transcript-Based Evaluation

We recommend not instructing the agent to provide feedback on aspects such as tone, body language, or facial expressions, as Agentforce Sales Coach's evaluations are solely based on transcripts. The agent can accurately assess the content of the presentation, but it can't evaluate nonverbal cues. Focusing on feedback related to the structure, clarity, and key message delivery ensures the most reliable results.

Presentation Scores

We recommend against instructing the agent to "score" a rep's talking points, as large language models (LLMs) can introduce variability and randomness in rubric-based scoring. While LLMs excel at analyzing patterns in data and providing valuable insights, they aren't designed for consistent scoring of performance. Prompting the LLM score on performance can lead to variability in assessments. As a

result, using an LLM to score a pitch or presentation can lead to inconsistent or unreliable assessments. For more accurate feedback, focus on using the agent for content evaluation, such as the clarity of messaging and the inclusion of key points.

Known AI Limitations

- Artificial hallucinations: AI can mistakenly fill in gaps or make assumptions based on patterns it has learned during training. For Agentforce Sales Coach, AI can invent information to fill in missing details or inaccurately assume context for a specific scenario.
 - Misinterpretation of words: Different speech variations, homophones, and pronunciations can lead AI transcribers to misinterpret words, leading to incorrect transcriptions. The misinterpretation of words can lead to sentences that don't make grammatical sense, which can affect the interpretation of the transcript and cause misunderstanding of the speaker's intent.
To address misinterpretation of words, users can review a live transcript during role-play sessions as they speak, allowing real-time verification of their transcription.
-  **Note** This feature isn't available for stand-and-deliver sessions.
- Errors: The use of flawed transcripts (such as from hallucinations or misinterpretation) by the LLM can lead to incorrect evaluations because the analysis is based on inaccurate or incomplete data.

Considerations for Using Agentforce Sales Coach

Review these considerations and limitations around setup and usage of Agentforce Sales Coach.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer Editions** with Foundations or Agentforce 1 Editions.

- Data 360 is a required feature and must be turned on before enabling Agentforce Sales Coach.
- Admins need the Data Cloud Architect permission set to turn on Data 360.
- The agent user needs the Data Cloud Architect permission set to access Data 360.
- You can have only one active Agentforce Sales Coach for a Salesforce org.
- The Agentforce Sales Coach add-on has a limit of 25,000 user permissions.
- Agentforce Sales Coach supports a maximum of 20 active scenarios on any given object and a total of 500 scenarios for each agent version.
- You can't delete a topic associated with a coaching scenario.
- Knowledge articles aren't supported in Agentforce Data Libraries for Agentforce Sales Coach.
- Agentforce Sales Coach isn't supported on the Salesforce mobile app.
- The coaching that reps receive is most effective when the object has all the necessary CRM data fields populated.
- Use the Sales Coaching prompt template type to generate feedback in custom coaching scenarios.
- Admins can create a coaching scenario only if their org language is English.
- Consumption credits are consumed when using the Preview functionality.

- Agentforce Sales Coach shows an error for Opportunity records when both these conditions are met:
 - When an org is upgraded to the Coach Everywhere version and provisioned with the ready-to-use scenarios (by clicking **Populate Data** under Coaching Scenarios in Agentforce Builder).
 - When the Organization-Wide Default (OWD) sharing setting for the Opportunity object is set to Private.

To resolve this issue, change the Sharing Settings for Opportunity to Public Read Only or create a custom permission set that grants View All Records access and assign it to the Agent User. See this [Known Issue](#) for details.

- To generate feedback, coaching sessions must meet minimum length requirements.
 - Role-play scenarios require at least three conversational exchanges between the user and Agentforce Sales Coach, with at least 60 words.
 - Present scenarios require the rep to speak at least 100 words.

If a session is too short, Agentforce Sales Coach shows an error message.

Generative AI Considerations for Agentforce Sales Coach

To use Agentforce Sales Coach, consider the supported functionality, usage, limitations, allowances, limits, and other issues.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions.

Agentforce Sales Coach Language and Locale Support

Agentforce Sales Coach currently supports 16 non-English languages. These include French, German, Italian, Japanese, Spanish, Portuguese, Arabic, Catalan, Chinese (Simplified), Chinese (Traditional), Danish, Dutch, Finnish, Hebrew, Korean, Norwegian, and Swedish.

Agentforce Sales Coach Large Language Model Support

Agentforce Sales Coach supports these models.

Model
OpenAI GPT-4o mini

Einstein Trust Layer Service Support

Agentforce Sales Coach supports the Trust Layer services provided on the Salesforce generative AI platform, as described in [Einstein Trust Layer](#). Ask your system administrator about which Einstein Trust Layer services are enabled in your Salesforce org and available for Agentforce Sales Coach.

Region Support

Agentforce Sales Coach supports these models for geo-aware request routing.

Model	API Name
GPT 4 Omni (GPT-4o)	sfdc_ai__DefaultGPT4Omni

Agentforce Sales Coach and Generative AI Usage

Agentforce Usage Types (for Agentforce conversations) and Einstein Requests are metrics for generative AI. The use of generative AI capabilities, in either a production or sandbox environment, consumes Einstein Requests and possibly Data 360 credits. To learn more, see [Generative AI Billable Usage Types](#).

Agentforce Sales Coach stores and processes data using Data 360. Agentforce Sales Coach consumes credits used for billing based on your usage of the feature.

Usage Types Billed by Agentforce Sales Coach

Card	type	description	notes
Einstein Requests	Einstein Requests	Usage is calculated based on API calls to the LLM gateway.	See Generative AI Billable Usage Types
Conversation	Agentforce Sales Coach (Inbound)	Usage is calculated based on conversations. A conversation starts when the user clicks "Get Feedback" after a role-play or stand-and-deliver coaching session.	Inbound conversations are conversations that a user initiates.

Data Cloud One Support

Agentforce Sales Coach is supported in Data Cloud One companion orgs.

Setting Up Agentforce Sales Coach

Complete the required steps to turn on Agentforce and create your Agentforce Sales Coach.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with

Foundations or Agentforce 1 Editions.

Agentforce Sales Coach Permissions

Agentforce Sales Coach includes multiple permission sets based on a user's persona and responsibility. The permission sets include individual user permissions and object permissions.

Set Up Agentforce Sales Coach

Turn on the required features and assign the permissions to begin setting up Agentforce Sales Coach. When you're done, move on to Agentforce Builder to finish creating and activating Agentforce Sales Coach.

Build and Activate Agentforce Sales Coach

Finish setting up Agentforce Sales Coach by creating an agent in Agentforce Builder. Before you get started, make sure you've completed the steps in Set Up Agentforce Sales Coach.

Agentforce Sales Coach Grounding with RAG

Use retrieval augmented generation to ground Agentforce Sales Coach prompt templates with accurate, current, and pertinent information to improve the relevance and value of the agent's role-play and feedback.

Add Retrievers to Prompt Templates for Agentforce Sales Coach

When using RAG to ground Agentforce Sales Coach, add the Agentforce Data Library retriever to relevant prompt templates for the agent to reference your uploaded files.

Agentforce Sales Coach Permissions

Agentforce Sales Coach includes multiple permission sets based on a user's persona and responsibility. The permission sets include individual user permissions and object permissions.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions.

User Permission Set

The Use Agentforce Sales Coach permission set allows users to access and use Agentforce Sales Coach. This permission set includes these permissions.

- Execute Prompt Template
- Use Agentforce Sales Coach

Manager Permission Set

The Manage Agentforce Sales Coach permission set allows Salesforce admins to turn on and configure Agentforce Sales Coach. This permission set includes these user permissions.

- Configure Agentforce Sales Coach
- Execute Prompt Template
- Manage Agents
- Manage Prompt Templates
- Use Agentforce Sales Coach
- View Roles and Role Hierarchy
- View Setup and Configuration

Agent Permission Set

The Agentforce Sales Coach permission set is for the agent user record only. Don't assign this permission set to any other user. This permission set includes the Agentforce Sales Coach and Execute Prompt Templates user permissions. For any Salesforce object that has a coaching scenario, the agent user must be able to access the relevant data fields. If your organization's sharing is set as Private, update the agent user.

To make an object visible to the agent, create a custom permission set and assign it to the agent user. In that custom permission set, set the Object Permissions for Salesforce objects as: **Read** and **View All Fields**, and set the License to None.



Note The License field must be set to None because the Einstein Agent User can't be assigned with permission sets with a base license.

Set Up Agentforce Sales Coach

Turn on the required features and assign the permissions to begin setting up Agentforce Sales Coach. When you're done, move on to Agentforce Builder to finish creating and activating Agentforce Sales Coach.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions.

USER PERMISSIONS NEEDED

To enable Agentforce Sales Coach: Prompt Template User

To turn on Data 360: Data Cloud Architect

To add Agentforce Sales Coach to a record page: Manage Agentforce Sales Coach

1. From Setup, enter *Salesforce Go* in the Quick Find box, and then select **Salesforce Go**.
2. Under Get Started With Agentforce, find Agentforce for Sales, and click **Set Up**.
3. Turn on Agentforce.

4. Turn on the Agentforce Sales Coach template.
5. Click **Confirm** to accept the use of generative AI and Agentforce Sales Coach.
6. Manage and assign permission sets to users.
 - Assign the Manage Agentforce Sales Coach permission set to yourself.
 - Assign the Use Agentforce Sales Coach permission set to reps.
7. Add the Agentforce Sales Coach standard components, fields, and actions to the record pages.
 - a. Click **Manage** and open the record page in Lightning App Builder.
 - b. Drag-and-drop Agentforce Sales Coach to record page layouts, as required, based on the scenarios.
 - c. [Activate Lightning Experience record pages](#).
8. Build and activate an agent from Agentforce Builder. For steps, see [Build and Activate Agentforce Sales Coach](#).

Build and Activate Agentforce Sales Coach

Finish setting up Agentforce Sales Coach by creating an agent in Agentforce Builder. Before you get started, make sure you've completed the steps in Set Up Agentforce Sales Coach.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions.

USER PERMISSIONS NEEDED

To create an agent:	Manage Agentforce Sales Coach
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 **Note** If you accessed Agentforce Builder from step 8 of the Agentforce Sales Coach setup page, start on step 5 of this task.

