



Quickstart Your Einstein Generative AI Solution



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Quickstart Your Einstein Generative AI Solution

Supercharge your workforce efficiency using Agentforce, generative AI, and Einstein.



Your Journey with Einstein Generative AI

A circular icon containing a rocket ship, representing the start of the journey.	A circular icon containing binoculars, representing transformation or vision.	A circular icon containing a clipboard with a checklist, representing project planning.
Get Started with AI What is Generative AI? Generative AI Basics Learn How AI Can Transform Your Business About Einstein Generative AI	Transform Your Business with AI AI Strategy AI Use Case Library Identify AI Use Cases in Your Business Processes How to Build an AI Enterprise in 5 Steps Building Your AI Roadmap (signup required)	Plan Your AI Project AI + Data: Project Planning AI Project Success Four Steps to Drive a Successful AI Pilot
A circular icon containing a padlock, representing data security.	A circular icon containing a wrench, representing customization.	A circular icon containing a stylized L-shaped symbol, representing testing and optimization.
Protect Your Data and Prepare Your Org Set Up Einstein Generative AI Einstein Trust Layer: How It Works and Why It Matters Einstein Trust Layer	Build and Customize AI Solutions Prompt Builder Design and Implement Agents Agentforce Data Library	Test, Release, and Optimize Change Management for AI Implementation Audit Trail Review Toxicity Scores

 Einstein Trust Layer	 Einstein Data Prism	 Einstein Audit and Feedback Data
 Retrieval Augmented Generation (RAG) in Data 360	 Agentforce Developer Guide	 Ensure That a Prompt Template Is Effective

Get Ready for Generative AI

Watch the video: <https://play.vidyard.com/p1MzVJHexrjRv6FQ1fwPwZ>

In this video, learn how Salesforce uses the power of generative AI to transform the way businesses and customers interact. Discover the five key steps to ready your organization for the AI transformation. And see real-world examples and insights that will help you reimagine how you engage with your customers.



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About Einstein Generative AI

Learn more about Einstein generative AI and trust, terminology, and considerations for use.

[Einstein Generative AI & Trust](#)

It's important that your data stays safe while you innovate with new technology. Einstein generative AI keeps trust as its #1 value, and we strive to make sure your data is secure while also creating experiences that are accurate and safe.

[Agentforce and Generative AI Usage and Billing](#)

Usage of certain generative AI features, such as Agentforce features or direct calls to the Large Language Model (LLM) gateway can impact your credit consumption.

[Large Language Model Support](#)

Understand supported large language models (LLMs) from multiple providers for embedded features, such as Prompt Builder. Identify the Salesforce-managed models that are available out of the box.

Learn how you can bring your own model (BYOLLM) by using Einstein Studio.

[Einstein Generative AI Supported Languages and Locales](#)

The Einstein Generative AI Platform supports multiple languages in all regions.

[Manage Salesforce Access to Customer Data](#)

Choose whether to allow Salesforce to access Customer Data in your org. If shared, Salesforce has your consent to use Customer Data for specific purposes.

See Also

[Set Up Einstein Generative AI](#)

Einstein Generative AI & Trust

It's important that your data stays safe while you innovate with new technology. Einstein generative AI keeps trust as its #1 value, and we strive to make sure your data is secure while also creating experiences that are accurate and safe.

Einstein Generative AI and Your Data

At Salesforce, trust is our #1 value. To keep your data secure, Salesforce has agreements in place with large language model (LLM) providers, such as OpenAI. These agreements allow organizations to use generative AI capabilities without their private data being retained by the LLM providers.

Trusted Generative AI

Salesforce's Einstein generative AI solutions are designed, developed, and delivered based on our five principles for trusted generative AI.

- Accuracy: We back up model responses with explanations and sources whenever possible. We recommend that a human checks model responses before sharing with end users for the majority of use cases.
- Safety: We work to detect and mitigate bias, toxicity, and harmful responses from models used in our products through industry-leading detection and mitigation techniques.
- Transparency: We ensure that our models and features respect data provenance and are grounded in your data whenever possible.
- Empowerment: We believe our products should augment people's capabilities and make them more efficient and purposeful in their work.
- Sustainability: We strive towards building right-sized models that prioritize accuracy and reducing our carbon footprint.

Reviewing Generative AI Responses

Generative AI is a tool that helps you be more creative, productive, and make smarter business decisions. This technology isn't a replacement for human judgment. You're ultimately responsible for any LLM-generated response you share with your customers. Whether text is human- or LLM-generated, your customers associate it with your organization's brand and use it to make decisions. So it's important to make sure that LLM-generated responses intended for external audiences are accurate and helpful, and that they align with your company's values, voice, and tone.

When your end users review generated responses for external audiences, focus on the accuracy and safety of the content.

- Accuracy: Generative AI can sometimes "hallucinate"—fabricate responses that aren't grounded in fact or existing sources. Before you publish a response, check to make sure that key details are correct. For example, is the customer service suggestion based on an existing and up-to-date knowledge article?
- Bias and Toxicity: Because AI is created by humans and trained on data created by humans, it can also contain bias against historically marginalized groups. Rarely, some responses can contain harmful language. Check your responses to make sure they're appropriate for your customers.

If the response doesn't meet your standards or your company's business needs, you don't have to use it. Some solutions allow end users to edit the response directly, and if not, it's best to start over and generate another response.

See Also

[Salesforce Research: Trusted AI](#)

Agentforce and Generative AI Usage and Billing

Usage of certain generative AI features, such as Agentforce features or direct calls to the Large Language Model (LLM) gateway can impact your credit consumption.

Usage can be unmetered or metered. See [Metering for Agentforce and Generative AI Usage](#).

When metered, using Agentforce features can impact credit consumption against these credit types.

- [Flex Credits](#)
- [Conversations](#)
- [Einstein Requests](#)

 **Note** To monitor your metered usage access your org's [Digital Wallet](#).

Using Gen AI Credit Types

Einstein Requests can be used with Flex Credits or Conversations.

Other features that use Agentforce or embedded AI can also use these usage types.

[Metering for Agentforce and Generative AI Usage](#)

You can calculate whether generative AI usage is metered or unmetered using the type of agent, the context (human user or system user), and the assigned permissions.

[Configure Unmetered User Based AI Permissions](#)

To enable unmetered AI usage, first assign the Unmetered User Based AI permission set license to the user, create a new permission set for the Unmetered User Based AI system permissions, and then finally assign the Unmetered User Based AI permission to the user.

[Flex Credits Billable Usage Types](#)

Using Agentforce and embedded AI features can impact credit consumption.

[Agentforce Conversations Billable Usage Types](#)

Usage of certain Agentforce features impact credit consumption against subtypes of the Agentforce usage type on the Conversations consumption card. It consists of three subtypes: ASA Messaging, Sales Coach, and SDR.

[Einstein Requests Billable Usage Types](#)

Usage of certain generative AI features impacts credit consumption against subtypes of the Einstein Requests billable usage type. Usage is calculated based on the number of calls to the LLM gateway. Einstein Request usage types apply to embedded generative AI features such as Service Replies that involve direct requests to the LLM for specific tasks.

See Also

[Salesforce Help: About Digital Wallet](#)

Metering for Agentforce and Generative AI Usage

You can calculate whether generative AI usage is metered or unmetered using the type of agent, the context (human user or system user), and the assigned permissions.

Unmetered Usage

Unmetered usage does not consume credits. Generally, when a logged-in user with the Unmetered User Based AI permissions directly interacts with an AI feature or agent, generative AI usage is unmetered. For

more details on how to assign the Unmetered User Based AI permissions to the logged-in user, see [Configure Unmetered User Based AI Permissions](#)

Note

- Unmetered usage doesn't apply to Agentforce Service agents.
- Unmetered usage is available with the Unmetered User-Based AI permissions, which is included in the Agentforce 1 Edition and Agentforce add-ons. See [pricing page](#) for more information.
- Only the usage of certain Agentforce and embedded AI features is unmetered, meaning that credits aren't consumed from Flex Credits, Agentforce Conversations, or Einstein Requests. Other types of credits continue to be consumed when the AI usage uses underlying services, such as when an agent action causes usage of Data Cloud data services.

Metered Usage

Using Agentforce Service agents (aka customer-facing agents) and embedded AI features in the system context is metered and consumes credits.

System context refers to automated AI interactions and are initiated programmatically or automatically, without direct real-time interaction from a logged-in human user. System interactions are often triggered by system events or schedules, handling tasks like data enrichment, processing, and large-scale automation.

Metering Conditions and Types

This table lists the conditions and the type of metering for Agentforce features.

agent type	user is assigned unmetered user-based AI Permissions	human User context	org has Flex Credit Metering	metering type
Default Agent	Not applicable	Not applicable	Not applicable	Einstein Requests
Employee Agent	Yes	Yes	n/a	Unmetered
	Yes	No	Yes	Flex Credits
	No	Yes	Yes	Flex Credits
	No	Yes	No	Einstein Requests
Sales Coach	Yes	Yes	n/a	Unmetered
	Yes	No	Yes	Flex Credits
	No	Yes	Yes	Flex Credits

agent type	user is assigned unmetered user-based AI Permissions	human User context	org has Flex Credit Metering	metering type
	No	Yes	No	Einstein Requests
Agentforce Service Agent	Not applicable	Not applicable	Yes	Flex Credits
	Not applicable	Not applicable	No	Conversations, Einstein Requests

This table lists the conditions and the type of metering for Embedded AI features.

org has an Agentforce Add-on License	User is Assigned Unmetered User-based Ai Permissions	Human user context	Metering type
Yes	Yes	Yes	Unmetered
Yes	Yes	No	Flex Credits
Yes	No	Yes	Flex Credits
No	Not applicable	Not applicable	Einstein Requests

Examples of Unmetered AI Use

This list includes some examples of unmetered generative AI usage. The primary concept here is that a human user initiates the interaction with the AI feature or an agent. See [Configure Unmetered User Based AI Permissions](#).

- You or your employees initiate the interaction using [Agentforce Employee agents](#).
- You edit or save a prompt, or use an out-of-the-box prompt template, such as Field Generation, Sales Email, or Flex templates in your workflow.
- You launch a flow from the Salesforce user interface. For example, launching a [screen flow](#).
- You click a button to autolaunch a flow or a [quick action](#).
- You click a button in the Salesforce user interface to start the interaction with the AI feature or agent. This includes custom UI elements such as buttons or links that you've created.
- You use Einstein Generative AI to Compose and Send Emails.
- You use Agent APIs to interact with Agentforce agents.

Examples of Metered AI Use

This list includes some examples of metered generative AI usage. The primary concept is that AI is utilized within a system context, generally for automation or batch processes.

- A flow that launches from a record update.
- Scheduled flows and events. This includes when the flows and events are scheduled using the UI or through Apex.
- Scheduled Apex Jobs, Class, or batch processes that run on a schedule.
- Apex triggers that run when records are updated.
- Apex Class automation that isn't human user initiated.
- Batch Apex that runs over many records in the background.
- An Agentforce agent runs at a scheduled time to summarize cases.
- A custom button triggers an autolaunched flow running in system context that runs a prompt template.

See Also

[Configure Unmetered User Based AI Permissions](#)

Configure Unmetered User Based AI Permissions

To enable unmetered AI usage, first assign the Unmetered User Based AI permission set license to the user, create a new permission set for the Unmetered User Based AI system permissions, and then finally assign the Unmetered User Based AI permission to the user.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise, Performance, Unlimited, and Developer Editions with the Agentforce 1 Edition, or Agentforce for Sales, Agentforce for Service, Agentforce for Field Service, or Agentforce for an Industry add-on license.

USER PERMISSIONS NEEDED

To edit user permissions: [Manage Profiles and Permissions Sets](#)

To classify an AI interaction as unmetered usage, these key conditions must be met.

- The session must be tied to an identifiable user session or user action such as sending a request or a question to an agent.
- The user account must have the Unmetered User-Based AI permission. This permission authorizes the use of certain AI features without consuming credits.
- The user account must be assigned either a System Administrator or Standard User profile. Custom profiles cloned using a System Administrator or Standard user profiles are also supported. See [Profiles](#).

Assign Unmetered User Based AI Permission Set License to a User

Assign the Unmetered User Based AI permission set licence to the user.

1. From Setup, in the Quick Find box, enter *users*, and then select **Users**.

2. Select a user.
3. On the Permission Set License Assignments section, click **Edit Assignments**.

4. Select Unmetered User Based AI from the list and click **Save**.
5. Click **Save**.

Create a New Unmetered User Based AI Permission Set

Create a new permission set.

1. From Setup, in the Quick Find box, enter permission sets, and then select **Permission Sets**.
2. Click **New**.
3. Enter a name for the label and click **Save**.
4. From the new permission set you created, on the System tab, click **System Permissions..**
5. Click **Edit** to edit the System Permissions. Select Unmetered User Based AI from the list and save.

Assign Unmetered User Based AI permission To a User

Assign the Unmetered User Based AI permission to the user.

1. From Setup, in the Quick Find box, enter *users*, and then select **Users**.
2. Select the user.
3. On the Permission Set Assignments section, click **Edit Assignments**.

4. Add the new Unmetered User Based AI permission set you created.
5. Click **Save**.

Limit	Details
Maximum number of calls to Large Language Models (LLM) Unmetered User-Based AI users can make	30 calls per minute per user for unmetered user-based AI usage.

Flex Credits Billable Usage Types

Using Agentforce and embedded AI features can impact credit consumption.

To use Flex Credits, Salesforce Foundations is required. You can get Salesforce Foundations in one of these ways.

- If you have access to Agentforce through an add-on license, activate Salesforce Foundations in your account. For step-by-step instructions, see [Activate Foundations in your account](#). Requires Enterprise, Performance, Unlimited, or Developer Editions.
- If you access Agentforce through an Agentforce 1 Edition, Salesforce Foundations is included and active on your account.

 **Note** To estimate the number of credits your org will use and calculate ROI based on that estimate, access the [Agentforce ROI Estimator](#)

 **Note** To monitor your usage in these usage types, access your org's [Digital Wallet](#).

Actions Usage Types

Actions are the functions the AI agent uses to get information or perform tasks. There are two types of actions: standard and custom.

- Standard agent actions are actions that are available out of the box. See [Standard Action Reference](#).
- Custom actions are actions that are created by you from scratch or by modifying a standard action. To learn more about what customer created actions are, see [Create a Custom Action](#).

 **Important** The billable usage types for standard and custom actions differ depending on whether they are executed within a text or voice conversation.

Agent actions are billed when they're run, whether they're run deterministically (for example, in reasoning instructions) or during agent reasoning with an LLM. Utilities (escalations to a representative, setting variables, or transitions to another topic) aren't billed as agent actions.

Billing Category	Description
Standard Action	<p>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 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</p>

Billing Category	Description
	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.
Custom Action	<p>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 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. 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>
Standard Voice Action	<p>Usage is determined by the number of standard actions executed by the agent in a voice conversation.</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>
Custom Voice Action	<p>Usage is determined by the number of custom actions executed by the agent in a voice conversation.</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</p>

Billing Category	Description
	actions, see Editing Standard Agent Action Reference Actions .

Agentforce Voice Minutes Usage Type

The Agentforce Voice Minutes usage type is designed for Agentforce Voice Customers as an alternative to Voice Actions usage types. This Usage Type only applies to a limited subset of eligible customers who have purchased a subscription to Agentforce Voice Minutes. Contact your Account Executive for more details on Agentforce Voice Minutes.

Billing Category	Description
Agentforce Voice Minutes	<p>Usage is determined by the duration of the voice call between an end user and Agentforce Voice. Usage is rounded up to the next full minute, meaning any fraction of a minute is treated as a full minute.</p> <p>For example,</p> <ul style="list-style-type: none"> • A call of 60 seconds is billed as 1 minute. • A call of 61 seconds is billed as 2 minutes. <p>If your org has both Agentforce Voice Actions and Agentforce Voice Minutes enabled, Voice Minutes take precedence for billing. When Agentforce Voice Minutes are available in your org, only Agentforce Voice Minutes are metered, and Voice Actions usage types are not applied to the same activity.</p>

Prompt Usage Types

Prompt usage types are calculated based on the number of calls to the large language model (LLM) gateway and vary depending on the large language model used. Prompt usage types apply to embedded generative AI features such as Service Replies that involve direct requests to the LLM for specific tasks.

Billing Category	Description
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,</p>

Billing Category	Description
	<p>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>
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>

Speech Foundation Usage Types

Speech Foundations are AI platform Speech-to-text, Text-to-speech and Translation services. These services empower admins and developers to integrate speech capabilities into workflows such as transcribing voicemails or generating audible alerts. Speech Foundation usage types are metered independently of any other usage types to ensure there are no overlaps in billing. Refer to your feature documentation to determine the applicable usage types for your feature.

Billing Category	Description
Speech-to-Text	<p>Speech-to-Text converts spoken audio into written text, a process run by automatic speech recognition (ASR) models. Usage is calculated based on the duration of the audio processed for each transcription, in seconds. In Digital Wallet, this usage is aggregated and displayed in minutes.</p>
Text-to-Speech	<p>Text-to-Speech converts written text into natural-sounding spoken audio, a process run by automatic Speech Synthesis models. Usage is metered by the number of text characters processed for the</p>

Billing Category	Description
	<p>speech generation. In the Digital Wallet, this usage is aggregated and displayed in units of million characters.</p> <p>To understand how your consumption appears in the Digital Wallet, consider a scenario where you process 9,000 characters for conversion from text to speech. Because this usage is in units of one million characters, your actual consumption is 0.009 units (9,000 divided by 1,000,000). In the Digital wallet, this usage is rounded to two decimal places and the value is displayed as 0.01 units.</p>
Translation	<p>Translation converts text from one human language into text of another, a process executed by machine translation models. Translation usage is metered by the number of characters processed for the translation.</p> <p>To understand how your consumption appears in the Digital Wallet, consider a scenario where you process 9,000 characters for translation. Because this usage is in units of one million characters, your actual consumption is 0.009 units (9,000 divided by 1,000,000). In the Digital wallet, this usage is rounded to two decimal places and the value is displayed as 0.01 units.</p>

See Also

[Agentforce and Generative AI Usage and Billing](#)

[Einstein Requests Billable Usage Types](#)

Agentforce Conversations Billable Usage Types

Usage of certain Agentforce features impact credit consumption against subtypes of the Agentforce usage type on the Conversations consumption card. It consists of three subtypes: ASA Messaging, Sales Coach, and SDR.

-  **Note** From January 13, 2025 until sometime after March 18, 2025, Conversations won't be consumed when using Agentforce in Slack. However, Einstein Requests and Data 360 credits will be consumed.
-  **Note** To monitor your usage in these usage types, access your org's [Digital Wallet](#).

Usage Types

Billing Category	Description
Agentforce: ASA Messaging	<p>For this subtype of the Agentforce usage type, usage is calculated based on conversation windows. A conversation window starts when:</p> <ul style="list-style-type: none"> when the user sends a message for the first time after the previous conversation window ends, or when ASA sends a pre-configured welcome message first. <p>The end of the conversation window differs for each Digital Engagement channel on which ASA is enabled.</p> <p>For the Messaging for Web channels:</p> <ul style="list-style-type: none"> For unauthenticated users, the conversation window ends when the user ends the conversation. For authenticated users, the conversation window ends 24 hours after the start of the conversation. <p>For these channels, the conversation window ends 24 hours after the start of the conversation.</p> <ul style="list-style-type: none"> Messaging for In-App Enhanced WhatsApp Enhanced Facebook Messenger Enhanced Apple Messages for Business Enhanced SMS Enhanced LINE
Agentforce: Sales Coach	<p>For this subtype of the Agentforce usage type, usage is calculated based on conversations. One conversation is consumed whenever a user clicks “Get Feedback” after a role play or a stand-and-deliver coaching session. To learn more, see Sales Coach Agent.</p>
Agentforce: SDR	<p>For this subtype of the Agentforce usage type, usage is calculated based on conversations. A Conversation is consumed when an SDR agent sends out the initial email to a lead. All subsequent activities carried out by the SDR agent for that lead are included in the initial Conversation. A user can cancel an Agentforce SDR outreach by choosing Cancel SDR Agent Outreach from an email task in the Activity Timeline. If a user later restarts SDR for the same lead,</p>

Billing Category	Description
	<p>another Conversation is consumed. To learn more, see Agentforce SDR.</p> <p>Each conversation consumes Einstein Requests when it accesses the LLM.</p>

See Also

[Agentforce and Generative AI Usage and Billing](#)
[Einstein Requests Billable Usage Types](#)

Einstein Requests Billable Usage Types

Usage of certain generative AI features impacts credit consumption against subtypes of the Einstein Requests billable usage type. Usage is calculated based on the number of calls to the LLM gateway. Einstein Request usage types apply to embedded generative AI features such as Service Replies that involve direct requests to the LLM for specific tasks.

 **Note** To monitor your usage in these usage types, access your org's [Digital Wallet](#).

Einstein Requests Usage Types

Einstein Requests can be consumed with Agentforce Conversations or Flex Credits when the usage involves direct calls to the LLM gateway.

Billing Category	Description
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 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>
Standard Prompts	Usage is calculated based on two factors: the number of direct requests to the LLM via the LLM gateway, and whether the gateway

Billing Category	Description
Basic Prompts	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.
Advanced Prompts	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. Tokens are units of data processed by the AI models.

See Also

[Agentforce and Generative AI Usage and Billing](#)

Large Language Model Support

Understand supported large language models (LLMs) from multiple providers for embedded features, such as Prompt Builder. Identify the Salesforce-managed models that are available out of the box. Learn how you can bring your own model (BYOLLM) by using Einstein Studio.

 **Note** Changing the model can affect your usage, see [Einstein Usage](#).

Agentforce Models

This page focuses on supported LLMs for embedded features, such as Prompt Builder. For model options in Agentforce, see [Select Agentforce Model Option](#).

Salesforce-Managed Models

Quickly get started with generative AI features by choosing a Salesforce-managed model. Features like Prompt Builder and the Models API allow you to customize AI implementations with different models and use them in your apps. Salesforce-managed models are enabled by default to speed up the configuration process.

This table lists the Salesforce-managed models that are available for embedded features, such as Prompt Builder. For Agentforce, see the Agentforce Models section.

Model Provider	Model Family	Version	Usage Type	Model Regions	Notes
Bedrock (Amazon)	Nova Lite	nova-lite-2024-12-04	Basic Prompts	Australia, France, Germany, India, Italy, Japan, Switzerland, United Kingdom, United States	
Bedrock (Amazon)	Nova Pro	nova-pro-2024-12-04	Standard Prompts	Australia, France, Germany, India, Italy, Japan, Switzerland, United Kingdom, United States	
Bedrock (Anthropic)	Claude 3 Haiku	claude-3-haiku-20240307	Basic Prompts	Australia, Brazil, Canada, Germany, India, Indonesia, Japan, Switzerland, United Kingdom, United States	Deprecated
Bedrock (Anthropic)	Claude Haiku 4.5	claude-haiku-4-5-20251001	Standard Prompts	Australia, France, Germany, Italy, Japan, Sweden, United States	Reasoning is not currently supported.
Bedrock (Anthropic)	Claude Opus 4.5 (Beta)	claude-opus-4-5-20251101	Advanced Prompts	United States	Reasoning is not currently supported.
Bedrock (Anthropic)	Claude 3.7 Sonnet	claude-3-7-sonnet-20250219	Standard Prompts	Australia, France, Germany, India, Japan, Singapore, South Korea, Sweden, United Kingdom, United States	Deprecated. Reasoning is not currently supported.
Bedrock (Anthropic)	Claude Sonnet 4	claude-sonnet-4-20250514	Standard Prompts	Australia, France, Germany, India, Indonesia, Japan, Singapore, South Korea, Sweden, United States	

Model Provider	Model Family	Version	Usage Type	Model Regions	Notes
Bedrock (Anthropic)	Claude Sonnet 4.5	claude-sonnet-4-5-20250929	Standard Prompts	Australia, France, Germany, Italy, Japan, Sweden, United States	Reasoning is not currently supported.
Bedrock (NVIDIA)	Nemotron 3 Nano 30B (Beta)	nvidia.nemotron-nano-3-30b	Basic Prompts	Brazil, India, Italy, Japan, United Kingdom, United States	
OpenAI and Azure OpenAI	GPT-4o (GPT 4 Omni)	gpt-4o-2024-11-20	Standard Prompts	OpenAI: United States Azure OpenAI: Australia, Brazil, Canada, France, Germany, India, Japan, Sweden, Switzerland, United Kingdom, United States	See Geo-Aware Routing for OpenAI and Azure OpenAI .
OpenAI	GPT-4o Mini	gpt-4o-mini-2024-07-18	Basic Prompts	United States	
OpenAI and Azure OpenAI	GPT-4o-mini (GPT 4 Omni Mini)	gpt-4o-mini-2024-07-18	Basic Prompts	OpenAI: United States Azure OpenAI: Australia, Canada, France, Germany, Japan, Sweden, United Kingdom, United States	See Geo-Aware Routing for OpenAI and Azure OpenAI .
OpenAI and Azure OpenAI	GPT-4.1	gpt-4.1-2025-04-14	Standard Prompts	OpenAI: United States Azure OpenAI: France, Germany, Sweden, United States	See Geo-Aware Routing for OpenAI and Azure OpenAI .
OpenAI and Azure OpenAI	GPT-4.1 Mini	gpt-4.1-mini-2025-04-14	Basic Prompts	OpenAI: United States	See Geo-Aware Routing

Model Provider	Model Family	Version	Usage Type	Model Regions	Notes
				Azure OpenAI: United States	for OpenAI and Azure OpenAI.
OpenAI and Azure OpenAI	GPT-5	gpt-5-2025-08-07	Standard Prompts	OpenAI: United States Azure OpenAI: Sweden, United States	See Geo-Aware Routing for OpenAI and Azure OpenAI .
OpenAI and Azure OpenAI	GPT-5 Mini	gpt-5-mini-2025-08-07	Basic Prompts	OpenAI: United States Azure OpenAI: Sweden, United States	See Geo-Aware Routing for OpenAI and Azure OpenAI .
OpenAI and Azure OpenAI	GPT 5.1 (Beta)	gpt-5.1-2025-11-13	Standard Prompts	OpenAI: United States Azure OpenAI: Sweden, United States	Beta model. Reasoning is not currently supported.
OpenAI and Azure OpenAI	GPT 5.2 (Beta)	gpt-5.2-2025-12-11	Standard Prompts	OpenAI: United States Azure OpenAI: United States	Beta model. Reasoning is not currently supported.
OpenAI and Azure OpenAI	O3	o3-2025-04-16	Standard Prompts	OpenAI: United States Azure OpenAI: France, Germany, Sweden, United States	

Model Provider	Model Family	Version	Usage Type	Model Regions	Notes
OpenAI and Azure OpenAI	O4 Mini	o4-mini-2025-04-16	Standard Prompts	OpenAI: United States Azure OpenAI: France, Germany, Sweden, United States	
Vertex AI (Google)	Gemini 2.5 Flash	gemini-2.5-flash-2025-06-17	Basic Prompts	Australia, Canada, India, Japan, Netherlands, Singapore, South Korea, United Kingdom, United States	
Vertex AI (Google)	Gemini 2.5 Flash Lite	gemini-2.5-flash-lite-2025-07-22	Basic Prompts	Netherlands, United States	
Vertex AI (Google)	Gemini 2.5 Pro	gemini-2.5-pro-2025-06-17	Standard Prompts	Netherlands, United States	
Vertex AI (Google)	Gemini 3 Flash (Beta)	gemini-3-flash-preview-2025-12-17	Basic Prompts	United States	
Vertex AI (Google)	Gemini 3 Pro (Beta)	gemini-3-pro-preview-2025-11-18	Standard Prompts	United States	Beta model. Reasoning is not currently supported.

 **Note** All the Salesforce-managed models might not be available in your org.

- In Setup, a Salesforce admin can disable a model provider. See [Manage Model Provider Access](#).
- In Einstein Studio, a Salesforce admin can hide an LLM configuration from being selected in Prompt Builder. See [Manage Large Language Model \(LLM\) Access by Hiding Configurations](#).

For more details about Usage Type, see [Agentforce and Generative AI Usage and Billing](#).

For more details about these supported models, see [Supported Models](#) in the Agentforce Developer Guide.

Model Limits

For information about limits per model, such as requests per minute (RPM) and token limits, see [Large Language Model Limits](#).

Beta Models

Beta models are new models from model providers that Salesforce is beta testing. Beta models typically have lower rate limits and may not be available in all regions. A beta model has (Beta) appended to its name. If beta models aren't turned on, they appear as (Disabled) in Einstein Studio.

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

Before you can turn on beta generative AI models, you must turn on Data 360. Data 360 is automatically provisioned as soon as a Data Cloud license is added to your Salesforce org. See [Turn On Data 360](#).

To turn on beta generative AI models, go to Einstein Setup. After beta models are enabled, you can see them in Einstein Studio and use them just like any Salesforce-managed model.

We recommend that you enable beta models in sandbox or development orgs only.

Bring Your Own Large Language Model (BYOLLM)

The Einstein platform allows you to customize your AI experience by bringing in your own models to Salesforce. You can bring in your own model by using Einstein Studio and write a prompt template in Prompt Builder, which you can then integrate into your own apps or an agent. Some common reasons companies want to use different models with Einstein include:

- Your company has an LLM fine-tuned to your data.
- You can use your Azure, Bedrock, OpenAI, or Vertex account.

BYOLLM supports many of the Salesforce-managed models and these additional models:

Model Provider	Model Family	Notes
Bedrock (Anthropic)	Claude 3 Opus	Retired by Bedrock.
Bedrock (Anthropic)	Claude 3 Sonnet	Retired by Bedrock
Bedrock (Anthropic)	Claude 3.5 Sonnet	Deprecated by Bedrock. Retirement on March 1, 2026.
Vertex AI (Google)	Gemini 1.5 Pro	Retired by Vertex AI

To use models and providers not listed on this page, see the [LLM Open Connector](#).

-  **Note** For BYOLLM and LLM Open Connector, Salesforce uses a set of IP addresses to communicate with an LLM that you host yourself. If your security policy requires a strict network Access Control List (ACL), make sure to add to your allowlists the IP addresses in the BYO Models and Open Connector IP Addresses section of [Salesforce Core Services - IP Addresses and Domains to Allow](#).

Develop LLM Solutions with the Models API

Developers can use Models API to code custom solutions. See the [Models API Developer Guide](#).

Sustainability

Sustainability is a core value at Salesforce. Selecting the appropriate model is one of the most effective ways to reduce energy consumption, water usage, and carbon emissions. Compare the environmental impact of these models by using the relative Sustainability Score in the bottom-right section of the [Agentic Benchmark](#) page on the AI Research site. For more details on Salesforce's approach to AI sustainability, see [Sustainability at Salesforce](#).

Deprecated Models

Model deprecation is the process by which a model provider gradually phases out a model, usually in favor of a new and improved model. A deprecated model may reroute to a preferred model to ensure continuity of service. To learn more, see [Prepare for Model Deprecation and Rerouting](#).

We recommend that you start migrating your applications as soon as the deprecation is announced. During migration, update and test each part of your application with the replacement model that we recommend.

These models are deprecated or rerouted.

Deprecated Model	Recommended Replacement	Deprecated Date	Reroute Date
Bedrock (Anthropic) Claude 3.7 Sonnet	Claude Sonnet 4.5	Jan 6, 2026	Feb 26, 2026
Bedrock (Anthropic) Claude 3 Haiku	Claude Sonnet 4.5	Jan 6, 2026	Feb 26, 2026
Vertex AI (Google) Gemini 2.0 Flash	Gemini 2.5 Flash	Jan 20, 2026	Feb 20, 2026
Vertex AI (Google) Gemini 2.0 Flash	Gemini 2.5 Flash Lite	Jan 20, 2026	Feb 20, 2026
Azure OpenAI GPT 3.5 Turbo	GPT 4 Omni	Jun 16, 2025	Jul 16, 2025

OpenAI GPT 3.5 Turbo	GPT 4 Omni Mini	Jun 16, 2025	Jul 16, 2025
OpenAI GPT 4	GPT 4 Omni	Jun 2, 2025	Jun 30, 2025
OpenAI GPT 4 Turbo	GPT 4 Omni	May 6, 2025	Jun 30, 2025
OpenAI GPT 4 32k	GPT 4 Omni	Jun 6, 2024	Jun 6, 2025
Azure OpenAI GPT 4 Turbo	GPT 4 Omni	April 7, 2025	May 1, 2025
Azure OpenAI GPT 3.5 Turbo 16k	Azure OpenAI GPT 3.5 Turbo	Nov 6, 2023	Nov 13, 2024
OpenAI GPT 3.5 Turbo 16k	GPT 3.5 Turbo	Nov 6, 2023	Sep 13, 2024

Rerouted Models

These models are rerouted.

Model Provider	Model Family	Version	Rerouted To
Azure OpenAI	GPT-3.5 Turbo	gpt-3.5-turbo-0613	GPT 4 Omni Mini
Azure OpenAI	GPT-3.5 Turbo 16K	gpt-3.5-turbo-16k-0613	GPT 4 Omni Mini
Azure OpenAI	GPT-4 Turbo	gpt-4-1106-Preview	GPT 4 Omni
OpenAI	GPT-3.5 Turbo	gpt-3.5-turbo-0125	OpenAI GPT 4 Omni Mini
OpenAI	GPT-3.5 Turbo 16K	gpt-3.5-turbo-16k	OpenAI GPT 4 Omni Mini
OpenAI	GPT-4	gpt-4-0613	GPT 4 Omni
OpenAI	GPT-4 32K	gpt-4-32k-0613	GPT 4 Omni
OpenAI	GPT-4 Turbo	gpt-4-0125-preview	GPT 4 Omni
Vertex AI (Google)	Gemini 2.0 Flash	gemini-2.0-flash-001	Gemini 2.5 Flash
Vertex AI (Google)	Gemini 2.0 Flash Lite	gemini-2.0-flash-lite-001	Gemini 2.5 Flash Lite

Announcing New and Deprecated Models

New model announcements and model deprecation announcements are part of the monthly [Einstein Platform release notes](#).

Manage Model Provider Access

Choose which Large Language Model (LLM) providers to allow or not allow in your organization. When access to a model provider is turned on, you can use its language learning models (LLMs) in agents, prompt templates, APIs, and other features in generative AI solutions. Turn off a model provider to block access to its models in your org.

Prepare for Model Deprecation and Rerouting

This document provides guidance on retesting Salesforce AI implementations during model deprecation and rerouting. Deprecation and rerouting are considered temporary. If your model is in one of these states, consider switching to a new model.

Large Language Model Multimodal Support

Salesforce-managed models have different levels of support and limits for including JPG, PNG, or PDF files in a model request.

Large Language Model Limits

Understand limits for supported large language models (LLMs) from multiple providers for embedded features, such as Prompt Builder. Limits for each model include requests per minute and token limits.

Salesforce-Owned Models

Salesforce AI Research creates, trains, and fine tunes models to address specific Salesforce use cases. These models are hosted on AWS within the Salesforce Trust Boundary.

Batch Models

Use Prompt Template Batch Processing to generate large quantities of responses for prompt templates asynchronously.

See Also

[Bring Your Own Large Language Model](#)

[Select Agentforce Model Option](#)

Manage Model Provider Access

Choose which Large Language Model (LLM) providers to allow or not allow in your organization. When access to a model provider is turned on, you can use its language learning models (LLMs) in agents, prompt templates, APIs, and other features in generative AI solutions. Turn off a model provider to block access to its models in your org.

REQUIRED EDITIONS

Data Cloud in **Developer**, **Enterprise**, **Performance**, and **Unlimited** editions.

Einstein generative AI is available in Lightning Experience. Setup for Einstein generative AI is available in Lightning Experience.

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To change model provider access: Admin permissions

 **Warning** Turning off a model provider can stop Agentforce agents, prompt templates, and other generative AI features that use its models from running. Be sure to test and verify AI-enabled functionality in a sandbox org before you deploy it into production. Affected components can include (but aren't limited to):

- Agentforce Agents
- Agent Actions
- Agentforce Testing Center
- Prompt templates
- APIs
- Email Summaries
- Knowledge Generation
- Service Replies
- Generative Campaigns
- Sales Summaries
- Agentforce API
- Agentforce Vibes Extension
- Salesforce features that access LLMs

To manage model provider access:

1. From Setup, in the Quick Find box, enter *Einstein Setup*.

2. Turn on Einstein if it's not already turned on.

3. Scroll down to **Configure Model Providers**.



4. Selectively turn on or off model providers.

Usually, model providers are enabled by default. For Government Cloud users, model providers are disabled by default. For Amazon Bedrock, currently only Anthropic and Amazon models are affected.

5. If you turn off access for a model provider, you're warned that disabling access stops affected components from running. Confirm your selection.

 **Important** It can take up to ten (10) minutes for model provider disablement to take effect.

Prepare for Model Deprecation and Rerouting

This document provides guidance on retesting Salesforce AI implementations during model deprecation and rerouting. Deprecation and rerouting are considered temporary. If your model is in one of these states, consider switching to a new model.

Term Glossary	
Deprecation	In the context of AI development, “deprecation” describes a model that is no longer recommended for use. Model providers, such as Open AI, typically deprecate old models when new, improved models are available. Deprecation is a formal process that indicates to users to transition to a different model. During the deprecation phase, a deprecated model still works as designed.
Rerouting	Model rerouting is a process of redirecting requests from an older model to an available alternative. Rerouting can occur when the model provider deprecates or retires the model. Salesforce reroutes requests to ensure the continuity of service.

Deprecation and Rerouting Information

Model deprecation and rerouting notices are published in the [Einstein Platform release notes](#). A list of deprecated and rerouted models are also listed on the [Large Language Model Support](#) page.

When a model provider retires a model, Salesforce may route requests to the latest version of that model family to ensure continuity of service. For example, OpenAI GPT 3.5 Turbo 16k requests route to OpenAI GPT 3.5 Turbo.

Define Success for Your Implementation

1. Define what success looks like for your end users. Different use cases require unique testing methods.
2. Save testing results from the initial implementation phase. If you have examples of expected responses, use them to compare with the result. Use the same tests for the new model to ensure there aren't significant variations.

Guidance When Changing Models

1.  **Note** Review the model configuration in Model Builder. See, [Create a Model Configuration](#).

When configuring a model in Einstein Studio Model Playground, deprecated and rerouted models can't be selected. Instead, you can select a new foundation model to continue using your configurations.

2. In Einstein Studio, create a new configured model that matches the rerouted model (if applicable). Set the configuration with the same hyperparameters as the previous model.
3. After saving the configuration, open Prompt Builder.

4. Retest prompt templates using the new model. Testing prompts and responses in Prompt Builder can be done directly in the Model Playground in Einstein Studio. Adjust the prompt template so that it aligns with your goals.
5. If your implementation includes agents, open the agent in Agentforce Builder. In Agentforce Builder, you can test topics, actions, and knowledge to configure an agent. Adjust the agent behavior so that it aligns with the predetermined definition of success.
6. After setting the configured model, prompt template, and agent individually, test your entire AI implementation end to end. It is important to continually get user feedback for improvements.

Large Language Model Multimodal Support

Salesforce-managed models have different levels of support and limits for including JPG, PNG, or PDF files in a model request.

Request Limits

To ensure quality of service, we have some limits for multimodal model requests. These limits apply to all Salesforce-managed models.

- Maximum total file size per request: 15MB
- Maximum number of files per request: 10 (any combination of JPG, PNG, or PDF)
- Maximum number of PDF files per request for Bedrock: 5

 **Important** Some models may have additional limits that are not listed here. For more details, check the documentation for a model provider.

Model Support

This table lists multimodal support for Salesforce-managed models.

Model Provider	Model Family	Image (JPG or PNG)	PDF
Bedrock (Amazon)	Nova Lite	Yes	Yes
Bedrock (Amazon)	Nova Pro	Yes	Yes
Bedrock (Anthropic)	Claude 3 Haiku	Yes	Yes
Bedrock (Anthropic)	Claude Haiku 4.5	Yes	Yes
Bedrock (Anthropic)	Claude Opus 4.5 (Beta)	Yes	Yes
Bedrock (Anthropic)	Claude 3.7 Sonnet	Yes	Yes
Bedrock (Anthropic)	Claude Sonnet 4	Yes	Yes
Bedrock (Anthropic)	Claude Sonnet 4.5	Yes	Yes

Model Provider	Model Family	Image (JPG or PNG)	PDF
Bedrock (NVIDIA)	Nemotron 3 Nano 30B (Beta)	No	No
OpenAI and Azure OpenAI	GPT-4o (GPT 4 Omni)	Yes	No*
OpenAI	GPT-4o Mini	Yes	Yes
OpenAI and Azure OpenAI	GPT-4o-mini (GPT 4 Omni Mini)	Yes	No
OpenAI and Azure OpenAI	GPT 4.1	Yes	No
OpenAI and Azure OpenAI	GPT 4.1 Mini	Yes	No
OpenAI and Azure OpenAI	GPT-5	Yes	No
OpenAI and Azure OpenAI	GPT 5.1 (Beta)	Yes	No
OpenAI and Azure OpenAI	GPT 5.2 (Beta)	Yes	No
OpenAI and Azure OpenAI	GPT-5 Mini	Yes	No
OpenAI and Azure OpenAI	O3	Yes	No
OpenAI and Azure OpenAI	O4	Yes	No
Vertex AI (Google)	Gemini 2.5 Flash	Yes	Yes
Vertex AI (Google)	Gemini 2.5 Flash Lite	Yes	Yes
Vertex AI (Google)	Gemini 2.5 Pro	Yes	Yes
Vertex AI (Google)	Gemini 3 Flash (Beta)	Yes	Yes
Vertex AI (Google)	Gemini 3 Pro (Beta)	Yes	Yes

* A geo-aware model, such as GPT 4 Omni, uses OpenAI or Azure OpenAI to service LLM requests. Because Azure OpenAI doesn't support PDF input, you can't send a PDF in a request to a geo-aware model. For more information, see [Geo-Aware LLM Request Routing on the Einstein Generative AI Platform](#).

Model Provider File Size Limits

Some model providers have extra limits for individual file size. The next table gives more details on these extra file size limits.

Model Provider	File Size Limits
Bedrock (Amazon and Anthropic)	<ul style="list-style-type: none"> • 3.75 MB per JPG or PNG (except for Amazon Nova Pro, which has a 15 MB limit per image) • 4.5 MB per PDF
Vertex AI (Google)	7 MB per JPG or PNG

Einstein Trust Layer Support

If a PDF is uploaded as a binary file in a model request, Einstein Trust Layer protections are not applied. To apply Einstein Trust Layer protections, you must extract the contents of the PDF and send the contents in a prompt in text format. Similarly, Einstein Trust Layer protections are not applied to JPG or PNG images.

See Also

- [Large Language Model Support](#)
- [Large Language Model Limits](#)

Large Language Model Limits

Understand limits for supported large language models (LLMs) from multiple providers for embedded features, such as Prompt Builder. Limits for each model include requests per minute and token limits.

Rate Limits

There's a default rate limit of 1,000 LLM generation requests per minute (RPM) per org for many models in production orgs. However, depending on a model's usage and the available capacity from model providers, the RPM limit can vary by model. For the RPM limit per org for individual models, see the Salesforce-Managed Model Limits section.

For sandboxes, the default rate limit is 500 generation requests per minute per org.

Salesforce-Managed Model Limits

This table lists the limits for Salesforce-managed models that are available for embedded features, such as Prompt Builder.

Model Provider	Model Family	Maximum Requests Per Minute (RPM)	Maximum Input Tokens	Maximum Output Tokens
Bedrock (Amazon)	Nova Lite	500	300,000	5,000
Bedrock (Amazon)	Nova Pro	500	300,000	5,000
Bedrock (Anthropic)	Claude 3 Haiku	200	200,000	4,096
Bedrock (Anthropic)	Claude Haiku 4.5	250	200,000	8,192
Bedrock (Anthropic)	Claude Opus 4.5 (Beta)	300	200,000	8,192
Bedrock (Anthropic)	Claude 3.7 Sonnet	100	200,000	8,192
Bedrock (Anthropic)	Claude Sonnet 4	100	200,000	8,192
Bedrock (Anthropic)	Claude Sonnet 4.5	500	200,000	8,192
Bedrock (NVIDIA)	Nemotron 3 Nano 30B (Beta)	1,000	256,000	8,192
OpenAI and Azure OpenAI	GPT-4o (GPT 4 Omni)	1,000	128,000	16,384
OpenAI	GPT-4o Mini	1,000	128,000	16,384
OpenAI and Azure OpenAI	GPT-4o-mini (GPT 4 Omni Mini)	1,000	128,000	16,384
OpenAI and Azure OpenAI	GPT-4.1	500	128,000	32,768
OpenAI and Azure OpenAI	GPT-4.1 Mini	500	128,000	32,768
OpenAI and Azure OpenAI	GPT-5	500	272,000	128,000
OpenAI and Azure OpenAI	GPT-5 Mini	500	272,000	128,000
OpenAI and Azure OpenAI	GPT 5.1 (Beta)	300	272,000	128,000
OpenAI and Azure OpenAI	GPT 5.2 (Beta)	300	272,000	128,000
OpenAI and Azure OpenAI	O3	500	200,000	100,000
OpenAI and Azure OpenAI	O4 Mini	500	200,000	100,000
Vertex AI (Google)	Gemini 2.5 Flash	250	1,048,576	65,536

Model Provider	Model Family	Maximum Requests Per Minute (RPM)	Maximum Input Tokens	Maximum Output Tokens
Vertex AI (Google)	Gemini 2.5 Flash Lite	250	1,048,576	65,536
Vertex AI (Google)	Gemini 2.5 Pro	250	1,048,576	65,536
Vertex AI (Google)	Gemini 3 Flash (Beta)	100	1,048,576	65,536
Vertex AI (Google)	Gemini 3 Pro (Beta)	50	1,048,576	65,536

Data Masking Token Limit

When data masking is turned on in the Einstein Trust Layer, all models are currently limited to a context size of 65,536 tokens. To turn off data masking and use the full context window, see [Set up Einstein Trust Layer](#).

See Also

- [Large Language Model Support](#)
- [Large Language Model Multimodal Support](#)
- [Agentforce Developer Guide: Rate Limits for Models API](#)

Salesforce-Owned Models

Salesforce AI Research creates, trains, and fine tunes models to address specific Salesforce use cases. These models are hosted on AWS within the Salesforce Trust Boundary.

CodeGen

CodeGen is trained to generate code and is used by features, such as Agentforce Vibes Extension.

[Agentforce Vibes Extension](#) is an AI-powered developer tool that's available as an easy-to-install Visual Studio Code extension.

HyperClassifier

HyperClassifier is used by features, such as topic classification in Agentforce.

HyperClassifier is built on the GPT OSS open-source model series from OpenAI.

TextEval

TextEval is used by features, such as citations and Testing Center.

TextEval is built on the GPT OSS open-source model series from OpenAI.

See Also

[Salesforce AI Research: CodeGen](#)

[Agentforce Developer Guide: Supported Models](#)

[OpenAI: Introducing gpt-oss](#)

Batch Models

Use Prompt Template Batch Processing to generate large quantities of responses for prompt templates asynchronously.

To asynchronously generate large quantities of responses for prompt templates, you can use Prompt Template Batch Processing. For more information on batch processing, see [Flow Core Action: Prompt Template Actions](#) in Salesforce Help and [Prompt Template Batch Processing](#) in the Agentforce Developer Guide.

Native Batch Supported Models

Certain Salesforce-managed models enable batch processing natively supported by the model provider. These models support native batch processing:

- GPT 4.1
- GPT 4.1 Mini
- GPT 4 Omni
- GPT 4 Omni Mini
- GPT 5
- GPT 5 Mini
- OpenAI GPT 4 Omni Mini
- Bedrock Claude Haiku 4.5
- Bedrock Claude Sonnet 4.5

Native Batch Limits

When using models that support native batch processing, there is a limit of 50,000 items per day. Via Apex, there is a limit of 10,000 items per job, and you can start 5 job runs in 24 hours. For more information on processing batch requests via Apex, see [Prompt Template Batch Processing](#).

Batch Model Routing Behavior

! **Important** Batch processing doesn't follow geo-aware routing rules and doesn't provide in-region enforcement.

There are different routing behaviors depending on the model provider used for native provider batch processing.

Azure Batch Model Routing Behavior

Azure native model provider batch processing uses global model endpoints. For these models, batch requests may be processed in regions outside your org's region, even if non-batch LLM requests are restricted to in-region Azure endpoints.

For more information on Azure's global model endpoints, see [Models by deployment type](#).

Bedrock Batch Model Routing Behavior

Native provider batch requests to Anthropic models on Bedrock may route to regions outside of your org's region. Native provider batch requests outside of the United States, Australia, Sweden, Germany, Italy, Ireland, or Japan may be processed in another region.

Einstein Generative AI Supported Languages and Locales

The Einstein Generative AI Platform supports multiple languages in all regions.

Agentforce Supported Languages

Language	Locale	Code
English	English (Australia)	en_AU
	English (United Kingdom)	en_UK
	English (United States)	en_US
Arabic (Beta)	None	ar
Bulgarian	None	bg
Catalan	None	ca
Chinese Simplified	Chinese (China)	zh_CN
Chinese Traditional	Chinese (Taiwan)	zh_TW

Language	Locale	Code
Croatian	None	hr
Czech	None	cs
Dutch	None	nl
Danish	None	da
Estonian	None	et
Finnish	None	fi
French	French (Canada)	fr_CA
	French (France)	fr_FR
German	German (Germany)	de_DE
Greek	None	el
Hebrew (Beta)	None	he
Hindi	None	hi
Hungarian	None	hu
Indonesian	None	id
Italian	Italian (Italy)	it_IT
Japanese	Japanese (Japan)	ja_JA
Korean	None	ko
Malay	None	ms
Norwegian	None	no
Polish	None	pl
Portuguese	Portuguese (Brazil)	pt_BR
	Portuguese (Portugal)	pt_PR
Romanian	None	ro
Spanish	Spanish (Spain)	es_ES
	Spanish (Mexico)	es_MX
Swedish	None	sv
Tagalog	None	tl

Language	Locale	Code
Thai	None	th
Turkish	None	th
Vietnamese	None	vi

For Agentforce-specific features and actions, refer to the relevant Agentforce help topic, such as [Agentforce Considerations](#) and [Agent Types and Considerations](#).

Generative AI Features Supported Languages

All generative AI features support English. Some features or their components can support additional languages.

Platform Supported Languages

Language	Locale	Code
English	English (Australia)	en_AU
	English (Canada)	en_CA
	English (India)	en_IN
	English (Ireland)	en_IE
	English (New Zealand)	en_NZ
	English (Singapore)	en_SG
	English (United Kingdom)	en_UK
	English (United States)	en_US
French	French (Belgium)	fr_BE
	French (Canada)	fr_CA
	French (France)	fr_FR
	French (Switzerland)	fr_CH
German	German (Austria)	de_AT
	German (Germany)	de_DE
	German (Switzerland)	de_CH
Italian	Italian (Italy)	it_IT

Language	Locale	Code
	Italian (Switzerland)	it_CH
Japanese	Japanese (Japan)	ja_JA
Spanish	Spanish (Spain)	es_ES

Manage Salesforce Access to Customer Data

Choose whether to allow Salesforce to access Customer Data in your org. If shared, Salesforce has your consent to use Customer Data for specific purposes.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To view or change sharing consent

Opt Out of Customer Data Access

Why Share Customer Data with Salesforce?

Sharing gives Salesforce consent to use Customer Data, as defined in our Main Services Agreement (MSA), in your org for the following purposes:

- Train global predictive AI models for use by the services and features to which you have access
- Improve the services and features to which you have access
- Conduct research into and development of new services and features



Note This data sharing setting doesn't affect Salesforce's zero-data retention (ZDR) policy with third-party Large Language Models (LLMs).

Opting in allows you to:

- participate in pilot programs
- get early access to Agentforce and Einstein features
- improve the relevance of search results for terms that are specific to your Salesforce org or to your industry, and
- contribute to ongoing Salesforce efforts to improve certain products or services enabled in your Salesforce org.

Government Cloud or Organizational Consent

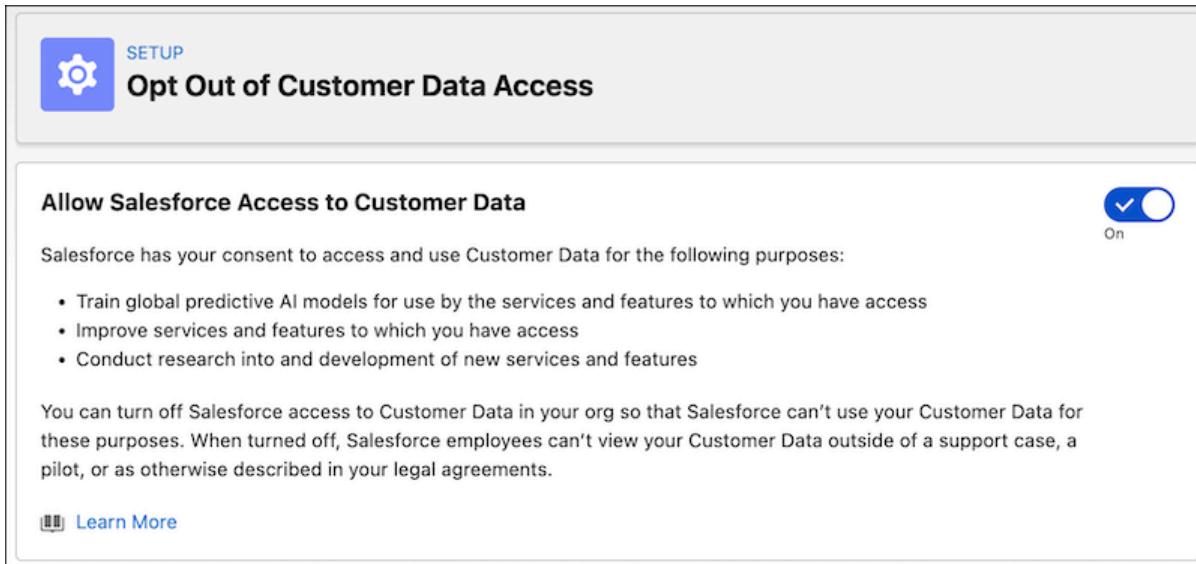
Customer data access is allowed by default unless your organization:

- uses Government Cloud, or
- has decided to opt out, or has previously opted out, of sharing Customer Data with Salesforce.

If you get a read-only page, then your organization either uses Government Cloud or has opted out by some other means. In either case, you can't turn it on.

Manage Consent for Data Sharing

1. From Setup, in the Quick Find box, enter *Einstein Setup*, and then select Einstein Setup. Make sure that Einstein Setup is turned on in your org.
2. From Setup, in the Quick Find box, enter *Opt Out of Customer Data Access*, and then select it.



3. If allowed, turn consent on or off.

What Happens If You Opt Out

If you turn off Salesforce access to Customer Data in your org after it has been turned on:

- No new data is shared. For service improvement purposes, Salesforce retains your collected data for up to 30 days, after which it's deleted and can't be recovered.
- No Salesforce employee will view your Customer Data outside of a support case, a pilot, or as otherwise described in your legal agreements.

Opting out of data sharing can have these impacts:

- Your org won't be able to participate in pilot programs or get early access to Agentforce and Einstein features.
- Search results can be less relevant for terms specific to your Salesforce org or to your industry.

- Your org won't contribute to ongoing Salesforce efforts to improve certain products or services enabled in this org.

Learn More

- [Einstein and Data Usage](#)
- [Salesforce Einstein: Global Opt-out Process](#) (off-line alternative to this process)

AI Project Success

To get the most out of your AI project, plan for AI project success. Every project is different, so choose the topics that best suit your needs.

I want to...	Recommended Content
Implement a specific feature as quickly as possible.	Explore the feature documentation to implement a specific feature.
Learn how AI can add productivity to my business, or be inspired by use cases.	Learn How AI Can Transform Your Business External: AI Use Case Library
Evaluate a preexisting business process to add productivity with AI.	Identify AI Use Cases in Your Business Processes
Plan my company's AI strategy, identify use cases, and select the first project that adds the most value.	Define Your AI Strategy Trailhead: AI Strategy Trailhead: AI + Data Project Planning
Launch my company's first AI project, identify the data and customizations required for project success, and make sure it's built around trust.	Plan and Implement Your AI Project Prepare Your Data for AI Conduct a Risk Assessment for AI Projects Trailhead: AI + Data Project Planning

[Learn How AI Can Transform Your Business](#)

Where do you start with AI? Begin with inspiration for AI use cases and supplement those ideas with Trailhead resources. Here's some ways you can get inspired about use cases for AI. You can also use the Business Process Exercise to identify areas in your processes where AI can help make your team more productive.

Define Your AI Strategy

Bring an AI strategy to your company. Identify a vision, establish AI governance, define AI use cases, and develop your AI backlog.

Identify AI Use Cases in Your Business Processes

Examine your everyday operations and identify which business processes could benefit from implementing an AI solution.

Plan and Implement Your AI Project

Now that you've identified your first AI project, it's time to start preparing for a successful project launch.

Prepare Your Data for AI

Data preparation can make or break your AI project. Learn how to define your data requirements, create a data inventory, and evaluate the data for AI readiness.

Conduct a Risk Assessment for AI Projects

Identify the risks of using data with AI solutions and establish guardrails to keep customer data safe.

Learn How AI Can Transform Your Business

Where do you start with AI? Begin with inspiration for AI use cases and supplement those ideas with Trailhead resources. Here's some ways you can get inspired about use cases for AI. You can also use the Business Process Exercise to identify areas in your processes where AI can help make your team more productive.

Start with the [Salesforce AI Use Case Library](#).

Take some informative Trailhead modules:

- [Einstein Generative AI: Quick Look](#)
- [Artificial Intelligence for Business](#)
- [Artificial Intelligence for Marketing](#)
- [Data + AI + CRM: Quick Look](#)
- [Generative AI for Organizations](#)
- [Sales AI: Quick Look](#)
- [Agentforce Sales Actions for Sellers: Quick Look](#)
- [Einstein for Service: Quick Look](#)

Watch some helpful videos about AI:

- [How Do You Use Generative AI to Help Your Team Work Faster?](#)
- [How Do You Embed Generative AI in the Flow of Work?](#)

See Also

[Identify AI Use Cases in Your Business Processes](#)

[Trailhead: AI Strategy](#)

Define Your AI Strategy

Bring an AI strategy to your company. Identify a vision, establish AI governance, define AI use cases, and develop your AI backlog.

These steps provide the basic framework for developing your organization's AI strategy. For a more detailed and example-driven explanation of building an AI strategy, review the [AI Strategy module](#) on Trailhead.

Develop Your Company's Vision for AI

An AI vision statement articulates overarching goals that help focus your company's efforts. This vision statement can define broad business outcomes, such as improving sales productivity or reducing the open case time by a target percentage.

It's helpful to identify key stakeholders across your company who can help you refine these goals. These individuals aren't always directly involved in the specific projects, but they're invested in AI success overall. Key stakeholder roles can include:

- Executive leadership
- Business department leads
- Technical teams such as IT, Data Science, or Business Intelligence
- Legal and Security

Stakeholders can help your business identify cross-team goals and innovate ways to expand upon project success, such as modifying a successful AI project to work with a new business unit. Each time you build upon the success of a previous project, you increase your organization's ability and capacity to implement AI solutions successfully.

Establish AI Governance

A strong AI governance plan includes building a set of policies, processes, and best practices so that everyone uses and develops AI in a responsible and scalable manner. Collectively, these policies and guidelines align with your company's vision and applies to the inventory of current AI solutions used in your business. In addition, AI governance helps your team identify potential risks, address them with mitigation strategies, and ultimately guide your business toward its stated goals.

Identify AI Use Cases

Now that your team has solidified the vision and governance, your team can define AI use cases and prioritize them according to business impact and value. Identify use cases through crowdsourcing, by conducting business process analyses, and by reviewing market trends.

After you've identified a list of use cases, analyze them based on potential business value and ease of implementation. As you prioritize your projects, it's valuable to identify projects that build momentum.

To multiply impact, consider projects that use the same dataset or that can be easily replicated into additional business units or geolocations.

After you've identified your first AI project, add the other projects into a backlog for future evaluation.

See Also

[Identify AI Use Cases in Your Business Processes](#)

[Trailhead: AI + Data: Project Planning](#)

[Trailhead: AI Strategy](#)

Identify AI Use Cases in Your Business Processes

Examine your everyday operations and identify which business processes could benefit from implementing an AI solution.

Identify where AI solutions can help with a detailed review of your business processes. Having a goal of sales productivity gains is helpful, but implementing solutions that help you achieve that goal means taking a deep look at the associated processes and estimating how much productivity can be gained by implementing AI solutions. This analysis helps your key stakeholders understand the value added by investing in AI.

1. Write down the steps of the process. What's the sequence of tasks needed to achieve the results? Are approvals involved?
2. Identify who's involved in the process. Are certain individuals required or optional? Can you consolidate steps based upon the people involved?
3. Identify the involved systems and data. Are individuals required to access multiple systems while completing the task? If the system is down, is a backup system in place? What data sources must be accessed to complete the task? Can your process benefit from bringing outside data sources into Salesforce?
4. Estimate the amount of time each step typically takes. Use the best metric that works for your team, such as business days, hours, or minutes. Sometimes it helps to start with a rougher time estimate and then review these numbers with stakeholders to arrive at a more accurate estimate.
5. Review relevant AI solutions. A great place to start is the [Salesforce AI Use Case Library](#). Which solutions can work as is? Which ones can work with some customization? Which ones are analogous to what you want to build?
6. Identify the steps that AI can improve, and quantify the benefits.
 - a. Review those steps and estimate how much time can be saved per step. Check in with your colleagues who made the original estimates to confirm these time estimates.
 - b. Based on the time savings, calculate the amount of money saved in this business process by using AI. Determine whether the cost savings and productivity gains align with your company's AI vision.

See Also

[Trailhead: AI Strategy](#)

Plan and Implement Your AI Project

Now that you've identified your first AI project, it's time to start preparing for a successful project launch.

These steps provide the basic framework for planning an AI project. For a more detailed and example-driven explanation of the process, review the [AI + Data: Project Planning module](#) on Trailhead.

Identify Project Stakeholders and Goals

Project stakeholders are people who have an interest, influence, or impact on the project. Keep in mind that your project stakeholders are typically different from strategic, company-wide stakeholders for AI, although there might be a little overlap. Project stakeholders are dedicated to the implementation of that specific AI project, while strategic stakeholders manage the company-wide AI strategy.

Additionally, define the project success metrics. Aim to define a SMART goal: specific, measurable, achievable, relevant, and time-bound. For example, the objective for a customer service project might be to reduce the average case handling time by 20%, and the objective for a sales project might be to increase upsell conversion rates by 10%.

Consider the Technical Requirements

When you're getting started on an AI initiative, it's essential to assess the technical requirements of the project. Here are some of the questions to ask.

- What type of AI does the project require? Predictive, generative, or both?
- Does this solution need to integrate with other systems?
- Are there any out-of-the-box solutions you can use and customize, or do you need to build it yourself?
- If you choose to build it yourself, does your organization have the right in-house skills?
- What models, programming languages, frameworks, libraries, and tools will you use?
- How will you balance the trade-offs between accuracy and speed, complexity and simplicity, and innovation and cost?

If you're building your project in Salesforce, you must have Data 360 and Einstein Generative AI enabled in your org.

Identify the AI Solution

Identify which AI features can help move your project toward its goals. Then review the feature documentation to see whether the solution needs some customization in order to complete your goals. Examples of customization include:

- Updating prompt templates to include specific data fields
- Updating a flow to link into your Salesforce org's processes

Use your best effort in this exercise, but keep in mind that, to achieve the business results you want,

many AI solutions require some iterative refinement after the implementation. Include extra time for these refinements in the testing phase of development.

After you have your expected implementation steps, build out the project timeline. Include time for testing, and designate a pilot stage.

See Also

[Trailhead: AI + Data: Project Planning](#)

[Trailhead: AI Strategy](#)

Prepare Your Data for AI

Data preparation can make or break your AI project. Learn how to define your data requirements, create a data inventory, and evaluate the data for AI readiness.

The secret to AI project success is your data. High quality, unified data streamlines the learning process for AI algorithms, helping them operate more efficiently and produce more accurate results.

1. **Review the data requirements that you identified in the AI project planning stage.** What objects, fields, and external data sources are needed to make the features work correctly?
2. **Create a data inventory to help manage diverse data assets.** For example, you can list the project's required data sources, capture how the data is classified, how often the data is refreshed and so on. See [Data Fundamentals for AI](#).
3. **Evaluate whether the data is ready for AI.** What's the quality of the data? Do you need to establish governance for the data? Do you need to migrate and centralize the data?

After evaluating the data's readiness, you can start resolving the most critical data challenges, which typically include quality issues, integration hurdles, gaps in the data, and sometimes even outdated data infrastructure. If you don't resolve those issues early on, your AI project might be built on unreliable or inaccurate data.

For more detailed information about the process of preparing your data for AI, see the [AI + Data: Project Planning module](#) on Trailhead.

Conduct a Risk Assessment for AI Projects

Identify the risks of using data with AI solutions and establish guardrails to keep customer data safe.

Using customer data in your prompts results in better responses from the model. However, including business data in your prompts means that you're opening up your company to risks. Data leaks, regulatory issues, and reputational harm can happen if your data isn't handled with care.

After identifying the data that your AI project requires, you can establish risk mitigation strategies that are designed to keep that customer and business data secure.

1. Work with your project stakeholders to identify the likelihood of negative effects of each of these risk

types with the project data. You can use the [Plan Your Trust Strategy](#) unit in Trailhead to build a risk profile and mitigation strategy to share with key stakeholders.

2. Identify guardrails that can help your project mitigate legal and ethical risks. Many of these guardrails are covered by the [Einstein Trust Layer](#). AI guardrails include:
 - a. Security guardrails: Secure data retrieval means the prompt uses only data that the end user is allowed to access. Data masking replaces sensitive data with placeholder data so the model never sees the masked data. Zero data retention policies mean that data isn't stored in the model after the response is generated.
 - b. Technical guardrails: Prompt Defense protects the data from prompt injection attacks or jailbreaking.
 - c. Ethical guardrails: Toxicity and bias detection identifies harmful language in prompts and responses.
3. Build a list of potential risk areas and the specific guardrails that the system uses to mitigate risk.
4. Prioritize the risk mitigation strategies so that you tackle the most critical risks first.

See Also

[Trailhead: AI + Data: Project Planning](#)

[Trailhead: AI Strategy](#)

Design and Implement Agents

Agentforce is the agent-driven layer of the Salesforce Platform, and it helps you deploy AI agents that work side-by-side with your employees to extend your workforce and serve customers 24/7. Agentforce includes a set of tools to create and customize agents for use cases across sales, service, marketing, commerce, Slack, and more.

REQUIRED EDITIONS



Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

Your Path to Agentforce Success

Ideate Your Solution Agentforce: Agent Planning	Set Up Your Salesforce Org Set Up Your Agent	Build Your Agent Agentforce Implementation Guide

 Plan Your AI Agent  AI Project Success  Autonomous Agents  What Are Agents?  Agent Types and Considerations	 Trusted Agentic AI  Einstein Trust Layer  Data 360-Powered Agentforce  Ground Agentforce in Your Data  Grounding an Agent with Data  Agentforce Data Library  Retrieval Augmented Generation	 Configure Your Agent  Agentforce Builder Basics  Quick Start: Build a Service Agent with Agentforce  Quick Start: Create Employee Agents in Agentforce  Agent Customization: Quick Look  Agentforce Decoded for Admins  Extend Your Agentforce Implementation  Agentforce Workshop
 <h3>Test Your Agent</h3>  Agentforce Testing Tools and Strategies  Troubleshooting Agents  Agentforce Testing Center  Test an Agent in Agentforce Testing Center  Agentforce Testing Center	 <h3>Deploy Your Agent</h3>  Agentforce Deployment: Quick Look  Deploy Your Agent to Channels  Connect a Service Agent to Telephony in the Legacy Builder  Route Voice Conversations to AI Agents  Change Management for AI Implementation	 <h3>Monitor Your Agent</h3>  Monitor and Improve an AI Agent  Agentforce Analytics and Monitoring  Agent Analytics  Agent Optimization  Einstein Audit and Feedback Data



Build Enterprise-Ready Agents with the New Agentforce Builder

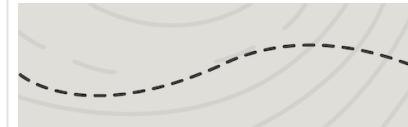
Build context-aware agents with the predictability that your business demands and the flexibility that LLMs make possible.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

Get to Know the New Agentforce Builder

		
<p>What's New in Agentforce Builder</p> <p>Access Agentforce Studio and the New Agentforce Builder</p> <p>Explore the New Agentforce Builder</p> <p>Agentforce Builder Limitations</p>	<p>What's New in Agent Logic & Reasoning</p> <p>How Agents Work</p> <p>Building Agents in Canvas View</p> <p>Get to Know Agent Script</p> <p>Agent Script Developer Guide</p>	<p>What's New in Agent Topics</p> <p>Parts of a Topic</p> <p>Topic Classification and Routing</p> <p>How Topic Instructions are Resolved to Build a Prompt</p>

Build, Customize, and Test Agents in the New Agentforce Builder

		
<p>Create and Set Up Your Agent</p> <p>Create an Agent</p> <p>Versioning, Editing, and Deleting Agents</p> <p>Define Agent-Level Instructions and System Messages</p> <p>Update Language Settings</p>	<p>Configure and Test Your Agent</p> <p>Manage Topics</p> <p>Manage Actions</p> <p>Manage Variables</p> <p>Preview and Test Your Agent</p>	<p>Deploy and Activate Your Agent</p> <p>Set Up Connections</p> <p>Connect Your Agent to Enhanced Chat v1</p> <p>Transfer Conversations from an Agent with an Omni-Channel Flow</p>

		Activate or Deactivate Your Agent
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Create Agents in Record Time with Agentforce Implementation Guides

Build an AI agent for Agentforce's top use cases in record time with the Agentforce Implementation Guides.

Using a [Developer Edition org](#), you can create a customer-facing agent that answers questions from a knowledge base and escalates for further assistance. No endless clicking, just download the PDF and go!

Get the Customer-Facing Agents Guide
Get the Employee-Facing Agents Guide

Watch this video to learn about Agentforce Implementation Guides.

Watch the video: <https://play.vidyard.com/CeDiiGV21GNSCVehnxrats>

Who is Makana Medical Devices?

Makana Medical Devices is a medical device company that develops, manufactures, and distributes a wide range of diagnostic, treatment, and patient monitoring instruments. They've already integrated [generative AI](#) into their Salesforce ecosystem and are now looking to build their first agents.

Makana's Customer-Facing Agent Helps Customers Find Information Fast

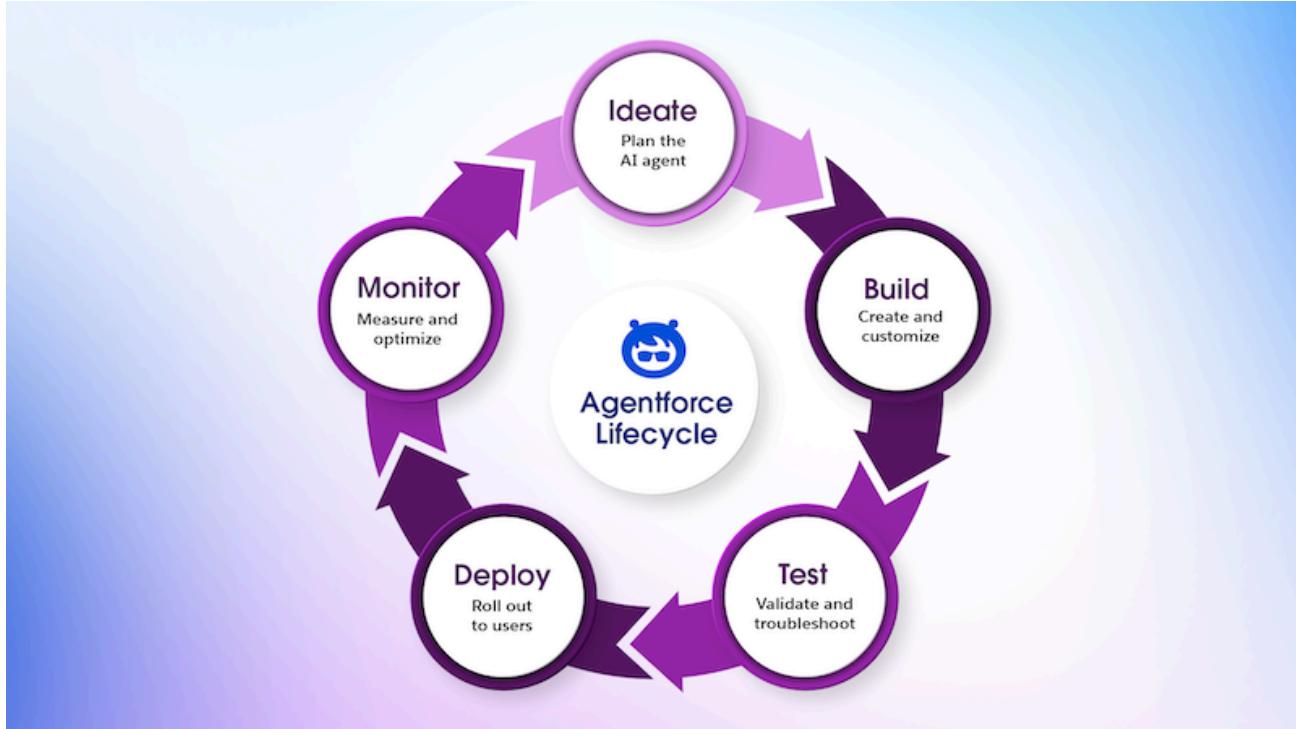
Makana wants to increase their case deflection rate, their first contact resolution, and their CSAT by launching an external-facing agent that lives on their website. This agent is powered by Agentforce Data Libraries that ingests a PDF of information and answers questions. If the agent can't answer a question, the agent creates a case so a human can step in to help.

Makana's Employee Agent Creates Opportunities Everywhere

Makana wants to grow their pipeline and enable their Sales teams to create opportunities wherever they go! This agent creates an opportunity record using natural language, evaluates it to identify expert colleagues who can help close the deal, and automatically creates tasks to connect with the recommended team members.

Follow the Agent Development Cycle

Building agents is easy when planned correctly! Using our Agent Development Cycle, you can follow Makana through the major stages of development: from ideating the first use cases to supervising the agent after launch.



Our guides provide helpful frameworks for you to share your plans with your key stakeholders.

Task	Customer Agents
Ideate Agents	<ul style="list-style-type: none"> • Identify Your Use Case • Define Technical Requirements • Define Agent Guardrails • Design your Agent
Build Agents	<ul style="list-style-type: none"> • Set Up your Agent • Create Your Agent from a Template • Customize Topics and Actions
Test Agents	<ul style="list-style-type: none"> • Build your Testing Plan • Manual Testing • Batch Testing

Task	Customer Agents
	<ul style="list-style-type: none"> • Troubleshooting Agents
Deploy Agents	<ul style="list-style-type: none"> • Create an Omni-Channel Flow • Launch your Agent on Channels • Voice
Supervise Agents	<ul style="list-style-type: none"> • Post-Deployment • Root Cause Identification • Prepare for Improvement

[Get the Customer-Facing Agents Guide](#)

[Get the Employee-Facing Agents Guide](#)

Ideate Your Agentforce Solution

Build your Agentforce solution from the ground up by understanding the basics of a successful AI project. Then, learn about the basics of agents so that you can get started quickly.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

[What Are Agents?](#)

Agents are goal-oriented, autonomous AI assistants that perform tasks and business and make data-driven decisions. Learn more about agents and how they compare to Einstein Bots.

[Agent Types and Considerations](#)

Learn about agent types and default templates for specific clouds and common use cases.

[Agent Execution Context and Data Access by Type](#)

Learn how Agentforce Employee, Lead Nurturing (Sales), and Service agents run actions and how data access is controlled for each agent type.

[Plan Your AI Agent](#)

Planning an AI agent is crucial for several reasons. It ensures that your AI project aligns with your company's overall AI strategy and business goals. It also helps you define the agent's work and assess its potential impact on the organization.

What Are Agents?

Agents are goal-oriented, autonomous AI assistants that perform tasks and business and make data-driven decisions. Learn more about agents and how they compare to Einstein Bots.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

Agents are goal-oriented, autonomous AI assistants that perform tasks and business interactions. They can initiate and complete a sequence of tasks, handle natural language conversations, and securely provide relevant answers drawn from business data. Some agent types are best at assisting and collaborating with a Salesforce user in the flow of work. Other types can also act on behalf of a user or customer, based on the use cases and guardrails an admin specifies. Agents adapt and improve with each interaction.

Some agent types are available in your Salesforce interface, and you can add some to your customer channels.

Agents respect standard Salesforce access controls such as licenses and permissions, so they always act securely. Agents also include AI guardrails designed to help meet ethical standards and are integrated with the Einstein Trust Layer, a secure AI architecture natively built into the Salesforce Platform.

Agents help with a variety of use cases.

Use Case	How Agents Can Help
Intelligently automate repetitive tasks.	Agents perform common tasks autonomously, such as updating a Salesforce record, answering a simple question, or drafting an email. During a conversation, an agent determines which actions are required for the task at hand and performs those actions automatically.
Provide personalized customer service experiences.	Agents can generate context-aware responses to employee and customer inquiries. Their answers are securely grounded in business data. For more complex issues, agents can automatically escalate the conversation to a live agent.
Get data-driven insights about a specific Salesforce record or page.	Agents can assist users in their flow of work in Salesforce. For example, they can summarize a case and suggest actions based on the page a user's viewing.

Use Case	How Agents Can Help
Get assistance with complex, creative tasks.	Agents can generate drafts for a variety of content types, including emails, newsletters, and text messages. They can also help users brainstorm and plan creative projects.

Agentforce is included as a Covered Service in the Einstein Platform and Agentforce SOC 2 and SOC 3 reports. Agentforce is HIPAA eligible and covered under the Salesforce [Business Associate Addendum Restrictions](#), and has also achieved ISO 27001, 27017, and 27018 certifications.

Differences Between Agents and Einstein Bots

Einstein Bots use predefined rules and scripted responses to navigate conversations. They excel at following strict processes and adhering to brand messaging guidelines.

When choosing whether to build an agent or a bot, consider your goals, your users, and the channels you want to deploy your conversational AI solution to. Each solution has different strengths.

Einstein Bots are well suited for scenarios where you want more transparency and control over conversations. Example scenarios:

- You're in a regulated industry that requires explainable processes with extra governance.
- You want the chatbot to follow highly specific, deterministic conversation flows.
- You want to use generative AI in specific conversation flows only.

Some key differences between Einstein Bots and agents include:

- How they converse: Einstein bots offer scripted replies to user queries, making them suitable for straightforward or transactional interactions. Agents engage in fluid conversations and use conversation context to inform their decisions.
- How they process intent: Einstein bots are limited to predefined dialogs and rules. Because agents are built on LLMs, they're more effective at interpreting the underlying intent of messages and providing accurate and contextually relevant answers.
- How they're built: Einstein bots are built on simple intent models and follow hard-coded dialogs. They often require more extensive setup and training than agents. Agents are built on LLMs trained on vast amounts of data and decide what to do using topics and actions.

Feature	Agents	Einstein Bots
Built into the Salesforce interface	✓ Depends on the agent type	✗
Can be added to enhanced messaging channels	✓ Depends on the agent type	✓
Integrated with the Einstein Trust Layer	✓	✗

Feature	Agents	Einstein Bots
Context of an ongoing conversation	✓	✗
Can leverage a knowledge base	✓	✓

The Building Blocks of Agents

Agents have five components: the agent, topics, actions, the reasoning engine, and the large language model (LLM).

How Agents Work

Follow the path of a user message through the Atlas reasoning engine to learn how Agentforce agents reason, take action, and generate responses.

How Agents Created in the Legacy Builder Work

Follow the path of a user message through the Atlas reasoning engine to learn how an agent built in the legacy Agentforce Builder reasons, takes action, and generates responses.

Trust and Agentforce

With Salesforce, it's easy to build safe AI agents because agents are designed to help mitigate the risks associated with generative AI technology.

Agentforce Glossary of Terms

Learn more about the terms used in Agentforce and generative AI at Salesforce.

Agentforce Considerations

Carefully review the support, limits, and considerations for AI agents.

Agentforce Builder Considerations

Carefully review the current considerations and limitations for the new Agentforce Builder. Keep an eye on our release notes for ongoing improvements as we work toward general availability.

Agents and Data Usage

As an Einstein customer, it's important for you to know what data is being used by agents.

See Also

[Salesforce Blog: What's the Difference Between an AI Agent and a Chatbot?](#)

[Chat with Customers with Einstein Bots](#)

The Building Blocks of Agents

Agents have five components: the agent, topics, actions, the reasoning engine, and the large language model (LLM).

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

Agent

Agents are trusted conversational AI assistants. They increase productivity and reduce your teams' workload by automating routine tasks and assisting with complex ones. They're more autonomous than other conversational AI solutions, so they can independently identify opportunities for action, anticipate next steps, and initiate tasks within the use cases and guardrails you specify. Some agent types can be launched to customer channels.

Actions and Topics

An agent includes a library of topics and actions.

Actions are how an agent gets things done. An action is an individual task the agent can perform. For example, if a user asks an agent for help with writing an email, the agent can launch an action that drafts and revises the email and grounds it in relevant Salesforce data. Salesforce provides some standard actions for common Salesforce tasks by default, and you can create custom actions specific to your business use cases.

A topic is a category of actions related to a particular job to be done. For example, a topic called Deal Management can contain agent actions that help a sales rep get up to speed on their day, find relevant opportunities and contacts, create to-do items, and log calls. Topics contain actions, which are the tools available for the job, and instructions, which tell the action how to make decisions.

When an agent is triggered, or when a user enters a question or request in an agent conversation, an agent compares the task or user utterance to the names and classification descriptions of all of the topics assigned to it. The agent then classifies the task or utterance into the most relevant topic. Based on the selected topic's actions and instructions, the agent can launch one or more actions. Or if the agent is chatting with a user, the agent can prompt the user for additional information (for example, a clarifying question or the required input for an action).

Reasoning Engine

The reasoning engine orchestrates how an agent launches topics and actions during a conversation to accomplish a task for the user.

When an agent is triggered or when a user asks a question or makes a request, the reasoning engine works with the LLM behind the scenes. Here's what it does.

- Interprets the trigger or user request and classifies the utterance into a topic.
- Iteratively builds plans for accomplishing a goal.
- Finds and launches the right topics and actions to achieve the goal.

Large Language Model (LLM)

Agents are AI assistants, and they harness the power of an LLM to communicate with users and take

action in your org.

The reasoning engine calls the LLM at different times during a task or interaction with a user. The number and size of the LLM calls depends on the task and which topics and actions are launched.

See Also

[Agent Actions](#)

[Topics in the Legacy Builder](#)

[Video: How the Atlas Reasoning Engine Works](#)

How Agents Work

Follow the path of a user message through the Atlas reasoning engine to learn how Agentforce agents reason, take action, and generate responses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

The Atlas reasoning engine is a graph-based reasoning engine. You can think of it like a flowchart with nodes, variables, and transitions, so agents follow specific, predictable paths. Unlike strictly prompt-based reasoning engines, Atlas separates an agent's big-picture workflow from its conversational skills. It uses Agent Script, the language for building agents in Agentforce Builder, to combine programmatic expressions with natural language instructions. The result is hybrid reasoning, which gives you the predictability and control that enterprise demands and the flexibility and creativity that large language models (LLMs) make possible.

 **Note** The number and size of LLM calls in an agent conversation depends on the complexity of the task and which topics and actions are used. [Learn more about large language model support for Agentforce.](#)

Step 1: A user sends a message

The process begins when a user enters a question or request.

Step 2: The agent goes to a starting topic

The agent moves to the topic defined as the starting topic. In Agent Script, this is whatever topic uses the `start_agent` prefix instead of the `topic` prefix. By default, this is the [Topic Selector](#), which guides the agent to select a topic based on the recent conversation history and the topics available to the agent.

Step 3: The agent resolves the topic instructions from top to bottom

After the agent selects a topic, it begins [resolving the topic's reasoning instructions](#) deterministically, in the order that they're written. At this stage in the topic's execution, no reasoning takes place, so the agent doesn't rely on an LLM yet.

If at any point in the reasoning instructions the agent executes a transition to another topic, the agent redirects the conversation before the instructions are resolved and any reasoning occurs. Otherwise, when all reasoning instructions have been resolved, the resulting reasoning instructions, including any natural language instructions, are used to build a prompt.

Step 4: The agent builds a prompt

The agent uses the reasoning instructions to build a prompt to send to the LLM and kick off the reasoning process. The prompt includes:

- Agent-level instructions, which apply to every agent interaction
- The recent conversation history, including the user's most recent message
- The resolved topic reasoning instructions
- [Reasoning actions](#) included in the topic, which are the actions (including agent actions) an agent is allowed to take during its reasoning process

Step 5: The agent sends the prompt to the LLM to begin reasoning and take action

The agent uses the LLM to analyze the available information in the prompt and determine its next steps.

- Run an agent action or utility, based on the logic defined for the action or utility and any descriptions, inputs, and outputs
- Ask the user for more information
- Ask the user clarifying questions to disambiguate between available options
- Respond directly to the user's question or request, if the user's question or request can be resolved with information the agent already has access to

When the agent runs an action, it checks the result in a reasoning loop to make sure it has the right information before responding to the user. The agent adds the action output to the information it already has about the conversation. Then it decides whether to run another action, ask the user more questions, or send a final response. This process continues up to seven reasoning loops.

Step 6: The agent performs a final response validation (Agentforce Service agents only)

Before an Agentforce Service agent sends a response, it checks whether the response is grounded in data sources, adheres to the topic's scope and instructions, and doesn't include hallucinations, unverified

information, or potential prompt injection risks. If the proposed response fails this validation, the agent generates a new response.

 **Note** Agents stream LLM responses in conversations as the responses are received. The response validation is applied to the final agent response. If a proposed response fails this validation after the response has started streaming, the response is deleted and a new response is generated.

If the agent can't generate a response that passes validation, it informs the user that it can't help with their question or request.

Step 7: The agent sends a response to the user

After the agent completes the reasoning loop, it sends a message to the user. The user can continue the conversation by asking a follow-up question or changing the subject, and the agent responds appropriately. Behind the scenes, the user's response restarts the journey, but to the user, it feels like they're taking turns in a conversation.

How Agents Created in the Legacy Builder Work

Follow the path of a user message through the Atlas reasoning engine to learn how an agent built in the legacy Agentforce Builder reasons, takes action, and generates responses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.



You can think of the reasoning engine as a series of carefully orchestrated prompts sent to a large language model (LLM). Each step in the agent's iterative classification and reasoning represents one or

more LLM calls. The number and size of LLM calls depends on the complexity of the task and which topics and actions are used. [Learn more about large language model support for Agentforce](#).

Step 1: A user sends a message

If an agent uses a conversational interface, the process begins when a user enters a question or request.

Agents that operate in the background behave differently.

- [Agentforce SDR agents](#)—The process begins when the agent initiates contact with a prospect based on a lead assignment, schedule, and other engagement rules that you set.
- [Agents called from an Apex class or flow](#)—The process begins when the agent is triggered based on the conditions you set. When you configure your Apex class or flow, you define the agent's task by specifying a sample user message. The agent uses the same user message to search through the topics and actions assigned to it, just like if a user had asked a question or made a request in a chat window.

Step 2: The agent classifies the user's message into a topic

The agent selects the best matching topic based on what the user wants to do and the jobs that the agent can do. To do this, the reasoning engine compares the recent conversation history, including the user's most recent message, to the names and classification descriptions of all the topics available to the agent. Topics with a filter applied are included only if the filter conditions are met.

After a topic is selected, the reasoning engine collects all of the information that the agent needs to determine its next step.

- The recent conversation history, including the most recent user message (on average, the last six turns of the conversation).
- The topic's name, scope, and instructions.
- The names and instructions, including input and output instructions, of the actions included in the topic. Actions with a filter applied are included only if the filter conditions are met.

Then the agent moves on to the reasoning process.

If the reasoning engine can't find an appropriate topic, the agent moves to an Off-Topic system topic and tries to bring the conversation back to the topics assigned to it.

Step 3: The agent begins the reasoning process and takes action

After the agent has selected a topic, it analyzes the available information to determine its next step.

- Run an agent action

If the agent needs to retrieve or update information, it can use one or more agent actions to call a Salesforce service, such as an Apex class, flow, or prompt template. [Learn more about agent actions](#). An agent also uses actions to ground a response in trusted business data and other sources, such as knowledge articles and external websites. [Learn more about grounding agents in your data](#).

- Ask the user for more information
If the agent requires information outside the conversation history, the agent can ask the user directly.
- Ask the user clarifying questions
The agent can ask follow-up questions to disambiguate between available options.
- Respond directly to the user's question or request
If the user's question or request can be resolved with information the agent already has access to, the agent can respond without running additional actions.

The agent's decision-making is heavily influenced by topic instructions. For example, if a topic instruction specifies that the agent should always ask for a model number before answering a product-related question, the agent requests the information before moving to the next step. Or if a topic instruction specifies that the agent must verify a customer's identity before providing account information, the agent moves to a customer verification topic before fulfilling the user's request. [Learn more about topic instructions](#).

When the agent runs an action, it checks the result in a reasoning loop to make sure it has the right information before responding to the user. The agent adds the action output to the information it already has about the conversation. Then it decides whether to run another action, ask the user more questions, or send a final response. This process continues up to seven reasoning loops.

Step 4: The agent performs a final response validation (Agentforce Service agents only)

Before an Agentforce Service agent sends a response, it checks whether the response is grounded in data sources, adheres to the topic's scope and instructions, and doesn't include hallucinations, unverified information, or potential prompt injection risks. If the proposed response fails this validation, the agent generates a new response.

-  **Note** Agents stream LLM responses in conversations as the responses are received. The response validation is applied to the final agent response. If a proposed response fails this validation after the response has started streaming, the response is deleted and a new response is generated.

If the agent can't generate a response that passes validation, it informs the user that it can't help with their question or request.

Step 5: The agent sends a response to the user

After the agent completes the reasoning loop, it sends a message to the user. The user can continue the conversation by asking a follow-up question or changing the subject, and the agent responds appropriately. Behind the scenes, the user's response restarts the journey, but to the user, it feels like they're taking turns in a conversation.

Trust and Agentforce

With Salesforce, it's easy to build safe AI agents because agents are designed to help mitigate the risks associated with generative AI technology.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

The Agentforce platform is integrated with the Einstein Trust Layer, and the feature includes AI guardrails. Agents also respect standard Salesforce access controls.

Einstein Trust Layer

Agentforce is integrated with the Einstein Trust Layer, which is a secure AI architecture natively built into Salesforce.

Designed for enterprise security standards, the Trust Layer lets you benefit from generative AI without compromising your customer data. It also lets you use trusted data to improve generative AI responses.

Einstein Trust Layer service	Description
Zero Data Retention Policy	Einstein Trust Layer uses a zero-data retention policy, so no data is stored or used for model training by third-party LLMs. Customers' use of other features including agents may result in data storage. For more information, contact your Salesforce account executive.
Dynamic Grounding with Secure Data Retrieval	Relevant information from trusted company data, your knowledge base, or other sources you configure, is used to answer a question.
Prompt Defense (System policies and prompt injection detection)	System policies help limit hallucinations and decrease the likelihood of unintended or harmful outputs by the LLM.
Toxicity Detection	Potentially harmful LLM responses are detected and flagged.
Audit and Feedback	Prompts, responses, and trust signals are logged and stored in Data 360, giving you visibility into the results of each user interaction. Feedback can be used for improving instructions, prompt

Einstein Trust Layer service	Description
	templates, and more.

Data masking through the Einstein Trust Layer is disabled to improve the performance and accuracy of agents. All data accessed by agents, including personally identifiable information (PII), is protected in transit and isn't stored or used for training purposes by external LLM providers, as part of our strict zero-data retention policy. See [Data Masking Limitations in Agentforce](#).

AI Guardrails

The Agentforce platform includes ethical guardrails to minimize AI hallucinations and security guardrails to prevent threats and malicious attacks, such as prompt injections.

For more granular control, use agent topic instructions to create boundaries, set context, and define agent behavior. You can modify the instructions for a standard agent topic, or you can create a custom topic from scratch. Use [instruction adherence](#) to see how well the agent is interpreting and following the topic instructions.

Different agent types can have their own settings and guardrails to define agent behavior. For example, Agentforce Service agent templates use topic instructions to determine when to escalate a conversation from the agent to a service rep. The SDR agent type has admin-defined engagement rules for the conditions when the agent can start working on the lead and how and when agent emails can be sent.

Permissions and Access

AI agents respect standard Salesforce access controls such as licenses, permissions, field-level security, and sharing settings, so an agent always acts securely.

- **Agent types:** The default Agentforce agent is available to admins and users with the Agentforce Default permission sets. Some agent types are built to work with specific clouds or licenses, so they require another license.
- **Standard Agent Topics:** Many standard topics are available to all users who have permission to access the default Agentforce agent.
- **Standard Agent Actions:** Many standard actions are available to all users who have permission to access the default Agentforce agent. Some standard actions are built to work with specific clouds or products, so they require another license or permission.
- **Custom Agent Actions:** Access to a custom action depends on the Apex class, flow, or prompt template the action references. For example, if a custom action is built using a flow, the custom action adheres to the permissions, field-level security, and sharing settings configured in the flow.

Trusted URLs

Agentforce enforces your business's trusted URL allowlist. This prevents your agent from calling or generating any malicious links and keeps your sensitive data secure.

When an agent attempts to include an unapproved URL in a response, the unapproved URL is replaced with “URL_Redacted.” We also show an error message in the plan canvas when the agent attempts to call or generate an unapproved URL, so you can evaluate whether a blocked URL should be allowlisted or removed from your agent’s configuration.

When [citations](#) are configured for your agent, source URLs used to generate agent responses are shown in the agent conversation, even if the domain isn’t included in your trusted URLs.

To use a URL with an agent, [add it to your trusted URLs](#).

Agent Compliance

Agentforce is included as a Covered Service in the Einstein Platform and Agentforce SOC 2 and SOC 3 reports. Agentforce is HIPAA eligible and covered under the Salesforce [Business Associate Addendum Restrictions](#), and has also achieved ISO 27001, 27017, and 27018 certifications.

Data Masking Limitations in Agentforce

In Einstein Trust Layer, pattern-based and field-based data masking for large language models (LLMs) is disabled for agents.

See Also

[Einstein Trust Layer](#)

[Topics in the Legacy Builder](#)

[Best Practices for Topic Instructions in the Legacy Builder](#)

Data Masking Limitations in Agentforce

In Einstein Trust Layer, pattern-based and field-based data masking for large language models (LLMs) is disabled for agents.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

Although masking can help protect sensitive and personally identifiable information from exposure to the LLMs, in some cases, it can affect the accuracy and relevance of the agent’s response because the context needed for the response is masked. For example, if a user asks an agent to build a list of similar accounts, the details of the reference account are important context information. If the reference account is masked from the prompt before sending it to the LLM, it doesn’t have the contextual information needed to identify accounts with similar characteristics.

Einstein Trust Layer includes several policies and features to help protect sensitive data from misuse or leaks beyond data masking.

All information sent to an LLM outside of the Salesforce trust boundary is subject to our zero data retention contract with the LLM provider. Information sent to the LLM is not retained, viewed, or used for training by the provider after the generated response has been sent back to Salesforce.

A custom action based on a prompt template, Apex, or the Models API can reference Salesforce-managed LLMs, including those hosted within the Salesforce trust boundary, such as the Anthropic Claude model. When using an LLM hosted within the Salesforce trust boundary, the data doesn't leave the Salesforce trust boundary. Data masking remains disabled for agents in this case, but the data stays within the Salesforce trust boundary, and our zero data retention policy still applies.

-  **Note** A prompt template can be used directly in Salesforce apps and through agent actions. When a prompt template is called through an agent action, data masking is disabled. When a prompt template is used directly, for example, in service replies, data masking is applied based on the configuration in the Einstein Trust Layer.

Agentforce Glossary of Terms

Learn more about the terms used in Agentforce and generative AI at Salesforce.

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#)

A

Agent

Goal-oriented, autonomous AI that performs tasks and business interactions and provides relevant answers drawn from business data. An agent is more autonomous than other conversational AI solutions, so it can independently identify opportunities for action, anticipate next steps, and initiate tasks within the use cases and guardrails you specify. Some agents initiate and complete tasks on behalf of a user. Others assist users with tasks and questions in the user's flow of work.

Agents can be deployed to customer or employee channels, depending on the associated agent type.

An agent can be created from a template or from scratch. An agent contains topics and actions.

See [What Are Agents?](#)

Agent action

A function your agent executes on the platform to get information and perform tasks. In other words, an action is how an agent gets things done in Salesforce. An agent action includes:

- A natural language name and instructions that tells the agent how and when to use the action,

how to retrieve required inputs, and how to format and use outputs.

- The Salesforce functionality that the agent action calls to get information or perform a task, called a reference action. For example, an agent action can call an API to retrieve data, a flow to update a record, a prompt template to generate a response, an Apex class to run custom business logic, or a predictive model to make a recommendation.

Agent assets

Refers to the topics, actions, filters, variables, surfaces, and default settings (such as system messages) assigned to an agent.

You can view assets available for your agents in the asset library. You can view and manage the assets assigned to your agent in Agentforce Builder.

Agent surface

Gives an agent context about a specific channel, interface, or app it's deployed to. Each surface includes behind-the-scenes instructions that tell an agent how to reason and respond appropriately for one or more channels. Surfaces also contain adaptive response formats, which tell an agent how to structure responses and let it deliver multimedia content, such as images, buttons, links, and videos, on a variety of channels.

See [Deploy Your Agent to Channels](#).

Agent template

A blueprint for an individual agent designed for a particular use case. It contains topics, actions, filters, variables, and system messages. When you create an agent from a template, you can choose which assets from the template to include.

An agent template is a child of an agent type. A type can be associated with many templates, but a template can only be associated with one type. For example, Agentforce Service Agent (ASA) is an agent type that connects to customer channels. To create an agent from a template of the ASA type, you need the required permissions for ASA and any permissions associated with the template.

See [Create an Agent](#).

Agent topic

A particular job an agent can do. A topic contains actions, which are the tools available for the job, and instructions, which tell the agent how to make decisions. Collectively, the topics assigned to your agent define the capabilities your agent can handle.

When an agent is triggered, or when a user enters a question or request in an agent conversation, an agent compares the task or request to the names and classification descriptions

of all of the topics assigned to it. The agent then classifies the task or request into the most relevant topic. Based on the selected topic's actions and instructions, the agent can launch one or more actions. Or if the agent is chatting with a user, the agent can prompt the user for additional information (for example, a clarifying question or the required input for an action). To learn more, see [How Agentforce Works](#).

Topics can be standard (Salesforce-provided) or custom. Standard topics are available out of the box in the asset library or assigned to a new agent by default.

See [Agent Topics](#).

Agent type

A broad category of agents that share similar capabilities and constraints. A type controls permissions required to build or access an agent and the channels that an agent can be deployed to. For example, agents of the Agentforce Service Agent type can be deployed to customer channels, such as Enhanced Chat. Agents of the Agentforce Employee Agent type can be deployed to employee channels, such as Slack.

An agent type is a parent of an agent template. Each agent type is associated with a default template for that type (usually of the same name as the agent type), as well as other templates.

A type can be associated with many templates, but a template can only be associated with one type. For example, Agentforce Service Agent (ASA) is an agent type that connects to customer channels. To create an agent from a template of the ASA type, you need the required permissions for ASA and any permissions associated with the template.

See [Agent Types and Considerations](#).

Agent user, Agent's user record

A Salesforce integration user with all the permissions that the agent needs to do its job. You can create an agent user in the Agent Creator guided setup when you create an agent that connects to customer channels.

An AI agent can interact with employees or customers. Most agents that interact with employees run in the context of the logged-in user. However, agents connected to customer channels chat with a broad set of users, including unverified users. To securely access data and perform actions that an end user doesn't have access to, the agent operates as an agent user. The permissions that you give to an agent user determines the actions that the associated agent can take.

See [Best Practices for Agent User Permissions](#).

Agentforce Data Library

Agentforce Data Library provides grounding information for agents. Create a data library to index

knowledge articles and fields, file uploads, or web sources. Indexes enable AI agents to retrieve and use relevant, accurate information for LLM prompts.

See [Agentforce Data Library](#).

Agentic feature, Agentforce feature

A generative AI solution that uses the LLM gateway and the reasoning engine (usually branded as “Agentforce.”) An agentic feature is often a conversational experience with a chat UI, but others operate in the background.

Artificial intelligence (AI)

A branch of computer science in which computer systems use data to draw inferences, perform tasks, and solve problems with human-like reasoning.

B

Bias

Systematic and repeatable errors in a computer system that create unfair outcomes, in ways different from the intended function of the system, due to inaccurate assumptions in the machine learning process.

C

Channel

A messaging platform, app, or interface that you can deploy an agent to. Employees and other internal stakeholders can interact with agents in Salesforce, Slack, and other employee channels. Customer channels, such as messaging platforms and email, are where your customers can interact with an agent.

See [Deploy Your Agent to Channels](#).

Chunking

The process of breaking unstructured data into manageable, semantically meaningful chunks that can then be turned into [vector embeddings](#). Chunking strategies vary depending on the context of the content being chunked.

See [Chunk Data](#).

Citation

Citations link AI-generated responses to the grounding sources that are relevant to the response. Citations allow users to see what information the large language model (LLM) used to generate the response, and to verify the validity of the source data.

See [Build Trust in AI Responses with Citations](#).

Connection

A connection includes all of the components and settings that help your agent connect to a specific channel, including a surface, adaptive response formats, and connection settings. You can also find the Omni-Channel flows that route conversations to and from an agent in your connection settings.

See [Deploy Your Agent to Channels](#).

Conversation recommendations (Lightning Experience and mobile only)

Clickable suggested requests or questions that appear directly in the Agentforce conversation panel and persist even when the user moves to a new page. Formerly known as Recommended Actions.

D

Digital Wallet

An account management tool that offers near real-time consumption data for enabled products across your active contracts. Use Digital Wallet to track your org's Agentforce usage and credit consumption against generative AI usage types.

See [About Digital Wallet](#) and [Generative AI Usage and Billing](#).

E

Embedded feature, Einstein feature

A non-Agentforce feature (usually branded as “Einstein”) that uses AI. It can be a predictive AI solution, or it can be a generative AI solution that uses the LLM gateway and doesn't use the reasoning engine.

F

Filter

Limits access to topics and actions based on conditions and variables you specify. When you apply a filter to a topic or action, the agent can only use the asset when the filter conditions are met.

[Create a Filter to Control Access to Topics and Actions in the Legacy Builder.](#)

Fine-tuning, Tuning

The process of adapting a pre-trained language model for a specific task by training it on a smaller, task-specific dataset.

Fine-tuning can also more generally refer to the process of testing and refining instructions to improve prompt performance.

Follow-up actions (Lightning Experience only)

Context-sensitive actions that appear in the Agentforce conversation panel after a user completes a specific standard action. These actions guide users through a natural workflow by suggesting the next logical step based on the previous action's output. By definition, follow-up actions can't be executed on their own. They can only follow a standard action (for example, you can't 'refine an email' without first 'drafting an email').

G

Generative AI gateway, Einstein gateway, the gateway

Exposes normalized APIs to interact with foundation models and services provided by different vendors, internally and from the partner ecosystem.

Generative pre-trained transformer (GPT)

A family of language models trained on a large body of text data so that they can generate human-like text.

Grounding

The process through which domain-specific knowledge and customer information is added to a prompt to give the model the context it needs to respond more accurately.

See [Ground Agentforce in Your Data.](#)

H

Hallucination

A type of output where a model generates semantically correct text that is factually incorrect or makes little to no sense, given the context.

Human in the loop (HITL)

A model that requires human interaction.

Hyperparameter

A parameter used to control the training process. Hyperparameters sit outside the generated model.

I

Instructions

Instructions describe a task to a LLM using natural language. Instructions are the basis of prompt templates. In Agentforce, instructions include agent topic instructions, agent action instructions, and user input to the agent. Instructions can be chained together into a series to better explain a task to an LLM.

Intent

An end user's goal for interacting with an AI agent.

L

Large language model

A language model consisting of a neural network with many parameters trained on large quantities of text.

Agents harness the power of a large language model (LLM) to communicate with users and take action in your org. Agents make reasoning engine calls to the LLM at different times during a task or interaction with a user. The number and size of the LLM calls depends on the task and which topics and actions are launched.

See [How Agentforce Works](#).

M

Machine learning

A subfield of AI specializing in computer systems that are designed to learn, adapt, and improve based on feedback and inferences from data, rather than explicit instruction.

Model card

Documents details about the model's performance as well as inputs, outputs, training method, conditions under which the model works best, and ethical considerations in use.

N

Natural language processing (NLP)

A branch of AI that uses machine learning to understand language as written by people. Large language models are one of many approaches to NLP.

O

Omni-Channel flow

A flow used to route conversations to or from an agent. Omni-Channel flows use the Route Work action to route conversations and their associated records, such as messaging session and email records. Agents that connect to customer channels have at least one inbound and outbound Omni-Channel flow.

See [Deploy Your Agent to Channels](#).

P

Parameter size

The number of parameters a model uses to process and generate data.

Prompt

A natural language description of the task to be accomplished. An input to the LLM.

Prompt design

Prompt design is the process of creating prompts that improve the quality and accuracy of a

model's responses.

Prompt engineering

An emerging discipline within AI focused on maximizing the performance and reliability of models by crafting prompts in a systematic and rigorous way.

Prompt injection

A method used to control or manipulate the model's output by giving it certain prompts. With this method, users and third parties attempt to get around restrictions and perform tasks that the model wasn't designed for.

Prompt resolution

The process of populating an LLM prompt at run time with additional information, such as values from structured data sources and knowledge retrieved from unstructured data sources. This process is sometimes referred to as dynamic grounding or hydrating a prompt. See [Prompt Template Run-time Execution](#).

Prompt template

A string with placeholders that are replaced with business data values to generate a final text instruction that is sent to the LLM.

R

Reasoning engine, Atlas reasoning engine

Guides how an agent launches topics and actions and generates responses during a conversation to accomplish a task for the user—in other words, how an agent reasons and takes action. You can think of the reasoning engine as a series of carefully orchestrated prompts sent to a large language model (LLM). Each step in the agent's iterative classification and reasoning represents one or more LLM calls.

See [How Agentforce Works](#).

Reference action

The Salesforce functionality that an agent action calls to get information or perform a task. For example, an agent action can call an API to retrieve data, a flow to update a record, a prompt template to generate a response, an Apex class to run custom business logic, or a predictive model to make a recommendation.

See [Create a Custom Agent Action](#) to learn what reference action types are supported.

Retrieval-augmented generation (RAG)

A form of grounding that uses an information retrieval system like a knowledge base to enrich a prompt with relevant context, for inference or training.

See [Ground Agentforce in Your Data](#).

Retriever

A logical layer between a search service and knowledge retrieval-powered solutions, such as [retrieval-augmented generation \(RAG\)](#) implementations. It defines the runtime search and retrieval configuration for an application, agent, prompt template, and other solution components. A retriever serves as a reusable, versioned, and packageable artifact that simplifies the setup of knowledge retrieval with search-based grounding for agents, data libraries, prompt templates, with Apex, or in Flow.

See [Retrieve Data](#).

S

Search index

A Data 360 search index holds a collection of [content chunks](#) and their respective [vector embeddings](#). The search index facilitates search for relevant vectors given a query vector. Depending on your data and query needs, you can create either a vector search index or a hybrid search index.

See [Use Search for AI, Automation, and Analytics](#).

Semantic retrieval

A scenario that allows an LLM to use similar and relevant historical business data that exists in a customer's CRM data.

Suggested actions (Lightning Experience only)

A set of three contextually relevant actions in the Agentforce conversation panel, based on the current page the user is viewing. These actions help users identify the most immediate step they can take to complete a task or learn more about a specific feature. Suggested actions consider page context only and are rules-based. The result of a suggested action is predefined, so it can differ from the result of entering a similar free text input in an agent conversation.

T

Temperature

A parameter that controls how predictable and varied a model's outputs are. A model with a high temperature generates random and diverse responses. A model with a low temperature generates focused and more consistent responses.

Token

To understand or generate text, a large language model (LLM) breaks the text into smaller units called tokens. A token can be as big as a single word or as small as a single character, depending on how the text is processed or generated.

Token size can affect agent billing and performance. In general, the greater the number of tokens in a prompt or response, the more complex the task and the slower the response of the LLM.

The maximum number of tokens that can be processed at a time is called a context window and varies by model. To learn more about context windows for supported models, see [Agentforce Developer Guide: Supported Models](#).

Toxicity

Describes many types of discourse, including but not limited to offensive, unreasonable, disrespectful, unpleasant, harmful, abusive, or hateful language.

Trusted AI

Guidelines created by Salesforce that are focused on the responsible development and implementation of AI.

U

Unstructured data

Data that doesn't have a specific, consistent format and can't be easily stored in a typical relational database. Common forms of unstructured data include chat transcripts, audio files, websites, legal documents, and other large texts, such as books.

See [Unstructured Data in Data 360](#).

Usage type

Usage types are the different categories that classify how credits are consumed when using Agentforce and other generative AI features. Each usage type has its own multiplier rate as listed in the rate card that determines how many credits are charged per unit of use. You can track your org's usage of Agentforce features and the credit consumption in Digital Wallet.

See [Generative AI Usage and Billing](#) and [About Digital Wallet](#).

User message, user utterance

Input from an end user to an agent, often a question or request. This can be free-text input entered into a chat UI or sent in an email, a selection from a predefined menu, or even voice input.

For agents that don't directly interact with an end user, sometimes the admin or builder provides a string that's treated as a user message in order to define the agent's task.

V

Variable

Stores contextual information about agent conversations. Variables can be used to personalize agent conversations, implement user verification, and ensure consistent agent behavior. Variables can be used in filters, instructions, and as input for actions.

Salesforce provides different types of variables. See [Agent Variables](#).

Vector embedding

A numerical representation of [unstructured data](#) that machines can read. Vector embeddings measure the semantic similarity of different pieces of text, enabling accurate and relevant search results for generative AI prompts.

See [Vector Search](#).

Agentforce Considerations

Carefully review the support, limits, and considerations for AI agents.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses](#)

vary by agent type.

! **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

Agents Support

- Agentforce is included as a Covered Service in the Einstein Platform and Agentforce SOC 2 and SOC 3 reports. Agentforce is HIPAA eligible and covered under the Salesforce [Business Associate Addendum Restrictions](#), and has also achieved ISO 27001, 27017, and 27018 certifications.
- The Agentforce panel is available in Lightning Experience, the Salesforce mobile app, the Field Service mobile app, and Sales Cloud Everywhere.
- The Agentforce platform supports OpenAI GPT-4o for reasoning engine calls. To use Anthropic on Amazon Bedrock as the model provider for Agentforce instead, see [Select Agentforce Model Option](#). Agent actions can make calls to other predefined LLMs. Bringing your own model isn't supported, but custom actions that execute prompt templates can use any Salesforce-managed model. See [Large Language Model Support](#).
- Agentforce supports [custom and standard User Interface API-supported objects](#). Object support for individual standard agent actions can vary. See the reference documentation for an action for more information.
- Currently, only Agentforce Service Agent can connect to enhanced Messaging channels and Bring Your Own Channel. See [Considerations for Agentforce Service Agent](#).
- Agents have limited API support. See [Agent API Developer Guide](#).
- Agents aren't available for Government Cloud.

Agents Languages

- Language support differs by agent type. For more details, see the [considerations for your agent type](#).
- Language settings apply to LLM-generated messages only.
 - Topic and action instructions, including input and output instructions, are supported in English only. If you provide them in a different language, the agent's reasoning engine may not perform as expected.
 - Language and tone settings don't affect the output of agent actions that have a specified language and tone, such as Draft or Revise Email. Some action inputs are available in English only.
 - System messages, such as the agent's welcome message, are translated into the end user's language only when the end user's language is selected as an additional language in the agent's language settings. To test system message translation, change the End User Language preview condition in the conversation preview panel.
- If the inputs or outputs of agent actions or associated prompt templates are in an unsupported language, those actions may not function properly.
- Language support for toxicity differs from the supported languages for Agentforce (Default). See

[Einstein Trust Layer Region and Language Support.](#)

- Some LLMs generate responses that are close variants but not exact matches for the requested locale. For example, if a user requests the French (Belgium) locale, which isn't supported, some LLMs generate a response in the French (France) locale.

Agents Limits

- For best performance, we recommend assigning no more than 10 actions to a topic, and 10 topics to an agent.
- You can have up to 100 agents and, within that 100, you can have one version of the default Agentforce agent. Einstein bots count towards the limit of agents.
- If your licenses limit the number of a specific agent type that you can create and you reach that limit, the agent type is disabled in the guided setup.
- Agent actions time out after 60 seconds.
- Reasoning engine requests time out after 30 seconds.
- Agent action outputs over 65,000 characters are truncated.

Considerations for Agent Conversations

- Agents stream LLM responses in conversations as the responses are received. Certain Einstein Trust Layer features are applied only to the final agent response. If a hallucination is detected after the response has started streaming, the response is deleted and a new response is generated.
- Agents are optimized for questions or requests that are related to a specific topic, rather than open-ended questions that are open to interpretation.
- Deactivating an agent interrupts any ongoing user conversations. Users aren't notified that an agent is deactivated. If the agent has system messages, it sends the system error message as a response to any user messages. If the agent is deployed to the Agentforce panel, the panel is available until the user closes it, and it can't be reopened until the agent is active.
- In general, agents support one intent per utterance, so users can't make requests that span multiple intents. Users can break more complex requests into individual messages. However, the Draft or Revise Email action can combine actions to address multiple user intents.
- Agent conversations aren't personalized based on past sessions. See Agents Limits.
- Agents support small talk, but topics and number of turns are limited to ensure trust and prioritize enterprise use cases. Great for CRM! Awkward at parties.

Considerations for Custom Assets

- When you create a custom action, you can't specify how the output appears in an agent conversation. The output is formatted automatically.
- Custom actions can't accept a list and object as input. A fix is on the way.
- Custom actions that reference a prompt template can use any Salesforce-managed model. See [Large Language Model Support](#).
- Custom actions that reference a custom prompt template support only these inputs and outputs:
 - Input: record information object type inputs (for example, the opportunity to summarize)



Note Object input types are currently only partially supported due to inconsistent behavior. A fix is on the way. In the meantime, we recommend using a flow to wrap a prompt template and creating a custom action from the flow. This scenario requires detailed action instructions, so test and iterate on your instructions carefully.

- Outputs: text type outputs (for example, a two-sentence summary of the opportunity)
- Testing or previewing custom Lightning types for Agentforce Service agent in Agentforce Builder is not supported. To test and preview custom Lightning types for Agentforce Service agent, navigate to the Embedded Service Deployments Settings page and click **Test Enhanced Web Chat**.
- Agent custom actions support only [custom and standard User Interface API-supported objects](#).
- Custom actions that reference an Apex class or flow support only [primitive data types](#). For example, if a flow includes a picklist, currency, or collection resource, you can't use that flow as a reference action for a custom action.
- Loading text for agent actions can be tested in preview conversations for active agents only.
- When you remove a custom topic or action from an agent, it's deleted and can't be restored.

See Also

[Standard Agent Action Reference](#)

Agentforce Builder Considerations

Carefully review the current considerations and limitations for the new Agentforce Builder. Keep an eye on our release notes for ongoing improvements as we work toward general availability.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

- You can only create Agentforce Service agents (from scratch) and Agentforce Employee agents (from a template). Salesforce plans to support creating agents of other types and from other templates.
- You can't modify agents that you created in the legacy Agentforce Builder in the new builder. As a workaround, create a similar agent in the new builder. Then, copy and paste important fields from the original agent, such as system messages, and add the same topics and actions. We recommend exploring the new builder's features, such as the logical expressions available with Agent Script. Do this before adding the topic instructions from your original agent.
- Agents created in both the new Agentforce Builder and the legacy builder are available in the Agents list in Agentforce Studio and in the Agentforce Agents Setup page list view. Clicking the agent name opens it in the builder in which it was created.
- Agents can only use the Messaging connection, Enhanced Chat v2 connection, and Service Email connection. Salesforce plans to support more connections.
- Agentforce Employee agents created in the new Agentforce Builder don't currently support conversation recommendations.
- Some features are only available in Script view. For details about these features and Agent Script, see

Agent Script

- The [after_reasoning block](#) is Agent Script-only and isn't supported in Canvas view.
- [Customizing an agent action's input or output with a custom Lightning type](#) isn't supported in Canvas view. As a workaround, [create a custom action from the asset library](#), edit the Input Rendering or Output Rendering parameter, and then [add the action to a topic in Agentforce Builder](#).
- You can't select a search provider for the [Search the Web agent action](#) in Canvas view. As a workaround, add an action input that stores the provider name.
- When Agent Script can't compile, the Canvas view underlines the code that produces the error in red. Switch to Script view for more details and to fix the error. It's possible to make invalid changes in the Script view that make the Canvas view unavailable. To switch back to the Canvas view, fix the errors in the Script view.
- Agent actions trigger billing when they run, whether they run deterministically (for example, in reasoning instructions) or during agent reasoning with an LLM. Utilities such as escalations to a representative, setting variables, or transitions to another topic, don't incur billing as agent actions.

Agents and Data Usage

As an Einstein customer, it's important for you to know what data is being used by agents.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

This table lists the data that's used by each standard agent action.

Action	Customer Data and Salesforce Objects Used
Agentforce IT Service Associate Related Records For Incident	Incident, Problem
Agentforce IT Service Associate Related Records for Problem	Incident, Problem
Agentforce IT Service Check Incident Attributes	Incident, ConfigurationItem, Incident
Agentforce IT Service Create Incident Resolution Summary	ActionPlan, ActionPlanItem, ChangeRequest, ChangeRequestCnfgItem, ChangeRequestRelatedIssue, ConfigurationItem, EntityMilestone, IncidentConfigurationItem, Knowledge, Problem, ProblemConfigurationItem, ProblemIncident, IncidentFeed, Task, LinkedArticle
Agentforce IT Service Create Incident Root Cause Summary	ActionPlan, ActionPlanItem, ChangeRequest, ChangeRequestCnfgItem, ConfigurationItem, EntityMilestone,

Action	Customer Data and Salesforce Objects Used
	IncidentConfigurationItem, Problem, ProblemConfigurationItem, IncidentFeed, Task, Knowledge
Agentforce IT Service Create Problem Resolution Summary	Problem, ActionPlan, ActionPlanItem, ChangeRequest, ChangeRequestCnfgItem, ChangeRequestRelatedIssue, ConfigurationItem, EntityMilestone, Incident, IncidentConfigurationItem, Knowledge, ProblemConfigurationItem, ProblemIncident, ProblemFeed, Task, LinkedArticle
Agentforce IT Service Create Problem Root Cause Summary	Problem, ConfigurationItem, Incident, IncidentConfigurationItem, ProblemConfigurationItem, ProblemIncident, ProblemFeed
Agentforce IT Service Employee Incident Creation	User Message Text, Incident
Agentforce IT Service Evaluate Problem Creation Requirement	Problem, ConfigurationItem, IncidentConfigurationItem, ProblemConfigurationItem, ProblemIncident
Agentforce IT Service Post Swarming Summary to Feed Item	IncidentFeed, ProblemFeed, Slack Channel Summary Text
Agentforce IT Service Propose Resolution Summary for Incident	Incident, ActionPlan, ActionPlanItem, ConfigurationItem, IncidentConfigurationItem, ProblemConfigurationItem, IncidentFeed, ProblemFeed, Problem, Knowledge
Agentforce IT Service Propose Resolution Summary for Problem	Problem, ActionPlan, ActionPlanItem, ConfigurationItem, IncidentConfigurationItem, ProblemConfigurationItem, ProblemFeed, IncidentFeed, Knowledge, Incident
Agentforce IT Service Summarize Change Request	ChangeRequest, ActionPlan, ActionPlanItem, ChangeRequestCnfgItem, ChangeRequestRelatedIssue, ConfigurationItem, EntityMilestone, Incident, IncidentConfigurationItem, Knowledge, Problem, ProblemConfigurationItem, Release, ReleaseRelatedRecord, ChangeRequestFeed, Task, LinkedArticle
Agentforce IT Service Summarize Incident	Incident, ActionPlan, ActionPlanItem, ChangeRequest, ChangeRequestCnfgItem, ChangeRequestRelatedIssue, ConfigurationItem, EntityMilestone, IncidentConfigurationItem, Knowledge, Problem, ProblemConfigurationItem, ProblemIncident, IncidentFeed, Task, LinkedArticle
Agentforce IT Service Summarize Incident for Employees	Incident, EntityMilestone, IncidentFeed
Agentforce IT Service Summarize	Incident, ConfigurationItem, IncidentConfigurationItem,

Action	Customer Data and Salesforce Objects Used
Multiple Incidents	IncidentFeed
Agentforce IT Service Summarize Problem	Problem, ActionPlan, ActionPlanItem, ChangeRequest, ChangeRequestCnfgItem, ChangeRequestRelatedIssue, ConfigurationItem, EntityMilestone, Incident, IncidentConfigurationItem, Knowledge, ProblemConfigurationItem, ProblemIncident, ProblemFeed, Task, LinkedArticle
Agentforce Platform Answer Questions with Salesforce Documentation	Salesforce Help Documentation
Agentforce Platform Answer Questions with Knowledge	Knowledge
Agentforce Platform Draft or Revise Email	Account, Contact, Lead, Opportunity, User, Call Summary, the output of another action
Agentforce Platform Extract Fields and Values from User Input	Any User Interface API-supported standard or custom objects. Specific data usage depends on the fields and values the user wants to extract from the input.
Agentforce Platform Get Policies by Object	Any searchable standard objects supported by the User Interface API and any searchable custom objects. Specific data usage depends on the records the user wants to find.
Agentforce Platform Get Policies by Policy Type	Any searchable standard objects supported by the User Interface API and any searchable custom objects. Specific data usage depends on the records the user wants to find.
Agentforce Platform Get Policy Details	Any searchable standard objects supported by the User Interface API and any searchable custom objects. Specific data usage depends on the metadata and record field values the user wants information about.
Agentforce Platform Get Record Details	Any searchable standard objects supported by the User Interface API and any searchable custom objects. Specific data usage depends on the record the user wants information about.
Agentforce Platform Identify Object by Name	Any searchable standard objects supported by the User Interface API and any searchable custom objects. Specific data usage depends on the records the user wants to find.
Agentforce Platform Identify Record by Name	Any User Interface API-supported standard or custom objects. Specific data usage depends on the metadata and record field values such as name and ID the user wants to extract from the

Action	Customer Data and Salesforce Objects Used
	input.
Agentforce Platform Query Records	Any searchable standard objects supported by the User Interface API and any searchable custom objects. Specific data usage depends on the records the user wants to find.
Agentforce Platform Query Records with Aggregate	Any searchable standard objects supported by the User Interface API and any searchable custom objects. Specific data usage depends on the records the user wants to find.
Agentforce Platform Send Email with Verification Code	Contact, User
Agentforce Platform Update Record	Any User Interface API-supported standard or custom objects. Specific data usage depends on the fields the user wants to update.
Agentforce Platform Verify Customer	NA
Asset Service Management Create Service Quote	Asset, Asset Warranty, Price Book, Product2, Work Type, Quote, Quote Line Item, Quote Line Work Source
Asset Service Management Create Service Work Order	Quote, Quote Line Item, Quote Line Work Source, Work Order, Work Order Line Item
Asset Service Management Get Asset Warranties	Asset, Asset Warranty
Asset Service Management Get Price Books	Product2, Price Book
Asset Service Management Get Products	Work Type, Product2
Asset Service Management Get Service Quote	Asset, Quote Line Work Source, Quote
Asset Service Management Summarize Asset Performance	Asset, Record Alert, Case, Work Order, Asset Warranty, Claim, Service Appointment
Asset Service Management Summarize Vehicle Performance	Vehicle, Vehicle Performance Summary, Vehicle Telematics Event, Vehicle Fault Code Mapping, Vehicle Trip, Vehicle Trip Driver Behavior, Record Alert, Case, Work Order, Claim Item, Claim Coverage, Asset, Asset Warranty, Product2, Product Related Material, Service Appointment, Vehicle Definition
Automotive Create Payment Deferral Case	Case, Service Catalog Request, Service Catalog Request Extended Attribute Value

Action	Customer Data and Salesforce Objects Used
Automotive Create Payment Due Date Modification Case	Case, Service Catalog Request, Service Catalog Request Extended Attribute Value
Automotive Get Automotive Financial Accounts for Service Processes	Account, Financial Account, Financial Account Party, Financial Account Party Financial Asset, Party Financial Asset, Asset, Vehicle
Automotive Get Financial Accounts for a Customer	Financial Account Party, Financial Account
Automotive Get Updated Terms for Payment Deferral	NA
Automotive Get Updated Terms for Payment Due Date Modification	NA
Automotive Get Vehicles for a Customer	Asset, Vehicle
Automotive Summarize Customer Account	Account, Asset, Vehicle, Account Contact Relation, Party Relationship Group, Engagement Interaction, Topic Assignment, Topic, Contact, Driver Performance Summary
Automotive Summarize Customer Finance Profile	Account, Financial Account, Financial Account Party, Applicant, Application Form, Case, Opportunity
Automotive Summarize Financial Account for Customer	Asset, Financial Account, Financial Account Balance, Financial Account Fee, Financial Account Party, Financial Account Party Financial Asset, Financial Account Statement, Financial Account Transaction, Party Financial Asset
Digital Lending Retrieve Loan Product Categories	Picklist Value Info and Product
Digital Lending Retrieve Products By Category	Product
Digital Lending Retrieve Product Details	Product, Term, Term Related Object, Product List Rate, and Product Fee
Digital Lending Retrieve Programs By Product	Product, Program, and Program Product
Digital Lending Analyze Estimated Loan Amount	NA
Digital Lending Retrieve Program Details	Program, Term, Term Related Object, Product List Rate, and Product Fee.
Agentforce Platform Summarize	Any User Interface API-supported standard or custom objects.

Action	Customer Data and Salesforce Objects Used
Record	Specific data usage depends on the record the user wants to summarize.
B2C Commerce Get B2C Product By ID	Product
B2C Commerce Get B2C Product Recommendations	Product
B2C Commerce Search for B2C Order	Order
Collections and Recovery Compile Script for Next Call Based on Previous Collections Interactions	Account, Contact, Financial Account, Collection Plan, Content Document Link, Note, Voice Call
Collections and Recovery Create Case and Related Case Proceeding Records	Account, Contact, Collection Plan, Case Proceeding, Case Proceeding Participant, Case, Event
Collections and Recovery Create Promise to Pay	Account, Contact, Collection Plan, Payment Schedule, Payment Schedule Item
Collections and Recovery Generate and Send Payment Link	Account, Contact, Financial Account, Collection Plan, Payment Link
Collections and Recovery Get Payment Method Sets for Merchant Account	Get Payment Method Sets for Merchant Account
Commerce Add Order to Cart	Cart, Products
Commerce Get Most Recent Orders	Order Summary
Commerce Get Shopper Effective Accounts in Commerce	Accounts, Effective Account
Commerce Look Up Order Summary for Commerce	Account, Order Summary, Order Summary Line Items
Communications Get Account Record	Account, Contact
Communications Get All Invoices	Account
Communications Get Invoice Charges	Account
Communications Get Invoice Details	Account

Action	Customer Data and Salesforce Objects Used
Communications Create Billing Dispute Case	Account, Case
Communications Get Account Balance	Account
Communications Get Payment History	Account
Communications Get Service Level Objective Insights For Asset	Salesforce Objects: Account, Asset Data Model Objects: Asset Service Level Objective, Network Usage
Communications Get Group Suggestions	Quote, Quote Line Item Recipient
Communications Get Quote Location Count	Quote, Quote Line Item Recipient
Communications Get Recipient Grouping Criteria	Quote, Quote Line Item Recipient
Communications Get Quote Location Fields	Quote, Quote Line Item Recipient
Communications Create Quote Recipient Groups	Quote, Quote Line Item Recipient, Quote Recipient Group, Quote Recipient Group Member
Communications Update Quote Recipient Group Name	Quote, Quote Recipient Group
Consumer Goods Cloud Get Retail Execution Account Performance Data	Account, Product2 Custom Objects: Order__c, Order_Item__c, Unit_of_Measure__c
Consumer Goods Cloud Get Retail Execution Customer Tasks By Account	Account Custom Objects: Account_Task__c User
Consumer Goods Cloud Get Retail Execution Orders By Account	Account Custom Objects: Order__c, Order_Item__c Product2, Order_Template__c, Order_Item_Template__c

Action	Customer Data and Salesforce Objects Used
Consumer Goods Cloud Get Retail Execution Orders By Visit	Visit Custom Objects: Order__c, Order_Item__cAccount, Product2, Order_Template__c, Order_Item_Template__c
Consumer Goods Cloud Get Retail Execution Visits By Account	Account, Visit Custom Objects: Visit_Job__c, Asset_Audit__cProduct2, Asset, POS__c, POS_Template__c
Education Cloud Create Academic Interest (Beta)	Account, Contact, User, Academic Term, Academic Interest
Education Cloud Create Admissions Application (Beta)	Academic Term, Action Plan Template, Individual Application, Individual Application Task, Learning Program, Preliminary Application Reference, Program Term Application Timeline
Education Cloud Create Campus Tour Registration (Beta)	Account, Campaign, Campaign Member, User
Education Cloud Create Course Offering Channel	Course Offering, Course Offering Participant
Education Cloud Create Inquiry (Beta)	Account, User, Case, Educational Information Request, Academic Interest
Education Cloud Get Academic Term Data (Beta)	Academic Term, Program Term Application Timeline
Education Cloud Get Course Syllabus Canvas Layout	Course Offering, Course Offering Participant, Learning Course
Education Cloud Get Learning Program Data (Beta)	Academic Term, Learning Program, Learning, Program Term Application Timeline
Education Cloud Get Program Term Application Timeline Data (Beta)	Academic Term, Learning Program, Learning, Program Term Application Timeline
Education Cloud Get Campus Tour Campaigns (Beta)	Campaign
Education Cloud Summarize Advising Case	Contact, Case, Interaction Summary, Assessment, Program, Pulse Check, Action Plan, Care Plan, Record Alert
Education Cloud Find Advising Cases	Contact, Case

Action	Customer Data and Salesforce Objects Used
Education Cloud Find Campus Resources	<p>Program, Learning Course, Action Plan Template, Care Plan Template, and Involvement Group.</p> <p>Customers can use a data model object to store resources that they want to recommend to students through advisors.</p>
Education Cloud Get Learning Courses (Beta)	Learning Course
Education Cloud Suggest Student Goals (Beta)	Academic Term, Involvement Group Member, Person Competency, Person Trait, Person Affinity, Assessment, Assessment Question Response, Contact Profile, Academic Term Enrollment, Learner Program, Learning Program Plan, OmniProcess
Education Cloud Create Goal (Beta)	Goal Assignment
Experience Builder Experience Draft Text for Experience Builder Site (Beta)	NA
Field Service Assign Appointment to Service Resource for Field Service	Scheduling Policy, Service Appointment, Service Resource
Field Service Cancel Appointment for Field Service	Contact, Service Appointment, Engagement Topic
Field Service Create Appointment for Field Service	Contact, Service Appointment, Work Type, Work Order
Field Service Create Appointment List Filter for Field Service	CreateFilterEvent__e (platform event), Service Appointment
Field Service Get Appointment Information for Field Service	Contact, Service Appointment
Field Service Get Appointment Time Slots for Field Service	Contact, Service Appointment, Operating Hours, Scheduling Policy
Field Service Get Appointments By Criteria for Field Service	Flow Definition, User, Service Appointment, Service Resource, Assigned Resource, Contact, Account, Operating Hours, Service Territory Member, Service Territory, Work Type
Field Service Get Appointments to Fill Gaps for Field Service	Scheduling Policy, Service Appointment, Service Resource
Field Service Get Current Time for Field Service	Service Appointment, Service Territory, Operating Hours

Action	Customer Data and Salesforce Objects Used
Field Service Get Engagement Topics for Field Service	Messaging Session, Engagement Topic
Field Service Get Work Types for Field Service	Work Type
Field Service Rebook and Notify for Field Service	Flow Definition, Service Appointment
Field Service Refine Post-Work Summary for Field Service	Work Order
Field Service Schedule Appointment for Field Service	Contact, Service Appointment, Scheduling Policy, Engagement Topic
Field Service Summarize Scheduling Issues for Field Service	CreateFilterEvent__e (platform event), Dashboard, Report, Service Appointment
Field Service Summarize Service Appointment Notes	Service Appointment
Field Service Update Appointment Times for Field Service	Contact, Service Appointment
Financial Services Create Case to Block Card	Account, Case, Financial Account, Issued Card
Financial Services Create Case for Fee Reversal	Account, Case, Financial Account, Financial Account Fee
Financial Services Create Case for Financial Account Address Update	Account, Case
Financial Services Create Case For Manage Card Settings	Account, Case, Financial Account, Issued Card
Financial Services Create Case for Order Checkbook	Account, Case, Financial Account
Financial Services Create Case for Stop Check Payment	Account, Case, Financial Account
Financial Services Create Case For Transfer Funds	Account, Case, Financial Account
Financial Services Create Case For Travel Notification	Account, Case
Financial Services Create Interaction	Account, Account Plan Objective, Interaction

Action	Customer Data and Salesforce Objects Used
Financial Services Create Interaction Summary	Account, Account Plan Objective, Interaction, Interaction Summary
Financial Services Create Interaction Attendee	Contact, Interaction, Interaction Attendee, User
Financial Services Create Account Plan Objective	Account Plan, Account Plan Objective, Contact
Financial Services Create Account Plan Objective Measure	Account Plan Objective, Account Plan Objective Measure
Financial Services Create Action Plan	Action Plan, Action Plan Template, Account
Financial Services Create Action Plan Item	Action Plan, Action Plan Template, Action Plan Item, Account, Task
Financial Services Create Financial Goal	Financial Goal, Financial Goal Party, Account
Financial Services Create Financial Plan	Action Plan, Action Plan Template, Account
Financial Services Create Interest Tag	Interest Tag, Interest Tag Record Assingment, Tag Category Assignment, Tag Category, Topic, Topic Assignment, Account
Financial Services Create or Update Agenda Draft	Note, Account
Financial Services Create Person Life Event	Account, Person Life Event
Financial Services Create Record Alerts	Record Alert, Account
Financial Services Create Opportunity	Account, Opportunity
Financial Services Extract Action Plans	Action Plan
Financial Services Extract Financial Goals	Financial Goal
Financial Services Extract Financial Plans	Financial Plan
Financial Services Extract Person Life Events	Person Life Event

Action	Customer Data and Salesforce Objects Used
Financial Services FinServ Package Create Financial Goal	Financial Goal, Account
Financial Services FinServ Package Create Life Event	Account, Life Event
Financial Services FinServ Package Extract Financial Goals	Financial Goal
Financial Services FinServ Package Extract Life Events	Life Event
Financial Services FinServ Package Get Client Life Events	Life Event, Account, Account Contact Relation
Financial Services FinServ Package Structure Financial Advisor Meeting Notes	NA
Financial Services FinServ Package Summarize Financial Details	Financial Account, Financial Account Role, Financial Holding, Financial Goal, Account, Account Contact Relation
Financial Services FinServ Package Summarize Financial Goals	Financial Goal, Account, Account Contact Relation
Financial Services FinServ Package Summarize Portfolio Performance	Financial Account, Financial Account Role, Financial Holding, Account, Account Contact Relation
Financial Services Get Card Details for Account	Account, Issued Card
Financial Services Get Card Settings	Financial Account, Issued Card
Financial Services Get Client Life Events	Person Life Event, Account, Party Relationship Group, Account Contact Relation
Financial Services Get Fee Transactions from Financial Account	Financial Account, Financial Account Transaction
Financial Services Get Financial Account Addresses	Account, Financial Account, Financial Account Address
Financial Services Get Financial Account Balances	Financial Account, Financial Account Balance
Financial Services Get Financial Accounts for an Account	Account, Financial Account
Financial Services Get Financial Account Transactions	Financial Account, Financial Account Transaction

Action	Customer Data and Salesforce Objects Used
Financial Services Get Interactions By Date Range	Account, Interaction
Financial Services Restructure Meeting Notes	Account, Interaction
Financial Services Review Asset Allocation	Financial Asset Portfolio Target Allocation, Account, Party Relationship Group, Account Contact Relation
Financial Services Structure Financial Advisor Meeting Note	NA
Financial Services Summarize Account Financial Details	Financial Account, Financial Account Party, Case, Securities Holding, Financial Goal, Financial Goal Party, Financial Plan, Account, Party Relationship Group, Account Contact Relation
Financial Services Summarize Account Record Alerts	Record Alert, Account
Financial Services Summarize Agenda Drafts	Account, Note
Financial Services Summarize Household Financial Details	Financial Account, Financial Account Party, Case, Securities Holding, Financial Goal, Financial Goal Party, Financial Plan, Account, Party Relationship Group, Account Contact Relation
Financial Services Summarize Financial Plans and Goals	Financial Goal, Financial Goal Party, Financial Plan, Account, Party Relationship Group, Account Contact Relation
Financial Services Summarize Portfolio Performance	Financial Account, Financial Account Party, Securities Holding, Account, Party Relationship Group, Account Contact Relation
Fundraising Create Philanthropic Assessment	Account, Party Philanthropic Assessment
Fundraising Create Party Philanthropic Research Profile	Account, Party Philanthropic Research Profile
Fundraising Get Research Profile Canvas Layout	Party Philanthropic Research Profile, Party Philanthropic Assessment, Party Philanthropic Indicator, Party Philanthropic Occurrence
Fundraising Summarize Philanthropic Milestones	Account, Party Philanthropic Milestone, Party Philanthropic Assessment, Party Philanthropic Occurrence, Party Philanthropic Indicator
Fundraising Summarize Wealth Capacity	Account, Party Philanthropic Milestone, Party Philanthropic Assessment, Party Philanthropic Occurrence, Party Philanthropic Indicator

Action	Customer Data and Salesforce Objects Used
Fundraising Close Gift Commitment	Account, Gift Commitment, Gift Commitment Schedule, Gift Transaction, Contact Profile, Gift Transaction Designation, Gift Tribute, Fundraising Config
Fundraising Manage Gift Commitment	Account, Campaign, Opportunity, Gift Commitment, Gift Commitment Schedule, Gift Transaction, Gift Transaction Designation, Gift Soft Credit, Gift Default Designation, Gift Default Soft Credit, Gift Designation, Gift Commitment Change Attribution Log, Payment Instrument, Outreach Source Code, Fundraising Config, Contact Profile
Health Classify Disease Surveillance Case	Case, Specimen, Diagnostic Summary, Care Observation, Health Condition, Disease Definition, Disease Definition Criteria, Disease Definition Condition
Health Extract Patient Home Visit Requirements	Voice Call
Health Find Matching Providers	CareProviderSearchableField
Health Find Providers Info	Account, CareProviderSearchableField, CareSpecialty, Contact, HealthcarePayerNetwork, HealthcareProvider, OperatingHours
Health Generate FHIR Payload	NA
Health Get Patient Data from EMR	NA
Health Register a Patient in EMR	NA
Health Summarize Patient Healthcare Details	Clinical Encounter, Medication Request, Health Condition, Allergy Intolerance, Patient Immunization, Goal Assignment, Care Gap, Care Plan, Patient Medical Procedure, Care Observation, Opportunities, Clinical Service Request, Member Plans
Health Summarize Patient Home Healthcare Details	Clinical Encounter, Medication Request, Health Condition, Allergy Intolerance, Patient Immunization, Goal Assignment, Care Gap, Care Plan, Patient Medical Procedure, Care Observation, Opportunities, Clinical Service Request, Member Plans
Insurance Get Insurance Quote Details	Account, Quote, Quote Line Item
Inventory Management Get Search Criteria and Results	NA
Insurance Summarize Insurance Policyholder	Account, Insurance Policy, Insurance Policy Asset, Insurance Policy Participant, Insurance Policy Coverage, Claim

Action	Customer Data and Salesforce Objects Used
Inventory Management Get Search Criteria and Results	NA
Life Sciences Add Site and Investigator to Study	Healthcare Facility, Healthcare Provider, Care Program Site, Research Study
Life Sciences Add Sites Search Results to Study	Healthcare Facility, Healthcare Provider, Care Program Site, Research Study, Care Site Investigator Searchable Fields
Life Sciences Generate Healthcare Provider Summary	Accounts, Provider Account Territory Summary, Healthcare Provider, Account User Territory2 View, Visit, Provider Affiliations, Provider Visits, Inquiries, Inquiry Questions, Provider Visit Product Detailing, Provider Visit Requested Sample, Provider Visit Detailing Product Message, Party Publications, Accreditations, Provider Activity Goals
Life Sciences Get Omniscript IDs From Research Study	CareProgram, CareProgramDetail, ResearchStudy, OmniProcess
Life Sciences Get Site Search Filters for Research study	Care Program, Research Study, Care Program Detail
Life Sciences Go to Care Program Sites	CareProgramSite, ResearchStudy
Life Sciences Send Site Feasibility Assessments	Assessment Envelope, Assessment Envelope Item, Care Program Site, Account(personal), Contact Point Email, OmniProcess
Life Sciences Summarize Investigator	HealthcareProvider, PersonEmployment, HealthcareProviderSpecialty, HealthcarePractitionerFacility, PersonEducation, BusinessLicense, BoardCertification, PartyPublication, Account, ProviderAffiliation, ResearchStudy
Life Sciences Summarize Patient Response for Benefits Reverification	Assessment, Assessment Envelope, Assessment Envelope Item, Assessment Question Response, Care Benefit Verify Request, Medication, Medication Request, Account, Healthcare Provider, Product2, Unit Of Measure, Member Plan, Purchaser Plan
Loyalty Management Add or Update Limit in Pricing Promotion	Promotion
Loyalty Management Create or Update Pricing Promotion	Promotion, PromotionMarketSegment, Campaign, MarketSegment
Loyalty Management Create or Update Promotion using Accrual Promotion Template	Promotion, LoyaltyProgram, LoyaltyTierGroup, LoyaltyTier, LoyaltyProgramCurrency, LoyaltyProgramBadge, VoucherDefinition, LoyaltyPartnerProduct,

Action	Customer Data and Salesforce Objects Used
	PromotionMarketSegment, JournalSubtype
Loyalty Management Create or Update Promotion Using a Spend X Template	Promotion, PromotionProduct, PromotionProductCategory, VoucherDefinition, GameDefinition
Loyalty Management Generate Loyalty Promotion Email	Promotion, LoyaltyProgram, LoyaltyTierGroup, LoyaltyTier, LoyaltyProgramCurrency, LoyaltyProgramBadge, VoucherDefinition, LoyaltyPartnerProduct, PromotionMarketSegment, JournalSubtype
Life Sciences Summarize Site	Healthcare Facility, CareProviderFacilitySpecialty, HealthcareProviderService, Accreditation, HealthcarePractitionerFacility, Account, ProviderAffiliation, ResearchStudy
Manufacturing Create Product Request	Product Request, Product Request Line Item, Product Item, Location
Manufacturing Create Sales Agreements Bulk Update Request	Sales Agreement, Sales Agreement Product, Sales Agreement Product Schedule, Sales Agree Product Attribute, Account, Pricebook Entry, Product2, Attribute Definition, Attribute Picklist Value
Manufacturing Create Service Quote	Asset, Asset Warranty, Price Book, Product2, Work Type, Quote, Quote Line Item, Quote Line Work Source
Manufacturing Create Service Work Order	Quote, Quote Line Item, Quote Line Work Source, Work Order, Work Order Line Item
Manufacturing Create Visit	Visit, Account, Contact, Location, Address, Work Type
Manufacturing Forecasts to Opportunity Execution	Advanced Account Forecast Set Use, Advanced Account Forecast Fact, Opportunity, Opportunity Line Item
Manufacturing Forecasts to Opportunities Filter Criteria	Manufacturing Program, Forecast, Opportunity, Opportunity Line Item, Account, Pricebook2
Manufacturing Get Asset Warranties	Asset, Asset Warranty
Manufacturing Get Price Books	Product2, Price Book
Manufacturing Get Products	Work Type, Product2
Manufacturing Get Service Quote	Asset, Quote Line Work Source, Quote
Manufacturing Summarize Asset Performance	Asset, Asset Telematics Event, Asset Fault Code Mapping, Asset Performance Summary, Record Alert, Case, Work Order, Claim Item, Claim Coverage, Asset Warranty, Product2

Action	Customer Data and Salesforce Objects Used
Manufacturing Get Attribute Details	Attribute Definition, Attribute PicklistValue
Manufacturing Get Search Criteria and Results	Search Criteria Configuration, Search Metadata
Manufacturing Opportunity to Json Builder	Opportunity, Opportunity Line Item Schedule
Manufacturing Perform Bulk Update for Sales Agreement Metrics	Sales Agreement, Sales Agreement Product, Sales Agreement Product Schedule
Manufacturing Summarize Inventory Details	Product Item, Location
Manufacturing Summarize Rebate Payouts for a Member	Rebate Program Member, Account, Rebate Program, Rebate Type, Rebate Program Member Payout, Program Rebate Type Payout
Manufacturing Get Rebate Type Payout Sources	Program Rebate Type Payout Source, Rebate Member Product Aggregate
Manufacturing Get Aggregate Summary	Rebate Program Member, Rebate Program Payout Period, Rebate Program Member Payout, Rebate Type
Manufacturing Get Payout Periods For a Member	Rebate Program Member, Rebate Program Payout Period
Manufacturing Get Aggregate Sources For a Member	Rebate Member Product Aggregate, Transaction Journal
Manufacturing Get Rebate Type Payouts For a Member	Program Rebate Type Payout, Rebate Program Payout Period
Manufacturing Search Product And Parts	Product2 (Product records), Product Searchable Field
Manufacturing Search Dealers for Products	Dealer Product Searchable Field, Seller Product, Service Territory
Manufacturing Create Opportunity with Products and Preferred Seller	Account, Product2, Opportunity, Opportunity Product, Opportunity Preferred Seller, Price Book
Manufacturing Create Quote from Opportunity	Opportunity, Opportunity Product, Quote, Quote Line Item
Manufacturing Get Assets for Customer and Create Asset Appraisal	Asset, Opportunity, Appraisal, Appraisal Item
Manufacturing Get Pricebooks From WorkType	Work Type, Product2, Price Book

Action	Customer Data and Salesforce Objects Used
Manufacturing Get Product Price Details	Price Book, Price Book Entry, Product2
Manufacturing Get Products with Coverage	Asset, Product2, Asset Warranty, Service Contract, Entitlement
Manufacturing Summarize Asset Performance	Asset, Telemetry data, Service data, Fault codes
Manufacturing Summarize Rebate Type Payout Source	Rebate Program Member, Rebate Program Payout Period, Program Rebate Type Payout Source , Program Rebate Type Payout, Rebate Program Member Payout, Program Rebate Type Benefit, Rebate Member Product Aggregate, Transaction Journal, Rebate Type
Manufacturing Summarize Rebate Payouts by Period	Account, Program Rebate Type Payout, Rebate Program Member, Rebate Program Payout Period, Rebate Type
Manufacturing Summarize Sales Agreement Performance	Attribute Definition, Attribute PicklistValue
Marketing Draft a Campaign Brief	Campaign brief
Marketing Refine Campaign Preview	Campaign brief
Marketing Save Campaign Brief	Campaign brief
Marketing Create a Campaign From a Brief	Campaigns
Marketing Save Campaign	Campaigns
Marketing Draft Content	NA
Marketing Create Section with Content	NA
Marketing Summarize a Campaign	Campaigns
Marketing Generate Campaign Insights	Campaigns, Engagement Data from Data 360
Marketing Identify Business Unit	Business Units
Marketing Get Score for Record ID	Account, Contact, Lead, and Prospect
Marketing Journey Decisioning Create Content	Journeys from Marketing Cloud Engagement, and Flows
Marketing Journey Decisioning Selection	Journeys from Marketing Cloud Engagement, and Flows

Action	Customer Data and Salesforce Objects Used
Marketing Intelligence: Get Channel Types	User engagement data from DMOs
Marketing Intelligence: Get Campaign Objectives	User engagement data from DMOs
Marketing Intelligence: Get Metrics	User engagement data from DMOs
Marketing Intelligence: Get Low Performing Ads	User engagement data from DMOs
Media Create Media Opportunity (Beta)	Account, Opportunity, and Ad Opportunity
Media Create Media Proposal (Beta)	Price Book, Sales Transaction Type, Opportunity, Quote, Ad Quote, and Product
Media Find Media Opportunity (Beta)	Account, Opportunity, and Ad Opportunity
Media Get Media Products (Beta)	Price Book, Product, Ad Target Segment Value, Ad Target Category, Ad Target Category Segment, and Category
Media Get Media Products Based on Targeting (Beta)	Price Book, Product, Ad Target Segment Value, Ad Target Category, Ad Target Category Segment, and Category
Media Media Opportunity Summary (Beta)	Opportunity, Ad Opportunity, Quote, Ad Quote, and Task
Net Zero Cloud Combine Snippets	Document Clause
Net Zero Cloud Draft Disclosure Responses	Searchable Reference Document, Document Clause, Content Document, and Content Version
Net Zero Cloud Draft Snippet For Question	Searchable Reference Document, Document Clause, Content Document, Content Version, Assessment Question, Assessment Question Version, Document Clause Set, Document Clause Set Assessment Question
Net Zero Cloud Get Vehicle Asset Emission Source Data	Vehicle Asset Emission Source
Net Zero Cloud Get Sustainability Stakeholder Data	Sustainability Stakeholder
Net Zero Cloud Manage Sustainability Task Group	Sustainability Task Group
Net Zero Cloud Get Sustainability Task Group Data	Sustainability Task Group

Action	Customer Data and Salesforce Objects Used
Net Zero Cloud Create Sustainability Task Group	Sustainability Task Group, Sustainability Task, and Task
Personalization Get Context	Data graphs and all related objects
Personalization Get Recommendations	User engagement data from the DMOs
Personalization Understand User Intent	NA
Program Based Business Forecasts to Opportunities Filter Criteria	NA
Program Based Business Forecast to Opportunity Execution	Opportunity, Opportunity Line Item, Manufacturing Program, Forecast, Account, Pricebook2
Program Based Business OpportunityJsonBuilder	Opportunity, Account, Pricebook2
Program and Case Management Create Referral	Referral
Program and Case Management Get Participant Goal	Account, Contact, Goal Assignment
Program and Case Management Create Participant Benefits	Account, Contact, Benefit, Benefit Assignment, Benefit Disbursement, Program Enrollment
Program and Case Management Prepare Participant Notes	Account, Contact, Interactions, Interaction Summaries
Public Sector Automatically Resolve Complaint	Public Complaint
Public Sector Check For Regulatory Code Violation	Policy documents
Public Sector Create Assessment for Public Complaint	Assessment, Public Complaint
Public Sector Create Assessment Question Response	Assessment, Assessment Question, Assessment Question Response
Public Sector Create Candidate Leads	Account, Application Form, Lead, Party Profile, Recruitment Posting

Action	Customer Data and Salesforce Objects Used
Public Sector Create Regulatory Code Violation	NA
Public Sector Create Regulatory Code Violation for Public Complaint	Public Complaint, Regulatory Code, Regulatory Code Violation
Public Sector Create Regulatory Transaction Fee	Regulatory Code Violation, Violation Enforcement Action, Visit
Public Sector Create Violation Enforcement Action	Regulatory Code Violation, Visit
Public Sector Draft Visit Summary Email	Regulatory Transaction Fee, Regulatory Transaction Fee Item, Regulatory Code Violation, Violation Enforcement Action, Visit, Visited Party
Public Sector Email Candidate Leads	Lead, Recruitment Posting
Public Sector Email Complaint Participant	Account, Complaint Participant, Contact, Email Template, Public Complaint
Public Sector Find Similar Complaints	Public Complaint
Public Sector Find Similar Complaints Against Perpetrator	Complaint Participant, Public Complaint
Public Sector Find Similar Unresolved Complaints	Public Complaint
Public Sector Get Assessment Questions	Assessment Question, Assessment Question Assignment, Assessment Question Set, Public Complaint
Public Sector Get Assessment Question Text and Response Values	Assessment Question, Assessment Question Version
Public Sector Get Candidates and Create Leads	Account, Lead, Party Profile, Person Examination, Recruitment Posting
Public Sector Get Candidates with	Account, Person Competency, Person Examination

Action	Customer Data and Salesforce Objects Used
Matched Skills	
Public Sector Get Examination and Competency Details for Skills	Competency, Examination
Public Sector Get Regulatory Code Violation Details	Regulatory Code, Visit
Public Sector Get Relevant Application Forms	Application Form, Application Form Relation, Recruitment Posting, Recruitment Requisition
Public Sector Get Relevant Regulatory Codes	Public Complaint, Regulatory Code
Public Sector Get Relevant Skill IDs	Competency, Examination, Job Position Recruitment, Position Qualification, Requisition Job Position, Recruitment Posting
Public Sector Get Unprocessed Regulatory Codes	Public Complaint, Regulatory Code, Regulatory Code Violations
Public Sector Get Violation Enforcement Actions	Policy documents
Public Sector Preview Hiring Managers	Application Form, Recruitment Requisition, Recruitment Posting, Recruitment Requisition Participant
Public Sector Send Visit Summary Email	Visit, Visited Party
Public Sector Share Application Form with Hiring Manager	Application Form, Recruitment Requisition, Recruitment Posting, Recruitment Requisition Participant
Public Sector Summarize Application Form	Account, Action Plan, Action Plan Item, Application Form, Application Form Evaluation, Assessment, Assessment Question Responses, Board Certification, Omni Assessment Task, Party Profile, Person Education, Person Competency, Person Employment, Person Examination, Vetting Evaluation
Public Sector Summarize Public Complaint	Activity, Contact, Public Complaint, and documents uploaded when the complaint was filed
Revenue Add Quote Line Item to Quote	Opportunity, Price Book, Product, Product Selling Model, Quote, Quote Line Item

Action	Customer Data and Salesforce Objects Used
Revenue Apply Discount To Quote Line Item	Quote, Quote Line Item
Revenue Create Amendment Quote	Account, Asset, Contract, Quote, Quote Line Item
Revenue Create Initial Quote	Opportunity, Price Book, Quote
Revenue Create Renewal Quote	Asset, Quote, Quote Line Item
Revenue Explain Invoice Line	Invoice Line, Billing Schedule Group, Billing Period Item, Usage Billing Period Item, Billing Milestone Plan Item
Revenue Find Products	Product2, Pricebook2, PricebookEntry, ProductCategory, ProductCategoryProduct
Revenue Generate Product Description	Product, Product Category Product, Product Classification Attribute
Revenue Get Account Assets	Account, Asset, Asset Action, Asset Action Source
Revenue Get Account Balance	Account, Invoices, Credit Memo, Debit Memo, Payments, Refunds
Revenue Get Invoice Line Records	Invoice, Invoice Line
Revenue Get Latest Invoice and Document PDF	Account, Invoice, InvoiceDocument
Revenue Get Next Due Payment	Account, Invoice
Revenue Get Payment Plan Details	Invoice, Payemnt Schedule, Payment Schedule Item
Revenue Get Product Details	Product2, ProductSellingModel, Pricebook2, PricebookEntry, ProductAttribute, ProductAttributeCategory, ProductCategoryProduct, ProductComponentGroup, ProductRelatedComponent, ProductSellingModelOption, ProductQuantity, ProductSpecificationType, ProductSpecificationRecordType, ProductClassification
Revenue Get Product Selling Model for Products	Product, Product Selling Model, Product Selling Model Option
Revenue Get Rule-Based Product Recommendations	Quote, QuoteLineItem, Product2, ProductRelationshipType, ProductAttribute, ProductAttributeCategory, ProductCategoryProduct, ProductSellingModel, ProductClassification
Revenue Get Usage Details	Transaction Usage Entitlement, Usage Entitlement Account, Usage Entitlement Bucket, Usage Entitlement Entity, Usage Resource

Action	Customer Data and Salesforce Objects Used
Revenue Summarize Contract Document	Contract, Contract Document Version, Content Document
Revenue Update Quote Details	Quote
Revenue Update Quote Line Item Details	Quote, Quote Line Item
Revenue Query Contract Document	Contract, Contract Document Version, Content Document
Revenue Query Quote Line Items	Product, Quote, Quote Line Item
Sales Add Record to Cadence	Lead, Contact, Account, ActionCadence, ActionCadenceTracker, and ActionCadenceStepTracker
Sales Create a Label	Task, Flow Orchestration, Work Item, Contact, Account, Opportunity, Lead, Case, Campaign, Email Template, Action Cadence, Call Template, and Custom Object
Sales Create a To-Do	Account, Contact, and Lead
Sales Create Close Plan	<ul style="list-style-type: none"> • Opportunity: data, contact data, products, email, and email insights. • Activity 360: emails, meetings, and insights data.
Sales Explore Conversation	Video Call, Voice Call
Sales Find Contact Interactions	Contact, Opportunity, and Opportunity Contact Role
Sales Find Past Collaborators	Contact and User
Sales Find Similar Opportunities	Any searchable standard objects supported by the User Interface API and any searchable custom objects. Specific data usage depends on the records the user wants to find.
Sales Get Activity Details	Call, Email, Event, Task
Sales Get Activities Timeline	Call, Email, Event, Task
Sales Get Forecast Guidance	Forecasting Item, Forecasting Quota, Opportunity, Tasks, Default Period
Sales Get Product Pricing	Opportunity, PriceBook, and Product
Sales Identify Contact Role	Contact, Account, Opportunity, and Opportunity Contact Role
Sales Identify Key Contacts	Contact, Account, Opportunity, and Opportunity Contact Role
Sales Label a Record	Task, Flow Orchestration, Work Item, Contact, Account, Opportunity, Lead, Case, Campaign, Email Template, Action

Action	Customer Data and Salesforce Objects Used
	Cadence, Call Template, and Custom Object
Sales Log a Call	Contact, Lead, and Task
Sales Prioritize Opportunities	Opportunity
Sales Review My Day	User, Opportunity, Lead, Event, Task, and ForecastingQuota
Sales Suggest Next Step for Opportunity	Opportunity, Video Call, Voice Call, Notes, Email Message
Sales Suggest Stage for Opportunity	Opportunity, Video Call, Voice Call, Notes, Email Message
Sales Coach Give Feedback on Needs Analysis Stage	Opportunity
Sales Coach Give Feedback on Negotiation and Review Stage	Opportunity
Sales Coach Give Feedback on Proposal Stage	Opportunity
Sales Coach Give Feedback on Qualification Stage	Opportunity
Sales SDR Draft Generic Reply Email	Lead, Email Message
Sales SDR Draft Initial Outreach Email	Lead
Sales SDR Draft Nudge Email	Lead
Sales SDR Send Meeting Request	Lead, Contact, Email Message
Sales SDR Draft Meeting Request Email	Lead, Contact, Email Message
Sales SDR Schedule Email	Lead, Contact, Email Message, Action Cadence Step Tracker
Sales SDR Opt-Out Lead	Lead, Contact, Action Cadence Step Tracker
Sales Agreement Create Visit	NA
Sales Agreement Get Attribute Details	Attribute Definition, Attribute PicklistValue
Sales Agreement Perform Bulk Update for Sales Agreement Metrics	Sales Agreement, Sales Agreement Product, Sales Agreement Product Schedule
Sales Agreement Summarize Sales Agreement Performance	Attribute Definition, Attribute PicklistValue

Action	Customer Data and Salesforce Objects Used
Security Classify Security Risk	Security Center and Event Monitoring data and related objects
Security Get Security Alerts	Security Center and Event Monitoring data and related objects
Security Get Security Metric Data	Security Center and Event Monitoring data and related objects
Service Add a Case Comment	Case and CaseComment
Service Cancel Order	NA
Service Check Rep Availability for Routing	UserPresenceStatus, Group, GroupMember, Skill, ServiceResourceSkill, MessagingSession
Service Create Case	Case
Service Draft Case Response	Any searchable standard objects supported by the User Interface API and any searchable custom objects. Specific data usage depends on the record the user wants information about.
Service Enhance Product Description	Product
Service Finalize New Delivery Time	NA
Service Finalize Reservation	NA
Service Find Similar Interactions	Any searchable standard objects supported by the User Interface API and any searchable custom objects. Specific data usage depends on the record the user wants information about.
Service Get All Cases for Contact	Case
Service Get Case by Case Number	Case
Service Get Delivery Time Slots	NA
Service Get Order by Order Number	NA
Service Get Orders by Contact	NA
Service Get Reservation Time Slots	NA
Service Identify Customer by Email	Contact
Service Raise Flag for Supervisor	AgentWork, User
Service Reset Password	NA
Service Summarize Engagement	Any User Interface API-supported standard or custom objects. Specific data usage depends on the fields and values the user

Action	Customer Data and Salesforce Objects Used
	wants to extract from the input.
Service Summarize Product Reviews	Product
Service Update Customer Contact	NA
Service Update Omni-Channel User Configuration	Group (for queue assignments), GroupMember (for queue assignments), OmniSupervisorConfig, OmniSupervisorConfigGroup, OmniSupervisorConfigProfile, OmniSupervisorConfigQueue, OmniSupervisorConfigSkill, OmniSupervisorConfigUser, ServiceResourceSkill (for skill assignments), Skill (for skill assignments), ServiceResource, UserPresenceStatus
Setup with Agentforce (Beta)	User, any searchable standard objects supported by the User Interface API, any searchable custom objects, Setup metadata, and the DMOs listed in this topic . Specific data usage depends on the records the user wants to find.
Setup: Agent for Setup Create External Client App	External Client App
Setup: Agent for Setup Get and Explain Object Permissions of User	User and any searchable standard objects supported by the User Interface API and any searchable custom objects. Specific data usage depends on the records the user wants to find.
Setup: Agent for Setup Get and Explain User Permissions of User	User and any searchable standard objects supported by the User Interface API and any searchable custom objects. Specific data usage depends on the records the user wants to find.
Setup: Agent for Setup Identify User Permissions by Name	NA
Setup: Agent for Setup Migrate Connected App	Connected App, Connected App OAuth Settings, Connected App OAuth Policies
Setup: Agent for Setup Summarize OAuth in a Connected App	Connected App, Connected App OAuth Settings, Connected App OAuth Policies
Slack Archive a Slack Channel	Slack Channel ID
Slack Create a Salesforce Channel in Slack	Slack Channel ID, Salesforce Record ID
Slack Create a Slack Canvas	NA
Slack Create a Slack Channel	NA
Slack Create an Account Executive Brief	Account Name, Account Description, Account Opportunities, Record Snapshot

Action	Customer Data and Salesforce Objects Used
Slack List Slack Workspaces	Slack Workspace List
Slack Look Up a Salesforce Channel in Slack	Salesforce Channel, Salesforce Record ID
Slack Look Up a Slack User	Slack User ID
Slack Search Slack	Slack Message, File details (based on user permission)
Slack Send a Slack Direct Message	Slack User ID
Slack Send a Slack Message to a Channel	Slack Channel ID
Slack Share a Slack Canvas	Slack User ID or Slack Channel ID
Slack Summarize a Channel	Slack Message, File details (based on user permission) for a particular channel
Slack Start a Conversation with an Agent in Slack	Slack User ID
Slack Update a Slack Canvas	Slack Canvas
Volunteer Management Find Unfilled Shifts	Job Position Shifts
Volunteer Management Match Volunteers to Shifts	Account, Competency, Job Position Qualification, Location, Operating Hours, Person Competency, Person Location Availability, Position, Position Qualification, Time Slot, Volunteer Initiative, Job Position, Job Position Shift, Job Position Assignment
Omnistudio Diagnose Components (Pilot)	N/A
Omnistudio Get Org Objects	N/A

See Also

[Einstein and Data Usage](#)

[User Interface API Developer Guide: All Supported Objects](#)

Agent Types and Considerations

Learn about agent types and default templates for specific clouds and common use cases.

Agent Type	What it Does	Required Editions	Required Permissions
Agentforce (Default)	<p>Helps your employees accomplish key business tasks in Salesforce.</p> <p>Before getting started, review Agentforce (Default) Considerations.</p>	 Important Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See Migrate from Agentforce (Default) to Agentforce Employee Agent .	To create and manage Agentforce (Default): Manage AI Agents AND Manage Agentforce Default Agent OR Customize Application To use Agentforce (Default), see Give Users Access to Agentforce (Default) .
Agent for Setup	 Note Agent for Setup is no longer being updated. We recommend that you use the Setup Agent under Setup with Agentforce (Beta), which can help with many more administrative tasks and is automatically updated with new functionality.	Available in Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions	To create and manage Agent for Setup: Customize Application OR Agentforce Default Admin permission set AND View Setup and Configuration To use Agent for Setup: Access Agentforce Default Agent permission set AND View Setup and Configuration

Agent Type	What it Does	Required Editions	Required Permissions
	<p>Helps your org admins with every day administration tasks, looks for answers in Salesforce Help, and more.</p> <p>Before getting started, review Agent for Setup Considerations.</p>		
Employee Agent	<p>Assists employees by providing access to company knowledge, performing tasks, and streamlining workflows across departments.</p> <p>Before getting started, review Considerations for Agentforce Employee Agent.</p>	<p>Available in Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions.</p> <p>Access to some standard agent actions requires additional add-on licenses.</p> <p>Agentforce Employee agents require Flex Credits.</p>	<p>To create and manage Agentforce Employee Agent: Manage AI Agents</p> <p>To use Agentforce Employee Agent, see Manage Employee Agent Access.</p>
Lead Nurturing (formerly known as SDR)	<p>Intelligently engages leads with personalized content, answers common questions, and schedules meetings.</p> <p>Before getting started, review Considerations for Using Agentforce Lead Nurturing.</p>	<p>Available in Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions</p>	<p>See SDR Agent Permission Sets.</p>
Sales Coach	Intelligently gives reps personalized, actionable, and stage-	Available in Enterprise, Performance, Unlimited, and Developer Editions with Foundations or	See Agentforce Sales Coach Permissions .

Agent Type	What it Does	Required Editions	Required Permissions
	<p>specific feedback on their sales pitch or role-play session.</p> <p>Before getting started, review Generative AI Considerations for Agentforce Sales Coach.</p>	Agentforce 1 Editions	
Service Agent	<p>Intelligently supports your customers with common inquiries and escalates complex issues.</p> <p>Before getting started, review Considerations for Agentforce Service Agent.</p>	Available in Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions. Access to some standard agent actions requires additional add-on licenses .	To create and manage Agentforce Service agents: Manage Agentforce Service Agents permission set AND Manage AI Agents To let the agent user securely access data and perform actions, see Best Practices for Agent User Permissions .
Service Assistant	<p>Intelligently helps your service reps resolve cases faster with case summaries and step-by-step resolution guidance.</p> <p>Before getting started, review Considerations for Service Assistant.</p>	Available in Enterprise, Performance, and Unlimited Editions with Foundations and the Agentforce for Service add-on or Agentforce 1 Service Edition	See Permissions and Licensing for Service Assistant .
Setup Agent (Beta)	Helps your Salesforce admins complete Setup tasks, such as managing users, troubleshooting issues, and customizing your org. This agent is created automatically when you enable Setup	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions	To enable Setup with Agentforce: Customize Application AND Data Cloud User permission set To use Setup with Agentforce: Use Setup with Agentforce AND

Agent Type	What it Does	Required Editions	Required Permissions
	<p>with Agentforce (Beta) and isn't visible or able to be customized in Agentforce Builder.</p> <p>Before getting started, review Considerations for Setup with Agentforce (Beta).</p>		Execute Prompt Template AND Access to the Data 360 default data space AND Data Cloud User permission set AND The required permissions for the task you want to perform. See Agentforce Capabilities in Setup (Beta) .

Considerations for Agentforce Service Agent

To use Agentforce Service Agent, consider supported functionality, usage, limitations and allowances, limits, and other issues.

Considerations for Agentforce Employee Agent

Before setting up an Agentforce Employee agent, keep these considerations in mind.

Agentforce (Default) Considerations

To use Agentforce (Default), consider supported functionality, usage, limits and allowances, and more.

See Also

[Agentforce Considerations](#)

[Agent Execution Context and Data Access by Type](#)

Considerations for Agentforce Service Agent

To use Agentforce Service Agent, consider supported functionality, usage, limitations and allowances, limits, and other issues.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

Agentforce Service Agent Language and Locale Support

Agentforce Service Agent supports these languages and locales.

 **Note** This list is for languages supported by Agentforce. For a list of languages supported by the

Salesforce platform as a whole, see [Supported Languages](#).

Language	Locale	Code
English	English (Australia)	en_AU
	English (United Kingdom)	en_UK
	English (United States)	en_US
Arabic (Beta)	None	ar
Bulgarian	None	bg
Catalan	None	ca
Chinese Simplified	Chinese (China)	zh_CN
Chinese Traditional	Chinese (Taiwan)	zh_TW
Croatian	None	hr
Czech	None	cs
Dutch	None	nl
Danish	None	da
Estonian	None	et
Finnish	None	fi
French	French (Canada)	fr_CA
	French (France)	fr_FR
German	German (Germany)	de_DE
Greek	None	el
Hebrew (Beta)	None	he
Hindi	None	hi
Hungarian	None	hu
Indonesian	None	id
Italian	Italian (Italy)	it_IT
Japanese	Japanese (Japan)	ja_JA
Korean	None	ko
Malay	None	ms

Language	Locale	Code
Norwegian	None	no
Polish	None	pl
Portuguese	Portuguese (Brazil)	pt_BR
	Portuguese (Portugal)	pt_PR
Romanian	None	ro
Spanish	Spanish (Spain)	es_ES
	Spanish (Mexico)	es_MX
Swedish	None	sv
Tagalog	None	tl
Thai	None	th
Turkish	None	th
Vietnamese	None	vi

See [Agentforce Considerations](#) for additional language and locale support considerations.

Agentforce Service Agent Large Language Model Support

Agentforce Service Agent supports these models.

Model
OpenAI GPT-4o

Einstein Trust Layer Service Support

Agentforce Service Agent supports these Trust Layer services.

service	Description
Zero Data Retention Policy	<p>Your data isn't retained by third-party LLMs. We partner with all our external model providers, such as OpenAI, to enforce the zero-data retention policy.</p> <ul style="list-style-type: none"> No data is used for LLM model training or

Service	Description
	<p>product improvements by third-party LLMs.</p> <ul style="list-style-type: none"> • No data is retained by the third-party LLMs. • No human being at the third-party provider looks at data sent to their LLM.
Dynamic Grounding with Secure Data Retrieval	<ul style="list-style-type: none"> • Relevant information from a Salesforce record is merged with the prompt to provide context. • Secure data retrieval of Salesforce data for grounding the prompt based on the permissions of the user executing the prompt. • Secure data retrieval preserves in place all standard Salesforce role-based controls for user permissions and field-level security when merging grounding data from your CRM instance or Data 360.
Prompt Defense (System policies and prompt injection detection)	<ul style="list-style-type: none"> • System policies help limit hallucinations and decrease the likelihood of unintended or harmful outputs by the LLM. • System policies can vary for different generative AI features and use cases.
Toxicity Detection	<p>Potentially harmful LLM responses are detected and flagged.</p>
Audit and Feedback	<ul style="list-style-type: none"> • Prompts, responses, and trust signals are logged and stored in Data 360. • Feedback can be used for improving prompt templates. • Provides pre-built reports and dashboards for analysis.

Data masking through the Einstein Trust Layer is disabled to improve the performance and accuracy of agents. Ask your system administrator about which Einstein Trust Layer services are enabled in your org and available for service agents.

Service Agents and Einstein Requests Usage

Einstein Requests is a usage metric 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 Service Agent is a consumption-based product that uses Einstein and stores and processes data using Data 360. ASA consumes credits used for billing based on your usage of the feature.

Usage Types Billed by Agentforce Service Agent

 **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](#).

Card	Type	Description	Notes
Flex Credits	Standard Action	<p>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.</p> <p>Actions involving lengthy prompts sent 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</p>	

Card	Type	Description	Notes
		<p>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	<p>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 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. 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</p>	

Card	Type	Description	Notes
		how standard actions become custom actions, see Editing Standard Agent Action Reference Actions .	
Flex Credits	Standard Voice Action	<p>Usage is determined by the number of standard actions executed by the agent in a voice conversation.</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 Voice Action	<p>Usage is determined by the number of custom actions executed by the agent in a voice conversation.</p> <p>Custom actions are actions that are created by you or which result from your modification of a standard action. To learn more</p>	

Card	Type	Description	Notes
		<p>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>	
Conversations	Agentforce: ASA Messaging	<p>For this subtype of the Agentforce usage type, usage is calculated based on conversation windows. A conversation window starts:</p> <ul style="list-style-type: none"> when the user sends a message for the first time after the previous conversation window ends, or when ASA sends a pre-configured welcome message first. <p>The end of the conversation window differs for each Digital Engagement channel on which ASA is enabled.</p> <p>For the Enhanced Chat channels:</p> <ul style="list-style-type: none"> Enhanced Web Chat: For unauthenticated users, the conversation window ends when the user explicitly clicks End Conversation. For authenticated users, the conversation window ends 24 hours after the start of the conversation. Enhanced In-App Chat: The conversation window ends 24 hours after the start of the conversation. 	<p>Agentforce Service Agent (ASA) only supports inbound conversations, which are conversations that a user initiates. See Generative AI Billable Usage Types.</p>

Card	Type	Description	Notes
		<p>For these channels, the conversation window ends 24 hours after the start of the conversation:</p> <ul style="list-style-type: none"> • Enhanced WhatsApp • Enhanced Facebook Messenger • Enhanced Apple Messages for Business • Enhanced SMS • Bring Your Own Channel • Enhanced LINE 	
Einstein Requests	Einstein Requests	<p>Einstein Requests is one of the usage metrics for generative AI. The use of generative AI capabilities, in either a production or sandbox environment, can consume Einstein Requests and possibly Data 360 credits. To learn when Einstein Requests applies, see Metering for Agentforce and Generative AI Usage.</p> <p>Direct API calls to the LLM gateway use Einstein Requests. To learn more, see the Rate Card for Einstein Requests.</p> <p>Einstein Requests are available in:</p> <ul style="list-style-type: none"> • Enterprise, Performance, and Unlimited editions with an Einstein for Sales, Einstein for Platform, or Einstein for Service add-on. To purchase the Einstein for Sales, Einstein for Platform, or Einstein for Service add-on, contact your Salesforce account executive. • All Einstein 1 Editions 	<p>See Einstein Requests Billable Usage Types.</p>

Card	Type	Description	Notes
		<ul style="list-style-type: none"> Salesforce Enterprise and Unlimited Editions with Marketing Cloud Next Growth or Advanced Edition 	
Data Services	Batch Data Pipeline	Usage is calculated based on the amount of batch data processed by Data 360 data streams across all connectors.	
Data Services	Data Queries	<p>Usage is calculated based on the number of records processed.</p> <p>The count of records processed depends on the structure of a query as well as other related factors such as the total number of records in the objects being queried.</p>	
Data Services	Unstructured Data Processed	<p>Usage is calculated based on the amount of unstructured data that is processed. For example, if the search index processes 100 PDF documents that are 1 MB each, usage is calculated as 100 MB. If the search index processes five audio/video files that are on average 100MB each, usage is calculated as 500MB.</p> <p>In Data 360, unstructured data may be chunked and vectorized using an embedding model. Usage is computed only once across both these activities. For example, if one 100 MB PDF document is chunked and vectorized, usage is computed as 100 MB, not as 200MB.</p>	
Data Storage	Storage	Usage is calculated based on the	Storage refers to the amount of

Card	Type	Description	Notes
	Beyond Allocation	amount of storage used above the amount allocated.	data stored in Data 360. Storage used outside of Data 360, such as data stored on the Salesforce Lightning Platform, isn't counted toward this limit. Data you ingest into Data 360 for Agentforce Service Agents conversations is counted toward your storage allocation. If you use more data than allocated, usage is charged.

Service Agent Limits

- When an incoming customer message exceeds the character limits of the messaging channel, the message isn't delivered, and no response is generated. Different messaging channels have different character limits.
 - Facebook allows up to 2,000 characters.
 - LINE allows up to 5,000 characters.
 - SMS allows up to 912 characters, but if the message includes special characters, this limit decreases to 396 characters.
 - WhatsApp allows up to 4,096 characters.
 - Apple Messages for Business allows up to 50,000 characters.
- An Agentforce Service Agent session is closed 24 hours after the start of the conversation, after 2 hours of inactivity, or when the user explicitly ends the conversation. For more information, see [Agentforce and Generative AI Usage and Billing](#).

ASA and Agentforce Builder Considerations

- Currently, Agentforce Service Agent doesn't support these standard topics:
 - General CRM
 - Single Record Summary
- Currently, Agentforce Service Agent doesn't support these standard actions:
 - Identify Object by Name
 - Identify Record by Name
 - Query Records
 - Query Records With Aggregate
 - Summarize Record
 - Draft or Revise Email
 - Update Record Fields
 - Extract Fields And Values From User Input
- In the Agentforce Builder preview conversation, you see agent messages in plain text. Message formatting in the builder preview isn't always identical to messaging channel experiences. Before

adding your agent to your messaging channels, chat with your agent in a test channel.

Other Considerations

- When an agent is deactivated and connected to an active Enhanced Chat deployment, the chat window appears, but the agent doesn't join the conversation.
- The APIs required to connect Data 360 to service agents are compatible only with the default dataspace.
- When a customer sends multiple messages consecutively, the agent processes the messages sequentially. The customer receives a response to their first message, then a response to their second message, and so on. To prevent customers from sending multiple messages consecutively, add the `enableUserInputForConversationWithBot` code snippet to your Messaging for Web deployment or Experience Cloud header markup. See [Enhanced Web Chat Reference: Settings Object](#).

See Also

[Agentforce Considerations](#)

[Rate Card for ASA](#)

[About Digital Wallet](#)

[Digital Wallet-Enabled Products and Rate Cards](#)

[Agentforce Considerations](#)

Considerations for Agentforce Employee Agent

Before setting up an Agentforce Employee agent, keep these considerations in mind.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

Employee Agent Language and Locale Support

Agentforce Employee agent supports these languages and locales.

 **Note** This list is for languages supported by Agentforce. For a list of languages supported by the Salesforce platform as a whole, see [Supported Languages](#).

Language	Locale	Code
English	English (Australia)	en_AU
	English (United Kingdom)	en_UK

Language	Locale	Code
	English (United States)	en_US
Arabic (Beta)	None	ar
Bulgarian	None	bg
Catalan	None	ca
Chinese Simplified	Chinese (China)	zh_CN
Chinese Traditional	Chinese (Taiwan)	zh_TW
Croatian	None	hr
Czech	None	cs
Dutch	None	nl
Danish	None	da
Estonian	None	et
Finnish	None	fi
French	French (Canada)	fr_CA
	French (France)	fr_FR
German	German (Germany)	de_DE
Greek	None	el
Hebrew (Beta)	None	he
Hindi	None	hi
Hungarian	None	hu
Indonesian	None	id
Italian	Italian (Italy)	it_IT
Japanese	Japanese (Japan)	ja_JA
Korean	None	ko
Malay	None	ms
Norwegian	None	no
Polish	None	pl
Portuguese	Portuguese (Brazil)	pt_BR

Language	Locale	Code
	Portuguese (Portugal)	pt_PR
Romanian	None	ro
Spanish	Spanish (Spain)	es_ES
	Spanish (Mexico)	es_MX
Swedish	None	sv
Tagalog	None	tl
Thai	None	th
Turkish	None	th
Vietnamese	None	vi

See [Agentforce Considerations](#) for additional language and locale support considerations.

Employee Agent Large Language Model Support

The Agentforce platform supports OpenAI GPT-4o for reasoning engine calls. Agent actions can make calls to other predefined LLMs. Bringing your own model isn't supported, but custom actions that execute prompt templates can use any Salesforce-managed model. See [Large Language Model Support](#).

Model
OpenAI GPT-4o

Einstein Trust Layer Service Support

Agentforce Employee agent supports these Trust Layer services.

Einstein Trust Layer service	Description
Zero Data Retention Policy	Einstein Trust Layer uses a zero-data retention policy, so no data is stored or used for model training by third-party LLMs. Customers' use of other features including agents may result in data storage. For more information, contact your Salesforce account executive.
Dynamic Grounding with Secure Data Retrieval	Relevant information from trusted company data, your knowledge base, or other sources you configure, is used to answer a question.

Einstein Trust Layer service	Description
Prompt Defense (System policies and prompt injection detection)	System policies help limit hallucinations and decrease the likelihood of unintended or harmful outputs by the LLM.
Toxicity Detection	Potentially harmful LLM responses are detected and flagged.
Audit and Feedback	Prompts, responses, and trust signals are logged and stored in Data 360, giving you visibility into the results of each user interaction. Feedback can be used to improve instructions, prompt templates, and more.

Data masking through the Einstein Trust Layer is disabled to improve the performance and accuracy of agents. Ask your system administrator about which Einstein Trust Layer services are enabled in your org and available for employee agents.

Usage Types Billed by Agentforce Employee Agent

Agentforce Employee agents use generative AI in prompt executions and use Data 360 to ingest, store, and process data. Use of Agentforce Employee agents impacts the consumption of billing credits in these usage types. 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](#).

Metered and Unmetered Consumption

Agentforce Employee agent usage 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. For more information, see [Considerations for Unmetered Agentforce Usage](#).

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	This usage type isn't billed when it's associated with a generative AI action that qualifies as unmetered human context usage. For more

Digital Wallet Card	Usage Type	Description	Notes
		<p>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 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</p>	information, see Generative AI Usage and Billing .

Digital Wallet Card	Usage Type	Description	Notes
		for which they don't have a license when the requirement is enforced.	
Flex Credits	Custom Action	<p>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 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. 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>	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 Generative AI Usage and Billing .

When you use Agentforce Employee agents, credits can be consumed in usage types on other consumption cards by related features such as [Agentforce Data Library](#) or [Audit and Feedback](#).

Other Considerations

Agentforce Employee agents are supported in employee channels, including the Agentforce panel in Lightning Experience, Slack, and the Salesforce mobile app.

- If you plan to deploy multiple employee agents, describe each agent's purpose, such as departmental scope or business function, to prevent overlapping topics.
- Grant access to specific Employee agents using [permission sets or profiles](#) based on employee roles or groups.
- Connecting Employee agents to Slack or mobile apps involves additional authentication or licensing steps.
- Maintain a clear and organized conversation design and topic structure to drive consistent performance and usability as you scale your deployment.

See Also

[Agentforce Considerations](#)

[Salesforce Help: Flex Credits Usage Types](#)

Agentforce (Default) Considerations

To use Agentforce (Default), consider supported functionality, usage, limits and allowances, and more.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

 **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

Language and Locale Support

Agentforce (Default) can generate responses in these languages.

-  **Note** Enhanced language support for Agentforce (Default) is a pilot or beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the [Product Terms Directory](#). Use of this pilot or beta service is at the Customer's sole discretion.
-  **Note** This list is for languages supported by Agentforce. For a list of languages supported by the Salesforce platform as a whole, see [Supported Languages](#).

Language	Locale	Code
English	English (Australia)	en_AU

Language	Locale	Code
	English (United Kingdom)	en_UK
	English (United States)	en_US
Arabic (Beta)	None	ar
Bulgarian	None	bg
Catalan	None	ca
Chinese Simplified	Chinese (China)	zh_CN
Chinese Traditional	Chinese (Taiwan)	zh_TW
Croatian	None	hr
Czech	None	cs
Dutch	None	nl
Danish	None	da
Estonian	None	et
Finnish	None	fi
French	French (Canada)	fr_CA
	French (France)	fr_FR
German	German (Germany)	de_DE
Greek	None	el
Hebrew (Beta)	None	he
Hindi	None	hi
Hungarian	None	hu
Indonesian	None	id
Italian	Italian (Italy)	it_IT
Japanese	Japanese (Japan)	ja_JA
Korean	None	ko
Malay	None	ms
Norwegian	None	no
Polish	None	pl

Language	Locale	Code
Portuguese	Portuguese (Brazil)	pt_BR
	Portuguese (Portugal)	pt_PR
Romanian	None	ro
Spanish	Spanish (Spain)	es_ES
	Spanish (Mexico)	es_MX
Swedish	None	sv
Tagalog	None	tl
Thai	None	th
Turkish	None	th
Vietnamese	None	vi

See [Agentforce Considerations](#) for additional language and locale support considerations.

Supported Large Language Model

Agentforce (Default) supports OpenAI GPT-4o for reasoning engine calls. Agent actions can make calls to other predefined LLMs. Bringing your own model isn't supported, but custom actions that execute prompt templates can use any Salesforce-managed model. See [Large Language Model Support](#).

Einstein Trust Layer Service Support

Agentforce (Default) supports these Trust Layer services.

Einstein Trust Layer service	Description
Zero Data Retention Policy	Einstein Trust Layer uses a zero-data retention policy, so no data is stored or used for model training by third-party LLMs. Customers' use of other features including agents may result in data storage. For more information, contact your Salesforce account executive.
Dynamic Grounding with Secure Data Retrieval	Relevant information from trusted company data, your knowledge base, or other sources you configure, is used to answer a question.
Prompt Defense (System policies and prompt injection detection)	System policies help limit hallucinations and decrease the likelihood of unintended or harmful

Einstein Trust Layer service	Description
	outputs by the LLM.
Toxicity Detection	Potentially harmful LLM responses are detected and flagged.
Audit and Feedback	Prompts, responses, and trust signals are logged and stored in Data 360, giving you visibility into the results of each user interaction. Feedback can be used for improving instructions, prompt templates, and more.

Data masking through the Einstein Trust Layer is disabled to improve the performance and accuracy of agents. See [Trust and Agents](#).

Agentforce (Default) and Einstein Requests Usage

Einstein Requests is a usage metric 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 (Default) is a consumption-based product that uses Einstein and stores and processes data using Data 360. Agentforce (Default) consumes credits used for billing based on your usage of the feature.

Other Considerations

Agentforce (Default) is supported in employee channels, including the Agentforce panel in Lightning Experience, Slack, the Salesforce mobile app, the Field Service mobile app, and Sales Cloud Everywhere.

- Conversation history applies to the current session only. Messages from up to the most recent six turns, including agent and user messages, are used as context. To keep the context focused on CRM use cases, messages such as “hello” aren’t included.
- Agentforce (Default) sessions are specific to a browser tab. A new session is started when a user refreshes their browser tab or opens Agentforce (Default) in another tab.
- For any user request that returns a list, an agent shows up to 50 records when the user selects **View More**, even if the number of records is larger than 50. The 50 records are shown in a record page, not in the agent conversation.
- If a supported agent action is triggered by a user’s request, Agentforce (Default) is aware of which page the user is on. Sometimes the agent maintains the previous page’s context when you update fields or switch between records in a conversation.
- Agentforce (Default) can’t make proactive suggestions. Users must enter a request or ask a question to start a conversation with the agent.

See Also

Agentforce Considerations

Agent Execution Context and Data Access by Type

Learn how Agentforce Employee, Lead Nurturing (Sales), and Service agents run actions and how data access is controlled for each agent type.

Execution Context by Agent Type

Execution context varies by agent type, channel, and whether [credential-based user verification](#) is enabled (available for agents connected to Enhanced Chat v1 and deployed to Experience Cloud sites only).

	Employee Agents	Lead Nurturing Agents	Service Agents
Primary Use Case	Internal employees	Automated outreach to external leads, prospects, and customers	External customers and partners
Supported Channels	Lightning Experience, the Salesforce mobile app, Slack, and Enhanced Web Chat v1 (Experience Cloud sites only)	Outbound email	Enhanced messaging channels, including Enhanced Chat v1 and Enhanced Chat v2
Runs As	Logged-in end user	Agent User (EinsteinSDRAGent User)	Without credential-based user verification: Agent User (EinsteinServiceAgent User) With credential-based user verification: Logged-in site user (Enhanced Chat v1 and Experience Cloud sites only)
Data Access Governed By	End user's profile, permissions, field-level security, and sharing rules	Agent user profile, permissions, field-level security, and sharing rules	Without credential-based user verification: Agent user profile, permissions, field-level

	Employee Agents	Lead Nurturing Agents	Service Agents
			<p>security, and sharing rules</p> <p>With credential-based user verification: Logged-in site user's profile, permissions, field-level security, and sharing rules (Enhanced Chat v1 and Experience Cloud sites only)</p>
User Identified By	Logged-in end user	Lead or contact context	<p>Without credential-based user verification: Context variables (for example, <code>MessagingSession.ContactId</code>). Context variables tell the agent who the user is but don't control data access.</p> <p>With credential-based user verification: Logged-in site user (Enhanced Chat v1 and Experience Cloud sites only)</p>

Flow Run Context and Agent Execution

Flows run in user context or system context. When an agent action runs a flow, both the flow's run context and the agent's execution context apply. [Learn more about flow run context](#).

Flow Run Context	Common Use	Object and Field Access	Sharing Rules
User	Standard interactive flows	Governed by running user's permissions and field-level access	Running user's sharing rules
System context with	Elevated access that	All objects and fields	Running user's sharing

Flow Run Context	Common Use	Object and Field Access	Sharing Rules
sharing	respects data visibility		rules
System context without sharing	Background automation that requires full access	All objects and fields	N/A

-  **Note** When a Service agent runs in the agent user context (in other words, without credential-based user verification enabled), the running user of the flow is the agent user (`EinsteinServiceAgent User`), not the customer or end user.

Employee Agent Execution Context Details

Agentforce Employee agents are intended for internal users accessing the system via Lightning Experience, the Salesforce mobile app, an Experience Cloud portal, or Slack—not unauthenticated external customers. Employee agents operate under the logged-in user's execution context. The user's profile, permission sets, and sharing rules/role determine the agent's actions and responses. It's not necessary to explicitly scope queries and actions to user-specific data. User access to Employee agents is managed through permission sets or profiles.

[Get started with an Agentforce Employee agent.](#)

Lead Nurturing Agent Execution Context Details

Agentforce Lead Nurturing agents are intended for top-of-funnel autonomous lead engagement. They can operate 24/7, sending customized emails, booking meetings, and answering prospect questions. Lead Nurturing agents run as a dedicated `EinsteinSDRagent User`, which is created and assigned [system-level permissions](#) during agent setup. Prospects are assigned to the agent by assignment rules, automated actions, or individual sales users.

[Get started with an Agentforce Lead Nurturing agent.](#)

Service Agent Execution Context Details

Agentforce Service agents are intended for customer-facing use cases and connect to enhanced Messaging channels, which support authenticated and unauthenticated external users. The agent's data access and execution context depend on the channel and whether credential-based user verification is enabled.

- Generally, the agent's data access and execution context is determined by [an agent user](#)—a unique user record for the agent with all of the permissions that the agent needs to do its job. The agent runs in the context of the agent user and respects the agent user's profile, permissions, field-level security, and sharing rules.
- If you're using Enhanced Chat v1 to deploy a Service agent to an Experience Cloud site, you can turn

on [credential-based user verification](#). When credential-based user verification is enabled, the agent runs in the context of the logged-in site user and respects the user's profile, permissions, field-level security, and sharing rules.

When a Service agent runs in the context of the agent user, [context variables](#) (for example, `MessagingSession.ContactId`) are used to pass the customer's identity to the agent, but they don't control data access. Without additional configuration, the customer has access to all of the records that the agent user has access to. You must proactively limit data access.

- **Pass verified customer IDs into the custom `VerifiedCustomerId` variable.**
If you use the standard [Customer Verification](#) or [Service Customer Verification](#) topics for user verification in your agent, the actions are configured to store the user's ID in the `VerifiedCustomerId` variable after their identity is successfully verified. If you don't, you can create a custom agent action and an Apex class or flow to pass the verified ID to your agent and store it in the `VerifiedCustomerId` variable.
- **Explicitly scope Apex classes and flows called by standard and custom agent actions to customer records (`WHERE ContactId = VerifiedCustomerId`).**
Some standard actions support customer verification out of the box—for example, the [Get Cases for Verified Contact](#) action calls a flow that looks up the customer's contact ID, checks it against the `VerifiedCustomerId` variable, and uses the verified customer ID to scope its queries. However, you should carefully test and customize each action to meet your security needs.
- **Create filters (`VerifiedCustomerId is not None`) to restrict access to topics and actions to verified customers.**

[Get started with an Agentforce Service agent.](#)

See Also

[Agent Types and Considerations](#)

Plan Your AI Agent

Planning an AI agent is crucial for several reasons. It ensures that your AI project aligns with your company's overall AI strategy and business goals. It also helps you define the agent's work and assess its potential impact on the organization.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

Addressing concerns and risks upfront by integrating risk management into the planning stage can accelerate projects and ensure they meet ethical, legal, regulatory, and security requirements. Without proper planning, an agentic AI project might fail to deploy or be scrapped entirely.

Although careful planning is important, try to strike a balance between experimentation and planning. When you're getting started with Agentforce, hands-on learning and prototyping are essential for understanding AI agents and testing out ideas.

What is an Agentforce Use Case?

An Agentforce use case is an application of AI technology where an AI agent takes an action or series of actions that accomplish a goal or job-to-be-done on behalf of your employees, customers, or organization.

Define an Agentforce Use Case

After identifying your use case ideas for Agentforce, flesh out each of the use cases so your organization can assess and prioritize them. Remember, this stage of the planning process is about the project goals, not the technical solution.

Define the Technical Requirements

When planning an AI agent, gather technical requirements that will help you build the right solution. Key factors to explore include: data, channels, routing and escalation, and security controls.

Salesforce Considerations for Agentforce Projects

Your AI agent must coexist with your current Salesforce configuration and architecture. Consider Salesforce-specific factors that can influence your Agentforce implementation.

Identify Risks and Guardrails for an Agentforce Project

Autonomous AI agents come with risks, such as security threats, data breaches, reputational harm, financial loss, bias, hallucinations, and issues with transparency and accountability. When planning an AI agent, identify risks for your Agentforce use case and plan risk mitigation strategies.

Map Business Processes for an Agentforce Project

When planning an AI agent, it's important to define the work the agent will do. One way to define the work is to map the business processes related to your Agentforce use case.

Identify the Topics and Actions

After determining your agent's use case and the work the agent will do, you can identify the right topics and actions for the agent. Agents are made up of topics, which define the different jobs an agent can do. Topics also contain a set of actions, which are the tools the agent can use to do its job.

Design the Topics and Actions

After identifying the right topics and actions for your AI agent, start planning how to build them. Following best practices when designing the topics and actions can help your agent perform reliably and effectively.

What is an Agentforce Use Case?

An Agentforce use case is an application of AI technology where an AI agent takes an action or series of actions that accomplish a goal or job-to-be-done on behalf of your employees, customers, or organization.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

As you begin collecting ideas for Agentforce use cases—whether through crowdsourcing, business process review, user research, or market analysis—you might notice that some ideas lend themselves well to autonomous AI applications, and some don't. When evaluating potential use cases for autonomous AI, consider the following questions:

- **Value:** Why are you delegating this work to an AI agent? Is the agent faster or more accurate? Will it provide a better experience?
- **Work:** Can you describe the work the AI agent will do? Do you fully understand all the business processes involved in that work?
- **Decision-making:** Does the work involve decisions and steps that can be completed without direct human input or judgment? Are there well-defined policies, rules, and constraints that the AI agent can follow alone?
- **Risk:** Can the AI agent operate within the security, legal, ethical, and regulatory requirements that apply to the work?
- **Data:** Is the data capable of supporting the work the AI agent will do?

As you decide on your answers, it's important to understand what agents can do. Often the easiest way to get started is by [building an agent](#) and seeing how its capabilities match with the goals you have for implementation.

See Also

[Salesforce Website: Agentforce Use Cases](#)

[Trailhead: Agentforce: Agent Planning](#)

[Trailhead: AI Strategy](#)

Define an Agentforce Use Case

After identifying your use case ideas for Agentforce, flesh out each of the use cases so your organization can assess and prioritize them. Remember, this stage of the planning process is about the project goals, not the technical solution.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

Identify the Jobs To Be Done

First, describe the work the AI agent will do. Many organizations use the [Jobs to Be Done framework](#) to outline the role of the agent and the tasks it will perform. Be sure to think deeply about the work and its

expected outcomes. It's an essential step in understanding how the agent can impact your organization, customers, and employees.

Determine the Scope

After identifying the work you want the AI agent to do, the next step is figuring out the right amount of work. What's the appropriate scope? Your minimum viable product (MVP) should be the smallest unit of work that it makes sense to deliver. An iterative approach allows you to validate your assumptions, demonstrate value, manage the level of risk, and develop a plan for scaling the AI solution. The scope can be gradually expanded as your organization's AI maturity grows.

Define the Business Value

When you fully understand the scope of the work the AI agent will perform, you can establish the business value of the use case. Be sure to set specific, measurable goals and focus on outcomes. For more information about defining the business value of AI use cases, see [AI Strategy](#).

Evaluate Data Readiness

Next, evaluate your data readiness for the use case. For AI agents to perform optimally, they must be powered by trustworthy, high-quality data that's relevant to the business context. To learn more about data readiness, see [AI + Data: Project Planning](#).

Assess and Prioritize the Use Cases

After defining your Agentforce use cases, your organization can assess the feasibility and impact of the projects and then incorporate them into their prioritized AI roadmap. See [AI Strategy](#) for more information about the factors to consider when refining your AI backlog and which prioritization frameworks you can use.

See Also

[Trailhead: Agentforce: Agent Planning](#)

Define the Technical Requirements

When planning an AI agent, gather technical requirements that will help you build the right solution. Key factors to explore include: data, channels, routing and escalation, and security controls.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

Data

Your organization needs to be data-ready to start an AI project, which means the data for the project is accurate, complete, available, accessible, and securely governed. When defining the data requirements for your Agentforce use case, be sure to assess the data quality, migrate and integrate data, establish data governance, and create a plan for data analytics. To learn more about data requirements, see [AI + Data: Project Planning](#).

Channels

Consider the channels where the AI agent will operate. How will the agent engage with internal or external users? How will the agent be presented to users? See [Deploy Your Agent to Channels](#) to learn more about the different options for deploying agents to channels, such as Slack, email, and messaging platforms.

Routing and Escalation

AI agents sometimes need to escalate conversations to a live representative. Some reasons for escalating to a rep can include company policy, brand requirements, security measures, risk management, or regulatory compliance.

During the planning process, define all the ways in which human decision-making and oversight will occur during the course of the AI agent's work. Clear guidelines about when and how reps should step in will make it easier for your organization to configure the right guardrails as you start prototyping your agent.

Security Controls

When you start planning your AI agent, consider permissions and access for admins, employees, customers, and the AI agent itself.

- Admin Access: To create and manage AI agents in Salesforce, you need the Manage AI Agents user permission and the required permissions for your [agent type](#), or the Customize Application user permission.
- Employee Access: If your employees interact with the AI agent in Salesforce, the agent runs in the context of the currently logged-in Salesforce user. See [Trust and Agents](#).
- Customer Access: If your agent is deployed to external channels, such as your website, there are probably certain actions you don't want an AI agent to perform on behalf of customers unless they're verified. The way you design your authentication solution for Agentforce depends on the security and identification requirements for your particular use case. See [Maintain Trust with Agentforce Actions](#).
- Agent Access: Some AI agents, such as service agents, operate as an agent user, and the agent user has a dedicated user profile and role in Salesforce. The actions the AI agent can take depend on the permissions it's assigned. See [Best Practices for Agent User Permissions](#) to find out how to control what data your AI agent can access.

See Also

[Trailhead: Agentforce: Agent Planning](#)

Salesforce Considerations for Agentforce Projects

Your AI agent must coexist with your current Salesforce configuration and architecture. Consider Salesforce-specific factors that can influence your Agentforce implementation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

Licensing and Provisioning

Each Agentforce project is unique, so the Salesforce products and features you need for your project vary depending on your use case. Check with your Salesforce account executive to confirm the licensing requirements for the specific AI agent you want to build.

Billing and Consumption

Agentforce uses a consumption-based pricing model. For more information on how usage is billed, see [Agentforce Pricing](#). You can also refer to your contract or contact your account executive.

Requirements

To use Agentforce, these products and features must be enabled in your Salesforce org:

- Lightning Experience
- Einstein Generative AI
- Data 360

Einstein Bots

Have you implemented Einstein Bots in your Salesforce org? If so:

- How are the bots being used today?
- How is performance measured?
- Are there specific business outcomes you're trying to improve with generative AI?
- Are you considering [turning your bot into an AI agent](#)?

Existing Automation

With Agentforce, your AI agents use [agent actions](#) as tools to accomplish specific tasks. Those agent actions are built on top of existing Salesforce Platform technology, such as flows, Apex, and prompt templates. Start cataloging any existing automations related to your use case that you might be able to repurpose for your AI agent.

See Also

[Trailhead: Agentforce: Agent Planning](#)

Identify Risks and Guardrails for an Agentforce Project

Autonomous AI agents come with risks, such as security threats, data breaches, reputational harm, financial loss, bias, hallucinations, and issues with transparency and accountability. When planning an AI agent, identify risks for your Agentforce use case and plan risk mitigation strategies.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

As you approach conversations in your organization about AI risk, you can use the People, Business, Technology, and Data framework. These categories and considerations can help you come up with possible risks and concerns related to your Agentforce project.

Category	Considerations
People	<ul style="list-style-type: none">• Empowerment: Roles and responsibilities, hiring, training, and upskilling• Culture and practice: Human-centered AI design, change management, adoption
Business	<ul style="list-style-type: none">• Value: Benefits, objectives, KPI, and metrics• Operations: Org structure, capability management, processes and workflows, AI governance, DevOps strategy
Technology	<ul style="list-style-type: none">• AI tooling: AI infrastructure, applications, APIs, prompts, security safeguards• AI models: Model selection, training considerations, management, cost

Category	Considerations
Data	<ul style="list-style-type: none"> • Quality: Fit for use, accuracy, completeness, accessibility, recency, and more • Strategy: Data management, infrastructure, governance, analytics

Use this framework to discuss concerns related to your Agentforce use case. Your project stakeholders can brainstorm potential risks for each category.

After cataloging the risks and concerns, come up with mitigation strategies for each risk. Some of the mitigation strategies will translate into agent guardrails in Agentforce. When you’re done with the risk mitigation exercise, document the risks and guardrails for your use case. Capturing risk mitigation activities is important for regulatory compliance and useful for internal audits.

To see an example of risks and guardrails for an Agentforce project, complete the [Define the Agent Guardrails](#) unit on Trailhead.

See Also

[Trailhead: Trusted Agentic AI](#)

Map Business Processes for an Agentforce Project

When planning an AI agent, it’s important to define the work the agent will do. One way to define the work is to map the business processes related to your Agentforce use case.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

[Process mapping](#) is a visual representation of the steps in a business process from start to finish, typically using diagrams like flow charts or swimlanes. It helps define the work an AI agent will do by depicting the sequence of steps, start and end points, and required inputs and data.

As you outline the business processes you want to delegate to an agent, consider these questions.

- What goal is the user trying to accomplish?
- How might the user express their goal or intent? How would they phrase their questions or requests?
- What processes are involved in achieving the goal?
- When does each process begin and end? What steps need to be taken? In what order?
- What company policies, rules, and guidelines apply to the process? What guardrails are relevant to each step?
- At what points in the process are decisions made and how?

- What clarifying or follow-up questions might the agent need to ask?
- When would a user need to confirm something before a step proceeds?
- What data is required? What's optional?
- What input do you need to collect from users? Does that input need to be in a specific format or syntax?
- What are the outcomes of each step or process? How is the output used? How is success measured?
- Are there situations when specific language should be used when communicating with users?
- What questions or paths of conversation should never be pursued?
- Under what conditions should the conversation be escalated to a live service rep?

Even if you don't create formal diagrams for each of your business processes, it's still important to think deeply about the work the agent will do so that you design the right solution.

See Also

[Video: Agentforce: Mapping Jobs-to-be-Done](#)

Identify the Topics and Actions

After determining your agent's use case and the work the agent will do, you can identify the right topics and actions for the agent. Agents are made up of topics, which define the different jobs an agent can do. Topics also contain a set of actions, which are the tools the agent can use to do its job.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

When identifying the topics and actions for your agent, there are two possible approaches: top-down and bottom-up. In the top-down approach, first identify the topics, then define the relevant actions for those topics. In the bottom-up approach, first list all of the individual actions for your agent, then group them into related topics.

Bottom-up Example:

List the Actions

To come up with ideas for agent actions, review the [business processes](#) related to the work your AI agent will do, and then list all the tasks the agent should be able to perform. At this stage, it's better to be too specific rather than too general. Avoid trying to group or simplify actions prematurely. The goal is to create a comprehensive and granular view of what the agent can do.

For example, in the case of a customer service agent, the initial list might include:

- Answer general FAQs

- Find customer orders
- Look up items related to an order
- Check order status
- Check delivery status
- Return an order
- Exchange an order
- Look up return and exchange policies
- Check inventory availability
- Check promotion availability
- Troubleshoot technical problems
- Find customer assets and warranties

Note that an action like “Resolve customer complaints” is too broad because customers can have different types of complaints: problems with an order, technical issues, or delivery questions. Actions should represent the smallest level of granularity in agent behavior.

Identify Overlapping or Similar Actions

Flag actions that are too similar because they can cause confusion for the reasoning engine. If the actions aren’t different enough semantically, then the [reasoning engine](#) won’t know which action to select when a user asks a question or makes a request.

For example, “Troubleshoot technical problems” and “Answer general FAQs” might have descriptions that are similar, but their functionality is different. Identifying semantic overlaps can help to determine which actions to separate over multiple topics.

Group Actions into Topics

After actions are clearly defined, they can be grouped into preliminary topics. A topic is a logical category of functionality—a grouping of actions that together represent a job, capability, or skill of the agent.

Follow these guidelines:

- Aim to use the minimum number of topics necessary to avoid semantic overlap.
- Make sure that each topic contains actions that are meaningfully related.
- If certain actions must be executed in a chain, include them in the same topic.

Here’s an example of the topic and action groupings for a customer service agent:

Topic 1: Order Management

- Find customer orders
- Look up items related to an order
- Check order status
- Check delivery status
- Check inventory availability

Topic 2: Troubleshooting

- Troubleshoot technical problems
- Find customer assets and warranties

Topic 3: Returns and Exchanges

- Look up return and exchange policies
- Return an order
- Exchange an order

Topic 4: Product Support

- Answer general FAQs
- Check promotion availability

 **Tip** You can build your Agentforce topics and actions from scratch, but there are also [templates](#) you can use to get up and running quickly. Another fast way to build topics and actions is to [create them using generative AI](#).

See Also

[The Building Blocks of Agents](#)

Design the Topics and Actions

After identifying the right topics and actions for your AI agent, start planning how to build them. Following best practices when designing the topics and actions can help your agent perform reliably and effectively.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

As you plan your topics and actions, simultaneously build and test your AI agent in a sandbox environment. Try different approaches to figure out what works and what doesn't. The key is to use prototyping and continuous refinement to guide your planning and development efforts.

Design the Topics

Topics are an important component of Agentforce because they define the AI agent's goals and provide the context and direction it needs to achieve those goals. When building an agent, you can customize standard topics to get up and running quickly, or you can create custom topics that are tailored to your business. To learn how to design topics, review the different [parts of a topic](#) and follow the [best practices for topic instructions](#).

Design the Actions

If none of the [standard agent actions](#) suit your needs, you can build custom actions for your AI agent. When you create a custom action, you build it on top of existing platform functionality that you want to make available in Agentforce-invocable and REST Apex classes, autolaunched flows, prompt templates, external services, and MuleSoft APIs. In Agentforce, that underlying functionality is called a *reference action*.

Design Considerations for Reference Actions

Here are some factors to consider when approaching the design of the underlying reference actions for your agent actions.

Deterministic or Prompt-Based

When developing the underlying platform functionality for your agent actions, first review the business processes and tasks related to your use case. Then decide whether the process or task should be deterministic or prompt-based.

- Deterministic: Uses an invocable or REST Apex class or autolaunched flow to generate output. Actions based on flows or Apex are deterministic and use business logic and rules to produce a consistent outcome.
- Prompt-based: Uses one or more prompt templates to generate output. A prompt-based action lets you control how a response is written or use reasoning and generative capabilities of an LLM. For example, to generate a summary or perform sentiment analysis, you need to use a prompt template as a reference action. Prompt templates are also used to ground an agent in data, such as knowledge or external system data.

Keep in mind that an action can combine both deterministic and prompt-based approaches. For example, an Appointment Management topic might include an action that cancels appointments. When a user asks to cancel their appointment, the flow-based action is triggered to complete the cancellation. At some point during that flow, the agent could also launch a prompt template that summarizes the user's reason for cancelling.

Atomic or Composite

Another factor to consider is whether the reference action is atomic or composite.

- Atomic: A small, singular task. A modular approach gives the agent freedom to combine actions in different ways to accomplish a more sophisticated goal. It also tends to provide more opportunities for action reuse across different topics.
- Composite: A complex task made up of multiple subtasks. The benefit of a composite action is that you control the exact sequence of steps the agent takes to complete a task.

Inputs and Outputs

In Agentforce, each agent action must have at least one input, which means the underlying flow, Apex, or prompt template must also have at least one input. For example, to look up a hotel reservation, the input might be the guest's email or reservation number. During a conversation, the AI agent has the autonomy to gather information and decide if it has all the details required for it to trigger the action and pass in the input.

Each action must also have at least one output. The way you build the action determines what the output is, how it's used, and whether and how it's displayed to users in the conversation. Don't be afraid to experiment with test actions that aren't fully implemented—they can be a great way to see how your ideas work in execution.

After you decide how to build your actions, review the [Best Practices for Agent Action Instructions](#).

See Also

- [Edit a Standard Topic in the Legacy Builder](#)
- [Add a Topic to Your Agent in the Legacy Builder](#)
- [Create a Custom Agent Action in the Legacy Builder](#)
- [Trailhead: Agentforce: Agent Planning](#)
- [Enhance Agent Action UI with Custom Lightning Types](#)
- [Standard Lightning Types](#)
- [Custom Lightning Types](#)

Set Up Your Agent

Before you launch agents, it's important to understand what needs to happen first. Understand key prerequisites, turn on Einstein and Agentforce, and prepare your data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

! **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

[Set Up Einstein Generative AI](#)

Set up Einstein generative AI to get access to powerful generative AI features.

[Enable Agentforce](#)

Turn on Agentforce to start building, customizing, testing, and launching AI agents.

Select Agentforce Model Option

We recommend using the Salesforce Default model option for Agentforce, which enables Salesforce to select the best model mix for agent accuracy and performance. But you can choose an AWS-Hosted model option instead.

Access Agentforce Studio and the New Agentforce Builder

The Agentforce Studio app is the home of the new Agentforce Builder and a central hub for building, testing, and monitoring your agents. By default, Agentforce Studio is available in the App Launcher to all users in orgs with access to Agentforce. Each feature within Agentforce Studio requires its own permissions.

Create an Agent

Create intelligent, trusted, and customizable agents for your customers and employees.

Define Agent-Level Instructions and System Messages

Agent-level instructions provide your agent with guidance on how to interact in all situations, including any rules it should follow. System messages, such as welcome and error messages, are sent when your users begin chatting with an agent and if they encounter system errors.

Update Language Settings

Change the language and tone of your agent's messages to better suit your company's brand.

Versioning and Editing Agents

Learn about the different states of agents as you create and iterate on your agents, including draft and committed states and how to version your agent.

Manage Agent Versions in the Legacy Builder

Create multiple versions of an agent to make and test changes without taking the active version out of production. Or create a version to save as a backup, so you can quickly revert to a previous version. When you create a new version of an agent, Salesforce creates independent copies of the agent's topics, actions, and other assets. Every agent and agent version has its own assets, and assets aren't shared.

Ground Agentforce in Your Data

A great agent uses your data to provide high-quality responses. Identify your data types, and use Agentforce Data Libraries to organize and link your data to agents with the Answer Questions with Knowledge action.

Set Up Einstein Generative AI

Set up Einstein generative AI to get access to powerful generative AI features.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

 **Note** For Tableau users, refer to the instructions in [Turn On Tableau AI for Your Site](#).

Step 1: Verify Data Cloud in Your Org

Before turning on Einstein generative AI features, make sure Data Cloud is provisioned and enabled in your org. Data Cloud is required for essential Einstein Generative AI functionality, such as the Trust Layer.

System admin: Navigate to **Data Cloud Setup**. If you don't see this option, refresh your page, or log out and log back in with your admin user credentials. If you still don't see this option, ensure that you're using a required edition. For more support, contact your Salesforce Account Executive (AE).

For Data Cloud setup instructions, see [Set Up and Maintain](#) in Salesforce Help.

Step 2: Turn On Einstein Generative AI

Turn on Einstein to use generative AI features across Salesforce. After you turn on Einstein, we'll need a few minutes while we sync Einstein and Data Cloud. This step isn't needed for new orgs because the Einstein setting is automatically turned on.

1. System admin: From Setup, in the Quick Find box, enter *Einstein Setup*, and then select **Einstein Setup**.

 **Note** If you can't find **Einstein Setup**, ensure that your org meets the prerequisites for any generative AI features you plan to use. For more support, contact your Salesforce Account Executive (AE).

2. Enable **Turn on Einstein**, if it's not already turned on.

Step 3: Set Up Einstein Trust

Build trust in your generative AI. Use the Einstein Trust Layer to personalize data privacy controls that are integrated into the end-user experience.

System admin: [Set up Einstein Trust Layer](#)

Step 4: Turn On Data Collection for Agentforce and Generative AI Audit and Feedback

Store run-time data in Data 360 for Agentforce Session Tracing Einstein generative AI audit and feedback data. You can use that data for monitoring, compliance, analytics, prompt adjustments, and LLM tuning to enhance your Agentforce applications.

 **Note** Turning on data collection increases your org's credit consumption rate. Consent assumes that you've reviewed and accept any potential cost implications (see [Data Cloud Billable Usage Types](#)).

1. System admin: [Set Up Einstein Generative AI Audit and Feedback](#).

2. System admin: Set Up Agentforce Session Tracing.

Enable Agentforce

Turn on Agentforce to start building, customizing, testing, and launching AI agents.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To enable Agentforce:	Manage AI Agents AND the required permissions for your agent type
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1. If you haven't already, [turn on Einstein Generative AI](#).
2. From Setup, in the Quick Find box, enter *Agent*, and then select **Agentforce Agents**.
If you don't see Agents in Setup, verify that Einstein Generative AI is enabled for your org.
3. To enable Agentforce, turn on the **Agentforce**.

After you enable Agentforce, refresh the page to see the New Agent button. The New Agent button launches the guided setup for creating an agent. If you don't see the New Agent button, after enabling Agentforce, verify that the required permissions are assigned to your profile.

Select Agentforce Model Option

We recommend using the Salesforce Default model option for Agentforce, which enables Salesforce to select the best model mix for agent accuracy and performance. But you can choose an AWS-Hosted model option instead.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

-  **Note** Although Agentforce is limited to a few model options, a custom action that uses a prompt template, Apex, or the Models API can reference any Salesforce-managed or BYO model.

Salesforce Default

The Salesforce Default model option for Agentforce is a managed mix of trusted models optimized by Salesforce for accuracy, trust, and performance.

- Agents created in the new Agentforce Builder use GPT-4.1
- Agents created in the legacy Agentforce Builder use GPT-4o

AWS-Hosted

The AWS-Hosted option uses Anthropic Claude Sonnet 4 on Amazon Bedrock. Because the Salesforce-managed instance of Anthropic is hosted on the Salesforce instance of Amazon Bedrock:

- All LLM traffic remains within the Salesforce virtual private cloud (VPC) enabling a highly secure network architecture.
- The traffic is encrypted using TLS 1.2 at a minimum always.
- The Bedrock instances where Salesforce hosts Anthropic models are connected with AWS PrivateLink.
- Model providers, including Anthropic, can't access the customer's data.
- No customer data is stored within the Amazon Bedrock service.
- No customer data is persisted or used to train any models.

Scope for Model Option Selection

The Atlas reasoning engine uses the selected model option.

For both options, specific tasks, such as topic classification or citations, may use Salesforce-owned models.

Select Your Model Option

To select the model option for Agentforce, from Setup, in the Quick Find box, enter *Audit, Analytics, and Monitoring* and select **Einstein Audit, Analytics, and Monitoring Setup**. Choose an option in the Select the Model for Agentforce section. The model option selection applies to all Agentforce agents.

If you previously created any prompts or custom actions or topics for Agentforce, test them after switching your model option.

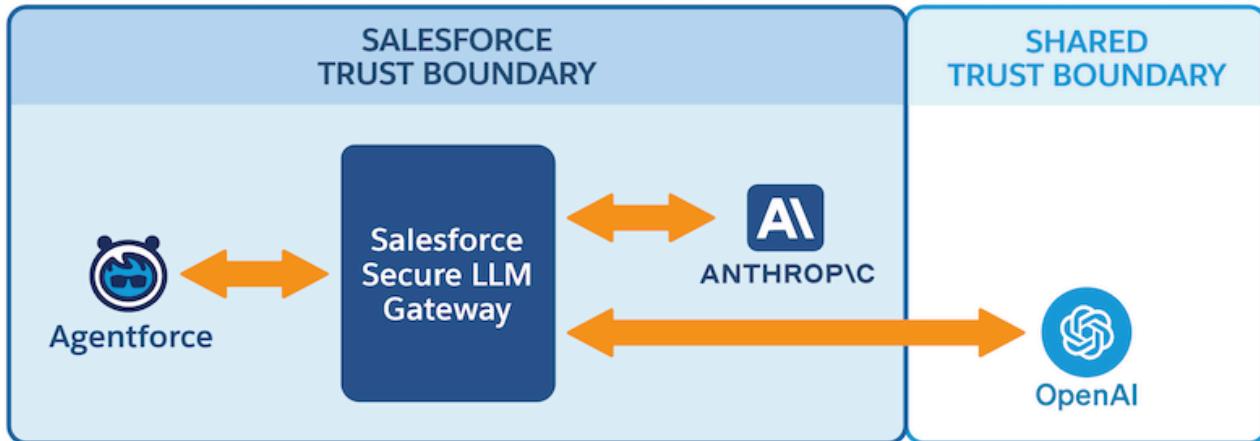
If you choose the AWS-Hosted option, update custom agent actions to use Anthropic Claude Sonnet 4 on Amazon for consistency.

Zero-Data Retention

Your data isn't retained by third-party LLMs. We partner with all our external model providers, such as OpenAI and Anthropic, to enforce the zero-data retention policy.

Salesforce Trust Boundary

The Salesforce-managed instance of Anthropic is the first LLM provider that's fully contained within the Salesforce trust boundary. All LLM traffic remains within the Salesforce VPC enabling a highly secure network architecture.



Limitations for the AWS-Hosted Option

The model performance and latency are better for the Salesforce Default option than the AWS-Hosted option. For benchmark comparisons, see [artificialanalysis.ai](#).

Best Practices for the AWS-Hosted Option

Consider these best practices if you select the AWS-Hosted option.

- If you previously created any custom actions or topics for Agentforce, test them after switching the model option. You may need to adjust some prompts to perform as expected with Anthropic.
- Compared to OpenAI, Anthropic tends to be more sensitive to the nuances in the input payload. Anthropic returns more accurate and reliable responses if the prompts are clear, concise, and thorough.

Use these resources for examples and detailed guidance.

- [Topics in the Legacy Builder](#)
- [Best Practices for Topic Instructions in the Legacy Builder](#)
- [Best Practices for Agent Action Instructions](#)
- [Troubleshooting Agents](#)
- [*The Agentforce Guide: Best Practices for Topics, Instructions, and Actions*](#)
- [Anthropic: Prompt Engineering](#)

Access Agentforce Studio and the New Agentforce Builder

The Agentforce Studio app is the home of the new Agentforce Builder and a central hub for building, testing, and monitoring your agents. By default, Agentforce Studio is available in the App Launcher to all users in orgs with access to Agentforce. Each feature within Agentforce Studio requires its own permissions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

To access the new Agentforce Builder, from the App Launcher, find and select **Agentforce Studio**, and then click **Agents**. All users with access to Agentforce Studio can see the Agents tab. To see the Agents list view and access Agentforce Builder:

- [Einstein must be enabled for the org.](#)
- [Agentforce must be enabled for the org.](#)
- The user must have the Manage AI Agents permission.

 **Tip** Because the new Agentforce Builder lives outside of Setup, you can empower users across your business to build agents without granting admin-level permissions—just assign the Manage AI Agents permission.

To manage user access to the Agentforce Studio app, [manage user profile assignments for the app in Lightning App Builder](#).

Troubleshooting Access to Agentforce Studio

If the Agentforce Studio app isn't visible to you or another user, try these troubleshooting steps.

- [Verify the visibility and settings for the app in Lightning App Builder.](#)
 - App Manager list view: In the row for Agentforce Studio, make sure that the app is visible in Lightning Experience.
 - App Settings | Navigation Items: Make sure that Agentforce Studio is a selected item.
 - App Settings | User Profiles: Make sure that the user's profile is a selected profile.
- From the App Menu page in Setup, verify that the app is visible in the App Launcher. If the app is listed as Hidden in App Launcher, select **Show in App Launcher**.
- Verify the visibility settings for the user's profile. From the Profiles page in Setup, select the user's profile.
 - Custom App Settings: Make sure that Agentforce Studio is visible. (If you're using [the enhanced profile user interface](#), the setting is under Assigned Apps.)
 - Tab Settings: Make sure that Agentforce Studio is Default On. (If you're using [the enhanced profile](#)

[user interface](#), the setting is under Object Settings.)

Explore Agentforce Builder

Agentforce Builder is where you build, customize, and test predictable, context-aware agents. Learn about the intuitive text editor interface, built-in AI assistance, and more.

Explore the Legacy Agentforce Builder

The Legacy Agentforce Builder is a visual workspace for creating, customizing, and managing agents that support both employee and customer use cases. Use the builder to create agents for helpdesk, deal support, or product assistance and define how they communicate and perform actions. The builder provides a unified workspace for streamlined configuration and testing.

Explore Agentforce Builder

Agentforce Builder is where you build, customize, and test predictable, context-aware agents. Learn about the intuitive text editor interface, built-in AI assistance, and more.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

Agentforce Builder improves productivity by helping you build agents that operate within your business rules. The builder offers:

- Guided setup for agent creation
- Customization of your agent's building blocks, including topics, actions, supported languages, and channels
- Tools to preview, test, and troubleshoot agent behavior
- Scalable way to deploy agents across channels

The new builder also includes:

- Built-in assistance: Build your agent with the help of Agentforce embedded right into the user interface. Tell Agentforce what you want your agent to do, and it converts your request into topics, actions, and more. Create, test, troubleshoot, and refine, all with the help of Agentforce.
- Agent Script: Agent Script combines the flexibility of natural language instructions with the reliability of programmatic logic for handling business rules. Use Agent Script to define if-else conditions; set, modify, and compare variables; and chain topics or actions together in sequence.
- Powerful agent previews and testing: Simulate your agent's performance and view a detailed breakdown of the interaction, including which topics and actions the agent used to create its response. Get the details the revamped debugging panel, tracking each moment of the interaction so you can see precisely how the agent spent its time replying.
- Flat navigation: The file explorer and text editor interface gives you an overview of your agent at a glance, so there's less digging and searching for the information you need.

New Agentforce Builder Tour



- Explorer(1): See all the details of your agent, including the topics and their actions, in a single place. Use the Agent Definition section to get an overview of your agent and summary of its capabilities.
- Canvas (2): Use the natural language editor to modify your agent. It includes shortcuts for common tasks, including quick actions for adding logic to your agent, and a picker for resources like topics, actions, and variables.
- Preview (3): Test your agent by inputting utterances. The details of what and why it selected the topics and reasoning show in the canvas.
- Canvas and Script (4): Switch between the natural language-based Canvas and the code-based Script views. Your configuration is consistent across both views.
- Agentforce Assistance (5): Ask Agentforce questions or direct it to help you build and debug your agent.
- Save (6): Save the current draft of your agent.
- Commit Version (7): Compile a version of your agent that you can activate and make available to your customers. You can't modify this version. To make further changes, create a draft of it and modify the draft.
- Settings (8): Edit Agent Details such as the name, role, description, and other configuration settings.

Explorer

Explorer contains all the information about your agent in one place.



- Search (1): A way for you to search for the elements of your agent.
- Settings (2): A section containing various configuration details about your agent.
- Topics (3): A section containing all of your agent's topics. Each topic has its own folder containing metadata, topic configuration, and actions.
- Connections (4): A section containing information on agent connections and channels.
- Variables (5): A list of values that can help you control how your agent performs.

Explore the Legacy Agentforce Builder

The Legacy Agentforce Builder is a visual workspace for creating, customizing, and managing agents that support both employee and customer use cases. Use the builder to create agents for helpdesk, deal support, or product assistance and define how they communicate and perform actions. The builder provides a unified workspace for streamlined configuration and testing.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. [Required add-on licenses vary by agent type.](#)

Agentforce Builder is designed to support both common and custom use cases. With its guided templates, intuitive topic editor, and access to standard and custom actions, Agentforce Builder allows you configure agents that are purpose-built for your organization's needs without writing code.

Agentforce Builder improves productivity by helping you build task-specific agents that operate within your business rules and respond securely with grounded, trustworthy data. The builder offers:

- Guided setup for fast agent creation
- Tools to preview, test, and troubleshoot agent behavior
- Customization options for topics, actions, language, tone, and channels
- A scalable way to deploy agents across teams and use cases

What You Can Do in Agentforce Builder

Design, build, and deploy AI agents in Agentforce Builder to automate customer interactions, resolve inquiries, and scale your support operations efficiently. Here's what you'll do:

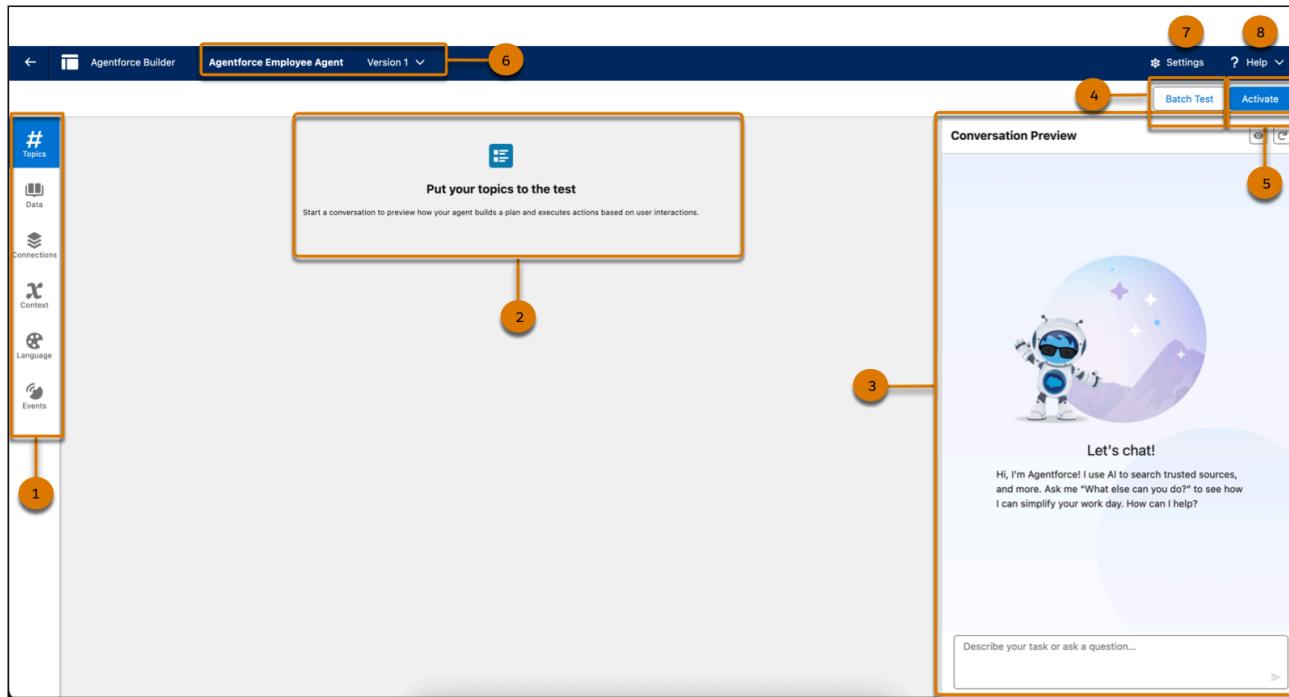
- Create agents from templates or build your own from scratch
- Assign topics to define what the agent can do—like handling helpdesk requests or summarizing accounts
- Connect actions to topics using the Asset Library, including flows, invocable Apex, and Prompt Builder templates
- Customize agent settings such as language, tone, and session context
- Preview conversations using the built-in Conversation Preview or Testing Center
- Review event logs to debug and improve agent behavior
- Control deployment by managing channel availability and access permissions

Launch the Agentforce Builder

To launch the builder, go to Setup, enter Agent in the Quick Find box, and select **Agentforce Agents**. Open an existing agent or create a new one, then click **Open in Builder** to access the Agentforce Builder. When the builder opens, the left navigation sidebar lists all key configuration areas for your agent. For details about each section, see [Navigation Bar](#).

Agentforce Builder Tour

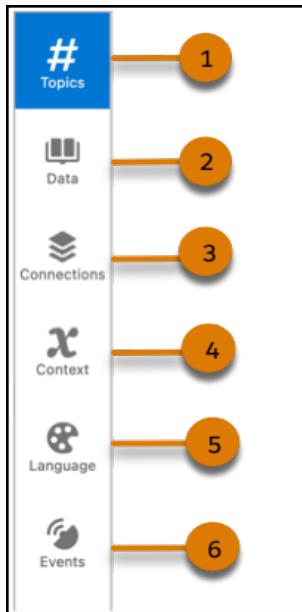
Learn how each panel in the Agentforce Builder supports agent setup, from defining topics and connecting actions to configuring settings and reviewing test results. The Agentforce Builder provides a single workspace for streamlined configuration and testing.



- Navigation Sidebar (1) : Access essential configuration areas to define the jobs an agent can do, the data it can access, the channels it connects to, and the variables and filters that control how it operates securely.
- Plan Canvas (2): Start a test conversation to preview how your agent builds a plan and responds to input. The canvas displays cards such as the selected topic, reasoning panel, prompt used, selected action, input and output, and agent response so that you can view how the agent generated its reply.
- Conversation Preview Panel (3): Simulate real-time user interactions to see how your agent responds to prompts. This panel helps you validate topic behavior, response accuracy, and the overall experience before deploying the agent.
 - Edit Preview Conditions: Click to simulate different user scenarios and test how your agent responds based on specific context values.
 - Refresh: Click to refresh the conversation to test updates from the beginning without starting a new session.
- Batch Test (4): Launch automated testing across multiple topics to verify agent performance at scale. Use this feature to identify issues and ensure consistency across expected interactions. See [Create a Test](#).
- Activate (5): [Activate your agent](#) to make it available to employees or customers. To make changes, your agent must be inactive. When active, the button label changes to Deactivate. See [Activate or Deactivate Your Agent](#).
- Agent Name and Version (6): View the name of the selected agent and switch between available versions. See [Manage Agent Versions](#).
- Settings (7): Edit Agent Details such as the name, role, description, and other configuration settings.
- Help (8): Access comprehensive support by viewing Salesforce Help and Trailhead modules in a new tab for more information.

Navigation Bar

The vertical navigation panel provides quick access to key areas for agent setup—topics, data sources, connections, context variables, language settings, and event logs. Use this panel to move between each configuration step.



- Topics (1): Define what your agent can do by [assigning instructions](#) and grouping related actions under each topic. You can further expand your agent's capabilities by [adding a topic from the asset library](#).
- Data (2): Connect structured data sources that your agent can reference. Begin by [creating a data library](#) and then [assigning a data library to your agent](#).
- Connections (3): Configure channels such as Slack or other APIs to enable your agent to interact with external systems. See [Connecting an Employee Agent to Slack](#).
- Context (4): Define variables to customize how your agent responds for personalized interactions, and apply filters to control its access to specific topics and actions. Learn more about [create a custom variable for your agent](#) and [create a filter to control access to topics and actions](#).
- Language (5): Configure language support and system messages for LLM responses. [Update language settings](#) to refine your agent's communication.
- Events (6): View agent event logs to analyze performance and interactions. [Enable Enhanced Event Logs](#) to include conversation data for deeper insights.

Create an Agent

Create intelligent, trusted, and customizable agents for your customers and employees.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

You can create agents in multiple ways.

To start with an agent for a common business use case, create an agent from a template. A template includes relevant topics and actions, as well as default system messages, variables, and filters. To create an agent from a template, you must have the permissions for the associated agent type, as well as any additional permissions required for the template.

For custom use cases, create an agent with the help of generative AI. Describe the job you want your agent to be able to do. Then Salesforce creates topics based on your description and the actions available to your agent. To create an agent with gen AI, you must have the permissions for the associated agent type.

[Create a Custom Agent with AI Assistance](#)

Use AI assistance to create a custom Agentforce Service agent for your business.

[Create an Agent from an Agentforce Service Agent Template](#)

Agentforce Service agents intelligently support your customers by connecting to messaging and other channels and escalating to reps when necessary. Use the default Agentforce Service Agent template to create an agent designed to resolve common support cases and requests. Or select from more specialized templates to fit your use case.

[Create an Agent from an Agentforce Employee Agent Template](#)

Agentforce Employee agents help employees find information, complete tasks, and access personalized support across channels. Use Agentforce Employee agent templates to build agents that serve specific departmental needs, support role-based access, and scale securely across the organization. Unlike other agent templates, Employee agents are designed for internal employees, run in the logged-in user context, and you can assign each Employee agent to specific profiles or users.

[Create the Agentforce \(Default\) Agent in the Legacy Builder](#)

Help your employees accomplish key business tasks in Salesforce and Slack with the default AI assistant for Salesforce CRM.

[Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#)

Discover the key differences between Agentforce (Default) and Agentforce Employee agent, and learn how to seamlessly migrate your default agents. The migration flow creates a new Employee agent with the same topics and actions, variables and settings as your default agent. You can fine-tune your Agentforce (Default) agent into multiple employee agent personas, each specializing in different use cases, with improved access control and channel integrations.

See Also

[Agent Types and Considerations](#)

[Configure Your Agent](#)

Create a Custom Agent with AI Assistance

Use AI assistance to create a custom Agentforce Service agent for your business.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create a custom agent:	Manage AI Agents AND the required permissions for your agent type
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Before you begin, [set up Einstein Generative AI](#) and [enable Agentforce](#).

Create a Custom Agent

 **Note** Save often when working on your agent.

1. From the App Launcher, find and select *Agentforce Studio*, then click **Agents**.
2. To create an agent, click **New**.
3. Describe what you want your agent to do. Include details like the agent's role and the type of company that it works for, the types of tasks you want it to complete, and any other information critical to its job. Then click **>**.
4. Answer Agentforce's questions to further flesh out your agent. You can also choose to start from scratch and fill in all of the details yourself by clicking **Skip Ahead**. After it has enough information, Agentforce starts off your agent with agent details, system messages, topics, and more.
5. Review the agent settings Agentforce selected for you. Update the name, API name, description, system messages, and languages as needed. These settings help determine how agents behave and present themselves in conversations.
6. Under Agent Details, select or create an **Agent's User Record** for this agent.
To securely access data and perform actions, Service agents operate as an agent user, or a Salesforce integration user with all the permissions that the agent needs to do its job. See [Best Practices for Agent User Permissions](#).
7. Review the topics and actions Agentforce created for you. Click the arrow next to each topic in the Explorer to browse the topic configuration page and actions for that topic. Customize or remove the actions and topics to best suit your needs.
8. Add or create more topics and actions to further personalize your agent. See [Create a Custom Topic](#) and [Create a Custom Action](#) for more details.
9. Click **Preview** to test out your agent and confirm that it performs as expected and meets your security standards. You can simulate your agent's behavior with mock data without risking any changes to your actual data or org. Use trace to dig into the steps the agent performed, and ask Agentforce to help you

understand your agent's behavior at any step. See [Preview and Test in Agentforce Builder](#) for more details.

10. Review and customize the Messaging settings Agentforce selected for you. See [Connect an Agent to Messaging](#) for more information on deploying your agent to a Messaging channel.
11. When you're ready to use your agent outside of the builder, click **Commit Version**. You must commit an agent version before you can activate it. Committed versions can't be edited. To continue making changes after committing, create a new version by clicking **New Draft**. See [Versioning and Editing Agents](#) for more information.
12. When you're ready to make your agent available to your customers, activate it. See [Activate or Deactivate an Agent](#) for more information.

Create a Custom Agent in the Legacy Agentforce Builder

1. From Setup, in the Quick Find box, enter *Agent* and select **Agentforce Agents**.
2. Click **New Agent**.
3. Click **Create with Gen AI**.
4. Describe the job you want the agent to do. Be as specific as you can, as the details help gen AI create a more tailored agent. Click **Next**.
5. Check the name of your agent and the role to make sure they're accurate.
6. Add your company name.
7. Describe your company.
8. Add the agent user and decide whether you want to include conversation data in the event log. Click **Next**.
9. Review the list of topics. If you want to generate another topic, click **Add Draft Topic** and provide the name and description before saving the topic. Click **Next**.
10. Search for and select the data library that you want your agent to reference and add the details.
11. Click **Create**.
12. [Add actions to each of your topics](#).
13. Activate your agent. To make changes later, deactivate the agent.

Create an Agent from an Agentforce Service Agent Template

Agentforce Service agents intelligently support your customers by connecting to messaging and other channels and escalating to reps when necessary. Use the default Agentforce Service Agent template to create an agent designed to resolve common support cases and requests. Or select from more specialized templates to fit your use case.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To build and manage Service Agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

Best Practices for Agent User Permissions

Many AI agents, such as agents that connect to Messaging channels, operate as Salesforce users in your organization. The permissions that you give to these agent users determine the actions that AI agents can take.

Configure Service Agent Managers

When Service agents are enabled for your Salesforce org, Salesforce admins can create and edit service agents. To define other users as Service agent managers so that they can also create and edit service agents, assign those users the Manage Agentforce Service Agents permission set.

See Also

[Trailhead: Quick Start: Build a Service Agent with Agentforce](#)

[Agentforce Workshop: Get Hands On with Service Agents](#)

Create an Agent from a Service Agent Template

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

1. From the App Launcher, enter [Agent](#), and then select the **Agentforce Studio** app.
2. On the Agents tab, click **New Agent**.
3. Select an Agentforce Service agent template. Under Agent Details, select or create an **Agent's User Record** for this agent. To securely access data and perform actions, Service agents operate as an agent user, or a Salesforce integration user with all the permissions that the agent needs to do its job. See [Best Practices for Agent User Permissions](#).
4. Enter the agent's name and then click **Let's Go**.
5. In the Settings section, define the settings that determine how your agent behaves in conversations, such as [system messages](#) and [language settings](#).
6. In the Topics section, manage and customize your agent's [topics](#) and [actions](#).
7. In the Data section, select a data library. The Answer Questions with Knowledge action grounds your agent's responses with it. To create or manage data libraries, see [Setting Up Data Libraries](#).
8. Click Preview to test out your agent and confirm that it performs as expected and meets your security standards. You can simulate your agent's behavior with mock data without risking any changes to your actual data or org. Use trace to dig into the steps the agent performed, and ask Agentforce to help you understand your agent's behavior at any step. See [Preview and Test in Agentforce Builder](#) for more details.
9. Connect your agent to service channels to transfer agent conversations. See [Connect an Agent to Messaging](#) for more information on deploying your agent to a Messaging channel.

10. When you're ready to use your agent outside of the builder, click Commit Version. You must commit an agent version before you can activate it. Committed versions can't be edited. To continue making changes after committing, create a new version by clicking New Version. See [Versioning and Editing Agents](#) for more information.
11. When you're ready, [activate your agent](#).

Create an Agent from a Service Agent Template in the Legacy Agentforce Builder

1. From Setup, in the Quick Find box, enter *Agents*, and then select **Agentforce Agents**.
2. Click **New Agent**.
3. Select **Create from a Template**. Select the template that you want to use to create an agent, and then click **Next**.
4. Review the topics that come with your template. You can customize these topics and actions later, but if any of them don't apply to your use cases, remove them. Then click **Next**.
5. Give your agent a unique name, API name, description, role, and company.
The description field is used by you and others in your org to identify your agent. The role and company fields are used by your agent to help it understand its responsibilities and the company that it represents.
6. Under Agent User, select **New Agent User**. Then click **Next**.
To securely access data and perform actions, Service agents operate as an agent user—a Salesforce integration user with all the permissions that the agent needs to do its job. Creating a new agent user in the guided setup creates an agent user record with minimal access so that your agent is secure by default. Grant the agent the additional access that it needs. See [Best Practices for Agent User Permissions](#).
7. Select **Keep a record of conversations with enhanced event logs to review agent behavior**. See [Enable Enhanced Event Logs](#).
8. Select a data source to ground your agent responses with the Answer Questions with Knowledge action. To continue without selecting any data sources, leave this field blank. You can add and remove data sources later. Then click **Create**.
If you don't want to use any of the available data sources, you can create a library to limit Agentforce Service agents to specific articles or uploaded files. See [Assign a Data Library to Your Agent](#).
9. From the Settings page, define your agent's settings, such as [system messages](#) and [language settings](#). These settings determine how agents behave and present themselves in conversations.
10. Back in the builder, [configure your agent with topics, actions, and other agent assets](#).
11. Test your agent in Agentforce Builder to confirm that your agent performs as expected and [meets your security standards](#).
The service agent operates in the same Agent User context here as it does when deployed in messaging channels, so design-time testing reflects how your service agent behaves when deployed.
12. [Connect your service agent to channels](#) and [configure the escalation topic](#) to transfer agent conversations.
13. When you're ready, [activate your agent](#).

Best Practices for Agent User Permissions

Many AI agents, such as agents that connect to Messaging channels, operate as Salesforce users in your organization. The permissions that you give to these agent users determine the actions that AI agents can take.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

An AI agent can interact with employees or customers. Most agents that interact with employees connect to channels that are restricted to logged-in users, such as Lightning Experience. These agents run in the context of the logged-in user. The Salesforce access controls that you already have in place—such as user licenses, permissions, field-level security, and sharing settings—determine what the agent can access.

Most agents that interact with customers connect to channels that aren't restricted to logged-in users, such as Messaging channels. To securely access data and perform actions that these end user don't have access to, the agent operates as an agent user—a Salesforce integration user with all the permissions that the agent needs to do its job.

You can create an agent user in Agent Creator. We recommend selecting the New Agent User option, which creates an agent user with minimal access so that your agent is secure by default. Grant the agent the additional access that it needs. When deciding what to give your agent access to, follow the principle of least privilege.