1. From Setup, enter *Agents* in the Quick Find box, and then select **Agentforce Agents**.
2. Click **New Agent**.
3. Select **Agentforce Sales Coach** as the agent type.
4. Click **Next**.
5. Review the topics shown, and verify these topics are added.
 - Agentforce Sales Coach: Opportunity Coaching
 - Agentforce Sales Coach: Negotiation/Review Role-Play
 - Agentforce Sales Coach: Proposal Quote Role-Play
6. Click **Next**.
7. Provide the required information for your agent.
 - Enter the agent name and API name.
 - Description: A description to explain the goals of your agent.
 - Role: The job description for your agent like key tasks, daily responsibilities, and how it responds to customers.
 - Company: The company that this agent represents.
 - Agent User: If you selected *New Agent User* in Agentforce Builder when building your agent, a

user is created and associated with the agent automatically. Otherwise, search and select an existing agent user.

8. Click **Next**.
9. Review the Language Settings. Select from the set of languages your agent can use for conversational responses and select the appropriate tone. Then, click **Next**.
Your agent is created and ready for activation.
10. (Optional) [Create an Agentforce Data Library](#) and upload files.
 - a. Update the agent user permission set to access the default data space. For steps, see [Verify Access to Data Space](#).
 - b. Add the retriever for Agentforce Data Library to your prompt templates.
11. Click **Activate** when you're ready to make your agent available to users.

Agentforce Sales Coach Grounding with RAG

Use retrieval augmented generation to ground Agentforce Sales Coach prompt templates with accurate, current, and pertinent information to improve the relevance and value of the agent's role-play and feedback.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions.

Create an Agentforce Data Library and upload files to it to provide Agentforce Sales Coach with trusted data for [RAG](#). Consider including sales methodology, objection handling techniques, buyer personas, and playbooks. Additionally, tips, best practices, industry insights, and examples of successful pitches are also good resources to include. These resources help Agentforce Sales Coach generate feedback for your reps that reflects your company's selling methodology.

After your files are in a data library, Data 360 creates a search index and retriever for Agentforce Sales Coach to use. In order for Agentforce Sales Coach to use information from the data library, add the retriever from the data library to the relevant prompt templates. [Learn more about retrievers](#).

Here's an example of how to insert a retriever in a prompt template and instruct Agentforce Sales Coach to reference the retriever and files in the Agentforce Data Library.

"Reference the Discovery process that the company uses

`EinsteinSearch:RagFileUDMO_SI_1Cx_QFx6a79befc.results` and include a hyperlink to the best resource for a sales executive."

With the right files in the data library, Agentforce Sales Coach can generate feedback specific to your business and link directly to relevant resources to better support reps to succeed.

See Also

[Ground with Retrieval Augmented Generation \(RAG\) in Data Cloud](#)

[Add a Retriever to a Prompt Template](#)

[Trailhead: Retrieval Augmented Generation: Quick Look](#)

Add Retrievers to Prompt Templates for Agentforce Sales Coach

When using RAG to ground Agentforce Sales Coach, add the Agentforce Data Library retriever to relevant prompt templates for the agent to reference your uploaded files.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

See Also

[Retrieve Data](#)

Verify Access to Data Space

Before you add retrievers, make sure that the Agentforce Sales Coach permission set has access to the default data space specific to the Agentforce Data Library.

1. From Setup, enter *Permission Sets*, and then select **Permission Sets**.
2. Select the **Agentforce Sales Coach** permission set.
3. Under the Apps section, click **Data Cloud Data Space Management**.
4. Click **Edit** on Data Spaces and select the default option.
5. Click **Save**.

Add Retrievers to Prompt Template

Follow these steps to add retrievers to the prompt template.

1. In Prompt Builder, select the prompt template you wish to add a retriever to.
2. Click the Resources search bar.
3. Click **Einstein Search**.
4. Click **RagFileUDMO**.
5. Select the retriever for your Agentforce Data Library.
Retriever names align with the Agentforce Data Library name.
6. Add written instructions in the prompt template for the LLM to know how to use the retriever. For example, “Reference the discovery process the company uses `EinsteinSearch:RagFileUDMO_SI_1Cx_QFx6a79befc.results` and include a hyperlink to the best resource for a sales executive.”
7. Save your changes.

Agentforce Sales Coach Scenarios

A coaching scenario simulates real-world situations, giving users a risk-free environment to practice, improve, and build confidence. These realistic interactions reflect common challenges, with step-by-step guidance from Agentforce Sales Coach to help users strengthen their skills and strategy.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

-  **Note** The agent user for Agentforce Sales Coach doesn't have access to all the Salesforce objects by default. To make sure the agent user can access the necessary objects and fields, create a permission set using the Einstein Agent license. Grant the Read and Field access, and assign the permission set to the agent user. Don't grant View All or Modify All access to the agent user.

[Get Started with Ready-To-Use Scenarios](#)

Agentforce Sales Coach includes a set of ready-to-use scenarios designed to help reps practice and improve their skills.

[Create a Coaching Scenario](#)

A coaching scenario represents an end-to-end coaching session where a rep practices a skill, through a presentation or role-play. Agentforce Sales Coach evaluates the session and provides feedback based on the rep's performance. Create custom scenarios for targeted practice and refinement of core skills such as overcoming objections, handling difficult customer conversations, and more.

[Agentforce Sales Coach Ready-To-Use Scenarios](#)

Agentforce Sales Coach provides a few prebuilt scenarios out-of-the-box that are specific to the Sales Opportunity object: Present Your Knowledge, Practice Your Pitch, Role-Play with Your Coach, and Sharpen Your Negotiation Skills.

Get Started with Ready-To-Use Scenarios

Agentforce Sales Coach includes a set of ready-to-use scenarios designed to help reps practice and improve their skills.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

For more information, see [Agentforce Sales Coach Ready-To-Use Scenarios](#).

To get started, populate the ready-to-use scenarios to your org.

1. From Setup, enter *Agentforce Studio* in the Quick Find box, and then select **Agentforce Agents**.

2. In Agentforce Studio, click **Agentforce Sales Coach**.
3. Click **Open in Builder**.
4. In Agentforce Builder, select **Coaching Scenarios** from the sidebar menu.
5. Click **Populate Data**.

Create a Coaching Scenario

A coaching scenario represents an end-to-end coaching session where a rep practices a skill, through a presentation or role-play. Agentforce Sales Coach evaluates the session and provides feedback based on the rep's performance. Create custom scenarios for targeted practice and refinement of core skills such as overcoming objections, handling difficult customer conversations, and more.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions.

USER PERMISSIONS NEEDED

To create a coaching scenario: Manage Agentforce Sales Coach

As a prerequisite, make sure that the scenario components: topic, action, and prompt templates are created.

To create a coaching scenario, use Agentforce Builder.

1. From Agentforce Builder, select **Coaching Scenarios**.
2. Click **New Scenario**.
3. Provide the required details.
 - Enter the scenario name and select the Salesforce object associated with the scenario.
 - Enter the scenario description and user guidance.
 - Select the scenario components: scenario type, topic for role-play (if the scenario type is role-play), feedback topic, action, and the prompt template associated with the scenario.
4. Click **Save**. You can preview the scenario to make sure all settings and permissions are configured correctly before activating it. Click the actions menu against the scenario and select **Preview**.
5. To activate the scenario, click the actions menu against the scenario and select **Activate Scenario**.

 **Note** Agentforce Sales Coach now supports multiple languages. To create scenarios in a language other than your org's default, use Translation Workbench to add translations for your custom scenarios. For more information, see [Translation Workbench](#).

Agentforce Sales Coach Ready-To-Use Scenarios

Agentforce Sales Coach provides a few prebuilt scenarios out-of-the-box that are specific to the Sales Opportunity object: Present Your Knowledge, Practice Your Pitch, Role-Play with Your Coach, and

Sharpen Your Negotiation Skills.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

Scenario title	Scenario Type	Agent Topic	Agent Action	Prompt Template
Present Your Knowledge	Present	Agentforce Sales Coach: Opportunity Coaching	Agentforce Sales Coach: Give Feedback on Qualification Stage	Get Qualification Stage Feedback
Practice Your Pitch	Present	Agentforce Sales Coach: Opportunity Coaching	Agentforce Sales Coach: Give Feedback on Needs Analysis Stage	Get Needs Analysis Stage Feedback
Role-play with Your Coach	Role-Play	Agentforce Sales Coach: Proposal and Pricing Quote Role-Play	None	None
		Agentforce Sales Coach: Opportunity Coaching	Agentforce Sales Coach: Give Feedback on Proposal Stage	Get Proposal / Pricing Quote Stage Feedback
Sharpen Your Negotiation Skills	Role-Play	Agentforce Sales Coach: Negotiation and Review Role-Play	None	None
		Agentforce Sales Coach: Opportunity Coaching	Agentforce Sales Coach: Give Feedback on Negotiation and Review Stage	Get Negotiation / Review Stage Feedback

- For coaching on an Opportunity, we provide a different scenario for each opportunity stage. You can edit these scenarios to reflect your opportunity stages or add more scenarios if you have additional stages that you want to target.
- Each role-play has its own topic because the role-play scenarios differ in terms of when they occur in the sales cycle and the type of conversations a rep has with a customer. Each topic includes a classification description, scope, and specific instructions tailored to the opportunity stage and the agent's behavior when acting as a buyer in that stage.

- For all opportunity coaching scenarios, in this example, we use a topic called Agentforce Sales Coach: Opportunity Coaching, which includes multiple actions. Each action calls a discrete prompt template that has instructions reflecting the opportunity stage and the behaviors the rep was expected to demonstrate during the presentation or role-play.

Considerations for Receiving Coaching for Ready-To-Use Scenarios

Review these considerations and limitations for Opportunity coaching.

Agentforce Sales Coach Feedback for Ready-To-Use Scenarios

Agentforce Sales Coach provides reps with feedback based on the criteria established in prompts templates. Out-of-the-box, Agentforce Sales Coach offers specific prompts for default opportunity stages that align and provide the large language model (LLM) with stage-specific criteria to look for. Review the prompt templates and referenced CRM data, and update the instructions to reflect your selling guidance and stages.