Recommended Access for the Agent User

In addition to the access that an agent user has by default, most agent users require:

- A role that lets the agent view or edit the records that it interacts with.
- The minimum level of object permissions for each object that the agent interacts with via flows, Apex, or prompt templates. When you add a new action to your agent, make sure that the agent user has access to the objects referenced in the action.

Review the agent's documentation for additional requirements. If your agent requires access to additional features, such as prompt templates, create a permission set or permission set group that gives the agent user the access it needs. Custom permission sets that you assign to the agent user must be associated with the Einstein Agent license and Einstein Agent User profile.

Feature Your Agent Uses	Required permissions
Prompt templates, including those associated with	Permission Set: Prompt Template User

Feature Your Agent Uses	Required permissions
agent actions	
Flows, including those associated with agent actions	App Permission: Run Flows OR Grant access to individual flows See Limit User Access to Execute Flows
Apex classes, including those associated with agent actions	Apex Class Access: Select the Apex classes that the agent uses. See How Does Apex Class Security Work?
Features and actions that leverage Knowledge and Data 360, such as: <ul style="list-style-type: none"> • Agentforce Data Library • Answer Questions with Knowledge agent action 	App Permission: Allow View Knowledge App Permission: Access Conversation Entries Permission Set: Data Cloud User Data Category Visibility: Select the data categories that include knowledge article data that you want your agent to use in responses. See Data Category Visibility Object Permissions: Following the principle of least privilege, grant access to the Knowledge object.



Example When you create an agent user for an Agentforce Service agent (ASA) in Agent Creator, the user includes these properties by default.

- User License: Einstein Agent
- Profile: Einstein Agent User
- Last Name: EinsteinServiceAgent User
- Permission Set Group: AgentforceServiceAgentUserPsg, which contains the Agentforce Service Agent Secure Base permission set

Most ASAs require additional permissions to access required features and objects.

- [Messaging](#) or [Enhanced Chat](#)
- Read, Create, Edit, Delete, View All Records, Modify All Records, or View All Fields access to Contact, Case, Case Related Issues, and Knowledge objects

- Access to prompt templates, flows, Apex classes, Agentforce Data Library, and the Answer Questions with Knowledge agent action

Agent User Considerations

! **Important** Organization-wide sharing defaults (OWD) determine what access users have to records they don't own. In an agent session with an authenticated user, the session runs in the end user's context and OWD depend on whether the user is external or internal. In an agent session with an unauthenticated user, the session runs in the agent user's context and OWD for internal users apply. Carefully review your OWD, your agent user's permissions, and your agent configuration to ensure the right record access for your end users and your business.

- For all agents that use the agent's user record, we recommend using [filters](#) and [variables](#) to limit record access at the topic and action levels. This strategy protects sensitive data regardless of your OWD.
 - You can [restrict your OWD for internal users](#) to limit record access for all internal users. Then you can [create sharing rules](#) to selectively grant access, excluding the Einstein Agent User where appropriate.
-
- To make sure that your agent has the right access, test the agent in your sandbox before deploying it.
 - Only Salesforce users with admin permissions can view or edit an agent user.
 - You can't log into Salesforce with agent user credentials.
 - As the agent user works in Salesforce, its username can appear in the Created By, Last Modified By, or Owner fields on records or in audit fields in Salesforce.
 - To differentiate between agent users, consider updating the first name of each user to the name of the agent that it's associated with.
 - To easily find all agent users on the Users Setup page, consider creating a list view that filters by the Einstein Agent User profile.

Watch the video: <https://play.vidyard.com/BxzXP38d5kUqwQREMzs4Q>

Configure Service Agent Managers

When Service agents are enabled for your Salesforce org, Salesforce admins can create and edit service agents. To define other users as Service agent managers so that they can also create and edit service agents, assign those users the Manage Agentforce Service Agents permission set.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses](#)

vary by agent type.

USER PERMISSIONS NEEDED

To build and manage Service Agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

1. From Setup, in the Quick Find box, enter and select *Users*.
2. Select the name of the user you want to allow to edit Service Agents, and then scroll down to the Permission Set Assignments and click the **Edit Assignments** button.
3. Enable the **Manage Agentforce Service Agent** permission set.
4. Save your changes.

Create an Agent from an Agentforce Employee Agent Template

Agentforce Employee agents help employees find information, complete tasks, and access personalized support across channels. Use Agentforce Employee agent templates to build agents that serve specific departmental needs, support role-based access, and scale securely across the organization. Unlike other agent templates, Employee agents are designed for internal employees, run in the logged-in user context, and you can assign each Employee agent to specific profiles or users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To build and manage Employee agents:

Manage AI Agents

OR

Customize Application

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

Manage Employee Agent Access

Control user access to specific Agentforce Employee agents with permission sets or profiles. For agents created in the new Agentforce Builder, update permission sets or profiles in Setup. In the legacy

Agentforce Builder, you can also use the Agent Access tab.

See Also

- [Trailhead: Quick Start: Create Employee Agents in Agentforce](#)
- [Agentforce Workshop: Get Hands On with Employee Agents](#)

Create an Agent from an Employee Agent Template

1. From the App Launcher, enter *Agent*, and then select the **Agentforce Studio** app.
2. On the Agents tab, click **New Agent**.
3. Select an Agentforce Employee agent template. Enter the agent's name and then click **Let's Go**.
4. In the Settings section, define the settings that determine how your agent behaves in conversations, such as [system messages](#) and [language settings](#).
5. In the Topics section, manage and customize your agent's [topics](#) and [actions](#).
6. In the Data section, select a data library. The Answer Questions with Knowledge action grounds your agent's responses with it. To create or manage data libraries, see [Setting Up Data Libraries](#).
7. Test your agent and confirm that it performs as expected and meets your security standards on the **Preview** tab. For more details about testing, see [Preview and Test in Agentforce Builder](#).

To give your users access to your agent in Lightning Experience and mobile, see [Manage Employee Agent Access](#).

Optionally, connect your agent to [Enhanced Web Chat v1](#) or [Slack](#).

When you're ready, [activate your agent](#).

Create an Agent from an Employee Agent Template in the Legacy Agentforce Builder

1. From Setup, in the Quick Find box, enter *Agent*, and select **Agentforce Agents**.
2. Click **New Agent**.
3. Select **Create from a Template**, select the template that you want to use, and then click **Next**.
4. Review the agent's topics and actions that come with your template. You can customize these topics and actions later, but if any of them don't apply to your use cases, remove them, and then click **Next**.
5. Define your agent's settings, such as [system messages](#) and [language settings](#). These settings determine how agents behave and present themselves in conversations.
6. Select a data source to ground your agent's responses with the Answer Questions with Knowledge action, and then click **Create**. For more information about data libraries, see [Agentforce Data Library](#)
7. [Configure your agent with topics, actions, and other agent assets](#).
8. Test your agent in Agentforce Builder to confirm that your agent performs as expected and [meets your security standards](#).

To give your users access to your agent in Lightning Experience and mobile, see [Manage Employee Agent Access in the Legacy Agentforce Builder](#).

Optionally, connect your agent to [Enhanced Chat v1](#) or [Slack](#).

When you're ready, [activate your agent](#).

Manage Employee Agent Access

Control user access to specific Agentforce Employee agents with permission sets or profiles. For agents created in the new Agentforce Builder, update permission sets or profiles in Setup. In the legacy Agentforce Builder, you can also use the Agent Access tab.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To build and manage Employee agents:

Manage AI Agents

OR

Customize Application

Manage Employee Agent Access

To give users access to an Agentforce Employee agent created in the new Agentforce Builder, add the agent to a permission set or profile in Setup.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**. Or, enter *Profiles*, and then select **Profiles**.
2. Select a permission set or profile.
3. Edit the Enabled Agent Access settings.
4. Select the Agentforce Employee agents that you want to give users access to and then click **Save**.

Manage Employee Agent Access in the Legacy Agentforce Builder

To give users access to an Agentforce Employee agent in the legacy builder, you can add permission sets or profiles on the Agent Access tab or add agents to a permission set or profile.

1. From Setup, in the Quick Find box, enter *Agents*, and then select **Agentforce Agents**.
2. On the Agentforce Agents Setup page, click the name of your agent to open its Details page.
3. Select the **Agent Access** tab.
The Agent Access tab displays a maximum of 2000 permission sets or profiles. If your environment has more than 2000, not all records are visible or searchable in the list.
4. On the **Permission Sets with Agent Access** or **Profiles with Agent Access** tab, click **Add**.

5. Select permission sets or profiles and then click **Add**.

To remove access to an Agentforce Employee agent, select permission sets or profiles on the Agent Access tab and then click **Remove**.

Create a Voice-Enabled Service Agent in the Legacy Builder

To create a voice-enabled agent, create a new agent, create a telephony connection, and configure voice mode settings.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions, and [Service Cloud Voice add-ons](#).

USER PERMISSIONS NEEDED

To build and manage Service Agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

Before you begin, [Set up Einstein Generative AI](#), [Enable Agentforce](#), and review the considerations in [Agentforce Voice](#).

We recommend creating a dedicated agent for voice and use this agent to deploy to voice connections.

1. From Setup, in the Quick Find box, enter *Agentforce Voice*, and select **Agentforce Voice Setup**.

The Agentforce Voice Setup page walks you through all setup steps for Agentforce Voice.

2. Select either the PSTN or SIP tabs based on the communication protocol that you use to route calls to an Agentforce agent.

You must use one of these communication protocols.

Public Switched Telephone Network (PSTN) phone number

The traditional protocol that transmits calls through copper-wire phone lines.

Session Initiation Protocol (SIP) address

The newer protocol that transmits calls over the internet. The virtual connection makes the calls cost-effective and flexible.

3. In the Create a Voice Enabled Agent step, click **Agent Builder**.

You can also access the Agent Builder from the Agentforce Agents setup page.

 **Note** Although the Agentforce Agents page mentions the new Agentforce Builder (Beta), that builder doesn't support Agentforce Voice yet. Ignore it.

4. Click **New Agent**.
5. Select **Create from a Template**, select the **Agentforce Service Agent** template, and then click **Next**.
6. Review the agent's topics and actions that come with your template. You can customize these topics and actions later, but if any of them don't apply to your use cases, remove them, and then click **Next**.
7. Define your agent's settings, such as [system messages](#) and [language settings](#). These settings determine how agents behave and present themselves in conversations.
Your agent's welcome message is an opportunity to establish customer transparency and trust. When you customize your agent's welcome message, introduce your agent as an AI assistant or AI agent so your users know they aren't chatting with a human. If your agent introduces itself by a human-sounding name, consider pairing it with a title that emphasizes the job, task, or service the agent provides. For example, "Hi, I'm Robbie, an automated returns agent."
8. Under Agent User, select **New Agent User**. Then click **Next**. To securely access data and perform actions, Service agents operate as an agent user—a Salesforce integration user with all the permissions that the agent needs to do its job. Creating a new agent user in the guided setup creates an agent user record with minimal access so that your agent is secure by default. Grant the agent the additional access that it needs. See [Best Practices for Agent User Permissions](#).
9. Select a data source to ground your agent responses with the Answer Questions with Knowledge action. Then click **Create**. If you don't want to use any of the available data sources, you can create a library to limit Agentforce Service agents to specific articles or uploaded fields. See [Assign a Data Library to Your Agent](#).
10. [Configure your agent with topics, actions, and other agent assets](#).
11. Add a [telephony connection](#) to your agent and [select a voice](#) for your agent. This is the step that enables your service agent with voice.
12. When you're ready, activate your agent [Activate or Deactivate Your Agent](#).

You can use voice-enabled agent in your Telephony solution. For more details and instructions, see [Connect a Service Agent to Telephony in the Legacy Builder](#).

Agentforce Voice

Agentforce Voice enables Agentforce Service agents to speak and understand voice conversations with customers. It is designed to understand customer intent from spoken input and take actions to resolve customer queries.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions,

and [Service Cloud Voice add-ons](#).

 **Note** Agentforce Voice is supported only in English.

Agentforce Voice uses multiple models to handle voice interactions.

- The user's spoken words are first converted to text using a speech-to-text model, such as Deepgram.
- The transcribed text is then processed by a Flash Planner, which functions like the Salesforce Atlas reasoning engine. Using an OpenAI GPT large language model (LLM), the most relevant topic and actions are identified to use to respond to the user's query, resulting in a text response.
- Finally, the generated text is converted back to audio using a text-to-speech model and delivered to the user using a text-to-speech model, such as ElevenLabs.

We have built-in instructions and guardrails to help make sure agent responses are clear, easily understood, and follow content safety and security policies. These instructions are integrated into the Flash Planner to manage interactions.

These are a few examples of what the built-in instructions and guardrails accomplish.

- Optimize spoken delivery: Instructions on how agents format spoken replies, such as strategic pauses for clarity when conveying information like addresses. For example, separating numbers from street names.
- Provide concise responses: Guiding agents by word limits to prevent lengthy responses.
- Help ensure content safety: Guardrails to help prevent toxic or offensive language in agent responses and safeguard proprietary information.

Zero Data Retention Policies

Your data isn't retained by third-party LLMs. We partner with all our external model providers, such as OpenAI, to enforce the zero-data retention policy.

- Large Language Models: We partner with all our external large language model (LLM) providers to enforce the zero-data retention policy. For more details on other trust related issues, see [Trust and Agentforce](#).
- Deepgram: We use a dedicated opt-out mechanism that Deepgram provides to make sure data is only retained for the duration necessary to process the request and not utilized for model improvement.
- ElevenLabs: We use ElevenLabs zero retention mode, an enhanced privacy feature to make sure the data from our requests and responses is immediately deleted upon completing the request. The specialized mode restricts the logging of sensitive data points, ensuring they are never sent to a database for long-term storage. ElevenLabs also has agreements with third-party LLM providers that prevent them from training their models on customer data.

Considerations and Limits

Review these considerations and limits before setting up Agentforce Voice.

- Agentforce Voice incorporates a failover strategy to maintain service continuity. Salesforce typically processes customer data within its trust boundary, by deploying speech-to-text, and text-to-speech provided by Deepgram within its trust boundary. If however, certain rate limits are reached, the system is designed to fail over to the provider's infrastructure. In such instances customer data would be processed by the third-party model provider, but would be governed by the zero data retention policies in place. The rate limits are dependent on the region and the availability.
- Each org can have a maximum of 500 concurrent calls with an Agentforce agent, including active and in-queue calls. This limit encompasses all call types (including inbound, outbound, and transfer), active calls with or without transcriptions, and transferred calls that are a continuation of the original call. If this limit is reached, the calls are still handled and routed to the support team, but without real-time transcription. To increase this limit, contact Salesforce Customer Support.
- Salesforce doesn't support recording of customer-agent calls. You can access and listen to call recordings from your partner telephony system, if supported. The recording will not be linked in the voice call record in Salesforce.
- If you are not a Service Cloud Voice customer, Salesforce creates a voice call record for the customer-agent conversation, but not for the customer-rep conversation. If you don't completely set up Service Cloud Voice, you can't create a voice call record for the customer-rep conversation.
- (For SIP only) If you deactivate and then reactivate a SIP Voice messaging channel, there may be a delay of up to 10 minutes before the change takes effect. During this delay, calls can be routed to a service rep, depending on how you configure the inbound call routing.

See Also

[Connect a Service Agent to Telephony in the Legacy Builder](#)

[Video: Set Up a Voice-Enabled Agent in Agentforce](#)

Create the Agentforce (Default) Agent in the Legacy Builder

Help your employees accomplish key business tasks in Salesforce and Slack with the default AI assistant for Salesforce CRM.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To create Agentforce (Default):

Manage AI Agents AND the required permissions for your agent type

OR

Customize Application

! **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

1. From Setup, in the Quick Find box, enter *Audit, Analytics, and Monitoring* and select **Einstein Audit, Analytics, and Monitoring Setup**.
2. Turn on the **Enable the Agentforce (Default) Agent** setting.

The default Agentforce agent is created and appears in the listview on the Agents Setup page. You can only have one Agentforce (Default) agent.

To launch Agentforce (Default) for Lightning Experience and mobile users, [give users access](#) and then [activate your agent](#). To launch Agentforce (Default) on Slack, see [Set Up and Manage Agentforce in Slack](#).

[Give Users Access to Agentforce \(Default\)](#)

Give your employees access to the default Agentforce agent by assigning permissions to users.

Give Users Access to Agentforce (Default)

Give your employees access to the default Agentforce agent by assigning permissions to users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To assign permission sets: [Assign Permission Sets](#)

! **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

To enable permissions for a user:

1. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
2. In the list view, click the user's name to view the user details page.
3. Scroll down to the Permission Set Group Assignments section, and then click **Edit Assignment**.
4. Select the **Access Agentforce Default Agent** permission set group, and then click **Add**.

5. Save your changes.

-  **Note** If the permission set group isn't visible, make sure you're viewing the full list and not the Recently Viewed list.

If you prefer using permission sets to manage user permissions, assign the Access Agentforce Default Agent and Prompt Template User permission sets.

Your agent isn't visible to users until you activate it.

The permissions required for user access to other AI agents varies by agent type. For more details, [see the documentation for the individual agent type](#).

See Also

[Activate or Deactivate Your Agent](#)

Migrate from Agentforce (Default) to Agentforce Employee Agent

Discover the key differences between Agentforce (Default) and Agentforce Employee agent, and learn how to seamlessly migrate your default agents. The migration flow creates a new Employee agent with the same topics and actions, variables and settings as your default agent. You can fine-tune your Agentforce (Default) agent into multiple employee agent personas, each specializing in different use cases, with improved access control and channel integrations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To build and manage Employee agents:

Manage AI Agents

OR

Customize Application

-  **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

What Are the Differences Between Agentforce (Default) and Agentforce Employee Agent?

Compare Agentforce (Default) and Agentforce Employee Agent to understand differences in how agents are created, managed, and deployed. Use this comparison to decide which agent type fits your employee support needs.

Capability	Agentforce (Default)	Agentforce Employee Agent
Agent Creation	Unlike other agent types, Agentforce (Default) is created by turning on the Enable the Agentforce (Default) Agent setting.	Like other agent types, Agentforce Employee agents are created by launching the Agent Creator guided setup and selecting an Agentforce Employee Agent template.
Multi-Agent Support	You can only have one Agentforce (Default) agent per org.	You can have multiple Agentforce Employee agents per org, so you can assist your employees with multiple, more tailored experiences.
Template Support	Agentforce (Default) doesn't support templates.	Agentforce Employee Agent supports templates, so you can quickly create agents for your employee use cases.
User Access	User access to Agentforce (Default) is managed through traditional permission set group assignments.	User access to Agentforce Employee agents is managed with permission sets or profiles, in a convenient new user interface.
Channel Support	Agentforce (Default) can be deployed to Lightning Experience and the Salesforce mobile app.	Agentforce Employee agents can be deployed to Lightning Experience, the Salesforce mobile app, and Slack. You can also connect Employee agents to Messaging for Web on Experience Cloud sites.
Topics & Actions	Agentforce (Default) and Agentforce Employee agents have access to the same topics and actions for employee use cases.	
Language Support	Agentforce (Default) and Agentforce Employee agents support the same languages.	

How to Migrate from Agentforce (Default) to Agentforce Employee Agent

Migrate from Agentforce (Default) to an Agentforce Employee agent in a few steps, with all configurations automatically carried over to the new agent.

To migrate from Agentforce (Default) to Agentforce Employee Agent, you must have the required add-on license and [Flex Credits provisioned](#). Plan to recreate any custom prompts, renamed actions, and visibility settings, such as [permission sets or profiles](#) that determine who can use the agent, in the new agent.

1. From Setup, in the Quick Find box, enter *Agents*, and then select **Agentforce Agents**.
2. From the dropdown menu for Agentforce (Default), select **Migrate to an Employee Agent**.
If you don't see the Migrate to an Employee Agent action, ensure Flex Credits are provisioned. Without Flex Credits, the migration tool isn't available.
3. Enter a name and API name for your Agentforce Employee agent.
4. Click **Create**.
The migration takes a few minutes, after which the new Agentforce Employee agent is ready to use. To use it, [give users access](#) and [activate your agent](#).

Manually Migrate Topics and Actions from Agentforce (Default) to Agentforce Employee Agent

Migrate from Agentforce (Default) to Agentforce Employee Agent to build agents for specific use cases, control access at the agent level, and connect to channels such as Lightning Experience, the Salesforce mobile app, and Slack.

1. [Create an agent from an Agentforce Employee agent template](#).
2. Migrate your agent assets from Agentforce (Default) to your Agentforce Employee agent.
 - a. If you use custom topics or custom versions of standard topics with Agentforce (Default), recreate them for your Agentforce Employee agent. [Create a custom topic](#), or [add a standard topic](#) and [edit it](#). We recommend copying and pasting your existing topic fields, including instructions, into your new agent's topic fields.
 - b. If you use custom actions with Agentforce (Default), [add them to your Agentforce Employee agent](#). Your custom actions are available in the asset library and can be added to a custom topic or a custom version of a standard topic.
 - c. If you use filters with Agentforce (Default), [recreate them](#) for your Agentforce Employee agent.
 - d. If you use custom variables with Agentforce (Default), [recreate them](#) for your Agentforce Employee agent.
3. If you use Agentforce Data Library with Agentforce (Default), [assign your data library to your new Agentforce Employee agent](#).
4. [Give users access to your Agentforce Employee agent](#).
5. [Connect your Agentforce Employee agent to channels](#). Agentforce Employee agents can connect to Lightning Experience, the Salesforce mobile app, Slack, and Messaging for Web.
6. Test your new agent to verify that it behaves as expected. To test individual conversations, start a preview conversation in Agentforce Builder. To test your agent's behavior at scale, use [Agentforce](#)

[Testing Center](#). Learn more about testing and troubleshooting your agent.

- When you're ready, activate your Agentforce Employee agent and deactivate Agentforce (Default).

Define Agent-Level Instructions and System Messages

Agent-level instructions provide your agent with guidance on how to interact in all situations, including any rules it should follow. System messages, such as welcome and error messages, are sent when your users begin chatting with an agent and if they encounter system errors.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To define system messages and language settings: Manage AI Agents AND the required permissions for your agent type

[Bypass the Welcome Message When Handing Off Ongoing Conversations to an Agentforce Service Agent](#)

Configure an Agentforce Service agent to seamlessly pick up an ongoing conversation where it left off instead of sending the system welcome message.

[Manage Conversation Recommendations for Employee Agents](#)

To manage conversation recommendations for an Agentforce Employee agent, use the settings for Conversation Recommendations on the Welcome Screen and Conversation Recommendations in Agent Responses to turn them on or off as needed. Welcome recommendations appear in the Agentforce panel when it opens from most supported record pages or list views. In-conversation recommendations appear during an active conversation in response to user messages. Each type of recommendation is controlled by a separate setting.

See Also

[Transfer Conversations from an Agent with an Omni-Channel Flow](#)

Define Agent-Level Instructions and System Messages

- From the Agents list in the Agentforce Studio app, open the agent you want to update system messages for.
- If there are multiple versions of your agent, from the header in Agentforce Builder, select the agent version you want to edit.
- In the Explorer panel, open **Settings** and click **System**.
- Update the Agent-Level Instructions, Welcome Message and Error Message as needed.
- Save your agent.

Considerations for using Agent-Level Instructions

- Variables are not supported in Agent-Level Instructions.

Considerations for using System Messages

- When you customize your agent's welcome message, introduce your agent as a bot or AI assistant so your users know they aren't chatting with a human. If your agent introduces itself by a human-sounding name, consider pairing it with a title that emphasizes the job, task, or service the agent provides. For example, "Hi, I'm Robbie, an automated returns agent."

! **Important** (Legacy Builder Only) Making sure your users know that they are chatting with an agent is especially important in voice conversations where the agents can sound like a human. We recommend introducing your agent as an AI assistant for your voice-enabled agent.

- You can use your welcome message to ensure your users understand and consent to how their data is stored and used. For example, "By continuing, you agree to our use of your data as outlined in our privacy policy."
- When an ongoing conversation is routed to an Agentforce Service agent, the agent sends the system welcome message and then responds to the customer's previous message. You can [configure the agent to bypass the welcome message](#) and pick up the conversation where it left off.

Define System Messages in the Legacy Builder

Create system messages, such as welcome and error messages that are sent when your users begin using an agent and if they encounter system errors. Only the default Agentforce agent and Agentforce Service Agent have system messages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To define system messages:

Manage AI Agents AND [the required permissions for your agent type](#)

Your agent's welcome message is an opportunity to establish customer transparency and trust.

- When you customize your agent's welcome message, introduce your agent as a bot or AI assistant so your users know they aren't chatting with a human. If your agent introduces itself by a human-sounding name, consider pairing it with a title that emphasizes the job, task, or service the agent provides. For example, "Hi, I'm Robbie, an automated returns agent."

! **Important** Making sure your users know that they are chatting with an agent is especially

important in voice conversations where the agents can sound like a human. We recommend introducing your agent as an AI assistant for your voice-enabled agent.

- You can use your welcome message to ensure your users understand and consent to how their data is stored and used. For example, “By continuing, you agree to our use of your data as outlined in our privacy policy.”

1. From Setup, in the Quick Find box, enter *Agent*, and then select **Agentforce Agents**.
2. Click the name of your agent.
3. Click the **System Messages** tab. There’s an 800 character limit on welcome messages.
4. Enter the text you want the system to show to users. We provide default messages, but use whatever works best for your company.
5. Save your changes.

When an ongoing conversation is routed to an Agentforce Service agent, the agent sends the system welcome message and then responds to the customer’s previous message. You can [configure the agent to bypass the welcome message](#) and pick up the conversation where it left off.

Bypass the Welcome Message When Handing Off Ongoing Conversations to an Agentforce Service Agent

Configure an Agentforce Service agent to seamlessly pick up an ongoing conversation where it left off instead of sending the system welcome message.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

When an ongoing conversation is routed to an Agentforce Service agent, the agent sends the system welcome message and then responds to the customer’s previous message. When a conversation is initiated on a Messaging channel, including Enhanced Chat, the agent sends the system welcome message, waits for the customer to send a message, and then generates a response based on the latest message and the context of the prior conversation.

You can configure the agent to bypass the system welcome message and respond directly to the customer’s previous message instead. Simply leave [the Welcome Message field](#) blank.

- When no welcome message is specified and a messaging session with previous conversation history is routed to the agent, the agent processes and responds to the customer’s most recent message. If the conversation is transferred to the agent from a service rep or bot, the agent waits for the customer to send a new message before responding. The agent then generates a response based on the latest message and the context of the prior conversation.
- When no welcome message is specified and a messaging session with no conversation history is

started, the agent waits for the customer to send an initial message and then generates a response based on the intent of the customer's initial message. Use topic instructions to refine how the agent responds, based on the use cases your agent is designed to handle.

If you don't specify a system welcome message, it's still important to disclose that an AI agent has joined the conversation so your customer knows that they're not chatting with a human. We recommend configuring an auto-response at the start of the agent conversation, such as a Conversation Acknowledgment. See [Customize Auto-Responses in Service Cloud Messaging Channels](#).

Manage Conversation Recommendations for Employee Agents

To manage conversation recommendations for an Agentforce Employee agent, use the settings for Conversation Recommendations on the Welcome Screen and Conversation Recommendations in Agent Responses to turn them on or off as needed. Welcome recommendations appear in the Agentforce panel when it opens from most supported record pages or list views. In-conversation recommendations appear during an active conversation in response to user messages. Each type of recommendation is controlled by a separate setting.

REQUIRED EDITIONS

-  **Note** Welcome recommendations and conversation recommendations are controlled by separate settings. Turning off one setting doesn't affect the other. For example, welcome recommendations can still appear if conversation recommendations are turned off, and conversation recommendations can still appear if welcome recommendations are turned off.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To build and manage Employee agents:

Manage AI Agents

OR

Customize Application

-
1. From Setup, in the Quick Find box, enter *Agents*, and then select **Agentforce Agents**.
 2. On the Agentforce Agents Setup page, click the name of your agent to open its Details page.
 3. From the Agent Details page, select the **System Messages** tab, and then turn on or off **Conversation Recommendations on the Welcome Screen**.
You can use this option to control welcome recommendations that appear when the agent panel opens.
 4. From the Agent Details page, select or clear **Conversation Recommendations in Agent Responses**.
You can use this option to control in-conversation recommendations that appear during a

conversation.

5. Save your changes.

To personalize the start of agent conversations, administrators can configure welcome recommendations that appear on the Agentforce panel welcome screen. These recommendations guide employees toward the most relevant or frequently used actions. See [Customize Welcome Recommendations for Agentforce Employee Agents in Agentforce Builder](#).

Customize Welcome Recommendations for Agentforce Employee Agents in Agentforce Builder

To customize welcome recommendations for Agentforce Employee agents in Agentforce Builder, administrators must add a minimum of three and up to twenty recommendations, each between 5 and 50 characters. After the agent is activated, the configured recommendations appear on the welcome screen when the Agentforce panel opens. Users can then select a recommendation to begin a conversation.

Customize Welcome Recommendations for Agentforce Employee Agents in Agentforce Builder

To customize welcome recommendations for Agentforce Employee agents in Agentforce Builder, administrators must add a minimum of three and up to twenty recommendations, each between 5 and 50 characters. After the agent is activated, the configured recommendations appear on the welcome screen when the Agentforce panel opens. Users can then select a recommendation to begin a conversation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To build and manage Employee agents:

Manage AI Agents

OR

Customize Application

Before you begin, enable Conversation Recommendations on the Welcome Screen to set up welcome recommendations. If this setting is turned off later, your customized recommendations are saved but appear deactivated. They become available again if the setting is turned back on.

1. From Setup, in the Quick Find box, enter *Agent*, and select **Agentforce Agents**.
2. Click the name of the Agentforce Employee agent you want to customize welcome recommendations for.
3. If your agent is active, [deactivate it](#).

4. From the Agent Details page, select the **System Messages** tab.
5. Select **Create Your Own** and add your welcome recommendations. You must add at least three and up to twenty recommendations, with each recommendation containing 5–50 characters. Up to three recommendations are displayed on the welcome screen at a time, even if more than three were configured. The order of prompts in the list determines priority, but the actual recommendations shown depend on the page context.
6. Save your changes.

Update Language Settings

Change the language and tone of your agent's messages to better suit your company's brand.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To define language settings:

Manage AI Agents AND the required permissions for your agent type

See Also

[Use Additional Languages in Enhanced Chat Conversations](#)

[Considerations for Agentforce Service Agent](#)

[Agentforce \(Default\) Considerations](#)

[Agentforce Considerations](#)

Update Language Settings

Choose what languages your agent allows. Language settings define the language of your agent's conversational responses.

1. From the Agents list in the Agentforce Studio app, open the agent you want to add or edit language support for.
2. If there are multiple versions of your agent, from the header in Agentforce Builder, select the agent version you want to edit.
3. In the Explorer panel, open **Settings** and click **Languages**.
4. Select a **Default Language** for your agent.
5. To add languages in the Allowed Languages section, select a language you want to add, then click the right arrow to move it to the **Allowed Languages** column.
6. Save your agent.

Update Language Settings in the Legacy Builder

Change the language and tone of your agent's messages to better suit your company's brand.

Tone is how an agent expresses your brand personality in messages through things like word choice, punctuation, and sentence structure. You have three tone options.

- Formal: polished and professional
- Neutral: unbiased and nonevaluative
- Casual: relaxed and informal

If your company tone is more formal, such as used in a financial institution, you can set the language to reply in a formal tone. Conversely, if your company tone is informal, like used in a gaming company, use the casual tone and better match the overall feel of your company.

See [considerations documentation for your agent type](#) for supported languages and locales and related considerations, as well as [considerations for language support for Agentforce overall](#).

1. From Setup, in the Quick Find box, enter *Agent*, and then select **Agentforce Agents**.
2. Click the name of your agent. Then click **Open in Builder**.
3. Click the **Language Settings** tab. Select a tone for your agent. By default, your agent's tone is casual. If your agent supports multiple languages, you can specify a default language and select more languages.
4. To apply your changes, restart your preview conversation. This step also allows you check to see if the tone is right for your company.

To use multiple languages with Agentforce Service agents, connect your agent to an Enhanced Chat channel and [follow these additional steps](#).

Versioning and Editing Agents

Learn about the different states of agents as you create and iterate on your agents, including draft and committed states and how to version your agent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

1. Create an agent

When you create a new agent or a new agent version, you create an editable draft of your agent.

2. Modify your agent and test your changes

As you build your agent, you make changes and save them as you go. Every time you save your changes, you're saving changes to the current agent version, and you can continue editing it.

At this point, your agent is in a draft state. You're in the process of making lots of changes or one or more major changes, so you want to be able to make and test your changes quickly.

In the Preview panel, simulate your agent's behavior with mock data or live test your agent's behavior with real data in your org. Previewing your agent gives you a detailed, step-by-step trace of your agent's interactions and processes. You can also dive deeper with detailed tracing and debugging, so you can make informed, precise fixes.

When your agent is in a draft state, you can't activate it.

3. Commit and activate your agent

When you're satisfied with your agent's design and performance, it's time to commit your agent. Then when you're ready, [activate your agent](#) for your customers or employees.

If you're familiar with Git, committing an agent version is similar to committing a change. Committing an agent version saves a snapshot of your agent version to metadata. This makes it available to activate.

After you commit an agent version, you can no longer make changes to that agent version.

4. Create a draft to version your agent and continue editing

To iterate on your agent after you've committed a version, [create a draft](#). Creating a draft creates a new, editable version of your agent. Your draft can be edited until you commit it.

As you iterate on an agent, it's common to create many agent versions. In Agentforce Builder, you can switch between versions from the dropdown menu in the header.

[Commit an Agent Version](#)

Commit an agent version to save a snapshot of your agent and prepare your agent for use outside of Agentforce Builder. Your agent version must be committed to activate it.

[Create a Draft of an Agent](#)

Create multiple versions of an agent to seamlessly iterate on your agent's design. Create a draft from a committed agent version so you can continue making changes based on testing or to save as a backup, so you can quickly revert to a previous version.

[Delete an Agent or Agent Version](#)

Delete an agent or agent version to remove it entirely from Agentforce Builder. You can't recover the agent after its deleted.

Commit an Agent Version

Commit an agent version to save a snapshot of your agent and prepare your agent for use outside of Agentforce Builder. Your agent version must be committed to activate it.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To commit an agent version:

Manage AI Agents AND the required permissions for your agent type

1. From the Agents page of the Agentforce Studio App, create a new agent or open an existing agent version.
2. If there are multiple versions of your agent, from the header in Agentforce Builder, select the agent version you want to commit.
3. Modify your agent, saving your changes as you go.
4. When you're ready to commit your agent version, click **Commit Version**.

After you've committed your agent version, you can no longer make changes to it. The agent version is saved to metadata in your org, and you can [activate it](#) for your customers or employees.

To make changes to an agent version after you've committed it, [create a new draft](#).

Create a Draft of an Agent

Create multiple versions of an agent to seamlessly iterate on your agent's design. Create a draft from a committed agent version so you can continue making changes based on testing or to save as a backup, so you can quickly revert to a previous version.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create an agent draft:

Manage AI Agents AND the required permissions for your agent type

You can only create a draft from a committed agent version. When you create a draft, the new version is editable until you commit it. Only one version of an agent can be active at a time.

When you create a draft from a committed agent version, its assets are cloned so that every agent and agent version has its own assets. These assets include:

- System messages
- Topics, including standard topics, custom topics, and customizations you've made to standard topics
- Actions, including standard agent actions, custom agent actions, and customizations you've made to standard agent actions
- Variables, output mappings, and input assignments

Versioning of topics and actions isn't supported. Changes you make to a custom topic or action apply to only the agent and version to which they're assigned.

1. From the Agents page of the Agentforce Studio app, open the agent you want to use to create a draft.
2. If there are multiple versions of your agent, from the header in Agentforce Builder, select the agent version you want to create a draft from.
3. Click **New Draft**.

If you don't see the New Draft button, your agent version is in a draft state. To create a new draft, [commit the current agent version](#), and then create a draft. Keep in mind that when you commit an agent version, you can no longer make changes to it, but you can edit the new version you create from it.

Your draft version opens in Agentforce Builder. The new version inherits the name of the agent you created it from and is appended with the next sequential number (for example, if you clone My Agent - 3, your new version is named My Agent - 4).

Delete an Agent or Agent Version

Delete an agent or agent version to remove it entirely from Agentforce Builder. You can't recover the agent after its deleted.

Delete an Agent Version

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To create an agent:

Manage AI Agents AND the required permissions
[for your agent type](#)

1. From the App Launcher, find and select **Agentforce Studio**, then click **Agents**.
2. From the Agents page of the Agentforce Studio app, open the agent whose version you want to delete.
3. From the header in Agentforce Builder, select the agent version you want to delete.
4. Next to the **Activate** or **Commit Version** button, select the dropdown arrow and click **Delete Version**. If there's only one version, the entire agent is deleted.

Active agents or agent versions can't be deleted. Deactivate your agent or agent version before deleting it.

Delete an Entire Agent

1. From the App Launcher, find and select **Agentforce Studio**, then click **Agents**.
2. In the All Agents list on the Agents page, find the row for the agent you want to delete. Open the dropdown menu and select **Delete Agent**. After an agent or agent version is deleted, it can't be recovered.

Agents from the legacy may appear in the agents list with the **Delete** button disabled. Legacy agents must be deleted from the legacy builder.

Manage Agent Versions in the Legacy Builder

Create multiple versions of an agent to make and test changes without taking the active version out of production. Or create a version to save as a backup, so you can quickly revert to a previous version. When you create a new version of an agent, Salesforce creates independent copies of the agent's topics, actions, and other assets. Every agent and agent version has its own assets, and assets aren't shared.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To manage versions of AI agents:

Manage AI Agents AND the required permissions
[for your agent type](#)

You can create up to 20 versions of an agent. Only one version of an agent can be active at a time. If you've reached the limit, delete older versions before cloning new ones.

If cloning fails, check that you're not at the 20-version limit, that you've saved all changes, and that you have the correct permissions.

When you clone a version of an agent, its assets are also cloned, so that every agent and agent version has its own assets. These assets include:

- [System messages](#)
- Topics, including standard topics and [customizations you've made to standard topics](#)
- Actions, including [standard actions](#) and [custom agent actions](#)
- [Filters](#)
- [Custom variables, output mappings, and input assignments](#)

Versioning of standard and custom topics and actions isn't currently supported. Changes you make to a custom topic or action apply to only the agent and version to which they're assigned.

Each new agent version, including the agent version's assets, is an independent copy of the version you cloned.

1. From the Agentforce Agents Setup page, in the list of agents, expand the agent row to see its versions. Click the dropdown for the agent you want to clone or delete.
2. To create an agent version, from the right dropdown for the version you want to duplicate, select **Clone Version**. To delete an agent version, select **Delete**.

You can quickly switch between agent versions in Agentforce Builder and on the Details page for your agent.

See Also

[Video: Use Versions to Deploy Agentforce Agents with Zero Downtime](#)

Ground Agentforce in Your Data

A great agent uses your data to provide high-quality responses. Identify your data types, and use Agentforce Data Libraries to organize and link your data to agents with the Answer Questions with Knowledge action.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

[Agentforce Data Library](#)

Improve accuracy, add personalization, and build trust in gen AI responses when you assign data libraries to your Agentforce features. Agentforce Data Library uses grounding to index your knowledge articles and fields, your file uploads, or web sources, so that AI agents know which information to base responses on. With this index, AI agents can ensure the accuracy of LLM responses against your organization's information so that you get the best results.

[Retrieval Augmented Generation](#)

Use Retrieval Augmented Generation (RAG) in Data 360 to improve large language model (LLM) responses for agents and users. RAG is a framework for grounding prompts with relevant, accurate knowledge from unstructured data sources.

See Also

[Trailhead: Grounding an Agent with Data](#)

Agentforce Data Library

Improve accuracy, add personalization, and build trust in gen AI responses when you assign data libraries to your Agentforce features. Agentforce Data Library uses grounding to index your knowledge articles and fields, your file uploads, or web sources, so that AI agents know which information to base responses on. With this index, AI agents can ensure the accuracy of LLM responses against your organization's information so that you get the best results.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

To use Agentforce Data Libraries, you must have [Data 360 set up](#). Data libraries consume Data 360 credits.

Agentforce Data Library doesn't support companion orgs through Data Cloud One.

	Dive deeper into Salesforce Help. <ul style="list-style-type: none">• What Are Data Libraries?• Using Retrieval Augmented Generation
	Use Trailhead to build and test your skills. <ul style="list-style-type: none">• Agentforce Data Library Basics• Retrieval Augmented Generation: Quick Look
	Get started with data library setup. <ul style="list-style-type: none">• Setting Up Data Libraries
	Integrate data libraries with AI agents. <ul style="list-style-type: none">• Assign a Data Library to Your Agent• Answer Questions with Knowledge

	<ul style="list-style-type: none">• Customize the Knowledge Action prompt template in Prompt Builder
	<p>Explore all data library enabled features.</p> <ul style="list-style-type: none">• Agentforce Agents• Einstein Service Replies for Chat

Learn About Data Libraries

Understand how data libraries work and learn best practices for managing your content to use with generative AI.

Start learning about data libraries.

What Are Data Libraries?

Agentforce Data Libraries enhance the accuracy of AI features like Agentforce Agents by connecting them to your trusted data sources. Data libraries use unstructured or semi-structured data so that they can take large sets of information that exist on the web, in documents, or as large text inputs in fields, and turn that into more useful, searchable information.

Prepare Your Source Content

Get the most out of your source content by preparing it so that it's ready for AI and human consumption. Discover best practices for structuring your content, tailoring to your audience, adding important details, and maintaining accuracy over time.

What Are Data Libraries?

Agentforce Data Libraries enhance the accuracy of AI features like Agentforce Agents by connecting them to your trusted data sources. Data libraries use unstructured or semi-structured data so that they can take large sets of information that exist on the web, in documents, or as large text inputs in fields, and turn that into more useful, searchable information.

When you create a data library it automates several configuration steps across Data 360 and Prompt Builder, such as pushing data streams to Data 360, mapping data objects, and creating a search index and retriever. With these steps completed automatically, it's easy to link agents to your data. You can create and configure libraries from the Agentforce Data Library setup or through Agentforce Builder.

Grounding, Chunking, and Indexing

Grounding adds domain-specific knowledge or customer information to the prompt, giving the LLM context to respond more accurately to a question or task. Grounding sources can include knowledge articles, uploaded files, or conversation transcripts. Lengthy and complicated knowledge articles and uploaded files can take a significant amount of time and processing power to search through for the

right information, and LLMs have a maximum token or word limit for the amount of text it can process in a single call. To make the search more efficient, improve relevance, and handle very large datasets, we break down data sources into smaller parts called chunks. Many types of data can be chunked, including text, images, and even audio files.

After data is split into chunks, it's indexed, or organized and categorized. Indexing simplifies the search and retrieval of data chunks for AI tools. When an AI agent needs information or a user asks a question, instead of searching through an entire document, we use the search index to sort through the chunks and find the ones that are most relevant to a particular query or task. Each chunk in the search index is compared to a similarity score that indicates how much of the text between the query and chunk matches. Chunks with high similarity scores point to relevant articles or sources, which are then returned and added into the prompt. By using this strategy, we can add relevant, context-specific information into a prompt without overwhelming the token limit, and the LLM can draft responses that fit different situations and organizations.

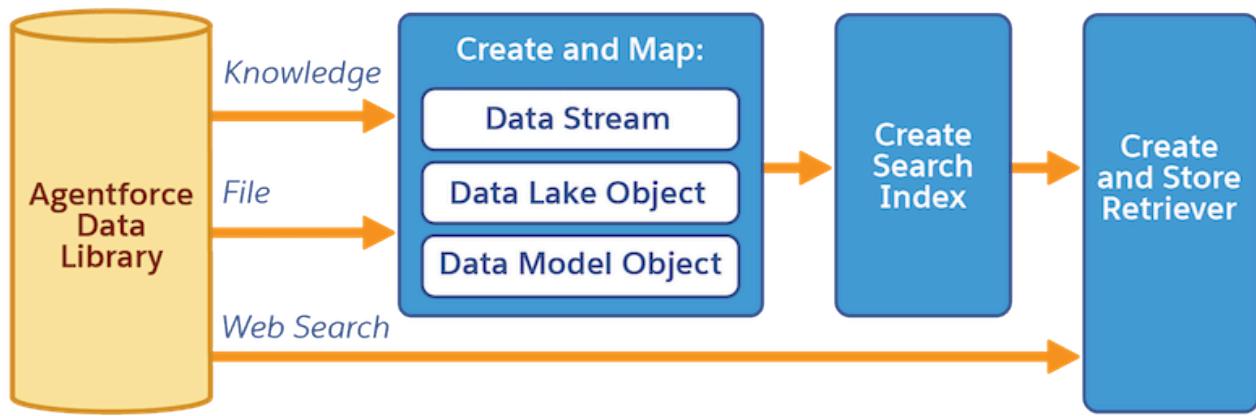
Retrievers

Retrievers act like pointers between data and features. They're designed to automatically extract and proffer relevant data from different databases, systems, or platforms, cutting down on manual data collection and, at the same time, standardizing the retrieved datasets. Retrievers are particularly important in applications like search engines, question-answering systems, and recommendation systems. When a user asks a question or gets help from AI, the retriever that you assign to each Data Library determines which datasets in Data 360 are available to AI tools in Salesforce. See [Using Retrieval Augmented Generation](#).

What Happens when you create a data library?

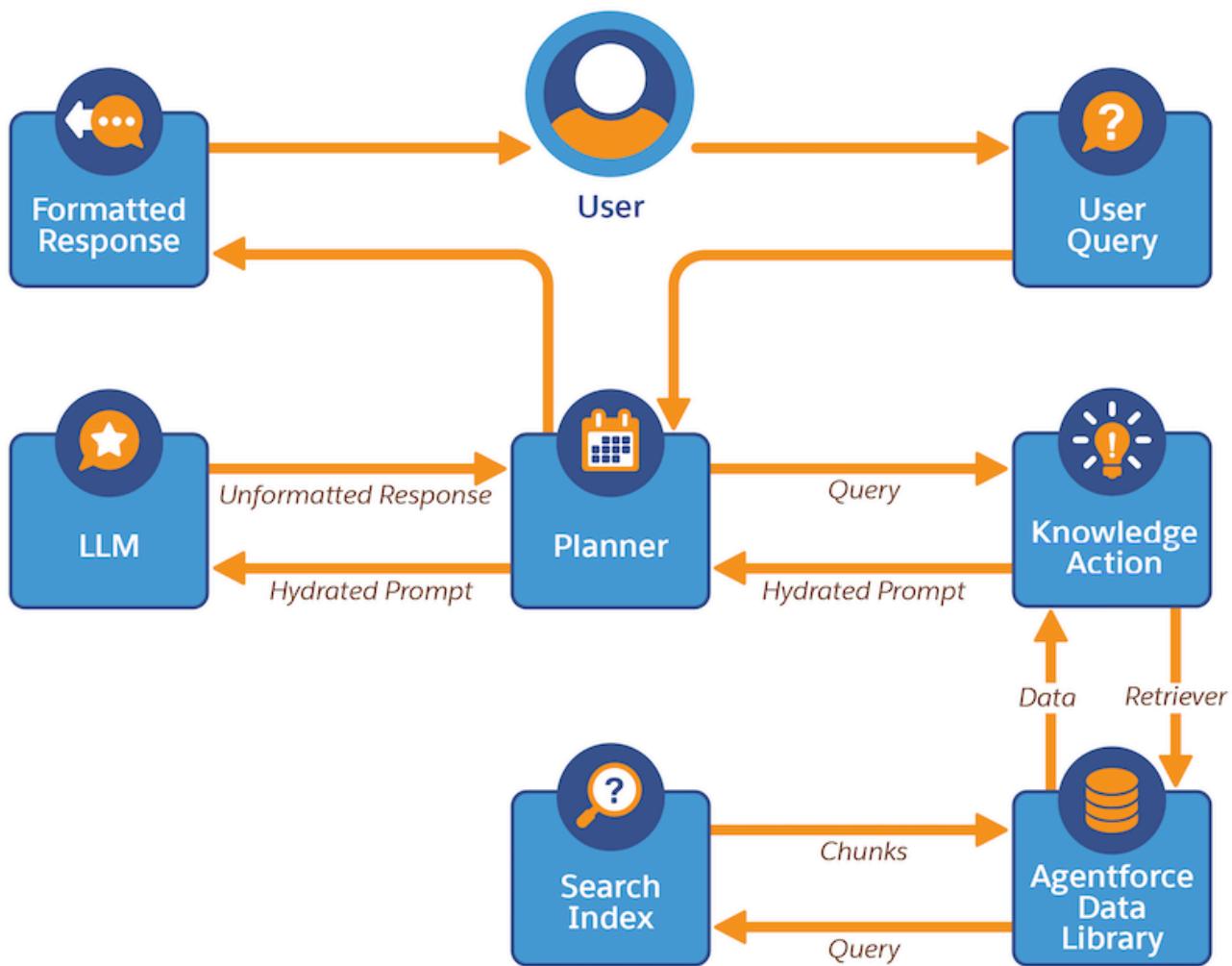
The processes that connect your data with your AI agents and features kick off as soon as you configure and save your data library. First, a data stream is created, followed by the data lake and data model objects. Then the data lake object is mapped with the data model object. After the data lake and model objects are mapped, the search index is created. For the search index to be created, the previous steps must be successful and active.

After you create a search index, data chunking begins. Chunking time depends on factors like the number, size, and complexity of knowledge articles or uploaded files, and the number of knowledge fields selected for chunking. Web search based data libraries don't create a search index, just a retriever. For file or knowledge based libraries, after chunking is completed and the search index is ready, then the retriever is created. Each Agentforce Data Library has its own retriever regardless of the settings. Retrievers can point to the same search index, but each pointer is unique.



When the index is ready and the retriever is created, customers can use the data library configuration with their AI agents and features.

How do data libraries work at runtime?



At runtime, the user's query is added into the prompt template, which references a retriever that

connects to relevant data. The system then combs through the search index to find the most pertinent information and incorporates it back into the prompt. The LLM receives this enriched prompt and takes the user's query, the added information, and the prompt instructions to generate a response. The Service Planner then reviews this response to ensure that it aligns with the prompt instructions. Finally, the end user receives a response that answers the query contextualized with relevant, domain-specific information and tailored to the specific task.

Agent Actions and Data Libraries

Actions determine the jobs that an agent can do. Standard actions are included by default with your agents and can be built to work with specific products. For example, when a user asks an AI agent a question, the Answer Questions with Knowledge agent action is used to answer the query based on data in the corresponding Agentforce Data Library. See [Assign a Data Library to Your Agent](#) and [Agent Action: Answer Questions with Knowledge](#).

Prepare Your Source Content

Get the most out of your source content by preparing it so that it's ready for AI and human consumption. Discover best practices for structuring your content, tailoring to your audience, adding important details, and maintaining accuracy over time.

High-performing AI systems aren't built on raw documentation, but on structured, governed, knowledge assets.

Knowledge-Centered Service

Knowledge-Centered Service (KCS) is a set of industry-standard best practices for knowledge management. They help you create accurate and consistent articles, which in turn improves knowledge grounding. We list some key practices here, but you can learn more at the [Consortium for Service Innovation](#).

There are four key pillars to prepare your content for use with AI models via data libraries. You want your content to be specific, organized, detailed, and accurate. Consider how to apply these best practices to your use case. That way, you can create a more effective knowledge base that amplifies the strengths of generative AI.

Specific

- **Consider the audience of each article.** Customers prefer short, solution-focused answers, while service representatives or developers need more technical depth. Adjust the tone, structure, and level of detail to match the identified audience's needs.
- **Segment content into articles that focus on isolated topics.** AI systems retrieve information in fragments, so articles that combine loosely related topics reduce coherence, dilute embeddings, and increase the risk of the model combining mismatched ideas. Ensure that each article resolves a clearly

- defined user intent, and avoid addressing multiple unrelated or partially related topics in a single piece.
- **Research and choose article topics strategically.** If you're unsure what topics to cover, start by identifying the typical scenarios, questions, and problems your users face. This research ensures each article addresses real user needs, without unrelated or unnecessary information.
 - **Choose clear, standard terms for key concepts and stick with them.** Define abbreviations and mark outdated terms as deprecated. Consistent terminology helps AI agents correctly link related concepts across articles and avoid generating responses that mix up ideas or misinterpret terms.

Organized

- **Use a clear structural hierarchy.** Like people, AI systems understand content more successfully when it's logically structured. Use heading tags (H1–H6) to reflect the informational hierarchy with paragraphs, lists, and headings to signal conceptual boundaries and relationships. Clear information architecture, and sections that group semantically related ideas, improves overall chunking, parsing, and vectorization for AI consumption.
- **Spread out long-form content across fields.** Don't store large bodies of information in a single text field. Break up content into meaningful fields that correspond to parts of the text, such as Question, Description, Resolution, and Exceptions. Explicit boundaries help to build a more precise search index and supports accurate retrieval.
- **Separate content by audience using both pre-retrieval and run-time enforcement.** The information intended for customers, service representatives, and developers should differ in depth, tone, and sensitivity. To prevent exposure errors and improve AI content retrieval:
 - For pre-retrieval separation, create dedicated fields or articles for each audience. Explicitly indicating a target audience helps agents minimize cross-audience ambiguity.
 - For run-time filtering, use access-tier metadata to ensure that agents retrieve only the content that's appropriate for the user querying the system or the use case at hand.
- **Use metadata to boost content retrieval.** In RAG systems, queries retrieve relevant content segments before the model generates a final response. Metadata, like product tags, target audience, versioning, and access tiers, enables accurate filtering, ranking, and compliance, improving retrieval precision and ensuring agent responses are well-grounded.

Detailed

- **Provide thorough, comprehensive information.** Generative AI performs best with detailed, comprehensive information that it can synthesize and deploy at multiple levels of detail. Prioritize clear, complete explanations over word count, especially for technical content. Detail isn't about length but explanatory sufficiency.
- **Define the context, conditions, and assumptions for each step.** Include version applicability, environmental variables, exception handling, and clarify the reasoning behind each step. Without this, models may fill gaps with plausible but incorrect information (i.e. hallucinations).
- **Include real-world scenarios to enrich contextual grounding.** Describe examples in detail, and include best practices or considerations for common use cases. Likewise, describe common user mistakes or high-frequency escalation paths so AI systems can respond with nuance rather than

generic summaries.

- **Annotate visual content like images, videos, and screenshots with clear alt-text and descriptive captions.** While visuals are easy for people to understand, AI systems rely on structured descriptions to interpret and use that context correctly. If visuals are important to your knowledge base, use a parser built for image or multimodal processing. Agentforce Data Library detects your content modes and applies the most appropriate parser for you. Even so, adding specific details like objects, visible text, layout, colors, relationships, and overall context helps improve accuracy, searchability, and consistency across systems.

Accurate

- **Check facts and existing articles before publishing.** Make sure instructions, policies, and technical steps match an official source. Or build a subject matter expert (SME) review into your publishing workflow. If the information is wrong in the knowledge base, agents may repeat it confidently. And, if related articles say different things, you may get blended or internally inconsistent answers. While fact checking a new article, review related content for alignment or redundancy. Conflicting or redundant information creates content noise and confuses LLMs.
- **Test agent behavior and knowledge retrieval before and after deployment.** Before going live, test your agent in a low-stakes environment to confirm it retrieves and applies knowledge correctly. Tools like the [Retriever Playground](#) and [Agentforce Testing Center](#) enable you to generate test cases from the agent's connected knowledge sources to evaluate grounding and response quality. After deployment, monitor ongoing retrieval quality by using [Knowledge/RAG Quality Data and Metrics](#).
- **Update content when systems change and clearly mark new versions.** When products, policies, or regulations change, review the related knowledge immediately. Or build content updates into your development cycle. Accuracy requires ongoing updates, not one-time reviews. State which versions, dates, or conditions apply. Mark outdated processes so an agent doesn't present old guidance as current.
- **Use AI output and user feedback as a quality signal.** Monitor how your agents perform in real sessions to identify outdated, incomplete, or misapplied guidance. Tools like [Knowledge/RAG Quality Data and Metrics](#), [Agent Optimization](#), and [Agent Analytics](#) enable you to inspect sessions, track every interaction, and analyze trends. Patterns in agent behavior, user corrections, or escalations can reveal hidden gaps in your knowledge base that can be addressed to improve accuracy and alignment.

Setting Up Data Libraries

Use Agentforce Data Library to configure the Knowledge Action and enhance the accuracy of AI in your features.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

User Permissions Needed	
To set up Agentforce Data Libraries:	Data Cloud admin AND System Administrator permissions.

Before using data libraries, you must have:

- [Data 360 enabled.](#)

You can create and assign data libraries to features from Agentforce Data Library setup or when you configure an agent in Agentforce Builder. Learn how to.

[Create a Data Library](#)

Create a data library and give it a unique name.

[Choose A Data Source for Your Library](#)

When you configure a data library, you can use knowledge articles, file uploads, web search or custom retrievers for the library's data source. The data source is indexed on Data Cloud where a search index and retriever are automatically created for you. When integrated with AI agents, the data library's search index and retriever are used by the Answer Questions with Knowledge action.

[Assign Data Libraries to Features](#)

See which features support data libraries and learn how to add your libraries.

[Test Data Libraries in a Sandbox](#)

A sandbox is a copy of your Salesforce org that you can use for development, testing, and training without compromising the data and applications in your production org. Agentforce Data Library is supported in all the sandbox types: Developer, Developer Pro, Partial Copy, and Full Copy.

See Also

[Agentforce Platform | Answer Questions with Knowledge](#)

[Data 360 Features and Learning Path](#)

[Agentforce Agents](#)

Create a Data Library

Create a data library and give it a unique name.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions with the Einstein for Platform or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

User Permissions Needed	
To set up Agentforce Data Libraries:	Data Cloud admin AND System Administrator permissions.

1. To create a data library, go to Agentforce Data Library in setup. Click **New Library**.
2. Enter a library name, and the API name is automatically populated. Optionally, enter a description.

The screenshot shows the 'Add a Data Library' configuration page. It includes fields for 'Select Data Space' (set to 'default'), 'Name' ('Service Agent Data'), 'API Name' ('Service_Agent_Data'), and a 'Description' field containing the text 'Knowledge sources for the Service Agent.' At the bottom are 'Cancel' and 'Save' buttons.

3. Click **Save**.

Choose A Data Source for Your Library

When you configure a data library, you can use knowledge articles, file uploads, web search or custom retrievers for the library's data source. The data source is indexed on Data Cloud where a search index and retriever are automatically created for you. When integrated with AI agents, the data library's search index and retriever are used by the Answer Questions with Knowledge action.

A data library can't support multiple data sources simultaneously. After you choose a library's data source, you can't change it later. You can create multiple data libraries and assign them to multiple features, but each feature can use only one data library at a time.

[Use Salesforce Knowledge](#)

Select the knowledge fields for your data library to index.

[Use Uploaded Files](#)

Select the files to upload for your data library to index.

[Use Web Search](#)

You can add the web search topic to your agent via your Agentforce Data Library.

[Use a Custom Retriever](#)

Use custom retrievers to connect to more types of data sources in Data 360 including ensemble retrievers, or, connect companion orgs to data libraries and search indexes configured in your home org.

See Also

[Data 360 Features and Learning Path](#)

[Agent Action: Answer Questions with Knowledge](#)

Use Salesforce Knowledge

Use Salesforce Knowledge

Select the knowledge fields for your data library to index.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

User Permissions Needed

To set up Agentforce Data Libraries:	Data Cloud admin AND System Administrator permissions.
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1. To configure a data library, select it and click **Edit**.
2. If you want to base a data library on your Knowledge articles, select the Knowledge tab.
 -  **Note** A data library supports Knowledge, file uploads or web search as a data source. After you choose a library's data source, you can't change it later.
3. Under Knowledge Field Settings, select identifying fields for the knowledge articles. Identifying fields help Agentforce locate the right information in your index. Identifying fields must be a text or text area type fields and are limited to 512 tokens. We recommend that you select fields that include a concise outline of the associated knowledge article.
 -  **Tip** To ensure you're in the token limit, select a field of the simple text type for the identifying field. Because the simple text field type is limited to 255 characters you can be certain its within the 512 token limit.
4. Select the content fields. Content fields help AI agents enrich responses with relevant details. We recommend that you select fields that include important details such as troubleshooting steps, product details, and special considerations. Knowledge data libraries support only text or text area type fields.

The screenshot shows the 'Knowledge' tab selected in the top navigation bar. Below it, the 'Ground with Knowledge' section is visible. Under 'Identifying Fields', there are two dropdown menus: 'Title' and 'Summary'. In the 'Content Fields' section, a table lists various fields with their names and types. The 'Question' field is checked under 'Field Label' and has 'Question__c' under 'Field Name' and 'TEXTAREA' under 'Field Type'. Other fields listed include 'Answer', 'Article Number', 'Assignment Note', 'Detail', 'Large Language Model', and 'Mapping info between old Article Version and migr...'. At the bottom right of the table are 'Cancel' and 'Save' buttons.

Field Label	Field Name	Field Type
<input checked="" type="checkbox"/> Answer	Answer__c	TEXTAREA
<input type="checkbox"/> Article Number	ArticleNumber	STRING
<input type="checkbox"/> Assignment Note	AssignmentNote	TEXTAREA
<input type="checkbox"/> Detail	Detail__c	TEXTAREA
<input type="checkbox"/> Large Language Model	LargeLanguageModel	STRING
<input type="checkbox"/> Mapping info between old Article Version and migr...	MigratedToFromArticleVersion	STRING
<input checked="" type="checkbox"/> Question	Question__c	TEXTAREA

5. In data library setup from Agent Builder, you can also include citations. A citation is a link to the Knowledge Article that a response is grounded on. To include citations select **Show sources**. Next, add your Salesforce Knowledge domain URL to link AI-generated responses to their source in your Knowledge base. If you don't include a specific Knowledge domain URL, it uses the publicly available URL. [Learn more about Knowledge domains](#).
6. Click **Save**.
7. Under Knowledge Settings, specify which articles are included in the data library. Only published articles are considered for the data library. See [Publish Articles and Translations](#).
8. To restrict indexed articles to articles that are publicly available in your Knowledge base, enable **Use Public Knowledge Articles**. Knowledge Articles that are publicly available have IsVisibleInPkb as True. See [Create a Knowledge Base with Salesforce Knowledge](#).
9. To filter indexed articles by data category, enable **Filter by Knowledge Data Categories**. Then, select the categories to include in your data library. See [Work with Data Categories](#).

Knowledge File Upload

Ground with Knowledge

Ground AI responses in your unique knowledge base when you add Knowledge to Einstein Data Libraries.

Fields Settings **Knowledge Settings**

Use Public Knowledge Articles
Draft responses only from articles in your public knowledge base.
 Disabled

Filter by Knowledge Data Categories
Filter the articles Einstein grounds on by data category.
 Enabled

Data Category Names

- ✓ Autos
- > Cars
- Trailers
- Trucks

Cancel **Save**

If you have a large knowledge base or product range, tailoring the data library to specific data categories makes the indexing and grounding more accurate and efficient.



Note To get results based on a data category it must be set as visible.

10. Save your work.

After you save your selections, data streams, a search index, and a retriever are created automatically and available to view or edit in Data 360. Monitor your data library's progress from Setup. When the status updates to "Your data library is ready to use!" you can test and use the library data with agents.

See Also

[Trailhead: Set Up a Simple Knowledge Base](#)

[Agent Action: Answer Questions with Knowledge](#)

Use Uploaded Files

Use Uploaded Files

Select the files to upload for your data library to index.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

User Permissions Needed

To set up Agentforce Data Libraries:

[Data Cloud admin AND System Administrator](#)

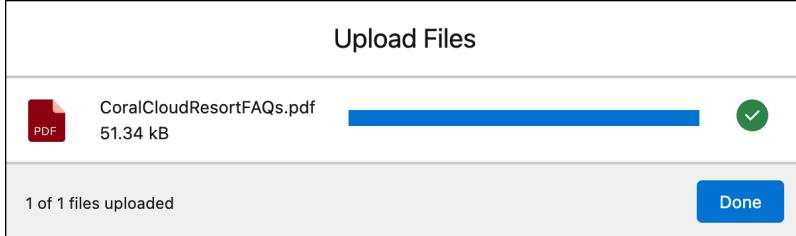
User Permissions Needed

permissions.

1. To configure a data library, select it and click **Edit**.
2. To base a data library on your files, select the **File Upload** tab.

 **Note** A data library supports knowledge articles, file uploads or web search as a data source. After you select a library's data source, you can't change it later.

3. To add files, click **Upload Files**, select your files, and click **Save**. Or, drag files directly into the upload box.



When you create a file-based data library with a PDF that's 10 MB or less, we automatically apply advanced processing tools. Advanced processing uses Intelligent Context to create the best search index and retrieval pipeline for your data. The first 5 files are evaluated to determine optimal indexing configuration using Intelligent Context, so we recommend that they best represent the information you want to include in your data library. See [Intelligent Context in Data 360](#).

 **Note** Data Cloud 1 orgs don't support advanced processing using Intelligent Context. Intelligent Context uses data credits. For more rate information see [Data 360 Billable Usage Types](#).

4. Go to the File Upload tab to see the files included in each data library.

Knowledge (0)	File Upload (1)
Add Files 	
 Upload Files	Or drop files
File Name	Size
CoralCloudResortFAQs.pdf	51.34 kB
Uploaded By	Uploaded On
OrgFarm Epic	Jan 9, 2025
Cancel Save	

 **Note**

- You can upload up to 4 MB for text or HTML files, or 100 MB for PDF files.
- When you add files to a data library, the search index associated with the data library rebuilds with the new files. While the library builds, its status changes to *In Progress* and it can't be used. Rebuild time can take from 30 minutes to several hours, and depends on the number and size of your files.
- During prompt template execution, a PDF file uploads as a binary file in the prompt request. Einstein Trust layer protections aren't applied to the contents of the PDF. See [Grounding with File Inputs](#).

5. Save your work.

After you save your selections, your data streams, a search index, and a retriever are created, which you can view or edit in Data 360. Monitor your data library's progress from Setup. When the status updates to "Your data library is ready to use!" you can test and use the library data with agents.

Use Web Search

Use Web Search

You can add the web search topic to your agent via your Agentforce Data Library.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

User Permissions Needed

To set up Agentforce Data Libraries:	Data Cloud admin AND System Administrator permissions.
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Have your agent search the web by either [adding the Search the Web action to your agent](#) or by creating a web based Agentforce Data Library and assigning that to your agent.

1. To create a data library, click **New Library**. Enter a name and the API name automatically populates. Optionally, enter a description. Click **Save**.
2. To add information from the web to your data library, under Data Type select **Web Search**.
3. Under Add Web Source Data, turn on web search.

Add Data Sources

Your library can have only one data type: Knowledge, files, or websites. After you create a data library, the data type can't be changed.

[Learn More in Help](#)

* Data Type i

Add Web Source Data

Your AI agent searches relevant websites to enrich data and improve accuracy of results.

Turn on Web Search

By turning on Web Search, you authorize Salesforce to retrieve publicly available internet search results for display to agents in response to end-user queries. You acknowledge and agree that Salesforce does not review, verify, or guarantee the accuracy, completeness, or safety of such search results, and that the results may include inaccurate, misleading, or objectionable content. For clarity, such internet search results constitute "Content" as defined in the Main Services Agreement.

On

Cancel Save

4. Save your work.
5. In setup, search for and select *Agentforce Agents*.
6. You can add a web search data library to an existing agent or create an agent.

← Agentforce Builder New Agent ? Help ▾

Back Create

<p>Steps</p> <ul style="list-style-type: none"> ✓ Select an agent ✓ Select your topics ✓ Customize your agent 4 Select data sources 	<p>Select data sources (Optional)</p> <p>Upload or add data sources so your Agent can generate accurate, relevant answers for your business. You can edit this later.</p> <p>Manage the data your agent uses to complete tasks via Agentforce Data Library. To manage your libraries, go to Agentforce Data Library Setup.</p> <p>Data Library <input type="text" value="ADL WebSearch Agent Library"/> X C</p>	<p>Add Data to Your Agentforce Service Agent</p> <p>Help your Service Agent search through your unstructured data, like knowledge articles, uploaded files, or even open web searches, to find the best answers to customer questions.</p> <p>Learn More in Help</p>
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- a. For an existing agent, open the agent in Agent Builder. To edit the agent's settings, deactivate it.
- b. For a new agent, select **New Agent** and go through the agent setup steps. For Select Data Sources, add your web search data library.
7. From Agent Builder, go to Topics. Select **New**, then **New Topic**.
8. To create a new topic, add this description: *General Web Search*. Click **Next**.
9. Next, copy and paste this classification description: *This topic is about enabling the agent to perform real-time web searches to obtain specific information about things*

but not about company policy, rules or anything related to this company. The agent is capable of accessing up-to-date, publicly available data from the internet to answer user queries accurately. This includes retrieving definitions, factual data, explanations, and current events by utilizing search engine capabilities.

10. **Copy and paste this topic scope:** *Your job is limited to accessing publicly available and non-confidential information. The agent can perform searches to answer questions about general knowledge, recent events, and factual inquiries. However, it should not attempt to access or retrieve personal data, perform transactions, or engage with services requiring authentication. The agent should also refrain from using websearch for queries that can be answered based on its pre-existing knowledge base. Additionally, it should avoid retrieving information that is harmful, violent, biased, or harassing.*
11. **Copy and paste these topic instructions:**
 - a. *If the customer's question is too vague or general, ask for more details and clarification to give a better answer.*
 - b. *If you are unable to help the customer even after asking clarifying questions, ask if they want to escalate this issue to a live agent.*
 - c. *Include sources in your response when available from the knowledge articles, otherwise proceed without them.*
 - d. *Determine if the user's query requires fresh data that may not be available in the pre-existing knowledge base, such as recent news, factual updates, or specific information about an entity.*
 - e. *If multiple sources provide conflicting information, highlight this to the user and provide the most reliable sources.*
 - f. *Summarize and present the information in an understandable format, ensuring relevance to the original query.*
 - g. *Avoid searching for or displaying sensitive or personal data. Only use publicly available information.*
 - h. *Ensure that the information retrieved is not harmful, violent, biased, or harassing the customer.*
 - i. *If a query does not fit the Websearch criteria or can be answered with existing knowledge, refrain from performing a web search and use the agent's built-in resources instead.*

Create a Topic

* Topic Label
General Web Search

* Classification Description ⓘ
This topic is about enabling the agent to perform real-time web searches to obtain specific information about things but not about company policy, rules or anything related to this company. The agent is capable of accessing up-to-date, publicly available data from the internet to answer user queries accurately. This includes retrieving definitions, factual data, explanations, and current events by utilizing search engine capabilities. 

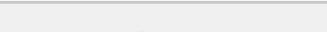
* Scope ⓘ
Your job is limited to accessing publicly available and non-confidential information. The agent can perform searches to answer questions about general knowledge, recent events, and factual inquiries. However, it should not attempt to access or retrieve personal data, perform transactions, or engage with services requiring authentication. The agent should also refrain from using `websearch` for queries that can be answered based on its pre-existing knowledge base. Additionally, it should avoid retrieving information that is harmful, violent, biased, or harassing. 

Instructions ⓘ

The following instructions are used to run this topic.

* Instruction ⓘ
If the customer's question is too vague or general, ask for more details and clarification to give a better answer.  

* Instruction ⓘ

Back  Next

Create a Topic

* Instruction ⓘ
If you are unable to help the customer even after asking clarifying questions, ask if they want to escalate this issue to a live agent.  

* Instruction ⓘ
Include sources in your response when available from the knowledge articles, otherwise proceed without them.  

* Instruction ⓘ
Determine if the user's query requires fresh data that may not be available in the pre-existing knowledge base, such as recent news, factual updates, or specific information about an entity.  

* Instruction ⓘ
If multiple sources provide conflicting information, highlight this to the user and provide the most reliable sources.  

* Instruction ⓘ
Summarize and present the information in an understandable format, ensuring relevance to the original query.  

* Instruction ⓘ
Avoid searching for or displaying sensitive or personal data. Only use publicly available information.  

* Instruction ⓘ
Ensure that the information retrieved is not harmful, violent, biased, or harassing the customer.  

[Back](#)  [Next](#)

Click **Next**.

12. For actions, select the **Answer Questions with Knowledge** action. Click **Finish**.

Add Available Actions

Select the actions you want to include in your topic.

93 items • Sorted by Agent Action Label(asc)

<input type="checkbox"/>	Agent Action Label ↑	Instructions
<input type="checkbox"/>	Add Case Comment	Let a customer add a comment to an ...
<input type="checkbox"/>	Add Record to Cadence	Assigns or adds a Lead/lead or Conta...
<input checked="" type="checkbox"/>	Answer Questions with Knowle...	Answers questions about company p...
<input type="checkbox"/>	Cancel Order	Cancels a customer's order.
<input type="checkbox"/>	Create a Label	Create a label with the specified label...
<input type="checkbox"/>	Create a Slack Canvas	Create a Slack canvas document with...
<input type="checkbox"/>	Create a To Do	Create a task record based on user in...
<input type="checkbox"/>	Create Case	Let a customer create a case.
<input type="checkbox"/>	CustomKnowledgeAction_1729...	Answers questions about company p...
<input type="checkbox"/>	CustomKnowledgeAction_1729...	Answers questions about company p...
<input type="checkbox"/>	CustomKnowledgeAction_1729...	Answers questions about company p...
<input type="checkbox"/>	CustomKnowledgeAction_1729...	Answers questions about company p...
<hr/>		
<input type="button" value="Cancel"/>	<input type="button" value=""/>	<input type="button" value="Finish"/>

Note Only one topic per agent can use the Answer Questions with Knowledge action. If you don't see the action, check it isn't assigned to one of your other actions.

13. To use web search with your agent, you'll need to remove the General FAQ topic, but its function will be replaced with the General Web Search topic. From Topics, for the General FAQ topic, from the drop-down menu, select **Remove from Agent**.
- Important** You must remove the General FAQ topic to use an Agentforce Data Library with web search.
14. Activate your agent. Now, you can test the agent with your web search data library.

Use a Custom Retriever

Use a Custom Retriever

Use custom retrievers to connect to more types of data sources in Data 360 including ensemble retrievers, or, connect companion orgs to data libraries and search indexes configured in your home org.

REQUIRED EDITIONS

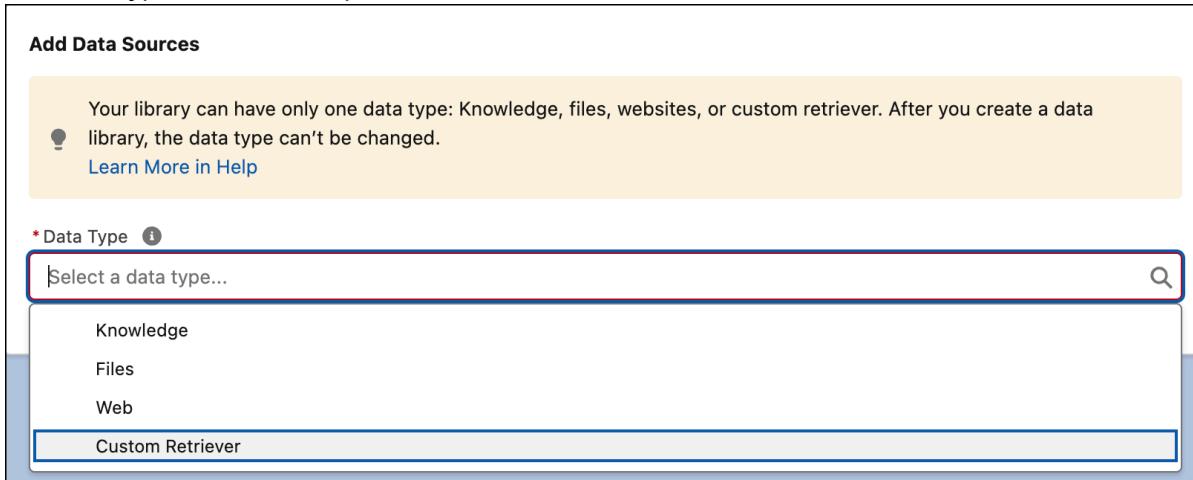
Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

To use Agentforce Data Libraries, you must have [Data 360 set up](#). Data libraries consume Data 360 credits.

To connect to a custom retriever from your home org, you must first [create a search index in Data 360](#) and then [create a retriever for that search index](#) and activate it.

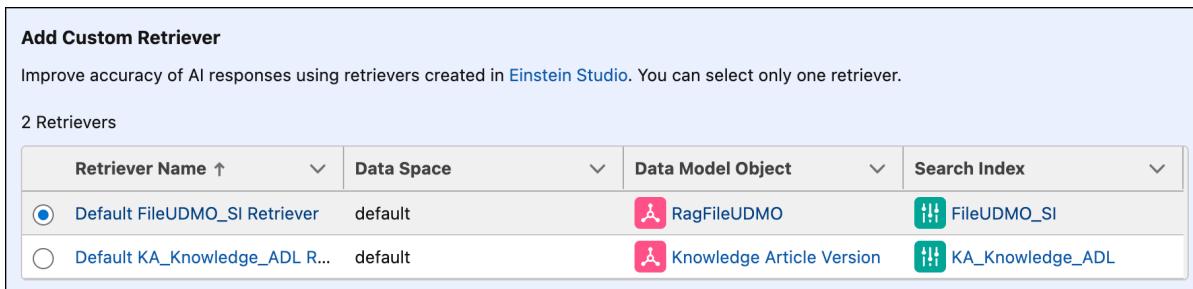
1. From Setup, in the Quick Find box, search for and select Agentforce Data Library.
2. Click **New Data Library**. Enter a name and the API name automatically populates. Optionally, enter a description. Click **Save**.
3. For Data Type, from the dropdown menu, select **Custom Retriever**.



4. The available custom retrievers appear in a table.

Note You can only connect to retrievers that exist in the home org. To use a data library in a companion org, you must first configure the data library in the home org.

Select the retriever that is linked to the data library or data you want to access. Only active retrievers are listed.



Note Considerations for selecting a retriever.

- A retriever with the *File_...* prefix connects to your uploaded file search index.
- A retriever with the *KA_...* prefix connects to Knowledge based search indexes.

- A retriever with the `Web_...` prefix connects to web sources.
 - In your home org, you can only connect to retrievers created in Data 360.
 - You can only connect to retrievers that exist in the home org. To use a data library in a companion org, you must first configure the data library in the home org.
 - Custom retriever type data libraries only support individual retrievers. Ensemble retrievers aren't currently supported.
 - When you create a data library with a custom retriever in a companion org, you can't delete the associated retriever in the home org. To delete it in the home org, you'll first need to deselect the retriever in the companion org.
5. To use an ensemble retriever and assign multiple data libraries to your agent, first [Create an Ensemble Retriever](#). Once you've created your ensemble retriever, you can select it from the list of active retrievers.

Add Data Sources

Configure the sources you want to include in your data library. These sources give AI agents the data they need to generate accurate responses customized to your business. [Learn More in Help](#)

Your library can have only one data type: Knowledge, files, websites, or custom retriever. After you create a data library, the data type can't be changed.

* Data Type [?](#)

Custom Retriever

Add Custom Retriever

Improve accuracy of AI responses using retrievers created in [Einstein Studio](#). You can select only one retriever.

26 Retrievers

Retriever Name ↑	Data Space	Data Model Object	Search Index
Default RagFileUDMO_V2u Retriever	default	RagFileUDMO_V2	RagFileUDMO_V2u
Ensemble	default		
File Retriever	default	RagFileUDMO	FileUDMO_SI
File_Car_Charging_Manual	default	RagFileUDMO	FileUDMO_SI

[Cancel](#) [Save](#)

6. Save your work.

Now you can connect agents to more types of data stored in Data 360, or you can connect data libraries and data from your home org with agents in your companion orgs. To link your companion org to multiple data libraries in your home org, create a custom retriever type data library and select the associated retriever for each library.

Assign Data Libraries to Features

See which features support data libraries and learn how to add your libraries.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

See which features are linked to each library from the data library setup.

Library Name	API Name	Data Space	Description
Product Manual	product_manual	default	

Feature Assignments (1)
Service Replies

Knowledge (0) File Upload (1)

Add Files ⓘ

Upload Files Or drop files

File Name	Size	Uploaded By	Uploaded On
manual.pdf	25.46 MB	Agent One	Dec 3, 2024

You can create multiple data libraries and assign them to multiple features, but each feature can use one data library at a time. To add a data library, go to the setup for that feature.

Feature	Description	Enabled with AI Agents
Assign a Data Library to Your Agent	Improve your agent's response accuracy and personalize answers with trusted data sources.	Yes
Einstein Service Replies	Follows a chat conversation as it unfolds and then drafts and recommends fluent, courteous, and relevant replies for your agents to review, edit, and post.	No
Agentforce Service Agent	Agentforce Service Agents support your customers in your channels and escalates to service reps when necessary.	Yes
Agentforce Service Assistant	Agentforce Service Assistant is an assistive Agentforce agent that helps service reps resolve cases faster with real-time case summaries and step-by-step resolution guidance.	Yes

Assign a Data Library to Your Agent

Improve your agent's response accuracy and personalize answers with trusted data sources via Agentforce Data Library.

Assign a Data Library to Your Agent

Assign a Data Library to Your Agent

Improve your agent's response accuracy and personalize answers with trusted data sources via Agentforce Data Library.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To manage AI agent data sources:

[Data Cloud Architect permission set](#) AND System Administrator profile

Before you begin, [turn on Data 360](#).

When you create and configure a data library, the Agentforce Data Library indexes your selected knowledge articles and uploaded files in Data 360. Data 360 creates a search index and retriever for your library that your AI agent can use via the Answer Questions with Knowledge action. In Agent Builder, you can select which data library your agent uses to generate responses.

1. From Setup, in the Quick Find box, enter *Agents*, and then select **Agents**.
2. Click the name of your agent. Then click **Open in Builder**.
3. Click the **Data** tab.
 - a. Select a library for your agent or, to create a library, click **New Library**. If you select or create a library, you can configure the knowledge fields, file uploads or web search for your data library to index. If you create a library, it can take a few minutes for the preview conversation to update.
 - b. To base agent responses on all Knowledge articles and fields, select **All Knowledge records and fields**.
4. Save your changes.

To test out your changes, restart the preview conversation and then chat with your agent.

See Also

[Agentforce Platform | Answer Questions with Knowledge](#)

[Trailhead: Retrieval Augmented Generation: Quick Look](#)

[Using Retrieval Augmented Generation](#)

Test Data Libraries in a Sandbox

A sandbox is a copy of your Salesforce org that you can use for development, testing, and training without compromising the data and applications in your production org. Agentforce Data Library is supported in all the sandbox types: Developer, Developer Pro, Partial Copy, and Full Copy.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Use a sandbox to:

- Test changes against copies of your production data and users.
- Provide a training environment.
- Test AppExchange packages or integrations.
- Isolate customization and development work from your production environment until you're ready to deploy changes.

Before you begin, complete these prerequisites.

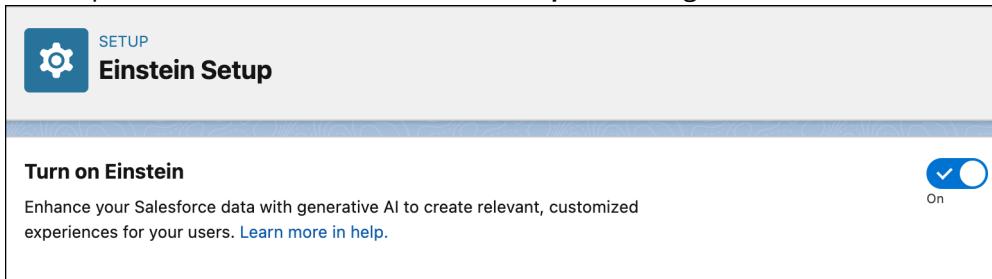
- [Provision a Data 360 sandbox](#).
- [Check that you have Agentforce Data Library licenses and permissions](#).

Considerations:

- Making Agentforce Data Library changes in a sandbox and deploying those changes back to the production org or another sandbox org isn't supported.
- Data 360 sandboxes contain only metadata. No data is replicated when you provision Data 360 in a sandbox, even in partial copy and full copy sandboxes.
- Connections are replicated to the sandbox, but the authorization data isn't replicated. You configure the connection in the sandbox. After you configure the connection, the data flows into the sandbox.

In your sandbox org:

1. In the Data Cloud app, check that your search indexes and retrievers were copied correctly from your home org.
2. In setup, search for and select **Einstein Setup**. Turn on generative AI.



3. Next, in the Quick find box, search for and select **Agentforce Data Library**. Check that your data libraries were copied correctly from your home org.

Data Libraries				
Help your AI agents focus on the right objects and fields. Create different libraries to customize the information that Agentforce grounds on for different features.				
29 libraries available				
New Library +				
Library Name	API Name	Data Source	Feature Assignments	Actions
ADL Agent Library	ADL_Agent_Library_1741905...	Files	Unassigned	▼
ADL knowledge 21Feb	ADL_knowledge_21Feb	Knowledge	Unassigned	▼
ADL WebSearch Agent Libr...	ADL_WebSearch_Agent_Libr...	Web	Unassigned	▼
ADL Websearch Test 21	ADL_Websearch_Test_21	Web	Unassigned	▼
Agent Websearch 21 Library	Agent_Websearch_21_Library...	Web	Unassigned	▼
Agentforce Service Agent -...	Agentforce_Service_Agent_t...	Web	Unassigned	▼

4. For file based data libraries, files aren't copied into sandbox orgs. Re-upload files to their respective data libraries.
 5. For knowledge-based data libraries, check that your knowledge articles were copied over correctly. In the Knowledge app, under Published Articles, you see the articles that you want to test with your agents.

Data Libraries				
Help your AI agents focus on the right objects and fields. Create different libraries to customize the information that Agentforce grounds on for different features.				
29 libraries available				
New Library +				
Library Name	API Name	Data Source	Feature Assignments	Actions
ADL Agent Library	ADL_Agent_Library_1741905...	Files	Unassigned	▼
ADL knowledge 21Feb	ADL_knowledge_21Feb	Knowledge	Unassigned	▼
ADL WebSearch Agent Libr...	ADL_WebSearch_Agent_Libr...	Web	Unassigned	▼
ADL Websearch Test 21	ADL_Websearch_Test_21	Web	Unassigned	▼
Agent Websearch 21 Library	Agent_Websearch_21_Library...	Web	Unassigned	▼
Agentforce Service Agent -...	Agentforce_Service_Agent_t...	Web	Unassigned	▼

 **Note** For Developer orgs, only your metadata is copied over. To test a knowledge based data library, copy over knowledge articles.

6. In the Data Cloud app, go to Data Streams and refresh these data streams.
- AiGroundingFileRef_Home
 - DataCategory_Home
 - DataCategoryGroup_Home
 - Knowledge_DataCategorySelection_Home
 - Knowledge_kav_Home

	Data Stream Name	Data Conn...	Str...	Las...	Da...	La...	To...	Last Refreshed	
1	Knowledge_DataCategorySelection_Home	Salesforce CRM	Ingest	Success	Active	0	0	11/8/2024, 11:22 AM	
2	DataCategoryGroup_Home	Salesforce CRM	Ingest	Success	Active	0	0	11/8/2024, 11:22 AM	
3	Knowledge_kav_Home	Salesforce CRM	Ingest	Success	Active	12	11	3/15/2025, 3:04 AM	
4	DataCategory_Home	Salesforce CRM	Ingest	Success	Active	0	0	11/8/2024, 11:22 AM	
5	AiGroundingFileRef_Home	Salesforce CRM	Ingest	Success	Active	4	3	3/15/2025, 3:05 AM	

7. To ensure that retrievers are working in your sandbox, for files go to Einstein Studio and deactivate then reactivate the retriever used by the data library. For knowledge, update a content field in the data library knowledge setup then save and revert it. This updates the retriever version and syncs the metadata.
8. To test your data libraries with agents, in the Quick find box, search for and select **Agentforce Agents**. Select the agent that you want to test, and open it in Agentbuilder.

From Agentbuilder you can query the agent and test how data from your libraries appears in large language model (LLM) responses.

Update Data Libraries

Change your Knowledge settings and assigned features.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

- To update your knowledge settings or uploaded files, select your target library and click **Edit**. For

- Knowledge, change the content field selections and knowledge settings, and then turn citations on or off. For File Upload, add or delete files. When you're happy with your changes, click **Save**.
- To update the features a library is assigned to, go to setup for that feature and change or remove the library. Or, from Agentforce Builder, go to the Knowledge tab. Under Data Library, select the data library you want to use from the dropdown menu, then click **Save Configuration**.
 - Existing Knowledge-based libraries update if there are changes to knowledge articles, such as the addition of new articles.

Agentforce Data Library Troubleshooting

Diagnose issues and avoid common pitfalls in your Agentforce Data Library.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions with the Einstein for Platform or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

My service reps aren't seeing answers with data library information.

Make sure that your service reps have the right permissions to use features with data libraries and access sources.

Data Library type	Access and Permissions
General	<ul style="list-style-type: none">• To access the retriever and default data space assign the Data Cloud User. Make sure to add the default dataspace to the Data Cloud User perm.• To access the hydrated prompt and call the LLM, assign the Prompt Template User.
Knowledge	<p>Check that:</p> <ul style="list-style-type: none">• The source articles are public and published. Knowledge Articles that are publicly available have IsVisibleInPkb as True. See Create a Knowledge Base with Salesforce Knowledge.• Your data categories are visible.• Service reps have Read access to the knowledge object and the knowledge article fields that're being used in the search index.• Service reps have the Allow View Knowledge user perm.• Service reps have access to the default data space.

Data Library type	Access and Permissions
File	<p>Check that:</p> <ul style="list-style-type: none"> • Service reps have access to the default data space.

What does the data library status mean?

You can see the data library status on the Agentforce Data Library setup page.

Status	Meaning
Failed	The library isn't usable or won't work the way we expect. If the data library was saved then your configuration was also saved but a retriever wasn't created.
Not Started	The retriever and search index were created but chunking hasn't started yet. Wait for the status to change to In Progress.
In Progress	The data is being chunked and the library still isn't ready to use.
Success	Chunking and search index are complete and ready to be used.

See Also

[Troubleshooting Knowledge Retrieval for Agents](#)

Retrieval Augmented Generation

Use Retrieval Augmented Generation (RAG) in Data 360 to improve large language model (LLM) responses for agents and users. RAG is a framework for grounding prompts with relevant, accurate knowledge from unstructured data sources.

About Retrieval Augmented Generation

Learn how Retrieval Augmented Generation (RAG) in Data 360 enhances your Agentforce and Einstein generative AI solutions with knowledge.

Example: Agentic RAG with Advanced Data 360 Setup

This example walks you through the end-to-end steps to implement an agent that's grounded with knowledge using Retrieval Augmented Generation (RAG) in Data 360.

Troubleshooting Knowledge Retrieval for Agents

Solve common retrieval augmented generation (RAG) issues for agents.

See Also

- [*Salesforce Help \(Data 360\): Search for AI, Automation, and Analytics*](#)
- [*Salesforce Help: Manage Retrievers in Einstein Studio*](#)
- [*Ground with Knowledge Using Retrieval Augmented Generation*](#)
- [*Trailhead: Retrieval Augmented Generation: Quick Look*](#)
- [*Video: Improve Agentforce with RAG*](#)

About Retrieval Augmented Generation

Learn how Retrieval Augmented Generation (RAG) in Data 360 enhances your Agentforce and Einstein generative AI solutions with knowledge.

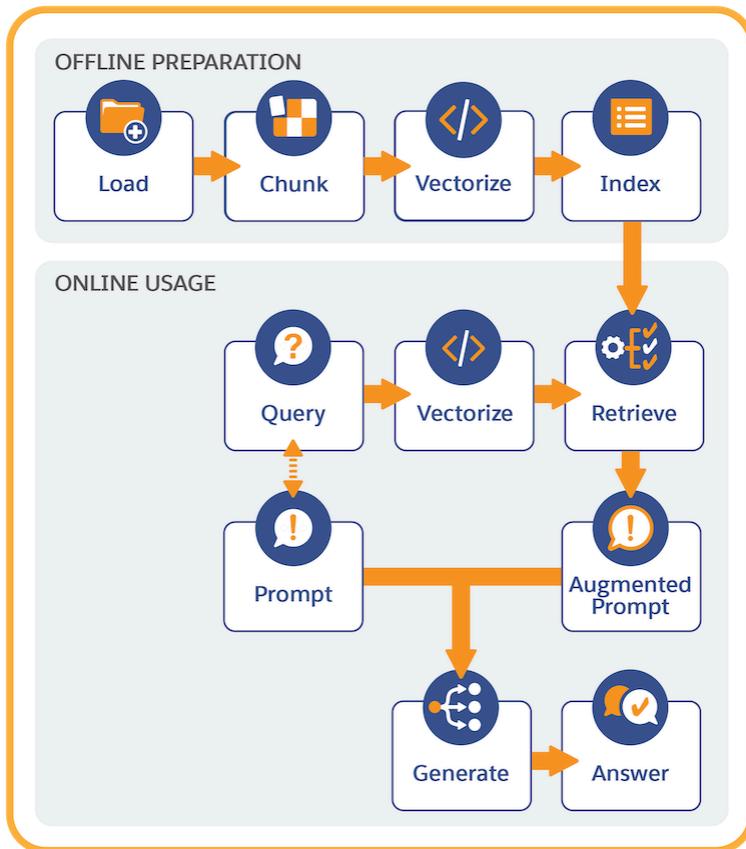
RAG In Action

When you submit a large language model (LLM) prompt, RAG in Data 360:

- Retrieves relevant information from a knowledge store containing structured and unstructured content
- Augments the prompt by combining this information with the original prompt
- Generates a prompt response

Overview of RAG In Data 360

It's helpful to think of RAG in two main parts: offline preparation and online usage.



Quick Start for Offline Preparation

The fastest way to set up your RAG solution is to [Create a Data Library](#), either in Agentforce Builder or Setup. When you create an Agentforce Data Library library, you automatically create all the elements needed for a working RAG-powered solution. Salesforce uses default settings for all of the components: vector data store, search index, retriever, prompt template, and standard action. If you want, you can then customize these elements to fine-tune RAG solutions for your use cases.

Advanced Setup for Offline Preparation

To implement RAG in Data 360, start by connecting structured and unstructured data that RAG uses to ground LLM prompts. Data 360 uses a search index to manage structured and unstructured content in a search-optimized way. Content can be ingested from a variety of sources and file types. Some examples of unstructured content used with RAG include service replies, cases, RFP responses, knowledge articles, FAQs, emails, and meeting notes.

Offline preparation involves these steps:

1. Connect your unstructured data.
2. Create a search index configuration to chunk and vectorize the content.

Chunking breaks the text into smaller units, reflecting passages of the original content, such as sentences or paragraphs. Vectorization converts chunks into numeric representations of the text that capture semantic similarities.

3. Store and manage the search index in Data 360.

To learn more, see [Search for AI, Automation, and Analytics](#).

Retrievers serve as the bridge between search indexes and prompt templates. Retrievers further refine the search criteria and retrieve the most relevant information used to augment prompts. To support a variety of use cases, you create custom retrievers in Einstein Studio. To learn more, see [Retrieve Data](#).

Online Usage

The final piece of the RAG implementation puzzle is to add a call to a retriever in a prompt template. For a given prompt template, the prompt designer can customize retriever query and results settings to populate the prompt with the most relevant information. To learn more, see [Ground with Knowledge Using Retrieval Augmented Generation](#).

Each time a prompt template with a retriever is run, this sequence occurs:

1. The prompt template invokes the retriever with a dynamic query.
2. The query is vectorized (converted to numeric representations). Vectorization enables search to find semantic matches in the search index (which is already vectorized).
3. The query retrieves the relevant context from the indexed data in the search index.
4. The original prompt is populated with the information retrieved from the search index.
5. The prompt is submitted to the LLM, which generates and returns the prompt response.

Many LLMs were trained generally across the Internet on static and publicly available content. RAG adds information to a prompt that's accurate, up-to-date, and not available as part of the LLM's trained knowledge. It's like supplementing the LLM's capabilities by providing relevant information retrieved from a knowledge store that contains the latest, best version of the facts. With RAG, prompt template users can bring proprietary data to the LLM without retraining and fine-tuning the model, resulting in generated responses that are more pertinent to their context and use case.

Example: Agentic RAG with Advanced Data 360 Setup

This example walks you through the end-to-end steps to implement an agent that's grounded with knowledge using Retrieval Augmented Generation (RAG) in Data 360.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

You don't need any prior knowledge of Data 360, Einstein Studio, or Agentforce. For a high-level overview, see [About Retrieval Augmented Generation](#) and [Retrieval Augmented Generation: Quick Look](#) in Trailhead.

Approaches to Building RAG-Powered Agents

There are two main approaches to setting up a RAG-powered agent.

- **Quick Start.** The benefit of this approach is that you're up and running with a working solution for your agent without needing to configure all the individual components under the hood. The quick-start approach is to create a data library using Agentforce Data Library. When you create a data library, you select a data source (HTML, PDFs, Knowledge object, uploaded files, web search, or custom retrievers) to search, and assign it to an agent. Agentforce Data Library generates all the underlying RAG solution components automatically. To learn more, see [Agentforce Data Library](#) in Salesforce Help and [Agentforce Data Library Basics](#) in Trailhead.
- **Advanced.** The benefit of this approach is that you work directly with the builder tools and gain exposure to the full range of settings and options you can use to customize a RAG solution for a given use case.

This example walks through the advanced approach. By setting up each component individually, you gain an end-to-end, visceral understanding of its configuration options and how it fits into the RAG solution stack. You're welcome to follow along with the instructions in a Salesforce Developer org. Note that your results may vary.

Scenario in this Example

RAG is expert at extracting relevant information from unstructured data, which includes documents, web sites, and free-form text fields in structured data. This scenario uses free-form text (subject and description) that you add to a Salesforce Case object. An agent can use this information to inform user questions about product issues. Other data source options are described elsewhere in Salesforce Help and Trailhead.

Step 1: Set Up a Salesforce Developer Edition Org

This step walks you through instructions to get and prepare a Salesforce Developer Edition org, which is required to complete the remaining steps in this example.

To sign up, click <https://www.salesforce.com/form/developer-signup/?d=pb>.

Note

- If you'd prefer to use a different Salesforce org, verify that it offers comparable functionality: Data 360 is enabled and provisioned, Einstein is enabled, Agentforce is enabled, Prompt Builder is available, and it's OK for you to add cases. Note that your user permissions and other org settings

can affect your ability to complete all the steps in this example.

- If you're following along with the instructions and your org runs into unexpected issues, try refreshing your browser window. You can also try going back and repeating previous instructions.

1. Log into the Salesforce Developer Edition org.
2. Check your Data Cloud setup. From Setup, in the Quick Find box, enter *Data Cloud Setup*. If you see **Your Data Cloud instance is live** under Your Home Org Details, then Data Cloud is already enabled.

Data Cloud turned on and running

The screenshot shows the "Welcome to Data Cloud" page. At the top, there is a button labeled "Data Cloud Guidance". Below it, a section titled "Learn About Data Cloud" is shown. A box labeled "Your Home Org Details" is expanded, revealing the message: "Your Data Cloud instance is live and connected to your home org." This entire "Your Home Org Details" section is highlighted with a thick orange border.

3. If Data Cloud isn't already enabled, to enable it, follow the instructions in-app or in [Turn On Data Cloud](#) in Data Cloud Help). Click **Get Started** to initiate the setup process.

Get Started with Data Cloud Setup

Set Up Data Cloud

Lay the groundwork to get started.



Set Up Your Data Cloud Instance

This process runs automatically. You can navigate away while it's in progress.

Automated Steps

- Creating your Data Cloud instance
- Setting up your metadata
- Initializing the Customer 360 Data Model
- Making sure everything is ready to go

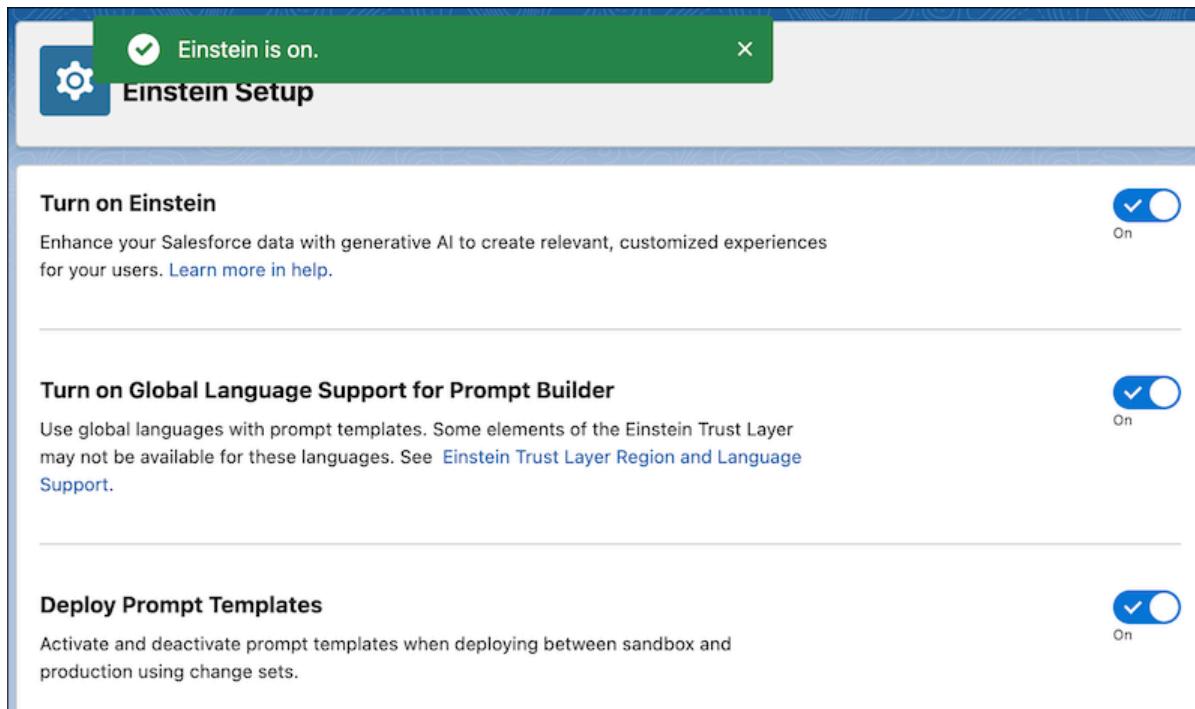
Get Started



Note A Data Cloud initial setup can take around 30 minutes or more.

4. When finished, verify that Data Cloud is enabled. Confirm that **Your Data Cloud instance is live** appears under Your Home Org Details.
5. Check your Einstein Generative AI Setup. From Setup, in the Quick Find box, enter *Einstein Setup*. Make sure that **Einstein**, **Global Language Support for Prompt Builder**, and **Deploy Prompt Templates** are all turned on.

Turn On Einstein Options

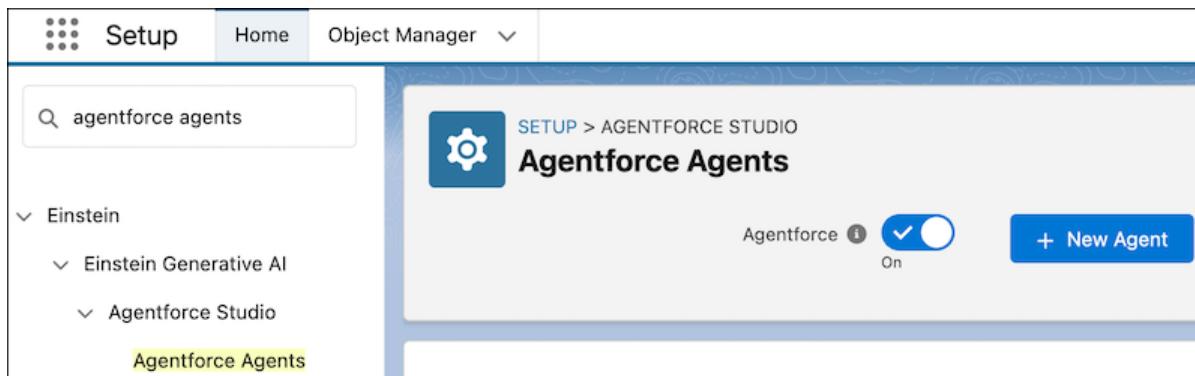


Note When turned on, it can take a few minutes for Einstein enablement to take effect.

- From Setup, in the Quick Find box, enter *Agent*, and then select **Agentforce Agents**. To enable Agentforce, turn on **Agentforce**.

If you can't find **Agentforce Agents**, refresh your browser window or wait a little longer while Einstein enablement takes effect.

Turn On Agentforce



Step 2: Add Case Data

Create at least five Case records that name a product and describe a problem that a customer is having.

- In App Launcher, enter *Service* and open Service Cloud.
- Select **Cases -> New** and add your cases. For each case, specify a subject, a description that details a customer problem, and select a case origin. Skip other fields and accept the defaults. Here's some

example data to enter.

Example Subject	Example Description
Power cord caught fire	The power cord caught fire the first time I tried to use my toaster oven to cook a pizza.
Toaster oven won't start	The toaster oven is plugged in but when I push the power button, nothing happens. Nothing lights up. There's no power.
Toaster temperature not heating up enough	I turned the toaster oven to the broil setting but the temperature doesn't go above lukewarm even after 10 minutes.
Toast burns on lowest temperature setting	The toaster oven always burns my toast, even when I select the Light setting.
Crumbs caught fire	Crumbs from my bagel dropped to the bottom of the toaster oven and caught fire.
Toaster turns off suddenly for no reason	If I'm cooking anything for more than 15 minutes, the toaster oven shuts off automatically.
Toaster oven arrived broken	The glass window was broken when I opened the package.
Package arrived crushed	The toaster oven was visibly damaged when I opened the crushed delivery package.

Step 3: Ingest Case Data into Data Cloud

RAG-powered solutions use search indexes that are created in Data Cloud. To ingest your free-form case data into Data Cloud, create a data stream.

1. In App Launcher, enter and select **Data Cloud**.
2. Select the Data Streams tab, click **New**, select **Salesforce CRM**, and click **Next**.
3. Click **View Objects**, search for and select **Case**, and click **Next**.

Select the Case Object

To ensure data is ingested from fields and objects created in the future, we recommend granting View All Fields (Global) system permission on the [Learn](#) Data Cloud Salesforce Connector permission set. [More](#)

Select an org to ingest data from, then select an object or data bundle.

Salesforce Org
Salesforce, Inc. [View Bundles](#) [View Objects](#)

Salesforce Objects (994) 1 selected

Object Name ↓	Object API Name	Data Stream	Is Custom Object
<input checked="" type="checkbox"/> Case	Case		
<input type="checkbox"/> Case Comment	CaseComment		
<input type="checkbox"/> Case Contact Role	CaseContactRole		
<input type="checkbox"/> Case Feed	CaseFeed		
<input type="checkbox"/> Case History	CaseHistory2		
<input type="checkbox"/> Case Milestone	CaseMilestone		
<input type="checkbox"/> Case Related Issue	CaseRelatedIssue		
<input type="checkbox"/> Case Related Issue Feed	CaseRelatedIssueFeed		
<input type="checkbox"/> Case Solution	CaseSolution		

[Previous](#) [Next](#)

4. For the Object Category, select **Profile**.
5. All fields are selected by default. In the **Standard Fields** tab, select only these fields (deselect the others).

Field	Description
System Modstamp	Required
Subject	A summary of the customer's issue that can be used to answer the customer's question.
Description	Additional details that can be used to answer the customer's question.
Case ID	Required but not needed for this simple use case. For more advanced use cases, you can use the Case ID to get additional related information, such as from an Account.

 **Note** The Case Comment field can also provide useful data for RAG searches, but it's not needed for this simple example.

6. Accept the selections in the **Custom Fields** tab. Then click **Next**.
7. Click **Deploy**.
-  **Note** Ingesting data can take time.
8. To check status, in the Data Streams menu, click the down arrow next to your new data stream, and select **Update Status**.

When **Last Run Status** is **Success** and **Total Records** has a number, your data is in Data Cloud.

Data Ingested into Data Cloud

Data Streams							
Recently Viewed ▾							
<input type="button" value="New"/> <input type="button" value="Delete Data Stream"/> <input type="button" value="Update Status"/>							
1 item - Updated a few seconds ago							
	Data Stream ... ▾	Data Connector ... ▾	Stream ... ▾	Last Run ... ▾	Data Str... ▾	Last Pro... ▾	Total Re... ▾
1	<input type="checkbox"/> Case_Home	Salesforce CRM	Ingest	Success	Active	0	34
						7/28/2025, 4:51 PM	

Step 4: Inspect Your Data Lake Object (DLO)

The data stream creates a Data Lake Object (DLO) called `Case_Home__d11`. It's useful to inspect the ingested data, which can help you debug and optimize your RAG solution.

1. Go to the Data Explorer tab in Data Cloud, select **Data Lake Object** as the Object Type, and select **Case_Home**. Don't change the data space.
2. Click **Edit Columns**. Move **Potential Liability** to **Available Columns** if it's not already there. Move **Subject** to **Selected Columns** if it's not already there. Leave all other columns where they are, and click **Done**.

Edit Columns for Case_Home DLO

Edit Columns for 'Case_Home'

Select Columns

Available Columns

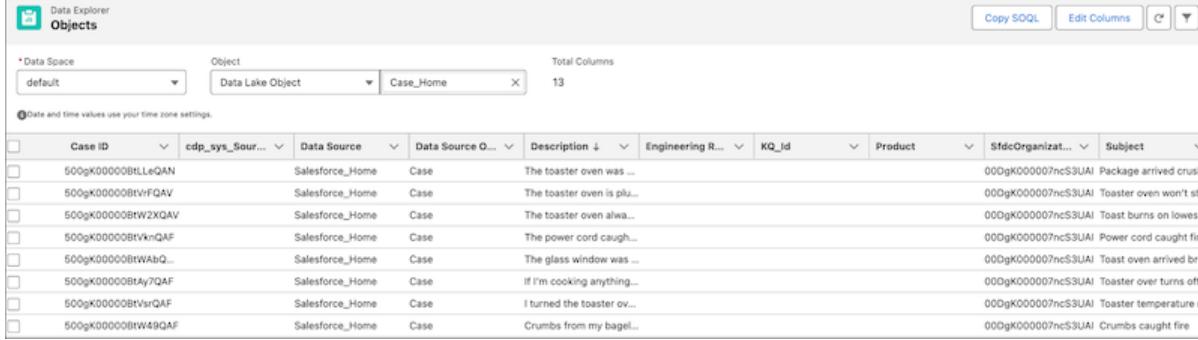
- Potential Liability
- SLA Violation
- System Modstamp

Selected Columns

- Description
- Engineering Req Number
- KQ_Id
- Product
- SfdcOrganizationId
- Subject

3. Click the **Description** column twice to sort and show your case data at the top.

Case Data in Case_Home DLO



The screenshot shows the Data Explorer interface with the following details:

- Data Space:** default
- Object:** Data Lake Object
- Case_Home**
- Total Columns:** 13
- Tip:** Date and time values use your time zone settings.
- Columns:** Case ID, cdp_sys_Source, Data Source, Data Source Order, Description, Engineering Reason, KQ_Id, Product, SfdcOrganization, Subject.
- Rows:** 8 rows of case data from Salesforce_Home, including descriptions like "The toaster oven was ...", "The power cord caught fire", etc., and corresponding SfdcOrganization values.

Tip Developers: To query your Case DLO, click **Copy SOQL** and copy the query to use in Developer Console or in the [Data Cloud Query Editor](#). You can also query the DLO using a REST client like Postman.

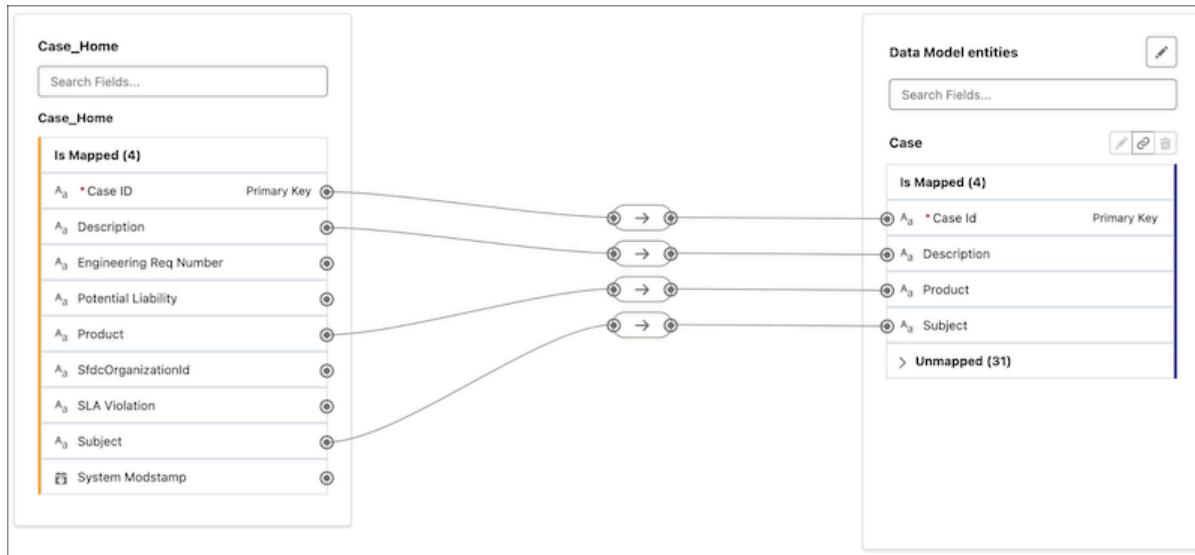
Step 5: Map Your Case DLO to a Case DMO

Map a DLO to a Data Model Object (DMO) to add an additional layer of structure to your data and make it easier to query and interact with. Map the **Case_Home** DLO to the **Case** DMO.

Note DLOs and DMOs are powerful tools for building RAG solutions. For example, you can perform data cleansing on your DLO, map multiple data sources to a single DMO, or perform identity resolution.

1. In the Data Lake Objects tab, open **Case_Home**.
2. In the Data Mapping panel, click **Start**.
3. Under Data Model Entities, click **Select Objects**, search for **Case** in the **All Objects** panel, click the + sign next to it, and click **Done**. DLO and DMO fields are automatically mapped.

DLO-to-DMO Mapping



- Save your work.

Step 6: Inspect Your Data Model Object (DMO)

The mapping performed in the previous step created a DMO called `ssot__Case__dlm`.

- In Data Explorer, for **Object**, select **Data Model Object**, then search for and select **Case**.
- Click the **Description** column twice to sort and show your case data at the top.

Data in the DMO

Data Explorer		Objects			Copy SOQL	Edit Columns	
Data Space	Object	Total Columns					
default	Data Model Object	Case					
Date and time values use your time zone settings.							
Case Id	Data Source	Data Source Object	Description	Key Qualifier	Case Id	Product	Subject
View 500gK00000BtLLeQAN	Salesforce_Home	Case	The toaster oven was visible...			Package arrived crushed	
View 500gK00000BtVrFQAV	Salesforce_Home	Case	The toaster oven is plugge...			Toaster oven won't start	
View 500gK00000BtW2XQAV	Salesforce_Home	Case	The toaster oven always bu...			Toast burns on lowest tem.	
View 500gK00000BtVknQAF	Salesforce_Home	Case	The power cord caught fire...			Power cord caught fire	
View 500gK00000BtWAbQAN	Salesforce_Home	Case	The glass window was brok...			Toaster oven arrived broken	
View 500gK00000BtAy7QAF	Salesforce_Home	Case	If I'm cooking anything for ...			Toaster over turns off sud...	
View 500gK00000BtVsrsQAF	Salesforce_Home	Case	I turned the toaster oven to...			Toaster temperature not hi...	
View 500gK00000BtW49QAF	Salesforce_Home	Case	Crumbs from my bagel dro...			Crumbs caught fire	

Tip Developers: To query your Case DMO, click **Copy SOQL** and copy the query to use in Developer Console or the [Data Cloud Query Editor](#). You can also query the DLO using a REST client like Postman.

Step 7: Build Your Search Index

A search index makes your text searchable so that your RAG solution can find and retrieve chunks of text that are relevant to the user's input. In this example, you create a hybrid search index to find relevant

content based on both semantic similarity and keywords.

1. In Data Cloud, select the Search Index tab, and click **New**.
2. Select **Advanced Setup** and click **Next**.
3. Select **Hybrid Search** as the Search Type and **Case** as the Source Object, then click **Next**.
4. Click **Manage Fields** and select **Description** and **Subject**, then click **Save**.
5. Click **Next** repeatedly to accept the remaining default values, and then click **Save** to create your search index.
6. Click the Search Index tab to refresh it. Your Case search index is ready when the **Search Index Last Run Status is Ready** (about 10 minutes).
7. Click the Data Model tab to see the created search index files:

Search Index Files

	Object Label	Object API N...	Category	Data Streams	Data Lake Ob...	Data Space	Type	Status
1	Case	ssot__Case_dlm	Profile	Case_Home	Case_Home	default	Standard	Ready
2	Case chunk	Case_chunk_dlm			Case chunk	default	Semantic	Ready
3	Case index	Case_index_dlm			Case index	default	Semantic	Ready
4	Static Currency Ra...	StaticCurrencyRat...	Other		Static Currency Rate...	default	Standard	Ready

- text chunks (`Case_chunk_dlm`)
- a hybrid index (`case_index_dlm`)

It's helpful to know how to inspect text chunks for debugging purposes or feature optimization. For example, chunks might reveal why an LLM is responding in unexpected ways. In Prompt Builder, you're able to view the retrieved chunks, as you'll see later in this example.

Tip Developers:

- To inspect the data chunks in the search index you created, or to ask natural language query questions, you can use the query API in Apex or the queryDataV2 endpoint in the Data Cloud Connect REST API.
- To see the configurations for all search indexes in an org, use `/ssot/search-index`.
- Searching with APIs helps you build a proof of concept solution and debug. You can also try different types of search, such as prefiltering or using a vector search, without building a retriever each time.

Step 8: Build a Retriever

A retriever is a wrapper for Einstein Search operations. You create a custom retriever in Einstein Studio to refine the search so that the retrieved content is more relevant to your use case.

Note An individual retriever can fetch data from only one search index. A search index can index only one DMO. If your feature needs to ground on data from multiple data sources, use an

ensemble retriever.

1. In Data Cloud, select the Einstein Studio tab, select **Retrievers**, and click **New Retriever**.
2. Select **Individual Retriever** and click **Next**.
3. Select **Data Cloud** and accept the default data space.
4. Select the DMO (**Case**) and search index configuration (**Case Hybrid Search**), then click **Next**.
5. For filters, accept the default (All Documents) and click **Next**.
6. For **Fields to Return**, add these three fields:
 - a. Case object's **Subject** field (**DirectAttribute > Case > Subject**)
 - b. Case object's **Description** field (**DirectAttribute > Case > Description**)
 - c. Chunk field (**RelatedAttributes > Case chunk > Chunk**)



Tip Select the field name first. The associated field label is selected automatically.

Fields to Return in the Retriever

Set Up Retriever <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Select Retriever Type <input checked="" type="checkbox"/> Define Retriever Filters (Optional) Configure Retriever Results <input checked="" type="checkbox"/> Review 	Configure Retriever Results Specify the number of results and fields to return. <p>* Number of results to return, up to 50 20</p> Fields to Return Select the fields to return. <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">* Field Label</td> <td style="width: 50%;">* Field Name</td> </tr> <tr> <td>Subject</td> <td>Case > Subject X </td> </tr> <tr> <td>* Field Label</td> <td>* Field Name</td> </tr> <tr> <td>Description</td> <td>Case > Description X </td> </tr> <tr> <td>* Field Label</td> <td>* Field Name</td> </tr> <tr> <td>Chunk</td> <td>Case chunk > Chunk X </td> </tr> </table> <p style="text-align: center;">+ Add Field</p>	* Field Label	* Field Name	Subject	Case > Subject X 	* Field Label	* Field Name	Description	Case > Description X 	* Field Label	* Field Name	Chunk	Case chunk > Chunk X
* Field Label	* Field Name												
Subject	Case > Subject X 												
* Field Label	* Field Name												
Description	Case > Description X 												
* Field Label	* Field Name												
Chunk	Case chunk > Chunk X 												

7. Click **Next**, then click **Save**. Name this retriever and create it.
8. On the Retrieval Details page, copy the **API Name**, which you'll use in the next step.
9. Click **Activate**.

Step 9 - Create a Prompt Template and Add Your Retriever

A prompt template defines the structure of the prompt that is sent to the LLM. You can add text instructions and resources, such as retrievers, Flows, customer input, or other resources. A prompt template inherits characteristics from a prompt template type, which contains hidden pre- and post-processing instructions that affect how the resolved prompt is used at runtime. In this example, you create a new prompt template based on the Answer Questions with Knowledge prompt template.

1. From Setup, in the Quick Find box, enter *Prompt Builder*, and then select **Prompt Builder**.
2. Click **New Prompt Template**.
3. For Prompt Template Type, select **Knowledge Answers**.
4. Name your prompt template (for example, *Answer Questions With Case Data*) and click **Next**.
5. Enter instructions into the prompt. Copy and paste from the following example, which comes from the *Answer Questions With Knowledge* prompt template.

```
### INSTRUCTIONS
  1. Analyze the query: Carefully read and understand the user's question or issue from the QUESTION section.
  2. Search CASE: Review the provided company CASE to find relevant information.
  3. Evaluate information: Determine if the available information in the CASE section is sufficient to answer the QUESTION.
  4. Formulate response: To generate a reply <generated_response> to the user, you must follow these rules
    a. Find the article-chunk(s) that is most relevant to answer the user query and VERBATIM extract the ID of the article to set <source_id> field in the response JSON. If you are unable to find the relevant article, set <source_id> to NONE.
    b. Use the relevant article-chunk to generate the response that exactly answers the user's question and set the <generated_response> field.
    c. If the user request cannot be answered by the case information provided, set the <source_id> to NONE and <generated_response> to "Sorry, I can't find an answer based on the available articles."
  5. Refine and deliver: Ensure your response is polite, professional, and concise.
  6. Review response: Make sure that have followed all of the above instructions, respond in the desired output format and you only strictly stick to the provided CASE only to formulate your answer.
```

Sample_Case_Retriever_1Cx_cS3a95815db

```
###
CASE:
[Insert Retriever Here]
```

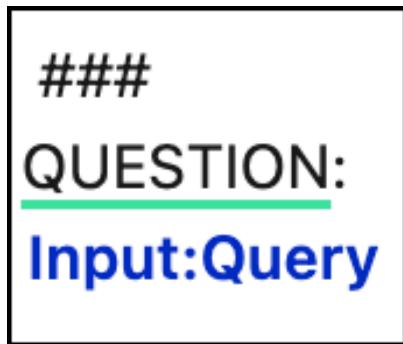
```
###
```

QUESTION:
{ !\$Input:Query }

Response:

6. Delete **[Insert Retriever Here]** and leave your cursor at that spot.
7. Click **Insert Resource**, select **Einstein Search > Case**, and add your retriever.
8. In the retriever settings panel:
 - a. For **Search Text**, select **Free Text**, then **Query**.
 - b. For **Output Fields**, select **Chunk**.
 - c. For this example, set **Number of Results** to **5**.
9. In the prompt template, delete the **InputQuery** under **QUESTION** and leave your cursor in that spot.
10. In the settings panel on the left, under **Search Parameters**, click **Search Text**, select **Free Text**, **Query**, and copy the query input (**Input:Query**). Under **QUESTION:**, paste **Input:Query**.

Input:Query



11. Save your work and then click **Activate**.

Step 10: Test Your Prompt Template

Test the prompt template you just created.

1. Click **Preview**.
2. In Preview Settings, expand **Inputs** if needed.
3. Enter a question into the Query, such as *What are some common issues with the toaster oven product?*
4. For Retriever ID, add your retriever ID. (In Einstein Studio, select Retriever, select your retriever and, on the retriever details page, copy your retriever's API name, then paste it in the Retriever ID field).
5. Click **Preview** to see the LLM's response.

Preview Shows the Prompt Request and the LLM Response

2 Resolved Prompt	3 Generated Response
<pre>### INSTRUCTIONS 1. Analyze the query: Carefully read and understand the user's question or issue from the QUESTION section. 2. Search CASE: Review the provided company CASE to find relevant information. 3. Evaluate information: Determine if the available information in the CASE section is sufficient to answer the QUESTION. 4. Language Instructions: You must respond in {language} 5. Formulate response: To generate a reply <generated_response> to the user, you must follow these rules a. Find the article-chunk(s) that is most relevant to answer the user query and VERBATIM extract the ID of the article to set <source_id> field in the response JSON. If you are unable to find the relevant article, set <source_id> to NONE. b. Use the relevant article-chunk to generate the response that exactly answers the user's question and set the <generated_response> field. c. If the user request cannot be answered knowledge provided, set the <source_id> to NONE and <generated_response> to "Sorry, I can't find an answer based on the available articles." 6. Refine and deliver: Ensure your response is polite, professional, concise and in {language} only. 7. Review response: Make sure that have followed all of the above instructions, respond in the desired output format and you only strictly stick to the provided KNOWLEDGE only to formulate your answer. ##### CASE: source_id: Chunk: Toaster oven won't start ##### Toast oven arrived broken ##### Toaster temperature not heating up enough ##### The toaster oven always burns my toast, even when I select the Light setting. ##### The toaster oven is plugged in but when I push the power button, nothing happens. Nothing lights up. There's no power.</pre>	<pre>{ "response": { "text": "Common issues with the toaster oven product include:\n1. The toaster oven will not start or power on.\n2. The toaster oven arrived broken.\n3. The toaster temperature does not heat up sufficiently.\n4. The toaster oven burns toast even when the Light setting is selected.", "source": [{ "source_id": "NONE" }] } }</pre>

- **Resolved Prompt** shows the resolved prompt that was sent to the LLM. The resolved prompt contains the chunks of data that your retriever fetched. That's RAG in action!
- **Generated Response** shows the prompt template's output that you can surface to customers.

 **Note** If you get an error, try again with the same question or a slightly different one. You can also try refreshing your browser window.

Step 11: Build an Agent that Answers Questions Using Case Knowledge

Finally, create an agent that uses your prompt template to answer questions using your case data.

 **Tip** Developers: You don't need to consume your prompt template from an action. Developers can consume it from Apex or a Flow instead.

1. Create an Agent Action
 - a. From Setup, in the Quick Find box, enter *Agentforce Assets*, and then select **Agentforce Assets**.
 - b. Click the Actions tab.
 - c. Click **New Agent Action**.
 - d. For the **Reference Action Type**, select **Prompt Template**.
 - e. For the **Reference Action**, select your prompt template. If you don't see your prompt template,

- make sure it's active.
- f. (Optional) Name your action something like *Answer Questions With Case Data*, then click **Next**.
- g. Add **Agent Action Instructions**. For example: *Answer questions that customers have about product issues. Use the provided customer cases, where the description and subject tell you what is going wrong, or how the customer is struggling.* For example: "What are some common issues with the toaster oven?"
- h. For Inputs, fill in the required fields.
Examples:

Loading Text: *Getting an answer...*

Inputs instructions: *Use the retriever that is hard coded in the prompt template.*

Query Instructions Required. A string created by generative AI to be used in the Case search.

Collect data from user: (make sure it's selected under **Query Instructions**)

Citation Mode Instructions: *Do not generate citations.*

Accept all other defaults.

- i. For Outputs, for the Prompt Response, enable **Show in Conversation**.
- j. Accept all other defaults and click **Finish**.
- k. Select the created agent action to view its details.

Agent Action Details

Agent Action API Name: AnswerQuestionsWithCaseData

Last Modified: 7/28/2025, 10:34 PM

Assigned to Active Agent: [checkbox]

Reference Action:

Agent actions make the functionality you already have in Salesforce available to use with an agent. These are the details of the action that your agent action references. Changes to the reference action can affect your agent action.

Reference Action Type	Last Modified	Last Modified By	Status
Prompt Template	7/28/2025, 09:42 PM		Active

Agent Action Configuration:

Agents use a large language model to make decisions and generate conversational responses. The instructions and settings for an agent action tell the LLM how and when to use the action.

Agent Action Label: Answer Questions With Case Data

Agent Action Instructions: Answer questions about product data.

2. Create an Agent

- From Setup, in the Quick Find box, enter *Agentforce Agents*, and then select **Agentforce Agents**.
- Click **New Agent**, select **Agentforce Service Agent**, and click **Next**.
- Deselect everything except **General FAQ**, then click **Next**.
- For company, add *A company that sells toaster ovens*, accept the other defaults, and click **Next**.
- Skip the data library and click **Create**.

Note If you see an error, wait a minute or two and check whether the agent was created. If not, try refreshing the browser window or repeating the instructions in this step.

3. Add a New Topic to Your Agent

Create a new topic to consume the action from the previous step.

- In your agent, select **New -> + New Topic**.
- For what you want this topic to do, enter *Answer questions with Case information*, and click **Next**.
- For **Classification Description**, replace the default value with something like : *This topic addresses user inquiries related to toaster oven cases and provides relevant details.*
- For **Scope**, accept the default instructions.
- For **Instructions**, replace the first instruction with: *Gather as much information as possible from the user by answering clarifying questions.*
- Delete all the other default instructions and click **Next**.
- Select the action you created earlier (**Answer Questions with Case Data**), then click **Finish**.
- Click **Activate** to activate your agent.

- i. If you see the **Agent Readiness Checklist**, click **Ignore & Activate**.
The best practice is to review and resolve any issues. However, that's not needed for our example.
- j. Test your agent. In the Conversation Preview window, ask a question such as *What are some common problems with toaster ovens?*

Test Your Agent

 Hi, I'm an AI service assistant. How can I help you?

 What are some common problems with toaster ovens?

 Common problems with toaster ovens include:

- The toaster oven not starting when the power button is pressed
- Insufficient heating of the toaster temperature
- Unexpected shutdowns during operation
- Consistent burning of toast even on the Light setting

Note that the answer is not a generic answer about all toaster ovens. Instead, it reflects the information you entered as case subjects and descriptions. It's easy to see how the LLM response is grounded in the very data source you populated.

Possible Next Steps

This example walked you through the advanced steps for setting up RAG in Data 360. From here, you can continue to explore how RAG can help you implement different use cases in your org. Consider these possibilities.

- Use the Salesforce Developer Edition org to experiment with different settings and approaches. For example, build hybrid and vector indexes and compare the results, or use experiment with different chunking strategies. To learn about all the available settings:

Task	Learning Resources
Ingest Data into Data 360	Salesforce Help (Data 360): Search for AI, Automation, and Analytics
Build a Search Index	Salesforce Help (Data 360): Manage Search Indexes
Create a custom retriever	Salesforce Help (Data 360): Retrieve Data

Task	Learning Resources
Create a prompt template that uses the retriever	Ground with Knowledge Using Retrieval Augmented Generation
Create an agent	Ground Agentforce in Your Data

- Expand the use case. For example, try ingesting the Case's status field, then filtering for resolved cases only. Or add case comments to the case records, then add that field in subsequent tasks so that the agent can use it to answer questions. Or ingest in case-related data from different sources and experiment with
- Try different use cases that, in your organization, are candidate projects for RAG implementations.
- Learn more about RAG. Consider these Trailhead modules:
 - [Retrieval Augmented Generation: Quick Look](#)
 - [Unstructured Data in Data 360](#)
 - [Search Index Types in Data 360: Quick Look](#)
 - [Hybrid Search for RAG: Quick Look](#)
 - [Knowledge Grounding for AI: Quick Look](#)
 - [Agentforce Data Library Basics](#)

Troubleshooting Knowledge Retrieval for Agents

Solve common retrieval augmented generation (RAG) issues for agents.

 **Note** For Agentforce Data Libraries, see [Agentforce Data Library Troubleshooting](#).

My agent isn't returning information that exists in the knowledge store.

You're expecting to see information that you're certain exists in the knowledge store.

- First, confirm that the information exists in the knowledge store. Use [citations](#) to identify the source information used to generate the response.
- Content strategy and quality deficiencies are the most common cause of unsatisfactory knowledge retrievals. Audit your knowledge store to identify and remedy content quality issues associated with the requested information. Look for information that's incorrect, obsolete, duplicate, overlapping, contradictory, and diffused. Identify ways to improve the clarity, focus, and organization of the information. For content optimization techniques, start with these resources:
 - Help: [Prepare Your Source Content](#)
 - Trailhead: [Grounding an Agent with Data](#)
 - 360 Blog: [10 Ways To Prep Your Knowledge Base for AI Grounding](#)
- Verify that the user has [sufficient permissions](#) to access the information. For Standard objects (including Knowledge Articles), the agent user needs permission to view the data. Otherwise, that data is omitted from the agent's response.
- If you're using [vector search](#), try [hybrid search](#) and compare retrieval results. Hybrid search can help improve your search results.

- Turn on [Enhanced Event Logs](#) to show more conversation details. Review the conversation in the enhanced event logs. Examine the user request and the retrieved content. How well did the agent recognize the user's intent? Was the user request poorly formed? Was it too specific (narrow), too broad, or too ambiguous to find the right information? How well did the agent find and retrieve the information that pertained to the user's intent?
- Use [Knowledge/RAG Quality Data and Metrics](#) to investigate retrieval quality issues and patterns. Metrics can guide your efforts to focus on the areas that can best increase answer accuracy and relevance. Context Precision scores reflect the quality of the retrieval. Faithfulness and Answer Relevance scores reflect the accuracy and relevance, respectively, of the generated response. See [About Knowledge/RAG Quality Data and Metrics](#).
- Review the chunking strategy in your search indexes, which can greatly impact retrieval quality.
 - Examine the chunks retrieved in the response. Were the right chunks retrieved? Were the chunks too small or too large? How are the chunks ranked? For hybrid search indexes, tune the ranking factor settings (see [Create a Hybrid Search Index with Advanced Setup](#)).
 - Examine the chunks in the search index, as described later in this article. To inspect the data chunks in the search index, or to ask natural language query questions, you can use the Data 360 Query Editor or any SQL tool. Is the relevant information split across multiple chunks? Is important context lost in the chunking?
 - Evaluate and adjust your chunking strategy, such as changing the chunk size or using section-aware chunking. See [Chunking Strategies](#), [Optimizing Search Indexes: Field Selection and Chunking](#), and [Enriched Indexing of Content Chunks](#) in Data 360 help.
- In Prompt Builder (or a flow), compare the retrieved chunks in the prompt with the LLM's response. What's missing in the response? Use [citations](#) to identify the sources that the LLM used to generate the response. Is an important retrieved chunk ranked too low? Consider adjusting the instructions in the LLM prompt.

My agent returns incorrect or hallucinated information.

You're seeing LLM responses that contain factually incorrect information.

- Examine the retrieved chunks. Are they semantically similar but factually wrong? Do they contain information that's obsolete, contradictory, or incorrect? Were more accurate or relevant chunks not retrieved? Address content quality issues in the knowledge store. Add context to chunks by using prepend fields (see [Optimizing Search Indexes: Field Selection and Chunking](#)) and enriched indexing (see [Enriched Indexing of Content Chunks](#)). Increase the number of retrieval results (chunks) returned to the prompt.
- Examine the retrieved chunks and the associated source content. Was the source content parsed correctly? Are headings, paragraphs, and tables intact or scattered across chunks? If the latter, switch to processing your content with [LLM-based Parsing and Preprocessing](#).
- Examine whether the LLM derived the answer from retrieved chunks or made up the information. If the latter, adjust the prompt to require citations.
- Use [Knowledge/RAG Quality Data and Metrics](#) to investigate quality issues and patterns. Faithfulness scores reflect the accuracy of the generated response.

My agent isn't responding with recently updated information.

You're seeing old information, not the latest information that you know has recently been updated.

- For large knowledge stores, building a search index can take hours. Check the job status of the search index and the status state (see [View Search Index Status and Process History](#)). Proactively monitor indexing jobs for progress and completion result (Succeeded or Failed). Use multiple search indexes separated by content type or domain.
- For hybrid search indexes, select RECENTY as the ranking factor and select the LastModifiedDate field in the Data Model Object (DMO). See [Create a Hybrid Search Index with Advanced Setup](#).
- Check the status of the Knowledge Article in Salesforce. [Archived articles](#) are sometimes still indexed, which can result in contradictory, duplicate, or obsolete information. Add [prefilters](#) to the retriever to make sure that only the active articles are returned.
- Check for errors in indexing logs. Rebuild the index if the data stream stalled.

My documents aren't being indexed at all.

Your documents aren't appearing in the search index.

- Investigate which documents are missing from the index. Examine whether file attachments for Salesforce objects are [configured for ingestion](#) (is [ContentDocument](#) included in the data source?). Review your data source configuration and permissions and address setup issues.
- Check the document file format. If it's not a [supported format](#), convert the document to a supported file format. Refer to the [file limits for unstructured data](#) in Data 360.
- Check Salesforce object permissions and change permissions if needed. Make sure that the agent user has access to the required objects and Knowledge. Check data category filters and adjust filters as needed.

Table data isn't being extracted correctly.

You're seeing errors in the extracted data.

- To avoid horizontal versus vertical detection errors, switch to processing and extracting your content by using [LLM-based Parsing and Preprocessing](#). For the Docling parser, see the blog: [Turn Hidden Data into AI-Ready Insights: How the Docling Parser Harvests Value from Unstructured Information](#).
- Examine the chunks and determine whether table information is intact or scattered across multiple chunks. If the latter, [increase the chunk size](#) or implement a [section-aware chunking strategy](#).

Multi-lingual queries aren't working.

You're getting poor agent responses to user queries submitted in different languages. For example, your knowledge store contains Spanish content and your user queries are in French and English.

- For RAG solutions involving non-English languages, make sure you're using the [multilingual-e5-large embedding model](#). This embedding model preserves semantic similarity across languages. A query in

- French can retrieve relevant articles written in Spanish. For the best results, consider using a single language for content in the knowledge store.
- Keyword search is less effective in multi-lingual solutions. If keywords are in a different language than the source content, test whether [vector search](#) performs better than [hybrid search](#).
 - Users expect responses to be in the same language as their user queries. Configured settings can affect responses. For example, instructions in a prompt template can specify to the LLM to generate a response in a specific language. To improve results in multi-lingual solutions, review supported languages and configured language settings for [agents](#), [prompt templates](#), and [Einstein Trust Layer](#).
 - LLMs and LLM versions can vary in multi-lingual support. Some perform better than others. To get the best results, test your prompts with different LLMs and LLM versions.

Other Considerations

- To help with debugging your RAG-powered solution, turn on [Enhanced Event Logs](#) to show more conversation details.
- Use [Knowledge/RAG Quality Data and Metrics](#) to investigate retrieval quality issues and patterns. Metrics can guide your efforts to focus on the areas that can best increase answer accuracy and relevance. Context Precision scores reflect the quality of the retrieval. Faithfulness and Answer Relevance scores reflect the accuracy and relevance, respectively, of the generated response. See [About Knowledge/RAG Quality Data and Metrics](#).
- If you're using [vector search](#), try [hybrid search](#) and compare retrieval results.
- If you're using a large content store, consider breaking it up into smaller, more specialized content stores. If the content store is Knowledge, use Data Categories to refine the store. For example, suppose you have 205K+ Knowledge Articles creating 2M+ chunks. If you're retrieving only ~5 chunks per query, then you're extracting only 0.00024% of the total content.
- Filters can focus searches on the most relevant information but they can also preclude relevant content from retrieval. Make sure that your prefilter configurations in prompt templates and filter settings in retrievers are optimized for retrieving the right amount of content.
- Tune your chunking setup in your search indexes to optimize retrieval quality. See [Chunking Strategies](#), [Optimizing Search Indexes: Field Selection and Chunking](#), and [Enriched Indexing of Content Chunks](#) in Data 360 help.

Use the Data 360 Query Editor to Debug Chunks

Directly inspect and troubleshoot chunks in your search indexes with the [Query Editor](#).

Find Chunks by Source Record

Examine all chunks created from a specific source (like an URL or Knowledge Article).

```
SELECT Chunk__c, ChunkSequenceNumber__c, DataSource__c, DataSourceObject__c,  
       InternalOrganization__c, KQ_RecordId__c, KQ_SourceRecordId__c,  
       RecordId__c, SourceRecordId__c  
FROM <Your_Chunk_DMO>__dlm
```

```
WHERE SourceRecordId__c = '<source_record_id>'
```

Test Vector Search Queries

Examine the retrieved chunks for a given query.

```
SELECT v.score__c AS Score, c.Chunk__c AS Chunk,
       c.SourceRecordId__c AS SourceRecordId
FROM vector_search(
    TABLE(<Your_Index>__dlm),
    'your search query here',
    '',
    10
) v
INNER JOIN <Your_Chunk_DMO>__dlm c
    ON c.RecordId__c = v.RecordId__c
ORDER BY Score DESC
LIMIT 10
```

Test Hybrid Search (Vector + Keyword)

```
SELECT c.Chunk__c, h.hybrid_score__c, h.keyword_score__c, h.vector_score__c
FROM hybrid_search(
    TABLE(<Your_Index>__dlm),
    'your query here',
    '',
    100
) h
JOIN <Your_Chunk_DMO>__dlm c
    ON h.SourceRecordId__c = c.RecordId__c
ORDER BY h.hybrid_score__c DESC
LIMIT 10
```

Debug Chunk Creation

Examine whether chunks were created for specific content.

```
SELECT COUNT(*), SourceRecordId__c
FROM <Your_Chunk_DMO>__dlm
GROUP BY SourceRecordId__c
```

Find Duplicate Chunks

```
SELECT COUNT(RecordId__c) AS duplicates, SourceRecordId__c, Chunk__c  
FROM <Your_Chunk_DMO>_dlm  
GROUP BY SourceRecordId__c, Chunk__c HAVING COUNT(RecordId__c) > 1
```

See Also

[Troubleshooting Agents](#)

[Agentforce Data Library Troubleshooting](#)

Configure Your Agent

Customize your agent so that it fits your company's use cases. Learn how to use Agentforce Builder and agent assets, including topics, actions, filters, and variables, so that you can customize out-of-the-box solutions or create your own.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

[Agent Script](#)

Get to know the language for building agents in Agentforce Builder. Whether you're working in Canvas view, Script view, or chatting with Agentforce to build and customize your agent, you're writing Agent Script. Use Agent Script to build predictable, context-aware agent workflows that don't rely solely on interpretation by an LLM.

[Building Agents in Canvas View](#)

Get to know the features of Agentforce Builder's Canvas view that help you build powerful and reliable agents with Agent Script.

[Topics](#)

A topic is a particular job an agent can do. Collectively, the topics assigned to your agent define the capabilities your agent can handle. Learn about topics in Agentforce Builder and the legacy builder.

[Agent Actions](#)

Actions are how agents get things done. Agents include a library of actions, which are the tools an agent can use to do its job. For example, if a user asks an agent for help with writing an email, the agent first selects a topic, then it launches an action that drafts and revises the email and grounds it in relevant Salesforce data.

[Create a Filter to Control Access to Topics and Actions in the Legacy Builder](#)

Create filters for topics and actions to make sure that your agent can use them in a conversation only when certain conditions are met. You can limit access based on any variable you specify. For agents on customer channels, we recommend using filters to require authentication for topics and actions that perform tasks for a user.

[Variables](#)

With variables, your agent can store and reuse values that help it with reasoning and interactions. Variables work differently in Agentforce Builder and the legacy builder.

An Agentforce Guide to Context Engineering

Context engineering is the art and science of giving your AI agent the right information, tools, and instructions to achieve its goals.

See Also

[Trailhead: Agent Customization: Quick Look](#)

[Trailhead: Agent Customization with Flows](#)

[Trailhead: Agent Customization with Prompt Templates](#)

[Trailhead: Agent Customization with Apex](#)

Agent Script

Get to know the language for building agents in Agentforce Builder. Whether you’re working in Canvas view, Script view, or chatting with Agentforce to build and customize your agent, you’re writing Agent Script. Use Agent Script to build predictable, context-aware agent workflows that don’t rely solely on interpretation by an LLM.

REQUIRED EDITIONS

Available in: Lightning Experience

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What's Agent Script?

Agent Script is the language for building agents in Agentforce Builder. Script combines the flexibility of natural language instructions for handling conversational tasks with the reliability of programmatic expressions for handling business rules. In script, you use expressions to define if/else conditions, transitions, and other logic; set, modify, and compare variables; and select topics and actions. You can build predictable, context-aware agent workflows that don’t rely solely on interpretation by an LLM. For example, you can use script to control when your agent transitions from one topic to another or when actions are run in a particular sequence (sometimes called action chaining).

Agentforce Builder gives you several ways to write Agent Script.

- You can chat with Agentforce and explain what you want your agent to be able to do (for example, “If the order total is over \$100, then offer free shipping.”). Agentforce converts your request into topics, actions, instructions, and other expressions.
- In Canvas view, Agent Script is summarized into easily understandable blocks, which you can expand to view the underlying script. You can edit your agent with the help of quick action shortcuts. Type / to add expressions for common patterns (for example, if/else conditionals) and @ to add resources (topics, actions, and variables).

- Advanced users can switch to Script view to write and edit script directly, with developer-friendly aids like syntax highlighting, autocompletion, and validation.

Developers can also use [Agentforce DX](#) to generate or retrieve a script file into their local Salesforce DX project and then work with it in Visual Studio Code. The Agentforce DX VS Code Extension fully supports the Agent Script language with standard code editing features.

What can you do with Agent Script?

Agent Script preserves the conversational skills and complex reasoning ability derived from natural language prompts, and it adds the determinism of programmatic instructions. For example, in Agent Script, you can define:

- Specific areas where an LLM is free to make reasoning decisions.
- Specific areas where the agent must execute deterministically.
- Variables to reliably store information about the agent's current state, rather than relying on LLM context memory.
- Conditional expressions (if/else) to determine the agent's execution path or LLM's utterances. For example, you can instruct the agent to speak differently to the customer based on the value of the `is_member_variable`. Or, you can deterministically specify which action to run based on the value of the `appointment_type` variable.
- Conditions under which the agent transitions to a new topic. You can deterministically transition to a new topic. Or you can expose a topic transition to the LLM as an action, allowing the LLM to decide when and whether to switch topics.

Example Agent Script

Here's a simple example of what Agent Script looks like.

```
system:  
    instructions: "You are a friendly and empathetic agent that helps customers  
with their questions."  
    messages:  
        error: "Sorry, something went wrong."  
        welcome: "Hello! How are you feeling today?"  
  
variables:  
    isPremiumUser: mutable boolean = False  
        description: "Indicates whether the user is a premium user."  
  
config:  
    agent_name: "HelloWorldBot"  
    default_agent_user: "hello@world.com"
```

```
user_locale: "en_US"

start_agent hello_world:
    description: "Respond to the user."
    reasoning:
        instructions: ->
            if @variables.isPremiumUser:
                | ensure you ask the user if they want to redeem their Premium
points
            else:
                | ensure you ask the user if they want to upgrade to Premium s
ervice.
```

Where can you learn more?

To learn more about how to build agents with Agent Script in Canvas view, see [Building Agents in Canvas View](#).

To learn more about using the language directly in Script view, see the [Agent Script Developer Guide](#).

Building Agents in Canvas View

Get to know the features of Agentforce Builder's Canvas view that help you build powerful and reliable agents with Agent Script.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

When you open an agent in Agentforce Builder, it opens in Canvas view. This view simplifies agent configuration by summarizing Agent Script into easily understandable blocks. It also provides shortcuts for common tasks.

Whether you use Canvas or Script view to build your agent, your agent's configuration and any edits you make are consistent across both views.

When you save your changes, Agentforce Builder completes validation checks in both views. Errors are underlined in Canvas view, but you can switch to Script view for more details. It's possible to make changes in Script view that make Canvas view unavailable. To switch back to Canvas view, fix the errors in Script view first.

AI Assistance

Agentforce can help with all aspects of agent building, from answering questions to creating topics and actions. Here are some ways that Agentforce can help.

- Generate Agent Script. Use natural language to explain what you want your agent to be able to do, and Agentforce can generate Agent Script for you based on your request. You can review and accept or decline its changes.
- Evaluate your instructions to improve and refine them. For example, you can ask Agentforce to make your instructions more deterministic.

To ask Agentforce for help with a specific line of instructions, hover over a line of instructions and click . Or type / on an existing line of instructions and select **Ask AI** from inline actions. To get more general help, chat with Agentforce in the Agentforce panel in Agentforce Builder.

Resources

Resources are explicit references to topics, actions, and variables. Like resources in flows and prompt templates, resources in reasoning instructions resolve like merge fields. It's almost always best to use resources to reference topics, actions, and variables in reasoning instructions to more reliably guide agent behavior. [Learn more about variables](#).

In Canvas view, access resources using the @ symbol. You can also create a custom variable that's set to an action output. Next to an action output, click **Select Variable** and then select **Create a variable**.

In this example, in reasoning instructions, explicit references to variables and actions are intermixed with natural language instructions. The `member_name` and `order_summary` variables are used in agent responses to personalize the response and control the format. The `lookup_order` and `create_return` agent actions are used to ensure that the agent runs the correct action based on different possible user requests.

Refer to the user by name  `member_name` .

Show their current order summary:  `order_summary` when conversation starts or if requested.

If they want past order info, ask for Order ID or Restaurant Name and use  `lookup_order` .

If they ask for a service agent or seem upset, use  `go_to_escalation` .

If they want to make a return, confirm Order ID and use  `create_return` .

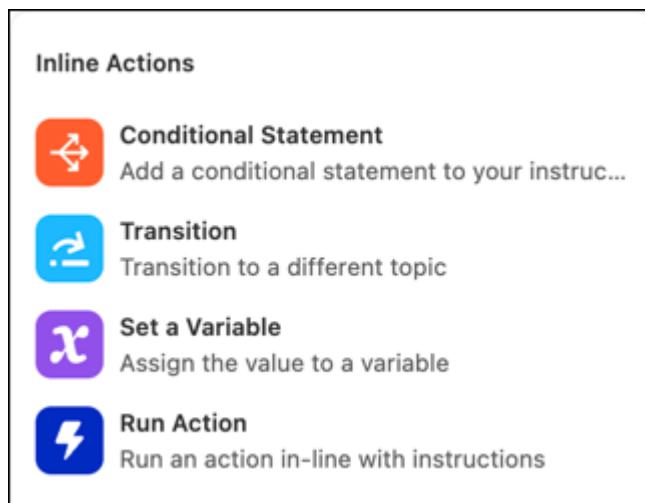
If returns are not eligible, explain politely.

Inline Actions

Inline actions are shortcuts for adding deterministic logic to your agent. When you include an inline

action in your instructions, they run before any reasoning takes place. [Learn more about how the agent uses inline actions in topic instructions.](#)

In Canvas view, access inline actions using the / symbol.



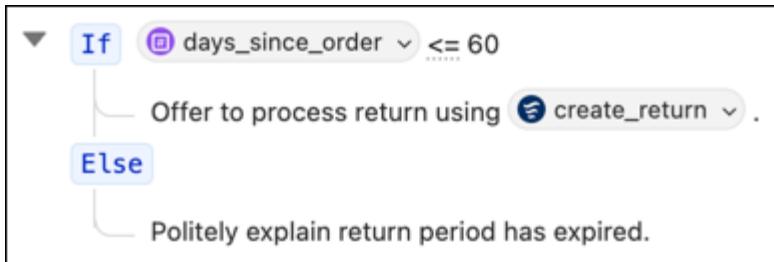
Conditional Statement

Conditional statements control your agent's behavior based on the values of one or more variables. You can think of a conditional statement as a fork in the road for your agent. If a condition is met, then the agent follows one path. Otherwise, the agent follows another. Conditional statements can be used in reasoning instructions. They contain at least one variable, one operator, and one value, but they can be more complex. Inside conditional statements, you can reference topics and actions, run actions, set variables, and transition to other topics.

- Note** When you write a conditional statement, the data type of your variable determines the required format for the value.
- Boolean: True, False
 - List: [item 1, item 2, item 3]
 - Number: 60
 - Object: {Contact}
 - String: "example@salesforce.com"

Use conditional statements to define when an agent applies a particular instruction, runs an action, sets a variable, or transitions to another topic.

In this example, in reasoning instructions, the agent evaluates the `days_since_order` variable to determine whether the customer placed the order within the last 60 days. If the value is 60 or less, the resolved prompt instructs the agent to offer to process a return using the `create_return` action. If the value is greater than 60, the resolved prompt instructs the agent to explain that the customer's order is outside of the return period.

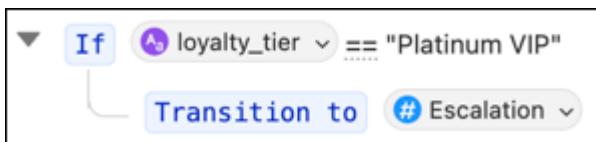


Transition

Transitions give you control over topic routing by defining when an agent moves to another topic. If at any point in the reasoning instructions the agent executes a transition to another topic, the agent redirects the conversation before the instructions are resolved and any reasoning occurs.

In actions available for reasoning, use utilities to transition or escalate instead of the inline action.

In this example, in the reasoning instructions, the agent evaluates the value of the `loyalty_tier` variable and transfers the conversation directly to a representative via the `Escalation` topic if the customer is a Platinum VIP member. Otherwise, the agent continues the conversation with the customer.



Set a Variable

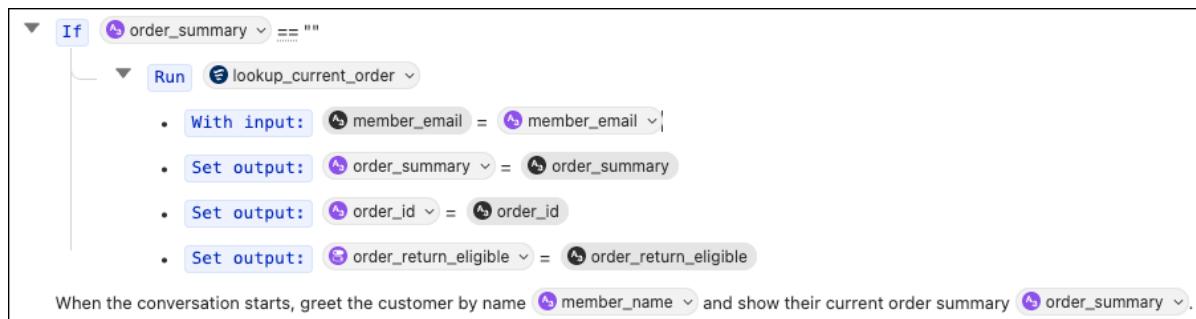
Set a variable to a value. Setting a variable is useful when you want to store values that you plan to reuse in some way, such as creating a conditional based on the variable, using the variable as an input to an action in a different topic, or using the variable in a response to a user. You can also set a variable to clear the value of a variable when you enter a new topic.

- ✓ **Note** When you set a variable, the data type of your variable determines the required format for the value.
 - Boolean: True, False
 - List: [item 1, item 2, item 3]
 - Number: 60
 - Object: {Contact}
 - String: "example@example.com"

When you run an action in instructions, you must manually set variables for the inputs and outputs because the action is run before any reasoning takes place. The action uses the set

variable's value as input, or stores the output value in the set variable. When you run an action in actions available for reasoning, setting variables is optional, but can be useful when you want to require the agent to use one action's output as input to another action. Often, your agent can determine the best input for an action. In actions available for reasoning, use the utility for setting a variable instead of the inline action.

In this example, in reasoning instructions, the agent runs the `lookup_current_order` action to fill the `order_summary` variable when the variable is empty. The `order_summary` variable is set to the `order_summary` output, so when the agent runs the action, the value of the `order_summary` output is stored in the `order_summary` variable. In the following instruction, the variable is referenced to include the customer's order summary in the agent's initial response.



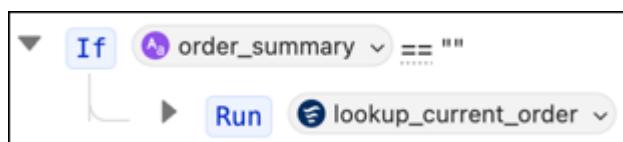
Run an Action

Running an action deterministically runs an agent action. In reasoning instructions, run an action to complete a prerequisite task or gather information to give your agent necessary context.

- (checkmark) **Note** When you run an action in instructions, you must manually set variables for the inputs and outputs because the action is run before any reasoning takes place.

In actions available for reasoning, use follow-up actions to run an action instead of the inline action.

In this example, in reasoning instructions, running an action is included in a conditional statement. If the `order_summary` variable doesn't already contain a value from earlier in the conversation, the agent uses the `lookup_current_order` action to fill the variable. Including this conditional statement in the reasoning instructions ensures that the agent always has access to the order summary before reasoning.



Features in Actions Available for Reasoning

Utilities

Utility types include transitions to set topics, escalations to a representative, or setting a variable. Create a utility and add it to your actions available for reasoning to make this functionality available for your agent to select during reasoning. After you add a utility to your actions available for reasoning, you can use a resource to reference it as an action and other inline actions in reasoning instructions to tell your agent how to use it.

This is what a transition utility looks like in Canvas view.



Unlike traditional agent actions, any utilities you add in actions available for reasoning don't show up in your topic's actions section in the Explorer panel. Currently, you can only reference utilities in Script view.

Filters (Make this action available when:)

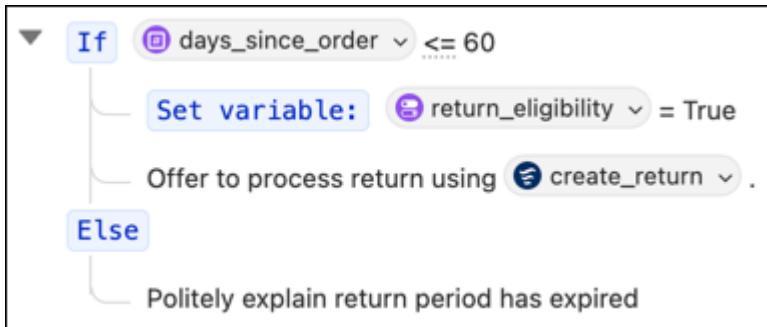
Filters ensure that your agent can use a topic or action only when one or more conditions are met.

In this example, in the actions available for reasoning, a filter has been applied to the `create_return` action. The action is only available when an order is within the return window (`return_eligibility` variable equals True).



To determine whether the customer's order meets the filter conditions, in reasoning instructions, the agent evaluates the `days_since_order` variable to determine whether the customer placed the order within the last 60 days. If the value is 60 or less, the agent sets the value of the

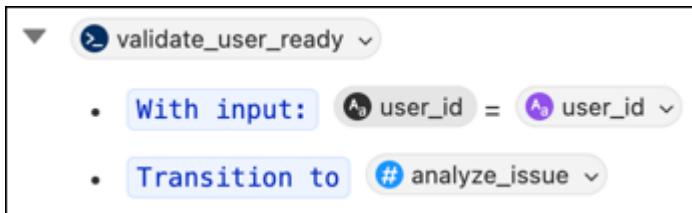
`return_eligibility` variable to True, which meets the filter conditions for access to the `create_return` action. Then the agent is able to offer to process a return.



Follow-Up Actions (After this action is run:)

Follow-up actions define steps that your agent takes after it chooses and runs an action during its reasoning process. Follow-up actions can include saving outputs to variables, transitioning to a different topic, or running another action.

In this example, in actions available for reasoning, when the agent runs the `validate_user_ready` action as part of agent reasoning, the agent always transitions from the current topic to the `analyze_issue` topic.



Keyboard Shortcuts

Quickly navigate Agentforce Builder's Canvas view with these keyboard shortcuts for macOS and Windows.

Action	MacOS	Windows
Select a line	Command+A	Ctrl+A
Select a reasoning block	Command+A+A	Ctrl+A+A
Copy	Command+C	Ctrl+C
Cut	Command+X	Ctrl+X
Paste	Command+V	Ctrl+V
Insert a resource	@	

Action	MacOS	Windows
Insert an inline action	/	

Topics

A topic is a particular job an agent can do. Collectively, the topics assigned to your agent define the capabilities your agent can handle. Learn about topics in Agentforce Builder and the legacy builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type.](#)

Topics

A topic is a job an agent can do. Learn about the parts of a topic and how to use them to define an agent's logic, reasoning, and conversational capabilities.

Topics in the Legacy Builder

An agent topic is a particular job an agent can do and an essential element of an agent's reasoning. A topic contains actions, which are the tools available for the job, and instructions, which tell the agent how to make decisions. Collectively, the topics assigned to your agent define the capabilities your agent can handle. Salesforce provides a library of standard topics for common use cases, and you can create custom topics to meet your users' specific business needs.

Topics

A topic is a job an agent can do. Learn about the parts of a topic and how to use them to define an agent's logic, reasoning, and conversational capabilities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type.](#)

A topic is a particular job an agent can do. Collectively, the topics assigned to your agent define the capabilities your agent can handle. Topics contain instructions, which control agent logic and guide agent reasoning, and actions, which are the tools available for the agent to use.

The parts of a topic include a name, description, reasoning instructions, reasoning actions, and agent actions.

Topic Field	What It Is	How It's Used
Name and Description	<p>The topic name is the API name of the topic. It's usually 2-3 words that describe what the topic does in plain language.</p> <p>The description is 1-3 sentences that describe what a topic does and the types of user requests that should be classified into this topic. In other words, the description describes what user messages should trigger this topic.</p>	<p>These fields are used along with a special topic, the Topic Selector, to determine when to use a topic in a conversation. See Topic Classification and Routing.</p> <p>The agent compares the names and descriptions of all of the topics assigned to the agent to the user's question or request and recent conversation history. Based on that context and the instructions in the Topic Selector, the agent selects the best match.</p>
Reasoning Instructions	<p>Reasoning instructions are the guidelines that tell your agent how to handle conversations in the context of the topic, your business case, and the conversation in general. Instructions contain a combination of programmatic logic (written in Agent Script) and natural language prompts. Logic strictly defines your agent's workflow and business rules. Prompts more flexibly guide your agent's conversational skills.</p>	<p>Reasoning instructions are used to create the prompt that's sent to the LLM.</p> <p>After the agent selects a topic, it begins resolving the reasoning instructions in order, executing any logic along the way to help the agent reason more accurately and reliably. See How Topic Instructions are Resolved to Build a Prompt.</p> <p>When the agent reaches the end of the logic, the agent sends the resolved prompt, including any natural language instructions, to the LLM to start the reasoning process.</p>
Actions Available for Reasoning (Reasoning Actions)	<p>Actions available for reasoning (sometimes called reasoning actions) are the actions an agent is allowed to take during reasoning with the LLM. They include references to traditional agent actions, such as Answer Questions with Knowledge. But they can also include utilities, which include transitions to another topic, setting variables, or escalations to a representative.</p> <p>In reasoning actions, you can define filters to control when an action can be used. You can also add logic after an action to</p>	<p>Reasoning actions are sent to the LLM along with the prompt created from the reasoning instructions. The LLM chooses which actions and utilities to run based on the user's message, the recent conversation history, the resolved reasoning instructions, and any logic defined in the reasoning actions.</p>

Topic Field	What It Is	How It's Used
	chain actions together in sequence.	
Actions Assigned to the Topic	<p>In addition to reasoning actions, a topic includes a list of all of the agent actions assigned to the topic. Think of this as a list of all the actions relevant to the topic's use case, including the name and description of the action, the list of inputs and outputs, and the reference to the Salesforce functionality the agent action calls to get information or perform a task (such as a flow or prompt template). In the Explorer panel in Agentforce Builder, this appears as the Actions section nested under a topic.</p>	<p>The list of agent actions defines the agent actions that are available to be used in a topic, but the actions aren't automatically included in the agent's logic or reasoning.</p> <p>To use an agent action in a conversation, reference it in the topic.</p> <ul style="list-style-type: none"> • To run an action deterministically, before any reasoning takes place, add the action to the topic's reasoning instructions. • To make an action available for the LLM to select during reasoning, add the action to the topic's reasoning actions.

Topic Classification and Routing

Learn more about the Topic Selector and how to customize it to control how your agent selects topics in a conversation.

How Topic Instructions are Resolved to Build a Prompt

Learn about how an agent executes programmatic expressions in a topic's reasoning instructions to prepare for reasoning.

Manage Agent Topics

Add and remove topics from your agent. Create custom topics. Manage topics in the asset library.

Topic Classification and Routing

Learn more about the Topic Selector and how to customize it to control how your agent selects topics in a conversation.

REQUIRED EDITIONS

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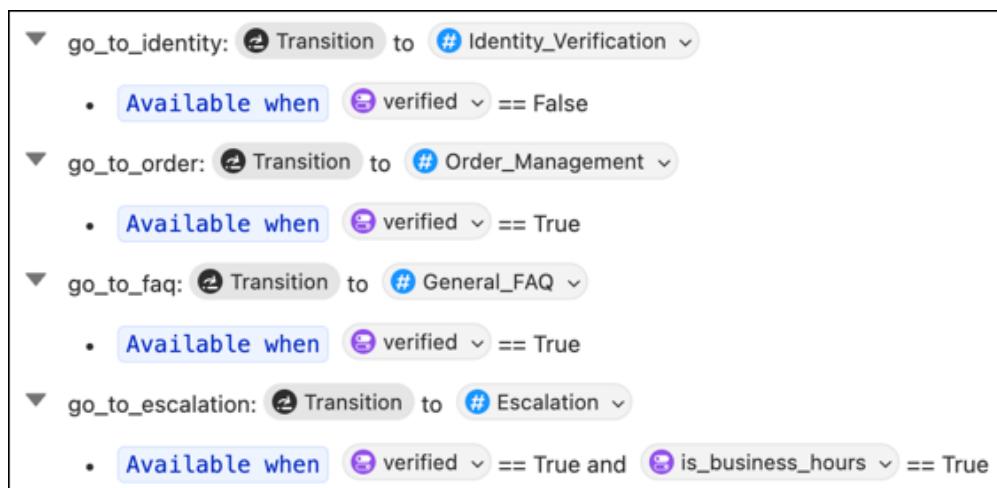
When you create an agent, a special topic called the Topic Selector is added to your agent and is defined as the starting topic for every agent conversation. By default, the agent uses this topic for topic classification, which is the process of selecting the most relevant topic based on what the user wants to

do and the jobs that the agent can do. Transitions to all of the topics in your agent are added to the Topic Selector's reasoning actions, which makes them available in the agent conversation. The agent compares the recent conversation history, including the user's most recent message, to the names and descriptions of all of the topics in the Topic Selector's reasoning actions to select the best match.

You can edit the Topic Selector just like any other topic, so you can customize [its reasoning instructions and actions](#) to set initial variables and add logic to control your agent's topic classification and routing.

- Add conditions, actions, and variables to drive classification to particular topics.
- Exclude a topic from classification based on filters (Make this action available when:).
- Remove references to a topic if you want the topic to be accessible only via transitions from other topics.

You can use filters and variables to control access and routing to topics. For example, you can add filters based on a variable to ensure that certain topics are available only to verified customers. In this example, conversations are routed based on the verified variable in reasoning actions. The Order Management, General FAQ, and Escalation topics are available only when the customer is verified (verified equals True). If the customer isn't verified (verified equals False), the conversation is routed to the Identify Verification topic.



By default, the Topic Selector is defined as the starting topic in your agent's Agent Script. In other words, this is the topic that uses the 'start_agent' prefix instead of the 'topic' prefix.

```

83   start_agent topic_selector:
84     description: "Welcome the user and determine the appropriate topic based on user input"
85
86     reasoning:
87       actions:
88         go_to_escalation: @utils.transition to @topic.escalation
89
90         go_to_off_topic: @utils.transition to @topic.off_topic
91
92         go_to_ambiguous_question: @utils.transition to @topic.ambiguous_question
93
94         go_to_order_management: @utils.transition to @topic.Order_Management
  
```

However, you can define another topic as the starting topic instead. You can choose to use the Topic Selector to move to topic classification later in the conversation, or you can remove the Topic Selector from your agent altogether if you want to control topic routing differently.

How Topic Instructions are Resolved to Build a Prompt

Learn about how an agent executes programmatic expressions in a topic's reasoning instructions to prepare for reasoning.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

Reasoning instructions are the guidelines that tell your agent how to handle conversations in the context of the topic, your business case, and the conversation in general. They contain a combination of programmatic logic and natural language prompts, where logic reliably handles your agent's general workflow and business rules and prompts more flexibly guide your agent's conversational skills. You can think of logic in reasoning instructions as anything the agent must do before reasoning, and natural language prompts as anything the agent should take into account during reasoning.

After an agent selects a topic, it begins resolving the topic's reasoning instructions from top to bottom, in the order that they're written. This process can include:

- Replacing references to resources (like variables or actions) with actual values, including manually setting values
- Running any inline actions and inserting the results into the instructions
- Evaluating and applying any conditional statements

At this stage in the topic's execution, no reasoning takes place, so the agent doesn't rely on an LLM yet. Every logical expression in reasoning instructions is run, run exactly as written, and run in the order that it's written.

If at any point in the reasoning instructions the agent executes a transition to another topic, the agent redirects the conversation before the instructions are resolved and any reasoning occurs. Otherwise, when the agent reaches the end of the reasoning instructions, it injects the resolved reasoning instructions into a prompt to send to the LLM and kick off the reasoning process. The prompt includes:

- Agent-level instructions, which apply to every agent interaction
- The recent conversation history, including the user's most recent message
- The resolved topic reasoning instructions
- [Reasoning actions](#) associated with the topic, which are the actions (including agent actions) an agent is allowed to take during its reasoning process

The agent uses the LLM to analyze the available information in the prompt and determine its next steps.

Example

An agent is chatting with a customer who is expecting a delivery. The customer's order ID is 1234 and the estimated delivery date is February 10, 2026, which is outside of the expected delivery window.

Based on the customer's message, the agent selects a topic that contains the following reasoning instructions.

```
reasoning:  
  instructions:->  
    If @variables.updated_delivery_date == None  
      run @actions.get_delivery_date  
      with order_ID=@variables.order_ID  
      set @variables.updated_delivery_date=@outputs.delivery_date  
  
      | Tell the user that the expected delivery date for order number {@variables.order_ID} is {@variables.updated_delivery_date}.  
  
    If @variables.is_late == None  
      run @actions.check_if_late  
      with order_ID=@variables.order_ID  
      with delivery_date=@variables.updated_delivery_date  
      set @variables.is_late = @outputs.is_late  
  
    if @variables.is_late == "true":  
      | Apologize to the customer for the delay in receiving their order.
```

To construct a prompt, Agentforce resolves the reasoning instructions line by line, following these steps.

1. Run the action `get_delivery_date` to get an expected delivery date.
2. Set the variable `updated_delivery_date` to the value of `outputs.delivery_date`, which was returned by the action. In this case, the value is set to `February 10, 2026`.
3. Add this instruction to the prompt: `Tell the user that the expected delivery date for order number 1234 is February 10, 2026.`
4. Run the `action check_if_late`.
5. Set the `variable is_late` to the value of `outputs.is_late`, which was returned by the action. In this case, the variable is set to `"True"`.
6. Check whether the value of if `@variables.is_late == "True"` to determine whether the order is late.
7. Because the order is late, add this instruction to the prompt: `Apologize to the customer for the delay in receiving their order.`

These are the resolved reasoning instructions that are added to the prompt.

Tell the user that the expected delivery date for the order number 1234 is February 10, 2026.

Apologize to the customer for the delay in receiving their order.

The prompt is sent to the LLM to determine the agent's next steps and generate a response.

Manage Agent Topics

Add and remove topics from your agent. Create custom topics. Manage topics in the asset library.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

[Add a Topic to Your Agent from the Asset Library](#)

Add a standard topic to your agent to start from an example built to handle a common business use case. Or add a custom topic that you built yourself. When you add a topic to your agent from the asset library, a copy of the topic is added to your agent.

[Create a Custom Topic](#)

You can create a custom topic from the asset library or from within an agent in Agentforce Builder. When you create a topic from the asset library, it's available to add to multiple agents and versions. When you create a topic from within an agent in Agentforce Builder, it's available only to that agent.

[Remove a Topic from Your Agent](#)

Make sure that your agent continues to deliver helpful and relevant responses by removing topics you no longer need.

[Delete a Topic from the Asset Library](#)

Delete a custom topic from the asset library when you no longer want it to be available to add to your agents. You can't delete a standard topic from the asset library.

Add a Topic to Your Agent from the Asset Library

Add a standard topic to your agent to start from an example built to handle a common business use case. Or add a custom topic that you built yourself. When you add a topic to your agent from the asset library, a copy of the topic is added to your agent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To add a topic to an agent:

Manage AI Agents AND the required permissions
for your agent type

To make changes to your agent, it must be in a draft state. If you want to make changes to a committed agent, [create a new draft](#).

1. From the Agents list in the Agentforce Studio app, open the agent you want to add a topic to.
2. If there are multiple versions of your agent, from the header in Agentforce Builder, select the agent version you want to edit.
3. From the Explorer panel, hover over Topics and click .
4. Select **Add from Asset Library**.
5. Select one or more topics to add to your agent.
6. Click **Add to agent**.

A copy of each of the topics you selected is added to your agent, and you can edit this copy. Any changes you make to the topic apply only to this agent version and don't affect other agents or the topic in the asset library.

If you use the Topic Selector to control topic routing and classification, each topic you add to your agent is automatically added to the Topic Selector's reasoning actions.

When you add a topic to an agent, customize the topic for your business needs.

- Review and customize the topic's instructions and reasoning actions.
- Review and customize any agent actions included with the topic, including the underlying flows, prompt templates, or other reference actions.
- If you use the Topic Selector, specify any logic or instructions for routing conversations to the topic.

Create a Custom Topic

You can create a custom topic from the asset library or from within an agent in Agentforce Builder. When you create a topic from the asset library, it's available to add to multiple agents and versions. When you create a topic from within an agent in Agentforce Builder, it's available only to that agent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create a custom topic:

Manage AI Agents AND the required permissions
for your agent type

Create a Custom Topic in Agentforce Builder

When you create a topic from an agent in Agentforce Builder, it's available only to that agent. Any changes you make apply only to this agent version. To make a topic available to add to other agents and agent versions, create it in the asset library instead.

To make changes to your agent, it must be in a draft state. If you want to make changes to a committed agent, [create a new draft](#).

 **Note** These steps cover how to create a topic in Canvas view, but there are a few ways to create a topic in Agentforce Builder.

- Ask Agentforce to create a topic for you. Provide the details about the job you want your agent to be able to do, and Agentforce generates a topic and actions for you. You can accept or decline any changes.
- Create a topic in Script view.

1. From the Agents list in the Agentforce Studio app, open the agent you want to add a topic to.
2. If there are multiple versions of your agent, from the header in Agentforce Builder, select the agent version you want to edit.

3. From the Explorer panel, hover over Topics and click .

4. Select **Create new topic**.

5. Give the topic a name, and then click **Create and Open**.

Your custom topic is added to your agent. If you use the Topic Selector to control topic routing and classification, your topic is added to the Topic Selector's actions available for reasoning.

6. Edit your description, reasoning instructions, and actions available for reasoning. Make sure to save your changes.

[Learn more about the parts of a topic](#).

7. Optionally, add an action to your topic.

- a. From the Explorer panel, make sure your topic is expanded.

- b. Hover over Actions and click .

- c. Add one or more actions from the asset library, or create a custom action.

When you add an action from the asset library, always review and customize the action to meet your business needs, including the underlying flow, prompt template, or other reference action.

- d. Reference the action in your topic's reasoning instructions, actions available for reasoning, or both.

Your topic is available only in this agent version and isn't available in the asset library. Any changes you make to the topic apply only to this agent version and don't affect other agents. If you change the name of your topic, manually update any references to the topic in the Topic Selector or any other topics.

Create a Custom Topic from the Asset Library

Create a custom topic from the asset library to make your topic available to multiple agents and versions. Then add it to one or more agents.

1. From Setup, enter *Agentforce Assets*, and then select **Agentforce Assets**.
2. From the Topics tab, click **New Topic**.
3. Complete all required fields. You must add at least one topic instruction. Optionally, to use AI to evaluate your topic fields and suggest improvements, click . Then click **Next**. Currently, topics created in the asset library follow the style of topics in the legacy Agentforce Builder. For information about the parts of a topic and best practices for topic instructions, see [Topics in the Legacy Builder](#). The topic is supported for agents created in either builder and can be customized after you add it to an agent.
4. Select the actions from the asset library that you want to add to your topic, and then click **Finish**.

Your topic is available in the asset library. To use your topic, [add it to an agent](#).

When you add a topic to an agent from the asset library, a copy of the topic is added to your agent, and you can edit this copy. Any changes you make to the topic apply only to this agent version and don't affect other agents or the topic in the asset library.

Any changes you make to the topic in the asset library aren't synced to any copies of the topic you've added to agents. To apply changes made to a topic in the asset library to an agent, add the updated topic to the agent.

Remove a Topic from Your Agent

Make sure that your agent continues to deliver helpful and relevant responses by removing topics you no longer need.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To remove a topic from an agent:

Manage AI Agents AND [the required permissions for your agent type](#)

To make changes to your agent, it must be in a draft state. If you want to make changes to a committed agent version, [create a draft](#).

 **Note** These steps cover how to remove a topic from an agent in Canvas view, but there are a few ways to remove a topic in Agentforce Builder.

- Ask Agentforce to remove a topic for you. You can accept or decline any changes.
- Remove the topic in Script view.

1. From the Agents list in the Agentforce Studio app, open the agent you want to remove a topic from.
2. If there are multiple versions of your agent, from the header in Agentforce Builder, select the agent version you want to edit.
3. From the Explorer panel, under Topics, expand the topic you want to remove from your agent.
4. Hover over the topic name and click  . Then click **Delete**.
5. Delete any references to the topic from other topics, including the Topic Selector.
6. Save your changes.

The topic and any associated actions are removed from your agent, and any customizations you made to the topic are deleted. If you added the topic to your agent from the asset library, an independent copy of that topic was added to your agent. Removing the topic from your agent doesn't delete the topic from the asset library.

Delete a Topic from the Asset Library

Delete a custom topic from the asset library when you no longer want it to be available to add to your agents. You can't delete a standard topic from the asset library.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To delete a topic:

Manage AI Agents AND the required permissions
for your agent type

1. From Setup, enter *Agentforce Assets*, and then select **Agentforce Assets**.
2. From the Topics tab, click the dropdown menu next to the topic you want to delete. Then select **Delete**.

Your topic is deleted from the asset library. Any actions included in the topic aren't automatically deleted from the asset library. If you added the topic to an agent from the asset library, an independent copy of that topic was added to the agent. Deleting the topic from the asset library doesn't remove the topic or any of its associated actions from agents it was added to.

Topics in the Legacy Builder

An agent topic is a particular job an agent can do and an essential element of an agent's reasoning. A topic contains actions, which are the tools available for the job, and instructions, which tell the agent how to make decisions. Collectively, the topics assigned to your agent define the capabilities your agent can handle. Salesforce provides a library of standard topics for common use cases, and you can create custom topics to meet your users' specific business needs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

Parts of a Topic: Get to know the topic fields and other elements that guide the agent's reasoning and conversation. Plus, explore best practices and examples.

How a Topic Works: Learn more about how the reasoning engine uses topics and walk through an example.

When to Create a Topic: Consider best practices for whether to create a custom topic from scratch or add a standard topic from the asset library.

Parts of a Topic

A topic includes a [name](#), [classification description](#), [scope](#), [instructions](#), and [actions](#).

Name

The API name of the topic. 2-3 words that describe what the topic does in plain language.

An agent uses the topic name to determine when to use a topic in a conversation. The agent compares the topic name and classification description to the user's question or request, including the recent conversation history. Then the agent selects the best match.

When naming a topic, keep these best practices in mind.

- Think about a particular job that the agent can do or an area of specialization or expertise.
- Use plain language that users are likely to use and understand, not technical terms. This makes it easier for the agent to match a user's question or request to a relevant topic.
- Review other topics that you've assigned to your agent to ensure that your topic names are distinct and don't overlap.

Example Topic Names

Less Effective	more effective
Topic Name: v1_CustomerInfo Explanation: The topic name is too general to provide the agent with enough context to know how and when to use this topic. The agent also doesn't know what "v1" means in the context of the topic name.	Topic Name: Account_Management Explanation: The topic name more specifically describes the questions and requests that the topic can handle and uses plain language that the agent is more likely to understand.

Less Effective	more effective
<p>Topic Name: Help</p> <p>Explanation: The topic name is too general to help the agent make decisions. For example, any request for help could be classified to this topic, including requests the topic can't handle. It's also possible that specific requests for technical support won't be classified to this topic.</p>	<p>Topic Name: Technical Support</p> <p>Explanation: The topic name specifies the type of help that the agent can provide and more precisely defines the scope of the topic. The agent is more likely to select this topic for relevant user questions and requests.</p>

Classification Description

1–3 sentences that describe what a topic does and the types of user requests that should be classified into this topic. In other words, the classification description describes what user messages should trigger this topic.

An agent uses the classification description to determine when to use a topic in a conversation. The agent compares the topic name and classification description to the user's question or request, including the recent conversation history. Then the agent selects the best match.

When writing a topic's classification description, keep these best practices in mind.

- Describe the full range of questions and requests this topic should handle.
- Think about the ways that users ask for this type of help and include specific keywords and phrases customers typically use. Use plain language that your users are likely to use and understand, not technical terms. This makes it easier for the agent to match a question or request to a relevant topic.
- Review other topics that you've assigned to your agent to ensure that your classification descriptions are distinct and don't overlap.

Example Classification Descriptions

Less Effective	More effective
<p>Classification Description: Handle order-related questions.</p> <p>Explanation: An agent doesn't necessarily understand what "order-related questions" are without additional business context, so the classification description is too general to help the agent match a customer question or request to the topic.</p>	<p>Classification Description: Answer questions related to orders, shipping status, delivery times, or tracking. Help with finding order details, changing or canceling orders, and addressing order-related concerns.</p> <p>Explanation: The classification description lists specific scenarios customers might ask about, including key terms customers are likely to use themselves. It also details the range of order-</p>

Less Effective	More effective
<p>Classification Description: Verify before handling payment issues.</p> <p>Explanation: The classification description doesn't explain what information the agent is supposed to verify or how to verify it. The agent also doesn't necessarily understand what "payment issues" are without additional business context.</p>	<p>related tasks the topic can handle.</p> <p>Classification Description: Verify the customer before proceeding to check payment status, obtaining payment information or updating their payment method.</p> <p>Explanation: The classification description better describes the verification task and redirects the agent to a different topic. It also provides examples of payment-related tasks that involve sensitive information and require the verification step.</p>

Scope

A specific job description that sets boundaries for your agent.

After an agent selects a topic, the scope tells the agent what it can and can't do with a topic.

When writing a topic's scope, keep these best practices in mind.

- Think about how you would explain a job to a new employee.
- Specify what your agent can do with the topic ("Your job is to...") and what your agent shouldn't do with the topic ("You can't..., "Never..."). Explicitly defining your agent's capabilities and limits makes it more likely that your agent won't try to handle user questions and requests that aren't relevant or appropriate for the topic.
- When specifying your agent's boundaries, use simple, unambiguous language to minimize the risk of misunderstanding.

Example Scope

Less effective	More effective
<p>Scope: Help with login problems.</p> <p>Explanation: The scope doesn't provide any specific information, guidelines, or examples about what the agent should or shouldn't do with the topic.</p>	<p>Scope: Your job is only to help customers who cannot log in with resetting their password or looking up their username. You cannot update account information or modify permissions.</p> <p>Explanation: The scope uses explicit language to specify the tasks the agent can handle with the topic as well as the tasks the agent shouldn't attempt to handle with the topic.</p>

Instructions

Guidelines that tell your agent how to handle conversations in the context of the topic, your business case, and the conversation in general. Each instruction is a single topic-specific guideline. Each instruction field supports up to 131,072 characters, but for best performance, we recommend simpler, shorter instructions where possible.

! **Important** Instructions are nondeterministic and rely on an LLM for interpretation. Don't use topic instructions to handle critical business logic that must be consistently enforced, such as complex calculations, sensitive information processing, or multistep operations that require a specific sequence. Instead, build these requirements into the functionality of an agent action. For example, instead of adding the instruction "Don't refund an order unless it was within 30 business days," create a flow-based agent action that assesses the criteria for issuing a refund.

After an agent selects a topic, it uses topic instructions, along with the names and instructions of the associated actions, to decide what actions to run, the sequence of steps the agent should follow, and how the agent should format its responses. The agent also uses topic instructions to understand how to handle exceptions, such as when to ask for more information or when to transfer the conversation to a representative.

Topic instructions are so important to agent decision-making, behavior, and responses that we couldn't fit all of the best practices on this page. See [Best Practices for Topic Instructions](#) to learn how to use instructions to guide the agent conversation, help your agent select appropriate actions, define the format and tone of your agent's responses, and establish clarification or escalation strategies when information is ambiguous.

Example Topic Instructions

Less effective	More effective
<p>Instruction: Get the customer's order details.</p> <p>Explanation: The instruction doesn't give the agent any information about how or when to get the customer's order details. The agent also may not know what order details mean in this context. So the agent won't consistently capture the necessary information at the right time in the conversation or run related actions.</p>	<p>Instruction: If a customer asks for the status of an order, always offer all options to look up the status using either their email address, order date, or the order ID.</p> <p>Explanation: The instruction is specific about when the agent should look up order information and what information to look up. It uses language that's similar to the names of the actions the agent can use for the task paired with the absolute term "always," so the agent is more likely to consistently run one of these actions at the right time in the conversation.</p>

Less effective	More effective
<p>Instruction: Use knowledge for product questions.</p> <p>Explanation: The instruction tells the agent to use knowledge to respond to product questions, but doesn't tell the agent when or how. The agent also may not know what product questions mean in this context.</p>	<p>Instruction: For questions about product features, first identify which specific product the customer is asking about. Then use the Answer Questions with Knowledge action with the exact product name to retrieve accurate information.</p> <p>Explanation: The instruction provides a clear sequence of steps in a single instruction, so the agent is more likely to follow them in order. The instruction also explains how to use knowledge to generate a helpful response by identifying the action the agent should run by name, specifying information to use as input for that action, and specifying how to collect that information.</p>
<p>Instruction: Check if customers need help.</p> <p>Explanation: The instruction is intended to get the agent to ask a follow-up question, but it doesn't tell the agent when it should follow up or give the agent enough information to generate a context-appropriate question.</p>	<p>Instruction: After providing information on shipping status, always ask if the customer needs help with anything else related to their order.</p> <p>Explanation: The instruction describes when the agent should ask a follow-up question and provides more details about the expected content of the question.</p>

Actions

In addition to these fields, a topic contains actions that are relevant to the topic's use case. Each action in a topic is a task that your agent can perform when that topic is selected in the conversation. For example, an Order Management topic can contain:

- Get Order by Order ID
- Get Order by Email Address
- Look Up Return Status
- Create Return Label

How a Topic Works

When an agent is triggered, or when a user enters a question or request in an agent conversation, an agent compares user's input to the names and classification descriptions of all of the topics assigned to it. The agent then classifies the task or utterance into the most relevant topic. Based on the selected

topic's actions and instructions, the agent can launch one or more actions. Or if the agent is chatting with a user, the agent can prompt the user for additional information (for example, a clarifying question or the required input for an action). To learn more about this process, see [How Agents Created in the Legacy Builder Work](#).

Let's look at an example password reset topic to see how each field guides the agent conversation.

Example Topic

Topic Element	
Name	Password Reset
Classification Description	Assist customers who have forgotten passwords, can't log in, need credential resets, are locked out, or experiencing login problems. Help users change passwords or recover account access.
Scope	Your job is only to help customers reset passwords or recover usernames. You can verify identity via email/phone and initiate password resets. You cannot access account details beyond verification or modify any customer information other than passwords.
Instructions	<p>Instruction: Ask which verification method the customer prefers (email or phone) before proceeding with identity verification.</p> <p>Instruction: Use Verify Customer Email or Verify Customer Phone action based on customer preference. Don't attempt password reset until verification succeeds.</p> <p>Instruction: After verification, explain the reset process: "I'll send a secure reset link to your email that expires in 24 hours."</p> <p>Instruction: Use Security Question Verification only if the customer can't access their registered email/phone.</p> <p>Instruction: After completing a reset, ask if they need help with anything else related to account access.</p>
Actions	Verify Customer Email: Verifies identity by

Topic Element	
	matching email to an account. Returns verification status and customer ID if successful.
	Verify Customer Phone: Verifies identity by sending a code to the customer's phone. Use when email verification isn't possible.
	Send Password Reset Email: Sends a 24-hour expiry reset link to verified email. Use only after successful verification.

First, the agent matches the customer's message to the Password Reset topic because the topic name is related to login details and the classification description mentions "forgotten passwords," "need credentials," and "login problems."

Next, the agent checks the customer's request against the topic's scope. Although the customer asked for their login details, the scope prohibits the agent from accessing or modifying account details. Instead, the agent offers to reset the customer's password.

The agent follows the instructions to first verify the customer's identity by the customer's preferred verification method. In this case, the customer prefers the email method, so the agent uses the Verify Customer Email action.

At this point, you've seen how the agent uses all of the parts of a topic. But let's continue the conversation because the agent hasn't resolved the customer's request just yet. Next, the user receives the verification email and successfully completes the process. The agent then follows the instructions to explain the reset process and use the Send Password Reset Email action.

The customer completes the password reset process, so the agent follows the final instruction to ask if the customer needs anything else related to account access. The customer responds that this has resolved their issue, which resolves their request.

Watch the video: <https://play.vidyard.com/HUeYSkMqANaUwEYqD1gXH6>

Best Practices for Topic Instructions in the Legacy Builder

Topic instructions set guidelines for agent behavior and give an agent the context it needs to do its job. Review best practices for writing topic instructions to reduce latency and help your agent respond accurately and consistently.

Add a Topic to Your Agent in the Legacy Builder

You can create a custom topic from scratch or add a standard topic from the asset library. Consider best practices for creating a topic as you decide. When you add a topic to an agent, Salesforce makes a copy of the topic so that each agent and agent version has its own independent copy.

Edit a Standard Topic in the Legacy Builder

Edit an out-of-the-box topic to make sure it meets the needs of your specific use case and respects the

right guardrails for your business.

[Remove a Topic from an Agent in the Legacy Builder](#)

As needed, make sure that your agent continues to deliver helpful and relevant responses by removing topics you no longer need.

See Also

[Standard Agent Topic Reference](#)

[Video: Write Better Topic Instructions with AI Assist](#)

Best Practices for Topic Instructions in the Legacy Builder

Topic instructions set guidelines for agent behavior and give an agent the context it needs to do its job. Review best practices for writing topic instructions to reduce latency and help your agent respond accurately and consistently.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

Build sensitive or deterministic business rules into the logic of an action itself, not the topic instructions.

Instructions are nondeterministic and rely on an LLM for interpretation. They don't replace the need for coded business rules. Instead, build these requirements into the functionality of the reference action itself. For example, instead of adding the instruction "Don't refund an order unless it was within 30 business days," create a flow-based agent action that assesses the criteria for issuing a refund.

Keep instructions as minimal as possible.

Agents tend to perform best when instructions are simpler and shorter. Long instructions or too many instructions can lead to inconsistent or slow performance and complicated troubleshooting.

- Start with the fewest instructions necessary for an agent to perform as expected. Add instructions one by one as you simulate user conversations for different use cases, and then carefully test for regressions between each change.
- Before adding an instruction, review your preexisting instructions for overlap or differing advice. Contradicting instructions can cause errors and degrade performance.
- If your agent isn't performing as expected, start by paring down your instructions. Reducing the number and complexity of instructions can help your agent reach consistent baseline functionality.

Each instruction field supports up to 131,072 characters.

Use instructions to give your agent necessary business context.

Agents don't necessarily understand your business terms, such as "lead qualification" or "AHT," even if those terms are common in your industry. Agents also don't necessarily understand how more general terms, like "login problems" or "help with accounts" are used by your customers and handled in your business. In general, it helps to be explicit and provide examples.

- Define terms in plain language and provide examples. For example, ""Promo codes are used for discounts during checkout, while registration codes are used to register products for warranty."
- Provide decision criteria to help your agent choose between similar options. For example, "If the customer has access to their email, use the Email Password Reset action. If the user does not have access to their email use the Security Question Verification action."
- Clearly specify what actions to use in which situations. For example, ""Use the Track Order action when customers ask about package location or delivery dates."

Don't overload your instructions with long lists of examples. Concise, representative examples for common use cases and terminology are more effective. For example, "When using the Answer Questions with Knowledge action, include the device type in the search query (i.e., iOS or Android)." Shorter examples are easier for the agent to understand and help reduce latency.

Be explicit about any expected sequence of instructions or any conditions a conversation must meet for an agent to apply an instruction.

Agents don't follow topic instructions in the order they appear in the Topic Configuration tab, so follow these steps instead.

- Put sequential steps in a single instruction field and use explicit order words, such as "First, do X... Second, do Y... Finally, do Z..." For example, "First verify the customer's identity using the Verify Customer action, then provide account information."
- Limit a sequential instruction to a few simple steps. If your instruction is too complex, the agent can follow the steps inconsistently or out of sequence.

If your agent doesn't reliably follow the expected sequence of steps, you can use more deterministic solutions. You can [apply a filter](#) to one or more topics or actions, so the topic or instruction is only available to the agent once the conditions you specify are met. Or you can build the logic into an agent action itself.

Be mindful of language choice.

LLMs are sensitive to language choice, so aim to create plain language instructions that are precise, detailed, and direct.

- Use absolutes only when you mean it. In general, an agent tends to strictly follow strong language like "always" and "never." For example, you can use "always" to make sure that your agent calls actions that provide time-sensitive information, like case status updates, in real-time. That way, users receive the

most current information.

- Avoid jargon where possible. Your users are more likely to use plain language when chatting with an agent, so including plain language in your instructions makes it easier for your agent to understand your user's questions or requests.
- Use language consistently throughout all of your instructions. When language is ambiguous, an agent can apply instructions inconsistently or incorrectly. For example, instead of writing "Check the client's info" in one instruction and "verify the customer details" in another, use the term "customer" in both and identify specific actions by name.

See Also

[Video: Customize Your AI Agent with Topics in Agentforce](#)

[Video: Write Better Topic Instructions with AI Assist](#)

Add a Topic to Your Agent in the Legacy Builder

You can create a custom topic from scratch or add a standard topic from the asset library. Consider best practices for creating a topic as you decide. When you add a topic to an agent, Salesforce makes a copy of the topic so that each agent and agent version has its own independent copy.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

When considering whether to create a custom topic, a good rule of thumb is to start as simply as possible. It's easier to iteratively build, test, and repeat than it is to troubleshoot many changes at once.

- We recommend starting with a standard topic for common use cases and [editing it](#) to meet the needs of your business.
- Before creating a topic, review your existing topics to avoid overlap. Ensure that an existing topic doesn't already cover the same job or task. Consider whether it's possible to edit or expand an existing topic to handle your use case.
- If you determine that you need to create a topic from scratch, focus on your most common customer needs. The best candidates for your first custom topic are high-volume and relatively straightforward use cases.
- Start with the fewest topics necessary for the agent to perform as expected. Add topics one by one as you simulate user conversations for different use cases, and then carefully test for regressions between each change.
- If you find that you need two or more sets of instructions in a single topic to handle different jobs, consider splitting the topic into multiple topics.
- If you find that two or more topics frequently hand off to each other in a single conversation or the topics share nearly identical actions and instructions, consider combining your topics into a single topic.

Create a Custom Topic in the Legacy Builder

Create a custom topic to specify the actions and instructions an agent needs to meet your users' particular business needs.

Add a Topic from the Asset Library in the Legacy Builder

With standard topics, your agents can start handling common business use cases quickly. You can create topics and actions that are tailored to your business needs. When you add these topics and actions to an agent, the agent gets its own, independent copy. Changes to template topics and actions within the Asset Library aren't automatically sync'd to topics and actions within your agent. Changes made to one agent's topics or actions don't affect another agent's topics or actions.

Create a Custom Topic in the Legacy Builder

Create a custom topic to specify the actions and instructions an agent needs to meet your users' particular business needs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create a custom topic:

Manage AI Agents AND the required permissions for your agent type

Before you begin:

- Identify the actions you want to add to your topic and [create any custom actions](#).
 - Review [the parts of a topic](#) and [best practices for writing topic instructions](#).
1. From the Agentforce Agents Setup page, launch your agent in Agentforce Builder.
 2. If your agent is active, [deactivate it](#).
 3. From the left rail, select **Topics**.
 4. On the Topics panel, click **New**, and then select **New Topic**.
 5. Review the generated content in each field. You can retain the generated content and modify it to your requirement. Alternatively, you can reject the generated content altogether by clicking  , and then entering the details for each field yourself. Include at least one instruction. For supported agent types, you can optionally specify any conversation recommendations. Save your work.
To learn more about these fields, see [Agent Topics](#).
 6. Select the actions you want to add to your agent, and then click **Finish**.

Your custom topic is assigned to your agent. To test your custom topic, restart the preview conversation to apply your changes.

Before activating your agent and making your topic available to your users, carefully test and iterate on

your topic's details, especially your topic's instructions. To test your topic, open the agent in Agentforce Builder and start a preview conversation. Enter utterances that you expect to trigger your topic and actions, and then adjust your topic's details based on your results.

You can view or edit your custom topic from the Topics panel in Agentforce Builder. To view or edit your topic's details, click the topic name and select the **Topic Configuration** tab. To view, add, or remove agent actions from your topic, select the **This Topic's Actions** tab.

Watch the video: <https://play.vidyard.com/HUeYSkMqANaUwEYqD1gXH6>

Add a Topic from the Asset Library in the Legacy Builder

With standard topics, your agents can start handling common business use cases quickly. You can create topics and actions that are tailored to your business needs. When you add these topics and actions to an agent, the agent gets its own, independent copy. Changes to template topics and actions within the Asset Library aren't automatically sync'd to topics and actions within your agent. Changes made to one agent's topics or actions don't affect another agent's topics or actions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To assign a standard topic to an agent:

Manage AI Agents AND [the required permissions for your agent type](#)

1. From the Agentforce Agents Setup page, launch your agent in Agentforce Builder.
2. If your agent is active, [deactivate it](#).
3. From the sidebar, select **Topics**.
4. On the Topics panel, click **New**, and then select **Add from Asset Library**.
5. Select one or more standard topics you want to add to your agent, and then click **Finish**.

The topics you've added are assigned to your agent and visible on the Topics panel in Agentforce Builder. To test your new topic, restart the preview conversation to apply your changes.

After you've added your topic to your agent, you can [create a new version and edit any topic fields or add or remove topic actions](#). Your changes apply to a single agent.

See Also

[Standard Agent Topic Reference](#)

Edit a Standard Topic in the Legacy Builder

Edit an out-of-the-box topic to make sure it meets the needs of your specific use case and respects the right guardrails for your business.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To edit a standard topic for an agent:	Manage AI Agents AND the required permissions for your agent type
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Before you begin, [add the topic you want to customize to an agent](#).

1. From the Agentforce Agents Setup page, launch the agent you want to use with a customized topic in Agentforce Builder.
2. If your agent is active, [deactivate it](#).
3. From the left rail, select **Topics**.
4. From the This Agent's Topics tab, select the topic you want to edit.
5. To edit the topic configuration, from the Topic Configuration tab, edit the topic fields you want to customize.
6. You can reorder the topic instruction fields so that they are read in a specific order as well.
To learn more about these fields, see [Agent Topics](#).
7. To add an action to your topic, from the This Topic's Actions tab, click **New**. Create a custom agent action, or select the action or actions you want to add to your agent.
8. To remove an action from your topic, from the This Topic's Actions tab, click the dropdown next to the action you want to remove, and then click **Remove from Agent**.
9. Save your changes. Your changes apply only to this agent and agent version.

The topic you customized is assigned to your agent and replaces the original version. To test your new version, restart the preview conversation to apply your changes.

To revert your topic to the original version from the asset library, from the left rail, select **Topics**. From the This Agent's Topics tab, click the dropdown menu next to your customized topic and select **Revert to Original**.

See Also

[Standard Agent Topic Reference](#)

[Editing Standard Agent Action Reference Actions](#)

Remove a Topic from an Agent in the Legacy Builder

As needed, make sure that your agent continues to deliver helpful and relevant responses by removing topics you no longer need.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To remove a standard topic for an agent:	Manage AI Agents AND the required permissions for your agent type
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Standard topics that you remove from an agent remain in the Asset Library and can be re-added to the agent later. Custom topics that you remove from an agent are permanently deleted and can't be restored. If the removed topic is a customized version of a standard topic, the customizations are deleted and only the standard version remains.

1. From the Agentforce Agents Setup page, launch the agent you want to use with a customized topic in Agentforce Builder.
2. If your agent is active, [deactivate it](#).
3. From the sidebar, select **Topics**.
4. From the dropdown list next to the topic you want to remove, select **Remove from Agent**.
Your change is saved automatically.
5. To test your changes, restart the preview conversation.

Agent Actions

Actions are how agents get things done. Agents include a library of actions, which are the tools an agent can use to do its job. For example, if a user asks an agent for help with writing an email, the agent first selects a topic, then it launches an action that drafts and revises the email and grounds it in relevant Salesforce data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

Common User Access for Standard Agent Actions

Learn about the permissions required for users to run many standard agent actions.

Add an Action to a Topic from the Asset Library

Add standard actions to your agent to start handling common business use cases quickly, or create custom actions tailored to your business needs. When you add these actions to an agent, the agent gets its own, independent copy. Changes to template actions within the asset library aren't automatically synced to topics and actions within your agent. Changes made to one agent's actions don't affect another agent's topics or actions.

Create a Custom Action

You can create a custom action from the asset library or from within an agent in Agentforce Builder. When you create an action from the asset library, it's available to add to multiple agents and versions. When you create an action from within an agent in Agentforce Builder, it's available only to that agent.

Agent Actions in the Legacy Builder

Create and manage actions in the legacy Agentforce Builder.

Editing Standard Agent Action Reference Actions

Customize the behavior of some standard agent actions by editing the underlying flow or prompt template.

Explore Standard Agent Actions

Learn all about the agent actions Salesforce provides out of the box in our comprehensive reference library.

See Also

[The Building Blocks of Agents](#)

[Trust and Agentforce](#)

[Standard Agent Action Reference](#)

Common User Access for Standard Agent Actions

Learn about the permissions required for users to run many standard agent actions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

User Access to Agent Types and Templates

Different agent types and templates manage user access differently, depending on the channels the agent supports and your use case.

- [Review the requirements for your agent type](#) to determine what permissions are required for users to access your agent.
 - Many agents that interact with employees are Agentforce Employee agents. You must [give your users access](#) to individual Employee agents.

- Many agents that interact with customers are Agentforce Service agents. Your users don't require special permissions to interact with Service agents.
- Determine whether whether permissions should be assigned to end users, [the agent's user record](#), or both.
 - Agents connected to channels that are restricted to logged-in users, such as Lightning Experience, operate in the context of the logged-in user and the user's access controls are applied. If you're creating an Agentforce Employee agent that connects to Lightning Experience, the Salesforce mobile app, Slack, or Enhanced Web Chat on an Experience Cloud site, assign permissions to individual users or user profiles.
 - Agents connected to channels that aren't restricted to logged-in users, such as Messaging channels, operate in the context of an agent user, which is a Salesforce user record with all the permissions that the agent needs to do its job. If you're creating an Agentforce Service agent that connects to Enhanced Chat or another Messaging channel, assign permissions to the agent's user record.
- Review the documentation for your agent template and actions for any required template- or feature-specific permissions.

 **Note** Don't assign permissions for creating or managing agents to end users or the agent user.

User Access for Standard Agent Actions

These requirements apply across many standard agent actions.

Feature Your Agent Uses	Required permissions
Prompt templates, including those associated with agent actions	Permission Set: Prompt Template User
Flows, including those associated with agent actions	App Permission: Run Flows OR Grant access to individual flows See Limit User Access to Execute Flows
Apex classes, including those associated with agent actions	Apex Class Access: Select the Apex classes that the agent uses. See How Does Apex Class Security Work?
Features and actions that leverage Knowledge and Data 360, such as: <ul style="list-style-type: none"> • Agentforce Data Library 	App Permission: Allow View Knowledge App Permission: Access Conversation Entries Permission Set: Data Cloud User

Feature Your Agent Uses	Required permissions
<ul style="list-style-type: none"> Answer Questions with Knowledge agent action 	<p>Data Category Visibility: Select the data categories that include knowledge article data that you want your agent to use in responses.</p> <p>See Data Category Visibility</p> <p>Object Permissions: Following the principle of least privilege, grant access to the Knowledge object.</p>

In addition to this list, review the documentation for each action in the [Standard Agent Action Reference](#) for any template- or feature-specific licenses or permissions. Some agent actions require add-on licenses that must be assigned to each user.

Add an Action to a Topic from the Asset Library

Add standard actions to your agent to start handling common business use cases quickly, or create custom actions tailored to your business needs. When you add these actions to an agent, the agent gets its own, independent copy. Changes to template actions within the asset library aren't automatically synced to topics and actions within your agent. Changes made to one agent's actions don't affect another agent's topics or actions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

To make changes to your agent, it must be in a draft state. If you want to make changes to a committed agent, [create a new draft](#).

- From the Agents list in the Agentforce Studio app, open the agent you want to add an action to.
- If there are multiple versions of your agent, from the header in Agentforce Builder, select the agent version you want to edit.
- In the Explorer panel, open the topic you want to add the action to, then hover over Actions and click .
- Select **Add from Asset Library**.
- Select one or more actions to add to your agent.
- Click **Add to agent**.

A copy of each of the actions you selected is added to your agent, and you can edit this copy. Review and customize each of your actions, including the underlying flows, prompt templates, or other reference actions. Any changes you make to these actions apply only to this topic and agent version and don't

affect other topics, agents, or the actions in the asset library.

When you add an action to a topic, it's automatically added to your topic's reasoning actions (Actions Available for Reasoning), so the action is available for your agent to select during reasoning with an LLM. In reasoning actions, you can add logic to your agent action, such as filters and follow-up actions. To run the action deterministically before your agent begins reasoning, reference the action in your topic's reasoning instructions.

Create a Custom Action

You can create a custom action from the asset library or from within an agent in Agentforce Builder. When you create an action from the asset library, it's available to add to multiple agents and versions. When you create an action from within an agent in Agentforce Builder, it's available only to that agent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create a custom agent action:	Manage AI Agents AND the required permissions for your agent type
To create or modify prompt templates:	Prompt Template Manager
To create or modify flows:	Manage Flow

Create a Custom Action in Agentforce Builder

When you create a custom action from an agent in Agentforce Builder, it's available only to that agent. Any changes you make apply only to this agent version. To make an action available to add to other topics, agents, and agent versions, create it in the asset library instead.

Before you begin:

- Review the [considerations for custom actions](#).
- Create the underlying Salesforce functionality that you want to use with your agent. When you create a custom action, you configure the functionality to use with your agent. You can create a custom action that calls invocable methods and REST Apex classes, external services, autolaunched flows, MuleSoft APIs, or prompt templates.

Access to a custom agent action depends on the type of Salesforce functionality that it references. For example, if a custom action is built using a flow, the custom action adheres to the permissions, field-level security, and sharing settings configured in the flow. To run the action, at minimum the user or Agent

User must have the Run Flows permission and access to objects used in the flow. See [Common User Access for Standard Agent Actions](#).

To make changes to your agent, it must be in a draft state. To make changes to a committed agent, [create a new draft](#).

1. From the Agents list in the Agentforce Studio app, open the agent you want to add an action to.
2. If there are multiple versions of your agent, from the header in Agentforce Builder, select the agent version you want to edit.
3. In the Explorer panel, open the topic you want to add the action to, then hover over Actions and click .
4. Select **Create New Action**.
5. Give the action a name, and then click **Create and Open**. Your custom action is added to your topic and agent.
6. From the Reference Action Type dropdown, select the type of functionality that you want to use to build your agent action, such as a flow or prompt template. Then select the category, if prompted, and the reference action. The descriptions for the custom action and each input and output are populated with the descriptions from the reference action.
7. Make changes to your action.
 - a. Review the description for your action. If necessary, make changes to help your agent understand what the action does and when and how to use it.
 - b. Review the description for each input and output.
 - c. For each input, specify any applicable settings.

Input Setting	Details
Collect data from user	Require this parameter to be provided by the user.
Require input	Require this parameter in order to execute the action. When this setting is enabled, if the input is missing, the action can't be run. All other inputs are treated as optional. If an input is required by the reference action, this setting is enabled by default and read-only.

- d. For each output, specify any applicable settings.

Output Setting	Details
Include in agent context	When you create an agent action, all inputs and outputs from the reference action are added to the agent action. When this setting is enabled for an output, the output is added to the agent's conversation history and made available for reasoning. Disable the setting for any underlying reference action outputs you don't want to use with your agent. At least one output must be used with the agent action.

Output Setting	Details
Show in conversation	<p>When this setting is enabled, the outputs are included in the agent's response. On some channels, some outputs are converted to structured content (for example, the Agentforce panel in Lightning Experience recognizes record pages).</p> <p>When this setting is disabled for all outputs, the agent uses the LLM to summarize the outputs in natural language in the agent's response.</p>

- e. Specify any additional settings for your action.

Additional Setting	Details
Require user confirmation	When an action makes a change to a record, you can require an agent to ask the user to confirm the change before the agent can execute it.
Show loading text for this action	<p>Show loading text in the agent conversation while the action is running in the background.</p> <p>For a custom action, you can specify the loading text for the action in the Loading Text field. In 1–3 words with no punctuation, tell your users what your action is doing. For example, “Crafting your email,” “Making updates,” or “Getting activity details.”</p> <p>When this setting is disabled, or when this setting is enabled but no loading text is specified, default loading text is shown. For example, “Working,” “Making progress,” or “Checking my notes.”</p> <p>To show loading text in enhanced Messaging channel conversations, additional configuration is required for Enhanced Chat.</p>

8. Save your changes.

Your action is available only in this agent topic and version and isn't available in the asset library. Any changes you make to the action apply only to this topic and agent version. Changes don't affect other topics or agents.

Your action is automatically added to your topic's reasoning actions (Actions Available for Reasoning), so the action is available for your agent to select during reasoning with an LLM. In reasoning actions, you can add logic to your agent action, such as filters and follow-up actions. To run the action deterministically before your agent begins reasoning, reference the action in your topic's reasoning instructions.

Create a Custom Action from the Asset Library

Create a custom action in the asset library to make your action available to multiple agents, versions, and topics. Then add it to one or more agents.

Before you begin:

- Review the [considerations for custom actions](#).
- Create the underlying Salesforce functionality that you want to use with your agent. When you create a custom action, you configure the functionality to use with your agent. You can create a custom action that calls invocable methods and REST Apex classes, external services, autolaunched flows, MuleSoft APIs, or prompt templates.

Access to a custom agent action depends on the type of Salesforce functionality that it references. For example, if a custom action is built using a flow, the custom action adheres to the permissions, field-level security, and sharing settings configured in the flow. To run the action, at minimum the user or Agent User must have the Run Flows permission and access to objects used in the flow. See [Common User Access for Standard Agent Actions](#).

1. From Setup, enter *Agentforce Assets*, and then select **Agentforce Assets**.
2. From the Actions tab, click **New Agent Action**.
3. From the Reference Action Type dropdown, select the type of functionality that you want to use to build your agent action, such as a flow or prompt template. Then select the category, if prompted, and the reference action.
The descriptions for the custom action and each input and output are populated with the descriptions from the reference action.
4. Make changes to your action.
 - a. Review the description for your action. If necessary, make changes to help your agent understand what the action does and when and how to use it.
 - b. Optionally, specify loading text for your action. Otherwise, turn off the setting.

Setting	Details
Show loading text for this action	<p>Show loading text in the agent conversation while the action is running in the background.</p> <p>For a custom action, you can specify the loading text for the action in the Loading Text field. In 1–3 words with no punctuation, tell your users what your action is doing. For example, “Crafting your email,” “Making updates,” or “Getting activity details.”</p> <p>When this setting is disabled, or when this setting is enabled but no loading text is specified, default loading text is shown. For example, “Working,” “Making progress,” or “Checking my notes.”</p>

Setting	Details
	To show loading text in enhanced Messaging channel conversations, additional configuration is required for Enhanced Chat .

- c. Review the description for each input and output.
- d. For each input, specify any applicable settings.

Input Setting	Details
Collect data from user	Require this parameter to be provided by the user.
Require input	Require this parameter in order to execute the action. When this setting is enabled, if the input is missing, the action can't be run. All other inputs are treated as optional. If an input is required by the reference action, this setting is enabled by default and read-only.

- e. For each output, specify any applicable settings.

Output Setting	Details
Include in agent context	When you create an agent action, all inputs and outputs from the reference action are added to the agent action. When this setting is enabled for an output, the output is added to the agent's conversation history and made available for reasoning. Disable the setting for any underlying reference action outputs you don't want to use with your agent. At least one output must be used with the agent action.
Show in conversation	When this setting is enabled, the outputs are included in the agent's response. On some channels, some outputs are converted to structured content (for example, the Agentforce panel in Lightning Experience recognizes record pages). When this setting is disabled for all outputs, the agent uses the LLM to summarize the outputs in natural language in the agent's response.

5. Click **Finish**.

Your action is available in the asset library. To use your action, add it to an agent. See [Add an Action to a Topic from the Asset Library](#).

Any changes you make to the action in the asset library aren't synced to any copies of the action you've added to agents. To apply changes made to an action in the asset library to an agent, you must add the

updated action to the agent.

Agent Actions in the Legacy Builder

Create and manage actions in the legacy Agentforce Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited**, and **Developer** Editions. [Required add-on licenses vary by agent type](#).

[Maintain Trust with Agentforce Actions in the Legacy Builder](#)

Agents connected to employee channels, such as Lightning Experience, the Salesforce mobile app, and Slack, limit access to topics and actions by default, based on the end user's context. Agentforce Service agents connected to customer channels, such as enhanced Messaging channels and Enhanced Chat, require additional configuration to ensure secure access. As you configure your agent, it's important to think through the security and identification requirements for your use case and only grant your agents the actions and access required to complete the tasks you want them to be able to complete autonomously on behalf of your customers. For sensitive actions, we recommend building customer verification directly into the action's flow.

[Add an Action to a Topic in the Legacy Builder](#)

To use an action with an agent, add it to a topic. An action can be added to multiple topics. When you add a topic to an agent, Salesforce makes a copy of the topic and its actions. Each agent and agent version has its own independent copy of topics and actions.

[Create a Custom Agent Action in the Legacy Builder](#)

With custom actions, you can extend your agent with Salesforce functionality so that it's ready to assist users with tasks specific to your business. Build custom actions using Apex, flows, prompt templates, and API integrations.

Maintain Trust with Agentforce Actions in the Legacy Builder

Agents connected to employee channels, such as Lightning Experience, the Salesforce mobile app, and Slack, limit access to topics and actions by default, based on the end user's context. Agentforce Service agents connected to customer channels, such as enhanced Messaging channels and Enhanced Chat, require additional configuration to ensure secure access. As you configure your agent, it's important to think through the security and identification requirements for your use case and only grant your agents the actions and access required to complete the tasks you want them to be able to complete autonomously on behalf of your customers. For sensitive actions, we recommend building customer verification directly into the action's flow.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

You have full control over the actions that your agents can take, so you can tailor your customer experience to your needs. To enhance security and ensure that agents operate within defined boundaries, we recommend:

- Assigning agents that connect to customer channels the minimum user permissions required to do their job.
- Building identity confirmation and access control directly into the flow of sensitive actions.

Every company's risk tolerance and security standards are unique, and there's no one way to incorporate identity verification into your agent implementation. For instance, depending on your company policy, you might allow an Agentforce Service agent to accept order IDs conversationally and provide order statuses without requiring any formal identity verification beyond that. However, if your business requires shipping sensitive or regulated materials, you might require customers to authenticate themselves before looking up order information on their behalf. Consider your company's risk tolerance and security standards before configuring your agent. To prevent agents from sharing data outside the intended scope, configure them with authentication and authorization in mind.

Agentforce Actions and Security

When your agent is connected to customer channels, think of agent actions as either public or private. While Salesforce doesn't have a specific setting to designate actions as public or private, this framework helps you conceptualize and implement your company's security standards.

Public Actions

Public actions are actions that your company is comfortable taking on behalf of anyone, regardless of identity, without authentication. For example, the [Answer Questions with Knowledge](#) action is usually considered a public action, especially if it's grounded in public information such as return policies. Looking up an order can also be a public action if you're comfortable doing so without securely confirming the requester's identity. In such cases, the information required to identify a specific order, such as the order ID or email address, can be passed conversationally.

Private Actions

Private actions require the requester's identity to be confirmed according to your company's comfort level; for example, through authentication or through the sharing of identifying information in a messaging session. Updating personal appointment information, making purchases, or requesting services on a support contract are typically examples of private actions, and we don't recommend making them public. For an Agentforce Service agent to complete a

private action, the user triggering the action must be authorized to access the action, and their identity should be securely confirmed.

Guidelines for Securely Implementing Private Actions

To enhance the security of agents connected to customer channels, it's best practice to require agents to confirm the identity of the person they're interacting with before they take a private action on their behalf.

For particularly sensitive actions, we recommend confirming identity using techniques such as two-factor authentication, which handle the authentication process outside the scope of the conversation. Sharing identifying information within the chat isn't a secure verification method, but the approach you choose depends on your risk tolerance and security standards.

After a customer's identity has been confirmed, the identifying information can be saved in the associated [MessagingSession](#) record. Before completing any private action, the agent can reference the MessagingSession record to confirm the identity and permissions of the person it's interacting with. This process can be built directly into the flow of private actions.

When building an agent that connects to customer channels and can take private actions, it's crucial to consider how to mitigate risk. While all use cases are different, keep these guidelines in mind.

Guideline	Details
Follow the principle of least privilege.	<ul style="list-style-type: none">Restrict access: Grant only the minimum necessary permissions to your agent.Review permissions regularly: To ensure that permissions are still appropriate, conduct periodic reviews.
Implement robust access controls.	<ul style="list-style-type: none">Enforce strong authentication: Implement strong authentication mechanisms, such as two-factor authentication, to verify the identity of users interacting with your agent.Monitor access logs: To identify any suspicious activity, regularly review the access logs.
Design secure actions.	<ul style="list-style-type: none">Limit scope: Design actions to operate within specific boundaries and prevent unauthorized access to sensitive data. Build confirmation of user identity and permissions directly into each private action.

Guideline	Details
	<ul style="list-style-type: none"> • Validate input: To prevent malicious input and potential security vulnerabilities, implement input validation. • Error handling: To prevent information disclosure and system instability, implement robust error handling.

- !** **Important** Organization-wide sharing defaults (OWD) determine what access users have to records they don't own. In an agent session with an authenticated user, the session runs in the end user's context and OWD depend on whether the user is external or internal. In an agent session with an unauthenticated user, the session runs in [the agent user's](#) context and OWD for internal users apply. Carefully review your OWD, your agent user's permissions, and your agent configuration to ensure the right record access for your end users and your business.
- For all agents that use the agent's user record, we recommend using [filters](#) and [variables](#) to limit record access at the topic and action levels. This strategy protects sensitive data regardless of your OWD.
 - You can [restrict your OWD for internal users](#) to limit record access for all internal users. Then you can [create sharing rules](#) to selectively grant access, excluding the Einstein Agent User where appropriate.

Next Steps

Learn how to build user authentication into your private agent actions, including with the Customer Verification standard topic.

[Add User Identification to Agentforce Actions](#)

When configuring your agent that connects to customer channels so that it can take private actions securely, have it confirm the identity of the person it's interacting with according to your company's standards.

[Verify Customers with Standard Topics in the Legacy Builder](#)

Before an Agentforce Service agent takes a private action on a user's behalf, Salesforce recommends verifying the identity of the person the agent is interacting with. To verify the identity of an unverified user in an agent session, configure your agent to use the Customer Verification topic or the Service Customer Verification topic and limit access to topics and actions that you specify. You can require different levels of verification for different topics and actions, based on your business's security requirements.

[Example Implementation of a Secure Agentforce Service Agent](#)

The details of implementing secure Agentforce Service agents vary depending on where the agent is deployed and the surrounding user authentication policies. To get a feel for the underlying patterns,

let's look at an example.

See Also

[Trailhead: Deploy Agent Authentication](#)

Add User Identification to Agentforce Actions

When configuring your agent that connects to customer channels so that it can take private actions securely, have it confirm the identity of the person it's interacting with according to your company's standards.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

Agentforce Service agents can be deployed in multiple Messaging configurations:

- An Enhanced Chat channel deployed to an Experience site which is restricted to authenticated users.
- An Enhanced Chat channel deployed to a custom site or app which has its own authentication mechanism outside of Salesforce.
- An enhanced third-party Messaging channel, such as Apple Messages for Business.

In each configuration, you can exercise full control over the actions that your agents perform. To ensure your agent operates within the parameters you define, carefully consider how to manage and limit agent actions. Depending on your company policies, you may decide not to require true authentication for your agents to take all or any private actions.

Authenticating Experience Site Users (Enhanced Chat)

When your Agentforce Service agent is deployed to an Experience site that is restricted to authenticated users, each Agentforce messaging session comes automatically with an active and authenticated AuthSession. Because the user's Account and Contact IDs are known, it's relatively straightforward to assign those values to the respective fields in the MessagingSession record.

Each private action should be configured to confirm that these values are assigned and that the identified AuthSession is still active before the action can be completed.

Authenticating Users From an External Site or App (Enhanced Chat)

When your Agentforce Service agent is deployed to a custom site or app that has its own authentication mechanism outside of Salesforce, map your Agentforce messaging session to a MessagingSession record.

The [User Verification feature](#) can help by allowing your custom site or app to securely pass a user

identifier, which is saved to the [MessagingEndUser](#) record. For example, if you use email addresses as an identifier, private actions can be configured to parse an email address in the [MessagingEndUser](#) record as confirmation of the user's identity.

This method of managing authentication doesn't automatically track an authenticated [AuthSession](#), so there's no immediate way to invalidate authentication after granting it. Authentication is valid until the expiration date embedded in the token is reached. Define the expiration dates according to your company's standards.

Identifying Users in Third-Party Messaging Channels

When your Agentforce Service agent is deployed to an enhanced third-party Messaging channel, such as Apple Messages for Business, build authentication into the flow of the interaction for the Agentforce Service agent to take private actions.

Authentication Method	Details
Authenticate users via channel identifiers.	<p>Depending on your company policy, channel-specific identifiers can be used for authentication. This method isn't without risk. Using channel-specific identifiers for authentication purposes means delegating your authentication to the channel provider, and you should carefully consider your authentication requirements before doing so.</p> <p>Should you decide to delegate authentication to your channel provider, implement Channel Object Linking to automatically tie the Contact to the associated messaging session. Then, configure private actions to reference this information before being completed.</p>
Authenticate users via a side channel.	<p>If you can't use channel-specific identifiers for authentication, configure your Agentforce Service agent to authenticate users via a side channel. Although you're no longer relying on the channel provider's identifier, the conversation is still secured by that provider. If a malicious user can spoof or otherwise assume someone else's identity on that channel, they can likely do the same after the session is authenticated over the side channel.</p> <p>Authenticating users via a side channel is a variant</p>

Authentication Method	Details
	of authenticating Experience site users, in that it delegates authentication to an existing web authentication mechanism. To implement this, pass the MessagingSessionId via a query parameter to a site that implements the required authentication. Then, when the server for that site receives the authenticated request for that MessagingSessionId, it should be configured to use the Salesforce API to update the MessagingSession record with the identifiers retrieved from the authentication mechanism.
Authenticate using messaging components.	In enhanced third-party Messaging channels such as Apple Messages for Business, Agentforce Service agents can send authentication messaging components to the messaging end user (MEU). In this process, the MEU receives an authentication prompt on their device, allowing them to complete the authentication using a standard authentication provider such as Facebook or Google. You can also configure custom authentication providers.

Limiting the Scope of Private Actions

After a user's identity is confirmed, private actions can use the Session ID to enforce the scope of private actions based on the associated account ID and contact ID. Using the Session ID guarantees that the action is limited as intended.

For example, the [Get Order By Order Number](#) action can be configured to pull the contact ID from the MessagingSession record before looking up any order information.

```
//Get Contact from Session
SELECT Id, contactId__c FROM MessagingSession
WHERE sessionId =: SessionId

//Get orders based on Contact from Session
SELECT Id, Status FROM Order
WHERE ContactId =: ms.contactId__c AND orderNumber =: orderNumber
```

You can configure other private actions similarly, ensuring that Agentforce Service agents provide authenticated users with only their own data.

Verify Customers with Standard Topics in the Legacy Builder

Before an Agentforce Service agent takes a private action on a user's behalf, Salesforce recommends verifying the identity of the person the agent is interacting with. To verify the identity of an unverified user in an agent session, configure your agent to use the Customer Verification topic or the Service Customer Verification topic and limit access to topics and actions that you specify. You can require different levels of verification for different topics and actions, based on your business's security requirements.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To build and manage Service Agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

These instructions walk you through how to restrict access to topics and actions based on whether the user has successfully verified their identity based on their username and email address within an agent session. Here's what you'll do.

- Learn more about the Customer Verification topic.
- Add the topic to your agent and configure the Send Email with Verification Code and Verify Customer actions to work seamlessly together.
- Store one or more outputs of the Verify Customer actions in variables, which you'll use to control access to private topics and actions.
- Create and apply a filter to restrict access to topics that contain private actions, based on the conditions you specify.
- Assign a variable to an action input to require a verified customer ID to execute a private action.
- Test your changes in Agentforce Builder.

Keep in mind that these instructions represent one possible configuration of the Customer Verification topic. You can customize the topic, agent actions, filters, and variables to meet the needs of your business and use cases.

See Also

[Trailhead: Deploy Agent Authentication](#)

How the Verification Topics Work

When an unverified user triggers a topic or action that you've configured to require user verification, the agent launches the verification topic.

The topic contains two flow-based agent actions. The first action, Send Email with Verification Code, asks the user for their username or email, and then checks against Salesforce user and contact records. It then sends an email from no-reply@salesforce.com with a one-time passcode (OTP), which remains valid for five minutes. It then prompts the user to check their email and provide the code.

When the user provides a code, it triggers the second agent action, Verify Customer. This action checks whether the user-provided code matches the generated verification code within the valid window. If the codes match, the Verified output is set to true and the Customer ID output contains the verified user or contact ID. The agent sends a confirmation message and resumes handling the user's question or request.

If the codes don't match, the agent prompts the user to re-enter the code. After three failed attempts, the agent restarts the verification process by asking the user for their username or email.

Add a Verification Topic to Your Agent

To get started, add a verification standard topic to an agent connected to customer channels.

In some agent templates, a verification topic is included with your agent out of the box. If that's true for your template, you can skip this step.

1. From the Agentforce Agents Setup page, open your agent in Agentforce Builder.
2. If your agent is active, [deactivate it](#).
3. From the sidebar, select **Topics**.
4. On the Topics panel, click **New**, and then select **Add from Asset Library**.
5. Select the **Customer Verification** topic or the Service Customer Verification topic, and then click **Finish**.

Assign the Outputs of Send Email with Verification Code to the Inputs of Verify Customer

Next, configure the actions in your verification topic to work seamlessly together.

In some agent templates, the Send Email Verification Code action outputs are already mapped to variables and assigned to the Verify Customer action inputs. If that's true for your template, you can skip this step.

1. Store the values of the outputs of the Send Email with Verification Code action.
 - a. On the This Topic's Actions tab, select the **Send Email with Verification Code** action.
 - b. On the Customer Type output, from the Map to Variable dropdown, select **New Custom Variable**.
 - c. Enter the variable's details.

- d. Leave the Allow value to be set by API and Allow LLM to use value settings disabled. Leaving these settings disabled is a best practice for all variables used for verification or other security functions.
 - e. Save your changes.
 - f. Repeat this process for the Customer ID and Authentication Key outputs. Don't store the output of Customer ID in the Verified Customer ID system variable. Instead, create a custom variable. Verified Customer ID is intended for use only after the verification process is completed.
2. Assign your new variables to the corresponding inputs of the Verify Customer action.
 - a. On the This Topic's action's tab, select the **Verify Customer** action.
 - b. On the Customer Type input, from the Assign a Variable dropdown, select the variable you created to store the Customer Type output from the Send Email with Verification Code action.
 - c. Save your changes.
 - d. Repeat this process for the Customer ID and Authentication Key inputs, with the variables you created to store the corresponding outputs from the Send Email with Verification Code action.

Map Verify Customer Action Outputs to Variables

Store the values of the Verified and Customer ID outputs to variables, so you can use them in filter conditions and as input for actions that you only want the agent to take on behalf of verified users.

1. On the This Topic's Actions tab, select the **Verify Customer** action.
2. On the Verified output, from the Map to Variable dropdown, select **New Custom Variable**.
3. Name the variable *Is Verified* and enter the variable's details.
4. Leave the Allow value to be set by API and Allow LLM to use value settings disabled. Leaving these settings disabled is a best practice for all variables used for verification or other security functions.
5. Save your changes.
6. On the Customer ID output, from the Map to Variable dropdown, select **Verified Customer ID**. In some agent templates, the Verified Customer ID is available out of the box as a system variable. If the Verified Customer ID variable doesn't exist for your template, [create it as a custom variable](#). Leave the Allow value to be set by API and Allow LLM to use value settings disabled.
7. Save your changes.

Create and Apply a Filter for Topics

Create a filter with the Is Verified and Verified Customer ID variables to make topics containing private actions available only to verified users.

1. From the sidebar, select **Context**.
2. From the Context panel, select the **Filters** tab, and then click **New**.
3. Enter a name, API name, and description for your filter.
4. Under Use Assets When, require all conditions to be met for an agent to use a topic or action with this filter applied.
5. Create the following conditions.

- Verified Customer ID Does Not Equal Null
 - Is Verified Equals True
6. Save your changes.
7. To use your filter, apply it to any topics that require verification. From the Topics panel, click the name of the topic that you want to modify.
8. On the topic's details panel, click .
9. Search for and select the filter that you want to apply, and then save your changes. Your filter is applied to the topic or action in this agent only.

From the This Topic's Actions tab, you can also add filters to private actions. To learn more about filters, see [Create a Filter to Control Access to Topics and Actions](#).

Assign the Verified Customer ID Variable to Private Action Inputs

For additional security, add the Verified Customer ID variable as an input for actions that you only want the agent to take on behalf of verified users. The agent can only run the action when the Verified Customer ID variable is filled. You can also use the value of the Verified Customer ID value in the logic of your action.

1. From the sidebar, select **Topics**. Then select the topic that includes the action that you want to modify.
2. On the This Topic's Actions tab, select the action. On the ID input, from the Assign a Variable dropdown, select the **Verified Customer ID** variable.
3. Save your changes.

Repeat this process for each action that you want to require a verified customer ID.

Test Your Changes

Use the preview conversation and preview conditions to verify your changes in Agentforce Builder. Your agent operates in the same Agent User context in the preview conversation as it does when deployed in messaging channels.

1. From the conversation preview panel, click  to specify preview conditions.
2. Specify a specific end user ID and save your changes.
3. To apply your changes, restart your preview conversation.
4. Start a conversation that you expect to trigger a topic or action that you've configured to work with the Customer Verification topic. For example, ask your agent for a refund.
5. When the agent prompts you for an email address, provide one. You don't have to check this email to complete the test.
6. When the agent sends the email, check the plan canvas and copy the OTP. Then send it to the agent.

If the verification was successful, the agent sends a message to confirm that you're verified. Then you continue to execute the original topic you triggered.

If your agent doesn't perform as expected, review the variables and filters you've created and the topics and actions you've applied them to. You may need to adjust your topic instructions to help your agent

understand when to use the Customer Verification topic.

When you're satisfied with your results, [activate your agent](#).

Further Customizations

Make changes to your verification topic to ensure it meets your business's use cases and security requirements.

By default, your verification topic uses either user or customer IDs and email. However, you can edit the underlying flows associated with either action to modify the identification required or how the OTP is sent. To modify the agent actions, [create custom actions](#) based on the same flows.

You can add additional actions to your verification topic. Limit the scope of the actions that you use for verification such that each action completes a modular step of the process. Agent actions with outputs that sit empty can cause errors, because the agent attempts to fill the output before a process is complete.

Example Implementation of a Secure Agentforce Service Agent

The details of implementing secure Agentforce Service agents vary depending on where the agent is deployed and the surrounding user authentication policies. To get a feel for the underlying patterns, let's look at an example.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

When your Agentforce Service agent is deployed to an Experience site, it's sometimes necessary to reauthenticate the users interacting with your agent. In such cases, authentication within the session can be invoked.

Users can be authenticated by providing them with a parameterized URL within the conversation. The parameterized URL should reference a secure method on the Experience Cloud portal. To prepare for external authentication before sending the parameterized URL, the `MessagingSession` object is configured with these custom fields.

Field	Initial Value	Definition
AuthSessionId	NULL	Identifies if there's an <code>AuthSession</code> currently linked to this <code>MessagingSession</code> . This indicates whether the messaging session is authenticated.
AuthRequestTime	<code>DateTime.Now()</code>	Stores when authentication was requested, limiting the

Field	Initial Value	Definition
		MessagingSession from being assigned identities outside of the directed window and allowing control of the timeframe during which external authentication is allowed.
AccountId	NULL	Ensures that the Account linked to the authenticated session is assigned relative to the Contact authenticated in the ExperienceCloud portal.
ContactId	NULL	Ensures that the Contact linked to the authenticated session is assigned relative to the Contact authenticated in the ExperienceCloud portal.

The Apex Method handling the parameterized URL accepts the MessagingSession.SessionKey field. This Globally Unique Identifier (GUID) is unique to MessagingSession records where Status = “Active”. This method looks up the related MessagingSession records with this query.

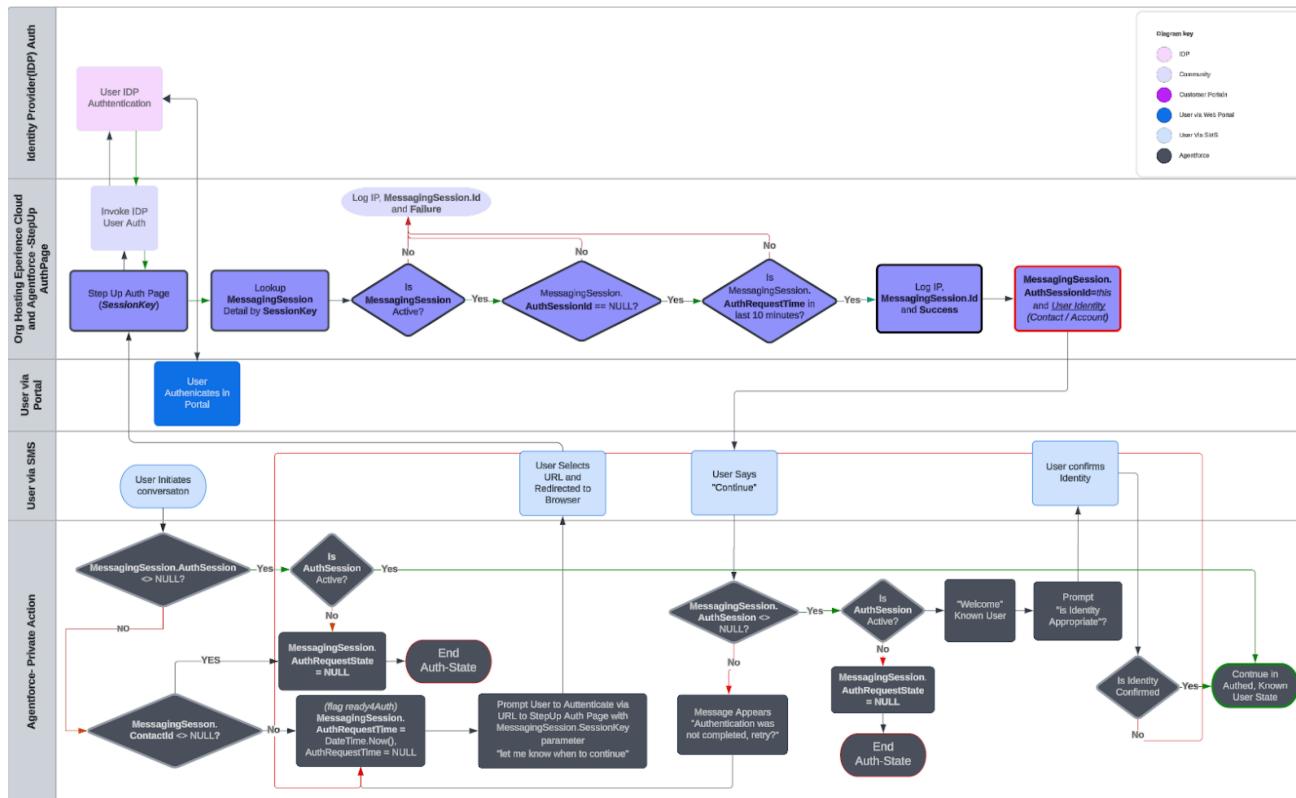
```
SELECT Id, Conversation.ConversationIdentifier, Status, FROM MessagingSession
WHERE SessionKey = '1db8a0ab-aae4-4ed9-b6d5-3e7fe85b9574' AND Status = 'Active'
AND AuthSessionId__c = NULL
```

If this query returns a record, that record represents a conversation with an Agentforce Service agent where the user has been authenticated. The returned record can then be updated to represent the relationship to the current AuthSession of the Experience Cloud portal. For instance, if the MessagingSession is defined as ms.

```
ms.AuthSessionId__c = SessionManagement.GetCurrentSession().get('SessionId');
User authUser = [SELECT Id, ContactId, AccountId from User WHERE Id = :UserInfo.getUserId()];
ms.AccountId__c = authUser.AccountId;
ms.ContactId__c = authUser.ContactId;
ms.commit();
```

The Agentforce Service agent now has the information it needs to confirm the user’s identity when taking private actions. It also has the ID of the AuthSession, which can be terminated as soon as the conversation in the corresponding portal session ends.

In this example the user is directed to a portal page where they will authenticate to the side. This will update the MessagingSession record for the AgentForce session with the user’s identity. It will not however generate an event in the AgentForce session so is dependent on the user continuing the conversation in AgentForce, once authentication is complete.



Add an Action to a Topic in the Legacy Builder

To use an action with an agent, add it to a topic. An action can be added to multiple topics. When you add a topic to an agent, Salesforce makes a copy of the topic and its actions. Each agent and agent version has its own independent copy of topics and actions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To assign actions to a topic:

Manage AI Agents AND the required permissions for your agent type

For best performance, we recommend assigning no more than 15 actions to a topic.

You can also add an action to your agent when you [create a custom topic](#).

1. From the Agentforce Agents Setup page, launch your agent in Agentforce Builder.
2. If your agent is active, [deactivate it](#).
3. From the left rail, select **Topics**.

4. On the Topics panel, click the name of the topic you want to add an action to, and then select the **This Topic's Actions** tab.
5. Click **New**.
6. Select the action or actions you want to add to your agent from the actions library. Or [create a custom agent action](#).
7. To save your changes, click **Finish**.

The actions you've added are assigned to your agent and are visible on the Topics panel of Agentforce Builder. To test your topic with your newly assigned actions, restart the preview conversation to apply your changes.

To remove an action from your agent, from the Topics panel of Agentforce Builder, click the name of the topic you want to remove an action from, and then select the **This Topic's Actions** tab. From the dropdown menu next to the action, select **Remove from Topic**.

Create a Custom Agent Action in the Legacy Builder

With custom actions, you can extend your agent with Salesforce functionality so that it's ready to assist users with tasks specific to your business. Build custom actions using Apex, flows, prompt templates, and API integrations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To create a custom agent action:	Manage AI Agents AND the required permissions for your agent type
To create or modify prompt templates:	Prompt Template Manager
To create or modify flows:	Manage Flow

Before you begin:

- Review the [considerations for custom actions](#).
- Create the underlying Salesforce functionality you want to use with your agent. When you create a custom action, you configure the functionality to use with your agent. You can create a custom action that calls invocable methods and REST Apex classes, external services, autolaunched flows, MuleSoft APIs, or prompt templates.

Access to a custom agent action depends on the type of Salesforce functionality it references. For example, if a custom action is built using a flow, the custom action adheres to the permissions, field-level security, and sharing settings configured in the flow. To run the action, the user or Agent User must have

the Run Flows permission and access to the specific flow, depending on the type of agent.

1. From Setup, in the Quick Find box, enter *Agent*, and then select **Agentforce Assets** to view all the actions in your Salesforce org.
2. Click **New Agent Action**.
3. From the Reference Action Type dropdown, select the type of functionality that you want to use to build your agent action, such as a flow or prompt template. Then select the category, if prompted, and the reference action.
4. The agent action label and API name are populated with the reference action name and API name. Review these fields and, if necessary, edit the values to accurately describe the action. Then click **Next**.
5. The instructions for the custom action and each input and output are populated with the descriptions from the reference action. Review these fields and make changes. See [Best Practices for Agent Action Instructions](#).

We copy over the descriptions from the reference action to give you a head start, but agent action instructions differ from traditional descriptions. An agent uses a large language model (LLM) and the reasoning engine to determine when to launch topics and actions in a conversation. The instructions for the action, inputs, and outputs tell an agent what your action does and when and how to use it. Effective instructions vary by action and use case. Plan to test and iterate on your instructions to ensure that your action performs as expected.
6. For each input and output, specify any applicable settings.

Setting	Details
Collect data from user	Require this parameter to be provided by the user.
Filter from agent action	When you create an agent action, all inputs and outputs from the reference action are added to the agent action. Enable this setting when you don't want to use a parameter from the reference action with your agent action. At least one output must be used with the agent action.
Require input	Require this parameter in order to execute the action. All other inputs are treated as optional. If an input is required by the reference action, this setting is enabled by default and read-only.
Show in conversation	<p>When this setting is enabled for some or all outputs, the outputs where the setting is enabled are included in the agent's response. On some channels, some outputs are converted to structured content (for example, the Agentforce panel in Lightning Experience recognizes record pages).</p> <p>When this setting is disabled for all outputs, the agent uses the LLM to summarize the outputs in natural language in the agent's response.</p>

Setting	Details
Show loading text for this action	<p>Show loading text in the agent conversation while the action is running in the background.</p> <p>For a custom action, you can specify the loading text for the action in the Loading Text field. In 1–3 words with no punctuation, tell your users what your action is doing. For example, “Crafting your email,” “Making updates,” or “Getting activity details.”</p> <p>When this setting is disabled, or when this setting is enabled but no loading text is specified, default loading text is shown. For example, “Working,” “Making progress,” or “Checking my notes.”</p> <p>To show loading text in enhanced Messaging channel conversations, additional configuration is required for Enhanced Chat and Bring Your Own Channel.</p>

 **Tip** When an action makes a change to a record, you can require an agent to ask the user to confirm the change before the agent can execute it. On the record page for the action, enable the **Require user confirmation** setting.

7. Click **Finish**.

After you create your action, [assign it to a topic](#) to add it to your agent.