Considerations for Receiving Coaching for Ready-To-Use Scenarios

Review these considerations and limitations for Opportunity coaching.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

- Opportunity Stage is a customizable field in Salesforce. The stage names used by Agentforce Sales Coach align with standard opportunity stages provided by Salesforce. If you have customized opportunity stages, some text outputs, prompt templates, agent topics, and agent action names likely won't match your custom stages.
- Agentforce Sales Coach ready-to-use scenarios are built to coach sales reps on opportunities in these stages.
 - Qualification
 - Needs Analysis
 - Proposal/Pricing Quote
 - Negotiation/Review
- Be sure to review the prompt templates and referenced CRM data, and update the instructions to reflect your selling guidance and stages.

Agentforce Sales Coach Feedback for Ready-To-Use Scenarios

Agentforce Sales Coach provides reps with feedback based on the criteria established in prompts templates. Out-of-the-box, Agentforce Sales Coach offers specific prompts for default opportunity stages that align and provide the large language model (LLM) with stage-specific criteria to look for. Review the prompt templates and referenced CRM data, and update the instructions to reflect your selling guidance and stages.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

CRM Data

In order for Agentforce Sales Coach to provide reps with accurate feedback and effective coaching, we provide the agent with visibility to select CRM data from the opportunity the rep is accessing the agent from. The fields in the CRM data column represent the data fields that Agentforce Sales Coach must be granted access to for effective coaching.

Opportunity stage	CRM data element
Qualification	<ul style="list-style-type: none">• User.FirstName• OpportunityId.Account.Name• OpportunityId.StageName• OpportunityId.Account.Industry• OpportunityId.Account.Description• OpportunityId.Description• OpportunityId.Probability• OpportunityId.IqScore• OpportunityId.HasOverdueTask• OpportunityId.Amount• OpportunityId.NextStep• OpportunityId.HasOpenActivity
Needs Analysis	<ul style="list-style-type: none">• User.FirstName• OpportunityId.Account.Name• OpportunityId.Account.Industry• OpportunityId.StageName• OpportunityId.Account.Description• OpportunityId.Description• OpportunityId.HasOverdueTask• OpportunityId.NextStep• OpportunityId.HasOpenActivity• OpportunityId.Snapshot
Proposal/Pricing Quote	<ul style="list-style-type: none">• User.FirstName• OpportunityId.Account.Name• OpportunityId.StageName

Opportunity stage	CRM data element
	<ul style="list-style-type: none"> • OpportunityId.Account.Description • OpportunityId.Description • OpportunityId.NextStep • OpportunityId.Account.Industry • OpportunityId.Snapshot
Negotiation/Review	<ul style="list-style-type: none"> • User.FirstName • OpportunityId.Account.Name • OpportunityId.Account.Description • OpportunityId.Description • OpportunityId.NextStep • OpportunityId.Account.Industry • OpportunityId.Snapshot

Feedback Criteria

Agentforce Sales Coach analyzes the transcript from the rep's presentation to identify how well the rep can answer stage-specific questions included in the prompt template. The agent also compares the rep's answer to the information from the CRM data fields included in the prompt template. All this information is then used to generate feedback and coaching guidance for the rep.

Opportunity stage	Stage-specific questions
Qualification	<ul style="list-style-type: none"> • What's the business of the customer? • What problem is the customer trying to solve? • How does solving these problems help the customer? • Why is the timing good for them? • What's the customer's budget? • If the customer's budget is less than the opportunity amount, how can the sales executive resolve that so that the deal can move forward in the sales process? • What other solutions is the customer considering?
Needs Analysis	<ul style="list-style-type: none"> • Why are our solutions a good fit for the customer?

Opportunity stage	Stage-specific questions
	<ul style="list-style-type: none"> • How are our solutions better than our competitors? • How well do our solutions scale for the customer? • What resources are available to implement the solutions?
Proposal/Pricing Quote	<ul style="list-style-type: none"> • Where is the customer in the buying cycle? • What's the process to generate purchase orders? • Who are the customer's key decision makers when it comes to purchasing solutions or services? • Are the key decision makers added to the opportunity? • How can you communicate the value of our solutions to those decision makers? • What's the status of quantifying return on investment with the decision makers?
Negotiation/Review	<ul style="list-style-type: none"> • Have you confirmed that all key decision makers are in support of the deal? • Have you offered a discount or other pricing incentive to the customer? • Have you sufficiently addressed all customer objections and concerns related to your proposal?

Feedback Output

Agentforce Sales Coach analyzes rep's transcripts from their presentation or role-play session. It assesses their proficiency and effectiveness in responding to stage-specific questions and cross-references the transcript with the opportunity's CRM data. Using this information, it then generates a comprehensive feedback report for the rep to review.

Feedback is generated and broken down into categories based on the type of practice exercise they completed.

Feedback for presentation practice sessions is broken down into these categories.

Category	Description
Deal Summary	Summarizes the opportunity using the specified CRM data fields. The summary includes the opportunity stage, customer name, amount, and probability to close (if available).
Feedback	States whether the rep was successful in answering the stage-specific questions for the opportunity stage the deal is in. Includes direct quotes from the rep during the practice session to be used as examples and supporting evidence for feedback.
Needs Attention	Verifies whether the rep's presentation aligns with the CRM data for the object record and calls out any discrepancies. If no discrepancies are found, checks for any overdue activities.
Next Steps	Provides an unordered list of two to four tasks for the rep to focus on based on the feedback provided.

Feedback for role-play sessions is broken down into these categories.

Category	Description
Deal Summary	Summarizes the opportunity, using the specified CRM data fields. The Summary includes the opportunity stage, customer name, amount, probability to close (if available), IQ score, and any changes to the current amount.
Overall Impression	States whether the rep successfully answered the stage-specific questions and directly quotes the rep to support the feedback generated.
Key Strengths	Describes what the rep did well, such as any communication or selling techniques used.
Areas for Improvement	Describes instances when the rep can be effective in their response and communication.
Next Steps	Provides an unordered list of two to four tasks for the rep to focus on based on the feedback provided.

Customizing Agentforce Sales Coach

Agentforce Sales Coach comes ready to coach sales reps on an active Opportunity. Make the experience more impactful by customizing the Opportunity coaching scenarios with your sales stages and best practices. Additionally, create custom scenarios that target the types of behaviors and skills you want to coach your reps on.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

Custom scenarios allow you to incorporate business, role, and company-specific aspects that make the agent's coaching as relevant and applicable as possible for your reps.

Before you customize any of the agent's components, learn more about agent [topics](#), [actions](#), and [prompt templates](#).

[Agentforce Sales Coach Components](#)

Before you begin customizing Agentforce Sales Coach, make sure you understand the components that define and make our agent functional.

[Role-Play Topic Customization for Agentforce Sales Coach](#)

Edit the agent topics associated with each role-play scenario to customize how Agentforce Sales Coach conducts itself in role-play scenarios.

[Feedback Customization for Agentforce Sales Coach](#)

Modify the feedback Agentforce Sales Coach generates so it better aligns to your organization and rep's needs.

Agentforce Sales Coach Components

Before you begin customizing Agentforce Sales Coach, make sure you understand the components that define and make our agent functional.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

Topics

An agent topic is a particular job an agent can do and an essential element of an agent's reasoning. Agentforce Sales Coach uses topics to conduct role-plays and provide feedback to end users.

Agentforce Sales Coach offers prebuilt standard agent topics, making it easy to get started with coaching

on Opportunity records. These prebuilt topics can also serve as a guide when you create your own coaching scenarios. The description, scope, and instructions of a topic varies based on the type of coaching scenario.

Actions

An action is essentially a task that the agent can perform. In Agentforce Sales Coach, actions instruct the agent to provide reps with feedback for a given coaching scenario.

For Agentforce Sales Coach, actions must have a prompt template as the reference action type. When creating your scenarios, the action to call the prompt for feedback must be its own topic, not the same for a role-play.

Prompt Templates

The prompt templates referenced by Agentforce Sales Coach contain key details and instructions our agent requires to coach reps. It includes CRM data about the object record (or records), criteria to assess the rep on, and provides guidance on how to generate and organize the feedback for the user.

Agentforce Sales Coach has a dedicated prompt template type called Sales Coaching that you must use for scenarios.

Role-Play Topic Customization for Agentforce Sales Coach

Edit the agent topics associated with each role-play scenario to customize how Agentforce Sales Coach conducts itself in role-play scenarios.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

The screenshot shows the Agentforce Builder interface with the 'Topic Details' page open. The left sidebar has a 'Topics' tab selected. The main area shows a topic configuration for 'Agentforce Sales Coach: Negotiation/Review Role-Play'. Key fields include:

- Name:** Agentforce Sales Coach: Negotiation/Review Role-Play
- Classification Description (1):** Role-plays related to deals in the negotiation stage where you are a prospective buyer speaking with a Sales Executive on topics such as pricing and other contract terms, such as contract length, units, services, and more.
- API Name:** NegotiationRolePlay
- Scope (2):** Your only job is to negotiate with the user, who is a Sales Executive, while roleplaying as a prospective buyer, attempting to get the best deal for your company by negotiating the terms of the deal, such as contract term length, units, price, or other benefits and add-ons, presenting counteroffers and focusing on numbers and facts, and resisting attempts by the Sales Executive to change the terms of the deal in a way that would be more costly to you and your company.
- Instructions (3):**
 - Always respond as a prospective buyer in this interaction.
 - Never make a direct reference to the system data you have received.
 - When the Sales Executive ends the conversation, respect that by politely concluding the conversation and say "Goodbye".

A 'Conversation Preview' window on the right shows a cartoon character and a message: 'Let's chat! Hi! I'm your helpful bot.'

Agentforce Sales Coach conducts role-play sessions with reps using an agent topic. In these role-plays, the interaction with Agentforce Sales Coach is intended to simulate an interaction or conversation with a current or prospective customer or team member. The agent topic shapes how the agent responds during each role-play session and makes sure each session and interaction aligns with your instructions and business goals. Agent topics include a classification description, scope, and instructions. Each field plays a different role in defining how the agent functions in role-play scenarios.