To test your action and preview how the output appears in an agent conversation, open the agent in Agentforce Builder and start a preview conversation. Enter utterances that you expect to trigger your topic and action, and then adjust the agent action and topic instructions based on your results. Your action must be assigned to an agent to test it. Every agent that uses your custom action has its own independent copy of the action. You can update your custom action for a specific agent, and the updates won't be shared with any other agent.

[Best Practices for Agent Action Instructions](#)

Action instructions tell an agent what your action does and when to use it. When you create a custom action, carefully plan and test your instructions to ensure that your action performs as expected.

[Enhance Agent Action UI with Custom Lightning Types](#)

Customize the user interface (UI) for an agent action's input and output by using custom Lightning types.

See Also

[Video: Create Custom Agent Actions](#)

[Video: Debug Agent Actions](#)

[Trailhead: Agent Customization: Quick Look](#)

[Trailhead: Agent Customization with Flows](#)

[Trailhead: Agent Customization with Prompt Templates](#)

[Trailhead: Agent Customization with Apex](#)

Best Practices for Agent Action Instructions

Action instructions tell an agent what your action does and when to use it. When you create a custom action, carefully plan and test your instructions to ensure that your action performs as expected.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

The names and instructions for agent actions and their inputs and outputs determine when and how an action is used. AI agents use a large language model (LLM) and the reasoning engine to search through all topics and actions assigned to an agent and select one or more to execute in the conversation, based on the user's question or request. The more effective the instructions, the more predictably the action performs.

Effective instructions vary by action and use case. For best results, test your action in Agentforce Builder and iterate until your action meets your requirements.

Instructions for Actions

Action instructions describe what your action does and when to use it in a conversation. The most important element of action instructions is a concise natural language description of what your action does, usually one to three sentences written as an instruction to the LLM. The description can include the goal or task of the action, any use cases for the action, and the objects or records it uses or modifies. In general, the more relevant detail you include in your instructions, the easier it is for the LLM to differentiate between actions.

Example Agent Action	Less Effective Description	More Effective Description
Update Contact Phone Number	Updates a phone number.	Updates the user's phone number associated with their contact record. If no matching contact exists, creates a new contact record.
Query Records	Provides the ability to use natural language to query information about Salesforce CRM records.	Finds and retrieves Salesforce CRM records based on user input and specific conditions, such as field values. This action automatically identifies the correct records and object type.

Example Agent Action	Less Effective Description	More Effective Description
Track Order	Action to get tracking information for an order.	Returns tracking information for a customer order based on the tracking number and destination ZIP code.

 **Tip** LLMs work best when you use unique or varied language. When naming agent actions, instead of starting similar actions with the same verb (for example, “Get”), try a variety of related verbs (for example, “Get,” “Find,” “Identify,” “Retrieve”). When writing agent action instructions, remove or revise nonessential phrases that are repeated across multiple actions (for example, “This code snippet...,” “Provides the ability to...”).

In many cases, the natural language description is all that’s required for an agent to use your action as expected. However, some actions require more details after testing. Here are some options for refining your action description.

What to Include	When to Use	Examples
One to three utterances, or example customer inputs	<p>Include examples of customer messages that you expect to trigger your action to help the LLM match a given customer input to your action.</p> <p>If you include multiple utterances, minimize overlap.</p> <ul style="list-style-type: none"> Vary the length, grammar, and word choice of your utterances. If it makes sense for your use case, phrase one utterance as a statement and another as a question. Provide different utterances for the different ways your action can be used (for example, updating fields on a case versus an account or drafting versus revising an email). 	<ul style="list-style-type: none"> “What’s the address for the Acme account?” “Show me all open opportunities with a close date before 10/31/24.” “What’s your return policy?” “How do I fix an issue?” “What features does a product have?”
Dependent actions	<p>Some actions use other actions, often system actions, to get required information. If a required action is missing from a plan or actions aren’t being called in the right order, you can specify them by API name.</p>	<p>The action IdentifyRecordByName must be called directly prior to this action to get a single record ID as input.</p> <p>If the IdentifyRecordByName</p>

What to Include	When to Use	Examples
		action is part of the plan, it must run before GetRecordFieldsAndValues.
Examples of how you want the action to function	Examples don't generalize well, but they can be helpful when an agent makes a consistent mistake. In general, LLMs understand examples of what to do better than examples of what not to do, but you can test with either.	This action should be called only when a more specific summarization action isn't available.

Instructions for Inputs and Outputs

Instructions for inputs and outputs describe how to format and use the parameter. In the instructions for an input, specify what information is required to complete the action. In the instructions for an output, specify the result of the action and what an agent returns to the user.

LLMs don't have a complete understanding of context, including the Salesforce context. In other words, an LLM doesn't always know the number of characters in a Salesforce record ID or the names of Salesforce objects. Concise but detailed instructions help an agent retrieve necessary information and return relevant results. The best way to determine the right level of detail is to test and iterate on your instructions.

When writing instructions for an input or an output, consider:

- The data type of the information: “an 18-character ID,” “a rich-text answer to the user’s question.”
- Any specific fields or values: “contains the contact ID and expected delivery date”.
- How the information is retrieved or generated: “For a new email, retrieve the ID from the user's input. For a revised email, retrieve the ID from the conversation history.”
- Any special rules about how you expect the action to be used: “Don’t generate SQL or SOQL.”, “Required only when the user wants to revise an earlier draft.”, “The API name is used to identify Salesforce record field-value pairs from the user request.”

Here are some examples of effective instructions for inputs and outputs.

Input or Output Parameter	Instructions
recordId	The single ID of the Salesforce CRM record to create the summary for. For example: recordId, record_id, recordIds[0], accountId.
objectApiName	The API name of the Salesforce object (such as Account or Opportunity) associated with the record the user wants to find. The name can be

Input or Output Parameter	Instructions
	obtained from the context and doesn't require the IdentifyObjectByName action.
summary	The rich text summary created for the specified record.
searchResults	A list of the matching Salesforce CRM record IDs in descending order of relevance.
generatedEmail	A JSON object that contains the recipient ID, subject line, and body of the email.

Enhance Agent Action UI with Custom Lightning Types

Customize the user interface (UI) for an agent action's input and output by using custom Lightning types.

REQUIRED EDITIONS

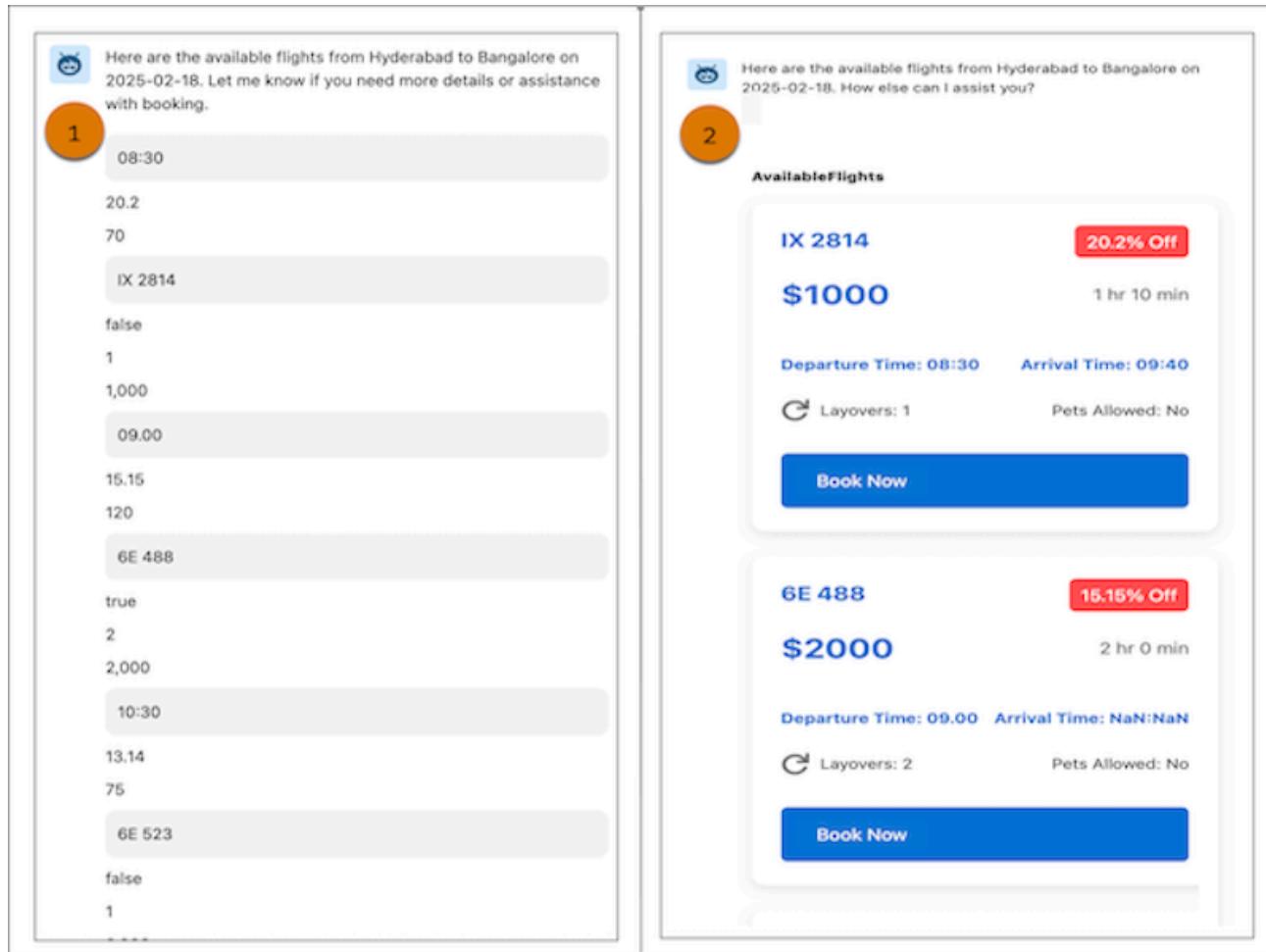
Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions. Access to some standard agent actions requires [additional add-on licenses](#).

By associating a Lightning web component (LWC) with your custom Lightning type, you can override the default UI to create a customized appearance for the agent's action inputs and outputs.

-  **Note** You can only override the default UI with a custom Lightning type for agent actions that use Apex classes as input or output.

The screenshots show how a custom Lightning type with a custom LWC can improve the UI for an agent action's output. Here's the default UI for output in an agent action (1) and the customized UI for output after you apply custom Lightning types (2).



Get Started with Custom Lightning Types

These resources are available to help you customize your agent's interface.

[Integrate a Custom Lightning Type with an Agent Action](#)

Connect a custom Lightning type to an agent action's input or output to apply your custom user interface.

See Also

- [Edit a Standard Topic in the Legacy Builder](#)
- [Add a Topic to Your Agent in the Legacy Builder](#)
- [Create a Custom Agent Action in the Legacy Builder](#)
- [Trailhead: Agentforce: Agent Planning](#)
- [Standard Lightning Types](#)
- [Custom Lightning Types](#)
- [Lightning Types](#)

Get Started with Custom Lightning Types

Get Started with Custom Lightning Types

These resources are available to help you customize your agent's interface.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions. Access to some standard agent actions requires [additional add-on licenses](#).

I want to...	Recommended Content
Understand the feature Learn what custom Lightning types are, how they work, and when to use them.	Custom Lightning Types Overview
Start building Create a new Lightning type in Setup and choose its definition method: Apex or Object.	Create a Custom Lightning Type
Use an Apex class Override the default input and output components for types that inherit structure from Apex.	Apex-Based Custom Lightning Types
Check compatibility Review limitations for Agentforce.	Considerations and Limitations for Custom Lightning Types
Integrate and Test Assign your custom Lightning type to an agent action and verify the behavior in Agentforce Builder.	Integrate a Custom Lightning Type with an Agent Action

Integrate a Custom Lightning Type with an Agent Action^[SEP]

Integrate a Custom Lightning Type with an Agent Action^[SEP]

Connect a custom Lightning type to an agent action's input or output to apply your custom user interface.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions. Access to some standard agent actions requires [additional add-on licenses](#).

1. Open the agent action that you want to edit.
2. Configure the rendering for the appropriate agent action input or output.
 - For the action's input, edit the **Input Rendering** parameter and select your custom Lightning type.
 - For the action's output, edit the **Output Rendering** parameter and select your custom Lightning type.
3. Save the agent action.

See Also

[Custom Lightning Type Examples](#)

Editing Standard Agent Action Reference Actions

Customize the behavior of some standard agent actions by editing the underlying flow or prompt template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

You can edit the reference actions for standard agent actions built on overridable flows and prompt templates. For most changes, the agent action automatically calls the active version of a flow or prompt template and the changes are picked up automatically. However, if you add or remove inputs or outputs from the reference action, you must create a custom agent action to replace the standard agent action and add your updated inputs and outputs.

For some standard agent actions that use prompt templates, there are other ways to customize the behavior of the action.

- When an agent action uses prompt templates of a specific type in Prompt Builder (for example, the Summarize Record action uses the Record Summary prompt type), you can create a prompt template of that type. For more details, see the reference documentation for the standard action you want to customize or create a prompt template for.
- You can create a custom template based on a standard template. Then create a custom agent action to call the custom template, and replace the standard agent action.

See Also

[Standard Agent Action Reference](#)
[Override a Standard Prompt Template](#)

Explore Standard Agent Actions

Learn all about the agent actions Salesforce provides out of the box in our comprehensive reference library.

See Also

[Standard Agent Action Reference](#)

Create a Filter to Control Access to Topics and Actions in the Legacy Builder

Create filters for topics and actions to make sure that your agent can use them in a conversation only when certain conditions are met. You can limit access based on any variable you specify. For agents on customer channels, we recommend using filters to require authentication for topics and actions that perform tasks for a user.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

User Permissions Needed	
To create and manage filters:	Manage AI Agents AND the required permissions for your agent type

Before you begin, from the Context panel, add any variables that you want to use in filter conditions to your agent.

- [Messaging Context Variables](#)
- [Custom Variables](#)

1. From the Agentforce Agents Setup page, launch your agent in Agentforce Builder.
2. If your agent is active, [deactivate it](#).
3. From the sidebar, select **Context**.
4. From the Context panel, select the **Filters** tab, and then click **New**.
5. Enter a name, API name, and description for your filter.
6. Specify whether any condition or all conditions must be met for an agent to use a topic or action with this filter applied.
7. To create a condition, specify a variable, an operator, and a value.
You can create multiple conditions. Context, conversation, and custom variables are supported.
8. Save your changes.

9. To use your filter, apply it to one or more topics or actions.
 - a. From the Topics panel, click the name of the topic that you want to modify.
 - b. To add the filter to the topic, on the topic's details panel, click  .
 - c. To add the filter to an action in the topic, select the **This Topic's Actions** tab, and then click the name of the action that you want to modify. On the action's details panel, click  .
 - d. Search for and select the filter that you want to apply, and then save your changes. Your filter is applied to the topic or action in this agent only.

To test your filter, restart the preview conversation to apply your changes.

To view the filters applied to a topic or action, or to add or remove a filter, from the Topics panel, open the details panel for that asset.

To edit or delete a filter, from the Context panel, select the **Filters** tab, and then open the filter that you want to modify. You can also view all of the assets that are currently using the filter.

See Also

[Video: Control Agentforce Decision-Making with Variables and Filters](#)

Variables

With variables, your agent can store and reuse values that help it with reasoning and interactions. Variables work differently in Agentforce Builder and the legacy builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

Variables

To improve security and ensure consistent agent behavior, use variables throughout your agent's reasoning and interactions, such as in filters, instructions, and logical expressions.

Variables in the Legacy Builder

To improve security and ensure consistent agent behavior, use variables in filters, instructions, and as input for actions. You can use variables to control how your agent uses topics and actions and to provide more information about a conversation.

Variables

To improve security and ensure consistent agent behavior, use variables throughout your agent's reasoning and interactions, such as in filters, instructions, and logical expressions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

A context variable, also called a linked variable, is mapped to an object field. For example, Agentforce Service agents include context variables that are mapped from Messaging Session object fields, including custom fields.

For example, this Agent Script defines a context variable that stores the messaging session record ID.

```
session_id: linked string
    description: "The messaging session ID"
    label: "Session ID"
    source: @MessagingSession.sessionID
```

A custom variable, also called a mutable variable, is unique to the agent that it's in, and it holds a value only during the conversation session. Custom variables can store one of these data types: string, number, list, object, boolean. By default, these variables are internal only, meaning that they can only be set in the agent. You can make them external, meaning that they can also be set with the Agent API.

For example, this Agent Script defines a custom string variable that stores a user's name.

```
user_name: mutable string = ""
    description: "The name of the user"
    label: "Name"
    visibility: "External"
```

Here are some Agent Script examples of how you can use variables throughout your agent's reasoning and interactions.

- Set a variable to an action input or output. The action uses the set variable's value as input, or stores the output value in the set variable.

```
run @action.Get_Order_Details
    with order_number=@variables.order_number
    set @variables.order_id=@outputs.order_id
```

- Use a variable in a filter.

```
get_order_details: @actions.Get_Order_Details
    available when @variables.verified == False
```

- Use variables in logical expressions.

```
if @variables.order_summary == "":
    run @actions.lookup_current_order
        with member_email=@variables.member_email
    set @variables.order_summary=@outputs.order_summary
```

- Set variable values.

```
set @variables.user_name = "New User"
```

- Use variable values in agent responses. For example, you can tell the agent to use a variable in a specific way in topic instructions.

| Refer to the user by the name {!@variables.user_name}.

Create Variables in Agentforce Builder

Use variables to store and reuse values in your agent's reasoning and control how an agent makes decisions. For example, when you assign a variable to an action input, your agent can use only the assigned variable to fill the value of the input.

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REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create a variable:

Manage AI Agents AND the required permissions for your agent type

1. From the App Launcher, enter *Agent*, and then select the **Agentforce Studio** app.
2. On the Agents tab, click the name of your agent.
3. On the Explorer panel, click **Variables**.
4. On the Variables page, click **New**.
 - a. To create a custom variable, click **Create Custom Variable**. In the New Variable window, define the variable's settings. By default, variables can only be set in the agent. To set the value of a variable with an API, select **Enable API write access**.
 - b. To add a context variable that's mapped to a Messaging Session object field, click **Add Messaging Session Variable**. Select the variables that you want to add and then click **Add to Agent**.

To create a variable that's set to an action output, select an action in the Actions Available For Reasoning section of a topic. Next to an action output, click **Select Variable** and then select **Create a variable**. In the New Variable window, define the variable's settings.

By default, action inputs are agent populated. To assign a specific variable to an action input, select an action in the Actions Available For Reasoning section of a topic. Then, next to an action input, click **Select Variable**.

To use a variable in topic instructions, use this format in natural language prompts:

`{ !@variables.VariableName }` . And use this format in logical expressions:

`@variables.VariableName` .

Variables in the Legacy Builder

To improve security and ensure consistent agent behavior, use variables in filters, instructions, and as input for actions. You can use variables to control how your agent uses topics and actions and to provide more information about a conversation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Required add-on licenses vary by agent type.

A context variable is mapped to an object field. If your agent can connect to customer channels, it includes context variables that are mapped from Messaging Session object fields, including custom fields. Context variables are prefixed with `$Context` and are typically read-only. The End User Language context variable is editable.

A conversation variable is unique to the agent it's in, and it holds a value only during the conversation session.

A custom conversation variable stores an action's output value. You can use a custom conversation variable in a filter or as input for an action. The variable can be a Boolean, Number, or Text data type.

Here are some ways you can use variables.

- Assign a context or custom conversation variable to an action input. When you assign a variable to an action input, your agent can only use the assigned variable to fill the value of the input. Action inputs must be one of these data types: Boolean, Number, Text.
- Map an action output to a variable. You can use the output value in filters and instructions. Action outputs must be one of these data types: Boolean, Number, Text.
- Use a variable in a filter. Filters ensure that your agent can use a topic or action only when a variable meets the filter conditions.
- Specify variable values with the Agent API and mention a variable in topic instructions.

For a context variable, use this format: `{!$Context.VariableAPIName}`. And for a conversation variable, use this format: `{!VariableAPIName}`.

Create a Custom Variable for Your Agent in the Legacy Builder

Control how an agent uses topics and actions by mapping an action output to a custom variable. For example, when you assign a variable to an action input, your agent can use only the assigned variable to fill the value of the input.

Standard Variable Reference for the Legacy Builder

Some agents include pre-built variables, called standard variables. Explore your agent's standard variables on the Context tab in the legacy Agentforce Builder.

See Also

[Video: Control Agentforce Decision-Making with Variables and Filters](#)

[Agentforce Developer Guide: Get Started with the Agent API](#)

[Agentforce Developer Guide: Send Agent Variables with the Agent API](#)

Create a Custom Variable for Your Agent in the Legacy Builder

Control how an agent uses topics and actions by mapping an action output to a custom variable. For example, when you assign a variable to an action input, your agent can use only the assigned variable to fill the value of the input.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create a custom variable:

Manage AI Agents AND the required permissions for your agent type

- From the Agentforce Agents Setup page, open your agent in the legacy builder. If your agent is active, [deactivate it](#).
- From the left sidebar, select **Context**.
- Click **New Variable**. Then, enter the variable's details and review the settings.
The variable's data type is based on the action output's data type.

Allow value to be set by API	Change the value of this variable with an API. If you're using this variable for verification or other security functions, consider keeping it hidden from APIs and don't select this option.
Allow LLM to use value	The agent can use the value of this variable to

	make decisions and generate conversational responses. If you're using this variable for verification or other security functions, consider keeping it hidden from the LLM and don't select this option.
Assign or Map This Variable	When you assign a context or custom conversation variable to an action input, your agent can only use the assigned variable to fill the value of the input. When you map an action output to a variable, you can use the output value in filters and instructions.

4. Save your changes.

To see details about the variable and where it's used, click its name on the Context panel in the legacy builder.

To assign the variable to an action input after creating it, go to an action input in the legacy builder. Then, from the Assign a Variable dropdown, select the variable.

To map an action output to the variable after creating it, go to the action output in the legacy builder. Then, from the Map to Variable dropdown, select this variable.

To remove a value from the variable, map an action output with an empty value to it.

Example: Improve Your Agent's Memory with Filters and Variables

Help your agent resolve common troubleshooting inquiries effectively with variables and filters. In this example, you create a variable that stores troubleshooting steps related to login issues and filters that control which actions the agent can use. The agent stores all of the troubleshooting steps in the variable. Then, it guides the customer through the troubleshooting process by delivering the most relevant step based on the conversation context.

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REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses](#)

vary by agent type.

USER PERMISSIONS NEEDED

To create and manage agents in Agentforce Builder: Manage AI Agents AND the required permissions for your agent type

To create and manage prompt templates in Prompt Builder: Prompt Template Manager permission set

- [Create an agent](#). If your agent is active, [deactivate it](#). For the best results, use an Agentforce Employee agent.
- If you haven't worked in Prompt Builder, see [Prompt Builder](#).

Guide users through troubleshooting processes, step-by-step. In this example, the Get Troubleshooting Steps action retrieves login issue troubleshooting steps and stores them in the Troubleshooting Steps variable. Then, the Troubleshooting Step By Step action helps the agent deliver these steps incrementally based on the customer's responses. The No Steps and Yes Steps filters make sure that the agent can only use the actions when the Troubleshooting Steps variable meets specific conditions.

This example uses generative AI in prompt executions and uses Data Cloud to ingest, store, and process data. Use of agents impacts your credit consumption of several usage types. Work with your Salesforce account team to confirm license availability and plan credit usage.

See Also

[Agentforce Developer Guide: Send Agent Variables with the Agent API](#)

Create Prompt Templates

Create two flex prompt templates. The first gives the agent a list of troubleshooting steps, and the second tells the agent to store the remaining steps only. Later, you create custom agent actions that reference these prompt templates.

To learn more about free text merge fields and flex prompt templates, see [Add Free Text Inputs to a Flex Prompt Template](#).

1. For the first flex prompt template, enter the name `Get Troubleshooting Steps`. Then, enter this text in the Prompt section and replace the `{!$Input:AllTroubleshootingSteps}` placeholder with a free text merge field. When you're ready, save and activate the prompt template.

Below is the complete list of all troubleshooting steps. Use the list to populate `{!$Input:AllTroubleshootingSteps}`. Use the complete list one time only at the beginning of the conversation. Only use information from the complete list of troubleshooting steps.

###

Complete list of troubleshooting steps:

1. Before you attempt any other troubleshooting, confirm that you have entered your username and password correctly and with no typos. Many login issues are caused when there is a typo in your username or password. Passwords are case sensitive and must be at least 8 characters in length.

2. If you don't know your password, reset your password. You will be prompted to answer your security question, and once you enter correctly, you will be emailed a link that can be used to set up a new password.

3. Make sure that your browser does not block cookies. If your browser allows cookies but you still can't log in, clear your cache and cookies before trying again.

4. If you still can't log in after trying the above steps, reach out to your System Administrator for assistance.

##

2. For the second flex prompt template, enter the name **Troubleshooting Step By Step**. Then, enter this text in the Prompt section. Replace the `{!$Input:TroubleshootingSteps}` and `{!$Input:UserInput}` placeholders with free text merge fields. When you're ready, save and activate the prompt template.

You are a service agent. You are in the middle of solving an issue for a customer and have the following steps to follow to solve the issue: `{!$Input:TroubleshootingSteps}`. You are only allowed to give one step at a time from this sequence of steps the one that is the most suitable to address this question from the customer: `{!$Input:UserInput}`. Only respond to the user with the most suitable step.

Create Custom Agent Actions

Create two custom agent actions that help the agent store troubleshooting steps in the Troubleshooting Steps variable and send relevant steps to the end user.

To learn more about custom agent actions, see [Create a Custom Agent Action](#).

1. On the Agentforce Assets Setup page, select the **Actions** tab. Then, to create a custom action, click **New Agent Action**.
2. For the first action, enter these properties.
 - a. Reference Action Type: Select **Prompt Template**
 - b. Reference Action: Select **Get Troubleshooting Steps**
 - c. Agent Action Instructions: *Retrieves all the troubleshooting steps for the troubleshooting guide.*
 - d. Loading Details: *Finding troubleshooting steps*
 - e. AllTroubleshootingSteps input instructions: *An ordered list of all the troubleshooting steps.*

3. For the second action, enter these properties.
 - a. Reference Action Type: Select **Prompt Template**
 - b. Reference Action: Select **Troubleshoot Step By Step**
 - c. Agent Action Instructions: You are in the middle of solving an issue for a customer and have the following steps to follow to solve the issue:
TroubleshootingSteps. You are only allowed to give one step at a time from this sequence of steps the one that is the most suitable to address this question from the customer: *UserInput*. Only respond to the user with the most suitable step.
 - d. Loading Details: Getting the next step
 - e. UserInput input instructions: A string provided by the user with a question or issue that needs to be solved. Select **Require input**.
 - f. TroubleshootingSteps output instructions: An ordered list of the remaining troubleshooting steps. Select **Show in conversation**.

Create a Custom Agent Topic

Create a custom agent topic that helps the agent use the Get Troubleshooting Steps and Troubleshoot Step By Step actions to address troubleshooting inquiries.

To learn more about custom agent topics, see [Create a Custom Topic in the Legacy Builder](#).

1. From the Agentforce Agents Setup page, open your agent in Agentforce Builder.
2. On the Topics tab, Create a custom agent topic with these properties. Later, you create the variable that the topic instructions mention.
 - a. Name: *Troubleshooting Inquiries*
 - b. Classification Description: This topic initiates a step-by-step troubleshooting process when a customer describes a technical issue, an error, or a problem that needs to be fixed.
 - c. Scope: Your job is only to guide a user through a multi-step troubleshooting process by first retrieving a complete set of instructions and then providing them one step at a time. You must manage the conversation over multiple turns based on user feedback after each step. Do not address issues outside of the documented troubleshooting procedures.
 - d. Instructions:

Use the Get_Troubleshooting_Steps action to retrieve the complete troubleshooting guide and populate the TroubleshootingSteps variable. Use this action one time only at the beginning of the conversation.

After using the Get_Troubleshooting_Steps action, use the Troubleshoot_Step_By_Step action to get the first step. Then instruct the user to perform the step and report back on the result. For example: "Okay, let's start with the first step: [Insert first step here]."

For each subsequent reply from the user, refer to the `Troubleshooting_Steps` variable. Present the next step to the user.

Continue the loop until the user confirms the issue is resolved or the `Troubleshoot_Step_By_Step` action indicates there are no more steps.

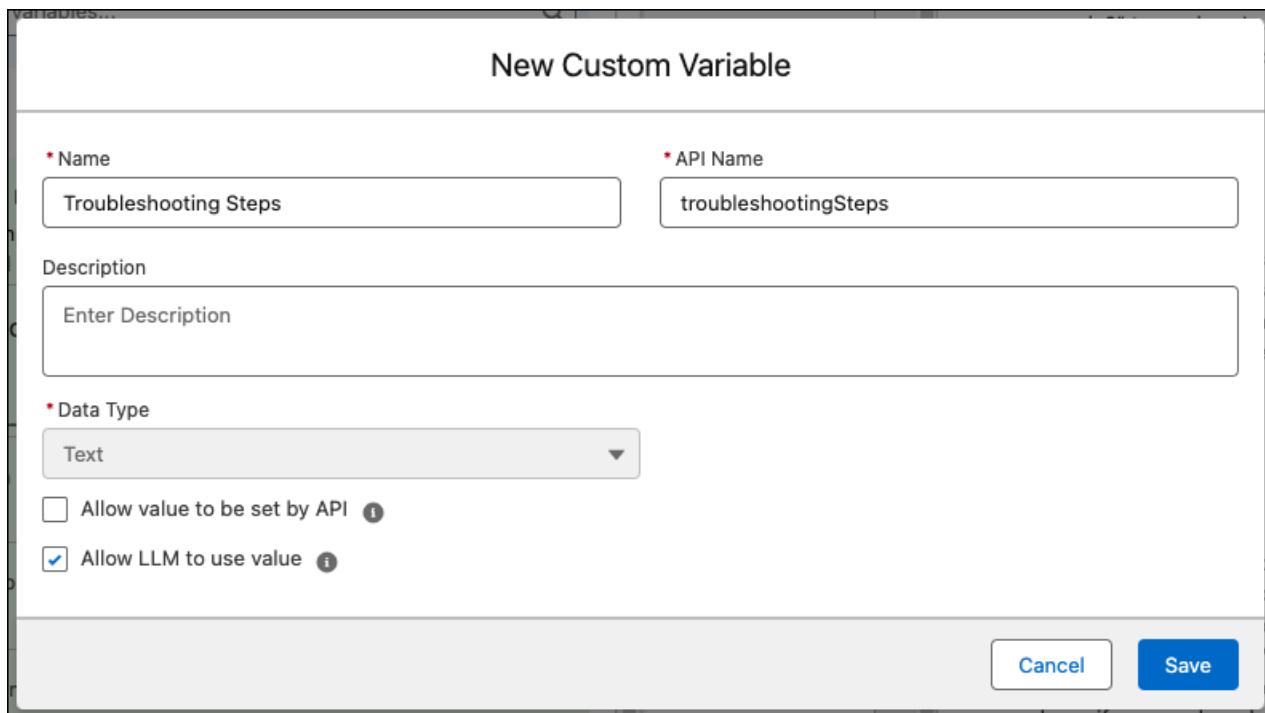
- e. Include the Get Troubleshooting Steps and Troubleshoot Step By Step agent actions in the topic.

Create a Custom Variable

Create a custom variable that stores the troubleshooting steps. With variables, an agent can store and reuse specific information throughout a conversation. In this example, a variable stores the output of the Get Troubleshooting Steps action.

To learn more about custom variables, see [Create a Custom Variable for Your Agent in the Legacy Builder](#).

1. From the Agentforce Agents Setup page, open your agent in Agentforce Builder.
2. On the Topics panel, select the **Troubleshooting Inquiries** topic and then click the **This Topic's Actions** tab.
3. Select the **Get Troubleshooting Steps** action. Then, map the Prompt Response action output to a new custom variable.
4. For the name of the variable, enter `Troubleshooting Steps`. Select **Allow LLM to use value** and then save the variable.



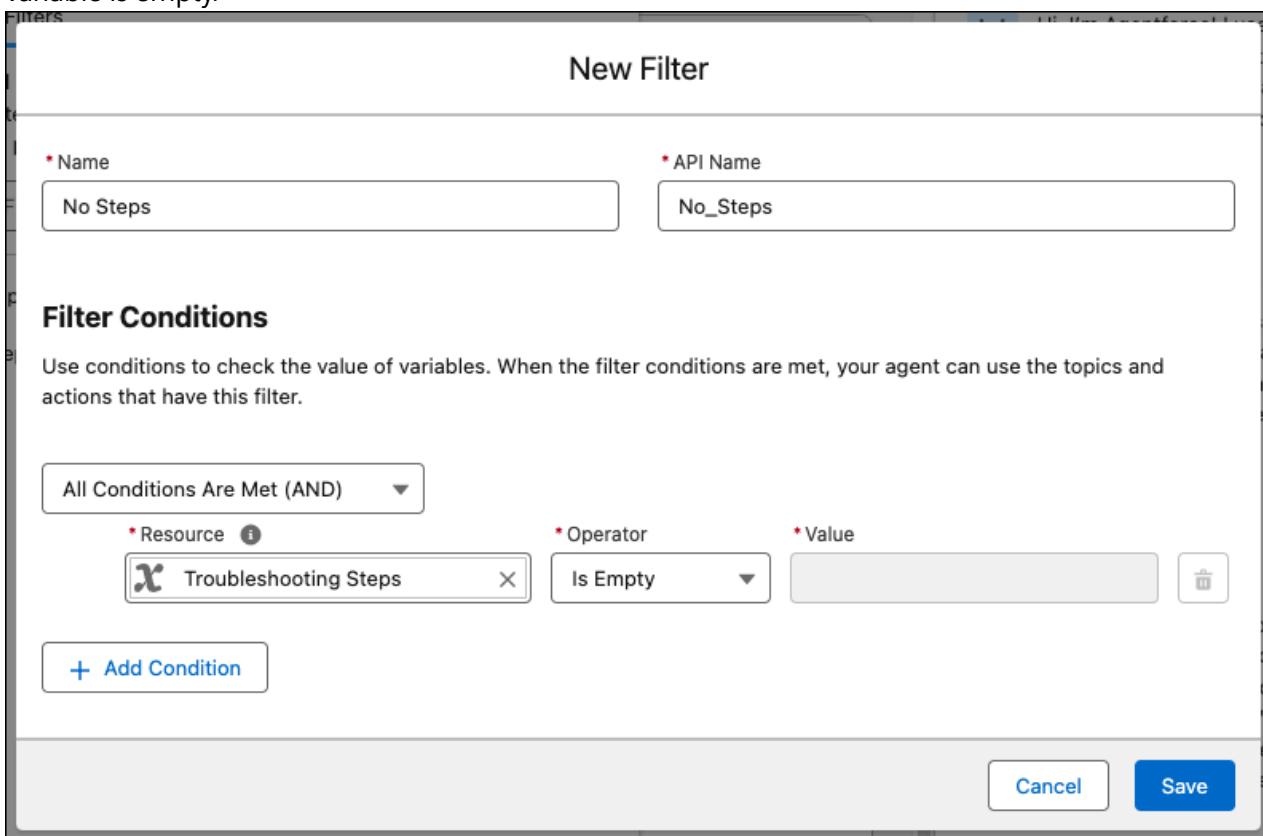
To use variables from the API, see [Send Agent Variables with the Agent API](#).

Create and Add Action Filters

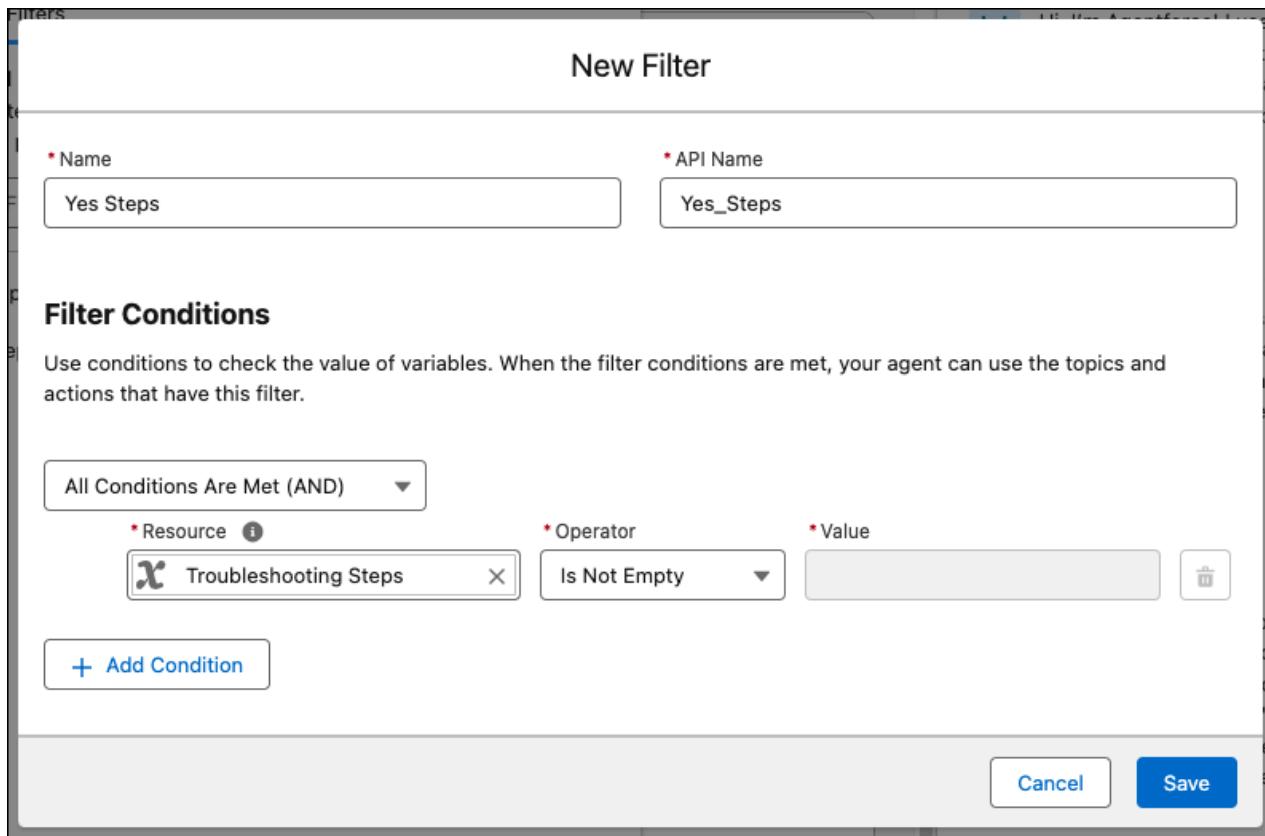
Create two filters that tell the agent when to use the actions that you created. Unlike topic or action instructions, filters are deterministic and applied consistently across agent conversations. In this example, the filters ensure that an action runs only when the Troubleshooting Steps variable meets the specified conditions.

To learn more about filters, see [Create a Filter to Control Access to Topics and Actions in the Legacy Builder](#).

1. From the Agentforce Agents Setup page, open your agent in Agentforce Builder.
2. On the Context panel, select the **Filters** tab. To create a filter, click **New**.
3. For the first filter, enter the name *No Steps*. For the conditions, check that the Troubleshooting Steps variable is empty.



4. For the second filter, enter the name *Yes Steps*. For the conditions, check that Troubleshooting Steps variable is not empty.



5. Select the **Topics** panel. On the This Topic's Actions tab of the Troubleshooting Inquiries topic, select the **Get Troubleshooting Steps** action. On the action's details panel, click and then select the **No Steps** filter.
6. On the This Topic's Actions tab of the Troubleshooting Inquiries topic, select the **Troubleshooting Step By Step** action. On the action's details panel, click and then select the **Yes Steps** filter.

To test your agent, refresh the preview conversation, and then ask the agent for troubleshooting assistance. The agent uses the variable and filters to send the most relevant troubleshooting steps only.

A sample preview conversation with an Agentforce Employee agent:

Conversation Preview

() ()

 Hi, I'm Agentforce! I use AI to search trusted sources, and more. Ask me "What else can you do?" to see how I can simplify your workday. How can I help?

 i can't log in

 Let's start by checking if you've entered your username and password correctly, with no typos. Remember, passwords are case sensitive and must be at least 8 characters long. Give it a try and let me know if it works!

() () ()

 i checked but still can't log in

 Alright, let's move on to the next step. If you don't know your password, try resetting it. You'll need to answer your security question correctly, and then you'll receive an email with a link to set up a new password. Let me know if you need any help with this process!

() () ()

 i reset my password but still can't log in

 Next, let's make sure your browser isn't blocking cookies. If cookies are allowed but you're still having trouble, try clearing your cache and cookies before attempting to log in again. Let me know how it goes!

() () ()

Describe your task or ask a question...

+

>

321

Standard Variable Reference for the Legacy Builder

Some agents include pre-built variables, called standard variables. Explore your agent's standard variables on the Context tab in the legacy Agentforce Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

Standard Context Variables

Variable API Name	Data Type	Description	Mapped Object Field
\$Context.EndUserLanguage	Text	The language code of messages sent by the messaging user. For example, en_US. This variable is editable.	MessagingSession.EndUserLanguage
\$Context.EndUserContactId	Id	The ID of the Contact record associated with the messaging user.	MessagingEndUser.ContactId
\$Context.RoutableId	Text	The ID of a session on a Messaging channel.	MessagingSession.Id
\$Context.MessagingEndUserId	Id	The ID of the messaging user.	MessagingSession.MessagingEndUserId

Other Standard Variables

Variable API Name	Data Type	Description
verifiedCustomerId	Id	The ID of the messaging user that's verified using the Verify Customer agent action. See Control

Variable API Name	Data Type	Description
		Access to Topics and Actions with the Customer Verification Topic.

To use standard variables with custom actions, use the Get Agent Context invocable action. For example, add the Get Agent Context action in a flow and have it store the value of standard variables.

See Also

[Agentforce Developer Guide: Get Started with the Agent API](#)

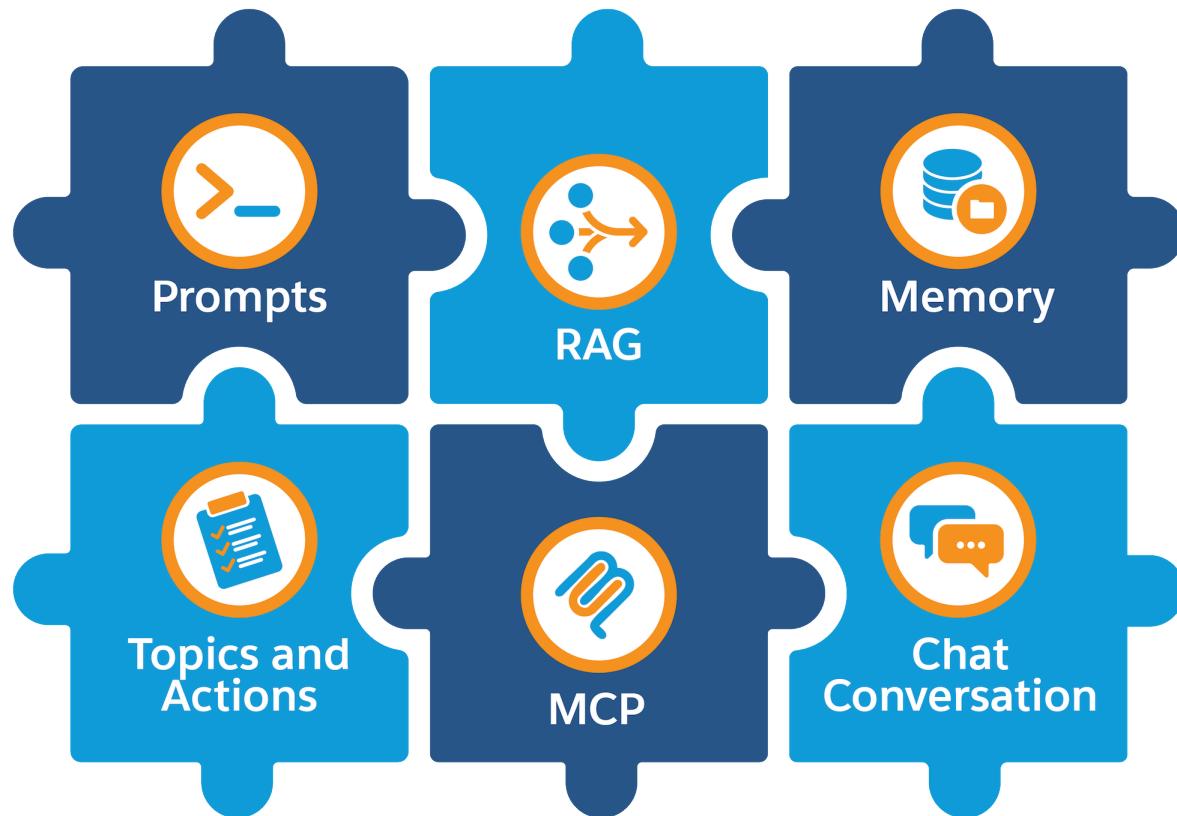
[Agentforce Developer Guide: Send Agent Variables with the Agent API](#)

An Agentforce Guide to Context Engineering

Context engineering is the art and science of giving your AI agent the right information, tools, and instructions to achieve its goals.

While prompt engineering focuses on direct instructions and RAG (Retrieval Augmented Generation) focuses on retrieving the right content, context engineering encompasses the full perspective of everything available to your model.

Sample Context Components



Let's highlight a few key components of the context.

- **Prompts and Instructions:** The context includes the instructions to the agent, such as the instructions found in each [topic](#) and the user's prompts.
- **Actions and Tools:** The capabilities your agent can use also affect the context, such as running [flows](#), calling [Apex](#) actions, or using [prompt templates](#).
- **Data Inputs:** The context includes relevant information that your agent obtains from structured and unstructured sources, including CRM data, [Data 360](#), [knowledge articles](#), uploaded documents, [Slack](#), and other data sources.
- **Memory:** Both short-term (current conversation) and long-term (past interactions) memory can be part of the context.

The goal of context engineering is to optimize and tune this context to give the model the best chance at solving the problem. Getting context engineering right helps you avoid common AI agent problems like:

- **Context Clash:** Conflicting instructions, which can lead to unexpected performance or even errors.
- **Context Confusion:** Too much irrelevant content or too many unnecessary tools, which can cause your agent to behave inconsistently and increase agent latency.
- **Context Poisoning:** Incorrect or outdated information, which can affect users' trust and adoption of your agent.

Any of these issues can reduce the accuracy and effectiveness of your agents. It's critical to give your AI model the right information in the right way to get the right answers.

Now let's discuss the steps to build reliable and effective Agentforce solutions by using some context engineering best practices.

1. **Define Clear Objectives.** Clearly state what your Agentforce agent should achieve. This step can help solidify your decisions across the rest of the process.
2. **Limit, Filter, and Route Topics Effectively.** Optimize and limit [topics](#) and [actions](#) to the essential jobs and tools needed for your agent. After you have the right list of topics, use topic classification effectively so that the agent is routed to the right topic for the job.
 - **Limit Topics.** Assign only the most essential topics and actions to your agent. Add topics gradually as needed.
 - **Filter Topics.** Use filters to control access to topics (using the Topic Selector in Canvas view or the `start_agent` topic in Script view).

This screenshot demonstrates topic filtering in Canvas view. These instructions use variables to filter out topics that aren't applicable.



And here's what the same filtering looks like in Agent Script.

```
start_agent topic_selector:  
    description: "Welcome the user and determine the appropriate topic bas  
ed on user input"  
    reasoning:  
        instructions: |  
            You are a topic selector for this assistant. Welcome the guest  
            and analyze their input to determine the most appropriate topi
```

```

c
    to handle their request.

actions:
    go_to_identity: @utils.transition to @topic.Identity_Verification
        description: "Verifies user identity"
        available when @variables.verified == False
    go_to_order: @utils.transition to @topic.Order_Management
        description: "Handles order lookup, refunds, and order updates."
        available when @variables.verified == True
    go_to_faq: @utils.transition to @topic.General_FAQ
        description: "Handles various frequently asked questions."
        available when @variables.verified == True
    go_to_escalation: @utils.transition to @topic.Escalation
        description: "Handles escalation to a human rep."
        available when @variables.verified == True and @variables.is_business_hours == True

```

See [Topic Classification and Routing](#).

- **Route Topics with Logic.** Use explicit references to topics to deterministically route from one topic to another, under certain conditions.

This example illustrates how you can use logic instructions to strategically route from one topic to another.



```

start_agent topic_selector:
    reasoning:
        instructions:->
            if @variables.approval_required:
                transition to @topic.approval_workflow
            else:
                transition to @topic.management_workflow

```

See [How Topic Instructions are Resolved to Build a Prompt](#) in [Salesforce Help and Reasoning Instructions](#) in the Agent Script Developer Guide.

3. **Review Your Actions.** Make sure that each topic has relevant and effective actions to help complete the job.

Keep in mind that some actions ([flows](#), [Apex](#) methods, APIs) are more deterministic, whereas actions that use AI models are more probabilistic ([prompt templates](#)). See [Agent Actions](#).

You should also think about how and when you want to use an action. For tips on how to do this, see [Balance Probabilistic and Deterministic Behavior](#) in the next step.

4. **Tune Your Topic Instructions.** Whether you're [building agents in Canvas view](#) or [building them directly](#)

with [Agent Script](#), one of the most powerful ways to optimize the context is from your topics' reasoning instructions. There are several aspects to these instructions that are critical for the context.

- **Review the Runtime Flow.** Before making too many changes to your instructions, ensure that you understand the runtime behavior of an agent so you know which instructions get included in the context. See [How Agents Work](#) and [How Topic Instructions are Resolved to Build a Prompt](#). Developers can also refer to [Flow of Control](#) in the Agent Script Developer Guide.
- **Use Variables to Store Data.** Specify relevant data in variables so that you can use them directly in your instructions.

This screenshot shows a variable definition in Canvas view.



And this code sample shows the same variable in Script view.

```
user_name: mutable string = ""
description: "The name of the user"
label: "Name"
visibility: "External"
```

There are several ways to effectively use variables to perform actions. This example demonstrates how to use a variable to filter an action.

```
get_order_details: @actions.GetOrderByOrderNumber
available when @variables.verified == True
```

And this example demonstrates how to use variables for action inputs and outputs.

```
run @actions.GetOrderByOrderNumber
with order_number = @variables.order_number
set @variables.order_details = @outputs.orderDetails
```

You can use variables throughout your agent definition. See [Variables](#).

- **Balance Probabilistic and Deterministic Behavior.** Your topic instructions include both logic-based instructions and prompt-based instructions. Take advantage of the logic in your instructions for critical business workflows to increase predictable, deterministic behavior. For example, before the prompt-based instructions run, you can check the loyalty tier for a user, use conditional logic to determine whether to thank a user for being a gold tier member, use a variable to customize the prompt, run an action to send an email. You can then focus the natural language prompt on what an AI model does best, without overloading the model's context with unnecessary and unpredictable logic instructions.

This sample demonstrates how to use logic-based instructions. In these instructions, we check a variable to see if the customer is ready to book a hotel. If so, we get account information using variables for the action inputs and outputs. We then run another action to get hotel info.

```
if @variables.ready_to_book:
```

```

run @actions.get_account_info
  with account_id = @variables.account_id
    set @variables.hotel_code = @outputs.hotel_code
run @actions.get_hotel_info
  with hotel_code = @variables.hotel_code
    set @variables.hotel_info = @outputs.hotel_info

```

See [How Topic Instructions are Resolved to Build a Prompt](#) in [Salesforce Help and Reasoning Instructions](#) in the Agent Script Developer Guide.

- **Reference Resources Directly.** Whether you're building agents in Canvas view or Script view, you can directly reference topics, actions, and variables in your instructions. This feature takes the ambiguity out of your instructions because you can specifically "@ mention" resources. This sample illustrates some of the ways to reference resources in your instructions.



```

instructions: |
  Refer to the user by name @variables.member_name.
  Show their current order summary: @variables.order_summary
  when conversation starts or if requested.
  If they want past order info, ask for Order ID or Restaurant Name
  and use @actions.lookup_order.
  If they ask for a service agent or seem upset, use @actions.go_to_escalation.
  If they want to make a return, confirm Order ID and use @actions.create_return.
  If returns are not eligible, explain politely.

```

See [Building Agents in Canvas View](#) or [Get Started with Agent Script](#).

5. **Use Accurate, Relevant Data.** Ensure that your inputs are based on the best possible information.
 - **Structured data**, such as CRM data, [Data 360](#) data, external data, and other sources, must be correct, up to date, and relevant to the decision or task at hand. See [Strategies for Data Quality](#) in Trailhead.
 - **Unstructured data**, such as data libraries and other input obtained with [RAG](#), must be accurate and directly relevant to user requests. Successful RAG inputs start with a knowledge store of well-curated, high-quality content that's accurate, complete, current, organized, and consistent. Other considerations include: search strategy ([hybrid](#) or [vector](#) search), content [parsing and pre-processing](#), [search index optimization](#), a well-tuned [chunking strategy](#), and using [knowledge/RAG quality data and metrics](#) to identify areas to improve.
6. **Ensure Consistency.** Eliminate contradictions across [prompts](#), [topics](#), [actions](#), [RAG](#) data, instructions, and Salesforce configuration.
7. **Test, Iterate, Refine.** [Preview your agent in Agentforce Builder](#). Build tests with [Agentforce Testing Center](#) and [monitor your agents](#) with analytics. Use feedback from conversation transcripts to refine your context. Be sure to re-test your agents when any aspect of your solution changes, such as a model update.

By carefully managing your agent's context, you can build reliable and effective AI solutions with Agentforce.

See Also

- [How Agents Work](#)
- [Agentforce Developer Guide: Get Started with Agent Script](#)
- [Trailhead: Prompt Engineering Techniques](#)
- [Trailhead: Agentforce: Agent Planning](#)
- [Trailhead: Unstructured Data in Data 360](#)
- [Trailhead: AI Strategy](#)

Test Your Agent

Test and improve your agents. To track the events and user messages sent in an agent conversation, turn on enhanced event logging. Use this conversation data to help troubleshoot agent issues. For more comprehensive testing, generate and test batches of utterances in Agentforce Testing Center.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

[Enable Enhanced Event Logs](#)

Event logs capture the events and user messages in an agent session to help you test and troubleshoot your agent. In supported agent types, enable enhanced event logs to store conversation data and view all session activity in one place. Without enhanced event logs user messages sent to the agent aren't included in the event logs although the message event is still included.

[Preview and Test in Agentforce Builder](#)

Testing your agent is an essential step in creating an agent that you can trust. With Agentforce Builder, you have a few ways to test your agent and tools ready to help you understand the test results and make changes.

[Agentforce Testing Center](#)

Build confidence in your AI agents and deliver seamless, effective interactions with thorough testing. Easily generate custom test scenarios and leverage our expert evaluation tools to assess response accuracy, conversation quality, topic recognition, action execution, and knowledge retrieval. Identify issues early and fine-tune your agent's behavior with precision.

[Troubleshooting Agents](#)

Solve common agent issues.

Enable Enhanced Event Logs

Event logs capture the events and user messages in an agent session to help you test and troubleshoot

your agent. In supported agent types, enable enhanced event logs to store conversation data and view all session activity in one place. Without enhanced event logs user messages sent to the agent aren't included in the event logs although the message event is still included.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To enable enhanced event logs: Manage AI Agents AND the required permissions for your agent type

Event logs store key details about each session to help you interpret the session activity.

Column	Description
Connection	Indicates the channel of the agent session.
Dropped	Indicates that the session ended for a reason other than the user ending it, such as a timeout or error.
Duration	Indicates the length of the agent session.
Error	Indicates that an error occurred in the session.

Enable enhanced event logs to view user messages as well as agent messages and events. View more information about the session, including any errors, when you click the session ID. While enhanced event logs aren't required for Agentforce Testing Center or Agent Builder, they can add valuable context for testing and we recommend you enable them as part of your overall testing strategy.

To use event logs, [verify Data 360 in your org and turn on Einstein data collection and storage](#). Event logs store information for seven days and consumes Data 360 credits. See [Generative AI Usage and Billing](#)

1. From Setup, in the Quick Find box, enter and then select **Agentforce Agents**.
2. Select your agent.
3. Click the edit icon next to **Keep a record of conversations with enhanced event logs to review agent behavior**.
4. Select **Keep a record of conversations with enhanced event logs to review agent behavior**.
5. Save your changes.

See Also

[Video: View Agentforce Conversation Logs](#)

Preview and Test in Agentforce Builder

Testing your agent is an essential step in creating an agent that you can trust. With Agentforce Builder, you have a few ways to test your agent and tools ready to help you understand the test results and make changes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

When testing, you can select from two different test modes: Simulate and Live Test. Which you use depends on a few factors.

Simulate mode is a great way to check to make sure that your agent is set up correctly. It checks that your agent has the correct configurations and behaves the way you want. This mode doesn't check for things like agent user validation or action execution, nor does it change Salesforce data.

Live Test mode is best for testing that the tools your agent needs are set up correctly. It tests the actions and your agent's ability to run them successfully. This type of testing does modify Salesforce data.

To use either mode, open Builder and click **Preview**.

[Simulate and Live Test Modes](#)

Agentforce Builder includes two different modes to test your agent: Simulate and Live Test. Simulate mode helps you verify that your agent has the right configuration without risking any changes to your actual data or org. Live Test mode actually runs the actions and changes your org so you can see how the agent performs when it's active.

[Test Your Agent in Agentforce Builder \(Beta\)](#)

Manually testing your agent in Agentforce Builder provides a detailed, step-by-step trace of your agent's interactions and processes. Use the Preview panel to chat with your agent, then review the agent's topic selection, action execution, and reasoning on the Interaction Summary panel. You can get more details about any of the steps by conversing with the Agentforce Assistant.

Simulate and Live Test Modes

Agentforce Builder includes two different modes to test your agent: Simulate and Live Test. Simulate mode helps you verify that your agent has the right configuration without risking any changes to your actual data or org. Live Test mode actually runs the actions and changes your org so you can see how the agent performs when it's active.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.



Simulate Mode

Simulate mode offers a risk-free testing space. It's designed to check the agent's setup—including its underlying logic and workflow—without changing your data. Use this mode to verify that the agent is selecting the right topics and actions and responding how you want it to.

You can modify the draft agent version while in Simulate mode. To change a committed agent version, create a version and modify that. Working in this mode enables quick adjustments, troubleshooting, and confirmation of fixes or new logic. It's the best place to confirm the agent's initial configuration and validate all setup parameters. When you're confident your agent is behaving as expected, you're ready to move to Live Test mode.

Live Test Mode

Live Test mode is designed to test the agent's performance and behavior under conditions that are similar to the production environment. When you're testing in this mode, the agent behaves as if it's activated. The tests check its ability to run topics and perform actions and it actively updates Salesforce data. This step is important for a complete check of actions and confirming that data is correct and system integration is working well.

Test Your Agent in Agentforce Builder (Beta)

Manually testing your agent in Agentforce Builder provides a detailed, step-by-step trace of your agent's interactions and processes. Use the Preview panel to chat with your agent, then review the agent's topic selection, action execution, and reasoning on the Interaction Summary panel. You can get more details about any of the steps by conversing with the Agentforce Assistant.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To test agents in Agentforce Builder:

Manage AI Agents AND the required permissions

USER PERMISSIONS NEEDED

for your agent type

1. Click **Preview**.
2. Select your [test mode](#).
3. To specify the context of an agent conversation, click **Set Context** on the Preview or Interaction Summary panels, or open the Variables tab and edit the variable values. 
4. In the Preview panel, enter your utterance.
5. Check the agent's reasoning and behavior in the Interaction Summary panel. 
6. To get more information about what your agent did:
 - a. Click **Ask Agentforce** in the summary box. We send the information in the summary to the assistant and you can ask it questions or request modifications.
 - a. If you're looking for more technical details, such as the length of time each stage took, click the item in the Interaction Summary panel to see the trace data. Click a line item to open a tab with all the details. To include system events, click the link at the bottom of the panel. 
7. To fix errors and make updates to your agent, you can:
 - a. Ask the assistant to make updates for you. You can accept or reject the changes it offers.
 - a. Make updates yourself either in the canvas or in the script. If your agent version is committed, make a new version of it first and modify that.
8. To test your changes, refresh the session by clicking the refresh button on the preview panel.

Agentforce Testing Center

Build confidence in your AI agents and deliver seamless, effective interactions with thorough testing. Easily generate custom test scenarios and leverage our expert evaluation tools to assess response accuracy, conversation quality, topic recognition, action execution, and knowledge retrieval. Identify issues early and fine-tune your agent's behavior with precision.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

Important

- Running tests consumes requests and credits. See [Considerations for Testing Center](#).
- Testing agents can modify CRM data. To avoid issues, be sure to use Testing Center only in your sandbox environment.

Watch the video: <https://play.videyard.com/UAtqTg67xRFS6jeAuZHt8w>

With Testing Center, you can quickly generate test cases from your agent's core topics and actions, create Q&A style tests from your knowledge content, or upload custom scenarios tailored to your specific

needs. Because AI agents are non-deterministic, it's essential to test them across a wide range of scenarios to ensure consistent and accurate performance.

Testing Center supports large-scale batch testing through a range of evaluations. These include response accuracy, topic and action validation, and key quality metrics such as completeness, coherence, conciseness, latency, and instruction adherence. By surfacing patterns and edge cases often missed in smaller-scale testing, you'll get a fuller picture of your agent's performance. With these insights, you can close performance gaps, refine topic instructions, and continuously improve your AI agent's responses.

Set Up and Run Tests in Agentforce Studio (Beta)

Experience a more flexible, AI-driven testing workflow with Testing Center in Agentforce Studio (beta). Build test cases, manage test suites, and track test history, all in a spreadsheet-inspired interface that makes it easier to validate and debug agent conversations. Fast-track testing with AI-generated scenarios for specific topics and actions, or data linked through an Agentforce Data Library, or manually craft and upload your own. Then select evaluations to run on your test cases or develop your own custom evaluations for your business needs.

Set Up and Run Tests in Setup (Legacy)

Efficiently validate your agent's performance at scale, whether you want to fast-track testing with AI-generated scenarios or manually craft and upload your own. You can generate realistic test cases for specific topics and actions, or data linked through the Agentforce Data Library.

Use the Test Results

Once your tests finish running, you'll see overall metrics for the test suite along with evaluation scores for each test. Use these results to identify failed or low-scoring utterances, then manually retest them in Agentforce Builder. Refine the instructions within your topics and actions, and iterate until you're satisfied with the responses. Pay close attention to recurring failures as these results can help uncover underlying issues such as unclear guidance, missing knowledge, or configuration issues. To interpret your results, see how each evaluation helps to measure agent performance.

Considerations for Testing Center

To use Testing Center, consider supported functionality, usage, limitations and allowances, limits, and other issues.

See Also

[Trailhead: Agentforce Testing Tools and Strategies](#)

[Trailhead: Agentforce Testing Center](#)

[Agentforce Testing Center Considerations](#)

Set Up and Run Tests in Agentforce Studio (Beta)

Experience a more flexible, AI-driven testing workflow with Testing Center in Agentforce Studio (beta). Build test cases, manage test suites, and track test history, all in a spreadsheet-inspired interface that makes it easier to validate and debug agent conversations. Fast-track testing with AI-generated scenarios for specific topics and actions, or data linked through an Agentforce Data Library, or manually craft and upload your own. Then select evaluations to run on your test cases or develop your own custom evaluations for your business needs.

REQUIRED EDITIONS

	New Testing Center in Agentforce Builder (beta)
This article applies to:	
	Legacy Agentforce Testing Center in Setup
This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create tests in the Testing Center:

Manage AI Agents AND the required permissions for your agent type

Create a Test Suite

Fast-track your testing with AI-generated testing scenarios or create and upload your own. Test your agents against topics and actions or data available via an Agentforce Data Library.

Define Test Conditions

When you upload test cases from the CSV template, defining test conditions such as conversation history and context variables helps provide context. These variables help simulate more realistic user interactions, making your tests more reliable and reflective of actual agent behavior.

Select Your Test Data

Evaluate your agent's performance by using AI-generated test cases or uploading your own test cases in a CSV template. AI-generated test cases offer two data options: generating tests based on topics and actions, or generating tests based on the knowledge available to the agent via an Agentforce Data Library.

Select Evaluations

Evaluations measure your AI agent's performance across key areas. Default evaluations are always tested, but you can select quality metrics to focus your tests on specific areas.

Create a Test Suite

Fast-track your testing with AI-generated testing scenarios or create and upload your own. Test your agents against topics and actions or data available via an Agentforce Data Library.

REQUIRED EDITIONS

	New Testing Center in Agentforce Builder (beta)
This article applies to:	

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Available in: Lightning Experience

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USER PERMISSIONS NEEDED

To create tests in the Testing Center:

Manage AI Agents AND the required permissions for your agent type

1. To begin tests from Agentforce Studio, select **Tests**. You'll see your existing test suites including the agent it tests. To create a test suite, select **New Suite**.
2. Enter a name and select the agent you want to test. Optionally, add a description. Click **Next**.

 **Important** The agent you select to test impacts the test conditions, type, and data available for testing. To generate test scenarios from your knowledge base, the agent must be linked to a data library containing that information. Similarly, to generate tests for topics or actions, the agent must be assigned those topics and actions.

Define Test Conditions

When you upload test cases from the CSV template, defining test conditions such as conversation history and context variables helps provide context. These variables help simulate more realistic user interactions, making your tests more reliable and reflective of actual agent behavior.

REQUIRED EDITIONS

	New Testing Center in Agentforce Builder (beta)
	Legacy Agentforce Testing Center in Setup
This article applies to:	
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Available in: Lightning Experience

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USER PERMISSIONS NEEDED

To create tests in the Testing Center:

Manage AI Agents AND the required permissions

USER PERMISSIONS NEEDED

for your agent type

- !** **Important** Conversation history and context variables appear only as columns in the downloadable CSV template and aren't factored into generated test cases.

1. To add a conversation history to your tests, select **Include conversation history**. A column is added for the conversation to your CSV template, where you can add the utterances that you want to test.
2. To test your agent against specific scenarios or related data, select **Include context variables** and then select the fields you want to include. Context variables map to fields on objects associated with the agent and add details to your test cases that help simulate realistic conversations. For example, for SDR agent tests, you can include variables like Lead Name to generate test utterances with contextual details like customer name and company name. A column is added with these variables to your CSV template.
3. Click **Next**.

Select Your Test Data

Evaluate your agent's performance by using AI-generated tests cases or uploading your own test cases in a CSV template. AI-generated test cases offer two data options: generating tests based on topics and actions, or generating tests based on the knowledge available to the agent via an Agentforce Data Library.

REQUIRED EDITIONS

	New Testing Center in Agentforce Builder (beta)
This article applies to:	
	Legacy Agentforce Testing Center in Setup
This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To create tests in the Testing Center:

Manage AI Agents AND the required permissions
[for your agent type](#)

How do I select my test data?

Each testing approach helps you simulate real-world interactions and catch issues early, but some are

more useful than others depending on your testing goals.

Topics and actions test cases are formatted as conversations, enabling evaluation at both the single-utterance and multi-turn conversation level. We recommend generating topics and actions tests to evaluate how your agent handles specific intents or workflows, especially after making updates or before launching an agent. This approach checks that the agent triggers the correct behaviors based on user utterances.

Knowledge-based test cases are formatted as question-and-answer style utterances taken from the knowledge information available to the agent. We recommend generating knowledge-based tests to verify that your agent delivers accurate, content-driven responses from connected knowledge sources, such as articles or PDFs. This approach is ideal for confirming that important information, like company policies or product specifications, is correctly retrieved and communicated.

If you need more control, download the provided CSV template, fill it with your custom test scenarios, and upload it. This approach is best for tailored testing or validating specific business logic.

[Generate Tests from Topics and Actions](#)

Evaluate how well your agent handles key topics and actions. Generate relevant, test-ready utterances by using your topic and action metadata as well as information from connected data libraries.

[Generate Tests from Knowledge Sources](#)

When your agent is connected to an Agentforce Data Library, you can generate test scenarios directly from the content linked to that library. You can base test cases on multiple data sources including articles and knowledge fields or uploaded files.

[Upload Test Cases](#)

To use your own scenarios, upload your CSV file.

Generate Tests from Topics and Actions

Evaluate how well your agent handles key topics and actions. Generate relevant, test-ready utterances by using your topic and action metadata as well as information from connected data libraries.

REQUIRED EDITIONS

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This article applies to:	
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This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create tests in the Testing Center:

Manage AI Agents AND the required permissions
for your agent type

To get started select the topics you want to test, define the test focus with a brief description, and have the system generate test cases. Test cases are formatted as conversations, enabling evaluation at both the single-utterance and multi-turn conversation level.

1. To create test cases from topics and actions, select **Generate test cases based on topics and actions**.

 **Note** Test cases are drafted in the Agentforce Agent's default language. For supported languages, see [Considerations for Testing Center](#).

2. Specify how many test cases you want to generate. You can generate up to 200 test cases at a time.
3. Enter a description to help guide the AI model about the purpose and scope of your testing.

How does the test description influence my tests?

The test description is included in the prompt and guides how your test cases are generated by defining the test focus or theme. Keywords and phrases in the description help narrow the information that tests are built around, which is especially useful when your agent is linked to multiple sources like articles or PDFs.

While you can't customize the format or complexity of tests in the description, you can help define the test focus by using relevant terms and phrases. Although perfect grammar isn't required, using complete sentences to write out the description helps both AI and human reviewers understand your intent and improves the output's relevance.

4. Select the topics that you want to test. Click **Next**.

How do I select which topics and actions to test?

Agentforce Testing Center identifies the topics and actions accessible to the agent that you're testing and uses this information to create targeted test cases. Test utterances are then drafted based on the agent's topic and action instructions, aiming to trigger the agents to select them. When your agent receives and processes an utterance, we confirm that the agent correctly selected the intended topic and action.

To assess your agent's overall effectiveness, generate test cases across all available topics. This comprehensive approach provides a broad understanding of your agent's performance, so you can pinpoint areas of weakness and prioritize further, more targeted testing. By identifying and addressing these pain points early, you can significantly improve your agent's accuracy before deployment.

Alternatively, if you've modified a specific topic or action, select those topics to validate the changes and ensure correct behavior. For example, if you've updated the "Refund Request" topic, you can isolate tests to only that topic to ensure the changes function as intended, saving time and increasing confidence in your agent's performance.

You can also select a cluster of topics related to a specific business area. For instance, you could select a group of topics related to Order Management, like Order Status, Cancel Order, Modify Order, to comprehensively test how your agent handles a customer's end-to-end order-related queries. Clustering related topics can ensure a seamless and accurate experience across all touchpoints.



Note Generative AI can generate test cases for Account, Lead, Opportunity, and Contact objects.

With specific instructions in the description, it can also create test cases for custom objects and the Answer Questions with Knowledge action. For example, for custom objects, use a description similar to this: "Generate test cases for [custom object name]. Sample utterances are: [sample utterance related to custom object], [sample utterance related to custom object]." To have AI create test cases for the Answer Questions with Knowledge action, use a description similar to this: "Generate test cases for the Answer Questions with Knowledge action. Use the following knowledge articles for generating tests: [title of an article], [title of an article]."

Generate Tests from Knowledge Sources

When your agent is connected to an Agentforce Data Library, you can generate test scenarios directly from the content linked to that library. You can base test cases on multiple data sources including articles and knowledge fields or uploaded files.

REQUIRED EDITIONS

	New Testing Center in Agentforce Builder (beta)
This article applies to:	
	Legacy Agentforce Testing Center in Setup
This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To create tests in the Testing Center:

Manage AI Agents AND the required permissions
for your agent type

To get started define the test focus with a brief description, and have the system generate test cases. The testing center generates question-and-answer style test cases based on the knowledge content available to the agent.

1. To create test cases from your knowledge, select **Generate test cases based on knowledge available to this agent**.



Note Test cases are drafted in the Agentforce Agent's default language. For supported languages, see [Considerations for Testing Center](#).

2. Specify how many test cases you want to generate. You can generate up to 200 test cases at a time.
3. Enter a description to help guide the AI model about the purpose and scope of your testing. Click **Next**.

How does the test description influence my tests?

The test description is included in the prompt and guides how your test cases are generated by defining the test focus or theme. Keywords and phrases in the description help narrow the information that tests are built around, which is especially useful when your agent is linked to multiple sources like articles or PDFs.

While you can't customize the format or complexity of tests in the description, you can help define the test focus by using relevant terms and phrases. Although perfect grammar isn't required, using complete sentences to write out the description helps both AI and human reviewers understand your intent and improves the output's relevance.



Note Generative AI can generate test cases for Account, Lead, Opportunity, and Contact objects.

With specific instructions in the description, it can also create test cases for custom objects and the Answer Questions with Knowledge action. For example, for custom objects, use a description similar to this: "Generate test cases for [custom object name]. Sample utterances are: [sample utterance related to custom object], [sample utterance related to custom object]." To have AI create test cases for the Answer Questions with Knowledge action, use a description similar to this: "Generate test cases for the Answer Questions with Knowledge action. Use the following knowledge articles for generating tests: [title of an article], [title of an article]."

Upload Test Cases

To use your own scenarios, upload your CSV file.

REQUIRED EDITIONS

	New Testing Center in Agentforce Builder (beta)
This article applies to:	
	Legacy Agentforce Testing Center in Setup
This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To create and run tests in Testing Center: Manage AI Agents AND the required permissions for your agent type

To upload files to Testing Center: File Upload permissions. See [Configure File Upload and Download Security Settings](#)

1. To upload your test scenarios, select **Upload test cases**.
2. Under Attachment click **Upload Files**. Select your testing file and, when the upload is complete, click **Done**. For uploads, you can run up to 1000 tests per file.
3. Click **Next**.



Tip You can fine-tune AI-generated test cases by downloading the AI-generated test case CSV file, making your changes, and then reuploading the CSV file to the testing center.

Select Evaluations

Evaluations measure your AI agent's performance across key areas. Default evaluations are always tested, but you can select quality metrics to focus your tests on specific areas.

REQUIRED EDITIONS

	New Testing Center in Agentforce Builder (beta)
This article applies to:	
	Legacy Agentforce Testing Center in Setup
This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create tests in the Testing Center: Manage AI Agents AND the required permissions for your agent type

Default evaluations include response accuracy, topic assertion, and action assertion. To match your testing goals, you can add quality-focused evaluations like completeness, coherence, conciseness, latency, and instruction adherence. Selecting the right mix of evaluations gives you the best insights to strategically refine and improve your agent.

When Agentforce finishes generating the tests, they appear in Testing Center. From Testing Center, you can edit the tests inline or download them as a CSV.

Default Evaluations

Default evaluations measure your AI agent's performance across response accuracy, topic assertion, and action assertion.

Run Quality Evaluations

Response quality evaluations measure your agent's accuracy and relevance.

Create Custom Evaluations

Custom evaluations help you test your AI against specific criteria like accuracy, tone, and brand voice. By using an LLM-as-judge, you can automatically score and review outputs to make sure that your agents' responses consistently meet your specific goals and quality standards.

Default Evaluations

Default evaluations measure your AI agent's performance across response accuracy, topic assertion, and action assertion.

REQUIRED EDITIONS

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This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To create tests in the Testing Center:

[Manage AI Agents AND the required permissions for your agent type](#)

Default evaluations are always tested.

Evaluation	Definition
Response Evaluation	We send the test utterance to the agent and record the response. An LLM judge determines the expected response, compares it to the agent's response, and assigns a score.
Topic Assertion	AI-generated test utterances are designed to trigger your agent to select their assigned topics. So, the topic assertion evaluation determines if your agent selected the correct topics based on the utterance.

Action Assertion	Similar to the topic assertion, AI-generated test utterances are designed to trigger your agent to select specific actions. The action assertion checks that the agent selects the right actions and includes all expected actions based on the utterance.
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When the status is Ready to Run, to run the tests click **Run Tests**.

Run Quality Evaluations

Response quality evaluations measure your agent's accuracy and relevance.

REQUIRED EDITIONS

✓	New Testing Center in Agentforce Builder (beta)
This article applies to:	
✗	Legacy Agentforce Testing Center in Setup
This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To create tests in the Testing Center:	Manage AI Agents AND the required permissions for your agent type
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Response quality evaluations measure the Agentforce Testing Center's three key quality criteria: accuracy (correct information), relevance (addressing intent and context), and voice and tone (assessing style and brand alignment).

1. Select the evaluations that you want to run on your test cases.

Evaluation	Definition
Completeness	Checks whether the agent sufficiently covered the relevant content, including all important pieces of information expected from the utterance.
Coherence	Assesses if the response was transformed into grammatically correct, conversational language. For example, if information is taken from Salesforce objects

	and delivered as raw data like JSON structures.
Conciseness	Evaluates if the response is short but accurate.
Latency	Test execution time, measured in milliseconds.
Instruction Adherence	Checks how well the agent interprets and fully follows the topic instructions, addressing key points and providing required information. Learn more about Instruction Adherence in Help.

- When the status is Ready to Run, to run the tests click **Run Tests**.

Create Custom Evaluations

Custom evaluations help you test your AI against specific criteria like accuracy, tone, and brand voice. By using an LLM-as-judge, you can automatically score and review outputs to make sure that your agents' responses consistently meet your specific goals and quality standards.

REQUIRED EDITIONS

✓	New Testing Center in Agentforce Builder (beta)
This article applies to:	
✗	Legacy Agentforce Testing Center in Setup
This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create tests in the Testing Center:

Manage AI Agents AND the required permissions for your agent type

Every agent has a purpose or goal, so evaluating an agent's performance requires identifying metrics tailored to that purpose. Along with default evaluations, custom evaluations let you define specific criteria to assess your agent's effectiveness beyond simple pass or fail checks. With custom evaluations you can check that your AI agents consistently reflect your brand voice, meet quality expectations, and deliver the intended sentiment.

- To create a custom evaluation, and click **Add Custom** and, select **LLM Judge**.

What is an LLM judge?

An LLM judge (or LLM-as-judge) is when one large language model (LLM) evaluates the outputs of another. A judge LLM receives a prompt that defines the task and outlines the evaluation criteria like factual accuracy, relevance, coherence, and faithfulness to source. With these resources and guidelines, the LLM judge determines the expected response and compares it to the agent response. Based on this comparison, the judge generates scores, rankings, or written feedback. The LLM as judge model serves as a scalable, automated, and objective evaluation tool for tasks like scoring summaries or ranking responses. We've carefully designed our LLM-as-judge prompts to give you the most accurate and useful test results.

2. When you create a prompt for a custom evaluation, you can tailor several key elements.
 - Determine which AI model serves as the judge
 - Add in Salesforce resources
 - Save multiple template versions
 - Set the threshold score for your passing criteria
3. Save your evaluation.

After you save your custom evaluation, it's automatically selected for your test suite evaluations. When the status is Ready to Run, to run the tests click **Run Tests**.

Set Up and Run Tests in Setup (Legacy)

Efficiently validate your agent's performance at scale, whether you want to fast-track testing with AI-generated scenarios or manually craft and upload your own. You can generate realistic test cases for specific topics and actions, or data linked through the Agentforce Data Library.

REQUIRED EDITIONS

	Legacy Agentforce Testing Center in Setup
This article applies to:	
	New Testing Center in Agentforce Builder (beta)
This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

Start by selecting the agent you want to test and configuring key conditions like conversation history and context variables to match your real-world use case. Then, choose your test data: generate scenarios to validate the agent's selection of topics and actions, generate question-and-answer style test cases based on the knowledge content available to the agent, or upload your own test cases in a CSV file for full control. Then, select the evaluations that best measure your agent's performance ranging from basic response accuracy to deeper quality metrics like coherence, completeness, and instruction adherence. You can run tests immediately or download the cases for review and refinement before execution.

1. Create a Test

Fast-track your testing with AI generated testing scenarios or create and upload your own. Test your agents against topics and actions or data available in Agentforce Data Library.

2. Define Test Conditions

When you upload test cases from the CSV template, defining test conditions such as conversation history and context variables helps provide additional context. These variables help simulate more realistic user interactions, making your tests more reliable and reflective of actual agent behavior.

3. Add Test Data

Add test cases to evaluate your agent's performance by either generating them with AI or uploading your own scenarios. AI-generated test cases offer two data options: generating based on topics and actions, or generating from knowledge available to the agent via the Agentforce Data Library.

4. Choose Evaluations

Evaluations measure your AI agent's performance across key areas. Default evaluations include response accuracy, topic assertion, and action assertion. To better match your testing goals, you can add quality-focused evaluations like completeness, coherence, conciseness, latency, and instruction adherence. Selecting the right mix of evaluations gives you the insights you need to strategically refine and improve your agent.

See Also

[Trailhead: Agentforce Testing Tools and Strategies](#)

[Trailhead: Agentforce Testing Center](#)

Create a Test

Fast-track your testing with AI generated testing scenarios or create and upload your own. Test your agents against topics and actions or data available in Agentforce Data Library.

REQUIRED EDITIONS

	Legacy Agentforce Testing Center in Setup
This article applies to:	
	New Testing Center in Agentforce Builder (beta)

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To create tests in the Testing Center:

Manage AI Agents AND the required permissions for your agent type

- From Setup, in the Quick Find box, search for and select **Testing Center**. Select **New Test**. Or to begin tests from Agentforce Builder, select **Batch Test**. When you initiate tests from Agentforce Builder, you can include the Agentforce Builder conversation history in AI-generated test scenarios.
- Enter a name and select the agent you want to test. Optionally, add a description. Click **Next**.



Note The agent you select can impact the test conditions and data available for testing. To generate test scenarios from your knowledge base, the agent needs to be linked to the data library containing the information you want to include in the tests.

See Also

[Explore Agentforce Builder](#)

[Trailhead: Introduction to Agentforce Builder](#)

Define Test Conditions

When you upload test cases from the CSV template, defining test conditions such as conversation history and context variables helps provide additional context. These variables help simulate more realistic user interactions, making your tests more reliable and reflective of actual agent behavior.

REQUIRED EDITIONS

	Legacy Agentforce Testing Center in Setup
This article applies to:	
	New Testing Center in Agentforce Builder (beta)
This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To create tests in the Testing Center:

[Manage AI Agents AND the required permissions for your agent type](#)

Important Conversation history and context variables appear only as columns in the downloadable CSV template and are not used when generating test cases.

- If you initiate batch tests from Agentforce Builder you can include that conversation history in your test cases. This adds a column for the conversation to your CSV template and testing grid. You'll need to add the conversation turns manually. To add the builder conversation history to your CSV template, select **Include conversation history**. You may get different results than you get using the same utterances in an Agentforce Builder session.

2. To add context variables to your test template, select **Include context variables**. Context variables map to fields on the objects associated with an agent and add information to your test cases that helps simulate realistic conversations. This adds a column and populates the variables to your CSV template. Select the context fields you want to include and click **Next**. See [Understand Context and System Variables](#).

See Also

[Agent Variables](#)

Add Test Data

Add test cases to evaluate your agent's performance by either generating them with AI or uploading your own scenarios. AI-generated test cases offer two data options: generating based on topics and actions, or generating from knowledge available to the agent via the Agentforce Data Library.

REQUIRED EDITIONS

	Legacy Agentforce Testing Center in Setup
This article applies to:	
	New Testing Center in Agentforce Builder (beta)
This article doesn't apply to:	

Available in: Lightning Experience

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USER PERMISSIONS NEEDED

To create tests in the Testing Center:

Manage AI Agents AND the required permissions for your agent type

Use the topics and actions method when you want to test how well your agent handles specific intents or workflows, especially after updates or before launch. This approach helps confirm the agent triggers the correct behaviors based on user utterances. Alternatively, choose the knowledge-based method to validate your agent's ability to provide accurate, content-driven responses using connected knowledge sources like articles or PDFs. For full control, you can also upload a CSV file with your own test scenarios which is ideal for custom testing needs or validating specific business logic. Each approach allows you to simulate real-world interactions and identify improvement areas before deploying your agent.

[Generate Tests from Topics and Actions](#)

Evaluate how well your agent handles key topics and actions before launch. Generate relevant, test-ready utterances using your topic and action metadata as well as information from connected data libraries. Simply choose the topics you want to test, define the test focus with a brief description, and

let the system generate up to 100 test cases.

Generate Tests from Knowledge Sources

When your agent is connected to an Agentforce Data Library, you can generate test scenarios directly from the content linked to that library including articles and knowledge fields or uploaded files.

Testing center generates up to 100 question-and-answer style test cases based on the knowledge content available to the agent.

Upload Test Cases

To use your own scenarios, upload your CSV file.

Generate Tests from Topics and Actions

Evaluate how well your agent handles key topics and actions before launch. Generate relevant, test-ready utterances using your topic and action metadata as well as information from connected data libraries. Simply choose the topics you want to test, define the test focus with a brief description, and let the system generate up to 100 test cases.

REQUIRED EDITIONS

	Legacy Agentforce Testing Center in Setup
	New Testing Center in Agentforce Builder (beta)
	This article doesn't apply to:

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To create tests in the Testing Center:

[Manage AI Agents AND the required permissions for your agent type](#)

1. To create test cases from topics and actions, select **Generate test cases based on topics and actions**.

Note Test cases are drafted in the Agentforce Agent's default language. For supported languages, see [Considerations for Testing Center](#).

2. Specify how many test cases you want to generate. You can generate up to 100 test cases at a time.
3. Enter a description to help guide the AI model about the purpose and scope of your testing.

How does the test description influence my tests?

The test description is included in the prompt and helps guide how your test cases are generated by defining the focus or theme of the test. Keywords and phrases in the description help narrow the

domain of information the tests are built around, which is especially useful when your agent uses multiple sources like articles or PDFs.

While you can't customize the format or complexity of the tests in the description, the more clearly you define the focus using relevant terms and phrases, the more targeted your test cases will be. Although perfect grammar isn't required, writing it out in complete sentences can help both the AI and human reviewers better understand your intent and improve the relevance of the output.

4. Select the topics you want to test. Click **Next**.

Which topics and actions should I choose?

Agentforce Testing Center identifies the topics and actions accessible to the agent you're testing and uses this information to create targeted test cases. Test utterances are then drafted based on the agent's topic and action instructions, aiming to trigger the agents to select them. When these utterances are sent to your agent, we confirm that the agent correctly selected the intended topic and action.

To assess your agent's overall effectiveness, generate test cases across all available topics. This comprehensive approach provides a broad understanding of your agent's performance, so you can pinpoint areas of weakness and prioritize further, more targeted testing. By identifying and addressing these pain points early, you can significantly improve your agent's accuracy before deployment.

Alternatively, if you've modified a specific topic or action, select those topics to validate the changes and ensure correct behavior. For example, if you've updated the "Refund Request" topic, you can isolate tests to only that topic to ensure the changes function as intended, saving time and increasing confidence in your agent's performance.

You can also choose to select a cluster of topics related to a specific business area. For instance, you might select a group of topics related to Order Management, like Order Status, Cancel Order, Modify Order, to comprehensively test how your agent handles a customer's end-to-end order-related queries, ensuring a seamless and accurate experience across all touchpoints.

See Also

[Configure Your Agent](#)

Generate Tests from Knowledge Sources

When your agent is connected to an Agentforce Data Library, you can generate test scenarios directly from the content linked to that library including articles and knowledge fields or uploaded files. Testing center generates up to 100 question-and-answer style test cases based on the knowledge content available to the agent.

REQUIRED EDITIONS

	Legacy Agentforce Testing Center in Setup
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This article applies to:	
	New Testing Center in Agentforce Builder (beta)
This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create tests in the Testing Center:

Manage AI Agents AND the required permissions for your agent type

1. To create test cases from your knowledge, select **Generate test cases based on knowledge available to this agent.**

 **Note** Test cases are drafted in the Agentforce Agent's default language. For supported languages, see [Considerations for Testing Center](#).

2. Specify how many test cases you want to generate. You can generate up to 100 test cases at a time.
3. Enter a description to help guide the AI model about the purpose and scope of your testing. Click **Next.**

How does the test description influence my tests?

The test description is included in the prompt and helps guide how your test cases are generated by defining the focus or theme of the test. Keywords and phrases in the description help narrow the domain of information the tests are built around, which is especially useful when your agent uses multiple sources like articles or PDFs.

While you can't customize the format or complexity of the tests in the description, the more clearly you define the focus using relevant terms and phrases, the more targeted your test cases will be. Although perfect grammar isn't required, writing it out in complete sentences can help both the AI and human reviewers better understand your intent and improve the relevance of the output.

See Also

[Agentforce Data Library](#)

Upload Test Cases

To use your own scenarios, upload your CSV file.

REQUIRED EDITIONS

	Legacy Agentforce Testing Center in Setup
This article applies to:	
	New Testing Center in Agentforce Builder (beta)
This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create and run tests in Testing Center:	Manage AI Agents AND the required permissions for your agent type
To upload files to Testing Center:	File Upload permissions. See Configure File Upload and Download Security Settings

1. To upload your test scenarios, select **Upload test cases**.
2. Under Attachment click **Upload Files**. Select your testing file and, when the upload is complete, click **Done**. For uploads, you can run up to 1000 tests per file.
3. Click **Next**.



Tip You can fine-tune AI-generated test cases by downloading the AI-generated test case CSV file, making your changes, and then reuploading the CSV file to the testing center.

Choose Evaluations

Evaluations measure your AI agent's performance across key areas. Default evaluations include response accuracy, topic assertion, and action assertion. To better match your testing goals, you can add quality-focused evaluations like completeness, coherence, conciseness, latency, and instruction adherence. Selecting the right mix of evaluations gives you the insights you need to strategically refine and improve your agent.

REQUIRED EDITIONS

	Legacy Agentforce Testing Center in Setup
This article applies to:	
	New Testing Center in Agentforce Builder (beta)
This article doesn't apply to:	

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To create tests in the Testing Center:

Manage AI Agents AND the required permissions for your agent type

1. Select the evaluations you want the test to run. Default evaluations are always tested, but you can select Response Quality Metrics to focus your tests on specific areas. Response quality evaluations measure the Agentforce Testing Center's three key quality criteria: accuracy (correct information), relevance (addressing intent and context), and voice and tone (assessing style and brand alignment).

Evaluation	Definition
Default Evaluations	
Response Evaluation	We send the test utterance to the agent and record the response. An LLM judge determines the expected response, compares it to the agent's response, and assigns a score.
Topic Assertion	AI-generated test utterances are designed to trigger your agent to select their assigned topics. So, the topic assertion evaluation determines if your agent selected the correct topics based on the utterance.
Action Assertion	Similar to the topic assertion, AI-generated test-utterances are designed to trigger your agent to select specific actions. The action assertion checks that the agent selects the right actions and includes all of the expected actions based on the utterance.
Response Quality Evaluations	
Completeness	Checks whether the agent sufficiently covered the desired content, including all important pieces of information that are expected from the utterance.
Coherence	Assesses if the response was transformed into grammatically correct, conversational language. For example, if information has been taken from Salesforce objects and delivered as raw data like JSON structures.
Conciseness	Evaluates if the response is short but accurate.
Latency	Test execution time, measured in milliseconds.

Instruction Adherence	Checks how well the agent interprets and fully follows the topic instructions, addressing key points and providing required information. Learn more about Instruction Adherence in Help.
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- Check over your test selections and click **Save & Run**. Generating tests consumes credits, so make sure you are happy with your configuration before running.

When Agentforce finishes generating the tests, they'll appear in the Testing Center. When the status is Ready to Run, to run the tests directly click **Run Tests**, or download them as a CSV to make edits. After editing, upload the CSV back into the Testing Center to run tests on your updated cases.

-  **Note** Generative AI can generate test cases for Account, Lead, Opportunity, and Contact objects. With specific instructions in the description, it can also create test cases for custom objects and the Answer Questions with Knowledge action. For example, for custom objects, use a description similar to this: "Generate test cases for [custom object name]. Sample utterances are: [sample utterance related to custom object], [sample utterance related to custom object]." To have AI create test cases for the Answer Questions with Knowledge action, use a description similar to this: "Generate test cases for the Answer Questions with Knowledge action. Use the following knowledge articles for generating tests: [title of an article], [title of an article]."

See Also

[Instruction Adherence](#)

Use the Test Results

Once your tests finish running, you'll see overall metrics for the test suite along with evaluation scores for each test. Use these results to identify failed or low-scoring utterances, then manually retest them in Agentforce Builder. Refine the instructions within your topics and actions, and iterate until you're satisfied with the responses. Pay close attention to recurring failures as these results can help uncover underlying issues such as unclear guidance, missing knowledge, or configuration issues. To interpret your results, see how each evaluation helps to measure agent performance.

To interpret your results, see how each evaluation helps to measure agent performance.

Default evaluations are given a score of 1, pass, or 0, fail.

Evaluation	Testing Significance	Recommendation
Response Evaluation	Scores of 3 to 5 indicates that the agent generally succeeds in achieving its goal. A score of 5 reflects a precise, complete, and brand-aligned response with no irrelevant content.	Check your agent configuration for issues related to topic selection, instructions, or actions. Consider whether there are knowledge gaps, like outdated articles, or other issues preventing the agent from

Evaluation	Testing Significance	Recommendation
	<p>Scores of 3 to 4 show decreasing levels of clarity and completeness. There may be minor omissions or partial understanding which introduces some ambiguity while the core intent is still addressed.</p> <p>Scores of 1 to 2 suggest the agent struggled to meet the goal. The response may be unclear, missing key elements, or include irrelevant information. It might also ask the user for information that should have been retrieved from the CRM.</p> <p>A score of 0 represents a complete failure to resolve the user's query. The response is generic and doesn't address the user's intent.</p>	responding appropriately.
Topic Assertion	<p>A score of 1 indicates that the agent correctly identified the appropriate topic to address an utterance.</p> <p>A score of 0 indicates that the agent selected an unexpected topic to address an utterance.</p>	Manually retest any failed utterance in Agentforce Builder and review the agent's reasoning in the plan canvas. Refine the instructions for both the expected action and the topic itself to clearly guide the agent toward the correct choice and restrict the use of the incorrect action.
Action Assertion	<p>A score of 1 indicates that the agent correctly identified all of the appropriate actions within a topic to address an utterance.</p> <p>A score of 0 indicates that the agent either chose the wrong actions or failed to select all necessary actions within a topic to address an utterance.</p>	Manually retest any failed utterance in Agentforce Builder and review the agent's reasoning in the plan canvas. Refine the instructions for both the expected action and the topic itself to clearly guide the agent toward the correct choice and restrict the use of the incorrect action.

Response quality evaluations are primarily scored between 0 and 5, with 3 or higher signifying a pass; however, Instruction Adherence is uniquely scored as High, Low, or Uncertain. The reasoning for each

score is provided by the LLM judge via an infobubble.

What is an LLM-as-judge?

LLM as Judge is when one large language model (LLM) evaluates the outputs of another LLM, serving as a scalable, automated, and objective evaluation tool for tasks like scoring summaries or ranking responses. A "judge" LLM receives a prompt that includes the task and evaluation criteria like, factual accuracy, relevance, coherence, and faithfulness to source. With these resources and guidelines, the LLM judge determines the expected response and compares it to the agent response then generates scores, rankings, or textual feedback. We've carefully designed our LLM-as-judge prompts to give you the most accurate and useful test results.

Evaluation	Testing Significance
Completeness	<p>A score of 5 indicates a fully complete and accurate answer with no important omissions. Scores of 4 and 3 reflect decreasing levels of completeness, with minor to moderate gaps that may slightly affect understanding.</p> <p>Scores of 1 or 2 indicate that the generated answer is significantly incomplete, missing several or most important pieces of information, which causes confusion or leads to a partially misleading result.</p> <p>A score of 0 represents a complete failure of the evaluation, signifying the answer missed all important pieces of information and is therefore highly confusing or misleading.</p>
Coherence	<p>Scores from 3 to 5 indicate that the agent can correctly transform underlying information into conversational language with the appropriate sentence and grammatical structures, ensuring that the dialogue flows smoothly and is easily understood by the user.</p> <p>Scores from 0 to 2 indicate that information has been taken from Salesforce objects and delivered as raw data like JSON structures or direct field content.</p>
Conciseness	<p>Scores from 3 to 5 indicate that the agent's response is short but accurate, successfully capturing the essence of the desired content.</p> <p>Scores from 0 to 2 mean the generated answer lacks conciseness, perhaps because the response is lengthy, repetitive, includes unimportant points, or contains irrelevant</p>

Evaluation	Testing Significance
	content.
Latency	A high or unusual latency in a test utterance suggests a problem with either the utterance itself or some underlying infrastructure. If agent adjustments don't resolve the issue, contact Salesforce support to check for infrastructure issues.
Instruction Adherence	<p>High: The agent interprets and fully follows the topic instructions, addressing key points and providing any required information.</p> <p>Low: The agent doesn't interpret or follow the topic instructions accurately. It fails to follow at least one instruction, leading to an incorrect response. This flags a need to refine instructions and set clearer constraints.</p> <p>Uncertain: Instruction adherence can't be conclusively determined due to an ambiguous response or action, incomplete response, or conflicting interpretations of the topic instructions.</p>

While default evaluations are scored by comparing expected and actual results, quality evaluations are assessed by the judge-LLM based on fixed criteria. If a response receives a low score, review it carefully to see whether it truly falls short of your expectations. For example, the judge-LLM may assign a low conciseness score, but you might feel that additional context better serves your customers or aligns with your brand voice. Otherwise, you can add extra instructions or guardrails to better tailor the agent to your goals. Always consider your specific goals and use case when interpreting scores. Quality evaluations provide guidance, but they are not absolute measures of your agent's success or failure.

See Also

[Monitor Your Agent](#)

[Trailhead: Agentforce Testing Center](#)

[Trailhead: Introduction to Agentforce Builder](#)

Considerations for Testing Center

To use Testing Center, consider supported functionality, usage, limitations and allowances, limits, and other issues.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

Testing Center Language and Locale Support

Testing Center supports the languages and locales supported on the Salesforce generative AI platform, as described in [Einstein Generative AI Supported Languages and Locales](#).

Testing Center Region Support

Testing Center supports the geo-aware models supported on the Salesforce generative AI platform, as described in [Geo-Aware LLM Request Routing on the Einstein Generative AI Platform](#).

Testing Center and Einstein Requests Usage

Einstein Requests is a usage metric 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](#).

Troubleshooting Agents

Solve common agent issues.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

My agent is choosing the wrong topic for the user question or request.

To select a topic, an agent looks at the last six turns of the conversation history, including the user's most recent message. The agent compares these with names and classification descriptions of the topics assigned to the agent and selects the best match.

When you expect user utterances to trigger a certain topic and your agent misclassifies them, check the name and classification description for the topic. Effective topic names describe what the topic does in natural language. Effective classification descriptions clearly describe what the topic does and identify the types of user requests that must be classified into the topic. Consider adding key terms, examples, or example user requests.

Less Effective	More effective
<p>Topic Name: v1_Orders Classification</p> <p>Description: Handle order-related inquiries.</p> <p>Explanation: Both the topic name and classification description are too general to provide the agent with enough context to know how and when to use this topic. The agent also doesn't know what "v1" means in the context of the topic name.</p>	<p>Topic Name: Order Management</p> <p>Description: Answer questions related to orders, shipping status, delivery times, or tracking. Help with finding order details, changing or canceling orders, and addressing order-related concerns.</p> <p>Explanation: Both the topic name and classification description are more effective because they specifically describe the questions and requests that the topic can handle.</p>

Make sure that you have no more than 10 actions in your topic and no more than 10 topics assigned to your agent. If there are too many actions and topics, the agent can choose an incorrect one.

My agent is using the wrong action for the user question or request.

Agents use action instructions and topic instructions to select an action, so plan to troubleshoot on both levels.

- Verify that your agent is choosing the right topic and selecting the wrong action within the topic in Agentforce Builder plan canvas, and not choosing the wrong topic altogether.
- Test and iterate on your agent action names and instructions in Agentforce Builder, including input and output instructions. Effective names and instructions for agent actions, inputs, and outputs describe what the action does in natural language. For example, the action name “lookup_products” is more effective than “action_agent_searchForRecords_products_only.” [Learn more about best practices for writing action instructions.](#)
- Add or modify topic instructions to provide direct guidance about when to launch a specific action. [Learn more about best practices for writing topic instructions.](#)
- Verify that the action instructions and topic instructions don’t conflict with each other. Contradicting instructions can cause errors and degrade agent performance.
- Make sure that you have no more than 10 actions in your topic and no more than 10 topics assigned to your agent. If there are too many actions and topics, the agent can choose an incorrect one.

My agent output is incorrect or not what I expected.

If your agent action uses sources (for example, the Answer Questions with Knowledge action uses your knowledge base), verify the output of your action against the content of your sources. Before making any changes to an agent action or topic, consider altering the source content or limiting the sources that your action searches. This is particularly effective if the issue affects only one or a few of the sources in your database.

Test and iterate on the instructions for the related topic, action, and associated inputs and outputs. Make

sure to verify the behavior of the reference action itself. This involves testing the Apex class, flow, or prompt template your action is built on for any issues.

To improve agent outputs at the action level, you can add an instruction to ensure inputs to your actions reflect your desired output. For example, if you want your agent to include a model number in a search query, you can add a topic instruction to ask the user for a model number. Then modify the action instructions, including the input instructions, to require the model number in the query. You can also use instructions to provide context for the agent, such as defining business-specific acronyms or explaining processes.

Less EFFECTIVE	more effective
<p>Instruction: Always ask for the model number</p> <p>Instruction: Add the model number to search queries</p> <p>Explanation: The first instruction isn't detailed enough, which can result in the agent asking for a model number when a model number isn't needed. Since they're divided into two instructions, the agent doesn't necessarily connect the two instructions. This means the agent may not understand how or when to pass a model number into the search.</p>	<p>Instruction: When a user asks a product-related question, always ask for the specific model number if not already provided. Include this model number in any knowledge search queries.</p> <p>Explanation: This instruction explains when the agent should ask for a model number. It also explains how to use the model number. It's more likely to be effective because the instruction explains how and when to use the model number in detail and in a single instruction.</p>

My agent isn't selecting the right inputs to pass into the action.

Add more details to the action input instructions. Input instructions help an agent understand the context of a conversation and what data to use. Effective input instructions can include the data type of the required information, specific fields or values, how the information must be retrieved, and any special rules about how you expect the action to be used. [Learn more about best practices for writing action input instructions.](#)

My agent isn't consistently following the rules I provide.

Agents are powered by a large language model (LLM). LLMs are nondeterministic, so there's always some variation in responses. However, following best practices for topic and action fields can help agents stay on track.

- Be as specific, clear, and direct as possible. Provide contextual details about your use case so your agent is more likely to return a consistent response. More detail is often better than less. For example, it can be helpful to define business-specific acronyms or explain processes.
- Provide examples that help your agent find patterns for how to respond to common, repeated scenarios.

- Carefully iterate on and test your topics and actions. Defining effective instructions and other fields is an iterative process.
- Verify that the action instructions and topic instructions don't conflict with each other. Contradicting instructions can cause errors and degrade agent performance.
- Don't include sensitive or deterministic business rules (for example, "Don't refund an order unless it was within 30 business days.") in topic or action instructions. For consistent performance, build these requirements into the functionality of the reference action (for example, the Apex class or flow that an agent action references).

Agents don't follow topic instructions in the order they appear. If you want your agent to follow steps in a specific order, put the steps in one instruction field and use clear order words, such as "First, do X... Second, do Y... Finally, do Z..." Limit the instructions to a few simple steps. If your sequential instruction is too complex, the agent can follow the steps inconsistently or out of sequence.

If your agent tries to do something that it shouldn't (for example, issuing refunds when it should only handle returns), use the topic scope instead of topic instructions. After an agent has selected a topic based on user input, the scope gives an agent more information about what it's able to do with a topic. Describe what the agent can do with the topic as well as what it shouldn't do (for example, "You aren't able to make new reservations.").

If you've followed all of these best practices and your agent is still behaving unreliably, you may have too many instructions. Reducing the number and complexity of instructions can help your agent reach consistent baseline functionality. Start by paring down your instructions to the fewest instructions necessary for your agent to handle your basic use cases. Then add instructions one by one to capture edge cases.

My agent is having a hard time understanding user messages.

Because agents accept free-text input, sometimes user input can be vague or otherwise difficult for the agent to classify. You can add instructions to one or more of your topics to direct your agent to clarify what the user is requesting or asking about. For example, "If the user's message is unclear, always ask clarifying questions to get more information from the user."

My agent isn't consistently updating the page context when updating fields or switching between records.

If a supported action is triggered by a user's request, Agentforce (Default) is aware of which page the user is on. Sometimes the agent maintains the previous page's context during a conversation.

If your use case requires an agent to always update the page context, you can add instructions to a topic. For example, "Always generate a new summary by calling SummarizeRecord when asked for a record summary. Do not respond with any summary from the chat history."

You can also use conversation variables. For example, assign the currentRecordId variable to the recordId action input on the Summarize Record action. For more information about variables, see [Agent](#)

Variables

To troubleshoot, users can also adjust their requests to be more specific. For example, they can ask the agent, “summarize this record with the latest information.”

See Also

[Troubleshooting Knowledge Retrieval for Agents](#)

Deploy Your Agent to Channels

Connect your agent to multiple channels. Meet your customers and employees where they spend the most time.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

Review key concepts for deploying agents to channels.

Connections and Adaptive Response Formats

A connection includes adaptive response formats that help your agent structure responses and deliver multimedia content, such as images, buttons, links, and videos. It also includes settings and Omni-Channel flows that help route conversations to and from an agent.

Connections help you scale agent development and reduce repetitive setup by letting you build an agent once and easily add it to multiple channels in Agentforce Builder. They also help the agent make customer and employee experiences more dynamic, channel-specific, and consistent. One way to think of connections is to consider how people act in different settings. People adapt their communication methods to align with each setting’s unique rules, etiquettes, and constraints. For example, you use text and a casual tone in Slack, but use audio and a formal tone on phone calls. Each agent template supports specific connections, and you can connect the agent to the channels associated with those connections.

When a user interacts with your agent on a connected channel, your agent identifies the connection associated with the experience. The agent adapts its reasoning based on the behind-the-scenes instructions associated with the connection, classifies the user’s utterance into the most relevant topic, and launches one or more actions. Before sending a response, the agent determines which adaptive response format to structure it with, if any. To select an adaptive response format, the agent considers the formats available, the action’s output, and the accompanying agent message. It takes the adaptive response formats available with the connection and the action output with its accompanying message into account.

For example, let's say that a customer sends a message to an Agentforce Service agent (ASA) on an enhanced Facebook Messenger channel. The ASA has the Messaging connection, which is associated with all enhanced Messaging channels and includes adaptive response formats that map to messaging components. The Messaging connection sends instructions to the reasoning engine that help the ASA reason and respond on an enhanced Facebook Messenger channel. The agent classifies the user's utterance to a topic and launches an action. Then it structures the response with the Rich Link Response adaptive response format and sends the response on Facebook Messenger.

To learn more, see [Set Up Connections in the Legacy Builder](#).

Channels

Channels are the messaging platforms, apps, and interfaces that you can deploy an agent to. Channels include the Agentforce panel in Lightning Experience, the Salesforce mobile app, Slack, messaging platforms, and email. Channel support varies by agent type. Some agent types and templates are available for your workforce, and you can add others to your customer-facing channels.

Omni-Channel Flows

Omni-Channel flows make it easy to route agent conversations. These flows use the Route Work action to route conversations and their associated records, such as messaging session and email records. Agents that connect to messaging or email have at least one inbound and outbound Omni-Channel flow.

When a customer interacts with an agent on a channel, a record associated with the conversation is created. Then, an inbound Omni-Channel flow routes the record from the customer channel to an agent. For example, when a customer sends a message on WhatsApp, an inbound Omni-Channel flow routes the conversation from WhatsApp to an Agentforce Service agent. You can connect your agent to multiple inbound flows, but each inbound flow can be connected to one agent only.

Agents use an outbound Omni-Channel flow to route conversations to another destination, such as a service rep, queue, or different agent. You can customize an outbound Omni-Channel flow to meet your business needs. For example, if you have multiple destinations that each excel at a different use case, you can add a Decision element to the flow that routes the conversation to the most relevant destination. You can connect your agent to multiple outbound flows, and each outbound flow can be connected to multiple destinations.

To learn more about Omni-Channel flows, see [Route Work with Omni-Channel](#).

Escalation

When a customer or employee wants to chat with a person or the conversation becomes

complex or sensitive, the agent launches the Escalation topic. For some channels, the topic transfers the conversation to another destination using the agent's outbound Omni-Channel flow. The conversation history, including messages and information gathered, is also transferred to the next destination. You can customize the Escalation topic by adding specific instructions and agent actions. For example, you can customize the Escalation topic to create a case when transferring the conversation is unsuccessful or isn't supported for your channel. You can also customize the message the agent sends before it transfers a conversation.

To learn more about the Escalation topic, see [Transfer Conversations from an Agent with an Omni-Channel Flow](#).

Explore Standard Connections and Adaptive Responses Formats

Learn about the agent connections and adaptive response formats that Salesforce provides out of the box in our comprehensive reference library.

Set Up Connections in Agentforce Builder

To get started with deploying your agent to channels, add connections to it. Each connection includes behind-the-scenes instructions that help an agent reason and respond for one or more channels. Each connection contains adaptive response formats that help your agent structure responses and deliver multimedia content, such as images, buttons, links, and videos. You can find adaptive response formats and other settings, including the Omni-Channel flows that route conversations to and from an agent, in your connection settings.

Set Up Connections in the Legacy Builder

To get started with deploying your agent to channels, set up connections. Each connection includes behind-the-scenes instructions that help an agent reason and respond for one or more channels. Each connection contains adaptive response formats that help your agent structure responses and deliver multimedia content, such as images, buttons, links, and videos. You can find adaptive response formats and other settings, including the Omni-Channel flows that route conversations to and from an agent, in your connection settings.

Connect an Agent to Lightning Experience and Mobile in the Legacy Builder

Deploying Agentforce Employee agents to Lightning Experience and the Salesforce mobile app is as easy as activating your agent.

Connect an Agent to Slack in the Legacy Builder

When you deploy an Agentforce Employee agent in Slack, your team can collaborate with agents in the same place where they already collaborate with each other.

Connect an Agent to Messaging

Route conversations to your Agentforce Service agents and Agentforce Employee agents with messaging channels, including Enhanced Chat and other enhanced messaging channels. Learn how to use context variables, multiple languages, and progress indicators in messaging channels.

Connect an Agent to Email in the Legacy Builder

Agentforce Service agents can autonomously respond to customer email inquiries. For example, if a customer emails you asking when their package will arrive, your agent can respond to them with the estimated delivery date and tracking number. Email responses are grounded in your Agentforce Data Libraries.

Connect a Service Agent to Telephony in the Legacy Builder

Route voice conversations to your Agentforce Service agents. Learn how to create a telephony connection, configure voice mode settings, and route calls to your agent.

[Transfer Conversations from an Agent with an Omni-Channel Flow](#)

When an agent encounters conversations that it can't resolve, it uses the Escalation topic to escalate the conversation. In the new Agentforce Builder, you can also run the Escalation topic using the escalate utility function in Agent Script. Escalation and transferring works differently depending on the agent type and channel. You can customize the experience that customers receive when transferring isn't possible.

[Activate or Deactivate Your Agent](#)

Activate your agent to make it available to your customers or employees. When an agent is deployed to one or more channels, including the Agentforce panel, activating the agent makes it immediately available to your users.

Explore Standard Connections and Adaptive Responses Formats

Learn about the agent connections and adaptive response formats that Salesforce provides out of the box in our comprehensive reference library.

See Also

[Standard Agent Connection Reference](#)

[Standard Adaptive Response Format Reference](#)

Set Up Connections in Agentforce Builder

To get started with deploying your agent to channels, add connections to it. Each connection includes behind-the-scenes instructions that help an agent reason and respond for one or more channels. Each connection contains adaptive response formats that help your agent structure responses and deliver multimedia content, such as images, buttons, links, and videos. You can find adaptive response formats and other settings, including the Omni-Channel flows that route conversations to and from an agent, in your connection settings.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To build and manage agents:

[Manage AI Agents AND the required permissions for your agent type](#)

Before you begin, create an agent and turn on the required features for your channels.

Currently, you can add the Messaging connection and Enhanced Chat v2 connection to Agentforce Service agents in the new Agentforce Builder.

1. From the App Launcher, enter *Agent*, and then select the **Agentforce Studio** app.
2. On the Agents tab, click the name of your agent.
3. On the Explorer panel, click . Then select **Add Connection**.
4. On the Add Connections window, select one or more connections. Then, click **Add to Agent**.
You only see the connections available for your agent. For more information about each connection, see [Standard Agent Connection Reference](#).
5. To complete setup for a connection, select its name on the Explorer panel.

After you complete setup for a connection, you can test it by chatting with your agent on the connected channel.

Set Up Connections in the Legacy Builder

To get started with deploying your agent to channels, set up connections. Each connection includes behind-the-scenes instructions that help an agent reason and respond for one or more channels. Each connection contains adaptive response formats that help your agent structure responses and deliver multimedia content, such as images, buttons, links, and videos. You can find adaptive response formats and other settings, including the Omni-Channel flows that route conversations to and from an agent, in your connection settings.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

User Permissions Needed	
To build and manage agents:	Manage AI Agents AND the required permissions for your agent type

Before you begin, create an agent and turn on the required features for your channels.

1. From Setup, in the Quick Find box, enter *Agents*, and then select **Agentforce Agents**.
2. Click the name of your agent. Then, on the Details page, click **Open in Builder**.
3. In the legacy builder, click the **Connections** tab. On the panel, if you see an option to turn on the updated connections experience, click **Turn It On**.
4. To add a connection your agent, click **Add**. Depending on the agent template that your agent uses, some connections are included by default.
5. On the Add Connections window, select one or more connections. Then, click **Add to Agent**. You only see the connections available for your agent. For more information about each connection, see [Standard Agent Connection Reference](#).

6. On the Connections panel, you see the connections that you added to your agent. To complete setup for a connection, click the connection name.

After you complete setup for a connection, you can test it by chatting with your agent on the connected channel.

See Also

- [Standard Agent Connection Reference](#)
- [Standard Adaptive Response Format Reference](#)

Connect an Agent to Lightning Experience and Mobile in the Legacy Builder

Deploying Agentforce Employee agents to Lightning Experience and the Salesforce mobile app is as easy as activating your agent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

✓ This article applies to: Agentforce Employee agents

✗ This article doesn't apply to: Agentforce Service agents

To learn about channel support for other agent types, see the documentation for that type.

User Permissions Needed

To connect an Employee agent to Lightning Experience and mobile:

Manage AI Agents

OR

Customize Application

Before connecting your agent to Lightning Experience or the Salesforce mobile app, [give your users access to your agent](#). You can adjust user access while your agent is active.

When you [activate your agent](#), it's available in the Agentforce panel in Lightning Experience and in the Salesforce mobile app for all users with access. If a user has access to more than one agent in the Agentforce panel, the user can select which agent to interact with from a dropdown menu.

Connect an Agent to Slack in the Legacy Builder

When you deploy an Agentforce Employee agent in Slack, your team can collaborate with agents in the same place where they already collaborate with each other.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

✓ This article applies to: Agentforce Employee agents

✗ This article doesn't apply to: Agentforce Service agents

To learn about channel support for other agent types, see the documentation for that type.

User Permissions Needed

To connect an Employee agent to Slack:	Manage AI Agents
	OR
	Customize Application

Before connecting your agent to Lightning Experience or the Salesforce mobile app, [give your users access to your agent](#), and then [activate it](#).

To make an agent available in Slack, follow the steps in [Set Up and Manage Agentforce in Slack](#).

First, create a connection between Salesforce and your Slack workspace.

- Create and configure a permission set for a Salesforce integration user. The integration user is used to get the information necessary to install your agent. It requires View All Data access to any Salesforce objects that you want to use in Slack. It doesn't need user permissions for any agent types.
- Map your users' Salesforce accounts to their Slack accounts. When an agent interacts with a user in Slack, the agent automatically respects the user's Salesforce licenses, permissions, and other access controls.

Next, connect your agent to Slack. Add Slack as an external app in your agent's Messaging connection. Then, activate your agent and install it in Slack.

 **Note** When you're connecting an Agentforce Employee agent to Slack, you can skip the Assign Access to an Agent step. Access to Agentforce Employee agents is managed in Salesforce and applied automatically in Slack.

See Also

- [Trailhead: Connect Your Agentforce Org with Slack](#)
- [Trailhead: Agentforce Configuration for Slack Deployment](#)

Connect an Agent to Messaging

Route conversations to your Agentforce Service agents and Agentforce Employee agents with messaging channels, including Enhanced Chat and other enhanced messaging channels. Learn how to use context variables, multiple languages, and progress indicators in messaging channels.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

✓ This article applies to: Agentforce Service agents and Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

Enhanced Chat

Enhanced Chat is Salesforce's messaging channel. It allows Agentforce agents to handle customer interactions directly from your website or mobile app. Enhanced Chat currently offers two versions: Enhanced Chat v1 and Enhanced Chat v2.

[Connect a Service Agent to Other Messaging Channels](#)

Route conversations to a service agent with enhanced messaging channels, including Bring Your Own Channel (BYOC).

[Use Context Variables in Messaging Conversations](#)

Personalize agent conversations over messaging channels with context variables. Context variables let your agent use Messaging Session record fields as action inputs.

Enhanced Chat

Enhanced Chat is Salesforce's messaging channel. It allows Agentforce agents to handle customer interactions directly from your website or mobile app. Enhanced Chat currently offers two versions: Enhanced Chat v1 and Enhanced Chat v2.

Both versions of Enhanced Chat share these key features and capabilities

- Autonomous issue resolution: The Agentforce agent can autonomously process incoming requests and resolve inquiries. Resolve your customer requests such as billing questions, booking appointments, or finding order status with minimal wait time.
- Escalation to service reps: Escalate the conversation from an Agentforce agent to a human service representative when necessary or when specifically requested by your customer.

- Interactive content: Leverage clickable messaging components to provide the interactive, visually rich experience that customers expect from modern messaging channels.

Enhanced Chat v2

Enhanced Chat v2 is the latest messaging interface optimized for a modern interaction experience and agentic use cases. It supports customizing through custom lightning types enabling you to tailor interactions beyond standard messaging components such as rich link previews or quick replies.

Enhanced Chat v2 offers these key features and capabilities.

- Modern Interaction Experience: Adopt a refreshed, Agentforce-style branding designed to be modern out of the box.
- Custom Content: Define and render standard and Custom Lightning Types, allowing you to showcase custom Lightning Web Components within a chat.
- Agentic Features: Support advanced features for agents, such as token streaming.
- Performance: Experience improved chat window loading times.
- Context Events API: Enable the passing of user session details (such as current page URL and search activity) to the agent by supporting context events through a new API (utilAPI).

To connect a service agent to Enhanced Chat v2, see [Connect a Service Agent to Enhanced Chat v2](#).

Enhanced Chat v1

Enhanced Chat v1, formerly known as Messaging In-App and Web, is highly configurable and supports web and mobile chat experiences tailored for large enterprises.

Enhanced Chat v1 offers these key features and capabilities.

- Customization: Configure extensive UI branding options, leveraging its high degree of configurability.
- Agent Routing: Set Business Hours and Agent Availability for transfers and routing. Display Estimated Wait Time and Queue Position to the customer.
- Security and Authentication: Support user verification and set authorization token expiration times for both verified and unverified users.
- Customer Actions: Enable customers to send attachments to agents and download conversation transcripts.
- Messaging Components: Include interactive elements and automated responses, such as rich links, various question formats, and auto-responses with post-chat surveys.
- Client APIs: Access a wider range of Client APIs, including those for User Verification, Hidden Pre-Chat, Populate Pre-Chat Form Fields, and Auto-Responses.

To connect an agent to Enhanced Chat v1, see [Connect an Agent to Enhanced Chat v1](#).

Choosing Your Enhanced Chat Version

Choose between Enhanced Chat v1 and Enhanced Chat v2 based on your specific use case,

implementation, and the features available in each version.

-  **Note** If you deploy both versions on the same website, messages may fail to appear in the Enhanced Chat v1 version. This is especially true for Lightning Types, as Enhanced Chat v1 does not support them. We recommend against mixing v1 and v2 deployments on the same domain to prevent unexpected behavior.

Here are some guidelines to help you choose the right version.

	Enhanced Chat v2	Enhanced Chat v1
Feature Availability	Enhanced Chat V2 is the next version, offering a redesigned experience that evolves from v1 and introduces modern capabilities, such as Custom Lightning Types.	See Compare Enhanced Chat v1 to Enhanced Chat v2 for a full feature list by version.
Technical Requirements	Use Enhanced Chat v2 for a modern aesthetic, better performance, and the ability to leverage custom rich content using Lightning Types.	Use Enhanced Chat v1 for use cases that require extensive configurability and need complex implementation features such as pre-chat forms, or post-chat surveys.
Implementation/Migration Path	If you are a new Agentforce customer or don't currently use other messaging channels, consider implementing Enhanced Chat v2. If you are an existing customer and Enhanced Chat v2 meets your needs, migrate to v2 with just a few clicks to use the same agent.	Use Enhanced Chat v1 if Enhanced Chat v2 doesn't meet your needs.
Agent Support	Currently, Enhanced Chat v2 only supports Agentforce Service Agents.	Enhanced Chat v1 supports both Agentforce Service Agents and Agentforce Employee Agents.

[Connect an Agent to Enhanced Chat v1](#)

Connect an Agentforce Service agent to Enhanced Chat v1. Connect an Agentforce Employee agent to your Experience Cloud site with Enhanced Web Chat v1.

[Use Additional Languages in Enhanced Chat Conversations](#)

Reach more customers and employees with a multi-language agent. After you select additional

languages in your agent's language settings and set up an Enhanced Chat channel, finish setting up additional languages for your agent.

Connect a Service Agent to Enhanced Chat v2

Route conversations to a service agent with Enhanced Chat v2.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

✓ This article applies to: Agentforce Service agents

✗ This article doesn't apply to: Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

USER PERMISSIONS NEEDED

To build and manage Service Agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

 **Warning** Make sure that the routing procedures don't simultaneously route conversations to a service rep and an AI agent. For more information, see [Knowledge Article: Messaging Session Stuck in Waiting or Inactive Status When a Bot and an Agent Are Engaged](#).

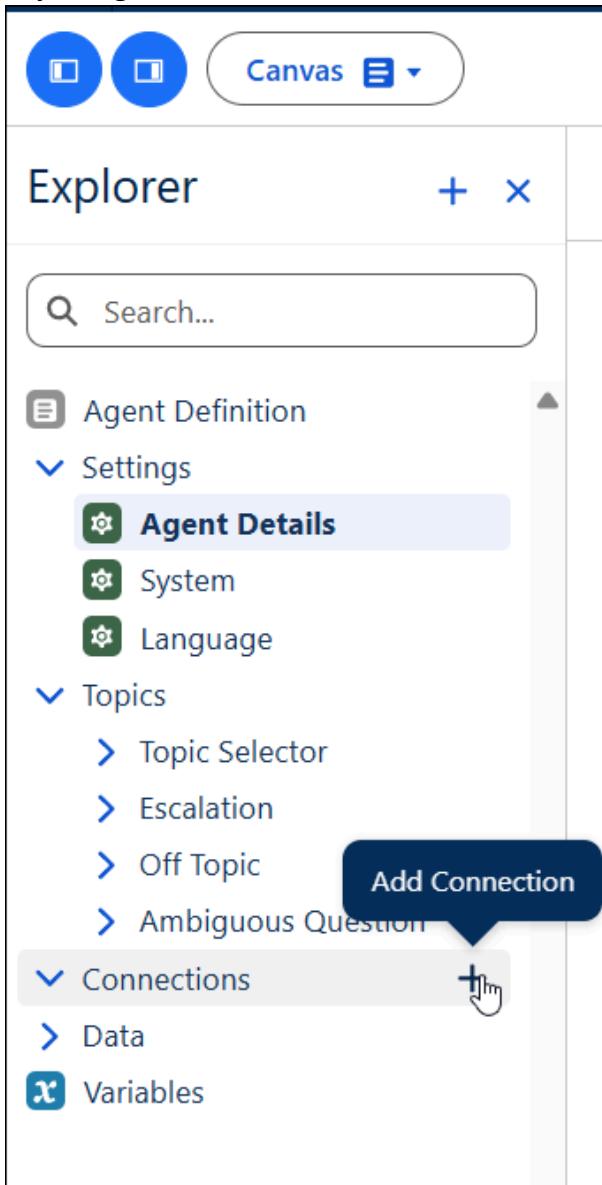
 **Note** Enhanced Chat v2 currently supports unauthenticated users for external websites and guest users for Salesforce sites. User authentication isn't yet supported.

Connect a Service Agent to Enhanced Chat v2 in Agentforce Builder

To connect a service agent to Enhanced Chat v2 in the new Agentforce Builder, add the Enhanced Chat v2 connection. Agentforce Builder creates the channel and the deployment for you.

1. From the App Launcher, enter Agent, and then select the Agentforce Studio app. On the Agents tab, click the name of your agent.
2. In the Explorer panel, under connections, click **Add Connection**. In the Add Connections window, select Enhanced Chat v2 and then click **Add to Agent**. Make sure to activate and commit the version

of your agent.



3. From Connections, expand Enhanced Chat v2, and click **Routing**.
4. To enable escalation to a human service rep, specify the escalation flow and the escalation message for your agent.
5. In the Enhanced Chat Channels section, click **New Channel**.

The screenshot shows the 'Agent Details' tab selected in the top navigation bar. The main content area is titled 'Enhanced Chat V2'. Under the 'Escalation' section, there is a field labeled 'Escalation Flow' containing 'messagingFlow'. Below it, an 'Escalation Message' field contains the text 'Transferring to a customer service rep now'. A note below the message field says '213 characters remaining'. The 'Enhanced Chat Channels' section indicates that the agent needs a channel, with a 'New Channel' button available. The left sidebar shows the navigation tree, with 'Routing' selected under 'Topics'.

6. In the New Channel window, specify these field values.
 - Name: Name of the channel
 - Developer Name: Developer name must be unique and can't be more than 80 characters. This field is automatically filled based on the name of the channel but you can edit if you select.
 - Domain: Your website where you'll host the deployment.
 - Fallback Queue: Select a queue to route to if no agent is available or if the agent is unable to connect. The queue must have a Messaging Session Object selected.
7. Review and accept the terms and conditions if shown and click Create Channel. You'll see the terms and conditions only when you create a Chat channel for the first time in your org.
8. The system now creates the messaging channel and deployment for the Enhanced Chat v2 connection. This process can take up to 10 minutes to complete.
9. To see the new channel, go to the Canvas view to find your new channel listed in the Enhanced Chat v2 connection page. If you don't see your new channel, refresh the page.
10. In the channel section, click the channel name to open the setup page for the channel. Click the deployment name to go to the Embedded Service deployment page to view and edit the deployment settings.
11. On the Embedded Service Deployments Settings page, click **Test Enhanced Web Chat** to preview and verify your branding and configurations.
12. When you're ready, publish your site.
13. Add the Enhanced Chat v2 to your [external web site](#) or to your [Salesforce site](#).

Route Messages Directly to a Service Agent in the Legacy Builder

To connect a service agent to Enhanced Chat v2, first create an Enhanced Chat v1 and switch to v2 before publishing the embedded service deployment. If you've created a channel, go directly to step 2.

1. [Create an Enhanced Chat v1 Messaging Channel](#). In the Channel Routing window, enter these field values.
 - Routing Type: Agentforce Service Agent
 - Agentforce Service Agent: Select your agent's name. If your agent name doesn't appear, activate your agent, and try again.
 - Fallback Queue: Select a messaging queue to route to if no agent is available.
2. On the Embedded Service Deployment Settings page for the deployment that you created, click **Switch to v2**.
3. Click **Switch & Publish**.
4. On the Embedded Service Deployments Settings page, click **Test Enhanced Web Chat** to preview and verify your branding and configurations.
5. Agents connected to Enhanced Chat v2 use the Escalation topic and an outbound Omni-Channel flow to transfer conversations. Set up [outbound routing](#) for your agent to support escalations.
6. When you're ready, publish your site.
7. Add the Enhanced Chat v2 to your [external web site](#) or to your [Salesforce site](#).

Route Messages Through an Omni-Flow in the Legacy Builder

Route messages to a service agent by using an Omni-Channel flow.

1. [Create an inbound Omni-Channel flow](#) from scratch that routes messages to your agent.
 2. For the Route Work action in your inbound Omni-Channel flow, enter these field values.
 - Record ID: The record ID variable that you created to store values in your Omni-Channel flow in step 1.
 - Service Channel: Messaging
 - Route To: Select the Agentforce Service Agent type, and then select your agent's name. If your agent type and name don't appear, activate your agent, refresh Flow Builder, and try again.
 - A messaging queue. When your inbound Omni-Channel flow can't route conversations to your agent, it sends the conversation to this queue. Select a messaging queue that is configured to support the Messaging Session Object.
 3. Create an Enhanced Chat v1 Messaging Channel. Add your inbound flow to the channel, and then activate the channel. You can connect your agent to multiple inbound channels, but you can connect an inbound channel to only one agent.
 4. Open your agent in Agentforce Builder. On the Connections panel, confirm that your inbound Omni-Channel flow appears in the Inbound Routing section of the Enhanced Chat v2 connection. If a flow doesn't appear, activate the flow and refresh the builder.
-  **Tip** If you don't see the Enhanced Chat v2 connection, turn on the new Connections panel experience on the Connections tab.
5. On the Embedded Service Deployment Settings page for the deployment that you created, click **Switch to v2**.
 6. Click **Switch & Publish**.
 7. On the Embedded Service Deployments Settings page, click **Test Enhanced Web Chat** to preview and verify your branding and configurations.
 8. Agents connected to Enhanced Chat v2 use the Escalation topic and an outbound Omni-Channel flow

- to transfer conversations. Set up [outbound routing](#) for your agent to support escalations.
9. When you're ready, publish your site.
 10. Add the Enhanced Chat v2 to your [external web site](#) or to your [Salesforce site](#).

Use Context Variables in Enhanced Chat v2 Conversations

Personalize agent conversations over messaging channels with context variables. Context variables let your agent use Messaging Session record fields as action inputs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

✓ This article applies to: Agentforce Service agents

✗ This article doesn't apply to: Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

USER PERMISSIONS NEEDED

To build and manage Service agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To build and manage Employee agents:

Manage AI Agents and Manage Agentforce Employee Agents

OR

Customize Application

Before you begin, [connect your service agent to Enhanced Chat v2](#).

Context variables let you map Messaging Session object fields to messaging channels. For example, to save your agent from having to ask for common information conversationally, you can configure your agent to reference any Messaging Session object field, including the ones populated via a pre-chat form. This data can even be used as an input for actions. We don't recommend using context variables for authentication.

Before updating context variables, [deactivate your agent](#).

1. Choose variable fields.
 - a. On the Agentforce Agents Setup page, click the name of your agent to open its Details page.
 - b. Click **Open in Builder** and then select the **Context** tab.
 - c. In the Session Variables section, select a variable.
 - d. To add variable fields to your agent, click **Update Included Fields**. Select the fields that you want the agent to use, and then save your changes.

By default, agents include a Messaging Session variable that's mapped to a `MessagingSession` record. Agents can use the information stored in the `Messaging Session ID`, `Messaging User ID`, and other included fields. They can also automatically update the `Messaging Session` record as they chat with customers.

You can create custom context variable fields that appear in your agent's `Messaging Session` context variable. To create custom variable fields, [add custom fields to the `Messaging Session` object](#).

2. To use a context variable field during agent conversations, add the field API name to instructions and use the fields in action inputs.

You can't test context variable use cases in Agentforce Builder because using variables requires a `Messaging Session` record. To test context variables, create a messaging session as a channel experience.

Show Progress Indicators in Enhanced Chat v2 Conversations

Progress indicators tell the messaging user what actions an agent is taking behind the scenes of an Enhanced Chat session.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

✓ This article applies to: Agentforce Service agents

✗ This article doesn't apply to: Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

Progress indicators are turned on by default in Enhanced Chat v2 and cannot be turned off. You can customize branding and customize the labels of your progress indicators.

1. From Setup, in the Quick Find box, enter `Embedded Service Deployments`, and click **Embedded Service Deployments**.
2. Click to edit your `Messaging for Web` deployment.

3. To change the color of the progress indicator, on the Embedded Service Deployment Settings page, in the Branding card, click Select Branding.
 - a. In the Component Colors section, change the update the color settings to your preferred color for the System Messages and Placeholder Text component.
4. To customize system message labels for the progress indicators, on the Embedded Service Deployment Settings page, in the Custom Labels card, click **Set Custom Labels**. Apply these values to filter for the system message labels and update them to your preferred message.
 - Chat Group: Chat in Progress
 - Label Group: Chat Body
 - Label Type: System Messages
5. Back on the Embedded Service Deployment Settings page, click Publish.

Personalize Enhanced Chat v2 Interface with Custom Lightning Types

With custom Lightning Types, you can enhance the UI of custom agent actions for Agentforce Employee agents in the Agentforce panel in Lightning Experience. This capability applies to agent actions that use Apex as the data type for inputs or outputs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

✓ This article applies to: Agentforce Service agents

✗ This article doesn't apply to: Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

1. [Create a custom lightning type bundle](#) in Setup.
2. Configure the Lightning type components.
 - a. Customize how user input is collected by [defining the input component](#).
 - b. Customize how data is presented to the user by [defining the output component](#).
3. Integrate the custom Lightning type into your agent action. See [Integrate a Custom Lightning Type with an Agent Action](#).
4. Deploy your custom Lightning type bundle to Lightning experience.

 **Note** Testing or previewing custom Lightning types for Agentforce Service agent in Agentforce Builder is not supported. To test and preview custom Lightning types for Agentforce Service agent, navigate to the Embedded Service Deployments Settings page and click **Test Enhanced Web Chat**.

Troubleshoot Lightning Types in Enhanced Chat v2

Troubleshoot Lightning Types in Enhanced Chat v2

Solve common custom Lightning type rendering issues.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

✓ This article applies to: Agentforce Service agents

✗ This article doesn't apply to: Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

In some cases, the issue can be resolved by re-publishing your Embedded Service deployment. Republishing the Embedded Service deployment is especially important and required when you make these changes.

- If you change the service agent when the Routing Type is configured as Agentforce Service Agent.
- If you add a new agent in your omni-channel routing flow when the Routing Type is set to Omni-Flow.
- If you add new actions to your agent.
- If you edit the inputs or outputs for any existing actions.
- If you change the Output Rendering type for any output.
- If you activate a different version of your agent.

Issue: Lightning Type Response Renders as Text

If you see a text response instead of the expected custom Lightning Types in the UI, verify your settings, as custom Lightning Types are only supported in Enhanced Chat v2. Verify these settings.

- Agent Connections: The agent is deployed to Enhanced Chat v2. Open your agent in Agentforce Builder and ensure the Enhanced Chat V2 connection is added to your agent. See [Set Up Connections](#).
- Embedded Service Deployment: On the Embedded Service Deployment page, confirm that the deployment's version is set to V2. See [Connect a Service Agent to Enhanced Chat v2](#).
- Access to Apex Classes and Flows: The Agent User Profile and the Sys Admin Profile have access to the invocable Apex classes and flows. See [Set Apex Class Access from Profiles](#) and [Provide Access to Use Flows](#).

Issue: Lightning Type Response Not Rendered

To ensure custom Lightning types render completely, include them in the published deployment. If they

are not rendered, re-publish your Embedded Service deployment to resolve the issue.

For other troubleshooting issues with Enhanced Chat see [Troubleshoot Enhanced Chat Setup](#).

Connect an Agent to Enhanced Chat v1

Connect an Agentforce Service agent to Enhanced Chat v1. Connect an Agentforce Employee agent to your Experience Cloud site with Enhanced Web Chat v1.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

 This article applies to: Agentforce Service agents and Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

- [Connect a Service Agent to Enhanced Chat v1](#)
- [Connect an Employee Agent to Enhanced Web Chat v1](#)

 **Warning** Ensure that the routing procedures don't simultaneously route conversations to a service rep and an AI agent. For more information, see [Knowledge Article: Messaging Session Stuck in Waiting or Inactive Status When a Bot and an Agent Are Engaged](#).

For detailed instructions on creating Omni-Channel flows for Enhanced Chat, see [Prepare a Salesforce Org for Enhanced Chat](#).

Show Progress Indicators in Enhanced Chat v1 Sessions

Progress indicators tell the messaging user what actions an agent is taking behind the scenes of an Enhanced Chat session. Standard actions come with pre-written progress indicators, such as "Doing research" or "Analyzing". To customize progress indicators, create a custom agent action.

Connect a Service Agent to Enhanced Chat v1

Route conversations to a service agent with Enhanced Chat v1.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To build and manage Service Agents:

Manage Agentforce Service Agents AND Manage

USER PERMISSIONS NEEDED

AI Agents

OR

Customize Application

1. [Create an inbound Omni-Channel flow](#) from scratch that routes messages to your agent. For the Route Work action in your inbound Omni-Channel flow, enter these field values.
 - Record ID: The recordID variable that you created.
 - Service Channel: Messaging
 - Route To: Select the Agentforce Service Agent type, and then select your agent's name. If your agent type and name don't appear, activate your agent, refresh Flow Builder, and try again.
 - A messaging queue. When your inbound Omni-Channel flow can't route conversations to your agent, it sends the conversation to this queue.
2. Add your inbound flow to a messaging channel, and then activate the channel. You can connect your agent to multiple inbound channels, but an inbound channel can be connected to only one agent.
3. Open your agent in Agentforce Builder. Save and commit your agent and then select the Messaging connection. Confirm that your inbound Omni-Channel flow appears in the Inbound Routing section of the canvas. If a flow doesn't appear, activate the flow and refresh the builder.
4. Open your agent in the legacy Agentforce Builder. On the Connections panel, confirm that your inbound Omni-Channel flow appears in the Inbound Routing section of the Messaging connection. If a flow doesn't appear, activate the flow and refresh the builder.
5. Add your agent to a messaging interface by configuring an embedded service deployment.
 - [Configure an Enhanced Web Chat Deployment](#)
 - [Configure an Enhanced Web Chat Deployment in an Experience Builder or Commerce Cloud Site](#)
 - [Configure an Enhanced In-App Chat Deployment](#)

Agents connected to a messaging channel use the Escalation topic and an outbound Omni-Channel flow to transfer conversations. After you've set up inbound routing for your agent, [set up outbound routing](#).

Connect an Employee Agent to Enhanced Web Chat v1

Add an Agentforce Employee agent to your Experience Cloud site with Enhanced Web Chat v1.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To build and manage Employee agents:

Manage AI Agents

OR

Customize Application

USER PERMISSIONS NEEDED

To create an Experience Cloud site: Create and Set Up Experiences AND View Setup and Configuration

To customize or publish an Experience Cloud site: Create and Set Up Experiences AND View Setup and Configuration AND be a member of the site

OR

View Setup and Configuration AND be a member of the site AND have appropriate [role-based site access](#)

To set up Omni-Channel Flow and Messaging: Customize Application

Agentforce Employee agents connected to Enhanced Web Chat on Experience Cloud sites run in the context of the logged-in user. Permissions and licenses must be assigned to each user. Unauthenticated users aren't currently supported.

Before you begin:

- Give users access to your [Agentforce Employee agent](#). Following the principle of least privilege, assign each user any licenses and permissions necessary to run agent actions.
 - To learn more about user access to Experience Cloud sites, see [Who Can See What in Experience Cloud Sites](#).
1. [Create an inbound Omni-Channel flow](#) from scratch that routes messages to your agent, and then activate your flow.
For the Route Work action in your inbound Omni-Channel flow, enter these field values.
 - Record ID: The recordID variable that you created.
 - Service Channel: Messaging
 - Route To: Select the Agentforce Employee agent type, and then select your agent's name. If your agent type and name don't appear, activate your agent, refresh Flow Builder, and try again.
 - A messaging queue. When your inbound Omni-Channel flow can't route conversations to your agent, it sends the conversation to this queue.
 2. [Create an Enhanced Chat channel](#).
 - a. Add the domain of your Experience Cloud site to your messaging channel. You can copy and paste your domain name from the Domains Setup page.
 - b. Add your inbound flow to your messaging channel, and then activate the channel. You can connect your agent to multiple inbound channels, but an inbound channel can be connected to only one agent.
 - c. After you finish, [turn on credential-based user verification for your channel](#). Later, you'll add user verification to your site.
 3. Open your agent in the legacy Agentforce Builder. On the Connections panel, confirm that your inbound Omni-Channel flow appears in the Inbound Routing section of the Messaging connection. If a flow doesn't appear, activate the flow and refresh the builder.

4. Add your agent to your site.
 - a. [Configure an embedded service deployment.](#)
 - b. [Add credential-based user verification to your site.](#)
 - c. Review and, if necessary, [adjust your site's security and privacy settings](#). For best performance with an embedded service deployment, we recommend setting your security level to Relaxed CSP: Permit Access to Inline Scripts and Allowed Hosts and adding your enhanced service URL to your trusted sites for scripts.
5. When you're ready, publish your site.

Agents connected to a messaging channel use the Escalation topic and an outbound Omni-Channel flow to transfer conversations. After you've set up inbound routing for your agent, [set up outbound routing](#).

Show Progress Indicators in Enhanced Chat v1 Sessions

Progress indicators tell the messaging user what actions an agent is taking behind the scenes of an Enhanced Chat session. Standard actions come with pre-written progress indicators, such as "Doing research" or "Analyzing". To customize progress indicators, create a custom agent action.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

 This article applies to: Agentforce Service agents and Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

-  **Note** These steps are required for Agentforce Employee agents connected to Enhanced Chat v1. These steps aren't required for Agentforce Employee agents connected to the Agentforce panel in Lightning Experience, the Salesforce mobile app, or Slack.

Access Progress Indicators for Your Agent

Standard agent actions come with pre-written loading text. You can specify your own loading text when you [create a custom agent action](#).

Turn On Progress Indicators in Enhanced Web Chat v1

Now that you've written progress indicators, allow Enhanced Web Chat to show them in the messaging conversation window.

1. From Setup, in the Quick Find box, enter *Embedded Service Deployments*, and click **Embedded Service Deployments**.

2. Click to edit your Messaging for Web deployment.
3. On the Embedded Service Deployment Settings page, in the Settings card, click **Edit Settings**.
4. Select **Show Typing Indicators**.
5. Save your changes.
6. Back on the Embedded Service Deployment Settings page, click **Publish**.

Customize the Branding of Your Progress Indicators

Progress indicators in Enhanced Chat are accompanied by a spinning wheel animation, which tells the user that an AI agent is at work behind the scenes. Optionally, change the color of the spinning progress indicator animation to match your branding.

1. From Setup, in the Quick Find box, enter *Embedded Service Deployments*, and click **Embedded Service Deployments**.
2. Click to edit your Messaging for Web deployment.
3. On the Embedded Service Deployment Settings page, in the Branding card, click **Select Branding**.
4. In the Contrast Color box, enter a hex code for your preferred color.
5. Save your changes.
6. Back on the Embedded Service Deployment Settings page, click **Publish**.

Use Additional Languages in Enhanced Chat Conversations

Reach more customers and employees with a multi-language agent. After you select additional languages in your agent's language settings and set up an Enhanced Chat channel, finish setting up additional languages for your agent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

✓ This article applies to: Agentforce Service agents and Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

USER PERMISSIONS NEEDED

To build and manage Service agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

USER PERMISSIONS NEEDED

To build and manage Employee agents:

Manage AI Agents and Manage Agentforce Employee Agents

OR

Customize Application

-  **Note** These steps are required for all agents that connect to Enhanced Chat, including Agentforce Employee agents that connect to Enhanced Web Chat.

Before you begin:

- Review [supported languages for Agentforce Service agents](#) or [supported languages for Agentforce Employee agents](#), and [considerations for language and locale support for Agentforce overall](#).
- Turn on [Translation Workbench](#) and add your additional languages as translated languages.
- [Update language settings](#).
- Connect your agent to [Enhanced Chat v1](#) or [Enhanced Chat v2](#).

1. On the Message Settings Setup page, click your Enhanced Chat channel's name.

2. Turn on the **Identify preferred language of messaging users** setting.

When an end user starts a conversation, Salesforce populates the Messaging User Language field of the Messaging Session record with the language specified in the deployment's [code snippet](#), Experience Builder site, or Commerce Cloud site.

3. Save your changes.

Connect a Service Agent to Other Messaging Channels

Route conversations to a service agent with enhanced messaging channels, including Bring Your Own Channel (BYOC).

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. [Required add-on licenses vary by agent type](#).

 This article applies to: Agentforce Service agents

 This article doesn't apply to: Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

USER PERMISSIONS NEEDED

To build and manage Service Agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application



Warning Ensure that the routing procedures don't simultaneously route conversations to a service rep and an AI agent. For more information, see [Knowledge Article: Messaging Session Stuck in Waiting or Inactive Status When a Bot and an Agent Are Engaged](#).

For detailed instructions on creating Omni-Channel flows for enhanced messaging channels other than Enhanced Chat channels, see [Route Service Cloud Messaging Sessions with Omni-Channel Flows](#).

1. Create an inbound Omni-Channel flow from scratch that routes messages to your agent. For the Route Work action in your inbound Omni-Channel flow, enter these field values.
 - Record ID: The recordID variable that you created.
 - Service Channel: Messaging
 - Route To: Select the Agentforce Service Agent type, and then select your agent's name. If your agent type and name don't appear, activate your agent, refresh Flow Builder, and try again.
 - A messaging queue. When your inbound Omni-Channel flow can't route conversations to your agent, it sends the conversation to this queue.
2. Add your inbound flow to a messaging channel, and then activate the channel. You can connect your agent to multiple inbound channels, but an inbound channel can be connected to only one agent.
3. Open your agent in Agentforce Builder. Save and commit your agent and then select the Messaging connection. Confirm that your inbound Omni-Channel flow appears in the Inbound Routing section of the canvas. If a flow doesn't appear, activate the flow and refresh the builder.
4. Open your agent in the legacy Agentforce Builder. On the Connections panel, confirm that your inbound Omni-Channel flow appears in the Inbound Routing section of the Messaging connection. If a flow doesn't appear, activate the flow and refresh the builder.

Agents connected to a messaging channel use the Escalation topic and an outbound Omni-Channel flow to transfer conversations. After you've set up inbound routing for your agent, [set up outbound routing](#).

Show Progress Indicators in Bring Your Own Channel

Progress indicators tell the messaging user what actions an Agentforce Service agent is taking behind the scenes of a Bring Your Own Channel messaging session. Standard actions come with pre-written progress indicators, such as "Doing research" or "Analyzing". To customize progress indicators, create a custom agent action.

See Also

[Trailhead: Quick Start: Build a Service Agent with Agentforce](#)

[Agentforce Workshop: Get Hands On with Service Agents](#)

Show Progress Indicators in Bring Your Own Channel

Progress indicators tell the messaging user what actions an Agentforce Service agent is taking behind the scenes of a Bring Your Own Channel messaging session. Standard actions come with pre-written progress indicators, such as "Doing research" or "Analyzing". To customize progress indicators, create a custom agent action.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

Access Standard Progress Indicators for Your Agentforce Service Agent

Standard agent actions come with pre-written progress indicators. When creating your [Agentforce Service Agent](#), add one or more [standard agent actions](#).

Write Custom Progress Indicators for Your Agentforce Service Agent

Before you enable progress indicators in Bring Your Own Channel, create an [Agentforce Service Agent](#). Then, create a [custom agent action](#) for your Agentforce Service Agent, which includes writing loading text for the different actions your agent can call in a conversation.

Turn On Progress Indicators in Bring Your Own Channel

Now that you've written progress indicators, allow Bring Your Own Channel to show them in the messaging conversation window.

This option is available if your Messaging partner supports it in the Conversation Channel Definition. Usage counts towards your high volume platform event allocation. See [Considerations and Limitations for Bring Your Own Channel and Bring Your Own Channel for CCaaS](#) for more information.

1. From Setup, in the Quick Find box, enter *Messaging Settings*, and click **Messaging Settings**.
2. Click to edit your Bring Your Own Channel for Messaging or Bring Your Own Channel for CCaaS Channel.
3. In the Event-Driven Settings card, click **Edit**.
4. Select **Show Agentforce agent progress indicator**.
5. Save your changes.

Use Context Variables in Messaging Conversations

Personalize agent conversations over messaging channels with context variables. Context variables let

your agent use Messaging Session record fields as action inputs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

✓ This article applies to: Agentforce Service agents and Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

USER PERMISSIONS NEEDED

To build and manage Service agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To build and manage Employee agents:

Manage AI Agents and Manage Agentforce Employee Agents

OR

Customize Application

 **Note** These steps are required for Agentforce Employee agents connected to Enhanced Chat. These steps aren't required for Agentforce Employee agents connected to the Agentforce panel in Lightning Experience, the Salesforce mobile app, or Slack.

Before you begin, connect your agent to a messaging channel.

- [Connect an Agent to Enhanced Chat v1](#)
- [Connect a Service Agent to Other Messaging Channels](#)

Context variables let you map Messaging Session object fields to messaging channels. For example, to save your agent from having to ask for common information conversationally, you can configure your agent to reference any Messaging Session object field, including the ones populated via a pre-chat form. This data can even be used as an input for actions. We don't recommend using context variables for authentication.

Before updating context variables, [deactivate your agent](#).

1. Choose variable fields.

- a. On the Agentforce Agents Setup page, click the name of your agent to open its Details page.
- b. Click **Open in Builder** and then select the **Context** tab.
- c. In the Session Variables section, select a variable.
- d. To add variable fields to your agent, click **Update Included Fields**. Select the fields that you want the agent to use, and then save your changes.

By default, agents include a Messaging Session variable that's mapped to a `MessagingSession` record. Agents can use the information stored in the `Messaging Session ID`, `Messaging User ID`, and other included fields. They can also automatically update the `Messaging Session` record as they chat with customers.

You can create custom context variable fields that appear in your agent's `Messaging Session` context variable. To create custom variable fields, [add custom fields to the `Messaging Session` object](#).

2. Add field values to the `Messaging Session` record by using a pre-chat form, your inbound Omni-Channel flow, or Pre-Chat API.
 - a. To use the Pre-Chat form, [create and customize an Enhanced Chat pre-chat form](#). You can add standard and custom fields to the pre-chat form. Then [map your pre-chat values to your messaging channel and update your inbound Omni-Channel flow](#).
 - b. To use your inbound Omni-Channel flow, customize your inbound Omni-Channel flow so that it passes information from previous messaging sessions to your agent. See [Persist Pre-Chat Inputs Across Messaging Sessions](#).
 - c. To use Pre-Chat API, send user data that isn't visible in the pre-chat form, known as hidden pre-chat fields, to your agent. See [Enhanced Web Chat Hidden Pre-Chat API](#), [iOS Hidden Pre-Chat API](#), and [Android Hidden Pre-Chat API](#).
3. To use a context variable field during agent conversations, add the field API name to instructions and use the fields in action inputs.

You can't test context variable use cases in Agentforce Builder because using variables requires a `Messaging Session` record. To test context variables, create a messaging session as a channel experience.

See Also

[Object Reference: Messaging Session](#)

Connect an Agent to Email in the Legacy Builder

Agentforce Service agents can autonomously respond to customer email inquiries. For example, if a customer emails you asking when their package will arrive, your agent can respond to them with the estimated delivery date and tracking number. Email responses are grounded in your Agentforce Data Libraries.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. [Required add-on licenses](#)

vary by agent type.

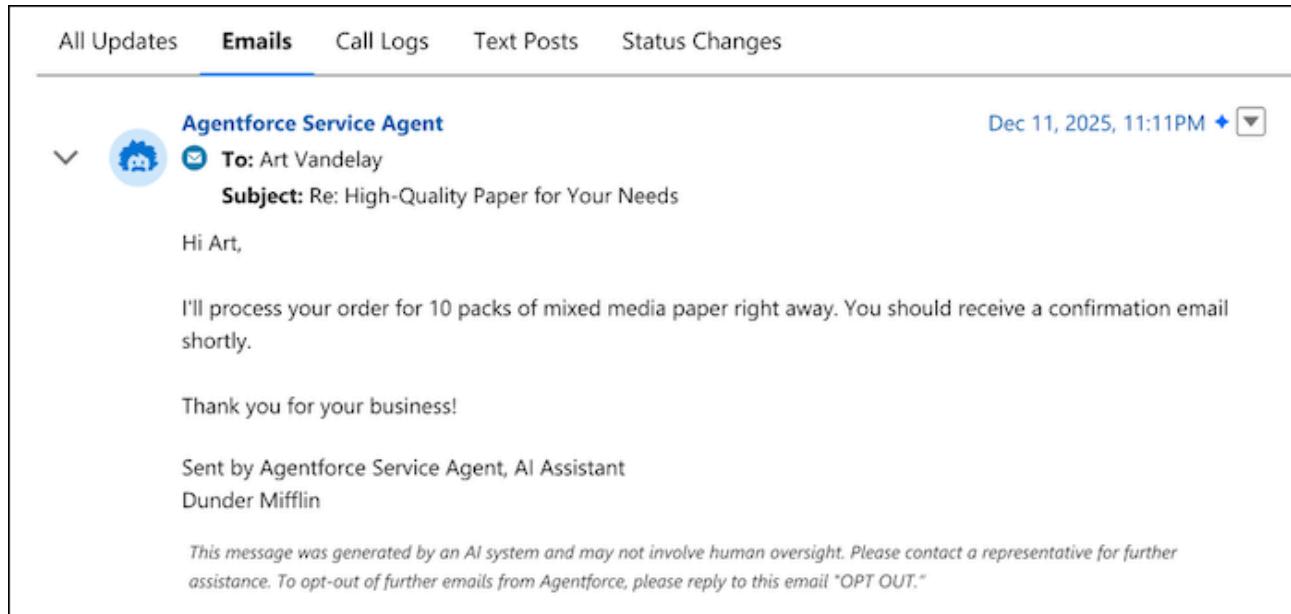
✓ This article applies to: Agentforce Service agents

✗ This article doesn't apply to: Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

USER PERMISSIONS NEEDED

To create email templates:	Lightning Experience User
To edit public email templates:	Modify All Data, Manage Public Lightning Email Templates, or template ownership
To create Agentforce Service Agent email configurations:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application
To edit routing addresses:	Customize Application
To create Omni-Channel flows:	Customize Application



All Updates **Emails** Call Logs Text Posts Status Changes

Agentforce Service Agent Dec 11, 2025, 11:11PM

To: Art Vandelay

Subject: Re: High-Quality Paper for Your Needs

Hi Art,

I'll process your order for 10 packs of mixed media paper right away. You should receive a confirmation email shortly.

Thank you for your business!

Sent by Agentforce Service Agent, AI Assistant
Dunder Mifflin

This message was generated by an AI system and may not involve human oversight. Please contact a representative for further assistance. To opt-out of further emails from Agentforce, please reply to this email "OPT OUT."

When an Agentforce Service agent emails a customer, the Sender field shows the Email-to-Case routing address to which their email was sent. The email includes a custom legal disclosure indicating that it was written using AI, and customers can request that their inquiry be escalated to a service rep. The email structure is based on a template that you create, and its content is determined by the topics, actions, and instructions that you add to your agent. An Omni-Channel flow controls when your agent can email customers, or you can use a basic alternative to a flow. You can monitor emails sent by your Agentforce Service agent in a custom report, and they also appear in the case feed like any other case email.

To get started with Agentforce for Service on Email, complete several key pre-setup tasks.

1. [Enable Flex Credits.](#)
2. [Create an Agentforce Service agent](#). Then select a data source to ground its responses, and activate the agent. Agentforce Service Agent on Email won't be visible in Setup until you [enable Agentforce](#).
3. If your agent includes a user verification topic, [remove it from the agent](#). Agentforce Service Agent on Email doesn't support end-user verification.
4. [Turn on and configure Email-to-Case](#), and add one or more verified routing addresses.
5. Enable Lightning threading for emails. [Learn more](#).

Considerations for Agentforce Service Agent on Email

Some features aren't supported in Agentforce Service Agent on Email. Review considerations and limitations for this tool.

Create an Email Template for Agentforce Service Agent on Email

Create a Lightning email template that defines the structure of all emails sent by your Agentforce Service agent. Classic email templates are not supported.

Create an Email Configuration for Agentforce Service Agent on Email

The email configuration connects your email template to an Agentforce Service agent. Create it in Setup, and then link it to one or more routing addresses.

Update Your Routing Logic for Agentforce Service Agent on Email

Nearly all of the puzzle pieces are in place, but Salesforce still needs to know when the agent should use your email template to email customers. We recommend creating an Omni-Channel flow that controls which cases are routed to your Agentforce Service agent versus a service rep.

Test Agentforce Service Agent on Email

If you're using an Omni-Channel flow for routing, test your flow with a new unused routing address. Then, switch to an active routing address when you're ready.

Monitor Emails Sent by an Agentforce Service Agent

To view and monitor emails sent by an AI agent, create a custom report or check the case feed for a specific case.

Considerations for Agentforce Service Agent on Email

Some features aren't supported in Agentforce Service Agent on Email. Review considerations and limitations for this tool.

- The Service agent processes and responds only to text in the email subject and email body, and not to any images or attachments. The email connection must be in place before an agent can use the email's subject as context for the response.
- If you want to intervene in a conversation, reassign the case from the AI agent to yourself.
- The Automated Case User must be set as the System User or a user with Customize Application permission.
- MessagingSession record isn't available to the Service agent when using the email channel.
- Agentforce doesn't automatically close cases when the conversation ends. You can create a scheduled Flow to close old cases based on the criteria you choose.
- The organization preference "Place User Signatures before Email Threads," which controls whether the signature appears before or after the original message quote, applies to user signatures defined in the

Email Setup page only. It doesn't apply to the signature you created when configuring Agentforce Service Agent on Email.

- For the Service agent to use Case Assignment Rules, you'll need to give the agent's user record the View case permission. And for the Service agent to update a case, you'll need to give the agent's user record both the View and Update case permissions. Keep the principle of least privilege in mind, and don't assign permissions to your Service agent that it doesn't need to do its job.
- In case of a runtime error, a case comment is created with error details and the case is reassigned to the default case owner for your organization.
- The Welcome and Error system messages are not used by Agentforce Service Agent on Email. Every email creates a new session, and context variables that are set by agent actions aren't maintained between sessions.
- Email responses sent by the Service agent are asynchronous, and response times can vary.
- Inbound emails handled by the Service agent count against your Agentforce for Service on Email daily transaction limit, which is 5,000 by default. You can ask Salesforce Customer Support to raise this limit.
- When you select Reply All on an email configuration, replies are limited to 20 recipients between the To and CC fields.
- If a single inbound email is sent to multiple routing addresses and a case doesn't already exist for the thread, a case is created for each routing address. The service agent will respond to one case, and add a comment to the other cases, pointing them to the case containing the actual response.
- If multiple inbound emails are received in quick succession on the same case, the service agent may not reply to each email individually. Instead, the agent may respond to all of the email messages in a single reply to the most recent email.
- Agentforce attempts to respond in the end-user's language and falls back to English if the end-user language isn't supported.
- [Salesforce for Outlook](#) Email-to-Case routing addresses aren't supported.

Create an Email Template for Agentforce Service Agent on Email

Create a Lightning email template that defines the structure of all emails sent by your Agentforce Service agent. Classic email templates are not supported.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

✓ This article applies to: Agentforce Service agents

✗ This article doesn't apply to: Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

USER PERMISSIONS NEEDED

To create email templates:	Lightning Experience User
To edit public email templates:	Modify All Data, Manage Public Lightning Email Templates, or template ownership
To create Agentforce Service Agent email configurations:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application
To edit routing addresses:	Customize Application
To create Omni-Channel flows:	Customize Application

1. From the App Launcher, select **Email Templates**.
2. Click **New Email Template**.
3. Enter a template name and description, and select **Case** as the related entity type.
4. Leave the subject blank. Emails sent using the template will use this subject format: *RE: (Subject of the customer's initial inquiry)*.
5. Optionally, select an Enhanced Letterhead.
6. In the HTML Value field, copy and paste the following text. (When a Service agent sends an email using the template, the Generated Content placeholder is replaced by the AI-generated response, which includes a greeting. The Legal Disclosure placeholder is replaced by your custom disclosure, which you will provide in the next step.) Optionally, add additional text or images to your template.
 - a. `[[[GENERATED_CONTENT]]]`
 - b. `[[[LEGAL_DISCLOSURE]]]`
7. Select a public folder and save your email template. You can't use a private folder for this step.

New Email Template

* = Required Information

Information

* Email Template Name <input type="text" value="AI Email Template"/>	Related Entity Type <input type="text" value="Case"/> ▾
Description <input type="text" value="Email template used by AI agent"/>	Folder <input type="text" value="Public Email Templates"/> Select Folder

Message Content

Subject <input type="text" value="An update on your case"/>	Enhanced Letterhead <input type="text" value="Search Enhanced Letterheads..."/>
HTML Value <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Source Font ▾ Size ▾ B <i>I</i> <u>U</u> <u>A</u> ▾ [] [] [] [] [] [] [] </div> <div style="border: 1px solid #ccc; padding: 5px; height: 150px;"> [[[GENERATED_CONTENT]]] [[[LEGAL_DISCLOSURE]]] </div>	

[Cancel](#)
[Save](#)

Create an Email Configuration for Agentforce Service Agent on Email

The email configuration connects your email template to an Agentforce Service agent. Create it in Setup, and then link it to one or more routing addresses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. [Required add-on licenses vary by agent type.](#)

 This article applies to: Agentforce Service agents

 This article doesn't apply to: Agentforce Employee agents

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1. To deploy your Agentforce for Service on Email agent to channels, set up the Service Email Connection. See [Set Up Connections in the Legacy Builder](#).
2. From Setup, enter *Agentforce* in the Quick Find box and select **Agentforce for Service on Email**.
3. Click **New Configuration**.
 - a. Enter a name for your configuration.
 - b. Select the email template you created.
 - c. Select an active Agentforce Service agent.
 - d. Enter a legal disclosure that lets the end user know that the email was written and sent by AI. The disclosure replaces `[[[LEGAL_DISCLOSURE]]]` in the sent email.
 - e. Select Reply All if you want Agents to reply to all email recipients, including those in the To and CC fields.
 - f. Click **Save and Next**.

Edit Configuration

- * Configuration Name ⓘ
Infiniwave AI Agent Email
- * API Name ⓘ
Infiniwave_AI_Agent_Email
- * Email Template ⓘ
Agentforce Service Agent On Email X
- * Agentforce Service Agent ⓘ
Agentforce Service Agent X
- * Agentforce Service Agent Signature ⓘ
Infiniwave Agent
- * Legal Disclosure ⓘ
This email is generated by an AI Agent.
Reply to all email addresses in the To and CC fields.
- Reply All ⓘ

Cancel Save and Next

4. Click **Go to Email-to-Case Setup**.
5. In the Routing Addresses section, click **Edit** next to the routing address that will receive inbound emails for the Service agent.
6. Under Agentforce Service Agent Settings, select the email configuration you created.



7. Save your changes. If you want to, follow the previous steps to link the configuration to additional routing addresses.

Update Your Routing Logic for Agentforce Service Agent on Email

Nearly all of the puzzle pieces are in place, but Salesforce still needs to know when the agent should use your email template to email customers. We recommend creating an Omni-Channel flow that controls which cases are routed to your Agentforce Service agent versus a service rep.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses

vary by agent type.

✓ This article applies to: Agentforce Service agents

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To learn about channel support for other agent types, see the documentation for that type.

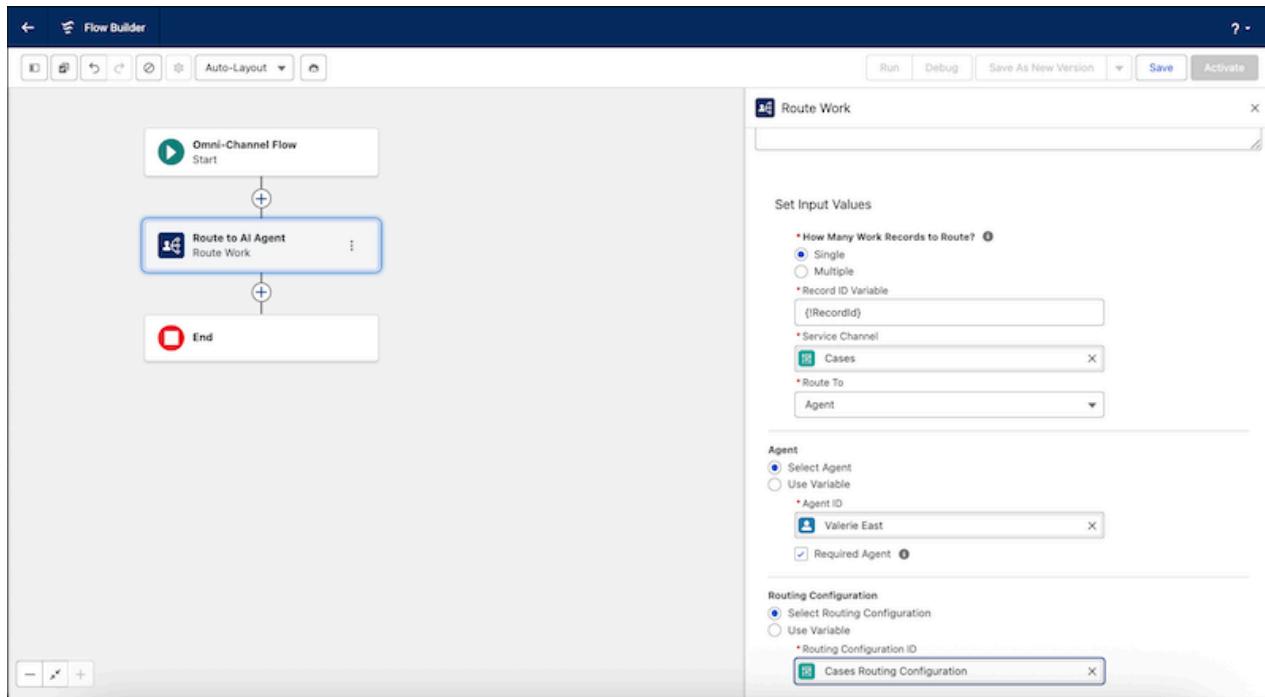
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Create an Omni-Flow

Use the route work action to set your Omni-Channel flow to route cases to the Agent Context User. This is an inbound flow to connect a case to an agent. You may choose to create an additional outbound flow that escalates a case to a service rep if an agent can't answer.

1. [Complete Omni-Channel setup](#), including a service channel for cases and routing configurations.
2. When creating your inbound Omni-Channel flow, select the option to route cases to an agent, then select the Agent User. To determine the correct value, select your agent from the Agentforce Agents setup page, and look at the Agent User field.



3. Make sure to select Required Agent in the Route Work action, and to create a recordId input parameter. If your flow has an input_record variable, ensure that its object type is Case; otherwise, the flow won't work. If you intend to use the same flow across multiple channels, it's best to include only a recordId input variable to avoid mismatches with the input_record object type and the channel.

Link the Flow to Your Routing Address

After you create your flow, link it to your routing address.

1. From Setup, enter Email-to-Case in the Quick Find box, then select Email-to-Case.
2. In the Routing Addresses section, click Edit next to the routing address you were viewing earlier.
3. Under Flow Settings, select the Omni-Channel flow that includes routing to your Agentforce Service agent, and select a fallback queue to receive cases if the flow isn't available. Note: Skills-Based and Direct-to-Agent routing must be enabled under the Omni-Channel settings page in Setup.



4. Save your changes.

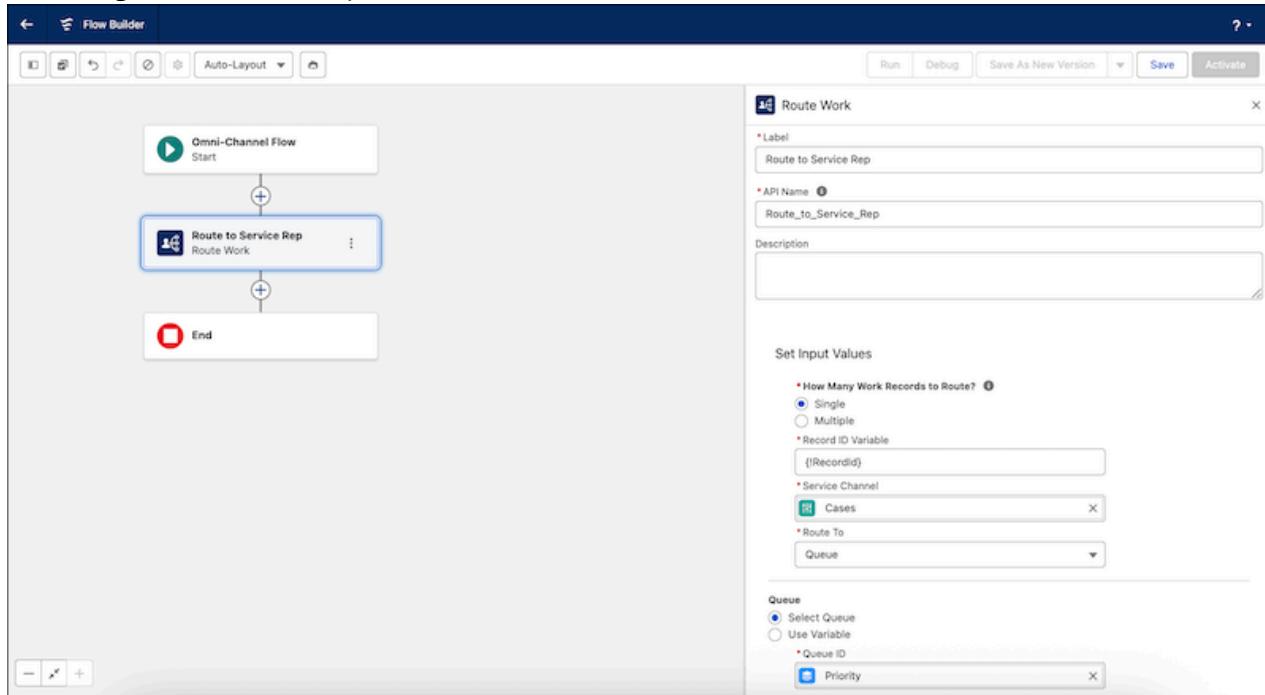
As an alternative to an Omni-Channel flow, you can simply set the Case Owner of your routing address to the context user for your agent listed under the Agent Details tab in Agents setup, or create a Case Assignment Rule to do the same. This is a quick way to get up and running, but it doesn't provide the same level of granular control that a flow does.

Configure the Escalation Topic

Use the Escalation topic to route work to a service rep when a customer is frustrated. This is the second

flow that you'll create in the setup process.

- Agentforce Service agents can tell when an end user is frustrated with an interaction, and can use the Escalation topic to transfer the inbound email to a service rep. [Learn more about the Escalation topic and how to configure it.](#)
- When a case is escalated, your outbound flow is triggered and changes the Case Owner from the AI service agent to a service rep.



- If you remove the Escalation topic or choose not to configure a routing flow for escalation, the escalation flow won't work.
- Agentforce Service agents connected to email don't use the escalation message defined for the agent. When an Agentforce Service agent connected to email escalates a conversation, no response is sent and the agent doesn't send any more automated emails.
- If using the same flow to route multiple types of records, don't use an input_record variable in your flow, as this variable must be linked only to one type of record and the flow will not work for other types of records.

Test Agentforce Service Agent on Email

If you're using an Omni-Channel flow for routing, test your flow with a new unused routing address. Then, switch to an active routing address when you're ready.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

✓ This article applies to: Agentforce Service agents

✗ This article doesn't apply to: Agentforce Employee agents

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If you set your routing address case owner as the Agentforce Service agent context user, test your configuration by sending an email to the routing address and reviewing the response.

The preview functionality in Agentforce Builder doesn't show email formatting. It's a messaging-based interface that shows messaging-style output.

The email channel does not use MessagingSession or any context variables derived from it. caseId (the record ID for the case being worked), emailAddress (the end-user's email address), and recipient (an object containing the contact record ID, available if the case is linked to a contact) context is passed at runtime. These are not mapped to variables in the agent. In your action input instructions, you can reference this info with plain text language like *The ID of the case*.

Monitor Emails Sent by an Agentforce Service Agent

To view and monitor emails sent by an AI agent, create a custom report or check the case feed for a specific case.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

✓ This article applies to: Agentforce Service agents

 This article doesn't apply to: Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

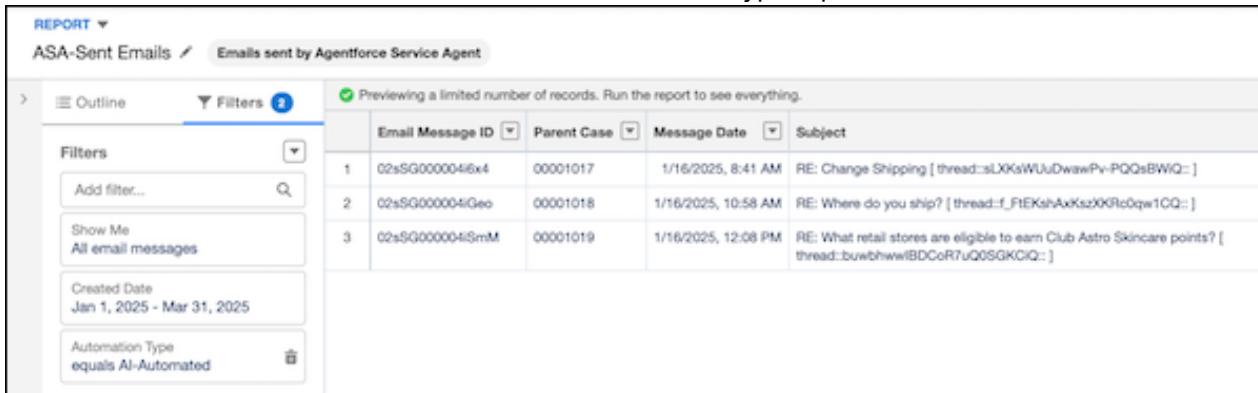
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To create Omni-Channel flows:	Customize Application

Monitor All Emails in a Report

Create a report that only shows emails sent by your Agentforce Service agent.

1. Create a custom report type to show email message records.
 - a. From Setup, enter *Report Types* in the Quick Find box and select **Report Types**.
 - b. Click **New Custom Report Type**.
 - c. Select **Email Messages** as the primary object.
 - d. Add a description and category, and select **Deployed** to make the report type available to others in your organization.
 - e. Save your report type.
2. On the report types page, open the action menu of your new report type and select **Start Report**.
3. In the Outline tab, select Email Message fields to add to your report, such as Parent Case, Message Date, and Subject.
4. In the Filters tab, add a filter for emails whose Automation Type equals AI-Automated.



Email Message ID	Parent Case	Message Date	Subject
02sSG000004l6x4	00001017	1/16/2025, 8:41 AM	RE: Change Shipping [thread::slXKsWUuDwawPv-PQGsBWQ::]
02sSG000004lGeo	00001018	1/16/2025, 10:58 AM	RE: Where do you ship? [thread::f_FIEKshAxKszXK9Rc0qw1CQ::]
02sSG000004lSmM	00001019	1/16/2025, 12:08 PM	RE: What retail stores are eligible to earn Club Astro Skincare points? [thread::buwbhwiwIBDCoR7uQ0SGKCjQ::]

5. Save and run your report.

Alternatively, to track cases owned by your Agentforce Service agent, create a report that shows all cases

whose Case owner is your AI agent's context user.

Monitor Emails for a Specific Case

The case feed shows all emails sent in relation to a case. Emails sent by your Agentforce Service agent in the feed include several visual cues—the AI diamond and the Agentforce icon—and list the sender as the Agentforce Service agent context user.

The screenshot shows the Salesforce Case Feed for a case titled "Change Shipping". The feed displays various activity types: Posts, Emails, Call Logs, Text Posts, and Status Changes. An email from "Agentforce Service Agent" is highlighted with an orange border. The email was sent 4 hours ago and contains the message: "Agentforce Email! Hi Jared, I see that your order (Order number: 1234) is already shipped and scheduled to ...". Below it, a message from "Jared" is shown, also 4 hours ago, stating: "Hi There, I recently placed an order, but I entered my address instead of my mom's address. Is there a way I c...". The interface includes standard Salesforce navigation and search tools.

Connect a Service Agent to Telephony in the Legacy Builder

Route voice conversations to your Agentforce Service agents. Learn how to create a telephony connection, configure voice mode settings, and route calls to your agent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions, and [Service Cloud Voice add-ons](#).

Roles of Agentforce Voice and Service Cloud Voice

Agentforce Voice is the conversational AI capability built into Agentforce. Agentforce Voice processes voice interactions, understanding the customer intent and generating spoken responses.

[Service Cloud Voice](#) integrates third-party telephony systems, such as Amazon Connect, Genesys, and CCaaS systems, with Salesforce. To use Agentforce Voice, at minimum, Service Cloud Voice must be turned on—a complete setup isn't required. For example, if you are using CCaaS, you just need to turn on Service Cloud Voice. Although, with a complete Service Cloud Voice setup, Agentforce Voice integrates seamlessly into your contact center, making it easy to handle scenarios such as agent escalation and context passing.

Agentforce Voice and Service Cloud Voice work together to transform your contact center from traditional, static telephony into an intelligent, conversational experience. Agentforce Voice and Service Cloud Voice let you provide 24/7 support with built-in agent transfer and escalation capabilities when your customers need them.

Before You Begin

- We recommend that you create a dedicated agent for handling voice conversations. See [Create a Voice-Enabled Service Agent in the Legacy Builder](#).
 - If you are a Service Cloud Voice customer and plan to integrate with Agentforce Voice, ensure that your [Service Cloud Voice contact center is fully configured](#).
 - If you are not a Service Cloud Voice customer, but plan to integrate with Agentforce Voice, you must first turn on [Service Cloud Voice](#) and [create a fallback queue](#) for the Omni-Channel flow that transfers inbound calls to an agent. You don't need to complete any additional Service Cloud Voice setup steps.
 - To set up Agentforce Voice, your Salesforce user account must be assigned:
 - The Standard User standard profile.
 - The Customize Application system permission.
 - Read access on Communication Channel Lines object.
 - Ask your Salesforce account executive to verify that your partner telephony (or partner CCaaS) provider is supported.
-  **Note** (For SIP only) If your telephony provider is supported, reach out to your provider to enable the SIP service.
- (For SIP only) Determine the SIP address in advance. Although the SIP address is not an actual phone number, the value must be in the E.164 phone number format. Later, you use this SIP address to [create the Messaging channel for routing incoming calls to a voice-enabled agent](#) and to [create the SIP trunk](#).
 - To grant the Omni-Channel flows access to update the VoiceCall records, assign the [Contact Center Admin permission set](#) to the user who creates the Omni-Channel flows.
 - To monitor agents in the Omni Supervisor, you must enable Enhanced Omni-Channel.

Watch this video for a demonstration of how to route voice conversations to an Agentforce Service agent.

Watch the video: <https://play.vidyard.com/7UJuTize5zUoSPooDJyN2V>

Here are the steps and information required to connect an agent voice and handle customer phone calls.

Add a Telephony Connection

Add a new Telephony connection to your agent.

Select the Voice For Your Agent

Select a voice that you want your agent to use when talking to your customers. Consider the type of voice that is most suitable for your agent's job or purpose.

Configure Call Routing and Call Escalation for the Agent

Configure an Omni-Channel flow to transfer inbound calls to the voice-enabled agent. Create an escalation Omni-Channel flow to disconnect the agent and, if supported by your telephony or CCaaS system, transfer the call to a rep. Add the activated escalation flow to the agent.

(For PSTN only) Procure a Phone Number for the Channel

To enable calls to be transferred to the Agentforce agent using PSTN, first procure a phone number. Later, you'll associate this phone number with the channel that's used to transfer calls to the agent.

Create the Channel for Agentforce Voice

Create a Messaging channel for incoming calls that need to be transferred to the Agentforce agent. In the channel, map the procured PSTN phone number or SIP address to the inbound Omni-Channel flow. When an incoming call is transferred using this number or address, Omni-Channel uses the Omni-Channel flow to transfer the call to the agent assigned to the channel.

Configure Telephony Vendor Settings for Call Routing and Escalation

If supported, configure your telephony system to create a VoiceCall record in Salesforce for every incoming call, and then transfer each call to the Agentforce agent using the procured phone number or SIP address. When needed, transfer the call to a human service rep.

Connecting Related Voice Calls

When an incoming call is transferred to an Agentforce agent or a human service rep, a separate voice call record can be created in Salesforce for that leg of the call. As a result, you might have multiple voice call records for conversation with a customer. To provide a single, comprehensive view and preserve the call context, connect these related voice call records. This connection enables more informed decisions, such as escalating the call to the appropriate rep based on all gathered information.

(For PSTN only) Record Voice Calls with Agents

To record the conversations between customers and Agentforce agents, turn on the recording. By default, the recording is turned off.

Add a Telephony Connection

Add a new Telephony connection to your agent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions,

and [Service Cloud Voice add-ons](#).

USER PERMISSIONS NEEDED

To build and manage Service Agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

[Customize Application](#)

1. From the Agentforce Agents Setup page, launch your agent in Agentforce Builder.
2. If not already enabled, turn on the new Connections panel experience on the Connections tab.



3. From the Connections tab, click **New**.
4. Select **Telephony** and click **Add to Agent**.
5. Review the recommendations for optimizing the agent for voice and click **Yes, Optimize for Voice** to add the telephony connection.

The telephony connection optimizes the agent for handling voice calls using your telephony solution.

See Also

[Video: Set Up a Voice-Enabled Agent in Agentforce](#)

Select the Voice For Your Agent

Select a voice that you want your agent to use when talking to your customers. Consider the type of voice that is most suitable for your agent's job or purpose.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions, and [Service Cloud Voice add-ons](#).

USER PERMISSIONS NEEDED

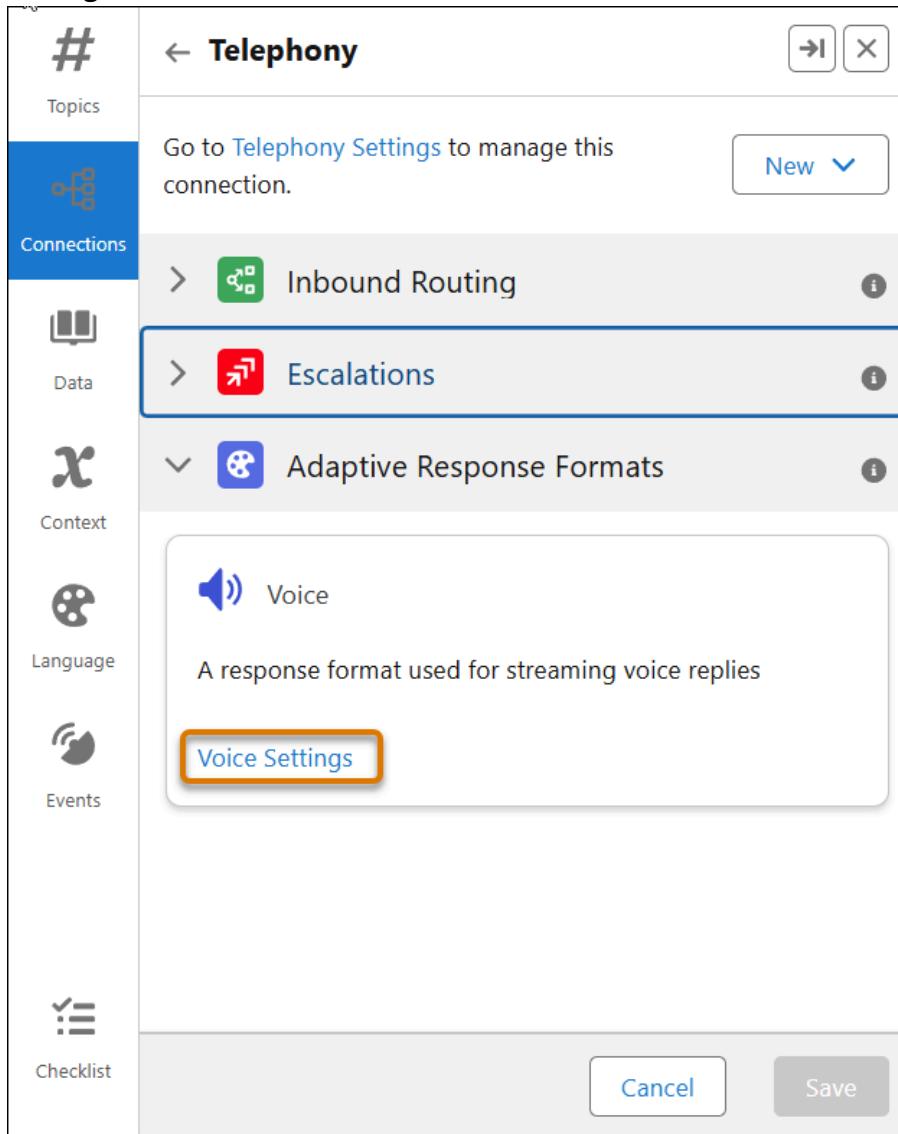
To build and manage Service Agents:

Manage Agentforce Service Agents AND Manage AI Agents

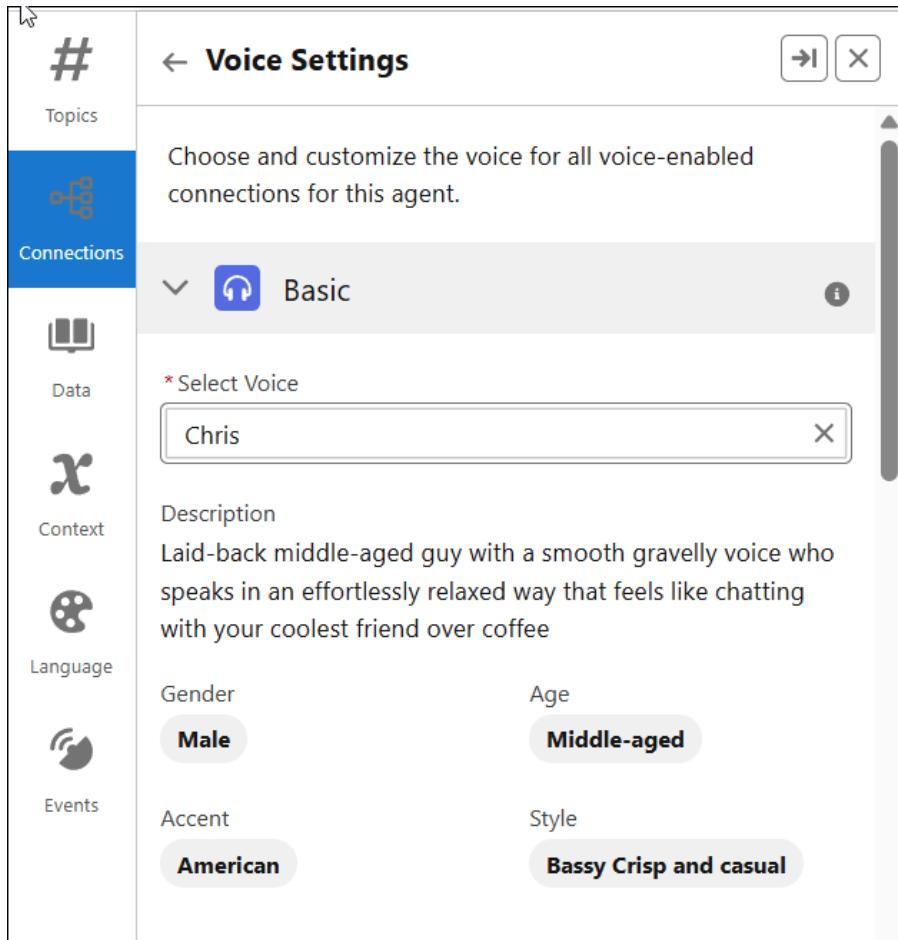
OR

Customize Application

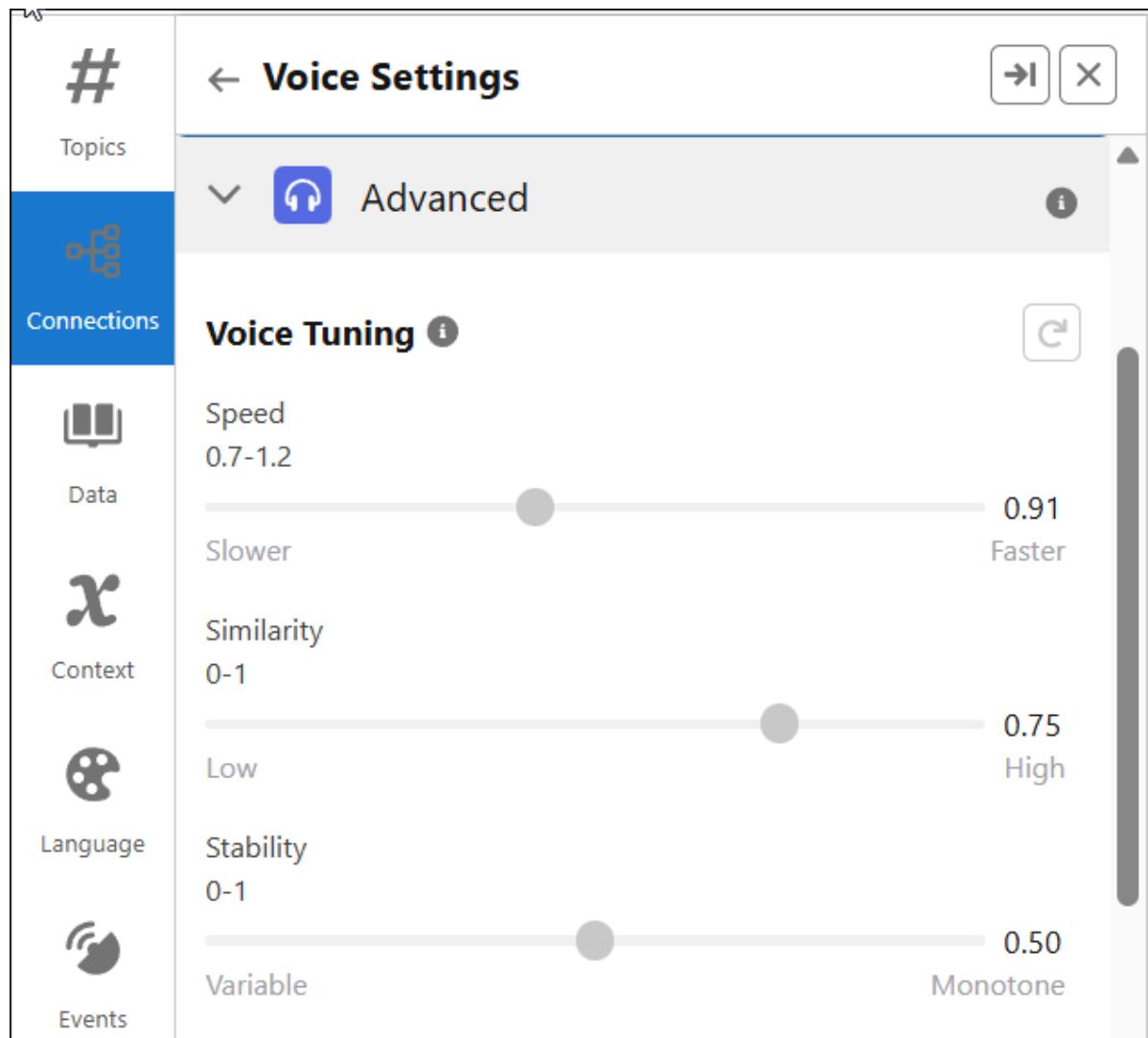
1. In Agentforce Builder, within the Connections tab, select the Telephony connection and click **Voice Settings**.



2. Expand **Basic** and select a voice from the list. Review the description and other characteristics such as gender, age, accent and style.



3. Expand **Advanced**. Advanced settings allow you to fine tune the voice to your preferences. Make sure to test the settings and consider your audience and content and adjust the settings if necessary.
 - Speed: Allows you to either speed up or slow down the pace of the generated speech.
 - Similarity: Controls how closely the generated speech matches the original voice you selected.
 - Stability: Determines how stable the voice is and the randomness between each generation. Lower values allow for a broader emotional range for the voice. High values make the speech closer to serious or monotone.



- Under Pronunciation Dictionary, add any words or phrases that are unique to your organization or use case and is likely to be mispronounced.
 - Word: Add the word or phrase.
 - Pronunciation: Specify the pronunciation for the word or phrase you entered.
 - Type: Select the type of pronunciation dictionary to use: The International Phonetic Alphabet (IPA) is a global system using unique characters, often from Latin and Greek, to represent speech sounds (e.g., "cat" is /kæt/). The Carnegie Mellon University (CMU) dictionary is an American English pronunciation dictionary using a simplified ASCII-based phoneme set (ARPA) for speech technology (e.g., "cat" is K AE T).
- Tip** Listen to the agent pronouncing the word or phrase in the voice preview to determine if the word or phrase required adding it to the pronunciation dictionary.
- Under the Key-term Prompting, enter single terms or phrases that are unique to your organization or might be difficult to translate to text. Key-term prompting improves the ability of the model to correctly recognize terms and phrases you specify. While the pronunciation dictionary provides the phonetic spellings or pronunciation guidance, key-term prompting helps the model recognize the terms and phrases and transcribe more accurately.
 - Enter single terms or phrases such as uncommon words, proper nouns, product names, and

industry-specific terms.

- Capitalize keywords as you want them to appear in transcripts.
- Limit to 100 keywords.

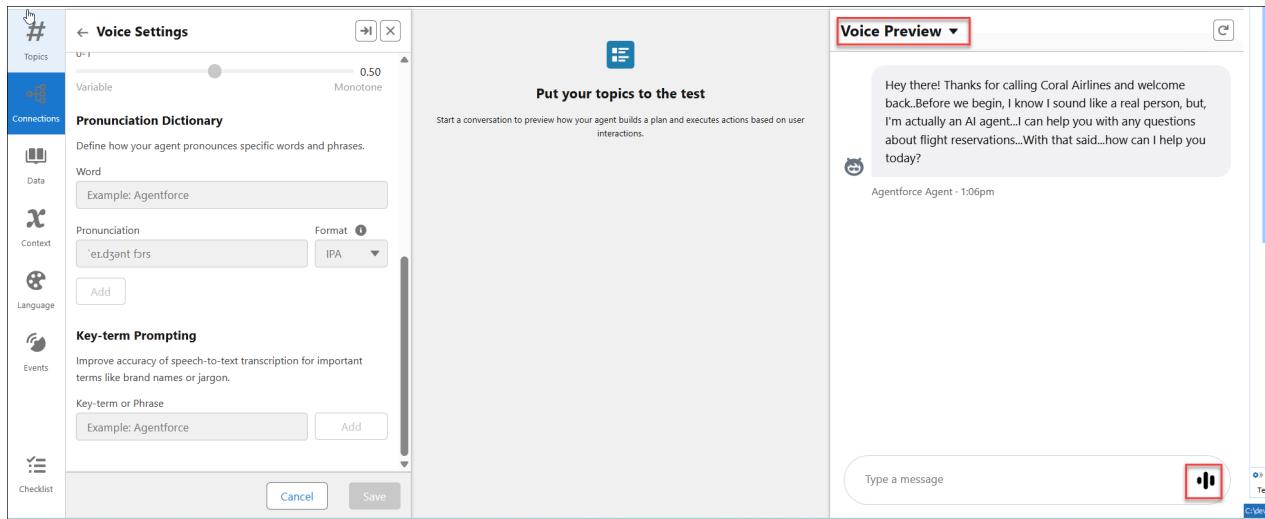
The following examples demonstrate how key-term prompting can significantly improve recognition accuracy and confidence scores for industry-specific terminology.

 **Note** The confidence scores below are illustrative examples showing typical improvement patterns. Actual results may vary based on audio quality, accent, and context.

Source	Confidence Score - Before	Confidence Score- After
account number	"word": "a count", "confidence": 0.82154321	"word": "account", "confidence": 0.97891234
representative	"word": "represent a tip", "confidence": 0.79043218	"word": "representative", "confidence": 0.98654321
billing department	"word": "building", "confidence": 0.81234567	"word": "billing", "confidence": 0.96789012
escalation	"word": "escalate shin", "confidence": 0.76543210	"word": "escalation", "confidence": 0.98123456
customer service	"word": "customer", "confidence": 0.84567890	"word": "customer", "confidence": 0.97234567
technical support	"word": "tech nil call", "confidence": 0.83456789	"word": "technical", "confidence": 0.98345678

The screenshot shows the 'Voice Settings' panel within the Einstein Generative AI Solution builder. On the left, a sidebar lists categories: Topics, Connections (selected), Data, Context, Language, Events, and Checklist. The main area displays 'Voice Settings' with a slider for 'Variable' ranging from 0.0 to 0.50, currently set at 0.50, with 'Monotone' as an option. Below this is the 'Pronunciation Dictionary' section, which allows defining how an agent pronounces specific words and phrases. An example entry for 'Agentforce' is shown with its IPA transcription ('eɪ.dʒənt fɔrs') and a dropdown menu for 'Format'. A large 'Add' button is available to add more entries. The next section, 'Key-term Prompting', aims to improve speech-to-text transcription accuracy for important terms like brand names or jargon. It includes a 'Key-term or Phrase' input field with an 'Example: Agentforce' placeholder and an 'Add' button. At the bottom right are 'Cancel' and 'Save' buttons.

6. Use the Voice Preview panel to test how your agent sounds. Save your settings.



See Also

[Video: Set Up a Voice-Enabled Agent in Agentforce](#)

Configure Call Routing and Call Escalation for the Agent

Configure an Omni-Channel flow to transfer inbound calls to the voice-enabled agent. Create an escalation Omni-Channel flow to disconnect the agent and, if supported by your telephony or CCaaS system, transfer the call to a rep. Add the activated escalation flow to the agent.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To open, edit, or create a flow in Flow Builder:	Manage Flow
To grant the Omni-Channel flow access to update the voice call records:	Contact Center Admin permission set OR Contact Center Admin (Partner Telephony) permission set
To view and edit a connection in Agentforce Builder:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application

See Also

[Video: Set Up a Voice-Enabled Agent in Agentforce](#)

Configure Inbound Call Transfers to the Voice-Enabled Agent

Create an Omni-Channel flow in Salesforce to transfer incoming calls to the agent. If needed, you can transfer calls to different agents.

1. [Create a routing configuration](#). Routing configuration determines how the calls are routed to the Agentforce Service agent. In the Routing Configuration window, enter these values. Use default values for all other settings.

- Routing Priority: 1
- Routing Model: External Routing
- Capacity Type: Inherited
- Percentage of Capacity: 100%

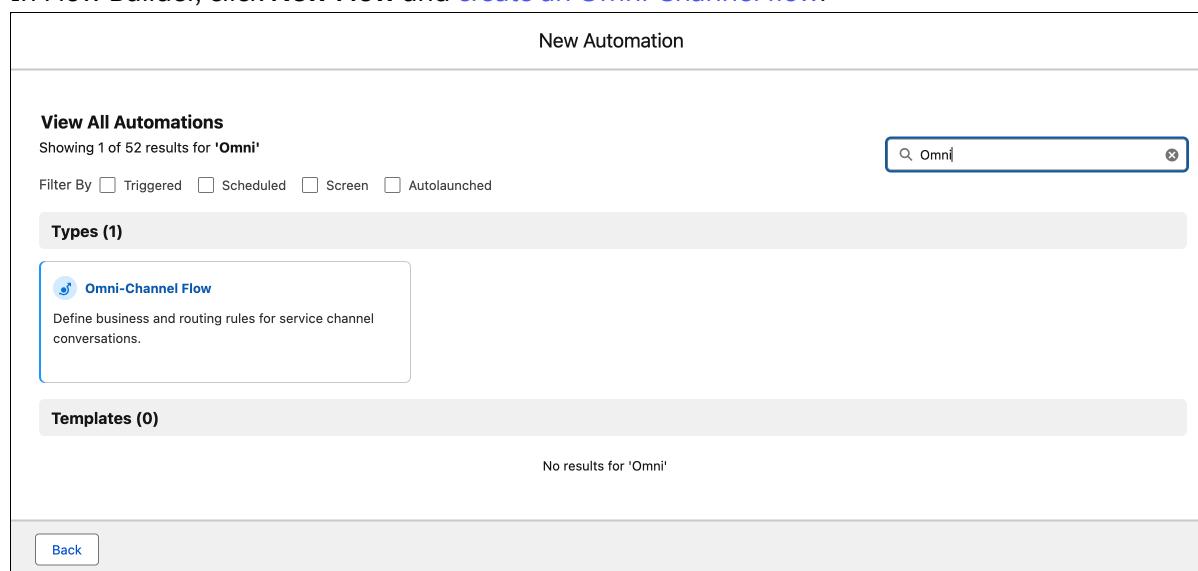


2. [Create a queue](#). This queue is used as the fallback queue for the inbound call transfers. Enter these values in the Queues Setup window. Use default values for all other settings.

- Routing Configuration: Select the routing configuration that you created in Step 1.
- Supported Objects: Voice Call
- Queue Members: None



3. In Flow Builder, click **New Flow** and [create an Omni-Channel flow](#).



4. Create an input variable that stores the Voice call record ID. Name the variable `recordId`, set the data type to `Text`, select **Available for input**, and then click **Done**.

The telephony system provides the Voice call record ID as input to this Omni-Channel flow. For details, see [Create the recordId](#).

New Resource

* Resource Type
Variable

* API Name ⓘ
recordId

Description

* Data Type
Text Allow multiple values (collection) ⓘ

Default Value
Enter value or search resources...

Availability Outside the Flow
 Available for input
 Available for output

5. Drag the Route Work action onto the canvas.

 **Tip** You can add multiple Route Work actions to transfer work items to different Agentforce agents.

6. Give the action a label and API name and, optionally, a description.
 7. Under Set Input Values, in the How Many Work Records to Route field, select **Single**.
 8. In the Record ID Variable field, select the recordId variable.
 9. In the Service Channel field, select **Phone**.
 10. In the Route To field, select **Agentforce Service Agent**.
 11. In the Agentforce Service Agent field, select the name of the voice-enabled agent.
If your agent doesn't appear in the list, make sure your agent is activated. See [Activate or Deactivate Your Agent](#).
 12. In the Fallback Queue field, choose **Select Queue**, and then select the queue you created earlier that supports the VoiceCall object.
-  **Note** If the queue doesn't support the VoiceCall object, the routing fails. Although the Fallback Queue field is required, it isn't used to transfer the call.

New Route Work

* Label: Route Calls to Voice-Enabled Agent * API Name: Route_Calls_to_Voice_Enabled_Agent

Description:

Set Input Values

- * How Many Work Records to Route? Single
- * Record ID Variable: {!recordId}
- * Service Channel: Phone
- * Route To: Agentforce Service Agent
- * Agentforce Service Agent: Agentforce Service Agent

Fallback Queue

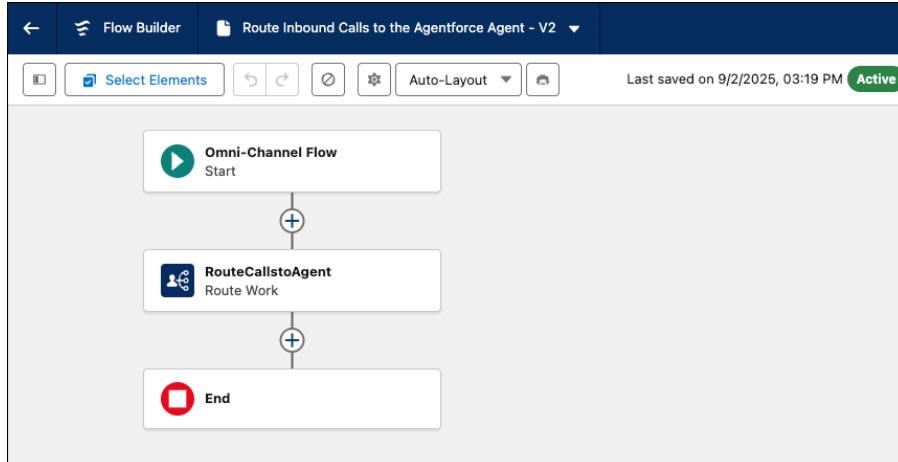
- Select Queue: SCV Basic Queue

Set Additional Input Values

Cancel Done

13. Click **Done**.
14. Verify that all actions in the flow are connected.
15. Save and activate the Omni-Channel flow.

Here's a sample flow that transfers the inbound call to an agent.



16. From the Agentforce Agents Setup page, launch your agent in Agentforce Builder.
17. On the Connections tab, open the connection for the agent.
18. Verify that the inbound flow is added.

The screenshot shows the Agentforce Builder interface. The top navigation bar includes 'Agentforce Builder', 'Agentforce Service Agent', 'Version 1 (Active)', 'Settings', 'Help', 'Batch Test', and 'Deactivate'. The left sidebar has tabs for 'Topics', 'Connections' (selected), 'Data', 'Context', 'Language', and 'Events'. The main content area is titled 'Telephony' and contains sections for 'Inbound Routing' (highlighted with an orange box) and 'Escalations'. The 'Inbound Routing' section shows 'Route Inbound Calls to Agent' with 'Routing Type: Omni-Flow'. The 'Escalations' section includes fields for 'Escalation Flow' and 'Escalation Message'. To the right, there's a sidebar with the title 'Lightning Experience' and a section titled 'Put your topics to the test' with instructions to start a conversation to preview how the agent builds a plan and executes actions based on user interactions. It features a cartoon robot icon.

Later, you [configure inbound call transfers in the telephony system](#).

Create the Escalation Omni-Channel Flow

If an agent needs help assisting the customer, Agentforce triggers an escalation flow. Create the escalation flow to disconnect the agent and transfer the call to a rep. After Salesforce disconnects from the call, call control returns to the telephony system.

1. In Flow Builder, click **New Flow** and create an Omni-Channel flow.
2. Create an input variable that stores the Voice call record ID. Name the variable `recordId`, set the data type to `Text`, select **Available for input**, and then click **Done**.

The telephony system provides the Voice call record ID as input to this Omni-Channel flow.

New Resource

* Resource Type
Variable

* API Name ⓘ
recordId

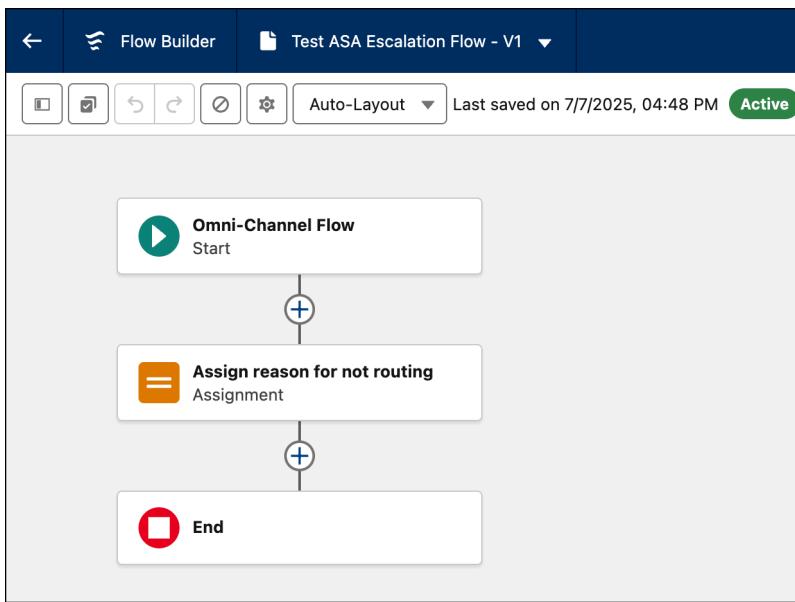
Description

* Data Type
Text Allow multiple values (collection) ⓘ

Default Value
Enter value or search resources...

Availability Outside the Flow
 Available for input
 Available for output

3. Add at least one action to the flow.
You can't save an empty flow.
4. Click **Done**.
5. Verify that all actions in the flow are connected.
6. Save and activate the Omni-Channel flow.

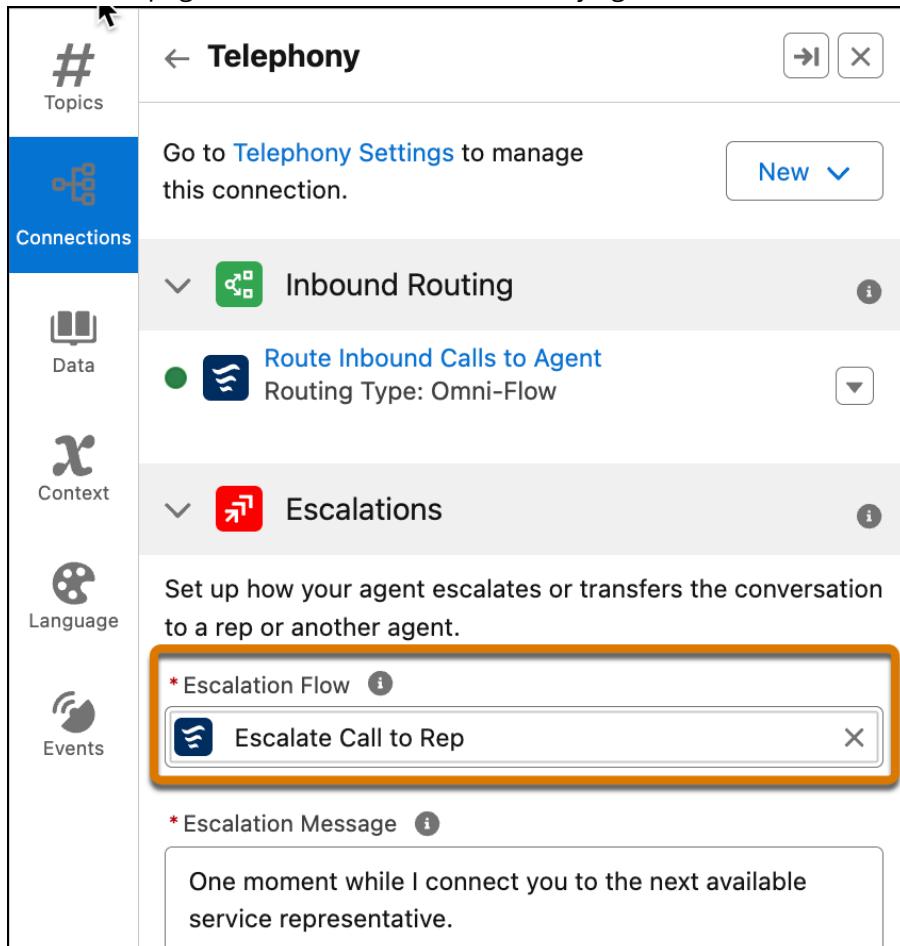


Agents can use an outbound Omni-Channel flow to transfer the conversation to a queue, rep, or another destination you specify. For details, see [Transfer Conversations from an Agent with an Omni-Channel Flow](#).

Add the Escalation Flow to the Agent

To know which flow to run during an escalation, add the activated escalation flow to the agent.

1. From Setup, in the Quick Find box, enter Agentforce Agents, then select **Agentforce Agents**.
2. To edit the agent, click the dropdown to the right of the agent name, and select **Open in Builder**.
3. In Agentforce Builder, click the Connections tab.
4. Open the Telephony connection that you created in [Add a Telephony Connection](#).
5. In the Escalation Flow field in the Escalations section, select the escalation flow that you just created. If you can't select a flow, ensure that the agent is deactivated. If your flow doesn't appear in the list, refresh the page, activate the flow, and then try again.



6. In the Escalation Message field, if needed, modify the message that the agent says to the customer when the call is transferred to a rep.
7. Save the connection.
8. Click **Activate**.

(For PSTN only) Procure a Phone Number for the Channel

To enable calls to be transferred to the Agentforce agent using PSTN, first procure a phone number. Later, you'll associate this phone number with the channel that's used to transfer calls to the agent.

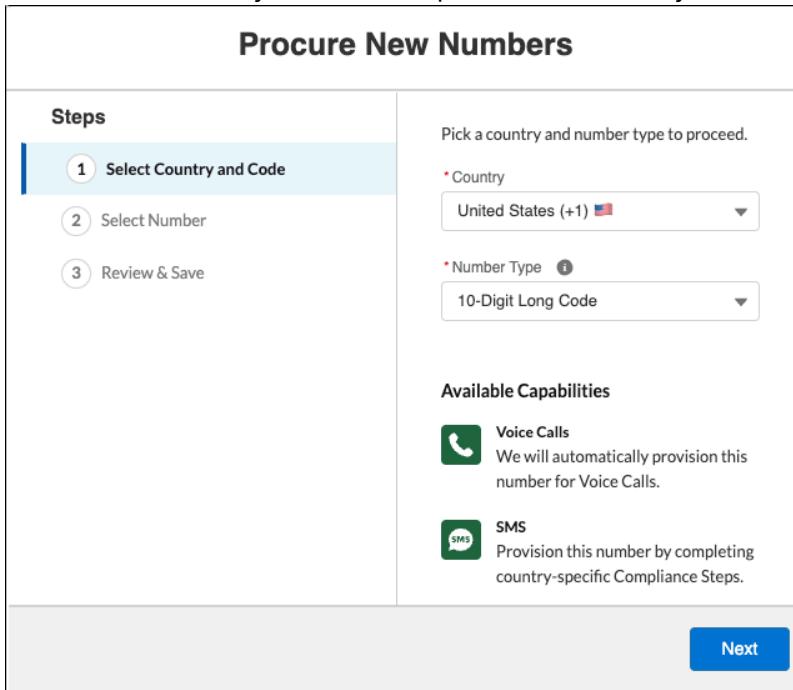
REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions, and **Service Cloud Voice add-ons**.

-  **Note** You can procure a local phone number from Canada or United States. For optimal call latency, we recommend that you enable Agentforce Voice in an org closest to one of these regions. This procured phone number is not a public number for customers to call directly and doesn't support SMS capabilities.

1. From Setup, in the Quick Find box, enter *Agentforce Voice*, then select **Agentforce Voice Setup**.
2. In the Voice Channels with Agents section of the Agentforce Voice Setup page, click **New Number**.
3. In the Select Country and Code step, select the country and number type.



The screenshot shows the 'Procure New Numbers' step of the Agentforce Voice Setup wizard. On the left, a vertical navigation bar lists three steps: 1. Select Country and Code (which is currently selected), 2. Select Number, and 3. Review & Save. The main panel has two sections: 'Steps' and 'Available Capabilities'. The 'Steps' section contains fields for 'Country' (set to 'United States (+1)') and 'Number Type' (set to '10-Digit Long Code'). The 'Available Capabilities' section shows two options: 'Voice Calls' (with a note that it will be automatically provisioned) and 'SMS' (with a note that provisioning requires completing country-specific Compliance Steps). A blue 'Next' button is located at the bottom right of the panel.

4. Click **Next**.
5. In the Select Number step, enter the 3-digit area code and click **Search**.
6. Select a phone number.
7. Click **Next**.
8. In the Review & Save step, review the phone number details and click **Finish**.
The modal automatically closes.
9. Refresh the page to see the phone number in the Phone Numbers tab of the Voice Channels with Agents section.
A newly procured phone number can take a couple of minutes to appear in this tab.

The Phone Numbers tab in the Agentforce Voice Setup page shows the phone numbers with their statuses.

The screenshot shows the 'Agentforce Voice Setup' page under the 'SETUP' tab. The 'PSTN' tab is selected. The page is divided into two main sections: 'Setup Steps' and 'Voice Channels with Agents'.

Setup Steps:

- Create a Voice-Enabled Agent**: Create an agent that handles incoming calls from customers. [Learn More](#). Action: [Agent Builder](#).
- Configure Call Routing and Call Escalation for the Agent**: Create an Omni-Channel flow that routes incoming calls to the agent and another flow that can escalate a call to a rep. [Learn More](#). Action: [Flow Builder](#).
- Procure a Phone Number for the Channel**: Omni-Channel uses this number to route inbound calls to the agent. To get a number, click New Number. [Learn More](#).
- Create the Messaging Channel for Agentforce Voice**: To route inbound calls to the agent using the procured phone number, create a Messaging channel that maps the phone number to the Omni-Channel flow. [Learn More](#). Action: [Add](#).
- Configure Telephony Vendor Settings for Call Routing and Escalation**: Route incoming calls to the procured number and route escalated calls from the agent to a rep. [Learn More](#).
- Connect Related Voice Calls**: When a call is routed to the agent, another Voice call record is created to track the agent interaction. To relate the original and new call records and preserve the call context, enable this option. [Learn More](#). Status: Disabled.
- Record Voice Calls with Agents**: Record voice calls between customers and agents. [Learn More](#). Status: Disabled.

Voice Channels with Agents:

Buttons: [C](#), [New Number](#), [New Channel](#).

Channels	Phone Numbers		
Number	Status	Modified By	Modified On
+1	Live	Yam sdb6	7/28/2025, 10:46 AM
+	Live	Yam sdb6	7/28/2025, 11:36 PM
+	Cancelled	Admin User	9/3/2025, 09:38 PM
+	Live	Admin User	9/3/2025, 09:39 PM
+	Live	Yam sdb6	9/24/2025, 08:24 AM

See Also

[Video: Set Up a Voice-Enabled Agent in Agentforce](#)

Create the Channel for Agentforce Voice

Create a Messaging channel for incoming calls that need to be transferred to the Agentforce agent. In the channel, map the procured PSTN phone number or SIP address to the inbound Omni-Channel flow. When an incoming call is transferred using this number or address, Omni-Channel uses the Omni-Channel flow to transfer the call to the agent assigned to the channel.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions, and [Service Cloud Voice add-ons](#).

- From Setup, in the Quick Find box, enter *Agentforce Voice*, then select **Agentforce Voice Setup**.
- In the Voice Channels with Agents section of the Agentforce Voice Setup page, click **New Channel**.

Create a channel that routes calls to the agent.

Enter a channel and developer name for the channel. Select the procured phone number or SIP address. Then select the associated Omni-Channel flow that routes calls to the agent.

* Channel Name
Agentforce Voice with SIP

* Developer Name
agentforce_voice_with_sip

What communication protocol do you want to use for calls in this channel?

Use a phone number
 Use a SIP address

* SIP Address (E.164)
+15551234567

Call Routing

Select the Omni-Channel flow that routes incoming calls to the agent.

* Omni-Channel Flow
ASAVoiceRoute

Cancel Save

3. Enter the name and developer name of the channel.
 4. For PSTN, select **Use a phone number** and then select the phone number for the channel.
-  **Note** Only phone numbers with a Live status appear in the dropdown. Each phone number can be associated with only one channel.
5. For SIP, select **Use a SIP address** and then enter the SIP address that routes incoming calls to the agent. Although the SIP address is not an actual phone number, the value must be in the E.164 phone number format.
 6. Under Call Routing, select the Omni-Channel flow that routes inbound calls to the agent. You created this flow in [Configure Inbound Call Transfers to the Voice-Enabled Agent](#). Don't select the escalation flow.
 7. Click **Save**.
- The Channels tab in the Agentforce Voice Setup page shows the channels that are added. A newly added channel can take a couple of minutes to appear in this tab.

Voice Channels with Agents

Channels	Phone Numbers			
Agentforce Voice with SIP	+15551234567	SIP Voice	ASAVoiceRoute	1/29/2026, 10:46 AM
Agentforce Voice with PSTN	+14153479403	PSTN Voice	SCVASEscalation	1/29/2026, 10:46 AM

8. In the Channels tab, click the channel name.

The screenshot shows the 'Agentforce Voice with SIP' setup screen. At the top, there's a 'MESSAGING SETTINGS' section with fields for Channel Name (Agentforce Voice with SIP), Type (Sip Voice), Messaging Platform Key (+15551234567), Channel Address Identifier (bce10e7d-86c3-4d11-8169-1af88ecb954a), Created Date (1/29/2026, 10:42 AM), Developer Name (agentforce_channel_for_sip), Messaging Channel ID (0MjSG000000FFBd0AO), Platform Type (Enhanced), and Modified On (1/29/2026, 10:46 AM). Below this is an 'Edit' button. The next section is 'OMNI-CHANNEL ROUTING' with a single field for Flow Definition (ASAVoiceRoute), also with an 'Edit' button.

- If you aren't a Service Cloud Voice customer, edit the channel and enter the public key. If you don't enter the public key, Omni-Channel will not route the calls to the voice-enabled agent.

To learn how to generate a token, which includes a private and public key pair, see [Generate a Self-Signed Certificate with OpenSSL](#).

Note If you aren't a Service Cloud Voice customer, when you construct a JSON claims set for the JWT, exclude the `sub` parameter.

If you are a Service Cloud Voice customer, ignore this step. JWT authentication is already set up if you are using Service Cloud Voice with a supported telephony provider.

- Click **Activate**.

After you create an agent, configure calls to be transferred to the agent, and configure calls with an agent to be escalated to a rep, it's time to [activate your agent](#).

Note If you call the procured phone number when the agent is deactivated, the agent doesn't pick up the call. You just hear music.

See Also

[Video: Set Up a Voice-Enabled Agent in Agentforce](#)

Configure Telephony Vendor Settings for Call Routing and Escalation

If supported, configure your telephony system to create a VoiceCall record in Salesforce for every incoming call, and then transfer each call to the Agentforce agent using the procured phone number or SIP address. When needed, transfer the call to a human service rep.

Configure SIP Trunking in Your Partner Telephony System

Before you can configure your telephony system to transfer and escalate calls via SIP, connect your telephony system to Salesforce. In addition to configuring logic to manage traffic and routing, connecting the telephony system to Salesforce also involves creating an encrypted SIP trunk to support user-to-user information exchange.

Set these attributes for your SIP trunk.

- Set the Salesforce SBC endpoint, using a [Salesforce SBC FQDN](#) and port.
- Set the protocol to TLS.
- Set the media codecs to audio/PCMU and audio/PCMA.
- Set the User to User Information (UUI) header before transferring the calls.
- Set the UUI encoding format to Hex.
- Grant SIP access to IP addresses. Set the allow and deny lists for the transferred calls to Salesforce.

Sample SIP Trunking Configuration in Genesys

To illustrate how to configure SIP trunking in a partner telephony system, this section covers the tasks using Genesys.

Add a Site

Add a site that defines which SIP trunk picks up incoming calls. For the properties not mentioned, keep the default values.

1. Log in to [Genesys Cloud](#).
2. Click the menu and select **Digital and Telephony | Telephony | Sites**.
3. In the Site page, add a new site.
4. In the Name field, enter a name for the site. For example, enter *Salesforce*.
5. In the Location field, select **Default PCV Location**.
6. In the Media Regions field, select the region nearest to your site. For example, if your Genesys account is in the US West, select **Americas (US West)**.
7. Save the site.

Create a Number Plan

To transfer calls using a SIP trunk, first create a number plan, assign the SIP address to it, and then select the classification for the SIP addresses in the number plan. The number plan determines which SIP trunk to route to. For the properties not mentioned, keep the default values.

Later, you'll configure the SIP trunk.

1. In the Site page, click the Number Plans tab.
2. Click **New Number Plan**.
3. In the Number Plan Name field, enter the name of the plan.
4. In the Match Type field, select an option. For example, select **E.164 Number List**.
5. In the Numbers field, enter the start and end numbers for the range of SIP addresses. If you have only one SIP address, enter the same number for both.
Each number must be in the E.164 format.
6. To route incoming calls to the SIP trunk that you will create, in the Classification field, create a classification. To create it, enter the name and click **+**.
7. Save the number plan.

The screenshot shows the 'Site' configuration page with the 'Number Plans' tab selected. On the left, there's a sidebar with various number plan categories. The main area contains fields for defining a new number plan, including its name, match type, and a list of numbers. There are also fields for specifying start and end numbers and a classification. At the bottom, there are 'Save Number Plans' and 'Cancel' buttons.

Create a SIP Trunk

Create the SIP trunk. To route incoming calls to the SIP trunk that you created, use the classification that you assigned to the number plan. For the properties not mentioned, keep the default values.

1. In the Digital and Telephony menu, click **Trunks**.
2. In the External Trunks page, click **Create New**.
3. In the Name field, enter a name for the trunk.
4. In the Trunk Type field, select **Generic BYOC Carrier**.
5. In the Protocol field, select **TLS**.
6. In the Termination Identifier field, enter a unique ID.
7. In the From Site field, choose the site that you created in the previous step.
8. To allow Genesys to call Salesforce, in the SIP Servers and Proxies field, add the Salesforce SBC endpoint.
 - a. Enter the Salesforce SBC fully qualified domain name (FQDN) as the SIP Server host name and **5061** as the port, then click **+**.
For a list of Salesforce SBC FQDNs, see [Agentforce Voice with SIP - Regional Availability and CCaaS Partner Support](#).
 - b. Choose the SBC FQDN for your telephony provider and region.
9. Under the SIP Access Control section, in the Allow the Following Addresses field, specify the IP address to allow SIP messages from the Salesforce SBC. To get the IP address, perform a lookup against the Salesforce fully qualified domain name.

- a. For Windows, open the command prompt and type `nslookup SBCFQDN`.
- b. For Mac or Linux, open the Terminal and type `dig SBCFQDN`.
10. Under the Identity section, disable **Address Omit + Prefix**.
11. Under the Media section, in the Preferred Codec List field, add the supported Salesforce codecs: **audio/PCMU** and **audio/PCMA** and turn on recording for Genesys.
12. Under the Protocol section, enable **Conversation Headers**, enable **UUI Passthrough**, set Type to **User-to-User**, and set Encoding Format to **Hex**.
13. Save the trunk.

The screenshot shows the Cisco Call Home configuration interface. The left sidebar has a blue header 'Trunks' and a list of other configuration categories like Message, Outbound, Telephony, Topology, Metrics, and Interaction Assets. The main area is titled 'Trunks' and contains several configuration sections:

- Conversation Headers**: A section with an 'Enabled' toggle switch (set to Enabled) and a note about inserting a custom conversation header ('x-inin-cnv') with a UUID value into SIP messages.
- From Header Hostname**: A section where the 'Automatically generate from Edge Network Interface' option is selected.
- Routing Address**: A dropdown menu set to 'Request-URI' with a note explaining it's used for routing decisions.
- Diversion Method**: A dropdown menu set to 'None' with a note about delivering diversion information to the remote end.
- Asserted Identity Header**: A dropdown menu set to 'P-Asserted-Identity' with a note about delivering asserted identity information to the remote end.
- Max Diversion Entries**: An input field set to '4' with a note about the maximum number of diversion entries.
- User to User Information (UUI)**: A section with an 'UUI Passthrough' toggle switch (set to Enabled) and a note about dynamic UUI settings for call flows or agent scripts.
- Type**: A dropdown menu set to 'User-to-User' with a note about selecting the User To User header type.
- Encoding Format**: A dropdown menu set to 'Hex' with a note about setting the encoding format for dynamically set UUI.

Create an Outbound Route

To route calls to the external SIP trunk based on the call's classification, create an outbound route. The outbound route maps the number plan to a specific trunk. In the site that you created, add an outbound route for the SIP trunk that you created, select the trunk, and select the applicable classification. For the properties not mentioned, keep the default values.

1. In the Outbound Routes tab of the site that you created, click **New Outbound Route**.
2. Enter a name for the outbound route.
3. In the Select External Trunks field, select the trunk that you created.
4. In the Classification field, replace any existing classifications with the one that you created for the number plan.
5. Save the outbound route.

Site

General Number Plans Outbound Routes Site Links Simulate Call

Outbound Routes

Route an outbound call to external trunks based on the call's number plan classification.

+ New Outbound Route Default Outbound Route

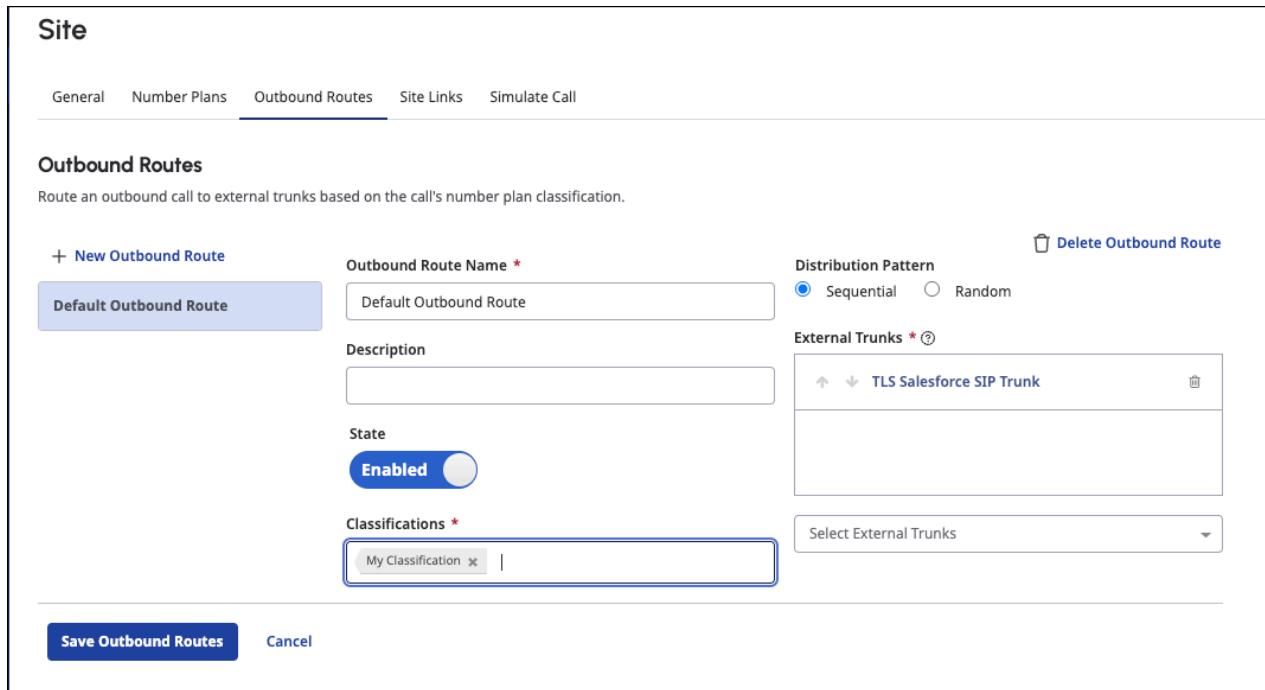
Outbound Route Name * Default Outbound Route Distribution Pattern Sequential Random

Description External Trunks * TLS Salesforce SIP Trunk

State Enabled

Classifications * My Classification Select External Trunks

Save Outbound Routes Cancel



(Optional) Test a Call

Optionally, verify that the trunk handles incoming calls correctly.

1. In the Simulate Call tab of the site that you created, enter the SIP address that you added for the number plan.
2. Click **Simulate Call**. Review the status to verify that the call went through successfully.
3. If it fails, review the error message to determine the cause.

The screenshot shows the 'Site' section of the Salesforce interface. The 'Simulate Call' tab is selected. A message states: 'Simulate call will use settings from the "General", "Number Plans", and "Outbound Routes" tabs. You do not need to save before simulating a call. This allows you to test before applying the changes.' Below this, a 'Phone Number or Address' field contains '+55 55 5123-4567' and a 'Simulate Call' button is visible. A green checkmark icon followed by the word 'Success' is displayed. A detailed list of call parameters is shown, each with a green checkmark: Calling Address (tel:+555551234567), Site's Media Regions (Americas (US West)), Number Plan (My Test Number Plan), Classification (My Classification), Outbound Route (Default Outbound Route), and External Trunks. A specific trunk entry for 'TLS Salesforce SIP Prod-13 Trunk' is expanded, showing it is operational and assigned to the Americas (US West) media region. A 'View Log' button is at the bottom.

Configure Inbound Call Transfers in the Telephony System

If supported, configure your telephony system to create the Initial voice call record in Salesforce for every incoming call, transfer the call to the agent, and, when needed, escalate the call to a human service rep.

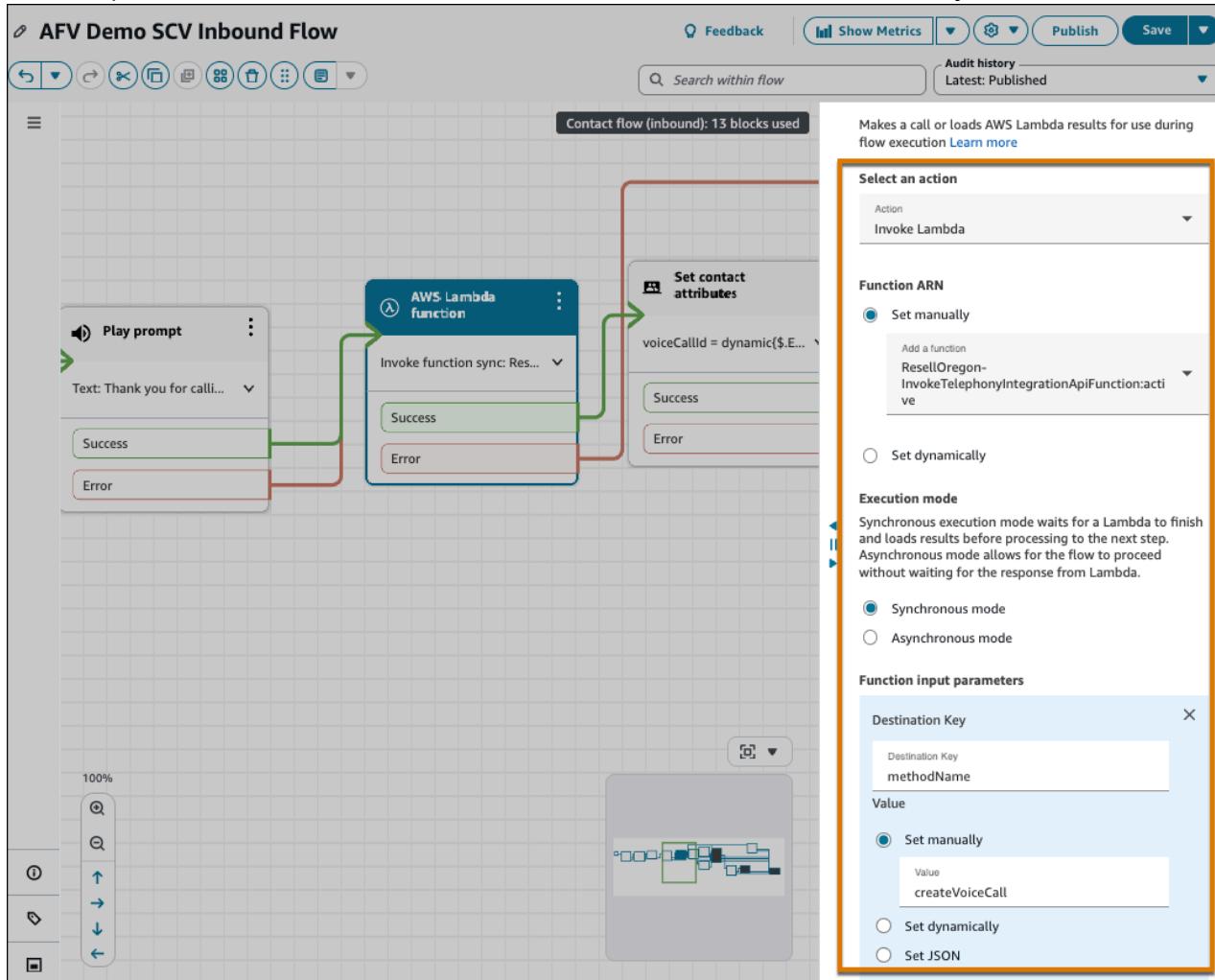
Configure Inbound Call Transfers Using PSTN

To illustrate how to configure inbound call transfers that happen via PSTN, this topic describes how to accomplish these tasks using Service Cloud Voice with Amazon Connect.

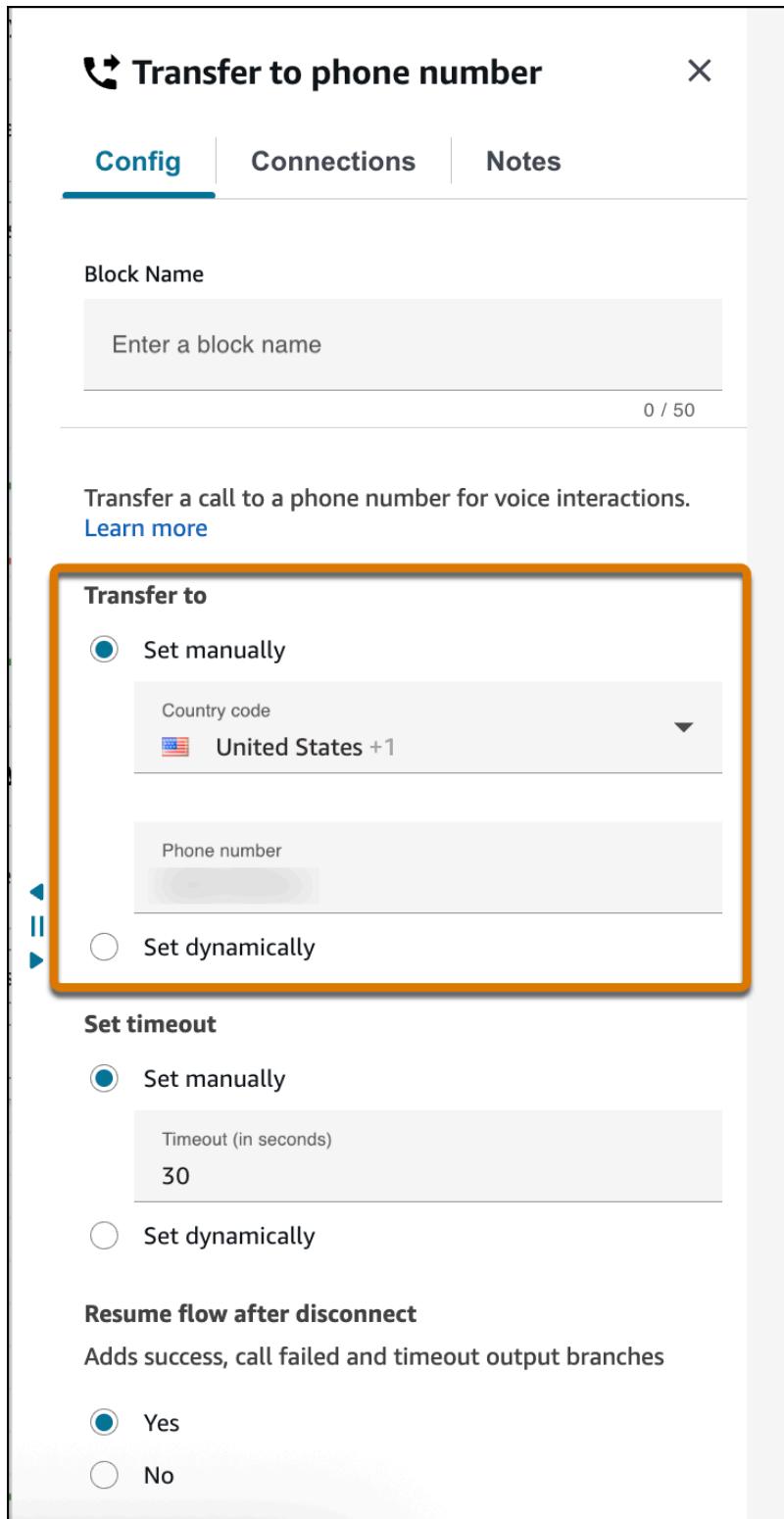
Tip If [Service Cloud Voice](#) or [Bring Your Own Channel for CCaaS](#) is completely set up, use the `createVoiceCall` method in the Amazon Connect Lambda function or the [createVoiceCall REST API](#) to create a `VoiceCall` record.

1. In Amazon Connect, create an Amazon Connect inbound flow. To quickly create an inbound flow, make a copy of the Sample SCV Inbound Flow.
An inbound flow handles incoming calls to your organization's Amazon Connect instance and routes the calls to their correct destination, such as a rep, a queue, or even an Agentforce agent. For information about how Service Cloud Voice uses these flows and to see sample flows, see [Amazon Connect Flows](#) and [Sample Flows for Service Cloud Voice](#).
2. To create a `VoiceCall` record in Salesforce, add an AWS Lambda Function block to the flow and call the `createVoiceCall` method.

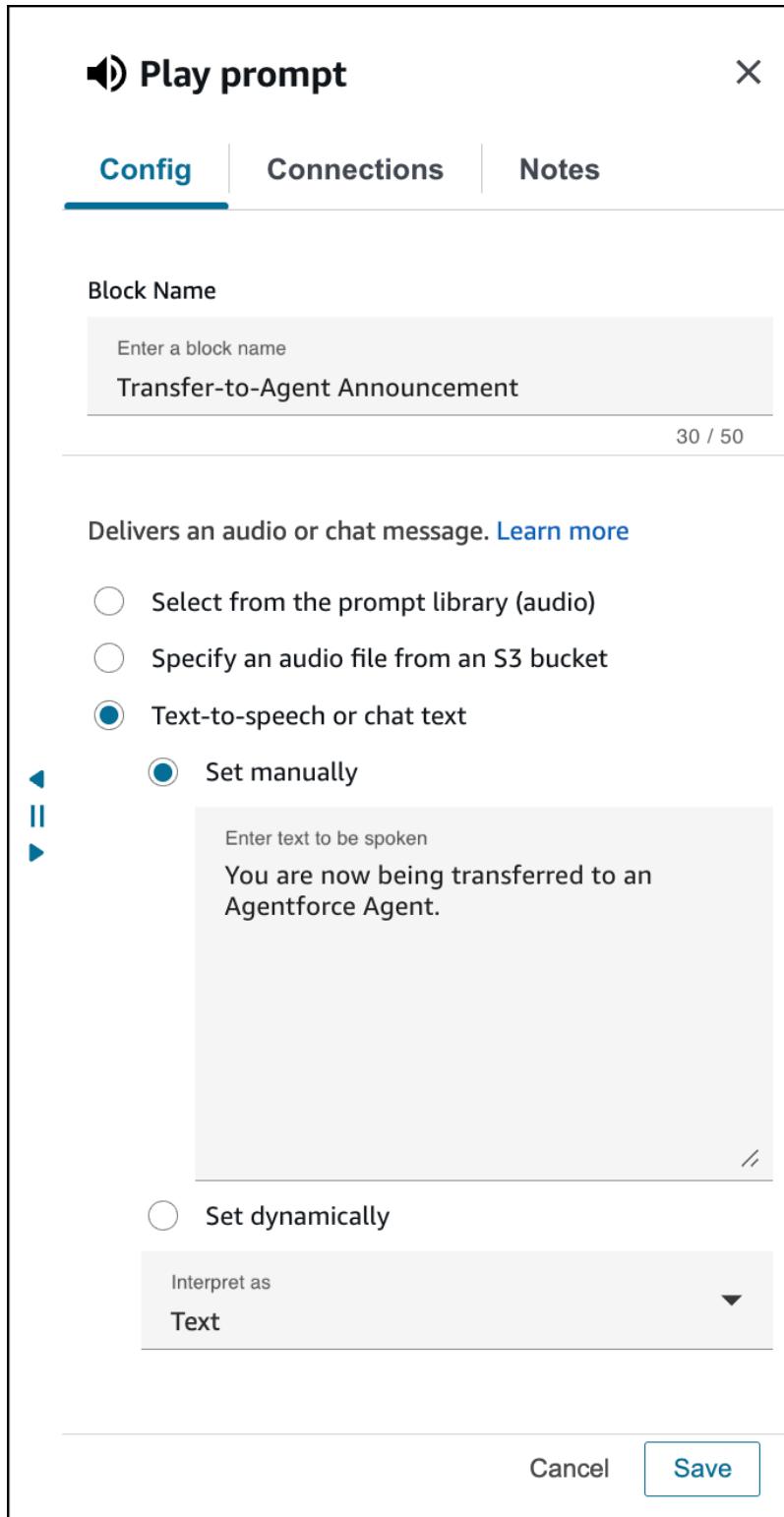
The Sample SCV Inbound Flow contains the AWS Lambda Function block already.