Classification Description

Every agent topic requires a Classification Description (1). This description is one to three sentences that describe what the topic does and the types of user requests that must be classified into this topic. Agentforce Sales Coach uses this description to determine when to use a topic in a conversation. When a rep begins their role-play, the agent identifies the user's intent, compares it to the topic name and classification description, and uses the best matching topic.

Scope

In addition to a classification description, topics also require a Scope (2). This scope is a description used by the LLM to define what the agent is responsible for within the topic. Edit the scope provided to reflect the business context of the role-play and the role and characteristics you want the agent to demonstrate during the role-play. Or, if the agent isn't responding in a way that is consistent with a prospective or current customer.

Instructions

Instructions (3) are a key component of agent topics and help the agent make decisions about how to

use the actions in a topic for different use cases. Each Agentforce Sales Coach topic comes with numerous instructions we provide for the agent. These instructions shape how the agent responds during each scenario and make sure each interaction aligns with your specific business goals. Instructions can include role and behavioral customization, conversational boundaries, handling complex scenarios, mentioning competitors or common service issues.

Here are some examples of how we've set up Agentforce Sales Coach instructions for the Sales Opportunity object. You can modify these instructions to best meet your business needs and objectives when training your reps.

- Always respond as a prospective buyer in this interaction.
- If the sales executive asks you to perform a task or action not related to the sales conversation, respond with "I do not believe that is relevant to this discussion."
- Never offer to help the sales executive.
- When asked to start the negotiation, always respond first to the sales executive with "Hello, I am glad we could connect today and I'm ready to discuss this deal." If you have already said this in conversation history, don't repeat yourself.
- When the sales representative ends the conversation, respect that and say "goodbye."
- Never respond with the same response.
- If you determine you're unable to respond, ask the sales executive to rephrase their question. Never say "Sorry, I am unable to assist with that."
- Never break character from the prospective buyer.
- Never make a direct reference to the system data you've received.
- Conduct the conversation as a live, spoken conversation between business professionals.

Review the provided instructions in each topic for Agentforce Sales Coach and verify if they align with your goals for the agent and the coaching it provides. Consider adding new topic instructions to:

- Further customize the agent's role and behavior.
- Add conversational boundaries.
- Instruct the agent on how to handle complex behaviors.
- Mention competitors to drive better pricing discussions.

 **Note** You can't associate actions with standard Role-Play topics (Negotiation/Review Role-Play and Proposal Quote Role Play). Actions are supported only for Feedback topics. If you create a custom topic that includes actions, Agentforce Sales Coach treats it as a Feedback topic.

 **Note** The prebuilt role-play topics serve as templates that you can customize as you create your own coaching scenarios that reflect your business and customer interactions. Additionally, they serve as best practices as you build your own coaching scenarios with role-plays.

See Also

[Agent Topics](#)

[Edit a Standard Topic](#)

[Use Cases for Customizing Agentforce Sales Coach](#)

Feedback Customization for Agentforce Sales Coach

Modify the feedback Agentforce Sales Coach generates so it better aligns to your organization and rep's needs.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

Agentforce Sales Coach uses actions and prompt templates to analyze a rep's presentation and role-play session, and generate feedback. Each scenario has an associated action and prompt template. Agentforce Sales Coach actions must have Prompt Template as the Reference Action Type.

To edit a standard prompt template that Agentforce Sales Coach comes with, use Prompt Builder. When you edit a prompt template, a new version of the standard prompt is created.

Agentforce Sales Coach prompt templates include these aspects:

- CRM data (referred to as Resources in Prompt Builder)
- Instructions that articulate
 - Setting
 - User guidance
 - Structure of the feedback for the end user
- Input: Reference object
- Input: Transcript
- Retriever (optional)

Before you begin customizing a prompt template, review each section of the prompt template to understand their function and requirements. Then, decide what you want to modify and what section it falls under. We recommend making one change at a time and thoroughly testing it before making more customizations.

For more information on Prompt Builder, see [Prompt Builder](#).

CRM Data

Prompt templates reference CRM data for the object the scenario supports. This data is necessary for the agent to receive context during the scenario, evaluate the sales rep's pitch, check it for accuracy, and generate feedback that aligns with the object associated with the scenario. Here's an example of how CRM Data is included in a prompt template.

```
You are a Sales Manager coaching Sales Executive {!$User.FirstName}  
They are working on a deal with Customer: {!$Input:Opportunity.Account.Name}  
The deal is currently in stage {!$Input:Opportunity.StageName}
```

Here is relevant context on this OpportunityId that should be considered
Industry of the Customer: {!\$Input:Opportunity.Account.Industry}
This opportunity is stage: {!\$Input:Opportunity.StageName}
Customer Business Description: {!\$Input:Opportunity.Account.Description}
If there are tasks to be completed by the Sales Executive that are overdue, the task will = true: {!\$Input:Opportunity.HasOverdueTask}

Instructions

Instructions tell the agent what they're responsible for doing with the information provided in a given scenario. Here's an example of how instructions are included in a prompt template.

Coach {!\$User.FirstName} based on: the customer's business description, the opportunity's current stage, context about the opportunity and the customer, and the coaching opportunity and coaching task . Assess the Sales Executive's understanding of the MEDDIC framework, and their ability to complete the QUALIFICATION_CHECKLIST outlined below.

Feedback

The feedback section instructs the agent on the different criteria and sections to include when it's generating feedback. Each feedback section includes a short description and information about how the agent must provide feedback for that section. The section names defined in the prompt template are also used in the UI when the rep receives their feedback.

For example:

- Feedback for sales pitch scenarios is sectioned into: deal summary, feedback, needs attention, and next steps.
- Feedback for role-play scenarios is sectioned into deal summary, overall impression, feedback, needs attention, and next steps.

Edit, add, or delete sections to align with your organization's specific needs and objectives for your reps. To format the output, include the correct markup in your prompt template. See [Agentforce Sales Coach Feedback](#) for a sample feedback criteria specific to the Sales Opportunity object.

Here's an example.

In the feedback you provide, include the following
Deal Summary
In 100 words or less provide a summary of the deal in complete sentences. Include in this order: the stage; customer name; amount found here: {!\$Input:Oppo

```
rtunity.Amount}; and if provided, the {!$Input:Opportunity.Probability} likelihood to close.
```

#Key Strengths

Summarize what the Sales Executive did well in applying MEDDIC principles and completing the QUALIFICATION_CHECKLIST. Provide specific examples from the sales executive's transcript.

#RAG

You must summarize the RAG output in readable format and put in output under R AG header: {!\$EinsteinSearch:File_Agentforce_Sales_Coach_Library_1733_1Cx_9fx8 2f1bfcc.results}

#Areas for Improvement

Identify specific aspects of the QUALIFICATION_CHECKLIST where the Sales Executive could improve. Provide specific examples from the sales executive's transcript.

#Next Steps

Provide an unordered list of a minimum of two, no more than four, tactical next steps the Sales Executive should focus on given the feedback provided.

After the list you need to evaluate if a Next Step has been provided in the system by the Sales Executive. State whether a next step has been identified here: {!\$Input:Opportunity.NextStep}. When none is provided, remind them that Next Steps are important because they help Sales Executives manage their own deals and provide visibility for sales managers.

If a Next Step has been provided in the system, add the sentence: "Next Step you have identified is: {!\$Input:Opportunity.NextStep}". Then evaluate whether the Sales Executive has defined the next step {!\$Input:Opportunity.NextStep} adequately, compared to what you think should be the next step and the stage of the deal.

You must write your response in the Second-person narrative, using "you", "you" to give a sense of familiarity. Your feedback must not exceed 400 words. Be concise in your instructions and keep them actionable for a Sales Executive.

Transcript

The prompt template must reference the transcript from the presentation or role-play scenario for the agent to generate feedback. Here's an example of how a transcript is referenced in the prompt template.

```
Here's the Transcript: {!$Input:Transcript}
```

Retriever

This is an optional section that you can add to a prompt template to ensure that agent's feedback aligns with your organization's sales methodology, objection handling techniques, playbooks, service agreements, and other key resources. You can [add grounding details in the prompt](#) using Agentforce

Digital Library.

See Also

- [Override a Standard Prompt Template](#)
- [Agentforce Sales Coach Feedback](#)

Testing Agentforce Sales Coach Customizations Before Deployment

Make sure that any customizations you make to Agentforce Sales Coach are operating as expected by thoroughly testing each one.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce Sales Coach add-on.

[Test Your Role-Play Customization for Agentforce Sales Coach](#)

Verify that the customizations made to Agentforce Sales Coach in role-play scenarios are operating as expected before deploying those changes.

[Test Your Feedback Customization for Agentforce Sales Coach](#)

Verify that the customizations you made to Agentforce Sales Coach feedback are operating as expected before deploying the changes to your reps.

[Sample Transcripts for Agentforce Sales Coach](#)

Copy and paste these sample transcripts into Prompt Builder and Agent Builder when testing any customizations made to Agentforce Sales Coach.

Test Your Role-Play Customization for Agentforce Sales Coach

Verify that the customizations made to Agentforce Sales Coach in role-play scenarios are operating as expected before deploying those changes.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions.

USER PERMISSIONS NEEDED

To customize and test role-play scenarios: [Manage Agentforce Sales Coach](#)

1. From Agentforce Studio, click **Agentforce Sales Coach**.
2. Click **Open in Builder**.
3. Select **Topics** from the sidebar menu.

- In the Conversation Preview chat box, type an utterance to initiate the role-play scenario.
- Here's an example utterance specific to a coaching scenario for a role-play in the context of an Opportunity record.

Utterance: "Let's do a role-play. The customer account name is Virtuoso. The sales executive's name is Samatha. The opportunity stage is negotiation and the opportunity amount is \$52,000."

The agent identifies the best topic to select and responds based on the instructions within the topic.

- Have a back-and-forth conversation with the agent as if you're in a negotiation role-play.
- Review the agent's responses and see whether they align with your expectations for the scenario you're testing.

The screenshot shows the Agent Builder interface with the following details:

- Topic Details:**
 - Session Start:** Session Started: Feb 10, 2026, 10:37 AM PST; Session ID: c38d5531-f388-46a8-baa6-fa2eb4dd94f
 - User Prompt:** "Let's do a role-play. The customer account name is Virtuoso. The sales executive's name is Samatha. The opportunity stage is negotiation and the opportunity amount is \$52,000."
 - Select Topic:** # Negotiation Role Play (NegotiationRolePlay)
 - Instructions:**
 - Always respond as a prospective buyer in this interaction.
 - Never make a direct reference to the system data you have received.
 - When the Sales Executive ends the conversation, respect that politely.
- Conversation Preview:**
 - Agent Response:** "Hello, I am glad we could connect today and I am ready to discuss this deal."
 - Chat History:**
 - Hil I'm your helpful bot.
 - Let's do a role-play. The customer account name is Virtuoso. The sales executive's name is Samatha. The opportunity stage is negotiation and the opportunity amount is \$52,000.
 - Hello, I am glad we could connect today and I am ready to discuss this deal.
 - Input Field:** "Describe your task or ask a question..."

- Review the Plan Tracer to see how the agent thinks. It helps you troubleshoot if your agent is going off-topic and not using the role-play topic for the whole conversation.

Continue customizing and testing the agent until the agent's responses are consistent with your expectations.

See Also

[Role-Play Topic Customization for Agentforce Sales Coach](#)

Test Your Feedback Customization for Agentforce Sales Coach

Verify that the customizations you made to Agentforce Sales Coach feedback are operating as expected before deploying the changes to your reps.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer Editions** with **Foundations or Agentforce 1 Editions**.

USER PERMISSIONS NEEDED

To customize and test Agentforce Sales Coach: Manage Agentforce Sales Coach

1. In Prompt Builder, select the prompt template you customized and want to test.
2. Click the Preview Settings icon.
3. Paste a [sample transcript](#) in the Transcript text box.
4. Enter and select an object record to test on.
5. Click **Preview**.
6. Review the feedback in the Generated Response section for accuracy.

Sample Transcripts for Agentforce Sales Coach

Copy and paste these sample transcripts into Prompt Builder and Agent Builder when testing any customizations made to Agentforce Sales Coach.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

Scenario: Sales Pitch Coaching for Opportunities in the Qualification Stage

-  **Example :** I'm currently working on a deal with a company called Open Source Inc. This deal is valued at \$5,000. Open Source Inc. is a mid-sized company that has been using a highly customized CRM system for several years. Over time, their CRM has become integral to their operations, but due to the extensive customizations, they are facing significant challenges in maintaining and updating it. They don't have the in-house expertise required to manage these updates effectively. Their primary need is to make several critical updates to their CRM. These updates are essential for them to maintain operational efficiency and to ensure that their CRM continues to support their business processes effectively. Given their tight budget constraints, they have identified only the must-do enhancements that need immediate attention. These enhancements are crucial for their day-to-day operations and cannot be deferred. Open Source Inc. has a very tight budget, which limits their ability to undertake all the desired updates. They have a fixed budget of \$5,000 for these services. The CRM has been customized extensively over the years, making it challenging to implement updates without thorough understanding and careful planning. They lack the necessary technical expertise on their team to manage and execute these updates, which is why they are seeking our services. We have proposed a comprehensive service package within their budget of \$5,000. Our approach involves: Needs Assessment: Conducting a detailed needs assessment to prioritize the must-do enhancements. Developing customized solutions that address the identified needs while taking into account the existing customizations of their CRM. Our team's expertise in CRM management and customization will be pivotal in this process. By addressing the critical updates, we will enhance the functionality of their CRM, ensuring it continues to support their business processes efficiently. With the necessary updates, Open Source Inc. can expect improved

operational efficiency, reducing the time and effort required to manage their CRM. Our solution provides a cost-effective way for them to address their immediate needs without exceeding their budget. This deal represents a valuable opportunity for us to showcase our expertise in CRM customization and support. By delivering high-quality, cost-effective solutions, we can strengthen our relationship with Open Source Inc. and potentially open the door for future collaboration on more extensive projects as their budget allows. I'm confident that with our team's expertise and the tailored approach we've developed, we can meet Open Source Inc.'s needs effectively and help them achieve their goals within their budget constraints.

Scenario: Sales Pitch Coaching for Opportunities in the Needs Analysis Stage

 **Example :** I wanted to update you on a promising deal I'm working on with Amptech Corporation. The deal is for \$3,000 worth of goods, specifically our high-capacity batteries. Amptech Corporation is a leading player in the electronics industry, currently seeking high-capacity batteries for their new line of portable devices. They require batteries that offer high capacity and reliable performance, and they need a supplier who can deliver quality and consistency. We have met with the Customer for extensive listening sessions to learn about how their company operates and the things that matter to them. Our high-capacity batteries are an excellent match for Amptech's needs. They provide the performance and reliability that Amptech is looking for in their new product line. Additionally, our pricing is slightly more competitive than Batteries Are Us, a company we often compete against. This gives us a significant edge as Amptech is keen on maximizing their budget while ensuring they don't compromise on quality. Our reputation for delivering high-quality products consistently is another factor that works in our favor. Amptech values quality and reliability, and our track record aligns well with their expectations. We have proposed a package of high-capacity batteries worth \$3,000. This package not only meets their technical requirements but also offers them better value compared to our main competitor. Our proposal highlights the battery specifications, including detailed information on the battery's capacity, performance metrics, and compatibility with their new product line. We also provided a cost-benefit analysis showing the cost-effectiveness of choosing our batteries over those from Batteries Are Us, as well as assurances on timely delivery and ongoing support to ensure smooth integration and optimal performance of the batteries in their products. This \$3,000 deal with Amptech Corporation represents a significant opportunity for us to expand our footprint in the electronics sector. By providing a high-quality product at a competitive price, we can establish a strong relationship with Amptech, paving the way for potential future collaborations. I'm confident that our proposal meets Amptech's needs effectively and positions us as their preferred supplier over Batteries Are Us.

Scenario: Role-Play for Opportunities in the Proposal and Pricing Quote Stage

 **Example :** **Rep:** Hi Taylor, thanks for taking the time to meet with me today. How have you been?**Buyer:** Hi Alex, I'm doing well, thank you. Ready to discuss the proposal you sent over.**Rep:** Great to hear. So, where would you say you are in the buying cycle for

CyberGuard?**Buyer:** We're at the stage where we're seriously evaluating your proposal and comparing it with a couple of other solutions. We're hoping to make a decision within the next few weeks.**Rep:** That's good to know. Could you walk me through your process for generating purchase orders once you decide on a solution?**Buyer:** Sure. After the evaluation phase, we need to get approval from our finance and procurement departments. Once they sign off, we generate the purchase order. This usually takes about two to three weeks.**Rep:** Understood. And who are the key decision-makers involved in this process?**Buyer:** The primary decision-makers are our CFO, Jane, and our Head of IT, Mark. Jane handles the financial aspect, while Mark is more concerned with the technical fit and security features.**Rep:** Thanks for clarifying. Have you had a chance to add Jane and Mark to the opportunity in our system?**Buyer:** Yes, I have. Both Jane and Mark have been reviewing the proposal and have raised some questions which I hope we can address today.**Rep:** Perfect. Speaking of which, how can I best communicate the value of CyberGuard to Jane and Mark? Are there specific concerns or priorities they have?**Buyer:** Jane is very focused on the ROI and cost savings, while Mark is more interested in the technical robustness and integration with our existing systems. Can you explain how CyberGuard stands out in these areas?**Rep:** Absolutely. For Jane, we've found that companies using CyberGuard typically see a 25% reduction in security breach costs within the first year. Additionally, our detailed ROI analysis can show projected savings over a five-year period. Would that be beneficial for her?**Buyer:** Yes, that's very helpful. Could you share a bit more about the ROI specifics? How exactly does CyberGuard help in reducing breach costs?**Rep:** Certainly. CyberGuard uses advanced threat detection and response mechanisms that identify and mitigate potential breaches before they can cause significant damage. This proactive approach minimizes downtime and data loss, leading to substantial cost savings. We also offer a comprehensive support package that ensures any issues are resolved swiftly, reducing the financial impact of any incidents.**Buyer:** That makes sense. And for Mark, what specific technical advantages does CyberGuard offer over other solutions?**Rep:** For Mark, I can highlight several key features. CyberGuard integrates seamlessly with existing IT infrastructures, requiring minimal adjustments. Our platform uses machine learning to continuously adapt to new threats, ensuring state-of-the-art protection. Additionally, we provide detailed analytics and reporting tools that help IT teams stay ahead of potential risks. Would it be useful for Mark to see a technical deep-dive and case studies that demonstrate these benefits?**Buyer:** Yes, he would definitely be interested in that. What about the trial period you mentioned?**Rep:** We offer a free trial period where Mark can test the platform in your environment. This allows him to evaluate the integration and effectiveness of CyberGuard firsthand before making a commitment.**Buyer:** That sounds promising. Has the ROI been quantified for our specific use case yet?**Rep:** We've started the process, but I'd like to work closely with you to ensure we're capturing all the relevant data points. Could we set up a meeting next week to go through the specifics together?

Scenario: Role-Play for Opportunities in the Negotiation Stage



Example : **Rep:** Hi Taylor, thanks for taking the time to meet with me today. How are things on your end?**Buyer:** Hi Alex, I'm doing well, thank you. Ready to dive into the negotiations for the High Capacity Batteries.**Rep:** Great to hear. Before we get started, have all the key decision makers within your company given their support for this deal?**Buyer:** Yes, everyone is on board,

but we're looking for the best possible terms before we finalize anything.**Rep:** Understood. In terms of pricing, we've offered a 10% discount on your initial order. Would that help in making the deal more attractive for your team?**Buyer:** A discount is definitely appreciated, but we're hoping for a bit more, given the volume we're planning to purchase. Can you do better on the price?**Rep:** I understand where you're coming from. Given the volume you're considering, I can propose an additional 5% discount for orders above a certain threshold. Would that be acceptable?**Buyer:** That's a good start, but we're also concerned about the long-term cost. Can we discuss a tiered pricing structure for future orders?**Rep:** Absolutely. We can implement a tiered pricing model that offers greater discounts as your order volume increases over time. This way, you benefit from better pricing as your needs grow. **Buyer:** That's promising. We also had some concerns about the battery lifespan and warranty. Have those been addressed?**Rep:** Yes, I recall those concerns. Our batteries come with a 5-year warranty, and we offer comprehensive support throughout that period. Additionally, our latest models have improved lifespans, typically lasting 20% longer than industry standards. Does this address your concerns?**Buyer:** It does, but we'd like some form of guarantee or performance metric included in the contract to ensure we're covered.**Rep:** We can certainly include performance guarantees in the contract. We can also set up regular reviews to ensure the batteries are meeting your expectations. How does that sound?**Buyer:** That's reassuring. One last thing, what kind of training and support will we receive post-purchase?**Rep:** We offer full training sessions for your team, both on-site and online, to ensure they are fully equipped to handle the batteries. Our support team is available 24/7 for any issues that might arise. Additionally, we provide detailed documentation and troubleshooting guides.**Buyer:** That's good to know. It seems like we're getting closer to a deal. With the additional discount and the performance guarantees, I think we're in a better place. Can you send over an updated proposal reflecting these changes?**Rep:** Absolutely, Taylor. I'll have the updated proposal sent to you by the end of the day. Is there anything else you'd like to discuss or any other concerns you have?**Buyer:** No, I think we've covered the main points. Thanks for being flexible, Alex. Looking forward to seeing the revised proposal.**Rep:** Great, thank you for your time, Taylor. I'll be in touch soon.**Buyer:** Bye, Alex.**Rep:** Bye, Taylor.