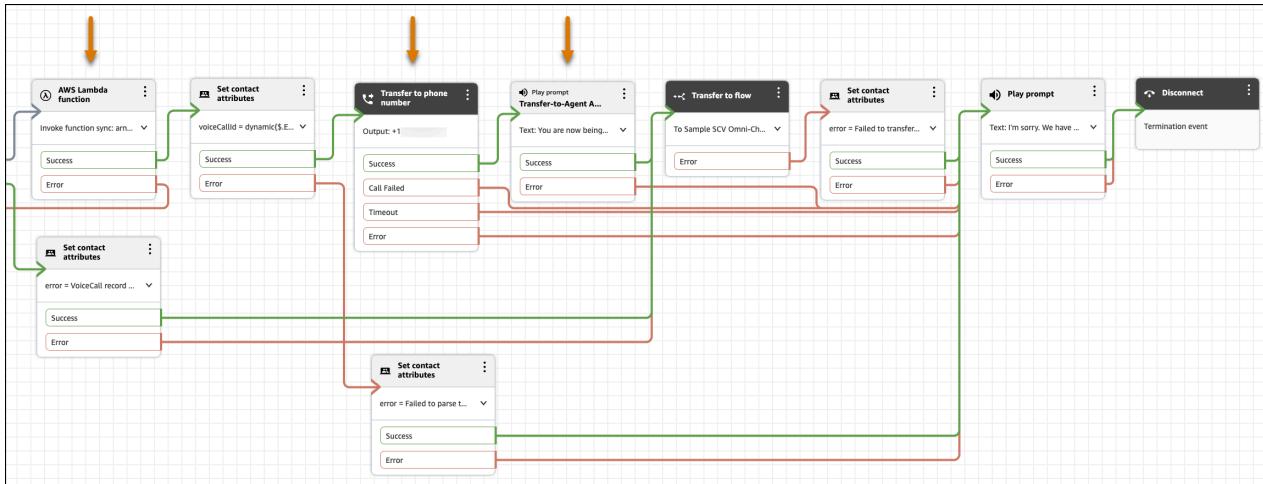
3. Click **Save**.
4. To transfer inbound calls to the procured phone number, add a Transfer to Phone Number block to the flow.
Add the Transfer to Phone Number block after you create the VoiceCall record and set the VoiceCall ID for the record.
5. In the Transfer To field, enter the procured phone number.



6. Click **Save**.
7. After the Transfer to Phone Number block, add a Play Prompt block to notify the customer that they are being transferred to an agent.



8. Click **Save**.
9. Connect the inputs and outputs of the new blocks that you added to the flow.



10. Save and publish the Amazon Connect flow.
11. To test that the call is transferred to the voice-enabled agent, call the inbound call phone number. You can find the phone number in the Phone Numbers page in Amazon Connect.

The screenshot shows the "Phone numbers" section of the Amazon Connect console. A single phone number is listed:

Phone Number	Description	Phone Type	Active Channels	Contact flow/IVR	Country
+1	First Phone Number	DID	Voice	SCV Inbound Flow to Transfer Cal...	US

Below the table, there are buttons for "Download CSV", "Release", and "Claim a number". A sidebar on the left provides navigation links for managing phone numbers.

Next, it's time to configure the telephony system to handle call escalations from the agent to a rep.

Configure Inbound Call Transfers Using SIP

To illustrate how to configure inbound call transfers that happen via SIP, this topic describes how to accomplish these tasks with Genesys.

Create the Voice Call record using the voiceCalls Telephony Integration API

To create the voice call record, use the voiceCalls Telephony Integration API.

For more information about the API, see [voiceCalls Telephony Integration API](#). Set these request parameters as needed.

Request Parameter	Description
<code>to</code>	The contact center inbound number that the customer dials.
<code>from</code>	The customer's phone number. For Genesys, you can use the data variable <code>Call.Anr</code> .
<code>callcenterApiName</code>	The API name of the contact center created in Salesforce and associated with the voice call record.
<code>scrtBaseUrl</code>	<p>The SCRT2 URL for the org.</p> <p>Format:</p> <p><code>https://<org_domain>.my.salesforce-scrt.com/telephony/v1</code></p> <p>Example:</p> <p><code>https://mycompany.my.salesforce-scrt.com/telephony/v1</code></p>
<code>orgId</code>	<p>The 15- or 18-digit ID of the Salesforce org.</p> <p>Format: <code><Salesforce_org_ID></code></p> <p>Example: <code>00XXXXXX00000QMC</code></p>
<code>callAttributes</code>	<p>Additional attributes to include in the voice call record, where each key-value pair corresponds to a standard or custom field and its values.</p> <p>Format: <code>{'<field_name>': '<field_value>'}</code></p> <p>Example of a Department custom field: <code>{ 'Department__c': 'Support' }</code></p>
<code>vendorCallKey</code>	<p>A unique key that identifies the voice call record within the telephony system. For example, this value is the contact ID in Amazon Connect. To get the call key for Genesys, use the Genesys interaction ID data variable <code>Call.ConversationId</code>.</p>

(For SIP only) UUI Header for a SIP Trunk

When Salesforce sends a SIP invite, it sends the UUI header that contains parameter settings. Set the UUI header to provide your Salesforce org ID, the Salesforce domain, partner voice call ID, JWT token, and, if needed, other parameters that you pass into your inbound flow.

Specify these parameters in the UUI header. Note that a SIP header can have a maximum of 1,024 characters.

UUI Parameter	Description	Max Length
<code>orgId</code>	<p>Format: <Salesforce org ID></p> <p>String. Required if token isn't provided. Custom header. The 15- or 18-character ID of the Salesforce org.</p> <p>If you provide a token, <code>orgid</code> is optional. We can derive the <code>orgId</code> from the token.</p> <p>Example: <code>00DZ70000000XXX</code></p>	15 or 18 characters
<code>scrt2Domain</code>	<p>Format:</p> <p><ccaaS_partner_my_domain>.salesforce-scrt.com</p> <p>String. Required. Custom header. The unique Salesforce domain in the format.</p> <p>Example:</p> <p><code>mycompanynname.my.salesfor ce-scrt.com</code></p>	128 bytes
<code>token</code>	<p>String. Required. The encrypted key used for authentication. The runtime authentication requires a JSON Web Token (JWT).</p> <p>For non-Service Cloud Voice customers, exclude the <code>sub</code> field. Otherwise, authentication fails.</p> <p>This token length may change as</p>	No max limit

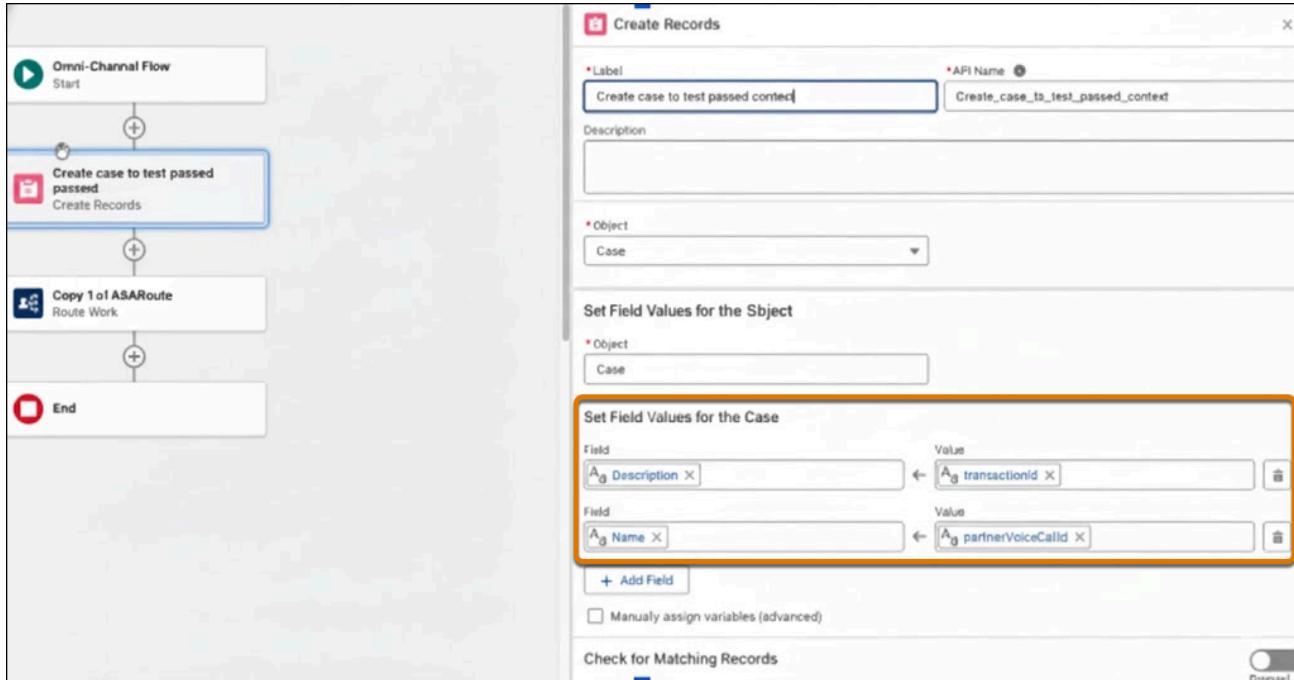
UUI Parameter	Description	Max Length
	<p>we adopt other encryption algorithms. Note that a SIP header can have a maximum of 1,024 characters.</p> <p>If your telephony provider reuses tokens across multiple calls, to prevent authentication from failing too soon, change the JWT token expiration to the maximum, 24 hours.</p>	
<code>callid</code>	<p>Format: <code><voice_call_record_id></code></p> <p>String. Optional. (For non-Service Cloud Voice customers only) Custom header. The 18-character ID of the VoiceCall record that's used to link the conversation between the agent and the customer with the conversation between the rep and the customer, giving everyone better insight into the full call history.</p>	18 characters
<code>transactionId</code>	<p>Format: <code><unique_id></code></p> <p>String. Optional. Custom header. A unique ID of any length used to provide additional context, like customer information, to the Omni-Channel flow. The flow uses this information to route the call or update related records in Salesforce. This parameter is typically used when integrating Agentforce Voice without being a Service Cloud Voice customer.</p> <p>Example:</p>	No max length

UUID Parameter	Description	Max Length
	<i>order-2026-0122-5489</i>	

Sample UUI header:

```
{
  "orgId": "00XX70000000XXX",
  "scrt2Domain": "mycompanyname.my.salesforce-scrt.com",
  "token" : "adbcdefgsdfsdJSUzI1NiIsInR5cCI6IkpxVCJ9eyJpc3MiOiIwMERTQjAwMD[THIS
IS A SAMPLE TOKEN]5h AwZFBWR2ciLCJzdWiiOijhc2FzaXBvcmczc2RiMyIsImV4cCI6MTc2OTc
xOTcyOSwiaWF0IjoxNzY5NzE2MTI5LCJqdGkiOiI5OGE1YjcyZS1mOTFhLTQzMmItYjUwYy05Nzg[THIS
IS A SAMPLE TOKEN]3847ufpawiu4f3hapwu93gbpawiu3hrao283938w4t34t m_HWOZDjb8
2UObqk_nR_6IhvDB7JA5v30v2icmZsR3NgT_uaweiur3h498rh2334984htg34o[THIS IS A SAMPLE
TOKEN]3948 4VoFjDsie6N91Alc0fZgdnT_j89mM14rFaSNY9m",
  "callId": "50130000009xYZ1AAM",
  "transactionId": "order-2026-0122-5489"
}
```

When Salesforce sends a SIP invite, it sends the UUI header that contains these parameter settings. When the SIP transfer is executed, the callId and transactionId variables are passed to Salesforce and can be used in the Omni-Channel inbound flow to update data related to the voice call. To use this UUI header information in an Omni-Channel flow, use the `transactionId` and `partnerVoiceCallId` flow variables for the transaction and call IDs, respectively.



(For SIP only) Sample Genesys Inbound Flow

To illustrate how to create VoiceCall records, set the UUI header, and configure inbound call transfers and escalations in a telephony system, review the steps used to create this Genesys flow.

1. Procure an inbound phone number from Genesys that will trigger the Genesys inbound flow. When the customer calls your organization using this number, the inbound flow routes the call to the Agentforce agent.
2. Install the Function Data Action in your Genesys Cloud and ensure all [required permissions](#) are added.
 - a. In Genesys, go to **IT and Integrations | Integrations**, and click **Install** for Function Data Actions.

The screenshot shows the 'Integrations / Add integration' page. A search bar at the top has 'Function' typed into it. Below the search bar, there are two cards:

- AWS Lambda Data Actions**: Uses data actions to invoke AWS Lambda functions in your AWS account. Status: Installed 1/10. Buttons: **Install** (highlighted), **Details**.
- Function Data Actions**: Execute custom code by way of a data action. Status: Installed 1/10. Buttons: **Install**, **Details**.

At the bottom right of the page, it says 'More available at Genesys AppFoundry'.

- b. To add an action that creates a voice call, in the Data Actions section, click **Add Action**.
 - c. In the Action Name field, enter the name of the action and click **Add**.

The screenshot shows the 'IT AND INTEGRATIONS' menu with 'Data Actions' selected. On the left sidebar, under 'Data Actions', 'OAuth', 'Operational Console', and 'Single Sign-on' are listed. The main area shows a table of existing actions:

Name	Status	Category	Type	Actions
CreateVoiceCallUsingFDA	Published	Function Data Actions	Custom	⋮
CreateVoiceCallWithParams	Published	AWS Lambda Data Actions	Custom	⋮
CreateVCWithDA	Published	Function Data Actions	Custom	⋮

A modal dialog titled 'Select Integration for Action' is open in the foreground. It contains fields for 'Integration Name' (set to 'Function Data Actions') and 'Action Name' (set to 'CreateVCUsingFDA'). Buttons at the bottom are 'Cancel' and 'Add' (highlighted).

- d. Define the contract as shown here.

Input contract:

```
{
  "type": "object",
  "properties": {
    "to": {
      "type": "string"
    },
    "from": {
      "type": "string"
    }
  }
}
```

```
"callCenterApiName": {
    "type": "string"
},
"scrtBaseUrl": {
    "type": "string"
},
"orgId": {
    "type": "string"
},
"privateKey": {
    "type": "string"
},
"callAttributes": {
    "type": "string"
},
"vendorCallKey": {
    "type": "string"
}
}
```

Output contract:

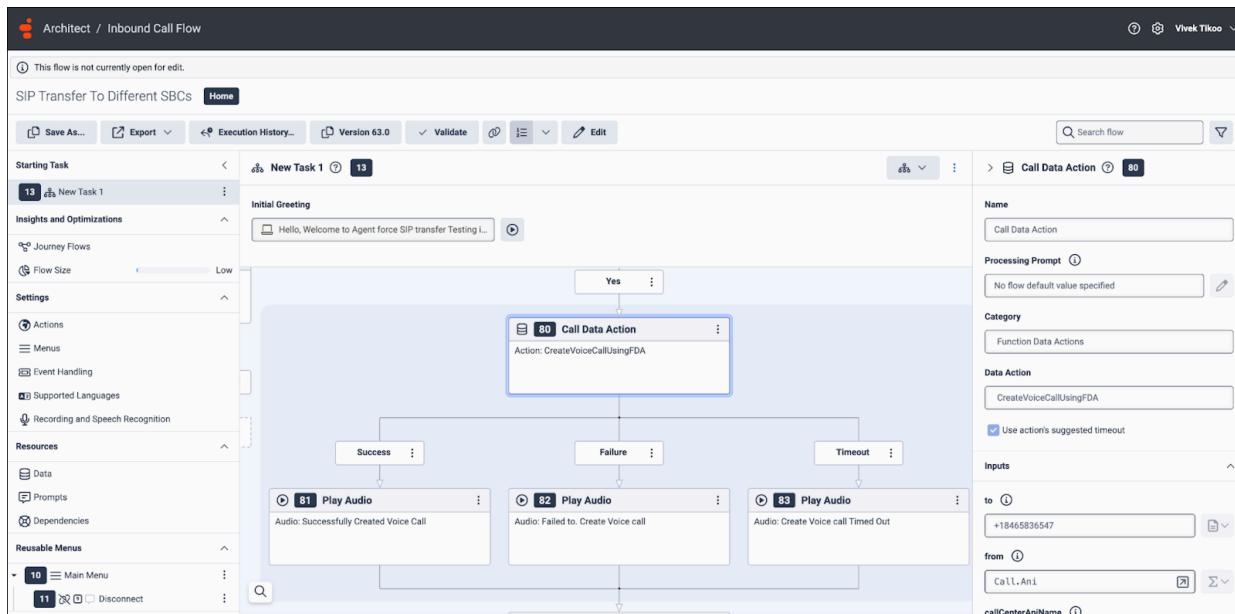
```
{
  "type": "object",
  "properties": {
    "voiceCallId": {
      "type": "string"
    }
  }
}
```

The screenshot shows the 'Contracts' configuration screen within the Einstein Generative AI Solution setup. The left sidebar lists various Einstein features like Profile, Activity, Workspace, Performance Management, Contacts, Analytics, Orchestration, Digital and Telephony, Conversation Intelligence, Workforce Management, User Management, IT and Integrations, and Account. The main area has tabs for Summary, Setup, and Contracts. Under Contracts, there are fields for Title, To, From, callCenterApiname, writerEmail, orgId, privateKey, and callAttributes. A 'Test' tab is also visible. Below the main form is an 'Output Contract' section with 'Simple' and 'JSON' tabs, and a 'Title' field.

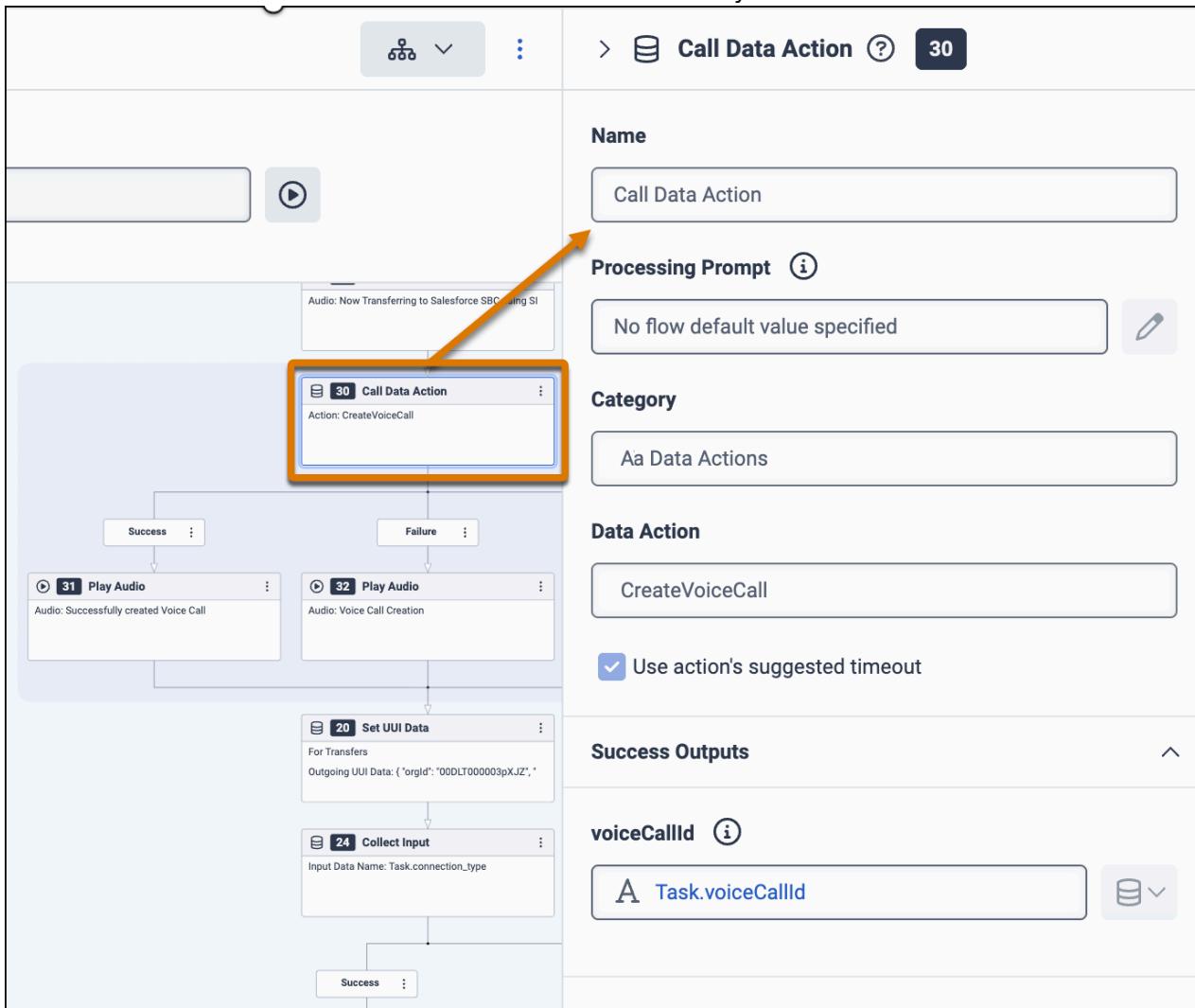
- e. To create voice calls, use [this Lambda](#) inside your function definition.
- f. To test the function, in the Test Menu Action, replace the new line with `\n` in your private key.

The screenshot shows the 'Test' configuration screen for a Function Data Action. It includes fields for 'Contracts' (with value '+1256'), 'Configuration' (with value 'from +4545'), 'Function' (with value 'callCenterApiname usa672cc'), 'Test' (with values 'scrtBaseUrl https://usa672.ipgenesys.sfdctest.my.salesforce-scrt.com/telephony/v1', 'orgId 00VG000006xG6w', 'privateKey -----BEGIN PRIVATE KEY-----\nMIIEvQIBADANBgkqhkiG9w0BAQEASCBKcwggSAgEAAoIBAQDza7IIQNp1yBF0\nv00T\nv5K5txQDuo\nhNagKtAx\nDujk9/LP85HrdtbEr2D+jdSubLeKCYkrBThw\nnPIVY15F80uL6PKxF14U2vQa68Fjd6NsxQh/SfBvxdft3913R6aJ07IM8Uh1d...', 'callAttributes {"Department__c':'Support'}', 'vendorCallKey vQIBADANBgkqh'), and 'Run Test' (checkbox checked). At the bottom are buttons for Save Draft, Save & Publish, Viewing Published, and Cancel.

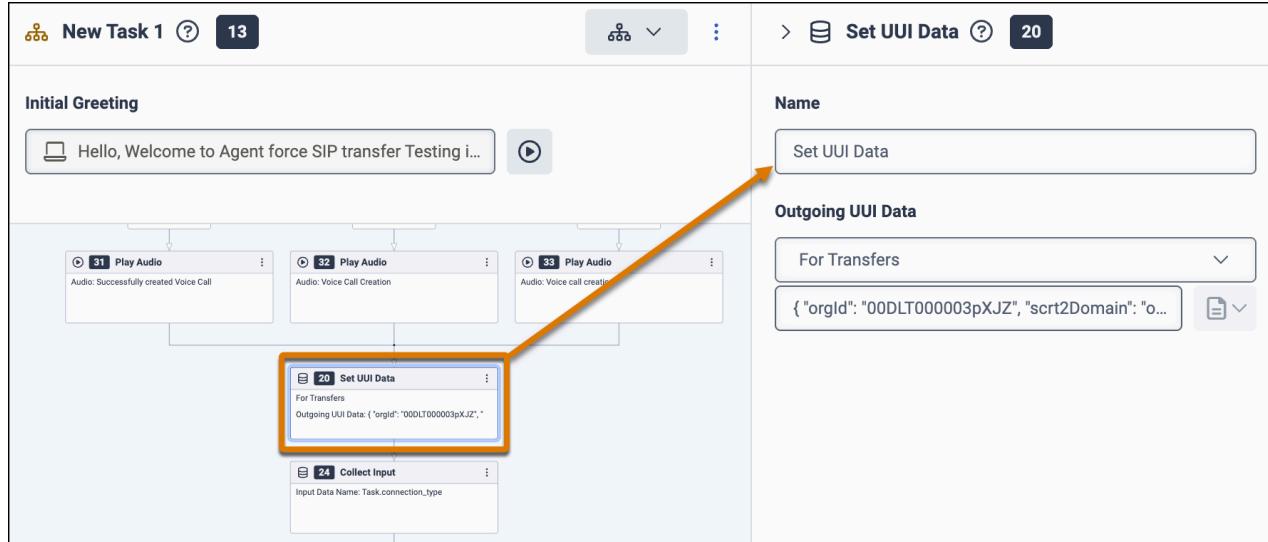
- g. If the test is successful, publish your Function Data Action.
3. In Genesys Cloud Architect, [create an inbound flow](#).
An inbound flow handles incoming calls to your organization's Genesys instance and routes the calls to their correct destination, such as a rep, a queue, or even an Agentforce agent.
4. To enable call transcription, add a Transcription action.
5. To enable call recording, add an Enable Participant Recording action.
6. To greet the customer, add a Play Audio action.
7. To create the voice call record that will be transferred to the Agentforce agent, add a Call Data Action with these properties. This call outputs the voice call ID as `partnerVoiceCallId`.
 - a. In the Name property, enter `Call Data Action`.
 - b. In the Category property, select **Function Data Actions**.
 - c. Set the request parameters as needed. For a list and description of the parameters, see Configure Inbound Call Transfers and Call Escalation in the Telephony System.



8. To create a voice call using the Function Data Action that you previously installed, configure the Call Data Action to output the voice call ID to a parameter with name `voiceCallId`. You must create the VoiceCall record and set the VoiceCall ID for the record before you route the call.



9. To determine what happens based on whether the creation of the voice call succeeds, fails, or times out, add a Decision action.
10. To set the UUI header parameters, add the Set UUI Data action. For a list and description of the parameters, see [Configure Inbound Call Transfers and Call Escalation in the Telephony System](#).

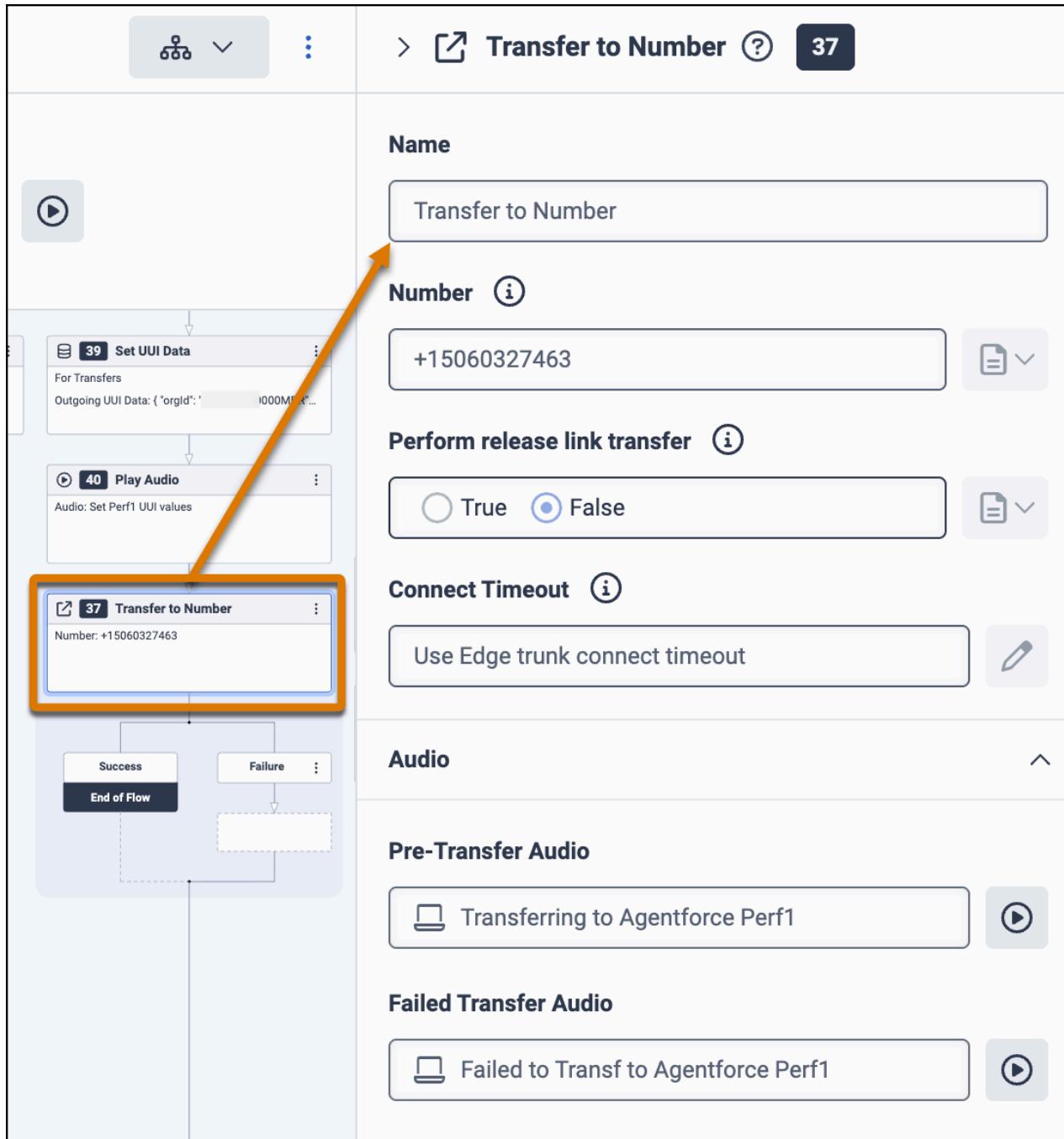


11. Enter the name of the action.
12. In the Outgoing UUI Data, select **For Transfers** and enter the UUI parameters in a JSON object consisting of key-value pairs. For example, enter:

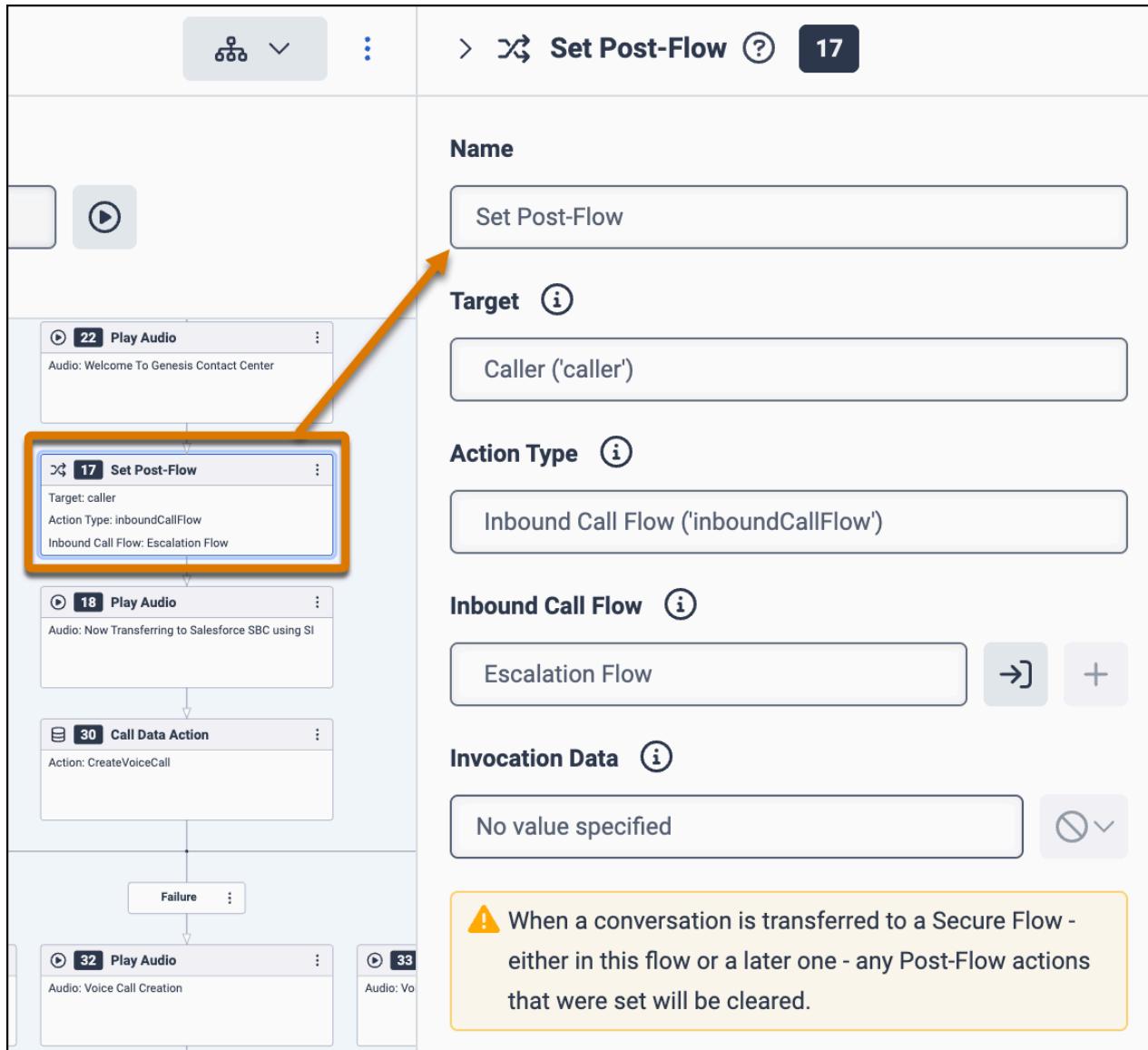
```
{
  "orgId": "00XX70000000XXX",
  "scrt2Domain": "mycompanynname.my.salesforce-scrt.com",
  "token" : "adbcdefgsdfsdJSUzI1NiIsInR5cCI6IkpxVCJ9.eyJpc3MiOiIwMERTQjAwMD [TH
  IS IS A SAMPLE TOKEN] 5h AwZFBWR2ciLCJzdWIiOiJhc2FzaXBvcmc2RiMyIsImV4cCI6MT
  c2OTcxOTcyOSviaWF0IjoxNzY5NzE2MTI5LCJqdGkiOiI5OGE1YjcyZS1mOTFhLTQzMmItYjUwYy
  05Nzg [THIS IS A SAMPLE TOKEN] 3847ufpawiu4f3hapwu93gbpawiu3hrao283938w4t34t
  m_HWOZDjb82UObqk_nR_6IhvDB7JA5v3Ov2icmzsR3NgT_uaweiur3h498rh2334984htg34o [TH
  IS IS A SAMPLE TOKEN] 3948 4VoFjDsie6N9lAlc0fZgdnT_j89mM14rFaSNY9m",
  "callId": "5013000009xYZ1AAM",
  "transactionId": "order-2026-0122-5489"
}
```

Select the User-to-User option. If you have multiple environments, such as dev and test environments, add a UUI Data action for each environment.

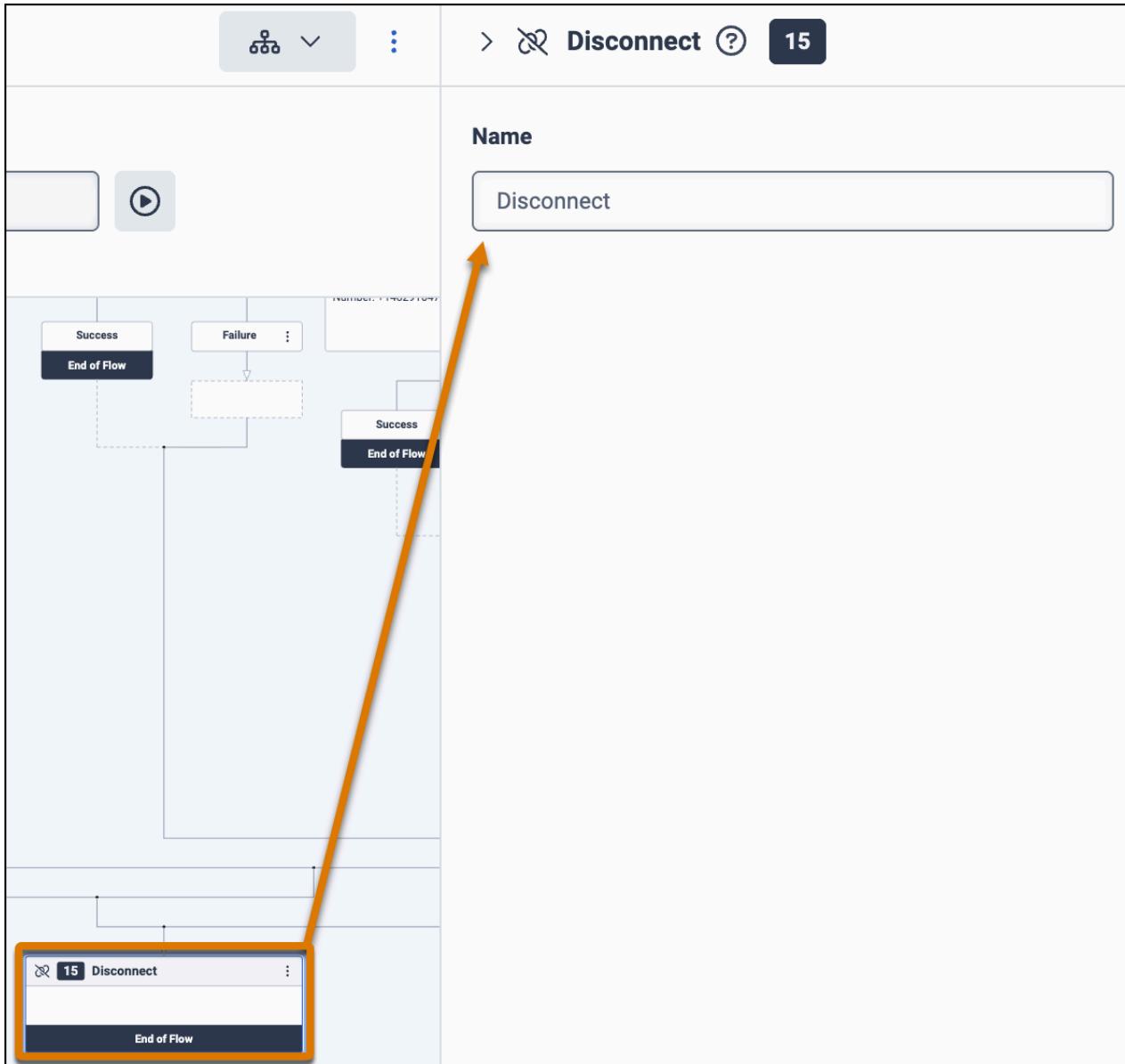
13. If you have multiple environments, such as dev and test environments, add a UUI Data action for each environment.
14. To route inbound calls to the agent, add a Transfer to Number action. For the number, specify the SIP address that you specified when creating the messaging channel for Agentforce Voice. Although this is not an actual phone number, the value must be in the E.164 phone number format.
When we send a SIP invite with the Transfer to Number action, we send the UUI header that contains the UUI parameter settings. This action triggers the channel's Omni-Channel flow, which routes the call to the Agentforce agent defined in the flow.



- To notify the customer that you are routing them to an Agentforce agent, enter the pre-transfer and failed transfer audio in the Transfer to Number properties or add a Play Audio action.
- To route the call to the escalation flow when the Agentforce agent disconnects, add a Set Post-Flow action. Set the Target field to Caller.



17. Add a Disconnect action at the end of the flow.



18. Save, validate, and then publish the flow.

Add call routing in Genesys Admin to route calls using this flow. To learn how to configure the telephony system to handle call escalations from the agent to a rep, see [Configure Call Escalation in the Telephony System](#).

Configure Call Escalation in the Telephony System

If the agent call is escalated, the agent is disconnected and the telephony system resumes the call. If supported, configure the telephony system to handle the escalated call, including transferring the call to the appropriate rep.

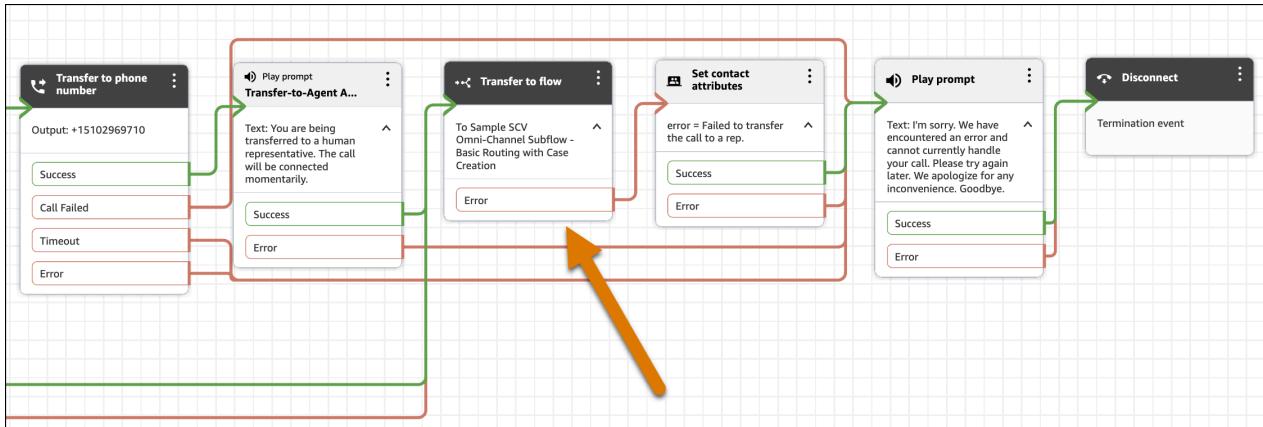
-  **Note** Call escalation doesn't work if you directly call the procured number. You must transfer the call to the agent from the telephony system.

To illustrate how this works, this topic describes how to accomplish this task using Service Cloud Voice with Amazon Connect. Specifically, configure the Amazon inbound flow to resume the call where it left off, which is after transferring the original call to the agent.

1. In Amazon Connect, edit the inbound Amazon Connect flow.
2. Select the Transfer to Phone Number block that you configured in [Configure Inbound Call Transfers in the Telephony System](#).
3. To enable this Amazon Connect flow to resume the call after the Agentforce agent is disconnected, in the Resume Flow After Disconnect field, select Yes and click **Save**.

The screenshot shows the 'Transfer to phone number' configuration page. At the top, there are three tabs: 'Config' (which is selected), 'Connections', and 'Notes'. Below the tabs, there is a 'Block Name' field with a placeholder 'Enter a block name' and a character limit of 50. A descriptive text block follows, stating 'Transfer a call to a phone number for voice interactions.' with a 'Learn more' link. The 'Transfer to' section contains two options: 'Set manually' (selected) and 'Set dynamically'. Under 'Set manually', a 'Country code' dropdown is set to 'United States +1'. The 'Phone number' field contains the digit '5'. The 'Set timeout' section also has two options: 'Set manually' (selected) and 'Set dynamically'. Under 'Set manually', a 'Timeout (in seconds)' input field is set to '30'. A large orange box highlights the 'Resume flow after disconnect' section, which includes a description: 'Adds success, call failed and timeout output branches' and two radio button options: 'Yes' (selected) and 'No'.

4. Configure the telephony logic to route the call. For example, to transfer the call to an Omni-Channel flow that routes the call to a rep, add a Transfer to Flow block in the Amazon flow.



- Save and publish the Amazon Connect flow.

Connecting Related Voice Calls

When an incoming call is transferred to an Agentforce agent or a human service rep, a separate voice call record can be created in Salesforce for that leg of the call. As a result, you might have multiple voice call records for conversation with a customer. To provide a single, comprehensive view and preserve the call context, connect these related voice call records. This connection enables more informed decisions, such as escalating the call to the appropriate rep based on all gathered information.

When you connect two voice call records, each record has a link to the other record in the Previous Call or Next Call field. Each voice call record includes details about that segment of the call, including the transcript and, if supported, recording.

The screenshot shows a Salesforce Voice Call record. At the top, there's a 'Voice Call' icon, a 'x+1!' contact name, and three buttons: 'Edit', 'Share Voice Call', and 'Delete'. Below this, the record details are listed: 'Related Record' (with a '+ Add' button), 'Call Started' (10/7/2025, 10:10 PM), 'Call Duration' (00:00:34), 'Call Type' (Inbound), and 'Name' (VC-00000017). A navigation bar below shows 'Details' (underlined), 'Feed', and 'Related'. Under 'Details', there are two columns of information. The left column includes 'Caller Contact Info' (x+1!), 'Owner Name' (OrgFarm EPIC), 'Call Started' (10/7/2025, 10:10 PM), 'Call Entered Queue' (10/7/2025, 10:11 PM), 'Call Accepted' (10/7/2025, 10:11 PM), and 'Call Ended' (10/7/2025, 10:12 PM). The right column includes 'Call Type' (Inbound), 'Call Status' (completed), 'Recipient Contact Info' (x+1!), and a section for 'Previous Call' (VC-00000018) which is highlighted with a red border. Below this are 'Next Call' and 'Call Duration' (00:00:34).

If you are a Service Cloud Voice customer, in many cases, the calls can be automatically connected. In other cases, you might have to manually configure the linking between calls. This section addresses how to connect related calls for different scenarios.

- Note** If you are not a Service Cloud Voice customer, connecting calls isn't supported. Salesforce creates the voice call between the customer and the Agentforce agent, but no other voice call records.

Types of Voice Calls

For each incoming call, you can have these types of related voice call records.

Recommended Call Flow for Handling Calls

The recommended call flow minimizes the number of voice call records and connects related records. When possible, use this flow for handling the different legs of the call.

Connect the Initial and Agent Voice Call Records

To preserve the call context across related voice call records, connect the voice call records associated with the same call. By default, Salesforce creates a voice call record that captures the conversation between the agent and customer. If you configured the telephony system to create a voice call record to capture the conversation between the rep and customer, turn on this feature to relate both records. The procedure varies based on whether you use PSTN or SIP to transfer voice calls.

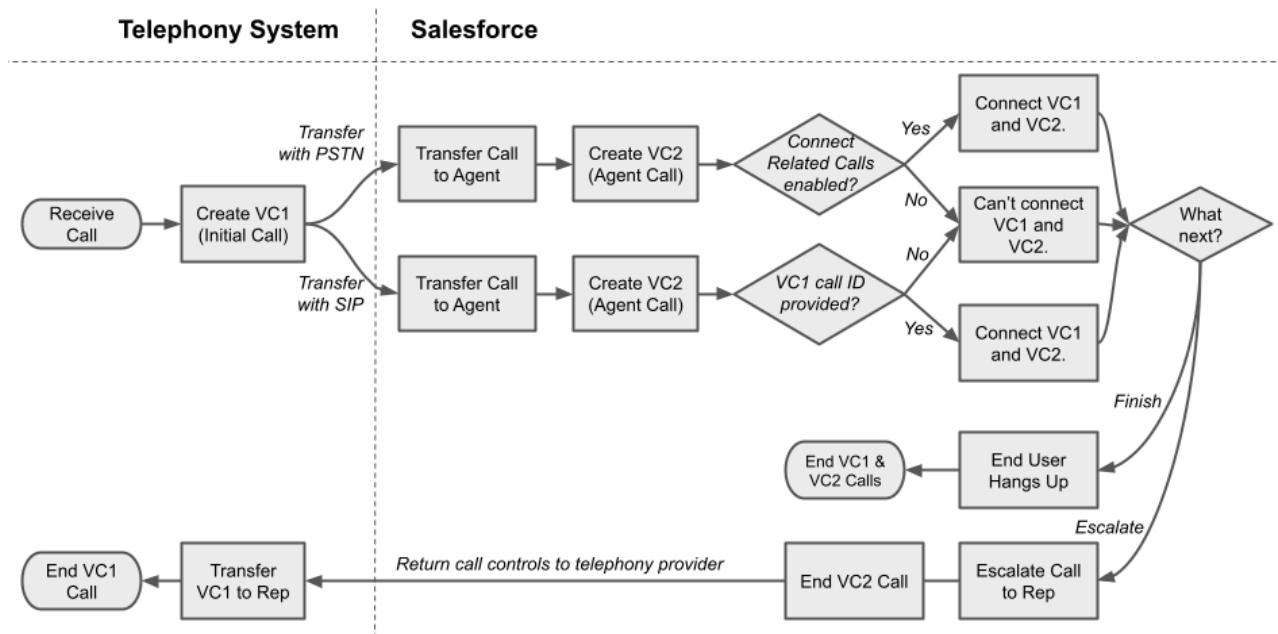
Types of Voice Calls

For each incoming call, you can have these types of related voice call records.

Voice Call Record Type	Description
Initial voice call record (VC1)	The telephony provider, usually an IVR, creates this voice call record for each incoming call.
Agent voice call record (VC2)	When the call is transferred to an Agentforce agent, by default, Salesforce creates this voice call record and automatically links it to the initial voice call record (VC1).
Rep voice call record (VC3)	If the call is then escalated to a human rep and the initial voice call record (VC1) can't be transferred, a separate rep voice call record (VC3) can be created for that leg of the call. To ensure all three voice call records are connected, VC3 must be linked to either VC1 or VC2. This linking is effective because VC1 and VC2 are already connected automatically.

Recommended Call Flow for Handling Calls

The recommended call flow minimizes the number of voice call records and connects related records. When possible, use this flow for handling the different legs of the call.



This diagram illustrates these steps in a call flow.

1. First, the telephony system receives an incoming call.
2. If configured, the telephony system creates the Initial voice call record (VC1).
Tip To create a voice call record in Salesforce, use the [VoiceCalls](#) Telephony Integration API.
3. If configured, the telephony system transfers the call to an agent using the specified communication protocol: PSTN or SIP.
 - If the transfer happens with PSTN:
 - Salesforce creates the Agent voice call record (VC2).
 - If the Connect Related Calls option is enabled for Agentforce Voice, then Salesforce automatically connects the VC1 and VC2 records. If the option is disabled, the voice call records aren't connected.
 - If the transfer happens with SIP:
 - Salesforce creates the Agent voice call record (VC2).
 - If the ID of the VC1 voice call record is passed into the `callid` parameter in the UUI header, then Salesforce automatically connects the VC1 and VC2 records. If the parameter isn't provided, the voice call records aren't connected.
4. If the customer hangs up, the VC1 and VC2 calls end.
5. If the agent escalates the call to a human service rep, the VC2 call ends, and the call controls revert to the telephony provider. The telephony provider uses the VC1 call. When the conversation concludes, the VC1 call ends.
6. If the call is escalated from the agent to a human service rep, the VC2 call ends and the call controls are returned to the telephony provider, which uses the VC1 call. When the call finishes, the VC1 call ends.

Connect the Initial and Agent Voice Call Records

To preserve the call context across related voice call records, connect the voice call records associated with the same call. By default, Salesforce creates a voice call record that captures the conversation between the agent and customer. If you configured the telephony system to create a voice call record to capture the conversation between the rep and customer, turn on this feature to relate both records. The procedure varies based on whether you use PSTN or SIP to transfer voice calls.

(For PSTN only) Connect the Initial and Agent Voice Calls

When using PSTN to transfer voice calls to an agent, connect the Initial and Agent voice calls using this process.

(For SIP only) Connect the Initial and Agent Voice Calls

To enable Salesforce to automatically connect the VC1 and VC2 records, pass the VC1 ID into the `callid` parameter of the UUI header when you transfer a call to the agent. If the parameter isn't provided, the voice call records aren't connected.

(For PSTN only) Connect the Initial and Agent Voice Calls

When using PSTN to transfer voice calls to an agent, connect the Initial and Agent voice calls using this process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions, and **Service Cloud Voice add-ons**.

- (checkmark) **Note** In rare cases, this feature might not function as expected. For example, we can't distinguish between callers if multiple individuals share the same phone number and place inbound calls simultaneously.

1. From Setup, in the Quick Find box, enter *Agentforce Voice*, then select **Agentforce Voice Setup**.
2. Under Setup Steps in the Agentforce Voice Setup page, enable **Connect Related Voice Calls**, and then click **Enable**.

The screenshot shows the 'Agentforce Voice Setup' page under the 'PSTN' tab. It lists seven setup steps:

1. Create a Voice-Enabled Agent
2. Configure Call Routing and Call Escalation for the Agent
3. Procure a Phone Number for the Channel
4. Create the Messaging Channel for Agentforce Voice
5. Configure Telephony Vendor Settings for Call Routing and Escalation
6. Connect Related Voice Calls
7. Record Voice Calls with Agents

Step 6, 'Connect Related Voice Calls', has a status indicator showing it is 'Enabled' with a checked checkbox. Step 7, 'Record Voice Calls with Agents', has a status indicator showing it is 'Disabled' with an unchecked checkbox.

(For SIP only) Connect the Initial and Agent Voice Calls

To enable Salesforce to automatically connect the VC1 and VC2 records, pass the VC1 ID into the callid parameter of the UUI header when you transfer a call to the agent. If the parameter isn't provided, the voice call records aren't connected.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions, and [Service Cloud Voice add-ons](#).

(For PSTN only) Record Voice Calls with Agents

To record the conversations between customers and Agentforce agents, turn on the recording. By default, the recording is turned off.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with Foundations or Agentforce 1 Editions, and [Service Cloud Voice add-ons](#).

 **Note** The steps below apply to Agentforce Voice with PSTN. For Agentforce Voice with SIP, turn on recording in the partner telephony system. If the partner telephony doesn't support call recording, then the recording isn't available on the voice call record or in Agentforce Studio.

1. From Setup, in the Quick Find box, enter *Agentforce Voice*, then select **Agentforce Voice Setup**.
2. Under Setup Steps in the Agentforce Voice Setup page, enable **Record Voice Calls with Agents**.

Transfer Conversations from an Agent with an Omni-Channel Flow

When an agent encounters conversations that it can't resolve, it uses the Escalation topic to escalate the conversation. In the new Agentforce Builder, you can also run the Escalation topic using the escalate utility function in Agent Script. Escalation and transferring works differently depending on the agent type and channel. You can customize the experience that customers receive when transferring isn't possible.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. [Required add-on licenses vary by agent type](#).

 This article applies to: Agentforce Service agents and Agentforce Employee agents

To learn about channel support for other agent types, see the documentation for that type.

User Permissions Needed	
To build and manage Employee agents:	Manage AI Agents OR Customize Application
To build and manage Service agents:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application

Agentforce Service agents and Employee agents use the Escalation topic to escalate conversations. If your agent doesn't have the Escalation topic, it can't escalate sessions. To make sure that agents escalate according to your company policies, we recommend customizing this topic with actions and instructions. For example, we made it easy for users to request a rep by using phrases such as "transfer to a representative." Consider adding phrases that are specific to your business needs to your agent's instructions, such as "investment banker" or "front desk."

Escalation works differently depending on the agent template and channel. On enhanced messaging channels, service agents transfer conversations to a specified destination, such as a rep or queue, using an outbound Omni-Channel flow. Similarly, when an employee agent is connected to an Experience Cloud site with Enhanced Web Chat, the agent uses the Escalation topic to transfer the conversation to the rep or queue you set in the Omni-Channel flow. Transfers aren't supported for employee agents that are connected to the Agentforce panel in Lightning Experience or the Salesforce mobile app.

1. Create and activate an outbound Omni-Channel flow from scratch that can route your agent's conversations to another destination, such as a service rep, queue, or different agent. If using the same flow to route multiple types of records, don't use an input_record variable in your flow, as this variable must be linked only to one type of record and the flow will not work for other types of records. The conversation history, including messages and information gathered, is also transferred to the next destination.
 - [Route Work Items to Queues](#)
 - [Route Work Items Directly to a Specific Agent](#)
 - [Route Work Items to Skills](#)
 - [Make Smarter Routing Decisions by Checking Service Rep Availability](#)
2. Add the outbound flow to your agent in Agentforce Builder.
 - a. From the App Launcher, enter *Agent*, and then select the **Agentforce Studio** app.
 - b. On the Agents tab, click the name of your agent.
 - c. In the Explorer panel, select the Messaging connection.
 - d. On the canvas, in the Escalations section, select the outbound flow that you created in the Escalation Flow field. If your flow doesn't appear in the list, activate the flow and try again.
3. Add the outbound flow to your agent in the legacy Agentforce Builder.

- a. From Setup, in the Quick Find box, enter *Agents*, and then select **Agentforce Agents**.
 - b. Click the name of your agent. Then, on the Details page, click **Open in Builder**.
 - c. In the legacy builder, click the **Connections** tab.
 - d. In the Escalations section, from the Escalation Flow field, select the outbound flow that you created. If your flow doesn't appear in the list, activate the flow and try again.
4. Add an escalation message. The agent sends this message before it attempts to transfer the conversation to the destination specified in your outbound Omni-Channel flow.

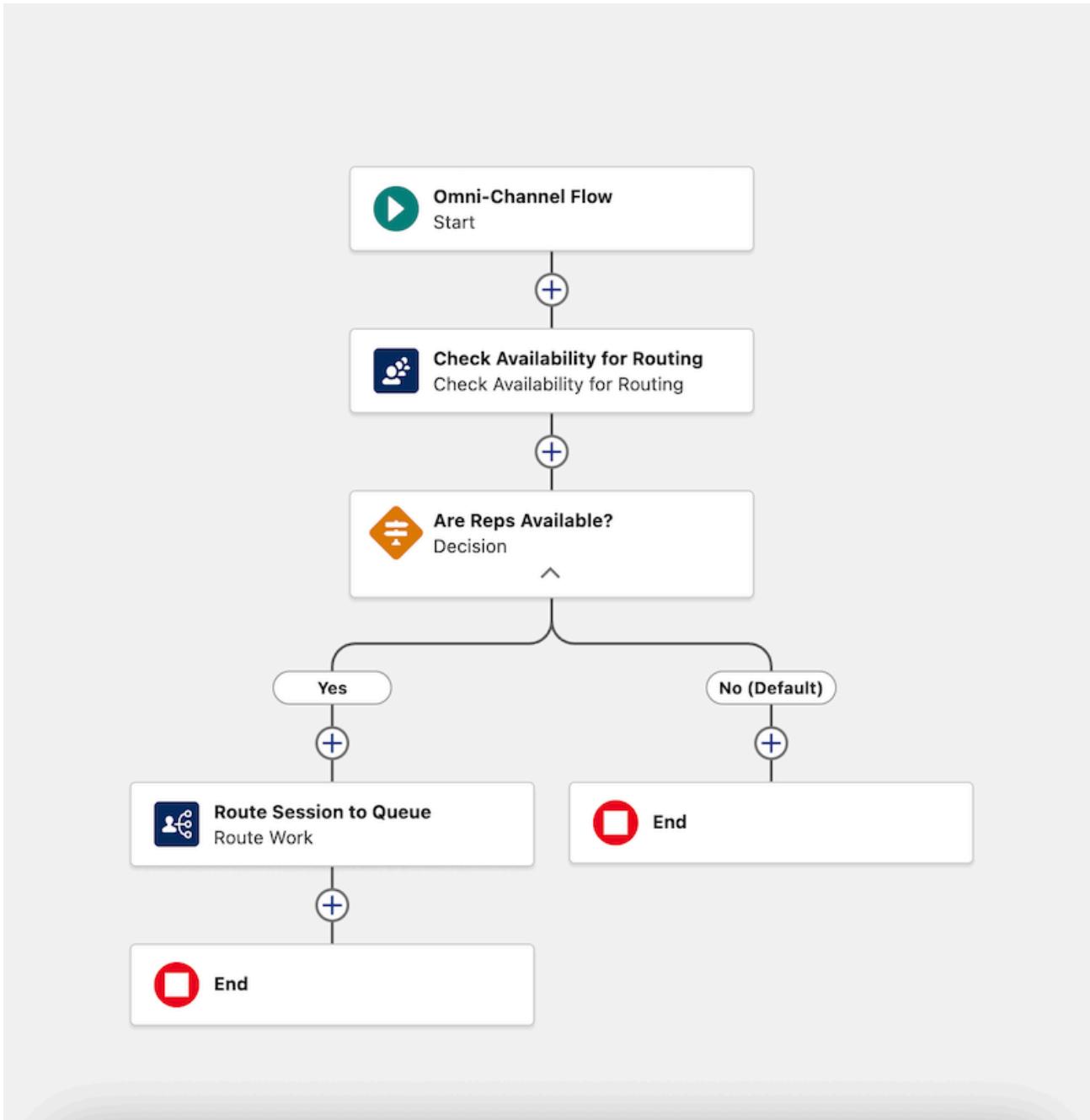
Your agent includes a default escalation message that you can edit to better match your company's brand. As a best practice, configure the message to clearly indicate that the conversation is being transferred to a rep.

The escalation message is automatically translated based on the end user's language setting. If the language isn't supported, the original message is sent without translation.

Customize the experience that end users receive when transferring isn't possible. By default, when the transfer isn't completed, the agent continues the session with the customer based on the Escalation topic and retains the context of the conversation before the transfer was attempted. Agents attempt transferring with the Escalation topic only once per session.

- Determine service rep availability and estimated wait time by adding the Check Availability for Routing action element to your outbound Omni-Channel flow.
- Update the escalation message to reflect your customized escalation experience. For example, you could say, "One moment while I check if there are any service reps available."
- Customize the Escalation topic to guide the agent when a transfer isn't completed. For example, add an instruction that tells the agent to create a case with the [Create Case with Enhanced Data action](#) in the Case Management topic. Employee agents connected to Enhanced Web Chat don't support case creation when escalation isn't completed.

For example, this outbound Omni-Channel flow checks if reps are available and then routes the session to a queue. If no reps are available or a transfer isn't possible, the flow ends and the agent continues the conversation session with the user.



See Also

- [Deploy Your Agent to Channels](#)
- [Create an Omni-Channel Flow](#)

Activate or Deactivate Your Agent

Activate your agent to make it available to your customers or employees. When an agent is deployed to one or more channels, including the Agentforce panel, activating the agent makes it immediately available to your users.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To activate or deactivate AI agents:	Manage AI Agents AND the required permissions for your agent type
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Only one version of an agent can be active at a time. You can have up to 100 concurrently active agents. When you activate a version of an agent that already has an active version, the currently active version is automatically deactivated.

Deactivating an agent interrupts any ongoing user conversations. Users aren't notified that an agent is deactivated. The agent sends the system error message as a response to any messages.

- If the agent uses the Agentforce panel, the panel is available until the user closes it, and it can't be reopened until the agent is active.
- If the agent is connected to an active Enhanced Chat deployment, the chat window appears, but the agent doesn't join the conversation.

Activate or Deactivate an Agent

1. From the Agents page of the Agentforce Studio app, open the agent you want to activate or deactivate.
2. If there are multiple versions of your agent, from the header in Agentforce Builder, select the agent version you want to activate or deactivate.
3. If you haven't already, commit your agent version. You can only activate an agent version after you've committed it.
4. Click **Activate** to make your agent live or **Deactivate** to remove it from service.

Activate or Deactivate an Agent in the Legacy Builder

To make and test changes to your agent without taking the active version out of production, [create multiple versions of an agent](#).

1. From Setup, in the Quick Find box, enter *Agent*, and then select **Agentforce Agents**.
2. Click the name of the agent you want to activate or deactivate.
3. Click **Open in Builder**.
4. Click **Activate** to make your agent live or **Deactivate** to remove it from service.

Monitor Your Agent

When you review and update your agentic solution, it has a higher chance of success. Review Agentforce analytics to report on key indicators such as performance, usage, quality, trust, cost, and ROI.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

Agent Optimization

Use Agent Optimization to inspect agent sessions from the initial user request to the agent's resolution.

Agent Analytics

Analyze your AI agents' performance within user and agent sessions. Agent Analytics is built on the unified Session Tracing Data Model (STDM), which captures every event and interaction within a session and logs it as individual events. You can query the logged events to gain insights and optimize the Agent.

Legacy Agentforce Analytics

Legacy Agentforce Analytics uses Data 360 to help you gain insights into how your agents are performing. The insights in your customizable dashboard and reports can help you determine whether you want to change anything to drive adoption or adjust topics and actions to improve user satisfaction.

Monitor Your Voice-Enabled Agent

To boost service quality, supervisors can monitor the voice-enabled agents on active calls by using Omni Supervisor. They can also monitor agent performance over time by using agent analytics reports and dashboards.

Agentforce Session Tracing

Agentforce session tracing captures detailed agent interaction data in a unified data model on Data 360. Build dashboards, reports, and queries on this data to derive insights into agent behavior and trends. Take data-driven action while testing, debugging, and monitoring agents in sandbox or production environments.

Monitor Agent Guardrails

Monitor instruction adherence and task resolution (beta) for your agents.

Agent Optimization

Use Agent Optimization to inspect agent sessions from the initial user request to the agent's resolution.

REQUIRED EDITIONS

Available in: **Enterprise, Performance, and Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Watch this video to learn how Agentforce Optimization and Agent Analytics work together to help you continuously refine and improve your AI agents.

Watch the video: <https://play.vidyard.com/7DfVkjIBRBiJoJpmЬсAX8m>

Here are the steps and information required to set up and use Agentforce Optimization.

About Agent Optimization

Agent Optimization provides tools to dive deeper into unresolved interactions, identify knowledge gaps, and analyze agent sessions using the Session Tracing Data Model. Agent Optimization is a key component of Agentforce Observability, designed to help you understand how your AI agents perform in real-world scenarios. By analyzing user interactions and agent responses, you can identify areas for improvement and take action to enhance agent effectiveness.

Set Up Agent Optimization

Set up Agent Optimization to analyze agent sessions, identify knowledge gaps, and dive deeper into unresolved interactions using the Session Tracing Data Model.

Use Intents in Agent Optimization

Work with intents in Agent Optimization to understand user requests, analyze interaction patterns, and improve your agent's performance.

Troubleshoot Agent Optimization

Resolve common issues with Agent Optimization, including setup problems, data display issues, and performance concerns.

Data Model for Agent Optimization

Agent Optimization extends Session Tracing Data Model (STDM) capabilities by provisioning additional DLOs and DMOs that track session moments and user intent. An LLM identifies, clusters, and tags these moments, enabling targeted queries and insights into user engagement metrics, moment duration, and response relevance quality scores.

Analyze Data with Agent Optimization

Use Agent Optimization to drill into sessions, analyze quality scores, and identify patterns to improve your agent's performance.

About Agent Optimization

Agent Optimization provides tools to dive deeper into unresolved interactions, identify knowledge gaps, and analyze agent sessions using the Session Tracing Data Model. Agent Optimization is a key component of Agentforce Observability, designed to help you understand how your AI agents perform in real-world scenarios. By analyzing user interactions and agent responses, you can identify areas for improvement and take action to enhance agent effectiveness.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Key Features

Agent Optimization introduces several powerful capabilities:

- **Intents:** Represents a set of interactions within a session that address a specific user intent or request. Intents are generated daily, then clustered and tagged weekly across all active agents.
- **Quality Scores:** Calculated using LLM, quality scores highlight how relevant the agent's response was to the user's request.
- **Session Analysis:** Dive into agent-user interactions at the intent level. Understand what users are asking and how agents are responding.
- **Trend Identification:** Identify low-performing topics by quality score, agent misinterpretations, and areas where conversations weren't handled properly, pointing to potential configuration gaps.

See Also

[Billing Considerations for Agentforce Session Tracing](#)

[Implement Data Governance Permissions for Agentforce Session Tracing Objects](#)

Set Up Agent Optimization

Set up Agent Optimization to analyze agent sessions, identify knowledge gaps, and dive deeper into unresolved interactions using the Session Tracing Data Model.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Access and view Agent Optimization

Assign Access Agent Optimization and Data Cloud User permission sets

Note

- Agent Optimization supports [Agentforce \(Default\)](#), [Agentforce Employee Agent](#), and [Agentforce Service Agent](#).
- Agent Optimization supports agent sessions in all languages. However, the analysis and insights are presented in English.
- Agent Optimization supports voice agents.

Einstein Trust Layer Service Support: Feature supports Data Masking, Data Limitation and Billing, and Privacy (PII Masking). Agent Optimization impacts your credit consumption. Data 360 credits are used for storing and querying Agent Optimization data.

Important

- Agent Optimization uses **OpenAI as its LLM provider**, regardless of your model selection.
- Agent Optimization doesn't support [geo-aware routing](#). LLM requests may be processed outside your org's geographic region.

See Also

[Set Up Agentforce Session Tracing](#)

Set Up Agent Optimization for Standard Environments

Enable Agent Optimization in your Salesforce organization to start analyzing agent sessions and optimizing performance.

1. Before enabling Agent Optimization, make sure that Data Cloud is provisioned and turned on in your organization, and that you have an active agent.
2. Verify that you have the latest version of the Salesforce Standard Data Model (version 1.124 or higher) in your org (sandbox or production). From Setup, go to **Apps -> Packaging -> Installed Packages -> Salesforce Standard Data Model**. To get the required version, click [here](#) and follow the instructions.
3. In Setup, in the Quick Find box, enter and select **Einstein Audit, Analytics, and Monitoring Setup**.
4. Turn on **Agentforce Session Tracing and Data Model**. Agent Optimization is automatically enabled when you turn on Session Tracing.
5. In Setup, locate **Users**.
6. Assign users the **Access Agent Optimization** permission set.
7. Save your work.

Set Up Agent Optimization for DC1 Environments

DC1 (Data Cloud One) support refers to a configuration where multiple Salesforce organizations share a single Data 360 instance. This setup allows for efficient data management and collaboration across organizations, with one "home organization" and multiple "companion organizationorganizations" or "LOB (Line of Business) organizations".

Companion Organization Enablement: To enable Agent Optimization for companion organizations, Einstein Setup must first be enabled in your home organization. After that, the process for enabling Agent Optimization in each organization remains the same. If you enable Agent Optimization from a companion organization, Data Cloud assets will be provisioned in the home organization and then shared to the companion organization.

The home and companion organizations operate independently, and each organization displays analytics only for its own agents.

You can select different data spaces for each organization where Agent Optimization is enabled.

Important In DC1 environments, LLM calls generated by Agent Optimization are aggregated across all organizations (home and companion organizations) and cannot be separated by individual

organization.

Restriction If more than one agent with the same API name exists in more than one organization and the organizations share the same data space, the agents are aggregated into the same view and appear as one agent. To avoid this limitation, do one of the following:

- Create different API names for agents across organizations.
 - Select different data spaces for each organization.
 - Create a data governance rule to control which data groups will have viewing permissions.
1. Ensure your home organization has Generative AI enabled.
 2. Ensure your companion organization has Salesforce Foundations or Agentforce 1 and an active companion connection.
 3. Verify Data Cloud One appears in your companion organization.
 4. Assign users the required permission sets in your companion organization: **Access Agent Optimization** and **Data Cloud One User**.

Set Up Agent Optimization for Sandbox Environments

Enable Agent Optimization in sandbox environments for testing and development purposes. Sandbox support requires specific configuration steps to reconnect connectors and activate data streams.

1. Provision Data Cloud in the sandbox organization.
2. Install the latest Salesforce standard data model package using [this link](#).
3. Reconnect connectors.



Note While connections are replicated to your sandbox, authentication data is not. As a result, all connectors will appear in a "Needs Activation" state.

From Setup, go to Data Cloud Setup > Ingestion API > AgentOpt, and click **Activate**.

4. Retoggle **Agentforce Session Tracing and Data Model**. Agent Optimization is automatically enabled when you turn on Session Tracing.
All data streams should then activate automatically.

Use Intents in Agent Optimization

Work with intents in Agent Optimization to understand user requests, analyze interaction patterns, and improve your agent's performance.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Access and view Agent Optimization	Assign the Access Agent Optimization and Data Cloud User permission sets
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Intents represent sets of interactions within a session that address a specific user request. Use intents to understand what users are asking and how your agent responds. If you encounter issues with intent generation or clustering, see [Troubleshoot Agent Optimization](#).

Intent Analysis and Clustering

Agent Optimization uses intent generation and clustering pipelines to analyze session data. The intent pipeline analyzes sessions to identify and generate intents. The clustering pipeline groups intents by shared user objectives and tags them accordingly.

Timing and Latency Considerations

Review timing characteristics to understand when intents and clusters become available in analytics.

Timing Component	Duration	Notes
Session Close Detection	Immediate to 3h	Explicit close or assumed close after inactivity
Intent Scheduler Cycle	Every 3 hours	Maximum wait time before first evaluation
Intent Pipeline Duration	4–24 hours	Typical: 4–5 hours. Maximum: 24 hours
Clustering Pipeline Duration	Up to 24 hours	Varies by data volume and complexity

Intent Analysis Lifecycle

When you enable Agent Optimization, the system records new sessions, processes them through scheduled pipelines, and generates insights.

Note Pipeline run considerations:

- If you have enabled STDM previously in setup, the first pipeline run will generate insights for intents from the last 30 days. Subsequent pipeline runs will use data from the last 7 days.
- If you haven't enabled STDM yet, insights will be analyzed only from the moment you enable it onwards.

Optimization Pipeline

The intent analysis process has distinct stages that manage session processing, pipeline execution, and data validation. Each stage has specific triggers, conditions, and timing requirements.

Analysis begins when a session closes or when the system assumes closure after inactivity. The analysis clock tracks session activity and determines when to start pipeline processing. When a session is considered "closed" (due to termination or after 3 hours of inactivity), the pipeline begins.

Trigger Type	Description	Timing
Explicit Close	User or system explicitly closes the session	Immediate
Assumed Close (Inactivity Timeout)	Session is assumed closed after 3 hours of inactivity	After 3h

Intent Scheduler and Pipeline Execution

The Intent Scheduler runs every 3 hours to evaluate pipeline execution conditions. The scheduler determines whether to process a single session on the first run or multiple sessions in a batch on subsequent runs.

The Intent Pipeline processes sessions to generate intents. Typical duration is 4–5 hours, but can take up to 24 hours.

Parameter	Value
Scheduler Frequency	Every 3 hours
Typical Duration	4-5 hours
Maximum Duration	24 hours

Intent Clustering Trigger

After the Intent Pipeline generates intents, the system waits 12 hours before triggering the Clustering Pipeline. This delay allows sufficient sessions with generated intents to accumulate for meaningful clustering analysis.

Trigger Condition	Description
First Successful Intent Pipeline Run	Intent pipeline completes its first run and generates intents

The clustering pipeline groups intents by shared user objective across multiple sessions. Pipeline duration can take up to 24 hours. The system evaluates data sufficiency by counting sessions with generated intents.

When insufficient data is available, the system waits for more sessions to accumulate intents before attempting clustering again.

Parameter	Value
Maximum Duration	Up to 24 hours
Typical Sessions for Intent Generation	5–7 sessions
Data Sufficiency Target for Clustering	50 sessions with intents
Insufficient Data Action	System waits for more session intents

Troubleshoot Agent Optimization

Resolve common issues with Agent Optimization, including setup problems, data display issues, and performance concerns.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Use these troubleshooting steps to diagnose and resolve issues with Agent Optimization. For more information about how intents work, see [Use Intents in Agent Optimization](#).

Common Issues with Intent Generation and Pipeline Execution

If intents aren't generating or clustering isn't occurring, verify that each stage completed successfully and data sufficiency requirements are met.

Issue	Possible Cause	Resolution
Intents not generating	Session hasn't closed or been assumed closed. Intent pipeline hasn't been triggered by scheduler.	Wait for the session to close explicitly or reach a 3-hour inactivity timeout.
Clustering not occurring	Insufficient sessions with intents (typically 50 sessions, varies by data), or 12-hour wait period hasn't elapsed.	Wait for more sessions to complete intent generation. Verify 12-hour wait period passed since first successful intent pipeline run.
Extended processing time	High data volume or system resource constraints.	Allow up to 24 hours for pipeline completion. Monitor system resources and data volume.
Intent generation taking longer than	Limited session data available.	Typically 5–7 sessions provide sufficient data, but varies. Allow more sessions to

Issue	Possible Cause	Resolution
expected		accumulate if initial attempts are unsuccessful.

Data Model for Agent Optimization

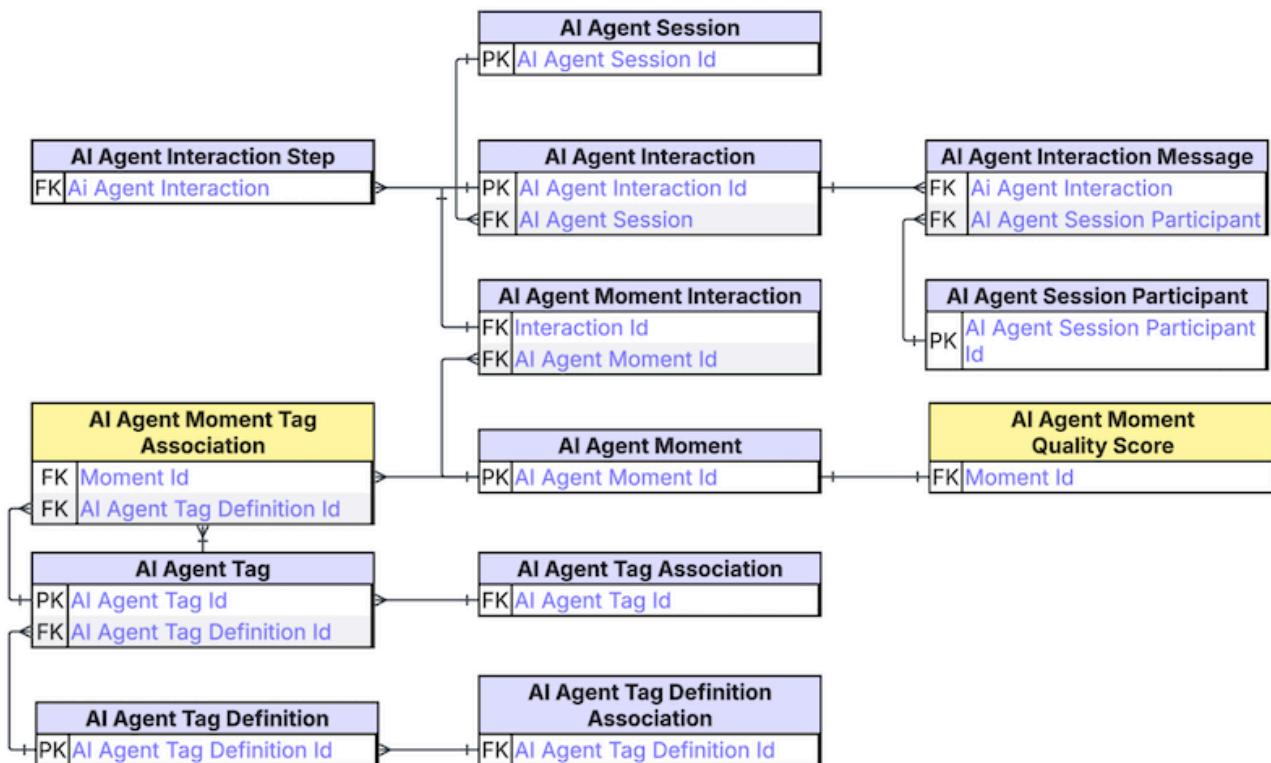
Agent Optimization extends Session Tracing Data Model (STDM) capabilities by provisioning additional DLOs and DMOs that track session moments and user intent. An LLM identifies, clusters, and tags these moments, enabling targeted queries and insights into user engagement metrics, moment duration, and response relevance quality scores.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Agent Optimization DLOs and DMOs

When you enable Agent Optimization, the system provisions the following Data Lake Objects (DLOs) and Data Model Objects (DMOs) to track agent interactions and moments.



DLO/DMO	Description
<code>AiAgentMoment</code>	Represents a group of consecutive interactions that share the same intent, collectively forming a coherent moment within the user experience.
<code>AiAgentMomentInteraction</code>	A junction object indicating which interactions are part of a given moment.
<code>AiAgentTagDefinition</code>	Defines a tag type that can be used to annotate AI agent moments or sessions, including metadata such as the tag's name, type, or category.
<code>AiAgentTagDefinitionAssociation</code>	Associates a tag definition with a specific AI agent, indicating which tags are available for use by that agent.
<code>AiAgentTag</code>	Represents an instance of a tag definition with a specific value applied to a particular moment or session.
<code>AiAgentTagAssociation</code>	Associates a tag with a specific moment or session, enabling structured annotation for analysis or filtering.

Agent Optimization Calculated Fields

Query different performance aspects and calculate session metrics. Session tracing makes it easier to get granular insights when you join several calculated fields together. For example, you can check your agent performance in specific session moments by combining the "Unique Moments" and "Average Quality Score" fields. The "Average Quality Score" field refers to how relevant an agent's response was to a user's request.

Dimensions are categorical or descriptive attributes that allow you to slice, filter, and group your data. For example, segmenting your agent performance data by time periods, status types, or quality categories.

Dimensions

Field Name	Description
<code>Abandonment_Status_clc</code>	Indicates whether a user has left the session.
<code>Agent_Interaction_Latency_clc</code>	The time it takes the agent to respond to the user's request in milliseconds.
<code>Deflection_Status_clc</code>	The deflection status, indicating if the session ended at the user's request.
<code>Engagement_Status_clc</code>	Specifying if a user received a reply based on an agent triggered action. An agent action is a predefined step within a topic workflow.
<code>Escalation_Status_clc</code>	Specifying whether the escalation is a result of a session being moved to a different agent.

Field Name	Description
Is_Session_Ended_clc	Specifying if the session has ended.
Is_User_clc	Specifying if the entity is an agent or a user.
Moment_Duration_clc	The Moment duration in seconds.
Quality_Score_clc	A quality score, ranging from 1 (lowest) to 5 (highest), that indicates how relevant the agent's response was to the user's request.
Session_Duration_clc	The session duration in seconds.

Measures are quantitative values that can be aggregated, calculated, or compared. They represent the key performance indicators and metrics used to evaluate agent performance, such as counts, rates, averages, and percentages.

Measures

Field Name	Description
Abandonment_Rate_clc	The abandonment rate percentage, calculated by dividing the number of abandoned sessions by all sessions.
Abandoned_Sessions_clc	The number of sessions where the user left because of an error, browser crash, or timeout.
Average_Agent_Interaction_Latency_clc	The average time it takes the agent to respond to the user's request in milliseconds.
Average_Interactions_Per_Session_clc	The average number of interactions per session.
Average_Moment_Duration_c1c	The average Moment duration in seconds.
Average_Quality_Score_c1c	An average score, ranging from 1 (lowest) to 5 (highest), that indicates how relevant the agent's response was to the user's request across multiple sessions.
Average_Session_Duration_clc	The average session duration in seconds.
Average_User_Interactions_clc	The average number of user interactions across all sessions.
Deflection_Rate_clc	The deflection rate percentage, calculated by dividing the number of deflected sessions by all sessions.
Deflected_Sessions_clc	The number of sessions ended by the user or otherwise, but not by escalation/abandonment.

Field Name	Description
<code>Engagement_Rate_clc</code>	The engagement rate percentage, calculated by dividing the number of engaged sessions by the number of sessions.
<code>Engaged_Sessions_clc</code>	The number of sessions where the user received a reply based on an agent triggered action. An agent action is a predefined step within a topic workflow.
<code>Escalation_Rate_clc</code>	The escalation rate percentage, calculated by dividing the number of escalated sessions by all sessions.
<code>Escalated_Sessions_clc</code>	The number of sessions where an agent escalated a session to a human or a different agent.
<code>Quality_Score_Reasoning_lc</code>	The explanation for an assigned quality score.
<code>Success_Rate_clc</code>	The success rate calculated as the percentage of interactions where an agent's action-based response was provided, out of all interactions.
<code>Unique_Interactions_clc</code>	The number of distinct user and agent interactions recorded within a defined timeframe. One interaction is considered as a user's request plus an agent's response.
<code>Unique_Moments_clc</code>	The number of distinct Moments recorded within a defined timeframe. Each moment aggregates multiple user and agent interactions centered on a specific request.
<code>Unique_Sessions_clc</code>	The number of distinct sessions recorded within a defined timeframe. A session includes the entire exchange between a user and an agent.
<code>Unique_Tags_clc</code>	The number of unique tags created within a defined timeframe.
<code>Unique_Users_clc</code>	The number of distinct users interacting with the agent within a defined timeframe.

Analyze Data with Agent Optimization

Use Agent Optimization to drill into sessions, analyze quality scores, and identify patterns to improve your agent's performance.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Access and view Agentforce Optimization

Assign the Access Agentforce Optimization and Data Cloud User permission sets

Agent Optimization helps you analyze both voice and chat sessions, view raw and processed session data, filter by modality, and track quality scores to improve your agent's performance.

! **Important** If Agent Optimization isn't available, ensure that both **Agentforce Session Tracing and Data Model** and **Agent Optimization** are enabled in **Setup | Einstein Audit, Analytics, and Monitoring Setup**. For setup instructions, see [Set Up Agent Optimization](#).

In Agentforce Studio, under **Optimization**, select **Insights**.

Use the Insights view for a view of key metrics to help you monitor your agent's overall performance. Use the filters to view data by agent and modality type (Voice, Chat, or All).

Insights Dashboard

The dashboard provides a comprehensive view of your agent's effectiveness, including:

- Performance metrics including Total Sessions, Average Agent Latency, and Average Quality Score. **Total Sessions** shows the total count of all sessions, including sessions with complete insights and those still processing. **Quality scores** are calculated by an external LLM that evaluates how well your agent responds to user requests on a scale from 1 (lowest) to 5 (highest). This scoring system helps you identify which interactions need improvement and track your agent's performance over time.
- Visualizations of how quality scores are distributed across topics and intents, helping you identify which areas your agent handles well and which need improvement.
- View of top and bottom performing topics and intents ranked by quality score. For example, you might see that your agent excels at handling contact record summaries but struggles with general inquiries.

Work with the Sessions and Intents Page

Go to the Sessions & Intents page to filter, analyze, and export session data for both voice and chat interactions.

The page provides powerful tools to analyze your agent's interactions and is divided into Processed and Unprocessed Sessions. Key metrics populate the columns including Intent Summary, Response Summary, Intent Tags, Quality Score, actions performed by the agent, and more.

- Filter sessions by modality:** Use the modality filter to view sessions by type: Voice, Chat, or All Modalities.
- Processed and Unprocessed Sessions:** The page is divided into **two distinct views**. Processed Sessions have passed through the optimization pipeline, where the system extracts and analyzes customer intents for insights and assigns quality scores. Unprocessed Sessions have not yet gone through the pipeline and may include active sessions or recently closed sessions. For more information about intent processing, see [Use Intents in Agent Optimization](#).

The screenshot shows the Agentforce Studio interface with the 'Sessions & Intents' tab selected. The left sidebar has sections for 'Build' (Agents, Tests, Prompt Templates, Data, AI Models) and 'Observe' (Analytics, Optimization Insights, Consumption Cards). The main area displays 'Processed Sessions - Sorted by Timestamp'. A search bar at the top right is empty. The table has columns: Session ID, Timestamp, Session Duration, Intent Summary, Response Summary, Topics, Agent Actions, Intent Tag, Quality Score, and Quality Score Reason. There are four rows of session data:

Session ID	Timestamp	Session Duration	Intent Summary	Response Summary	Topics	Agent Actions	Intent Tag	Quality Score	Quality Score Reason
Y890KRTU000 KF3bPBG	3:22:47 PM, Jun 1, 2025	45 sec	I want to book an SUV for Queenstown, New Zealand on the 14th of August and confirm the booking.	The agent provided a list of available SUVs, confirmed the user's choice of the Nissan X-Trail, and completed the booking. It also informed the user that the Nissan X-Trail does not include snow chains and provided alternative options that do.	Vehicle Availability Check	Check Vehicle Availability Find customer based on email CarRentalagent Confirm Car Rental	Car Rental Inquiries and Bookings	Medium	The agent provided a clear and accurate response to the user's request.
JUFDG876553 2QJD5689	3:03:12 PM, Jun 1, 2025	3 min, 32 sec	I want information on car rental company operations and a 50% discount.	The agent declined to provide specific company operational details or a discount, and redirected the user to ask about car rental needs.	Off Topic	NULL	Vehicle Features and Preferences	Very Low	The agent did not fulfill the user's repeated request to speak to a live agent and not resolve the user's issue leading to user frustration.
			Do you have any recommendations on where to eat dinner in Prague?	The agent provided five dining recommendations in Prague, including details about each restaurant.	Off Topic	NULL	Recommendations	High	The agent provided a comprehensive list of dining options, fully addressing the user's request.
GHIUT5RTU000 OKF3bPBG	8:45:12 AM, Jun 1, 2025	1 min, 12 sec	Where is my discount?	The agent confirmed an 11% discount on the rental.	Rates	NULL	Asks for discount	High	The agent addressed the user's query directly and provided the discount information.
			I need to cancel my order. My email is mark.williams@gmail.com	The agent identified two orders associated with the email and asked for the specific order number to cancel.	Order Management	NULL	Cancellation Request	Low	The agent did not provide the user a detailed response about the Cancellation Policy.
			What vehicles do you have?	The available vehicles at the current location are: 1 Truck, 4 SUVs, 6 Sedans, and 2 Convertibles, with	Vehicle Availability Check	NULL	Car Model Inquiries	Low	The agent did not provide any response to the user's request.

- Session Timeframe Range:** View and filter sessions from the last 24 hours.
- Transcript Export:** Download single or multiple session transcripts (up to 100) in CSV format.
- Duration Metrics:** Track performance via duration metrics. Chat logs display a total session duration at the top and specific duration calculations for every agent response.

Note Duration metrics are currently only available for Chat sessions.

Review Voice Sessions

Drill into voice sessions to listen to recordings and analyze voice-based interactions.

Agent Optimization supports voice agents. You can drill into any voice session and listen to the recording using the integrated audio player directly from the Sessions page.

Click into any session to view its data and play back audio for voice-based interactions. The voice session log displays the complete conversation transcript alongside the audio playback controls.

Dive into Specific Intents

From the Processed Sessions tab, you can drill into specific intents to identify patterns and opportunities in your agent's interactions.

The table displays key metrics for each interaction including Intent Summary, Response Summary, Intent Tags, Quality Score, actions performed by the agent, and more. You can also view intents and their performance from within the session trace view.

- Note** The intent scheduler runs every 3 hours. Intent generation typically takes 4–5 hours, while clustering runs daily and new tags are created weekly. For more information, see [Use Intents in Agent Optimization](#).

Debug and Optimize from the Session Page

Deep-dive into specific interactions to understand what happened during user conversations and identify areas for improvement.

Click on a session to open the Session Page and deep-dive into that specific interaction. The Session Page shows you exactly what happened during a user's conversation with your agent, helping you understand and fix issues.

Unprocessed Session View: For sessions still active or those that haven't completed the intent pipeline, you see a "Session processing in progress" banner. Switch to the **Trace** tab to view the full session trace.

Unprocessed Session View

The screenshot shows the Agentforce Studio interface with the 'Sessions & Intents' tab selected. A session is open with ID Y890KRTU000KF3bPBG. A banner at the top states: "Session processing in progress. Intent insights usually populate within a few hours. In the meantime, select any agent response to see its trace. [Learn More](#)". The session log shows the following interaction:

- User: Chat initiated by User - 9:01:14 AM
- Agent: Hi - 9:02:04 AM
- User: Hi there! Thank you for contacting Outdoor Unlimited Customer Support. How can I assist you today?
- Agent: (Complete: less than 1 sec)
- User: Hi, I have a question about your cancellation policy.
- Agent: Sure! Our cancellation policy is available on our website. Let me know if you need anything else.
- Agent: (Complete: 7 sec)
- User: Yeah, my order number is #9876543210, and my email is mark.williams@gmail.com
- Agent: Thanks, Mark! It looks like your order is still processing but hasn't shipped yet. Instead of canceling, would you like to modify it? I can help update the quantity, swap items, or adjust the order details.
- Agent: (Complete: 11 sec)
- User: Can I change the shipping address?
- Agent: (Complete: 1 sec)
- User: Chat ended by Car Rental service Agent - 9:04:38 AM

To the right of the session log, an "Interaction Summary" panel lists the session details:

- Topic: Order Management
- Action: Get User
- Agent: Sub-Agent
- Variable(s): 6 variables
- Retrieval: 1 document
- Action: Authenticate User
- Response: Messaging In App Web

Processed Session View: Once processing completes, the session log displays intents with quality score indicators. Click on an intent to view performance metrics, triggered topics and actions, and quality score reasoning.

Processed Session View

The screenshot shows the Agentforce Studio interface. At the top, there's a search bar and various icons. Below that, a tab bar has 'Sessions & Intents' selected. A specific session is highlighted with the ID 'Y890KRTU000KF3bPBG'. The main area displays a 'Chat Session Log' for April 16, 2025, at 9:01:14 AM. The log shows a conversation between a user and a 'Car Rental Service Agent'. The user asks about cancellation policy, and the agent provides details, including an order number and email. The session ends at 9:04:38 AM. To the right of the log, there's a summary section with metrics like 'Agent Name' (Car Rental Service Agent), 'Average Agent Latency' (134 ms), 'Total Interactions' (2 interactions), and 'Intent Duration' (1 min, 12 sec). Below these are sections for 'Topics Triggered' (# Order Management) and 'Actions Triggered' (Retrieve Knowledge). A callout box highlights the 'Average Agent Latency' metric.

Agent Analytics

Analyze your AI agents' performance within user and agent sessions. Agent Analytics is built on the unified Session Tracing Data Model (STDM), which captures every event and interaction within a session and logs it as individual events. You can query the logged events to gain insights and optimize the Agent.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Watch this video to learn how Agent Analytics and Agentforce Optimization work together to help you continuously refine and improve your AI agents.

Watch the video: <https://play.vidyard.com/7DfVkjIBRBiJoJpmhcAX8m>

Here are the steps and information required to analyze your AI agents' performance within user and agent sessions.

About Agent Analytics

Analyze the performance of your AI agents. Agent Analytics is a tool specifically designed for comprehensive session analysis. Built on the unified Session Tracing Data Model (STDM), it captures every turn and event occurring in and across all your agent sessions. You can then query the logged

events to gain insights and optimize agent performance.

Set Up Agent Analytics

Set up Agent Analytics to gain insights into agent performance, track conversation metrics, and optimize your agents with comprehensive dashboards and session insights.

Data Model and Calculated Fields for Agent Analytics

The data model for Agent Analytics is based on Session Tracing, which is a collection of DLOs (Data Lake Objects) and DMOs (Data Model Objects) that contain detailed session trace logs of agent behavior. The data model also includes references to every LLM call the reasoning engine makes to support joins with feedback data or guardrails metrics.

Get Insights with Agent Analytics Dashboards

Use the data from your Service Agent Analytics and Employee Agent Analytics dashboards to understand agent performance, and determine whether you want to adjust topics and agent actions to improve user satisfaction.

Troubleshoot Agent Analytics

If you're unable to see the information, models, dashboards, or metrics that you expect, try these solutions.

About Agent Analytics

Analyze the performance of your AI agents. Agent Analytics is a tool specifically designed for comprehensive session analysis. Built on the unified Session Tracing Data Model (STDM), it captures every turn and event occurring in and across all your agent sessions. You can then query the logged events to gain insights and optimize agent performance.

Agent Analytics provides significant architectural improvements over the legacy version. The data foundation has evolved from Data 360 objects based on copilot events to a unified model based on the Analytics Foundation data model. Existing users are advised to upgrade to Agent Analytics to ensure a seamless transition in the future and to gather sufficient data for insights and data queries.

See Also

[Billing Considerations for Agentforce Session Tracing](#)

[Implement Data Governance Permissions for Agentforce Session Tracing Objects](#)

Set Up Agent Analytics

Set up Agent Analytics to gain insights into agent performance, track conversation metrics, and optimize your agents with comprehensive dashboards and session insights.

REQUIRED EDITIONS

Required Editions

Agent Analytics is available in Salesforce Enterprise, Performance, and Unlimited Editions with Salesforce Foundations or Agentforce 1 Edition. Agent Analytics is available in sandbox and DC1

Required Editions

organizations.

 **Note** Agent Analytics is currently not supported in Government Cloud orgs.

USER PERMISSIONS NEEDED

To install Agent Analytics

One of the following permission combinations:

- System Administrator and Data Cloud Admin permission sets
- Agentforce Service Agent Configuration and Data Cloud Admin permission sets

To view and access Agent Analytics (Salesforce Foundations users)

- TabNext Limited Consumer
- Data Cloud User

To view and access Agent Analytics (Agentforce 1 and Agentforce for X users)

- Tableau Next Platform Analyst
- Data Cloud User

Additionally, admins should share specific workspaces with users to ensure visibility.

To view metrics

API Enabled permission

See Also

[Set Up Agentforce Session Tracing](#)

Setup Steps

1. Confirm that Data Cloud is provisioned and enabled in your Salesforce org, that you've turned on Einstein, and that you have an active agent.
2. Ensure that the relevant user permissions are assigned.
3. Verify that you have the latest version of the Salesforce Standard Data Model (version 1.124 or higher) in your org (sandbox or production). From Setup, go to **Apps -> Packaging -> Installed Packages -> Salesforce Standard Data Model**. To get the required version, click [here](#) and follow the instructions.
4. From Setup, go to **Einstein Audit, Analytics, and Monitoring Setup**.
5. Turn on **Agentforce Session Tracing**, if it's not already enabled.
Session Tracing also provisions the required Analytics data model entities to perform queries.
6. From Setup, go to **Agent Analytics**.
7. Install Service Agent Analytics.
 - a. Assign Agentforce Service Agent Configuration permission set.
 - b. Click **Install**.

8. Install Employee Agent Analytics.
 - a. Validate you have system admin access.
 - b. Click **Install**.
9. Install SDR Analytics. For more information, see [Set Up Sales Agent SDR Analytics](#).
10. Refresh the page to verify installation is complete.

Managing Agent Analytics App Statuses

On the Agent Analytics setup page, the options available for managing your app templates depend on the current version and installation status of each app. You can track the progress of operations—including updates, uninstalls, or reinstalls—in the Manage and Monitor section.

 **Important** Agent Analytics vs. Agent Optimization Installing an Agent Analytics app does not automatically connect or configure [Agent Optimization](#). The two are linked but configured separately.

- **Viewing analytics:** After installing an Agent Analytics app (such as Service Agent Analytics), go to Agentforce Studio to view the corresponding dashboard.
- **Configuring optimization:** Agent Optimization requires a separate manual configuration, including permission assignments such as the Access Agent Optimization permission set. See [Set Up Agent Optimization](#).

Transition from Legacy Agent Analytics

 **Important** If you're migrating from legacy analytics, additional steps are required.

Agent Analytics replaces the [Legacy analytics](#) version. Existing analytics users should complete the above steps, in addition to the following requirements. For more details, see [Transition from Legacy Analytics to Agent Analytics](#).

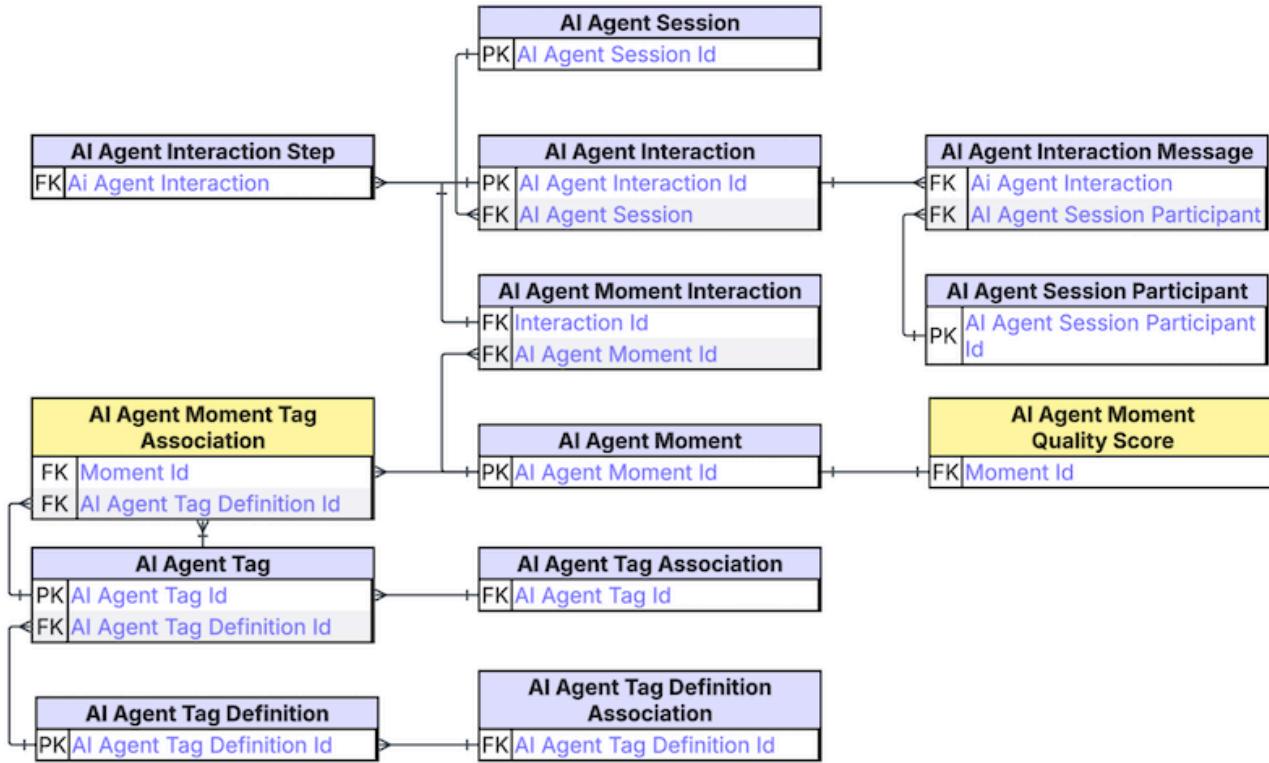
1. Transition from Agentforce (Default) to [Agentforce Employee Agent](#).
2. Transition existing automations (Flow, Apex, or Prompt) created on top of existing DLOs or DMOs to Agentforce Session Data Model or Einstein Feedback instead.
3. Transition existing custom reports or dashboards created on top of existing DLOs or DMOs to Agentforce Analytics Foundations Semantic Model or Einstein Feedback instead.
4. Once the above requirements are complete, turn off the legacy **Agent Analytics** toggle from [Einstein Audit, Analytics, and Monitoring Setup](#).

Data Model and Calculated Fields for Agent Analytics

The data model for Agent Analytics is based on Session Tracing, which is a collection of DLOs (Data Lake Objects) and DMOs (Data Model Objects) that contain detailed session trace logs of agent behavior. The data model also includes references to every LLM call the reasoning engine makes to support joins with

feedback data or guardrails metrics.

Analytics Data Model



Analytics Calculated Fields

The analytics semantic layer is the infrastructure that represents the link between the different entities of [session tracing](#) and their connection with the Analytics data entities. To view the model, in Data 360, go to the semantic model tab and open Agentforce Analytics Foundations. The Analytics Semantic Layer provides comprehensive calculated fields for querying session and agent performance data. For example, understand the relationship between **session duration and quality ratings** by combining `Session_Count`, and `Average_Session_Duration_clc` measures with the `Quality_Score_clc` dimension, or **track weekly or monthly performance trends** by combining the `Unique_Sessions_clc`, and `Abandonment_Rate_clc` measures with `Session_Date dimension`.

Measures and Dimensions

Measures are calculated numerical values that provide quantitative insights into agent performance, including engagement rates, deflection rates, escalation rates, abandonment rates, timing metrics like session duration and response latency, and aggregate counts of interactions, sessions, and users.

Dimensions are categorical fields used to group, filter, and segment this analytical data, providing status indicators and classifications such as abandonment status, engagement status, entity types (user vs. agent), and session states that enable analysts to slice and dice the quantitative measures across different categories for deeper performance analysis and targeted reporting.

Analytics also extends with intent-specific insights from [Agent Optimization](#). These insights include intent-level metrics, such as their duration and quality scores that measure the relevance of agent responses. Tags generated by the LLM help cluster and categorize these intents for deeper analysis of user engagement patterns.

Measures

Label	Field Name	Description
Abandonment Rate	Abandonment_Rate_clc	Abandonment rate percentage (abandoned sessions ÷ all sessions)
Abandoned Sessions	Abandoned_Sessions_clc	Number of sessions where users left due to error, browser crash, or timeout
Agent Messages	Agent_Messages_clc	The total number of messages sent by the agent
Agent Triggered Actions	Agent_Triggered_Actions_clc	The total number of agent-triggered actions across all sessions
Agent to User Message Ratio	Agent_User_Message_Ratio_clc	The ratio of agent messages to user messages across all sessions
Average Agent Interaction Latency	Average_Agent_Interaction_Latency_clc	Average agent response time in milliseconds
Average Answer Faithfulness Score	Average_Answer_Faithfulness_Score_clc	Average score (0-1) measuring how closely the agent's response adheres to grounded source data (such as knowledge base articles).
Average Answer Relevance Score	Average_Answer_Relevance_Score_clc	Average score (0-1) measuring the relevance of the agent's response to the user's request.

 **Note** To use this metric, in Setup, toggle on Audit and Feedback and Knowledge/RAG Quality Data and Metrics.

 **Note** To use this metric, in

Label	Field Name	Description
		Setup, toggle on Audit and Feedback and Knowledge/RAG Quality Data and Metrics.
Average Context Relevance Score	Average_Context_Relevance_Score_clc	<p>Average score (0-1) measuring whether the agent retrieved the correct data source to answer the user's question.</p> <p> Note To use this metric, in Setup, toggle on Audit and Feedback and Knowledge/RAG Quality Data and Metrics.</p>
Average Interactions Per Session	Average_Interactions_Per_Session_clc	Average number of interactions per session
Average Moment Duration	Average_Moment_Duration_clc	Average duration of an intent in seconds
Average Quality Score	Average_Quality_Score_clc	Average relevance score (1-5) of agent responses across sessions
Average Session Duration	Average_Session_Duration_clc	Average session duration in seconds
Average User Interactions	Average_User_Interactions_clc	Average number of user interactions across all sessions
Deflected Sessions	Deflected_Sessions_clc	Sessions ended by user (not by escalation or abandonment)
Deflection Rate	Deflection_Rate_clc	Deflection rate percentage (deflected sessions ÷ all sessions)
Engaged Sessions	Engaged_Sessions_clc	Sessions where user received reply based on agent-triggered action
Engagement Rate	Engagement_Rate_clc	Engagement rate percentage (engaged sessions ÷ all sessions)
Interaction Error Rate	Error_Rate_clc	The interaction error rate across

Label	Field Name	Description
		all sessions. Errors are only recorded for interactions that contain at least one action or LLM step.
Escalated Sessions	Escalated_Sessions_clc	Number of sessions escalated to human or different agent
Escalation Rate	Escalation_Rate_clc	Escalation rate percentage (escalated sessions ÷ all sessions)
Quality Score Reasoning	Quality_Score_Reasoning_clc	Explanation for assigned quality score
Success Rate	Success_Rate_clc	The percentage of agent interactions that included action steps and completed without errors
Unique Interactions	Unique_Interactions_clc	Number of distinct user and agent interactions recorded
Unique Moments	Unique_Moments_clc	Number of distinct intents recorded within defined time frame
Unique Sessions	Unique_Sessions_clc	Number of distinct sessions recorded within a time frame
Unique Tags	Unique_Tags_clc	Number of unique tags created within defined time frame
Unique Users	Unique_Users_clc	The number of unique users interacting with the agent. For Service Agents, this includes messaging end users; for other agent types, this counts users by session participant role.
User Messages	User_Messages_clc	The total number of messages sent by the user

Dimensions

Label	Field Name	Description
Abandonment Status	Abandonment_Status_clc	Indicates whether user left the session

Label	Field Name	Description
Agent Interaction Latency	Agent_Interaction_Latency_clc	Time for agent to respond to user request (milliseconds)
Deflection Status	Deflection_Status_clc	Indicates whether session ended at user's request
Engagement Status	Engagement_Status_clc	Indicates if user received reply based on agent action
Escalation Status	Escalation_Status_clc	Specifies if escalation moved session to different agent
Is Session Ended	Is_Session_Ended_clc	Indicates whether session has ended
Is Interaction With Errors	Is_Interaction_With_Errors_clc	Identifies interactions that encountered errors. Errors are only recorded for interactions that contain at least one action or LLM step.
Is User	Is_User_clc	Indicates whether entity is an agent or user
Moment Duration	Moment_Duration_clc	Duration of the intent in seconds
Quality Score	Quality_Score_clc	Relevance score (1-5) of agent response to user request
Session Duration	Session_Duration_clc	Session duration in seconds

Calculated Field Formulas

The following formulas define how key calculated fields are computed from the underlying data model.

Measure Formulas

Label	Field Name	Formula
Abandonment Rate	Abandonment_Rate_clc	[Abandoned_Sessions_clc] / [Unique_Sessions_clc]
Abandoned Sessions	Abandoned_Sessions_clc	COUNTD(IF [Abandonment_Status_clc] THEN [AI_Agent_Session].[AI_Agent_Session_Id] END)

Label	Field Name	Formula
Agent Messages	Agent_Messages_clc	<pre>COUNTD(IF [AI Agent Session Participant].[AI Agent Session Participant Role] = "AGENT" THEN [AI Agent Interaction Message].[AI Agent Interaction Message Id] ELSE NULL END)</pre>
Agent Triggered Actions	Agent_triggered_Actions_clc	<pre>COUNTD(IF [AI Agent Interaction Step].[Ai Agent Interaction Step Type] = "ACTION_STEP" THEN [AI Agent Interaction Step].[AI Agent Interaction Step Id] ELSE NULL END)</pre>
Agent to User Message Ratio	Agent_User_Message_Ratio_clc	$\frac{[\text{Agent_Messages_clc}]}{[\text{User_Messages_clc}]}$
Average Agent Interaction Latency	Average_Agent_Interaction_Latency_clc	$\text{AVG}(\text{IF } [\text{AI_Agent_Interaction}].[\text{Ai_Agent_Interaction_Type}] = \text{'TURN'} \text{ THEN } [\text{Agent_Interaction_Latency_clc}] \text{ END})$
Average Answer Faithfulness Score	Average_Answer_Faithfulness_Score_clc	$\text{AVG}(\text{IF NOT ISNULL}([\text{AI Agent Interaction}].[\text{Telemetry Trace}]) \text{AND } [\text{AI Agent Interaction}].[\text{Telemetry Trace}] != \text{'NOT_SET'})$

Label	Field Name	Formula
		<pre> THEN [AI Retriever Quality Metric].[Faithfulness Relevancy Score] END) </pre>
Average Answer Relevance Score	Average_Answer_Relevance_Score_clc	<pre> AVG (IF NOT ISNULL([AI Agent Interaction].[Telemetry Trace]) AND [AI Agent Interaction].[Telemetry Trace] != 'NOT_SET' THEN [AI Retriever Quality Metric].[Answer Relevancy Score] END) </pre>
Average Context Relevance Score	Average_Context_Relevance_Score_clc	<pre> AVG (IF NOT ISNULL([AI Agent Interaction].[Telemetry Trace]) AND [AI Agent Interaction].[Telemetry Trace] != 'NOT_SET' THEN [AI Retriever Quality Metric].[Context Precision Score] END) </pre>
Average Interactions Per Session	Average_Interactions_Per_Session_clc	<pre> AVG(IF [Is_Session_Ended_clc] THEN {FIXED[AI_Agent_Session].[AI_Agent_Session_Id]:[Unique_Interactions_clc]} END) </pre>
Average Moment Duration	Average_Moment_Duration_clc	<pre> AVG ([Moment_Duration_clc]) </pre>
Average Quality Score	Average_Quality_Score_clc	<pre> AVG ([Quality_Score_clc]) </pre>

Label	Field Name	Formula
Average Session Duration	Average_Session_Duration_clc	AVG ([Session_Duration_clc])
Average User Interactions	Average_User_Interactions_clc	AVG(IF [Is_User_clc] THEN { FIXED [AI_Agent_Session_Participant].[Participant] : [Unique_Interactions_clc] } END)
Deflected Sessions	Deflected_Sessions_clc	COUNTD(IF [Deflection_Status_clc] THEN [AI_Agent_Session].[AI_Agent_Session_Id] END)
Deflection Rate	Deflection_Rate_clc	[Deflected_Sessions_clc]/[Unique_Sessions_clc]
Engaged Sessions	Engaged_Sessions_clc	COUNTD(IF [Engagement_Status_clc] THEN [AI_Agent_Interaction].[AI_Agent_Session] END)
Engagement Rate	Engagement_Rate_clc	[Engaged_Sessions_clc]/[Unique_Sessions_clc]
Interaction Error Rate	Error_Rate_clc	COUNTD(IF [Is_Interaction_With_Error_clc] THEN [AI Agent Interaction].[AI Agent Interaction Id] END) / [Unique_Interactions_clc]
Escalated Sessions	Escalated_Sessions_clc	COUNTD(IF [Escalation_Status_clc] THEN [AI_Agent_Session].[AI_Agent_Session_Id] END)

Label	Field Name	Formula
Escalation Rate	Escalation_Rate_clc	[Escalated_Sessions_clc]/[Unique_Sessions_clc]
Success Rate	Success_Rate_clc	<pre> COUNTD(IF [Is_Interaction_Engaged_clc] AND NOT [Is_Interaction_With_Errors_clc] THEN [AI Agent Interaction].[AI Agent Interaction Id] END) / [Unique_Interactions_clc] </pre>
Unique Interactions	Unique_Interactions_clc	<pre> COUNTD(IF [AI_Agent_Interaction].[Ai_Agent_Interaction_Type] = 'TURN' THEN [AI_Agent_Interaction].[AI_Agent_Interaction_Id] END) </pre>
Unique Moments	Unique_Moments_clc	COUNTD([AI_Agent_Moment].[AI_Agent_Moment_Id])
Unique Sessions	Unique_Sessions_clc	COUNTD([AI_Agent_Session].[AI_Agent_Session_Id])
Unique Tags	Unique_Tags_clc	COUNTD([AI_Agent_Tag].[AI_Agent_Tag_Id])
Unique Users	Unique_Users_clc	<pre> COUNTD(IF [Is_User_clc]=TRUE THEN [AI Agent Session Participant].[Participant] END) </pre>

Label	Field Name	Formula
User Messages	User_Messages_clc	<pre>COUNTD(IF [Is_User_clc] THEN [AI Agent Interaction Message].[AI Agent Interaction Message Id] ELSE NULL END)</pre>

Dimension Formulas

Label	Field Name	Formula
Abandonment Status	Abandonment_Status_clc	<pre>IF [Is_Session_Ended_clc] AND { FIXED [AI_Agent_Session].[AI_Agent_Session_Id] : MAX([Deflection_Status_clc]) }=FALSE AND { FIXED [AI_Agent_Session].[AI_Agent_Session_Id] : MAX([Escalation_Status_clc]) }=FALSE THEN TRUE ELSE FALSE END</pre>
Agent Interaction Latency	Agent_Interaction_Latency_clc	<pre>DATEDIFF('MILLISECONDS', [AI_Agent_Interaction].[Start_Timestamp], [AI_Agent_Interaction].[End_Timestamp])</pre>
Deflection Status	Deflection_Status_clc	<pre>IF [AI_Agent_Interaction_Step].[Ai_Agent_Interaction_Step_Type] = 'SESSION_END' AND ([AI_Agent_Interaction_Step].[Name] = 'CLOSED_USER_REQUEST' OR [AI_Agent_Interaction_Step].[Name] = 'CLOSED_ACTION') THEN TRUE ELSE FALSE END</pre>
Engagement Status	Engagement_Status_clc	<pre>{ FIXED [AI Agent Session].[AI Agent Session Id] : MAX(</pre>

Label	Field Name	Formula
		<pre>IF [Is Interaction Engaged] THEN TRUE ELSE FALSE END) }</pre>
Escalation Status	Escalation_Status_clc	<pre>{ FIXED [AI Agent Session].[AI Agent Session Id] : MAX(IF [AI Agent Interaction Step].[Ai Agent Interaction Step Type]='SESSION_END' AND [AI Agent Interaction Step].[Name]='CLOSED_TRANSFERRED' THEN TRUE ELSE FALSE END) }</pre>
Is Interaction With Errors	Is_Interaction_With_Errors_clc	<pre>{ FIXED [AI Agent Interaction].[AI Agent Interaction Id] : MAX(IF NOT ISNULL([AI Agent Interaction Step].[Error Message]) AND LEN(TRIM([AI Agent Interaction Step].[Error Message])) > 0 AND [AI Agent Interaction Step].[Error Message] != "NOT_SET" THEN TRUE ELSE FALSE END) }</pre>
Is Session Ended	Is_Session_Ended_clc	<pre>{ FIXED [AI Agent Session].[AI Agent Session Id] : MAX(IF [AI Agent Interaction].[Ai Agent Interaction Type]='SESSION_END' THEN TRUE ELSE FALSE END) }</pre>

Label	Field Name	Formula
		<pre> N_END' OR DATEDIFF('HOUR', { FIXED [AI Agent Session].[AI Agent Se ssion Id] : MAX([AI A gent Interaction].[End Timestam p]) }, NOW()) >= 24 THEN TRUE ELSE FALSE END) } </pre>
Is User	Is_User_clc	<pre> IF [AI Agent Session Participant].[AI Agent Session Participant Role]='USER' AND ([AI Agent Session Participant].[Participant Object] = 'Mess agingEndUser' OR NOT ([AI Agent Session Participant].[AI Agent Type] IN ('Ei nsteinServiceAgent', 'Agentfor eServiceAgent'))) THEN TRUE ELSE FALSE END </pre>
Moment Duration	Moment_Duration_c lc	<pre> DATEDIFF('SECOND', [AI_Agent_Mo ment].[Start_Timestamp], [AI_Ag ent_Moment].[End_Timestamp]) </pre>
Quality Score	Quality_Score_clc	<pre> INT([AI Agent Moment Relevance Score].[AI Agent Tag.Value]) </pre>

Label	Field Name	Formula
Session Duration	Session_Duration_c	<pre> { FIXED [AI Agent Session].[AI Agent Session Id] : MAX(IF [Is Session Ended] THEN DATEDIFF('SECOND', { FIXED [AI Agent Session].[AI Agent Session Id] : MIN(IF [AI Agent Interaction].[Ai Agent Interaction Type]='TURN' THEN [AI Agent Interaction].[Start Timestamp] END) }, { FIXED [AI Agent Session].[AI Agent Session Id] : MAX(IF [AI Agent Interaction].[Ai Agent Interaction Type]='TURN' THEN [AI Agent Interaction].[End Timestamp] END) }) END) })) </pre>

Get Insights with Agent Analytics Dashboards

Use the data from your Service Agent Analytics and Employee Agent Analytics dashboards to understand agent performance, and determine whether you want to adjust topics and agent actions to improve user satisfaction.

REQUIRED EDITIONS

Required Editions

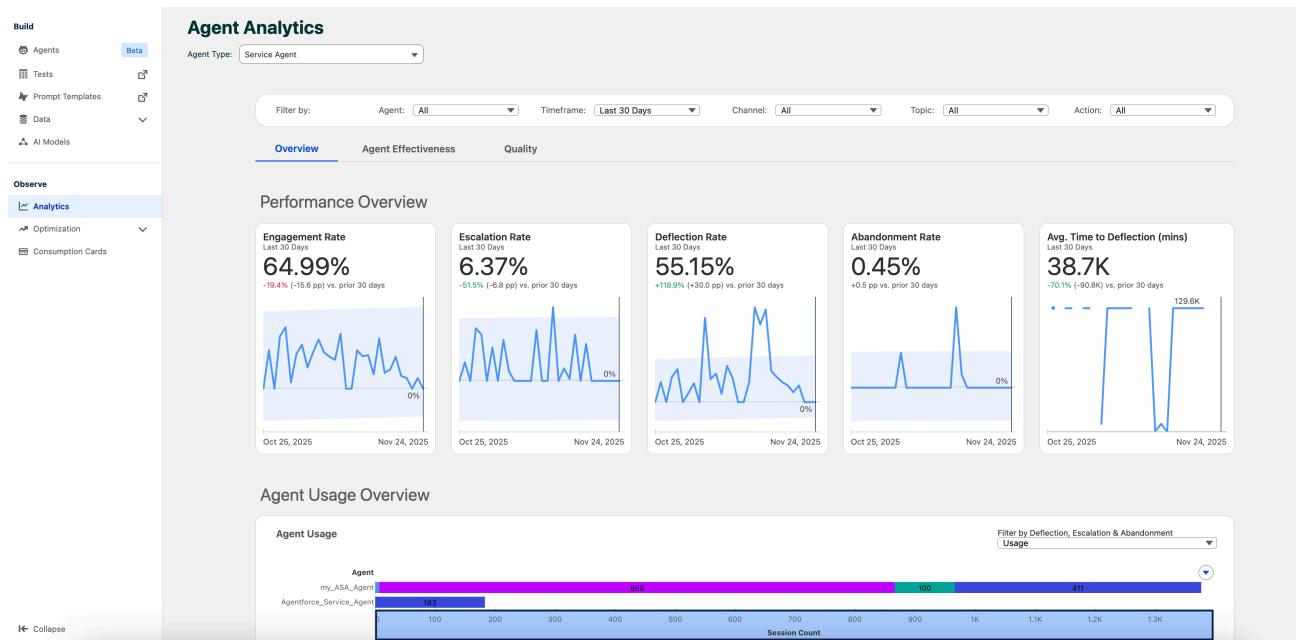
Agent Analytics is available in Salesforce Enterprise, Performance, and Unlimited Editions with Salesforce Foundations or Agentforce 1 Edition. Agent Analytics is available in sandbox and DC1 organizations.