Use Cases for Customizing Agentforce Sales Coach

View common examples of how to customize Agentforce Sales Coach to meet your business goals.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

[Preparing Reps to Handle Your Specific Competitors with Agentforce Sales Coach](#)

View an example of how to configure Agentforce Sales Coach so it can help your reps effectively differentiate your product from competitors and highlight the unique value you bring to the market.

[Aligning Agentforce Sales Coach Feedback to Your Sales Methodology](#)

View an example of how to customize a prompt template so Agentforce Sales Coach can provide feedback using a sales methodology such as MEDDIC or Challenger.

Making Sure Your Rep's Pitch Aligns to Your Criteria

View an example of how to customize Agentforce Sales Coach to help a sales rep deliver a pitch that highlights key value-driven keywords, aligning with customer priorities.

Preparing Your Service Reps to Handle Common Customer Calls

View an example of how to customize Agentforce Sales Coach with a coaching scenario for customer service reps.

Getting Account Managers More Comfortable with Growing Accounts

View an example of how to customize Agentforce Sales Coach with a coaching scenario for an account or client success role.

Key Points to Remember

Review these key points.

Preparing Reps to Handle Your Specific Competitors with Agentforce Sales Coach

View an example of how to configure Agentforce Sales Coach so it can help your reps effectively differentiate your product from competitors and highlight the unique value you bring to the market.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

This example uses the Get Negotiation/Review Stage Feedback prompt template. The changes made to it apply only to opportunities in the Negotiation stage. To make sure the agent can provide coaching around handling your specific competitors, apply these customizations to the other feedback prompt templates as well.

The bold text represents the parts of the prompt template that were customized for this use case.

Prompt Template



Example

```
You are a Sales Manager coaching Sales Executive {!$User.FirstName}  
They are working on a deal with Customer: {!$Input:Opportunity.Account.Name}  
The deal is currently in stage {!$Input:Opportunity.StageName}  
Your goal is to ensure the Sales Executive understands to differentiate the product from competitors and position the unique value it offers to close the deal successfully.
```

Here is relevant context on this Opportunity that should be considered

Industry of the Customer: {!\$Input:Opportunity.Account.Industry}
This opportunity is stage: {!\$Input:Opportunity.StageName}
Customer Business Description: {!\$Input:Opportunity.Account.Description}
Sales Executive Notes for this opportunity: {!\$Input:Opportunity.Description}
The expected probability percentage the deal closes: {!\$Input:Opportunity.Probability}
If there are tasks to be completed by the Sales Executive that are overdue, the task will = true: {!\$Input:Opportunity.HasOverdueTask}

Instructions: """

Coach {!\$User.FirstName} based on: the customer's business description, the opportunity's current stage, context about the opportunity and the customer, and the coaching opportunity and coaching task. **Assess how well the Sales Executive is able to have a discussion with the Customer by ensuring they are following the COMPETITOR_HANDLING_CHECKLIST mentioned below.**

<COMPETITOR_HANDLING_CHECKLIST>

Acknowledge the competitor's mention without dismissing the customer's concerns.
Highlight the key differentiators of the proposed solution over the competitor's product.
Reframe the conversation to focus on the customer's priorities and how the proposed solution addresses them better than the competition.
Handle objections confidently while maintaining professionalism.

Coaching Opportunity

The key to the Negotiation stage is whether the Sales Executive is able to have a discussion with the Customer about the competitor. The sales executive should be able to handle the competitor mention by following the COMPETITOR_HANDLING_CHECKLIST

Coaching Task

You will receive a written transcript of the Sales Executive you are coaching, having a conversation with the Customer they are trying to sell their product or service to.

In the feedback you provide, include the following

Deal Summary

In 100 words or less provide a summary of the deal in complete sentences. Include in this order: the stage; customer name; amount found here: {!\$Input:Opportunity.Amount}; and if provided, the {!\$Input:Opportunity.Probability} likelihood to close.

Key Strengths

What communication and selling techniques did the Sales Executive use well? Using specific examples from the Sales Executive's transcript, summarize what they did well in differentiating the solution from the competitor's product..

Areas for Improvement

Identify where the Sales Executive could improve, such as providing clearer differentiators or reframing the conversation more effectively. Provide specific examples from the sales executive's transcript.

Next Steps

Provide an unordered list of a minimum of two, no more than four, tactical next steps the Sales Executive should focus on given the feedback provided.

After the list you need to evaluate if a Next Step has been provided in the system by the Sales Executive. State whether a next step has been identified here: `{!$Input:Opportunity.NextStep}`. When none is provided, remind them that Next Steps are important because they help Sales Executives manage their own deals and provide visibility for sales managers.

If a Next Step has been provided in the system, add the sentence: "Next Step you have identified is: `{!$Input:Opportunity.NextStep}`". Then evaluate whether the Sales Executive has defined the next step `{!$Input:Opportunity.NextStep}` adequately, compared to what you think should be the next step and the stage of the deal.

You must write your response in the Second-person narrative, using "you", "your" to give a sense of familiarity. Your feedback must not exceed 400 words. Be concise in your instructions and keep them actionable for a Sales Executive.

~~~~~

Here's the Transcript: `{!$Input:Transcript}`

Now execute the coaching task.

## Topic Instructions

In addition to customizing the prompt template, you must add a new instruction to the Agentforce Sales Coach: Negotiation and Review Role-Play agent topic. The following example represents the new instruction added for this use case.



### Example

Mention the competitor "ClearTech" has better pricing and competitive features. Always ensure the product the seller is offering is still the right fit for you. Ask for feature comparison, and try to get a better deal.

## Aligning Agentforce Sales Coach Feedback to Your Sales Methodology

View an example of how to customize a prompt template so Agentforce Sales Coach can provide feedback using a sales methodology such as MEDDIC or Challenger.

### REQUIRED EDITIONS

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Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

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This example uses the Get Qualification Stage Feedback prompt template. The changes made to it apply only to opportunities in the Qualification/Discovery stage. To make sure the agent can provide coaching on your specific sales methodology, apply these customizations to the other feedback prompt templates as well.

The bold text represents the parts of the prompt template that were customized for this use case.



### Example

```
You are a Sales Manager coaching Sales Executive {!$User.FirstName}  
They are working on a deal with Customer: {!$Input:Opportunity.Account.Name}  
The deal is currently in stage {!$Input:Opportunity.StageName}  
Your goal is to ensure the Sales Executive understands how to qualify the deal using the MEDDIC framework to drive it toward closure.
```

```
Here is relevant context on this OpportunityId that should be considered  
Industry of the Customer: {!$Input:Opportunity.Account.Industry}  
This opportunity is stage: {!$Input:Opportunity.StageName}  
Customer Business Description: {!$Input:Opportunity.Account.Description}  
Sales Executive Notes for this opportunity: {!$Input:Opportunity.Description}  
The expected probability percentage the deal closes: {!$Input:Opportunity.Probability}  
If there are tasks to be completed by the Sales Executive that are overdue, the task will = true: {!$Input:Opportunity.HasOverdueTask}
```

Instructions: """

Coach {!\$User.FirstName} based on: the customer's business description, the opportunity's current stage, context about the opportunity and the customer, and the coaching opportunity and coaching task. **Assess the Sales Executive's understanding of the MEDDIC framework, and their ability to complete the QUALIFICATION\_CHECKLIST outlined below:**

**<QUALIFICATION\_CHECKLIST> i**

**Identify the Economic Buyer and their priorities.**

**Define the customer's decision criteria and ensure alignment with the proposed solution.**

**Map the customer's decision process and identify any gaps.**

**Address potential pain points effectively.**

**Provide measurable metrics to demonstrate the value of the solution.**

**Coaching Opportunity**

**The key to the Qualification stage is ensuring the Sales Executive understands the MEDDIC methodology and can confidently address the points in the QUALIFICATION\_CHECKLIST to progress the deal.**

**Coaching Task**

You will receive a written transcript of the Sales Executive summarizing their understanding of the buyer and the opportunity.

In the feedback you provide, include the following

**# Deal Summary**

In 100 words or less provide a summary of the deal in complete sentences. Include in this order: the stage; customer name; amount found here: {!\$Input:Opportunity.Amount}; and if provided, the {!\$Input:Opportunity.Probability} likelihood to close.

**# Key Strengths**

**Summarize what the Sales Executive did well in applying MEDDIC principles and completing the QUALIFICATION\_CHECKLIST. Provide specific examples from the sales executive's transcript.**

**# Areas for Improvement**

**Identify specific aspects of the QUALIFICATION\_CHECKLIST where the Sales Executive could improve. Provide specific examples from the sales executive's transcript.**

**# Next Steps**

Provide an unordered list of a minimum of two, no more than four, tactical next steps the Sales Executive should focus on given the feedback provided.

After the list you need to evaluate if a Next Step has been provided in the system by the Sales Executive. State whether a next step has been identified here: `{!$Input:Opportunity.NextStep}`. When none is provided, remind them that Next Steps are important because they help Sales Executives manage their own deals and provide visibility for sales managers.

If a Next Step has been provided in the system, add the sentence: "Next Step you have identified is: `{!$Input:Opportunity.NextStep}`". Then evaluate whether the Sales Executive has defined the next step `{!$Input:Opportunity.NextStep}` adequately, compared to what you think should be the next step and the stage of the deal.

You must write your response in the Second-person narrative, using "you", "your" to give a sense of familiarity. Your feedback must not exceed 400 words. Be concise in your instructions and keep them actionable for a Sales Executive.

~~~~

Here's the Transcript: `{!$Input:Transcript}`

Now execute the coaching task.

No changes to the topic instructions are necessary for this use case.

Making Sure Your Rep's Pitch Aligns to Your Criteria

View an example of how to customize Agentforce Sales Coach to help a sales rep deliver a pitch that highlights key value-driven keywords, aligning with customer priorities.

REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

This example uses the Get Qualification Stage Feedback prompt template. The changes made to it apply only to opportunities in the Qualification/Discovery stage. To make sure the agent can provide sales reps with coaching on specific terminology and messaging, apply these customizations to the other feedback prompt templates, as required.

The bold text represents the parts of the prompt template that were customized for this use case.



Example

You are a Sales Manager coaching Sales Executive {!\$User.FirstName}
They are working on a deal with Customer: {!\$Input:Opportunity.Account.Name}

The deal is currently in stage {!\$Input:Opportunity.StageName}.

Your goal is to ensure the Sales Executive delivers a product pitch that effectively integrates key value-driven keywords that resonate with the customer's needs and priorities.

Here is relevant context on this Opportunity that should be considered
Industry of the Customer: {!\$Input:Opportunity.Account.Industry}
This opportunity is stage: {!\$Input:Opportunity.StageName}
Customer Business Description: {!\$Input:Opportunity.Account.Description}
Sales Executive Notes for this opportunity: {!\$Input:Opportunity.Description}

The expected probability percentage the deal closes: {!\$Input:Opportunity.Probability}

If there are tasks to be completed by the Sales Executive that are overdue, the task will = true: {!\$Input:Opportunity.HasOverdueTask}

Instructions: "'''

Coach {!\$User.FirstName} based on: the customer's business description, the opportunity's current stage, context about the opportunity and the customer, and the coaching opportunity and coaching task. **Assess how well the Sales Executive is able to incorporate the <KEY_VALUE_KEYWORDS> mentioned below, into their pitch.**

<KEY_VALUE_KEYWORDS>

Scalability

Cost savings

Customizable dashboards

Predictive insights

ROI optimization

Coaching Opportunity

The key to the Qualification stage is whether the Sales Executive is able to pitch the product by mentioning the <KEY_VALUE_KEYWORDS>.

Coaching Task

You will receive a written transcript of the Sales Executive summarizing their understanding of the buyer and the opportunity.

In the feedback you provide, include the following

Deal Summary

In 100 words or less provide a summary of the deal in complete sentences. Included in this order: the stage; customer name; amount found here: {\$Input:Opportunity.Amount}; and if provided, the {\$Input:Opportunity.Probability} likelihood to close.

Key Strengths

Highlight areas where the Sales Executive effectively incorporated the <KEY_VALUE_KEYWORDS> and aligned their pitch with the customer's priorities. Provide specific examples from the sales executive's transcript.

Areas for Improvement

Identify where the Sales Executive could improve the integration of <KEY_VALUE_KEYWORDS>. Provide specific examples from the sales executive's transcript and how they can be improved to strengthen the pitch.

Next Steps

Provide an unordered list of a minimum of two, no more than four, tactical next steps the Sales Executive should focus on given the feedback provided.

After the list you need to evaluate if a Next Step has been provided in the system by the Sales Executive. State whether a next step has been identified here: {\$Input:Opportunity.NextStep}. When none is provided, remind them that Next Steps are important because they help Sales Executives manage their own deals and provide visibility for sales managers.

If a Next Step has been provided in the system, add the sentence: "Next Step you have identified is: {\$Input:Opportunity.NextStep}". Then evaluate whether the Sales Executive has defined the next step {\$Input:Opportunity.NextStep} adequately, compared to what you think should be the next step and the stage of the deal.

You must write your response in the Second-person narrative, using "you", "your" to give a sense of familiarity. Your feedback must not exceed 400 words. Be concise in your instructions and keep them actionable for a Sales Executive.

~~~~

Here's the Transcript: {\$Input:Transcript}

Now execute the coaching task.

No changes to the topic instructions are necessary for this use case.

## Preparing Your Service Reps to Handle Common Customer Calls

View an example of how to customize Agentforce Sales Coach with a coaching scenario for customer service reps.

### REQUIRED EDITIONS

Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.



**Note** This is an illustrative example to show how you can customize coaching scenarios using Agentforce Sales Coach. Be sure to thoroughly test and validate any customization before deploying it in your org.

This example uses the Case object with a role-play topic, feedback topic, feedback action, and a prompt template.

### Business Use Case

Instead of passively shadowing calls, the customer service rep is given a chance to practice troubleshooting with a customer on a common case issue. Similarly, you can also use Agentforce Sales Coach to upskill a rep to handle more advanced cases.

To achieve this use case, create a coaching scenario with the necessary components.



#### Example

**Object:** Case

**Scenario Description:** This is a role-play for Customer Service Representatives to prepare to help Customers with a common challenge. This scenario helps you practice handling challenging conversations while staying calm, clear, and solution-focused. It's important because how you respond in these moments directly impacts customer satisfaction and trust.

**User Guidance:**

Did you clearly explain the common reasons a {common issue} might be occurring?

Did you demonstrate empathy and take ownership of resolving the issue?

Did you provide clear, relevant steps the customer could take to improve v

isibility or fix the issue?

Did you leave the customer with a sense of confidence and next steps?

**Scenario type:** Role-Play

**Feedback Prompt:**

**Prompt Template Type:** Sales Coaching

**Inputs:** Case, Transcript

You are a Manager for Customer Service Representative {!\$User.FirstName}. They recently handled a customer support call regarding the [common customer issue]. The customer {!\$Input:Case.SuppliedCompany} contacted support because they were not satisfied with the product. . .

You need to help coach {!\$User.FirstName} on how effectively they managed the support interaction, identified the root cause of the issue, and guided the customer to a resolution.

Here is additional relevant context about the case:

Case Status: {!\$Input:Case.Status}

Priority of case: {!\$Input:Case.Priority}

Reason for the case: {!\$Input:Case.Subject}

**Instructions:**

Coach {!\$User.FirstName} based on the support transcript and case details provided. Evaluate how well they addressed the customer's concern and how effectively they guided the customer through troubleshooting steps related to [common customer issue]. Use the SUPPORT\_QUESTIONS below to inform your evaluation.

During job visibility support calls, a CSR should help the customer understand what factors may be creating the [common customer issue] and provide clear, actionable guidance to resolve the issue.

<SUPPORT\_QUESTIONS>

Did the CSR clearly explain the common causes of [common customer issue]?

Did the CSR demonstrate empathy and take ownership of resolving the issue?

Did the CSR provide clear, relevant steps the customer could take to improve or fix [common customer issue]??

Did the CSR leave the customer with a sense of confidence and next steps?

# Overall Impression

Based on the transcript, state whether you believe the CSR successfully identified the cause of the issue and helped the customer take meaningful next steps. Directly quote the CSR's words that influenced your assessment.

# Key Strengths

What did the CSR do well in terms of communication, ownership, and technical guidance? Include 2-3 sentences with specific examples of how the custo

mer responded or how the CSR handled objections or confusion.

#### # Areas for Improvement

Where could the CSR have been more effective? Identify any missed opportunities to educate the customer or clarify next steps. Use transcript evidence to support your feedback.

#### # Additional Resources

Suggest any help documentation or information that might be relevant to the issue and the CSR should review that can be found on: [public help website or configure a retriever to reference content in the Data Library]] Write your response in second-person narrative, using "you" and "your" to speak directly to the CSR. Keep your feedback under 400 words and focus on clear, practical guidance that supports skill growth and excellent customer experience.

Here's the Transcript: {!\$Input:Transcript}

Now execute the coaching task.

## Getting Account Managers More Comfortable with Growing Accounts

View an example of how to customize Agentforce Sales Coach with a coaching scenario for an account or client success role.

### REQUIRED EDITIONS

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Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

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**Note** This is an illustrative example to show how you can customize coaching scenarios using Agentforce Sales Coach. Be sure to thoroughly test and validate any customization before deploying it in your org.

This example uses the Account object with a role-play topic, feedback topic, feedback action, and a prompt template.

### Business Use Case

Account Managers often hesitate to go beyond their main point of contact. In this use case, an Account Manager is given a chance to practice via a role-play, having a conversation in which they lead with curiosity.

To achieve this use case, create a coaching scenario with the necessary components.



## Example

**Scenario Title:** Expand existing accounts - find the whitespace.

**Object:** Account

**Scenario Description:** This role-play scenario helps Account Managers have a conversation to identify whitespace within an account.

**User Guidance:** Be sure to start the conversation with a clear statement about how our solution is currently driving value for the Customer. Practice asking targeted questions. Demonstrate curiosity. Don't forget to have a clear follow-up to the conversation.

**Scenario type:** Role-Play

**Prompt Template Type:** Sales Coaching

**Inputs:** Account, Transcript

## Key Points to Remember

Review these key points.

### REQUIRED EDITIONS

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Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

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- Make sure the User Guidance is reflected in the prompt instructions so that the evaluation and feedback are inline with what the reps are demonstrating.
- The role-play topic must reflect the customer or buyer persona and include any customizations related to competitive mentions, demeanor, and so on.
- The role-play topic must clearly articulate in the classification description, scope the nature of the conversation, and the role of the agent (such as playing the part of a prospective buyer).

## Track Agentforce Sales Coach Usage

Create a report on the Task object to track the Agentforce Sales Coach usage metrics.

### REQUIRED EDITIONS

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Available in: Lightning Experience in **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions.

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Every coaching session a user completes and the feedback that they get from Agentforce Sales Coach on an opportunity is logged as a task with the subject line, Agentforce Sales Coach Feedback. To create a report, perform these steps.

1. From the Reports page, click **New Report**.
2. On the Create Report window, select the category as All.
3. In the Search Report Types box, enter *Task*, and then select **Tasks and Events**.
4. Click **Start Report**.
5. Add these columns and filters to the report.
  - Columns:
    - Date: Specifies the date the coaching session happened
    - Subject: Specifies what type of coaching the user took
    - Related To: Specifies the related object
    - Company/Account: Specifies the associated Account
    - Assigned: User who took the coaching session
  - Filter: To ensure that only Coach-related tasks are included in the report, add these values to the filter.
    - Field: Subject
    - Operator: Contains
    - Value: Agentforce Sales Coach Feedback
  - To see the number of coaching sessions each user has taken, consider grouping by Assigned. Further, to see the number of coaching sessions each user took on each opportunity, consider grouping by Opportunity.
6. Click **Run**.

## Agentforce (Default) for Sales Setup

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Agentforce (Default) topics and actions related to sales are designed to help sellers effectively manage deals, handle deal closures, explore conversations, stay on top of customer communication, and forecast sales revenue. Each action is mapped to one or more topics.

### REQUIRED EDITIONS

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Available in: Lightning Experience

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Available in: **Enterprise, Performance, and Unlimited Editions** with the Einstein for Sales add-on

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### USER PERMISSIONS NEEDED

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To set up Sales actions:

Manage Agentforce Default Agent

OR

Customize Application

OR

Modify Metadata

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 **Tip** Check out this feature in Salesforce Go! Find a guided setup experience, explore more content, discover related features, and monitor feature usage. See [Discover and Set Up Features With Salesforce Go](#).

| topic       | action              | Functionality                                                                                                                                                                                                                                                                          | Additional user permissions needed | Prerequisite features                              | notes |
|-------------|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|----------------------------------------------------|-------|
| Close Deals | Create Close Plan   | Create Close Plan helps reps achieve their quotas by providing AI-generated plans that include advice and steps for closing deals. Close plans include data from records related to a specific opportunity, so the steps are personalized to the customer and the rep's sales process. | Close Plan                         | Einstein Generative AI<br><br>Agentforce (Default) |       |
|             | Get Product Pricing | Get Product Pricing shows the pricing information for a product, including relevant historical data from previous deals involving the same product.                                                                                                                                    |                                    | Einstein Generative AI<br><br>Agentforce (Default) |       |

| topic                      | action                                  | Functionality                                                                                                                                                                                                                                                                                           | Additional user permissions needed | Prerequisite features                                                                  | notes                                                                                                                                                                                                             |
|----------------------------|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Conversation Explorer      | <a href="#">Explore Conversation</a>    | Explore Conversation answers a user's questions about a voice or video call based on the call transcript. For example, if the user enters "What was the customer sentiment on the call?" in the Agentforce panel, the agent delivers an answer based on the customer's language in the call transcript. | Einstein Sales Call Explorer       | Einstein Generative AI<br>Agentforce (Default)<br>Einstein Conversation Insights (ECI) | <a href="#">Required setup</a><br><br>The Explore Conversation agent can't answer a user's question about a voice call that's identified by name.                                                                 |
| Communicate with Customers | <a href="#">Meeting Follow-Up Email</a> | Einstein Meeting Follow-Up Email saves reps time by producing AI-generated emails based on customer calls. Meeting Follow-Up Email incorporates crucial meeting details into personalized                                                                                                               | Meeting Follow-Up Email            | Einstein Generative AI<br>Agentforce (Default)<br>Einstein Conversation Insights (ECI) | Enable ECI in Setup from the General Settings page. With ECI enabled, the agent generates a personalized email based on the last voice or video call. If the ECI feature isn't enabled, the agent creates a sales |

| topic | action               | Functionality                                                                                                                                                                                                                                                                                                                                                                                                      | Additional user permissions needed | Prerequisite features                | notes                                                                             |
|-------|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|--------------------------------------|-----------------------------------------------------------------------------------|
|       |                      | emails and other communications that help reps reengage customers quickly after a call. This feature is available through the Draft or Revise Sales Email agent. When a user asks the agent to draft a meeting follow-up email and the user has access to Meeting Follow-Up Emails with Agentforce (Default), the agent uses the internal-only Meeting Follow-Up Sales Email prompt template to compose the email. |                                    |                                      | email, using a template, without having any information related to the last call. |
|       | Send Meeting Request | Send Meeting Request generates a draft of a sales meeting                                                                                                                                                                                                                                                                                                                                                          | Send Meeting Request               | Einstein Generative AI<br>Agentforce | <b>Enable Make Inbox Available to Users in Setup from the</b>                     |

| topic                  | action                                | Functionality                                                                                                                                                                                                                                      | Additional user permissions needed | Prerequisite features                                                    | notes                                                                                                                          |
|------------------------|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|--------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
|                        |                                       | request. The draft can include three time slots for a meeting and a link to the sender's calendar.                                                                                                                                                 |                                    | (Default)<br>Inbox Availability                                          | Salesforce Inbox page.                                                                                                         |
| Forecast Sales Revenue | <a href="#">Get Forecast Guidance</a> | Forecast Guidance gives sales managers clear insight into how their sales reps are performing. When users ask how a specific sales rep is doing, the agent calculates how that rep is tracking to meet their quota and identifies any risky deals. | Forecast Guidance User             | Einstein Generative AI<br>Agentforce (Default)<br>Salesforce Forecasting | <a href="#">Set Up Salesforce Forecasting</a>                                                                                  |
| Manage Deals           | <a href="#">Add Record to Cadence</a> | Add Record to Cadence adds prospects to cadences.                                                                                                                                                                                                  | NA                                 | Einstein Generative AI<br>Agentforce (Default)<br>Sales Engagement       | Enable and configure the Sales Engagement feature in Setup from the <b>Automate</b> tab of the Sales Engagement Settings page. |

| topic | action                     | Functionality                                                                                                                                                                                                                                     | Additional user permissions needed | Prerequisite features                          | notes                                                    |
|-------|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|------------------------------------------------|----------------------------------------------------------|
|       | Create a Label             | Create a Label creates custom labels that can be used to organize and retrieve records easily.                                                                                                                                                    | NA                                 | Einstein Generative AI<br>Agentforce (Default) |                                                          |
|       | Create a To-Do             | Create a To-Do creates tasks for pending actions and follow-ups.                                                                                                                                                                                  | NA                                 | Einstein Generative AI<br>Agentforce (Default) |                                                          |
|       | Find Contact Interactions  | Find Contact Interactions identifies deals or account that a specific contact has influenced.                                                                                                                                                     | Review Buying Committee            | Einstein Generative AI<br>Agentforce (Default) |                                                          |
|       | Find Similar Opportunities | Find Similar Opportunities searches for and returns a list of opportunities that are similar to, but not duplicates of, a specified Salesforce opportunity. The agent returns An explanation of the similarities is with each opportunity record. | NA                                 | Einstein Generative AI<br>Agentforce (Default) | Requires users to have Read permission on Opportunities. |

| topic | action                                | Functionality                                                                                                                                                                                | Additional user permissions needed | Prerequisite features                          | notes |
|-------|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|------------------------------------------------|-------|
|       | <a href="#">Identify Contact Role</a> | Identify Contact Role assesses how a contact affects the outcome of a deal, initiative, or account.                                                                                          | Review Buying Committee            | Einstein Generative AI<br>Agentforce (Default) |       |
|       | <a href="#">Identify Key Contacts</a> | Identify Key Contacts identifies key contacts associated with an account or opportunity.                                                                                                     | Review Buying Committee            | Einstein Generative AI<br>Agentforce (Default) |       |
|       | <a href="#">Label a Record</a>        | Label a Record applies custom labels to a record. By labeling records, sales reps can effortlessly organize them into groups, making it easier to manage, find, and access them efficiently. | NA                                 | Einstein Generative AI<br>Agentforce (Default) |       |
|       | <a href="#">Log a Call</a>            | Log a Call creates a task to log a call with the customer. Add details such as the date, time,                                                                                               | NA                                 | Einstein Generative AI<br>Agentforce (Default) |       |

| topic | action                   | Functionality                                                                                                                                                                                                                                           | Additional user permissions needed | Prerequisite features                                                           | notes                                                                                                                                                                                              |
|-------|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|---------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|       |                          | and purpose so you can easily find the call later on.                                                                                                                                                                                                   |                                    |                                                                                 |                                                                                                                                                                                                    |
|       | Prioritize Opportunities | Prioritize Opportunities identifies a rep's top sales opportunities and ranks them in order of priority based on specific instructions provided by the user or available opportunity data. An explanation for each opportunity's rank is also returned. | NA                                 | Einstein Generative AI<br>Agentforce (Default)                                  | Requires users to have Read permission on Opportunities.                                                                                                                                           |
|       | Review My Day            | Review My Day helps sales reps stay on top of their day, with a view of their pending tasks, meetings, leads, opportunities, and track sales quota.                                                                                                     | NA                                 | Einstein Generative AI<br>Agentforce (Default)<br><br>Einstein Activity Capture | Enable Einstein Activity Capture in Setup from the Settings page.<br>This feature is optional. If this feature is turned on, the events listed include the events that are recorded in third-party |

| topic    | action                                  | Functionality                                                                                                                         | Additional user permissions needed | Prerequisite features                                                                   | notes                                |
|----------|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|-----------------------------------------------------------------------------------------|--------------------------------------|
|          |                                         |                                                                                                                                       |                                    |                                                                                         | integrations like Outlook and Gmail. |
| Prospect | <a href="#">Find Past Collaborators</a> | Find Past Collaborators leverages EAC insights to identify individuals who have worked with important stakeholders in previous deals. | NA                                 | Einstein Generative AI<br>Agentforce (Default)<br><br>Premium Einstein Activity Capture |                                      |

 **Note** Sales Summaries and Sales Email are included in the Single Record Summary and General CRM topics, respectively. Summaries of accounts, contacts, leads, and opportunities are available with Agentforce (Default) through the Summarize Record action, with the Sales Summaries User permission set.

#### See Also

- [Set Up Agents](#)
- [Standard Prompt Templates](#)
- [Enable Einstein Generative AI](#)
- [Manage Permission Set Assignments](#)