Required Editions

 Note Agent Analytics is currently not supported in Government Cloud orgs.

Service Agent Analytics Dashboard

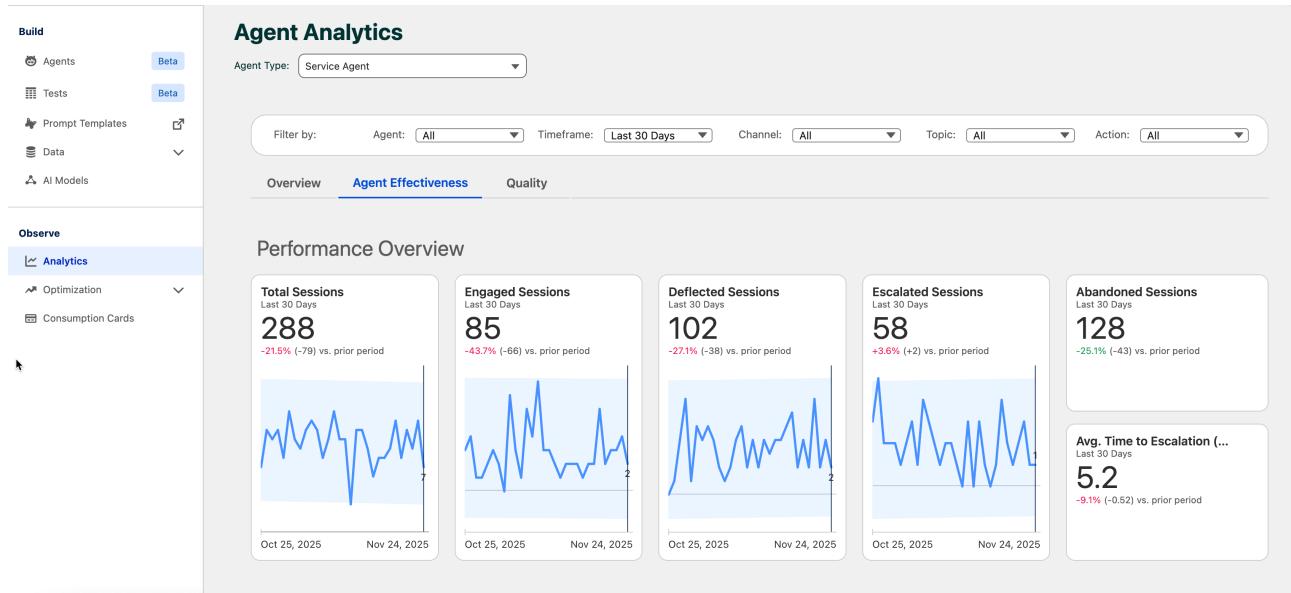
Access the dashboards from the Agentforce Studio Analytics tab. Then, select your agent from the dropdown menu. The Service Agent Analytics dashboard provides insights into customer-facing agents, helping you track customer engagement, deflection rate, and additional metrics. Use this dashboard to optimize agents that interact with external customers.



In the Service Agent Analytics dashboard, filter the content and views by Agent, Timeframe, Channel, Topic, or Action. The dashboard includes three tabs: Overview, Agent Effectiveness, and Quality.

Agent Effectiveness Tab:

The Agent Effectiveness tab provides detailed metrics about agent performance. View session trends over time, understand session outcomes, and get detailed info for specific sessions.



METRIC	DESCRIPTION
Total Sessions	Sum of all sessions, including escalated, abandoned, and deflected sessions.
Engaged Sessions	Sum of engaged sessions where customers interacted with Service Agents.
Deflected Sessions	Sum of sessions that were successfully deflected without escalation.
Escalated Sessions	Number of sessions that were escalated to a higher level of support.
Abandoned Sessions	Number of abandoned sessions (sessions that timed out without engagement). The default session timeout is two hours.
Avg Time to Escalation	The average time (in minutes) for sessions to be escalated to a higher level of support.

Note A session is considered engaged only when at least one action has been triggered.

Quality Tab:

The Quality tab provides metrics about agent response quality. Monitor the average quality score over time and compare quality scores across different agents to identify areas for improvement.

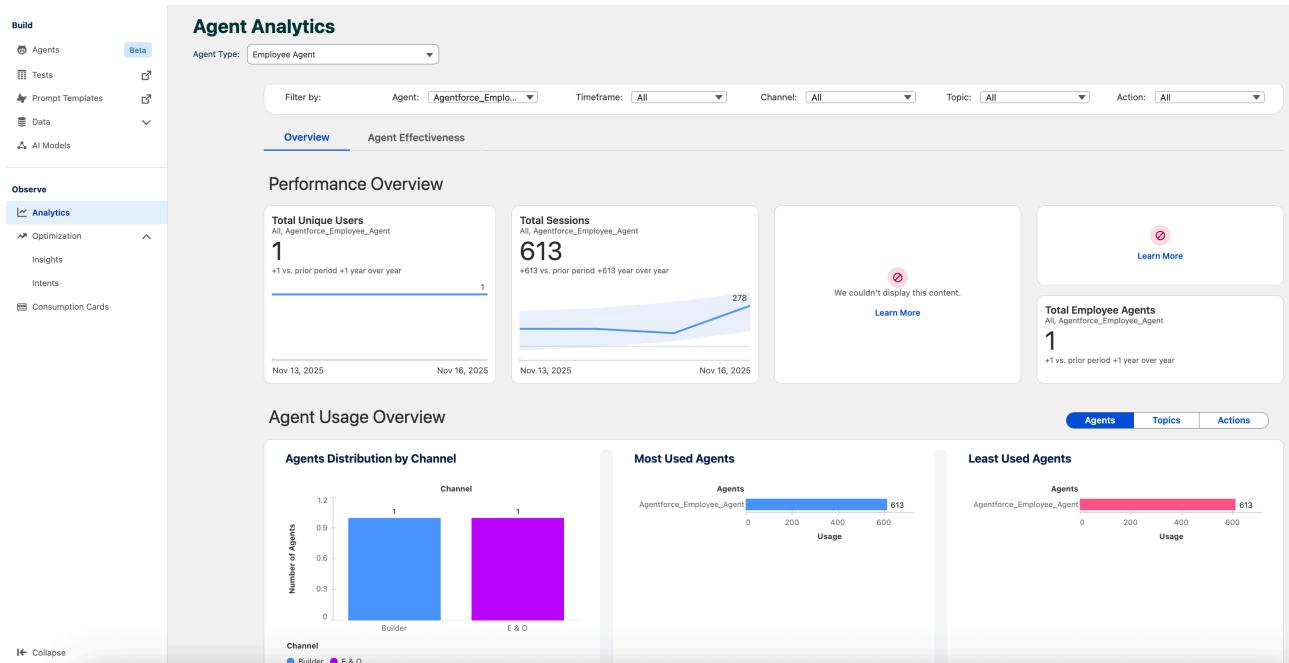
Quality scores are calculated by an external LLM that evaluates how well your agent responds to user requests on a scale from 1 (lowest) to 5 (highest). This scoring system helps you identify which interactions need improvement and track your agent's performance over time.

METRIC	DESCRIPTION
Average Quality Score	The overall quality score averaged across all agent interactions over

METRIC	DESCRIPTION
	the selected timeframe.
Average Quality Score by Agent	A comparison chart showing the average quality score for each individual agent, helping identify high and low performers.

Employee Agent Analytics Dashboard

Use your Employee Agent Analytics dashboard to gain insights into employee-facing agents and track internal adoption, productivity, and effectiveness.



Filter the content and views by Agent, Timeframe, Topic, or Action. Review key insights and metrics to understand how employees are engaging with agents and identify opportunities to enhance agent performance and drive adoption.

Troubleshoot Agent Analytics

If you're unable to see the information, models, dashboards, or metrics that you expect, try these solutions.

Troubleshoot Agent Analytics

Issue	Solution
Agent Analytics Semantic Model isn't available.	Ensure Agentforce Session Tracing is enabled.
Data isn't displayed in your demo or trial org.	Ensure Agentforce Session Tracing is enabled.

Issue	Solution
The dashboard displays an error stating that the admin has disabled report creation or the relationships have changed.	Clone the dashboard and see if the problem is resolved.
Agent Analytics dashboards are not visible on the Agent Analytics page.	<p>Verify that your org has Tableau Next Platform, which is required to view Agent Analytics dashboards. Tableau Next Platform is included in Salesforce Foundations with flex credits.</p> <p>If you don't have Tableau Next Platform:</p> <ul style="list-style-type: none"> Check if your org has Salesforce Foundations enabled. If not, activate Salesforce Foundations. If you have Agentforce enabled prior to May 2025 and are on the conversation credits consumption model, you need the new Salesforce Foundations with flex credits SKU (that includes Tableau Next). Contact your Account Executive to swap your legacy Foundations license for Salesforce Foundations - Entitlements - Flex Credits or Salesforce Foundations - Entitlements - Conversations (if you don't intend to migrate to Flex). Alternatively, purchase Tableau Next separately.
Tableau Next Limited Consumer license is not visible in the Permission Set page.	<p>The Tableau Next Limited Consumer license is included with Salesforce Foundations and provides the ability to access and view Agent Analytics dashboards.</p> <p>If you don't see this permission set:</p> <ul style="list-style-type: none"> Verify that your org has Salesforce Foundations. If not, activate Salesforce Foundations. If you have Agentforce enabled prior to May 2025 and are on the conversation credits consumption model, you need the new Salesforce Foundations with flex credits SKU (that includes Tableau Next). Contact your Account Executive to swap your legacy Foundations license for Salesforce Foundations - Entitlements - Flex Credits or Salesforce Foundations - Entitlements - Conversations.

Issue	Solution
	Foundations - Entitlements - Conversations (if you don't intend to migrate to Flex).
Installed analytics apps are not appearing in the Agentforce Studio app or on the Agent Analytics Setup page.	<p>Analytics apps have specific prerequisites that must be met to appear in your org. If one or more prerequisites are disabled, installed apps will not be visible even though they remain installed.</p> <p>Common prerequisites include:</p> <ul style="list-style-type: none"> • Agentforce Session Tracing: Required for all analytics apps to collect and store session data. • Agent-specific settings: Some apps require additional settings. For example, Employee Agent Analytics requires the Employee Agent feature to be enabled in your org. <p>For more information, see Set Up Agentforce Session Tracing and Set Up Agent Analytics.</p>
An app shows Failed to Install . When the app allows only one instance per Data Space , the Reinstall option appears instead of Update or Reconfigure .	Select Reinstall . This removes the previous failed instance and attempts a new installation in the same Data Space. Without Reinstall , you would need to manually uninstall the failed app and delete the associated logs before installing again.
Data isn't displayed in your demo or trial org.	Ensure Agentforce Session Tracing is enabled.
User can't view metrics.	Make sure that the user is assigned the API Enabled permission.

Legacy Agentforce Analytics

Legacy Agentforce Analytics uses Data 360 to help you gain insights into how your agents are performing. The insights in your customizable dashboard and reports can help you determine whether you want to change anything to drive adoption or adjust topics and actions to improve user satisfaction.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. [Required add-on licenses vary by agent type](#).

! **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

! **Note** This Analytics version is scheduled for retirement starting April 2026. We recommend using [Agentforce Analytics \(beta\) instead](#)

! **Note**

- Agentforce Analytics is **scheduled for retirement** starting May 2026. We recommend using [Agent Analytics instead](#)
- Agentforce Analytics stores and processes data using Data 360. It consumes credits used for billing based on your usage of the feature. To stop processing Data 360 credits and unlock the Data 360 objects, turn off Agentforce Analytics in the Einstein Feedback and Monitoring Setup. You can then [remove the Data 360 objects](#).
- Some Agentforce Analytics features include user feedback. To use all the features, turn on Feedback in the Einstein Feedback and Monitoring Setup.
- Agentforce Analytics isn't available in **Data Cloud One companion orgs** or in the **Data 360 sandbox**.
- Agentforce Analytics is not supported in **Government Cloud organizations**.
- Make sure your org uses the [standard Salesforce CRM Connector](#) so Data 360 can ingest the data from your org.

! **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

Found in the Agentforce (Default) folder in the Dashboard tab, the reports on the dashboard provide a variety of data points, including adoption, feedback, and usage analysis. You can click the charts or linked reports to drill deeper into the results. You can modify the reports and dashboards or create your own to suit your org's needs. But be sure to clone the report and modify the clone, not the original, to avoid breaking the analytics processes.



Utterance Analysis

Utterance Analysis lets you quickly see how Agentforce (Default) users are using agents, what they're requesting, and whether the agent was able to handle these requests. These customizable reports can help you refine your topics and actions so that your agents respond more effectively and accurately.

Agentforce Analytics Reports

Agentforce Analytics is based on Data 360 reports that can help you gain insight into the performance

of your agents. The reports show you who's using your agents, how successful they are, and what your adoption level is, among other things.

Legacy Agentforce Analytics Data Cloud Objects

Agentforce Analytics creates dashboards and reports built on Data Cloud objects.

Legacy Agentforce Analytics Troubleshooting

If you're not seeing the information you expect in your reports and dashboards, check these possible solutions.

See Also

[Trailhead: Agentforce Analytics and Monitoring](#)

Utterance Analysis

Utterance Analysis lets you quickly see how Agentforce (Default) users are using agents, what they're requesting, and whether the agent was able to handle these requests. These customizable reports can help you refine your topics and actions so that your agents respond more effectively and accurately.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

! **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

! **Note** Before you begin, enable Feedback in the [Einstein Feedback and Monitoring Setup](#) section of Setup.

Utterance Analysis is in the Agentforce (Default) folder in the Dashboard tab. The dashboard includes reports that track users, as well as the input and the agent response type. Reports are run on weekends and the dashboard is updated weekly.



Utterance Analysis brings similar utterances together into Clusters. Those clusters are in turn grouped into Categories. By grouping information, you can see the overall trends of what users are asking for.

You can also do a reverse search and filter for unsupported requests, marked as system topics, and see when an agent wasn't able to create a meaningful response. This information helps to determine when to create topics and actions that meet what users are requesting.

Utterance Analysis is built on Data 360 reports, which gives you the flexibility to customize it to suit your needs. But be sure to clone the report and modify the clone, not the original, to avoid breaking the analytics processes.

Agentforce Analytics Reports

Agentforce Analytics is based on Data 360 reports that can help you gain insight into the performance of your agents. The reports show you who's using your agents, how successful they are, and what your adoption level is, among other things.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

! **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

Agentforce (Default) Reports and Dashboard

If you're using Agentforce (Default), you have access to these reports and dashboard.

Agentforce (Default) Reports

REPORT NAME	DESCRIPTION	FOLDER
Adoption Rate	Percentage of enabled users that are active	Agentforce (Default)
Implicit Feedback Over Time	Implicit (thumbs up and thumbs down) user feedback by type per day	Agentforce (Default)
Interactions Per Session	Average number of user input turns per session	Agentforce (Default)
Latency	Average duration in seconds between the moment a request is submitted and the delivery of its corresponding response	Agentforce (Default)
Satisfaction Rate	Percentage of thumbs up out of	Agentforce (Default)

REPORT NAME	DESCRIPTION	FOLDER
	all implicit feedback given	
Stickiness	Percentage of weekly active users that are active on a specific day	Agentforce (Default)
Topic Use	Percentage of topics that are used frequently, occasionally, or not at all	Agentforce (Default)
User Adoption	Number of sessions and interactions by user	Agentforce (Default)
Weekly Active Users	Number of active users during a specific week	Agentforce (Default)

If you're using Agentforce (Default) and have feedback enabled, you have access to these Utterance Analysis reports as well.

Utterance Analysis Reports

REPORT NAME	DESCRIPTION	FOLDER
Requests Per Cluster	Total number of requests per cluster	Agentforce (Default) / Utterance Analysis
Topic Relevance	Number of requests handled by relevant or system topics	Agentforce (Default) / Utterance Analysis
Total Requests	Total number of requests made per day	Agentforce (Default) / Utterance Analysis
Unique Users	Total number of unique users per day	Agentforce (Default) / Utterance Analysis
Utterance Analysis	Organizes user input into categories and provides details for each category	Agentforce (Default) / Utterance Analysis

Dashboards

DASHBOARD NAME	DESCRIPTION	FOLDER
Agentforce (Default)	Agentforce (Default) dashboard	Agentforce (Default)
Utterance Analysis	Dashboard for Utterance Analysis reports	Agentforce (Default)

Agentforce Service Agent Reports and Dashboard

If you're using Agentforce Service Agent, you have access to these reports and dashboard.

Agentforce Service Agent Reports

REPORT NAME	DESCRIPTION	FOLDER
Abandoned Session	Total abandoned sessions by date and channel	Agentforce Service Agent
Actions Usage	Number of engaged sessions by action	Agentforce Service Agent
Deflection Session	Total deflected sessions by date and channel	Agentforce Service Agent
Engaged Session	Total engaged sessions by date and channel	Agentforce Service Agent
Key KPIs	Key KPIs	Agentforce Service Agent
Session Engagement	Session engagement metrics	Agentforce Service Agent
Topics Usage	Number of engaged sessions by topic	Agentforce Service Agent
Total Session	Total sessions by date and channel	Agentforce Service Agent

Agentforce Service Agent Dashboard

DASHBOARD NAME	DESCRIPTION	FOLDER
Agentforce Service Agent Overview	The standard Agentforce Service Agent dashboard that helps you track and manage your Agentforce Service Agent	Agentforce Service Agent

Legacy Agentforce Analytics Data Cloud Objects

Agentforce Analytics creates dashboards and reports built on Data Cloud objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

 **Note** Agentforce Analytics is **scheduled for retirement** starting May 2026. We recommend using [Agent Analytics instead](#).

 **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

Objects

If your org includes Agentforce (Default), Agentforce Analytics uses these objects.

Data Cloud Objects

OBJECT NAME	OBJECT TYPE	DESCRIPTION	SOURCE
BotDefinition_Home	Data Lake Object	Bots metadata such as Type and Label	CRM connector - BotDefinition
CopilotEvents	Data Lake Object	Chatbot logs that include every event generated by Copilot	CopilotEvents data stream
Copilot For Salesforce Apps Events	Data Lake Object	Agentforce (Default) events	Internal Copilot Events data transform
Copilot Analytics Calculator	Data Model Object	Metrics for Agentforce (Default) dashboard	CopilotAnalyticsCalculator DLO
Copilot for Salesforce Apps Events	Data Transforms	Bots event logs that are filtered for Agentforce (Default), including user names	CopilotEvents BotDefinition_Home
Copilot for Salesforce Apps Events	Data Model Object	Agentforce (Default) events	CopilotForSalesforceAppsEvents DLO
PermissionSet_Home	Data Lake Object	List of permission sets	CRM connector - PermissionSet
PermissionSetAssignment_Home	Data Lake Object	List of permission sets assigned to user	CRM connector - PermissionSetAssignment
UserEngagement	Data Lake Object	User engagement data such as render and clicks	UserEngagement data stream
User_Home	Data Lake Object	User metadata	CRM connector - User

OBJECT NAME	OBJECT TYPE	DESCRIPTION	SOURCE
User Engagement	Data Model Object	User engagement data such as render and clicks	UserEngagement DLO

If your org includes Agentforce Service Agents, Agentforce Analytics also uses these objects.

Data Cloud Objects

OBJECT NAME	OBJECT TYPE	DESCRIPTION	SOURCE
ConversationDefinitionSession_Home	Data Lake Object	Metrics calculated in core per session	CRM connector - ConversationDefinitionSession
Service Agent Copilot Events	Data Transforms	Bots event logs filtered for Agentforce Service Agent	CopilotChatbotEvents BotDefinition_Home
Service Agent Copilot Events	Data Lake Object	Agentforce Service Agent events	External Copilot Events data transform
Service Agent Copilot Events	Data Model Object	Agentforce Service Agent events	ServiceAgentCopilotEvents DLO
Service Agent Session Engagement	Data Model Object	Metrics per session and date for the Agentforce Service Agent report and dashboard	ServiceAgentSessionEngagement DLO

Legacy Agentforce Analytics Troubleshooting

If you're not seeing the information you expect in your reports and dashboards, check these possible solutions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

 **Note** Agentforce Analytics is **scheduled for retirement** starting May 2026. We recommend using Agent Analytics instead.

Issue	Solution
You can't view reports.	Make sure your org has a user assigned to the system admin role.
Data isn't displayed.	Make sure your agent is active.
Data isn't displayed in your demo or trial org.	Enable analytics data collection and storage .
The dashboard displays an error stating that the admin disabled the reports or the relationships have changed.	Clone the dashboard and work with the clone.
Username field in users adoption report is not populated.	In data transform, add a 15 characters user ID substring to the CopilotEvents object, and then update the connection between the CopilotEvents object and the user object with the new field
Data isn't displayed in agentforce default reports.	Make sure the agent type for agentforce default is Employee, and if it's not, retoggle the agentforce default toggle in setup and check again.

 **Note** Utterance Analysis reports are run on weekends. New data is displayed weekly.

Monitor Your Voice-Enabled Agent

To boost service quality, supervisors can monitor the voice-enabled agents on active calls by using Omni Supervisor. They can also monitor agent performance over time by using agent analytics reports and dashboards.

Monitor Agents with Omni Supervisor

To make sure that your voice-enabled agent consistently delivers high-quality service to customers over the phone, supervisors can monitor the call transcripts in the Agentforce tab of Omni Supervisor. The Agentforce tab shows a list of agents on active calls. If you're using a supervisor configuration, confirm that the Agentforce tab and the Agentforce Service agents are visible in Omni Supervisor.

The screenshot shows the Agentforce interface with the following details:

- Wallboard:** Shows 1 All Agentforce Agents and 1 Agentforce Service Agent.
- Service Reps:** Not applicable for this view.
- Queues Backlog:** Not applicable for this view.
- In-Progress Work:** Not applicable for this view.
- Agentforce:** Selected tab.
- Reports:** Not applicable for this view.
- Alerts:** Not applicable for this view.
- Conversation Summary:**
 - Name: Agentforce Service Agent
 - Flag: Monitor
 - Action: +15103017747
 - Date: 10/7/2025, 10:23 PM | Inbound | VC-00000020 | Automated Process
 - Channel: Phone
 - Duration: 1 min 30 s
- Conversation Log:**
 - 10/7/2025, 10:23 PM | Inbound | VC-00000020 | Automated P joined the conversation • 10:23:48 PM PDT
 - 10/7/2025, 10:24:43 PM PDT | Agent joined the conversation
 - 1234.
 - +15103017747 • 10/7/2025, 10:24:56 PM | Please provide the verification code you received in your email. It should be a unique code sent to you.
 - Agent • 10/7/2025, 10:25:02 PM | 1234 dash 67.
 - +15103017747 • 10/7/2025, 10:25:10 PM | Please confirm if the verification code you received is "1234-67".
 - Agent • 10/7/2025, 10:25:16 PM

See [Monitor Agentforce Service Agents](#).

Monitor Agent Performance with Agentforce Analytics

Agent Analytics: Seeing the overall picture

The Agent Analytics tool records every step of an AI conversation from start to finish. It gathers all the details from your agent's sessions into one place so you can see exactly how they're performing over time. By looking at these records, you can spot general trends and use the data to make sure that your agents stay helpful and efficient. See [Get Insights with Agent Analytics Dashboards](#).

Agent Optimization: Fixing specific problems

The Agent optimization tool helps you improve how the agent talks to your customers. You can listen to the recordings of the voice calls, dive into the details of conversations, and review quality scores. You can find knowledge gaps where the AI didn't have the right answer. Review specific examples and quality scores to get insights for optimizing your voice-enabled agent. See [Use Agent Optimization](#).

Agentforce Session Tracing

Agentforce session tracing captures detailed agent interaction data in a unified data model on Data 360. Build dashboards, reports, and queries on this data to derive insights into agent behavior and trends. Take data-driven action while testing, debugging, and monitoring agents in sandbox or production environments.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

[About Agentforce Session Tracing](#)

Agentforce session tracing captures details on agent interactions with users from start to finish. Agentforce session tracing ingests data from different sources (starting with reasoning engine logs) and combines everything under a session ID. The log provides detailed information into what happened during agent sessions: turn-by-turn interactions, reasoning engine executions, actions, prompt and gateway inputs/outputs, error messages, and final responses.

[Set Up Agentforce Session Tracing](#)

Turn on Agentforce Session Tracing to collect and store, in Data 360, detailed data about agent sessions. By default, Agentforce Session Tracing is turned off.

[Data Model for Agentforce Session Tracing](#)

Use the data in these DLOs/DMOs to build reports, dashboards, and queries that provide insights into agent behavior.

[Get Insights from Agent Session Tracing Data](#)

To analyze Agentforce session tracing data, you can use observability dashboards, run queries, and build Data 360 reports using the data model.

[Billing Considerations for Agentforce Session Tracing](#)

Agentforce Session Tracing data is stored in Data 360. When you use specific Data 360 features, it can affect your credit consumption.

[Implement Data Governance Permissions for Agentforce Session Tracing Objects](#)

Agentforce Session Tracing data can contain sensitive information, such as personally identifying information (PII), that you want to redact or hide from unauthorized users. Use Data Cloud Data Governance to protect sensitive data by setting up dynamic data masking and field-specific data exclusion policies. You need to grant access to the impacted Data 360 objects according to an access policy.

[Manually Remove Collected Data for Agentforce Session Tracing](#)

Suspending data collection keeps your data so that you can resume later. To remove collected data completely, however, you must manually delete certain objects (Data Streams, DLOs, and DMOs) associated with the session tracing data model.

About Agentforce Session Tracing

Agentforce session tracing captures details on agent interactions with users from start to finish. Agentforce session tracing ingests data from different sources (starting with reasoning engine logs) and combines everything under a session ID. The log provides detailed information into what happened during agent sessions: turn-by-turn interactions, reasoning engine executions, actions, prompt and gateway inputs/outputs, error messages, and final responses.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

For example, you can:

- Debug agent setup and configuration issue during build time.
- Learn why certain test cases failed during batch test
- Address why an agent isn't able to handle a set of user questions and is going off topic.

Agentforce session tracing supports all types of agents. Use session trace data to observe, monitor, investigate, and troubleshoot agent events, incidents, and behavior patterns. Get insights by running queries and reports on the data captured in the session trace data model. Data is accessible via Data Model Objects (DMOs).

Set Up Agentforce Session Tracing

Turn on Agentforce Session Tracing to collect and store, in Data 360, detailed data about agent sessions. By default, Agentforce Session Tracing is turned off.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To turn on data collection:	View Setup
	AND
	Customize Application

1. Verify that you have the latest version of the Salesforce Standard Data Model (version 1.124 or higher) in your org (sandbox or production). From Setup, go to **Apps** -> **Packaging** -> **Installed Packages** ->

Salesforce Standard Data Model. To get the required version, click [here](#) and follow the instructions.

2. Ensure that Einstein Generative AI is turned on in your org. To learn more, see [Set Up Einstein Generative AI](#).
3. From Setup, in the Quick Find box, enter *Einstein Generative AI*, and then select **Einstein Audit, Analytics, and Monitoring Setup**.
4. Scroll down to **Agentforce Session Tracing**.
5. Toggle the switch.

Agentforce Session Tracing opt-in toggle

Agentforce Session Tracing

Capture and store detailed interaction data for all agents. Get a full view of the agent's behavior from start to finish, including reasoning engine executions, actions, prompt and gateway inputs/outputs, error messages, and final responses.

 On

[Learn More](#)

- a. Turn on Agentforce Session Tracing to start collecting data in Data 360. Your data model is provisioned in just a few minutes. Data collection then starts immediately and recurs at five-minute intervals. Note that turning data collection increases your org's credit consumption rate.
- b. Turn off data collection to stop collecting data and automatically turn off any dependent features.
6. If prompted (for example, if you're turning data collection on and your org has multiple data spaces), select a target [data space](#) to store the session trace data.
 - If you've previously collected session tracing data and you want to continue adding to that data, be sure to select the previously selected data space.
 - If you're using Data Cloud One companion connection to connect your orgs to Data 360, you'll only see the data spaces that are shared with your [companion org](#).
 - If you're using a data space that is shared with your companion org, make sure the initialization status for the shared data space is set to Active. See [Monitor Data Cloud Companion Connections](#) and [Data Cloud One Companion Connection Statuses](#).
 - If you change the data space, then the data model is provisioned in the new data space. Any data collection stops in the previous data space and begins in the new one. Data collected in the previous data space remains until it's manually deleted. That data will not be migrated to the new data space.
 - Be sure to communicate any data space selection change internally and with your Salesforce Admin team.
7. If you want to protect access to collected data that is sensitive, see [Implement Data Governance Permissions for Agentforce Session Tracing Objects](#).

Suspending data collection keeps your data so that you can resume later. Any reports show a gap between the time you turn it off and turn it back on. To remove collected data completely, see [Manually Remove Collected Data for Agentforce Session Tracing](#).

Data Model for Agentforce Session Tracing

Use the data in these DLOs/DMOs to build reports, dashboards, and queries that provide insights into agent behavior.

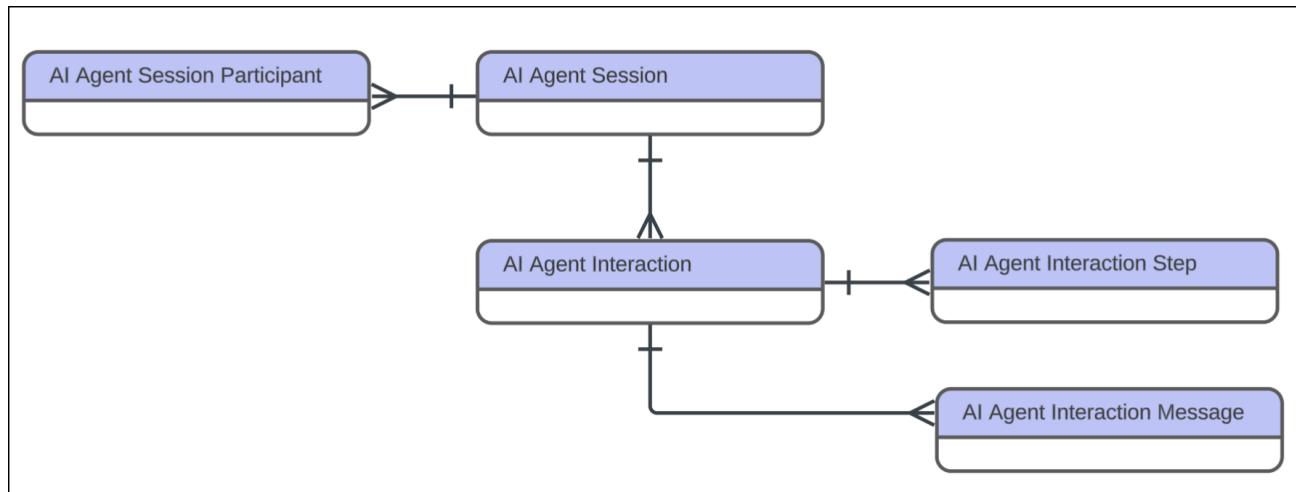
REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

About the Agentforce Session Tracing Data Model

The data model for Agentforce Session Tracing is a collection of DLOs (Data Lake Objects) and DMOs (Data Model Objects) that contain detailed session trace logs of agent behavior. The data model also includes references to every LLM call the reasoning engine makes to support joins with feedback data or guardrails metrics. Data is streamed to DLOs in Data 360 and then mapped to the applicable DMOs.

Agentforce Session Tracing Data Model ERD



DLO/DMO	Description
<code>AIAgentSession</code>	Represents an overarching container capturing contiguous interactions with one or more AI agents. A typical session might start when the customer asks their first question and end when the customer closes the agent chat window.
<code>AIAgentSessionParticipant</code>	Represents an entity (human or AI) that takes part in an <code>AIAgentSession</code> .
<code>AIAgentInteraction</code>	Represents a segment within a session. It typically begins with a user's request and ends when the AI agent provides a response to that request.
<code>AIAgentInteractionStep</code>	Represents a discrete action or operation performed during an interaction to fulfill the user's request.

DLO/DMO	Description
<code>AIAgentInteractionMessage</code>	Represents a single communication provided by the user or generated by the AI agent during a session.

Here are the relationships between entities.

DLO/DMO	Description
<code>AIAgentSession</code> : <code>AIAgentInteraction</code>	1: Many (one session has many interactions)
<code>AIAgentSession</code> : <code>AIAgentSessionParticipant</code>	1: Many (one session has many participants)
<code>AIAgentInteraction</code> : <code>AIAgentInteractionMessage</code>	1: Many (one interaction has many messages)
<code>AIAgentInteraction</code> : <code>AIAgentInteractionStep</code>	1: Many (one interaction has many steps)
<code>AIAgentInteractionMessage</code> : <code>AIAgentSessionParticipant</code>	Many: 1 (each message has one sender participant). Also, <code>AIAgentInteractionMessage</code> > parent message (optional self-link) for threads.

AI Agent Session DMO

A Data Cloud DMO that captures agent session-level details. The `AIAgentSession` object has these attributes.

Field Label	Field API Name	Data Type	Description
<code>AI Agent Session Id</code>	<code>Id</code>	Text	Primary key.
<code>Start Timestamp</code>	<code>StartTimeStamp</code>	Date - Time	Timestamp when the session began.
<code>End Timestamp</code>	<code>EndTimeStamp</code>	Date - Time	Timestamp when the session concluded or timed out.
<code>Variable</code>	<code>VariableText</code>	Text	Reserved for future use. Key-value pairs of contextual session data used by agents during interactions.

Field Label	Field API Name	Data Type	Description
Session Owner	SessionOwner rId	Text	Reserved for future use. Id of the record of the participant who initiated the session.
Session Owner Object	SessionOwner rObject	Text	Reserved for future use. Name of the DMO to which the Session Owner record belongs. Example value: <code>Individual</code>
Individual	IndividualI d	Text - Reference Id (Lookup)	Reserved for future use. Reference to an Individual record that represents the session owner participant. Populated only if the <code>SessionOwnerObject</code> is <code>Individual</code> .
AI Agent Channel Type	AiAgentChan nelTypeId	Text - Reference Id (Lookup)	Type of communication channel through which the session was initiated.
Related Voice Call	VoiceCallId	Text - Reference Id (Lookup)	Id that links the session to the voice call from which the session was initiated.
Related Messaging Session	MessagingSe ssionId	Text - Reference Id (Lookup)	Id linking the AI agent session to the messaging session from which the AI agent session was initiated.
Previous Session Id	PreviousSes sionId	Text - Reference Id (Lookup)	Reserved for future use. Reference to the previous AI agent session. Applies in a multi-agent session scenario.
AI Agent Session End Type	AiAgentSess ionEndType	Text - Reference Id (Lookup)	How the session ended. Example values: <code>resolved</code> , <code>escalated</code> , <code>deflected</code> , or <code>other</code> .

AI Agent Session Participant DMO

A Data Cloud DMO that captures details about who was associated with the session (for example, the Contact, Lead, or Account). The `AIAGentsessionParticipant` object has these attributes.

Field Label	Field API Name	Data Type	Description
AI Agent	Id	Text	Primary key.

Field Label	Field API Name	Data Type	Description
Session Participant Id			
AI Agent Session	AiAgentSessionId	Text - Reference - Id (Parent)	Reference to the specific AiAgentSession in which this participant was involved.
AI Agent Type	AiAgentTypeId	Text - Reference - Id (Lookup)	Type of AI Agent. Example values: <code>Employee</code> , <code>EinsteinSDR</code> , <code>EinsteinServiceAgent</code>
AI Agent Template Api Name	AiAgentTemplateApiName	Text	Template used to create the agent.
Start Timestamp	Date - Time	Date - Time	Timestamp when the participant joined the session.
End Timestamp	Date - Time	Date - Time	Timestamp when the participant left the session or stopped interacting in the session.
Participant Attribute	ParticipantAttributeText	Text	Reserved for future use. JSON key-value pairs that represent additional metadata or attributes of the participant specific to this session.
Participant	ParticipantId	Text	Reference to the record representing the participant involved in the session.
Participant Object	ParticipantObject	Text	Name of the DMO to which the Participant record belongs. Example values: <code>Individual</code>
AI Agent Version Api Name	AiAgentVersionApiName	Text	API name of the AI agent version. Populated only if the participant is an AI agent.
AI Agent Api Name	AiAgentApiName	Text	API name of the AI agent. Populated only if the participant is an AI agent.
Individual	IndividualId	Text - Reference - Id (Lookup)	Reserved for future use. Reference to an Individual record that represents the participant. Populated if the participant record's DMO type is

Field Label	Field API Name	Data Type	Description
			Individual.
AI Agent Session Participant Role	AiAgentSessionParticipantRoleId	Text - Reference - Id (Lookup)	Defines the role of the participant within the session. Example values: Owner, Observer

AI Agent Interaction DMO

A Data Cloud DMO that captures turn-by-turn details associated with interactions. The `AIAgentInteraction` object has these attributes.

Field Label	Field API Name	Data Type	Description
AI Agent Interaction Id	Id	Text	Primary Key.
AI Agent Session	AiAgentSessionId	Text - Reference - Id (Parent)	Reference to the parent session in which this interaction occurred.
Previous Interaction	PrevInteractionId	Text - Reference - Id (Lookup)	Reference to the previous interaction. Enables the sequencing or chaining of interactions.
Ai Agent Interaction Type	AiAgentInteractionTypeId	Text - Reference - Id (Lookup)	Categorizes the interaction type. Example value: Turn
Start Timestamp	StartTimeStamp	Date - Time	Timestamp when the interaction began.
End Timestamp	EndTimeStamp	Date - Time	Timestamp when the interaction completed.
Attributes	AttributeText	Text	JSON key-value pairs that store additional metadata or contextual information specific to the interaction.
Telemetry Trace	TelemetryTraceId	Text	Identifier used for distributed tracing. Allows for the tracking of interactions across system components.

Field Label	Field API Name	Data Type	Description
Telemetry Trace Span	TelemetryTraceSpanId	Text - Reference - Id (Lookup)	Span identifier for tracing this specific interaction within a larger distributed tracing context.
Session Owner	SessionOwner	Text	Reserved for future use. Id of the record of the participant who initiated (owned) the session.
Session Owner Object	SessionOwnerObject	Text	Reserved for future use. Name of the DMO to which the Session Owner record belongs. Example value: <code>Individual</code>
Individual	IndividualId	Text - Reference - Id (Lookup)	Reserved for future use. Reference to an Individual record that represents the session owner participant. Populated only if the <code>SessionOwnerObject</code> is <code>Individual</code> .
Topic Api Name	TopicApiName	Text	API name of the topic that was classified for the interaction.

AI Agent Interaction Message DMO

A Data Cloud DMO that captures details about session interaction messages. The `AIAgentInteractionMessage` object has these attributes.

Field Label	Field API Name	Data Type	Description
AI Agent Interaction Message Id	Id	Text	Primary key.
AI Agent Interaction	AiAgentInteractionId	Text - Reference - Id (Parent)	Reference to the interaction to which this message belongs.
AI Agent Session Participant	AiAgentSessionParticipantId	Text - Reference - Id (Lookup)	Reference to the participant who sent the message.
Parent Message	ParentMessageId	Text - Reference - Id (Lookup)	Reference to another message. Populated if this message is a reply or continuation.

Field Label	Field API Name	Data Type	Description
AI Agent Interaction Message Type	AiAgentInteractionMessageTypeId	Text - Reference - Id (Lookup)	Type of message. Example values: <code>Input</code> , <code>Output</code>
Message Sent Timestamp	MessageSentTimestamp	Date - Time	Exact time when the message was sent.
Ai Agent Interaction Msg Content Type	AiAgentInteractionMsgContentTypeId	Text - Reference - Id (Lookup)	Format or type of the message content. Example values: text/plain, application/json, audio/wav
Content	ContentText	Text	Textual content if the message is text-based. Otherwise, the field contains NA.
AI Agent Session	AiAgentSessionId	Text - Reference - Id (Lookup)	Reference to the session to which this message belongs.
Session Owner	SessionOwnerId	Text	Reserved for future use. Id of the record of the participant who initiated the session (owner).
Session Owner Object	SessionOwnerObject	Text	Reserved for future use. Name of the DMO to which the Session Owner record belongs. Example value: <code>Individual</code>
Individual	IndividualId	Text - Reference - Id (Lookup)	Reserved for future use. Reference to an Individual record. Represents the session owner participant. Populated only if the <code>SessionOwnerObject</code> is <code>Individual</code> .

AI Agent Interaction Step DMO

A Data Cloud DMO that captures details about interaction steps. The `AIAgentInteractionStep` object has these attributes.

Field Label	Field API Name	Data Type	Description
AI Agent	Id	Text	Primary key.

Field Label	Field API Name	Data Type	Description
Interaction Step Id			
AI Agent Interaction	AiAgentInteractionId	Text - Reference - Id (Parent)	Reference to the interaction to which this step belongs.
Previous Step	PrevStepId	Text - Reference - Id (Lookup)	Reserved for future use. Reference to the previous interaction. Enables the sequencing or chaining of interactions.
Ai Agent Interaction Step Type	AiAgentInteractionStepType	Text - Reference - Id (Lookup)	Categorizes the step type. Example values: <code>UserInputStep</code> , <code>LLMExecutionStep</code> , <code>FunctionStep</code>
Start Timestamp	StartTimeStamp	Date - Time	Timestamp when step execution began.
End Timestamp	EndTimeStamp	Date - Time	Timestamp when step execution completed.
Pre-step Variables	PreStepVariableText	Text	Reserved for future use. State of relevant variables before step execution began.
Post-step Variables	PostStepVariableText	Text	Reserved for future use. State of variables after step execution ends.
Input Value	InputValueText	Text	Input data provided to the step.
Output Value	OutputValueText	Text	Output data resulting from the step's execution.
Error Message	ErrorMessageText	Text	Error details if the step execution encountered issues or exceptions.
Attributes	AttributeText	Text	JSON key-value pairs representing additional metadata or properties of the step.
Telemetry Trace Span	TelemetryTraceSpanId	Text - Reference - Id (Lookup)	Identifier used for distributed tracing. Associates this step within a broader tracing context.
Generation	GenerationId	Text	Reference to a GenAiGeneration record if the step made an LLM generation request.

Field Label	Field API Name	Data Type	Description
Gen AI Gateway Request	GenAiGatewayRequest.Id	Text	Reference to a GenAiGatewayRequest record if the step made an LLM generation request.
Gen AI Gateway Response	GenAiGatewayResponse.Id	Text	Reference to a GenAiGatewayResponse record if the step involved makes an LLM generation request.
Name	Name	Text	Name of the step performed by the AI Agent. For example, if the step type is an action, then Name will be the Action Name.

Get Insights from Agent Session Tracing Data

To analyze Agentforce session tracing data, you can use observability dashboards, run queries, and build Data 360 reports using the data model.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To view and access reports and dashboards	Data Cloud User
---	-----------------

To access any pre-built reports and dashboards, make sure you have Data Cloud User permissions. See [Create Data Cloud Users and Assign Permissions](#).

Observability Dashboards

Visualize session tracing data using these out-of-the-box observability features:

- [Agent Analytics](#) analyzes your AI agents' performance within user and agent sessions. To get started, see [Set Up Agent Analytics](#).
- [Agent Optimization](#) allows you to inspect agent sessions from the initial user request to the agent's resolution. To get started, see [Set Up Agent Optimization](#).

Example: Simple Query

```

SELECT *
    FROM "AiAgentSession__dlm"
    JOIN "AiAgentSessionParticipant__dlm" ON "AiAgentSession__dlm"."id__c" = "AiAgentSessionParticipant__dlm"."aiAgentSessionId__c"
    JOIN "AiAgentInteraction__dlm" ON "AiAgentSession__dlm"."id__c" = "AiAgentInteraction__dlm"."aiAgentSessionId__c"
    JOIN "AiAgentInteractionMessage__dlm" ON
        "AiAgentInteraction__dlm"."id__c" = "AiAgentInteractionMessage__dlm"."aiAgentInteractionId__c"
    JOIN "AiAgentInteractionStep__dlm" ON
        "AiAgentInteraction__dlm"."id__c" = "AiAgentInteractionStep__dlm"."aiAgentInteractionId__c"
    WHERE "AiAgentSession__dlm"."id__c" = 'your_uuid'
    LIMIT 10

```

where `your_uuid` is a user-specified UUID.

Example: Get Recent Sessions

The following example query gets a list of recent sessions. You can change the internal days to see the session count data.

```

SELECT
    ssot__Id__c,
    ssot__StartTimestamp__c
FROM ssot__AiAgentSession__dlm s
WHERE s.ssot__StartTimestamp__c >= current_date - INTERVAL '7' DAY
ORDER BY s.ssot__StartTimestamp__c DESC;

```

Example: Get All Messages Within an Interaction

The following example query gets all messages (user text or agent text) within a given interaction. It searches by interaction ID.

```

SELECT
    ssot__AiAgentInteractionId__c AS InteractionId,
    ssot__AiAgentInteractionMessageType__c, -- user or agent
    ssot__AiAgentInteractionMsgContentType__c, -- e.g., text
    ssot__ContentText__c,
    ssot__AiAgentSessionParticipantId__c AS SenderParticipantId,

```

```

ssot__ParentMessageId__c      -- if part of a thread
FROM "ssot__AiAgentInteractionMessage__dlm"
WHERE ssot__AiAgentInteractionId__c = '<given-interaction-id>' --'01
99aac4-1047-70f3-8311-94d0d1678bb4'
ORDER BY ssot__MessageSentTimestamp__c ASC;

```

Example: Find Interaction Steps With Errors

The following example query gets all interaction steps with errors.

```

SELECT
    ssot__AiAgentInteractionId__c AS InteractionId,
    ssot__Id__c AS StepId,
    ssot__Name__c AS StepName,
    ssot__InputValueText__c AS Input,
    ssot__ErrorMessageText__c AS StepErrorMessage
FROM "ssot__AiAgentInteractionStep__dlm"
WHERE length(ssot__ErrorMessageText__c) > 0 AND ssot__ErrorMessageTe
xt__c != 'NOT_SET'
LIMIT 100;

```

Example: Integrate Feedback or Guardrails Metrics

The Session Trace data model includes reference fields for every LLM call the reasoning engine makes (`generationRequestId`, `generationId`, and `gatewayResponseId`). To incorporate feedback data or guardrails metrics in your analysis, join these fields when writing queries and building reports.

Example:

```

SELECT *
    FROM "AiAgentSession__dlm"
    JOIN "AiAgentSessionParticipant__dlm" ON "AiAgentSession__dlm"."i
d__c" = "AiAgentSessionParticipant__dlm"."aiAgentSessionId__c"
    JOIN "AiAgentInteraction__dlm" ON "AiAgentSession__dlm"."id__c" = "A
iAgentInteraction__dlm"."aiAgentSessionId__c"
    JOIN "AiAgentInteractionMessage__dlm" ON "AiAgentInteraction__dl
m"."id__c" = "AiAgentInteractionMessage__dlm"."aiAgentInteractionId__c"
    JOIN "AiAgentInteractionStep__dlm" ON "AiAgentInteraction__dlm"."i
d__c" = "AiAgentInteractionStep__dlm"."aiAgentInteractionId__c"
LIMIT 10

```

Example: Get Interactions from Session Tracing and Feedback Data

The following example query gets a list of interactions from session tracing and feedback from Audit and Feedback data..

```

SELECT
    ssot__AiAgentInteractionId__c AS InteractionId,
    ssot__Name__c AS StepName,
    GenAIGatewayRequest__dlm.prompt__c AS Input_Prompt,
    GenAIGeneration__dlm.responseText__c AS LLM_Response,
    GenAIFeedback__dlm.feedback__c AS Feedback
FROM
    ssot__AiAgentInteractionStep__dlm
LEFT JOIN GenAIGeneration__dlm
    ON ssot__AiAgentInteractionStep__dlm.ssot__GenerationId__c = GenAIGeneration__dlm.generationId__c
LEFT JOIN GenAIGatewayRequest__dlm
    ON ssot__AiAgentInteractionStep__dlm.ssot__GenAiGatewayRequestId__c = GenAIGatewayRequest__dlm.gatewayRequestId__c
LEFT JOIN GenAIGatewayResponse__dlm
    ON GenAIGatewayRequest__dlm.gatewayRequestId__c = GenAIGatewayResponse__dlm.generationRequestId__c
LEFT JOIN GenAIFeedback__dlm
    ON GenAIGeneration__dlm.generationId__c = GenAIFeedback__dlm.generationId__c
WHERE
    GenAIGatewayResponse__dlm.generationResponseId__c = GenAIGeneration__dlm.generationResponseId__c
LIMIT 100;

```

Example: Retrieve a Session's Related Records in a Flat List

One agent session contains many records from related objects. Use this query to see all of a session's records in a flattened list sorted by timestamp. Replace <your sessionId> with your sessionID.

```

WITH
    -- Keep session ID in temp table for easier reference
    params AS (
        SELECT
            '<your sessionId>' AS session_id
    ),
    -- Retrieve the agent interactions and agent interaction messages
    -- to see each turn and input/output messages per turn
    interactionsWithMessages AS (

```

```

SELECT
    I.ssot__AiAgentInteractionType__c AS InteractionType,
    I.ssot__StartTimestamp__c AS InteractionStartTime,
    I.ssot__EndTimestamp__c AS InteractionEndTime,
    I.ssot__TopicApiName__c AS TopicName,
    M.ssot__MessageSentTimestamp__c AS MessageSentTime,
    M.ssot__ContentText__c AS ContextText,
    M.ssot__AiAgentInteractionMessageType__c AS InteractionMessageType
FROM
    ssot__AiAgentSession__dlm AS S
    JOIN ssot__AiAgentInteraction__dlm AS I ON S.ssot__id__c = I.ssot__aiAgentSessionId__c
        JOIN ssot__AiAgentInteractionMessage__dlm AS M ON I.ssot__id__c = M.ssot__aiAgentInteractionId__c
            JOIN params AS p ON S.ssot__Id__c = p.session_id
),
-- Retrieve the agent interactions and agent interaction steps performed on each turn by the agent to generate its output
interactionsWithSteps AS (
SELECT
    I.ssot__AiAgentInteractionType__c AS InteractionType,
    I.ssot__StartTimestamp__c AS InteractionStartTime,
    I.ssot__EndTimestamp__c AS InteractionEndTime,
    I.ssot__TopicApiName__c AS TopicName,
    St.ssot__AiAgentInteractionStepType__c AS InteractionStepType,
    St.ssot__Name__c AS Name,
    St.ssot__InputValueText__c AS InputValueText,
    St.ssot__OutputValueText__c AS OutputValueText,
    St.ssot__StartTimestamp__c AS InteractionStepStartTime,
    St.ssot__PreStepVariableText__c AS PreStepVariableText,
    St.ssot__PostStepVariableText__c AS PostStepVariableText
FROM
    ssot__AiAgentSession__dlm AS S
    JOIN ssot__AiAgentInteraction__dlm AS I ON S.ssot__id__c = I.ssot__aiAgentSessionId__c
        JOIN ssot__AiAgentInteractionStep__dlm AS St ON I.ssot__id__c = St.ssot__aiAgentInteractionId__c
            JOIN params AS p ON S.ssot__Id__c = p.session_id
),
-- Join both data sets
interactionsWithMessagesAndSteps AS (
SELECT
    *,
    CAST(NULL AS VARCHAR) AS InteractionStepType,

```

```
CAST(NULL AS VARCHAR) AS Name,
CAST(NULL AS VARCHAR) AS InputValueText,
CAST(NULL AS VARCHAR) AS OutputValueText,
CAST(NULL AS VARCHAR) AS PreStepVariableText,
CAST(NULL AS VARCHAR) AS PostStepVariableText
FROM
interactionsWithMessages
UNION ALL
SELECT
InteractionType,
InteractionStartTime,
InteractionEndTime,
TopicName,
-- Use InteractionStepStartTime as MessageSentTime to sort unified
records
InteractionStepStartTime AS MessageSentTime,
CAST(NULL AS VARCHAR) AS ContextText,
CAST(NULL AS VARCHAR) AS InteractionMessageType,
InteractionStepType,
Name,
InputValueText,
OutputValueText,
PreStepVariableText,
PostStepVariableText
FROM
interactionsWithSteps
)
-- Reorder fields and sort them by MessageSentTime
SELECT
TopicName, InteractionType, InteractionStartTime, InteractionEndTi
me,
MessageSentTime, InteractionMessageType, ContextText,
InteractionStepType, Name, InputValueText, OutputValueText, PreSte
pVariableText, PostStepVariableText
FROM interactionsWithMessagesAndSteps
ORDER BY MessageSentTime ASC
```

Example: list of records for a session

topicname	interactiontype	interactionstarttime	interactionendtime	messagesentime	interactionmessagetype	contexttext	interactionsteptype	name
1 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T22:57:50	2025-10-03T22:58:04.333+...	2025-10-03T22:57:50.417+...	Input	Hello. List my accounts.		
2 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T22:57:50	2025-10-03T22:58:04.333+...	2025-10-03T22:57:50.493+...			LLM_STEP	AiCopilot__ReactTopicPrompt
3 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T22:57:50	2025-10-03T22:58:04.333+...	2025-10-03T22:57:50.602+...			TOPIC_STEP	EmployeeCopilot__GeneralC...
4 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T22:57:50	2025-10-03T22:58:04.333+...	2025-10-03T22:57:50.639+...			LLM_STEP	AiCopilot__ReactInitialPrompt
5 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T22:57:50	2025-10-03T22:58:04.333+...	2025-10-03T22:57:52.011+...			ACTION_STEP	EmployeeCopilot__GeneralC...
6 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T22:57:50	2025-10-03T22:58:04.333+...	2025-10-03T22:58:03.096+...			LLM_STEP	AiCopilot__ReactInitialPrompt
7 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T22:57:50	2025-10-03T22:58:04.333+...	2025-10-03T22:58:04.318+...	Output	Here are the accounts ass		
8 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T23:00:15	2025-10-03T23:00:28.547+...	2025-10-03T23:00:15.403+...	Input	Summarize the opportunit		
9 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T23:00:15	2025-10-03T23:00:28.547+...	2025-10-03T23:00:15.479+...			LLM_STEP	AiCopilot__ReactTopicPrompt
10 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T23:00:15	2025-10-03T23:00:28.547+...	2025-10-03T23:00:15.589+...			TOPIC_STEP	EmployeeCopilot__GeneralC...
11 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T23:00:15	2025-10-03T23:00:28.547+...	2025-10-03T23:00:15.615+...			LLM_STEP	AiCopilot__ReactInitialPrompt
12 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T23:00:15	2025-10-03T23:00:28.547+...	2025-10-03T23:00:17.041+...			ACTION_STEP	EmployeeCopilot__GeneralC...
13 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T23:00:15	2025-10-03T23:00:28.547+...	2025-10-03T23:00:27.341+...			LLM_STEP	AiCopilot__ReactInitialPrompt
14 EmployeeCopilot__GeneralCRM	TURN	2025-10-03T23:00:15	2025-10-03T23:00:28.547+...	2025-10-03T23:00:28.536+...	Output	Here are the opportunities:		

Build Data 360 Reports

To analyze Agentforce session trace data, build reports in Data 360 that pull relevant information from the DMOs in the [session tracing data model](#). You can use calculated insights to create metrics that can trigger alerts. To learn more, including required permissions, see [Data 360 Reports and Dashboards](#).

Billing Considerations for Agentforce Session Tracing

Agentforce Session Tracing data is stored in Data 360. When you use specific Data 360 features, it can affect your credit consumption.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Agentforce Session Tracing consumes Data 360 credits for ingestion, storage, and processing.

- 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](#).

Digital Wallet Card	Usage Type	Description	Notes
Data Services	Batch Data Pipeline (External Data Pipeline)	Usage is calculated based on the number of rows batch data processed by Data 360 data streams across all connectors, with the exception of structured data ingested via the Internal Data Pipeline.	Agentforce Session Tracing data are ingested into Data 360 data streams, and the usage is based on the amount of data ingested.

Digital Wallet Card	Usage Type	Description	Notes
			<p>On average, each round trip to the large language model (LLM) and back results in 24 records being ingested into Data 360.</p> <p>The volume of data ingested is the primary contributor to the consumption of credits among the three types of usage.</p>
Data Services	Data Queries	<p>Usage is calculated based on the number of records processed.</p> <p>The count of records processed depends on the structure of a query as well as other related factors such as the total number of records in the objects being queried.</p>	Data queries are used to create Data 360 reports and dashboards. Usage is calculated based on records processed.
Data Services	Streaming Calculated Insights	Usage is calculated based on the number of records processed.	Consumers of Session Trace data Calculated Insights (CIs) are used for Prompt Builder Usage and Feedback Metrics (Beta).
Data Storage	Storage Beyond Allocation	Usage is calculated based on the amount of storage used above the amount allocated.	Usage is calculated based on the amount of storage consumed over the allocated amount.

To estimate the number of Data 360 credits, see [Multipliers in Data 360](#).

For more information on how Data 360 usage is billed, refer to your contract or contact your account executive.

See Also

[Data 360 Billable Usage Types](#)

Implement Data Governance Permissions for Agentforce Session Tracing Objects

Agentforce Session Tracing data can contain sensitive information, such as personally identifying

information (PII), that you want to redact or hide from unauthorized users. Use Data Cloud Data Governance to protect sensitive data by setting up dynamic data masking and field-specific data exclusion policies. You need to grant access to the impacted Data 360 objects according to an access policy.

Access Policy Options

You can select from either attribute-based access control (ABAC) or role-based access control (RBAC). This allows you to have more granular control over your users' access to data. Follow instructions in [Assign Data Access](#) to assign these objects to an available policy.

Impacted Data 360 Objects

For a list of impacted Data 360 objects, see [Data Model for Agentforce Session Tracing](#).

If you have more than one data space, you must grant access to objects in each data space. Object names in non-default data spaces follow the convention of <DataSpace Prefix>_<Object Name> .

Test Your Access Policies

After you've updated permissions, be sure to test user access to collected Agentforce Session Tracing data.

See Also

[Data Governance in Data 360](#)

Manually Remove Collected Data for Agentforce Session Tracing

Suspending data collection keeps your data so that you can resume later. To remove collected data completely, however, you must manually delete certain objects (Data Streams, DLOs, and DMOs) associated with the session tracing data model.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To delete Data Cloud objects: Data Cloud admin

 **Note** Before you delete these objects, make sure to turn off any features for which data is being collected.

1. Turn off data collection for Agentforce Session Tracing.
Follow the steps in [Set Up Agentforce Session Tracing](#).
2. In Data Cloud, manually delete the DMOs described in [Data Model for Agentforce Session Tracing](#).
 - a. For each DMO, remove all field mappings and dependencies.
Follow the steps in [Edit Data Cloud Objects and Field Mappings](#) in Data Cloud Help.
 - b. After all field mappings and dependencies are removed, delete the DMO.
3. In Data Cloud, manually delete the data streams associated with Agentforce Session Tracing. Deleting the data streams also deletes the DLO and the data it contains.
Follow the steps in [Delete a Data Stream](#) in Data Cloud Help.

Monitor Agent Guardrails

Monitor instruction adherence and task resolution (beta) for your agents.

[Instruction Adherence](#)

Instruction adherence is an agent guardrail that evaluates how well your agents interpret topic instructions when generating responses.

[Task Resolution](#)

Task resolution is an agent guardrail that evaluates how well your agents interpret the user's intent, as expressed in a given conversation, and how well it resolves the task.

Instruction Adherence

Instruction adherence is an agent guardrail that evaluates how well your agents interpret topic instructions when generating responses.

[About Instruction Adherence](#)

An agent topic defines a specific task an agent can perform and is an essential element of its reasoning. Topic instructions are important for agent decision-making, behavior, and responses. Evaluating how well the agent interprets and follows the topic instructions is key to ensuring the agent behavior is as intended.

[Create Data 360 Reports to Monitor Instruction Adherence](#)

Create Data 360 reports to monitor how well agents are interpreting topic instructions.

See Also

[Create Data 360 Reports to Monitor Instruction Adherence](#)

[Agentforce Developer Guide: Use Test Results to Improve Your Agent](#)

[Task Resolution](#)

About Instruction Adherence

An agent topic defines a specific task an agent can perform and is an essential element of its reasoning. Topic instructions are important for agent decision-making, behavior, and responses. Evaluating how well the agent interprets and follows the topic instructions is key to ensuring the agent behavior is as intended.

intended.

REQUIRED EDITIONS

Available in: Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Foundations or Agentforce 1 editions. Setup for AI agents is available on the desktop site.

Instruction Adherence Score

This is where instruction adherence comes in, evaluating the agent's response and scoring it based on how well the agent interprets and follows the topic instructions. The scores are classified into these categories.

Score	Description
High	Indicates that the agent interprets and fully follows the topic instructions, addressing key points and providing the required information.
Low	Indicates that the agent doesn't interpret or follow the topic instructions accurately. It fails to follow at least one instruction, leading to an incorrect response.
Uncertain	Indicates that instruction adherence can't be conclusively determined due to an ambiguous response or action, incomplete response, or conflicting interpretations of the topic instructions.

Scores and Explanations are Logged in Data 360 and Visible in Agent Event Logs

Instruction Adherence scores are logged in the Einstein Generative AI Audit and Feedback data model in Data 360, which must be turned on in your org (see [Set Up Einstein Generative AI Audit and Feedback](#)). Scores are visible in agent event logs.

In addition to the scores, an explanation of why an agent's response was classified as high, low, or uncertain is included. You can use this information to see how your agent is following the topic instructions. It can also help you determine whether the topic instructions need improvement or if additional instructions are needed. See [Best Practices for Writing Topic Instructions and Troubleshooting Agents](#).

 **Note** This feature is supported only in English and is available only for Agentforce for Service agents.

Monitor and Track Instruction Adherence

Use the following tools to monitor and track instruction adherence.

- [Create Data 360 Reports to Monitor Instruction Adherence](#)

- Turn on [Enhanced Agent Event Logs](#) to review Instruction Adherence details in the event logs.

Create Data 360 Reports to Monitor Instruction Adherence

Create Data 360 reports to monitor how well agents are interpreting topic instructions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To create, edit, and delete reports in private folders:

Create and Customize Reports

To create, edit, and delete reports in public and private folders:

Report Builder OR Report Builder (Lightning Experience)

To enable data collection

View Setup and Customize Application

To view and access Data 360 reports:

Data 360 User

To collect generative AI audit and feedback data, [Set Up Einstein Generative AI Audit and Feedback](#).

After you enable audit and feedback data collection, data becomes visible in Data 360 within approximately 24 hours. Subsequently, hourly streams of data from the agent generations, and the user feedback, including instruction adherence metrics, are continuously sent to Data 360. This data is then mapped into data lake objects (DLOs) and data model objects (DMOs). Instruction Adherence data is stored in Content Category DMO.

You'll create two Data 360 reports: one to list all collected instruction adherence scores their explanations, and one with the associated agent responses. You can use this report to monitor and analyze how well the agent interprets the topic instructions. The second report can be used to see the related agent response for an individual instruction adherence score.

1. On the Reports tab, click **New Report**.
2. For the category, select **Data Cloud**, and select **GenAIContentCategory** for the report type.
3. Click **Start Report**.
4. On the Outline tab, select these columns.
 - Detector Type
 - Category
 - Value
 - Parent
 - Timestamp
5. On the **Filters** tab, select **Detector Type** for the field, **equals** for the Operator, and type

InstructionAdherence for the value. When you run the report, the **Category** column indicates the level of instruction adherence: high, low, or uncertain.

To limit the report to show only the instances of high or low adherence, you can add another filter.

6. Click **Save and Run** to generate the report. When prompted, give the report a name and description.
7. From the generated report, select one of the items that you want to see the related agent response. Copy the value (parent ID) from the **Parent** column.
8. Next, you'll build a report with the agent responses. From the Reports tab, click **New Report**.
9. For the category, select **Data Cloud**, and select **GenAIGeneration** for the report type.
10. Click **Start Report**. On the **Outline** tab, select these columns.
 - Generation Id
 - Response Text
 - Timestamp
11. On the **Filters** tab, create a filter for **GenerationId** using the parent ID that you copied from the first report you created.
12. Click **Save and Run** to run the report. The report includes the agent response for the item you selected from the instruction adherence report.

See Also

[Instruction Adherence](#)

Task Resolution

Task resolution is an agent guardrail that evaluates how well your agents interpret the user's intent, as expressed in a given conversation, and how well it resolves the task.

REQUIRED EDITIONS

Available in: Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Foundations or Agentforce 1 editions. Setup for AI agents is available on the desktop site.

Task Resolution measures how effectively the agent understands and resolves the user's task over the course of a multi-turn conversation. The metric evaluates whether the AI assistant delivered a meaningful outcome that satisfies the user's intent expressed in the conversation.

 **Note** Task Resolution is supported for agents created with the new Agentforce Builder.

Task Resolution Scores

The metric produces structured, non-binary outputs for each conversation. The task was not handled, was misunderstood, or was left unaddressed.

Score	Description
Fully	Indicates that the agent handled all parts of the task.

Score	Description
Resolved	
Partially Resolved	Indicates that the agent handled some tasks but gaps remain.
Unresolved	Indicates that the agent didn't handle the tasks or address the query.

Explanations for Outcomes That Aren't Fully Resolved

Additionally, reasoning is captured for any outcome that is not Fully Resolved. This reasoning explains why the conversation failed to reach full resolution.

Scores and Explanations Logged in the Generative AI Audit Trail

Task Resolution scores and explanations are logged in the Einstein Generative AI Audit and Feedback data model in Data 360, which must be turned on in your org (see [Set Up Einstein Generative AI Audit and Feedback](#)).

Use this information to see how well your agent is interpreting user intent and delivering on what's requested. It can also help you determine whether the topic instructions need improvement or if additional instructions are needed. See [Best Practices for Writing Topic Instructions and Troubleshooting Agents](#).

Monitor and Track Task Resolution

Get insights from the collected data to spot trends, interpret results, and remedy agent issues.

- Build your own Data 360 dashboards and reports. To learn more, including required permissions, see [Data 360 Reports and Dashboards](#).
- Run queries

Here are relevant attributes associated with Task Resolution in the Einstein Generative AI Content Quality DMO in the [Data Model for Generative AI Audit and Feedback](#).

Attribute	Description	Example
<code>id</code>	Unique event ID	
<code>parent</code>	Generation ID (links to the agent response)	
<code>detectorType</code>	Metric name	<code>TaskResolution</code>
<code>category</code>	Evaluation result	<code>FULLY_RESOLVED</code> , <code>PARTIALLY_RESOLVED</code> ,

Attribute	Description	Example
		UNRESOLVED
value	Explanation text	User intent was to...
orgId	Customer org ID	
cloud	Cloud type	einstein
timestamp	Event timestamp	

See Also

[Instruction Adherence](#)

Extend Your Agentforce Implementation

Explore more advanced use cases with the help of our API and Developer guides. You can also call an agent from a Flow or Apex class.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

[Call an Agent from a Flow or Apex Class](#)

Give your users access to your agent's topics, actions, and reasoning capabilities to automate repetitive tasks and provide real-time assistance. Use invocable actions to call an Agentforce Service agent, Agentforce Employee agent, or Agentforce (Default) from a flow or Apex class. You can call an agent to complete background or event-driven tasks from anywhere that you can invoke a flow or Apex class.

[Agentforce and Generative AI for Developers](#)

Build powerful applications for your business with Agentforce and generative AI developer features.

Call an Agent from a Flow or Apex Class

Give your users access to your agent's topics, actions, and reasoning capabilities to automate repetitive tasks and provide real-time assistance. Use invocable actions to call an Agentforce Service agent, Agentforce Employee agent, or Agentforce (Default) from a flow or Apex class. You can call an agent to complete background or event-driven tasks from anywhere that you can invoke a flow or Apex class.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

 **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

Salesforce provides custom and standard invocable actions for calling an agent from a flow or Apex class.

Custom Agent Invocable Actions

Custom agent invocable actions handle more of the conversation automatically, and we recommend them for most use cases. Salesforce provides a custom agent invocable action for each Agentforce Service agent, Agentforce Employee agent, and Agentforce (Default) in your org.

Custom agent invocable actions make it easy to configure your agent's behavior with clicks, not code. For example, when you add a custom agent invocable action to an Apex class or flow, you use a UI to specify the conditions that trigger the agent, the task to complete, and the data needed to complete the task. You define the task for the agent to complete by specifying a user message. The agent uses it to select topics and actions, just like if a user had asked a question or made a request in a chat window. You can also define the fields that you want your agent to respond with, and then use those field values in your flow or Apex class.

Consider adding multiple custom agent invocable actions to a flow or Apex class depending on your use case. For example, you can call an agent to summarize a service case and then make a second call to use that summary to draft an email response. You can call the same agent multiple times from the same flow to handle separate but related tasks. Or you can call multiple agents from the same flow to handle more specialized tasks.

Standard Agent API Invocable Actions

Standard Agent API invocable actions give you direct access to [the Agent API](#) from a flow or Apex class. They provide more granular control over the agent's behavior during a session than custom agent invocable actions, but they require additional configuration. We recommend them for advanced use cases only.

For example, use the End Session action to make sure a session ends when certain conditions are met. Or use the Submit Feedback action to collect user feedback on the conversation and store it in Data Cloud.

Salesforce provides the following standard Agent API actions.

- End Session
- Send Message

- Start Session
- Submit Feedback

Learn more about Agent API actions in [Agent API Flow Core Actions](#).

Custom agent invocable actions and standard agent API invocable actions aren't supported for Experience Cloud site users and [Platform Integration User](#). The Platform Integration User is also referred to as the System User or system context.

Flows that call an Agentforce Service agent run in the context of [the agent user](#). Flows that call an Agentforce Employee agent or Agentforce (Default) run in the context of the authenticated end user.

In flows, you can only call custom agent invocable actions and standard agent API invocable actions in asynchronous paths, not in a paths that run immediately.

Prepare to Call an Agent from an Apex Class or Flow

[Create an Agentforce Service agent, Agentforce Employee agent, or Agentforce \(Default\)](#).

Prepare your agent's topics and actions. Because standard topics and actions are designed for conversational use cases, they may not work as expected with agent invocable actions. Consider removing standard topics and actions from your agent and creating custom actions for your use cases.

Custom agent invocable actions don't support custom variables or these standard context variables: \$Context.EndUserId, \$Context.RoutableId, \$Context.EndUserLanguage, and \$Context.EndUserContactId.

If you're using an Agentforce Service agent, make sure that your agent has the necessary access to any records used by your agent actions. For example, if you want your agent to be able to summarize a case, create a permission set and modify the object settings to grant read access for the Case object. Then assign the permission set to [the agent user](#).

[Set Up a Custom Agent Invocable Action in Flow Builder](#)

Add a custom agent invocable action to a new or existing flow to complete a task automatically with your Agentforce Service agent or default Agentforce agent.

[Custom Agent Invocable Action: Example Apex Classes](#)

Call a custom agent invocable action from an Apex class to complete a task automatically with your Agentforce Service agent or default Agentforce agent. The Apex class must return the agent's response.

See Also

[Video: Invoke Agents with Apex Invocable Actions](#)

Set Up a Custom Agent Invocable Action in Flow Builder

Add a custom agent invocable action to a new or existing flow to complete a task automatically with your Agentforce Service agent or default Agentforce agent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise, Performance, Unlimited, and Developer Editions. Required add-on licenses vary by agent type.

! **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

User Permissions Needed	
To create an agent invocable action associated with an Agentforce Service agent:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application
To create an agent invocable action associated with an Agentforce Employee agent:	Manage AI Agents OR Customize Application
To create an agent invocable action associated with Agentforce (Default):	Manage AI Agents AND the required permissions for your agent type OR Customize Application
To open, edit, or create a flow in Flow Builder:	Manage Flow

If you haven't already, [prepare to call an agent from an Apex class or flow](#).

1. In Flow Builder, select **Action**. Then, from the AI Agent Actions category, select the custom invocable action for the agent that you want to call from your flow.
Only invocable actions associated with active agents are listed.
2. Enter a name for your action and an optional description.
3. In the User Message field, enter a sample user message to the agent that defines the task to complete. The agent uses the utterance to search through the topics and actions assigned to it to identify the

right action or actions for the task.

For example, “Generate a summary of the incoming service case in less than 100 characters.”

4. (Optional) In the Resource field, select variables to include in the message.

Add the elements you want to reference in the user message prior to the agent invocable action in the flow. For example, to fetch the ID for a record in the user message, add the Get Records element to your flow.

Don’t include context variables in the user message. Instead, use input fields.

5. (Optional) Specify a session ID for the conversation with the agent.

If you include multiple invocable actions associated with the same agent in your flow, you can use the session ID as an input in subsequent actions. If you don’t specify a session ID, a new session is created.

6. (Optional) If your invocable action is on version 1.1.0, click **Configure** in the Edit Structured Output section and then define at least one structured output field.

When you edit an invocable action’s stuctured output, the changes applies to earlier versions of the flow, including active versions.

7. (Optional) If your invocable action calls an Agentforce Service agent, the context variables that you added to the agent populate as inputs. To use a context variable as input, map it to a variable. If you don’t want to use a context variable, leave the field blank. Use Agentforce Builder to add or remove context variables.

8. (Optional) If your invocable action is on version 1.1.0, define the fields that you want the action to return as output to the flow. To make sure that the action always returns a specific field, mark the field as required.

9. Save your changes.

10. When you’re ready, give your users access and activate your flow.

To test your agent’s topic and action configuration, in Agentforce Builder, enter your user message in the preview conversation. To preview your agent’s response, use the Debug Flow feature in Flow Builder. Apex testing isn’t supported for custom agent invocable actions.

If your invocable action is on version 1.1.0, the agent responds with an Apex object that includes the fields you specified.

If your invocable action is on version 1.0.0, the agent responds with a text-string response. You can use an Apex class in a flow to parse the agent response. See [Extend Flows with Apex](#).

```
{  
    sessionId: "uuid",  
    message: {  
        type: text,  
        value: AGENT RESPONSE  
    }  
}
```

See Also

[Trailhead: Quick Start: Explore the Automation Components Sample App](#)

[Flow Core Action: AI Agent Actions](#)

Custom Agent Invocable Action: Example Apex Classes

Call a custom agent invocable action from an Apex class to complete a task automatically with your Agentforce Service agent or default Agentforce agent. The Apex class must return the agent's response.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

! **Important** Starting June 17, 2025, Agentforce (Default) will not include new features or improvements. Existing agents will continue to function, but this agent type will no longer be available in new Salesforce environments. We recommend migrating to Agentforce Employee Agent for continued enhancements and support. See [Migrate from Agentforce \(Default\) to Agentforce Employee Agent](#).

User Permissions Needed	
To create an agent invocable action associated with Agentforce (Default):	Manage AI Agents AND the required permissions for your agent type OR Customize Application
To create an agent invocable action associated with Agentforce Service Agent:	Manage Agentforce Service Agents AND Manage AI Agents OR Customize Application

This Apex class calls the default Agentforce agent using version 1.1.0 of the custom agent invocable action. It returns an email using the CaseEmail Apex class and a case ID.

```
public class AgentIAInvoker {  
    public static void invokeJavaAction() {  
        try {  
            // Create an instance of the invocable action with type 'generateAiAgentResponse', API name 'Acme_Agent', and version 1.1.0  
            Invocable.Action action = Invocable.Action.createCustomAction('generateAiAgentResponse', null, 'Acme_Agent', '1.1.0');  
        }  
    }  
}
```

```

        action.setInvocationParameter('userMessage', 'Generate an email with a
summary of the case');
        action.setInvocationParameter('caseId', '500VW0XXXXXXXXXXXXXX');
        action.setInvocationParameter('apexClassName', 'CaseEmail');

        // Execute the action
        List results = action.invoke();

        // Handle the response
        System.debug('Result is: ' + results[0].getOutputParameters().get('str
ucturedAgentResponse'));
    }
}
}
}

```

This Apex class calls an Agentforce Service agent using version 1.0.0 of the custom agent invocable action. It returns a summary based on the lead ID.

```

public class AgentIAInvoker {
    public static void invokeJavaAction() {
        try {

            // Create an instance of the invocable action with type 'generateAiA
gentResponse' and name 'Agentforce_Service_Agent_new'
            Invocable.Action action = Invocable.Action.createCustomAction('gener
ateAiAgentResponse', null, 'Agentforce_Service_Agent_new', '1.0.0');

            action.setInvocationParameter('userMessage', 'Summarize my contac
t');
            action.setInvocationParameter('leadId', '500VW0XXXXXXXXXXXXXX');

            // Execute the action
            List<Invocable.Action.Result> results = action.invoke();
            Invocable.Action.Result result = results[0];

            // Handle the response
            if (result.isSuccess()) {
                // Retrieve the Session ID and Agent Response
                System.debug('Output Session ID: ' + result.getOutputParameter
s().get('sessionId'));
                System.debug('Output Agent Response: ' + result.getOutputParamet
ers().get('agentResponse'));

            } else {
        }
    }
}
}
}

```

```
        System.debug('Java action execution failed: ' + result.getError  
s());  
    }  
}  
} catch (Exception e) {  
    System.debug('Error invoking Java action: ' + e.getMessage());  
}  
}  
}  
}
```

Agentforce and Generative AI for Developers

Build powerful applications for your business with Agentforce and generative AI developer features.

The Agentforce Developer Guide provides guidance for developers using AI agents and generative AI features. This guide contains developer information for Prompt Builder, Einstein Studio, Models API, and Agentforce. Access large language models (LLMs) through Apex classes and REST endpoints. Communicate with AI agents using a REST API. Our partners, including Anthropic, Google, and OpenAI, provide the models, while the Einstein Trust Layer protects your data and your users with each interaction.



	<p>Learn about Agentforce and Einstein Generative AI for developers.</p> <ul style="list-style-type: none">• Get Started with Agentforce and Generative AI• Get Started with Agent Script• Get Started with Agentforce DX• Get Started with Agentforce APIs and SDKs• Get Started with Models API• Get Started with Prompt Builder
	<p>Use Trailhead to build and test your skills.</p> <ul style="list-style-type: none">• Get Started with the Models API• Agentforce for Developers• Prompt Builder Basics

	<p>Write code with Agentforce and Einstein Generative AI.</p> <ul style="list-style-type: none">• Agent Script Examples• Agent API Examples• Apex Examples with Models API• REST Examples with Models API• Lightning Web Components with Models API• LLM Open Connector Examples
	<p>Watch these videos to see generative AI developer features in action.</p> <ul style="list-style-type: none">• Build a Lightning Web Component with the Models API• Access the Models REST API• More videos at the Agentforce Developer Center

Explore this developer guide to learn how to develop applications with generative AI.



See Also

[Agentforce Developer Guide](#)

Agentforce Standard Asset Reference

Get to know Salesforce standard agent topics, actions, and more with our comprehensive reference libraries, so you can quickly add powerful out-of-the-box functionality to your AI agents.

[Standard Agent Connection Reference](#)

Each connection gives your agent context about specific channels.

[Standard Adaptive Response Format Reference](#)

Standard adaptive response formats are included with standard connections and are built to work with specific channels, interfaces, or apps.

Standard Agent Action Reference

Standard actions are included by default with your agents. Many standard agent actions are available to all users who have permission to access Agentforce. Other standard actions are built to work with specific clouds or products, so they require an additional license or permission. When you add a standard action to your agent, customize the action for your use case, including the underlying flow, prompt template, or

other reference action.

-  **Note** Some AI Agent actions are in beta and have limited functionality, as further described in the Documentation. Including them in an agent is part of the Services and will consume Einstein Requests if enabled and used.

Explore the comprehensive reference library for agent standard actions.

Jump to category:

- [Agentforce IT Service](#)
- [Agentforce Platform](#)
- [Asset Service Management](#)
- [Automotive](#)
- [B2B Commerce](#)
- [B2C Commerce](#)
- [Channel Revenue Management](#)
- [Collections and Recovery](#)
- [Communications](#)
- [Digital Lending](#)
- [Education Cloud](#)
- [Experience Builder](#)
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- [Program Based Business](#)
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- [Public Sector](#)
- [Revenue](#)
- [Sales](#)
- [Sales Agreement](#)
- [Scheduler](#)
- [Security](#)
- [Service](#)

- Setup
- Slack
- Swarming
- Timesheets
- Unified Catalog
- Volunteer Management

Agentforce IT Service

Action	Editions
Add Comment to Record	Available in: Agentforce for Service add-on.
Answer Policy Question	Available in: Agentforce for Service add-on.
Associate Related Records For Incident	Available in: Agentforce for Service add-on.
Associate Related Records for Problem	Available in: Agentforce for Service add-on.
Check Incident Attributes	Available in: Agentforce for Service add-on.
Check Problem Attributes	Available in: Agentforce for Service add-on.
Create Incident Resolution Summary	Available in: Agentforce for Service add-on.
Create Incident Root Cause Summary	Available in: Agentforce for Service add-on.
Create Problem Resolution Summary	Available in: Agentforce for Service add-on.
Create Problem Root Cause Summary	Available in: Agentforce for Service add-on.
Create Service Catalog Request	Available in: Agentforce for Service add-on.
Employee Incident Creation	Available in: AI Agent for Employees.
Evaluate Problem Creation Requirement	Available in: Agentforce for Service add-on.
Generate Post-incident Review	Available in: Agentforce for Service add-on.
Get Incidents Based on Description	Available in: Agentforce for Service add-on.
Get Service Catalog Attributes	Available in: Agentforce for Service add-on.
Identify Service Catalog Item	Available in: Agentforce for Service add-on.
Post Swarming Summary to Feed Item	Available in: Agentforce for Service add-on.
Propose Resolution Summary for Incident	Available in: Agentforce for Service add-on.
Propose Resolution Summary for Problem	Available in: Agentforce for Service add-on.

Action	Editions
Reopen a Ticket	Available in: Agentforce for Service add-on.
Retrieve Assigned Assets	Available in: Agentforce for Service add-on.
Summarize Change Request	Available in: Agentforce for Service add-on.
Summarize Incident	Available in: Agentforce for Service add-on.
Summarize Incident for Employees	Available in: AI Agent for Employees.
Summarize Multiple Incidents	Available in: Agentforce for Service add-on.
Summarize Problem	Available in: Agentforce for Service add-on.
Summarize Release	Available in: Agentforce for Service add-on.

Agentforce Platform

Action	Editions
Answer Questions with Knowledge	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Draft or Revise Email	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Extract Fields and Values from User Input	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Record Details	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Identify Object by Name	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Identify Record by Name	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Query Records	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Query Records with Aggregate	Available in: Enterprise, Performance, Unlimited, and

Action	Editions
	Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Search the Web	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Send Email with Verification Code	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Summarize Record	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Update Record	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Verify Customer	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.

Asset Service Management

Action	Editions
Create Service Quote	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Create Service Work Order	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Asset Warranties	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Price Books	Available in: Enterprise, Performance, and Unlimited Editions

Action	Editions
	with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Products	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Service Quote	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Summarize Asset Performance	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Summarize Vehicle Performance	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Automotive

Action	Editions
Create Opportunity and Opportunity Product	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Create Vehicle Appraisal	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Action	Editions
Create Payment Deferral Case	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Create Payment Due Date Modification Case	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Automotive Financial Accounts for Service Processes	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Available Appointment Slots	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Dealers for Search Criteria	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Financial Accounts for a Customer	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Updated Terms for Payment Deferral	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Updated Terms for Payment Due Date Modification	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access

Action	Editions
	the action.
Get Vehicles for a Customer	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Schedule Automotive Appointment	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Search Vehicle Definitions	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Summarize Customer Account	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Summarize Customer Finance Profile	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Summarize Financial Account for Customer	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

B2B Commerce

Action	Editions
Add Order to Cart	Available in: Enterprise, Unlimited, and Developer Editions with B2B Commerce.
Create Promotions	Available in: Enterprise, Unlimited, and Developer Editions

Action	Editions
	with B2B Commerce.
Format Commerce Insights	Available in: Enterprise, Unlimited, and Developer Editions with B2B Commerce.
Get Commerce Business Objectives	Available in: Enterprise, Unlimited, and Developer Editions with B2B Commerce.
Get Commerce Promotion Templates	Available in: Enterprise, Unlimited, and Developer Editions with B2B Commerce.
Get Most Recent Orders	Available in: Enterprise, Unlimited, and Developer Enterprise Editions with B2B Commerce.
Get Shopper Effective Accounts in Commerce	Available in: Enterprise, Unlimited, and Developer Editions with B2B Commerce.
Look Up Order Summary for Commerce	Available in: Enterprise, Unlimited, and Developer Editions with B2B Commerce.

B2C Commerce

Action	Editions
Add Item To Cart	Available in: Enterprise, Unlimited, and Developer Editions with B2C Commerce.
Answer Product FAQs	Available in: Enterprise, Unlimited, and Developer Editions with B2C Commerce.
Apply Coupon to B2C Commerce Cart	Available in: Developer, Unlimited, and Enterprise Editions with B2C Commerce.
Get B2C Commerce Conversational Context Questions	Available in: Developer, Unlimited, and Enterprise Editions with B2C Commerce.
B2C Commerce Product Search	Available in: Enterprise, Unlimited, and Developer Editions with B2C Commerce.
Get B2C Order Confirmation Details	Available in: Enterprise, Unlimited, and Developer Editions with B2C Commerce.
Get B2C Product By ID	Available in: Enterprise, Unlimited, and Developer Editions with B2C Commerce.
Get B2C Product Details	Available in: Enterprise, Unlimited, and Developer Editions with B2C Commerce.
Get B2C Product Recommendations	Available in: Enterprise, Unlimited, and Developer Editions

Action	Editions
	with B2C Commerce.
Get B2C User Access Token	Available in: Enterprise, Unlimited, and Developer Editions with B2C Commerce.
Search for B2C Order	Available in: Enterprise, Unlimited, and Developer Editions with B2C Commerce.
Edit Cart	Available in: Enterprise, Unlimited, and Developer Editions with B2C Commerce.
View Cart	Available in: Enterprise, Unlimited, and Developer Editions with B2C Commerce.

Channel Revenue Management

Action	Editions
Get Aggregate Sources for a Member	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Aggregate Summary	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Payout Periods For a Member	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Rebate Type Payouts For a Member	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Rebate Type Payout Sources	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access

Action	Editions
	the action.
Summarize Rebate Payouts by Period	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Summarize Rebate Payouts for a Member	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Summarize Rebate Type Payout Source	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Collections and Recovery

Action	Editions
Compile Script for Next Call Based on Previous Collections Interactions	Financial Services Cloud: Enterprise, Performance, and Unlimited Editions with the Einstein for Financial Services add-on license.
Create Case and Related Case Proceeding Records	Financial Services Cloud: Enterprise, Performance, and Unlimited Editions with the Einstein for Financial Services add-on license.
Create Promise to Pay	Financial Services Cloud: Enterprise, Performance, and Unlimited Editions with the Einstein for Financial Services add-on license.
Generate and Send Payment Link	Financial Services Cloud: Enterprise, Performance, and Unlimited Editions with the Einstein for Financial Services add-on license.
Get Payment Method Sets for Merchant Account	Financial Services Cloud: Enterprise, Performance, and Unlimited Editions with the Einstein for Financial Services add-on license.
Request Payment Extension	Financial Services Cloud: Enterprise, Performance, and Unlimited Editions.

Action	Editions
Get Collection Plan Details by Name	Financial Services Cloud: Enterprise, Performance, and Unlimited Editions.
Get Collection Plans for Related Contact and Parties	Financial Services Cloud: Enterprise, Performance, and Unlimited Editions.
Update Representative Contact for Collections	Financial Services Cloud: Enterprise, Performance, and Unlimited Editions.
Answer Collections Queries	Financial Services Cloud: Enterprise, Performance, and Unlimited Editions.

Communications

Action	Editions
Get Account Record	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get All Invoices	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get Invoice Charges	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get Account Balance	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get Invoice Details	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

Action	Editions
Create Billing Dispute Case	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get Payment History	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get Service Level Objective Insights For Asset	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get Group Suggestions	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get Quote Location Count	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get Recipient Grouping Criteria	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get Quote Location Fields	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Create Quote Recipient Groups	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-

Action	Editions
	on to access the action.
Update Quote Recipient Group Name	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get Add-On Products	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get Cross-Sell Products	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Get Upgrade Products	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Create Sales Quote	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.
Format Product Recommendations	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Communications add-on license or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

Digital Lending

Action	Editions
Retrieve Loan Product Categories	Available in: Professional, Enterprise, and Unlimited Editions.
Retrieve Products By Category	Available in: Professional, Enterprise, and Unlimited Editions.

Action	Editions
Retrieve Product Details	Available in: Professional, Enterprise, and Unlimited Editions.
Retrieve Programs By Product	Available in: Professional, Enterprise, and Unlimited Editions.
Retrieve Program Details	Available in: Professional, Enterprise, and Unlimited Editions.
Analyze Estimated Loan Amount	Available in: Professional, Enterprise, and Unlimited Editions.

Education Cloud

Action	Editions
Create Academic Interest (Beta)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Create Admissions Application (Beta)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Create Campus Tour Registration	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the applicable Agentforce add-on license.
Create Course Offering Channel	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the applicable Agentforce add-on license.
Create Inquiry	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the applicable Agentforce add-on license.
Find Advising Cases	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the applicable Agentforce add-on license.
Find Campus Resources	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the applicable Agentforce add-on license.
Get Academic Term Data (Beta)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Campus Tour Campaigns	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the applicable Agentforce add-on license.

Action	Editions
Get Course Syllabus Canvas Layout	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the applicable Agentforce add-on license.
Get Learning Courses (Beta)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the applicable Agentforce add-on license.
Get Learning Program Data (Beta)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the applicable Agentforce add-on license.
Get Program Term Application Timeline Data (Beta)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the applicable Agentforce add-on license.
Summarize Advising Case	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the applicable Agentforce add-on license.
Suggest Student Goals (Beta)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the Agentforce for Education Cloud, Einstein for Education Cloud, and Flex Credits Metering add-on licenses.
Create Goal (Beta)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Education Cloud and the Agentforce for Education Cloud, Einstein for Education Cloud, and Flex Credits Metering add-on licenses.

Experience Builder

Action	Editions
Draft Text for Experience Builder Site (Beta)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.

Field Service

Action	Editions
Assign Appointment to Service Resource for Field Service	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce or Einstein for Field Service or Industry add-on license or included in Einstein 1 Edition or

Action	Editions
	Agentforce 1 Edition for Sales. Requires each user to have the Agentforce or Einstein for Field Service or Industry add-on to access the action.
Cancel Appointment for Field Service	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Create Appointment for Field Service	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Create Appointment List Filter for Field Service	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce or Einstein for Field Service or Industry add-on license or included in Einstein 1 Edition or Agentforce 1 Edition for Sales. Requires each user to have the Agentforce or Einstein for Field Service or Industry add-on to access the action.
Get Appointment Information for Field Service	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Get Appointment Time Slots for Field Service	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Get Appointments By Criteria for Field Service	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Get Appointments to Fill Gaps for Field Service	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce or Einstein for Field Service or Industry add-on license or included in Einstein 1 Edition or Agentforce 1 Edition for Sales. Requires each user to have the Agentforce or Einstein for Field Service or Industry add-on to access the action.
Get Current Time for Field Service	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.

Action	Editions
Get Engagement Topics for Field Service	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Get Work Types for Field Service	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Rebook and Notify for Field Service	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Refine Post-Work Summary for Field Service	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce or Einstein for Field Service or Industry add-on license or included in Einstein 1 Edition or Agentforce 1 Edition for Sales. Requires each user to have the Agentforce or Einstein for Field Service or Industry add-on to access the action.
Schedule Appointment for Field Service	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Summarize Scheduling Issues for Field Service	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce or Einstein for Field Service or Industry add-on license or included in Einstein 1 Edition or Agentforce 1 Edition for Sales. Requires each user to have the Agentforce or Einstein for Field Service or Industry add-on to access the action.
Summarize Service Appointment Notes	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce or Einstein for Field Service or Industry add-on license or included in Einstein 1 Edition or Agentforce 1 Edition for Sales. Requires each user to have the Agentforce or Einstein for Field Service or Industry add-on to access the action.
Update Appointment Times for Field Service	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.

Financial Services

Action	Editions
Create Action Plan	Available in: Professional, Enterprise, and Unlimited Editions.
Create Action Plan Item	Available in: Professional, Enterprise, and Unlimited Editions.
Create Case to Block Card	Available in: Professional, Enterprise, and Unlimited Editions.
Fulfill Fee Reversal	Available in: Professional, Enterprise, and Unlimited Editions.
Create Case for Account Address Update	Available in: Professional, Enterprise, and Unlimited Editions.
Create Case for Change Billing Cycle	Available in: Professional, Enterprise, and Unlimited Editions.
Create Case for Lock Or Unlock Card	Available in: Professional, Enterprise, and Unlimited Editions.
Create Case for Manage Card Settings	Available in: Professional, Enterprise, and Unlimited Editions.
Create Case for Order Checkbook	Available in: Professional, Enterprise, and Unlimited Editions.
Create Case for Request Loan Payoff Statement	Available in: Professional, Enterprise, and Unlimited Editions.
Create Case for Request Statement Copies	Available in: Professional, Enterprise, and Unlimited Editions.
Create Case for Stop Check Payment	Available in: Professional, Enterprise, and Unlimited Editions.
Create Case for Transaction Dispute	Available in: Professional, Enterprise, and Unlimited Editions.
Create Case for Transfer Funds	Available in: Professional, Enterprise, and Unlimited Editions.
Create Case for Travel Notification	Available in: Professional, Enterprise, and Unlimited Editions.
Create Financial Goal	Available in: Professional, Enterprise, and Unlimited Editions.
Create Financial Plan	Available in: Professional, Enterprise, and Unlimited Editions.
Create Interest Tag	Available in: Professional, Enterprise, and Unlimited Editions.
Create Person Life Event	Available in: Professional, Enterprise, and Unlimited Editions.
Create Record Alert	Available in: Professional, Enterprise, and Unlimited Editions.
Create or Update Agenda Draft	Available in: Professional, Enterprise, and Unlimited Editions.
Create Interaction	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Financial Services add-on license or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.

Action	Editions
Create Interaction Summary	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Financial Services add-on license or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.
Create Interaction Attendee	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Financial Services add-on license or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.
Create Account Plan Objective	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Financial Services add-on license or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.
Create Account Plan Objective Measure	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Financial Services add-on license or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.
Create Opportunity Based on Meeting Notes	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Financial Services add-on license or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.
Create Summary Document	Available in: Professional, Enterprise, and Unlimited Editions with the Agentforce for Financial Services add-on license or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.
Extract Action Plans	Available in: Professional, Enterprise, and Unlimited Editions.
Extract Financial Goals	Available in: Professional, Enterprise, and Unlimited Editions.
Extract Financial Plans	Available in: Professional, Enterprise, and Unlimited Editions.
Extract Person Life Events	Available in: Professional, Enterprise, and Unlimited Editions.
FinServ Package Create Financial Goal (FSC Managed Package)	Available in: Professional, Enterprise, and Unlimited Editions.
FinServ Package Create Life Event (FSC	Available in: Professional, Enterprise, and Unlimited Editions.

Action	Editions
Managed Package)	
FinServ Package Extract Financial Goals (FSC Managed Package)	Available in: Professional, Enterprise, and Unlimited Editions.
FinServ Package Extract Life Events (FSC Managed Package)	Available in: Professional, Enterprise, and Unlimited Editions.
FinServ Package Get Client Life Events (FSC Managed Package)	Available in: Professional, Enterprise, and Unlimited Editions.
FinServ Package Structure Financial Advisor Meeting Notes (FSC Managed Package)	Available in: Professional, Enterprise, and Unlimited Editions.
FinServ Package Summarize Financial Details (FSC Managed Package)	Available in: Professional, Enterprise, and Unlimited Editions.
FinServ Package Summarize Financial Goals (FSC Managed Package)	Available in: Professional, Enterprise, and Unlimited Editions.
FinServ Package Summarize Portfolio Performance (FSC Managed Package)	Available in: Professional, Enterprise, and Unlimited Editions.
Get Card Details for Account	Available in: Professional, Enterprise, and Unlimited Editions.
Get Card Settings	Available in: Professional, Enterprise, and Unlimited Editions.
Get Client Life Events	Available in: Professional, Enterprise, and Unlimited Editions.
Get Current Billing Cycle Details	Available in: Professional, Enterprise, and Unlimited Editions.
Get Account Addresses	Available in: Professional, Enterprise, and Unlimited Editions.
Get Account Restraints	Available in: Professional, Enterprise, and Unlimited Editions.
Get Enriched Details of Transactions	Available in: Professional, Enterprise, and Unlimited Editions.
Get Financial Account Balances	Available in: Professional, Enterprise, and Unlimited Editions.
Get Financial Accounts for an Account	Available in: Professional, Enterprise, and Unlimited Editions.
Get Financial Account Transactions	Available in: Professional, Enterprise, and Unlimited Editions.
Get Interactions By Date Range	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Financial Services add-on license or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.
Fetch Request Loan Payoff Statement Details	Available in: Professional, Enterprise, and Unlimited Editions.

Action	Editions
Get New Billing Cycle Details	Available in: Professional, Enterprise, and Unlimited Editions.
Get Reason Code for Transactions	Available in: Professional, Enterprise, and Unlimited Editions.
Get Reason SubCode for Transactions	Available in: Professional, Enterprise, and Unlimited Editions.
Get Topic Config	Available in: Professional, Enterprise, and Unlimited Editions.
Get Transaction Dispute Questionnaire	Available in: Professional, Enterprise, and Unlimited Editions.
Restructure Meeting Notes	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Financial Services add-on license or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.
Review Asset Allocation	Available in: Professional, Enterprise, and Unlimited Editions.
Summarize Account Financial Details	Available in: Professional, Enterprise, and Unlimited Editions.
Summarize Account Record Alerts	Available in: Professional, Enterprise, and Unlimited Editions.
Summarize Agenda Drafts	Available in: Professional, Enterprise, and Unlimited Editions.
Summarize Financial Plans and Goals	Available in: Professional, Enterprise, and Unlimited Editions.
Structure Financial Advisor Meeting Note	Available in: Professional, Enterprise, and Unlimited Editions.
Summarize Household Financial Details	Available in: Professional, Enterprise, and Unlimited Editions.
Summarize Portfolio Performance	Available in: Professional, Enterprise, and Unlimited Editions.

Fundraising

Action	Editions
Create Party Philanthropic Research Profile	Education Cloud: Enterprise, Performance, Unlimited, and Developer Editions with the applicable Agentforce add-on license. Nonprofit Cloud: Enterprise, Unlimited, and Developer Editions with the applicable Agentforce add-on license.
Create Philanthropic Assessment	Education Cloud: Enterprise, Performance, Unlimited, and Developer Editions with the applicable Agentforce add-on license. Nonprofit Cloud: Enterprise, Unlimited, and Developer Editions with the applicable Agentforce add-on license.

Action	Editions
Get Research Profile Canvas Layout	Education Cloud: Enterprise, Performance, Unlimited, and Developer Editions with the applicable Agentforce add-on license. Nonprofit Cloud: Enterprise, Unlimited, and Developer Editions with the applicable Agentforce add-on license.
Summarize Philanthropic Milestones	Education Cloud: Enterprise, Performance, Unlimited, and Developer Editions with the applicable Agentforce add-on license. Nonprofit Cloud: Enterprise, Unlimited, and Developer Editions with the applicable Agentforce add-on license.
Summarize Wealth Capacity	Education Cloud: Enterprise, Performance, Unlimited, and Developer Editions with the applicable Agentforce add-on license. Nonprofit Cloud: Enterprise, Unlimited, and Developer Editions with the applicable Agentforce add-on license.
Close Gift Commitment	Education Cloud: Enterprise, Performance, Unlimited, and Developer Editions with the applicable Agentforce add-on license. Nonprofit Cloud: Enterprise, Unlimited, and Developer Editions with the applicable Agentforce add-on license.
Manage Recurring Gift Commitment	Education Cloud: Enterprise, Performance, Unlimited, and Developer Editions with the applicable Agentforce add-on license. Nonprofit Cloud: Enterprise, Unlimited, and Developer Editions with the applicable Agentforce add-on license.

Health

Action	Editions
Classify Disease Surveillance Cases	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud add-on license.
Execute Generic EMR Request	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud add-on license.
Extract Patient Home Visit Requirements	Available in: Enterprise and Unlimited Editions with the Agentforce for Health add-on license or included in Agentforce 1 Health Edition. Requires each user to have the Agentforce for Health add-on to access the action.
Fetch Individual Record ID	Available in: Enterprise, Performance, and Unlimited Editions

Action	Editions
	with the Agentforce for Health Cloud add-on license.
Find Claim	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud add-on license.
Find Matching Providers	Available in: Enterprise and Unlimited Editions with Health Cloud.
Find Providers Info	Available in: Enterprise and Unlimited Editions with Health Cloud.
Find Specific Member Coverage	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud add-on license.
Generate EMR Data Fetch Payload	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud add-on license.
Generate FHIR Payload	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud add-on license.
Generate FHIR Payload for Eligibility and Benefit Verification	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud Add-on license.
Generate Patch FHIR Payload	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud add-on license.
Get Claim Summary	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud add-on license.
Get Input for Eligibility and Benefit Verification	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud Add-on license.
Get Member Coverage Summary	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud add-on license.
Get Patient Data from EMR	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud Add-on license.
Get Patient Member Plans	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud Add-on license.
Register a Patient in EMR	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud Add-on license.
Send Eligibility and Benefit Verification Request	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud Add-on license.
Summarize Disease Investigation Details	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Health Cloud add-on license.
Summarize Disease Surveillance Case	Available in: Enterprise, Performance, and Unlimited Editions

Action	Editions
	with the Agentforce for Health Cloud add-on license.
Summarize Patient Healthcare Details	Available in: Enterprise and Unlimited Editions with the Agentforce for Health add-on license or included in Agentforce 1 Health Edition. Requires each user to have the Agentforce for Health add-on to access the action.
Summarize Patient Home Healthcare Details	Available in: Enterprise and Unlimited Editions with the Agentforce for Health add-on license or included in Agentforce 1 Health Edition. Requires each user to have the Agentforce for Health add-on to access the action.

Insurance

Action	Editions
Fetch Asset	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Fetch Policies	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Fetch Participant	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Generate Proof of Insurance	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Insurance Quote Details	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Summarize Insurance Policyholder	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.

Inventory Management

Action	Editions
Create Product Request	Available in: Enterprise, Performance, and Unlimited Editions

Action	Editions
	with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Search Criteria and Results	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Summarize Inventory Details	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Life Sciences

Action	Editions
Add Site and Investigator to Study	Available in: Enterprise and Unlimited Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.
Add Sites Search Results to Study	Available in: Enterprise and Unlimited Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.
Generate Healthcare Provider Summary	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Life Sciences add-on license or included in Agentforce 1 Life Sciences Edition. Requires each user to have the Agentforce for Life Sciences add-on to access the action.
Get Omniscript IDs From Research Study	Available in: Enterprise and Unlimited Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

Action	Editions
Get Site Search Filters for Research Study	Available in: Enterprise and Unlimited Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.
Go to Care Program Sites	Available in: Enterprise and Unlimited Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.
Send Site Feasibility Assessments	Available in: Enterprise and Unlimited Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.
Summarize Investigator	Available in: Enterprise and Unlimited Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.
Summarize Patient Response for Benefits Reverification	Available in: Enterprise and Unlimited Editions with Health Cloud or Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.
Summarize Site	Available in: Enterprise and Unlimited Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

Loyalty Management

Action	Editions
Add or Update Limit in Pricing Promotion	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Agentforce, Loyalty Management, Salesforce Foundations, and Data Cloud.

Action	Editions
Create or Update Pricing Promotion	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Agentforce, Loyalty Management, Salesforce Foundations, and Data Cloud.
Create or Update Promotion using Accrual Promotion Template	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Agentforce, Loyalty Management, Salesforce Foundations, and Data Cloud.
Create or Update Promotion Using a Spend X Template	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Agentforce, Loyalty Management, Salesforce Foundations, and Data Cloud.
Generate Loyalty Promotion Email	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Agentforce, Loyalty Management, Salesforce Foundations, and Data Cloud.

Manufacturing

Action	Editions
Get Aggregate Sources for a Member	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Create Sales Agreements Bulk Update Request	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Forecasts to Opportunities Filter Criteria	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
OpportunityJsonBuilder	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Create Product Request	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or

Action	Editions
	included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Create Service Quote	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Create Service Work Order	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Create Visit	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Get Aggregate Summary	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Get Asset Warranties	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Get Attribute Details	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Get Rebate Type Payout Sources	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Get Search Criteria and Results	Available in: Enterprise, Performance, and Unlimited Editions

Action	Editions
	with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Get Service Quote	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Get Price Books	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Get Products	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Get Payout Periods For a Member	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Perform Bulk Update for Sales Agreement Metrics	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Get Rebate Type Payouts For a Member	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Summarize Asset Performance	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

Action	Editions
Summarize Inventory Details	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Summarize Rebate Payouts for a Member	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Summarize Rebate Payouts by Period	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Summarize Rebate Type Payout Source	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Summarize Sales Agreement Performance	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.
Forecast to Opportunity Execution	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Manufacturing add-on license or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

Marketing

Action	Editions
Create Journey Content	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in Enterprise and Unlimited Editions with Marketing Cloud Next and Marketing Cloud Engagement+.

Action	Editions
Draft a Campaign Brief	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in Enterprise and Unlimited Editions with Marketing Cloud.
Draft a Campaign Preview	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in Enterprise and Unlimited Editions with Marketing Cloud.
Draft Content	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on and in Enterprise and Unlimited Editions with Marketing Cloud.
Create Section with Content	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on and in Enterprise and Unlimited Editions with Marketing Cloud.
Generate Campaign Insights	Available in: Enterprise and Unlimited Editions with Foundations and Marketing Cloud Next.
Get Campaign Objectives (Beta)	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in Enterprise and Unlimited Editions with Marketing Cloud.
Get Channel Types (Beta)	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in Enterprise and Unlimited Editions with Marketing Cloud.
Get Low Performing Ads (Beta)	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in Enterprise and Unlimited Editions with Marketing Cloud.
Get Metrics (Beta)	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in Enterprise and Unlimited Editions with Marketing Cloud.
Get Score for Record ID	Available in: Salesforce Enterprise and Unlimited Editions with Marketing Cloud Growth or Advanced Edition.
Identify Business Unit	Available in: Enterprise and Unlimited Editions with

Action	Editions
	Foundations and Marketing Cloud Next.
Refine Campaign Preview	Available in: Enterprise and Unlimited Editions with Foundations and Marketing Cloud Next.
Select Journey	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in Enterprise and Unlimited Editions with Marketing Cloud Next and Marketing Cloud Engagement+.
Save Campaign	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in Enterprise and Unlimited Editions with Marketing Cloud.
Save Campaign Brief	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in Enterprise and Unlimited Editions with Marketing Cloud.
Sign Up Prospect for B2B Marketing Lists	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Summarize a Campaign	Available in: Enterprise and Unlimited Editions with Marketing Cloud.

Media

Action	Editions
Create Media Opportunity (Beta)	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Media add-on license or included in Agentforce 1 Media Edition. Requires each user to have the Agentforce for Media add-on to access the action.
Create Media Proposal (Beta)	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Media add-on license or included in Agentforce 1 Media Edition. Requires each user to have the Agentforce for Media add-on to access the action.
Find Media Opportunity (Beta)	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Media add-on license or included in Agentforce 1 Media Edition. Requires each user to have the Agentforce for Media add-on to access the action.

Action	Editions
Get Media Products (Beta)	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Media add-on license or included in Agentforce 1 Media Edition. Requires each user to have the Agentforce for Media add-on to access the action.
Get Media Products Based on Targeting (Beta)	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Media add-on license or included in Agentforce 1 Media Edition. Requires each user to have the Agentforce for Media add-on to access the action.
Media Opportunity Summary (Beta)	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Media add-on license or included in Agentforce 1 Media Edition. Requires each user to have the Agentforce for Media add-on to access the action.

Net Zero Cloud

Action	Editions
Combine Snippets	Available in: Enterprise, Performance, and Unlimited Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero Cloud add-on license. Available with the Salesforce Foundations license.
Draft Disclosure Responses	Available in: Enterprise, Performance, and Unlimited Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero Cloud add-on license. Available with the Salesforce Foundations license.
Draft Snippet For Question	Available in: Enterprise, Performance, and Unlimited Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero Cloud add-on license. Available with the Salesforce Foundations license.
Get Vehicle Asset Emission Source Data	Available in: Enterprise, Performance, and Unlimited Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero Cloud add-on license. Available with the Salesforce Foundations license.
Get Stationary Asset Environmental Source Data	Available in: Enterprise, Performance, and Unlimited Editions with Net Zero Cloud Growth license or the Net Zero Cloud

Action	Editions
	User add-on license and the Agentforce for Net Zero Cloud add-on license. Available with the Salesforce Foundations license.
Get Sustainability Stakeholder Data	Available in: Enterprise, Performance, and Unlimited Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero Cloud add-on license. Available with the Salesforce Foundations license.
Manage Sustainability Task Group	Available in: Enterprise, Performance, and Unlimited Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero Cloud add-on license. Available with the Salesforce Foundations license.
Get Sustainability Task Group Data	Available in: Enterprise, Performance, and Unlimited Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero Cloud add-on license. Available with the Salesforce Foundations license.
Create Sustainability Task Group	Available in: Enterprise, Performance, and Unlimited Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero Cloud add-on license. Available with the Salesforce Foundations license.

Omnistudio

Action	Editions
Diagnose Components (Pilot)	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Get Org Objects (Pilot)	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.

Personalization

Action	Editions
Get Context	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or

Action	Editions
	Einstein 1 Editions.
Get Recommendations	Available in: Enterprise, Unlimited, Professional, and Developer Editions with Data Cloud.
Understand User Intent	Available in: Enterprise, Unlimited, Professional, and Developer Editions with Data Cloud.

Program Based Business

Action	Editions
Forecasts to Opportunities Filter Criteria	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Forecast to Opportunity Execution	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
OpportunityJsonBuilder	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Program and Case Management

Action	Editions
Create Participant Benefits	Available in: Enterprise, Professional, Unlimited, and Developer Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license, where Program Management is enabled. Requires each user to have the Agentforce or Einstein add-on to access the action.
Create Referral	Available in: Enterprise, Professional, Unlimited, and Developer Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license, where Program Management is enabled. Requires each user to have the

Action	Editions
	Agentforce or Einstein add-on to access the action.
Get Participant Goal	Available in: Enterprise, Professional, Unlimited, and Developer Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license, where Program Management is enabled. Requires each user to have the Agentforce or Einstein add-on to access the action.
Prepare Participant Notes	Available in: Enterprise, Professional, Unlimited, and Developer Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license, where Program Management is enabled. Requires each user to have the Agentforce or Einstein add-on to access the action.

Public Sector

Action	Editions
Automatically Resolve Complaint	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Check For Regulatory Code Violation	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Create Assessment for Public Complaint	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Create Assessment Question Response	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Create Candidate Leads	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition.

Action	Editions
	Requires each user to have the Agentforce for Public Sector add-on to access the action.
Create Regulatory Code Violation	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Create Regulatory Code Violation for Public Complaint	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Create Regulatory Transaction Fee	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Create Violation Enforcement Action	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Draft Visit Summary Email	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Email Candidate Leads	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Email Complaint Participant	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Find Similar Complaints	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or

Action	Editions
	included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Find Similar Complaints Against Perpetrator	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Find Similar Unresolved Complaints	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Get Assessment Questions	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Get Assessment Question Text and Response Values	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Get Candidates And Create Leads	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Get Candidates with Matched Skills	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Get Examination and Competency Details for Skills	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Get Regulatory Code Violation Details	Available in: Enterprise, Performance, and Unlimited Editions

Action	Editions
	with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Get Relevant Application Forms	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Get Relevant Regulatory Codes	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Get Relevant Skill IDs	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Get Unprocessed Regulatory Codes	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Get Violation Enforcement Actions	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Preview Hiring Managers	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Send Visit Summary Email	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

Action	Editions
Share Application Form with Hiring Manager	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Summarize Application Form	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.
Summarize Public Complaint	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Public Sector add-on license or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

Revenue

Action	Editions
Add Quote Line Item to Quote	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Apply Discount To Quote Line Item	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Create Amendment Quote	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Create Initial Quote	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Create Renewal Quote	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Explain Invoice Line	Available in: Enterprise, Unlimited, and Developer Editions with the Revenue Cloud Billing license with the Agentforce Employee Agent add-on. Contact your Salesforce account executive for more information.
Find Products	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Generate Product Description	Available in: Enterprise and Unlimited Editions of Revenue Cloud that have Product Catalog Management and the

Action	Editions
	Agentforce Employee Agent add-on enabled.
Get Account Assets	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Get Account Balance	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud Advanced and Revenue Cloud Billing with the Agentforce Employee Agent add-on. It requires Einstein GPT, the Agentforce Service Agent add-on, the Flex Credits Metering add-on, and the Usage Management add-on.
Get Invoice Line Records	Available in: Enterprise, Unlimited, and Developer Editions with the Revenue Cloud Billing license with the Agentforce Employee Agent add-on. Contact your Salesforce account executive for more information.
Get Invoice Document PDF	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud Advanced and Revenue Cloud Billing with the Agentforce Employee Agent add-on. It requires Einstein GPT, the Agentforce Service Agent add-on, the Flex Credits Metering add-on, and the Usage Management add-on.
Retrieve Next Due Payment	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud Advanced and Revenue Cloud Billing with the Agentforce Employee Agent add-on. It requires Einstein GPT, the Agentforce Service Agent add-on, the Flex Credits Metering add-on, and the Usage Management add-on.
Generate Payment Plan Details	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud Advanced and Revenue Cloud Billing with the Agentforce Employee Agent add-on. It requires Einstein GPT, the Agentforce Service Agent add-on, the Flex Credits Metering add-on, and the Usage Management add-on.
Get Rule-Based Product Recommendations (Beta)	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Get Product Details	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Get Product Selling Model for Products	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Get Usage Details	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud Advanced and Revenue Cloud Billing with the Agentforce Employee Agent add-on. It requires Einstein GPT, the Agentforce Service Agent add-on, the Flex Credits

Action	Editions
	Metering add-on, and the Usage Management add-on.
Query Contract Document	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Sales, Agentforce for Platform, or Agentforce for Service add-on, Revenue Cloud Advanced, or Agentforce for Industries (X).
Query Quote Line Items	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Summarize Contract Document	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Sales, Agentforce for Platform, or Agentforce for Service add-on, Revenue Cloud Advanced, or Agentforce for Industries (X).
Update Quote Details	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.
Update Quote Line Item Details	Available in: Enterprise, Unlimited, and Developer Editions of Revenue Cloud with the Agentforce Employee Agent add-on.

Sales

Action	Editions
Add Record to Cadence	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Create a Label	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales add-on.
Create a Sales Record	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Create a To-Do	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Create Close Plan	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.

Action	Editions
Explore Conversation	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license and Einstein Conversation Insights. Requires each user to have the Agentforce or Einstein add-on to access the action.
Find Contact Interactions	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Find Past Collaborators	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Find Similar Interactions	Available in: Enterprise, Performance, and Unlimited Editions with Data Cloud enabled, and the Customer Exprc Intel and Einstein GPT Copilot add-ons.
Find Similar Opportunities	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Get Activities Timeline	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Activity Details	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Conversation Intelligence	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license and Einstein Conversation Insights. Requires each user to have the Agentforce or Einstein add-on to access the action.
Get Conversation Transcript	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license and Einstein Conversation Insights. Requires each user to have the Agentforce or Einstein add-on to access the action.
Get Fields to Create Sales Record	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or

Action	Editions
	Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Get Forecast Guidance	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Get Product Pricing	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Identify Contact Role	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Identify Key Contacts	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Label a Record	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Log a Call	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Prioritize Opportunities	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Research Account	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Return Calendar Link	Available in: Enterprise, Performance, and Unlimited Editions.
Review My Day	Available in: Enterprise, Performance, and Unlimited Editions

Action	Editions
	with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Send Meeting Request	Available in: Enterprise, Performance, and Unlimited Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on license. Requires each user to have the Agentforce or Einstein add-on to access the action.
Send Verification Email	Available in: Enterprise, Performance, and Unlimited Editions.
Suggest Next Step for Opportunity	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.
Suggest Stage for Opportunity	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.
Verify Sales Customer	Available in: Enterprise, Performance, and Unlimited Editions.
Coach Give Feedback on Needs Analysis Stage	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions.
Coach Give Feedback on Negotiation/Review Stage	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions.
Coach Give Feedback on Proposal/Price Quote Stage	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions.
Coach Give Feedback on Qualification Stage	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions.
Lead Nurturing Draft Generic Reply Email	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1

Action	Editions
	Editions.
Lead Nurturing Draft Initial Outreach Email	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions.
Lead Nurturing Draft Meeting Request Email	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions.
Lead Nurturing Draft Nudge Email	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions.
Lead Nurturing Opt-Out Lead	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions.
Lead Nurturing Schedule Email	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations or Agentforce 1 Editions.

Sales Agreement

Action	Editions
Create Sales Agreements Bulk Update Request	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Create Visit	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Get Attribute Details	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Perform Bulk Update for Sales Agreement Metrics	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or

Action	Editions
	included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.
Summarize Sales Agreement Performance	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Automotive add-on license or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Scheduler

Action	Editions
Cancel Appointment For Scheduler	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Collect Appointment Details for Scheduler	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Create and Schedule Appointment for Scheduler	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Get Appointment Details for Scheduler	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
Get Appointment Time Slots for Scheduler	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.
List Appointments for Scheduler	Available in: Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions with any Field Service license and access to Agentforce Service agents.

Security

Action	Editions
Classify Security Risk	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Policy Details	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Policies by Object	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Policies by Policy Type	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Security Metric Data	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Security Alerts	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Summarize User Activity	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.

Service

Action	Editions
Add Case Comment	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Cancel Order	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Check Rep Availability for Routing	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.

Action	Editions
Close Case	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Create Case	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Create Case with Enhanced Data	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Create a Sales Contact Record	Available in: Enterprise, Performance, and Unlimited Editions.
Create a Sales Lead Record	Available in: Enterprise, Performance, and Unlimited Editions.
Create a Sales Person Account Record	Available in: Enterprise, Performance, and Unlimited Editions.
Draft Case Response	Available in: Enterprise, Performance, and Unlimited Editions with Data Cloud enabled, and the Customer Exprc Intel and Einstein GPT Copilot add-ons.
Enhance Product Description	Available in: Enterprise, Performance, and Unlimited Editions with Data Cloud enabled, and the Customer Exprc Intel and Einstein GPT Copilot add-ons.
Finalize New Delivery Time	Available in: Enterprise, Performance, and Unlimited Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons.
Finalize Reservation	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Find Similar Cases	Available in: Enterprise, Performance, and Unlimited Editions with Data Cloud enabled, and the Customer Exprc Intel and Einstein GPT Copilot add-ons.
Get All Cases for Contact	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Case By Case Number	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.

Action	Editions
Get Case By Verified Case Number	Available in: Enterprise, Performance, UnlimitedEinstein 1 Edition, Agentforce 1 Edition, and Developer Editions.
Get Cases for Verified Contact	Available in: Enterprise, Performance, Unlimited, and Developer Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on.
Get Delivery Time Slots	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Order by Order Number	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Orders By Contact	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get Reservation Time Slots	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Identify Customer By Email	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Raise Flag for Supervisor	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Reset Password	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Reset Secure Password	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Summarize Product Reviews	Available in: Enterprise, Performance, and Unlimited Editions with Data Cloud enabled, and the Customer Exprc Intel and Einstein GPT Copilot add-ons.
Summarize Service Engagement	Available in: Enterprise, Performance, and Unlimited Editions with Data Cloud enabled, and the Customer Exprc Intel and Einstein GPT Copilot add-ons.
Update Customer Contact	Available in: Enterprise, Performance, UnlimitedEinstein 1

Action	Editions
	Edition, Agentforce 1 Edition, and Developer Editions.
Update Omni-Channel User Configuration	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Update Verified Contact	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.

Setup

Action	Editions
Answer Questions with Salesforce Documentation (Beta)	Available in: Enterprise, Performance, Unlimited Einstein 1 Edition, Agentforce 1 Edition, and Developer Editions.
Create External Client App	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get and Explain Object Permissions of User (Beta)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Get and Explain User Permissions of User (Beta)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Identify Field By Name	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Identify Object By Name (Object Management)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Identify User Permissions by Name (Beta)	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Migrate Connected App	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Summarize OAuth in Connected App	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or

Action	Editions
	Einstein 1 Editions.

Slack

Action	Editions
Add Users to a Slack Channel	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Archive a Slack Channel	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Create a Salesforce Channel in Slack	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Create a Slack Canvas	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Create a Slack Channel	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Create an Account Executive Brief	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
List Slack Workspaces	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Look Up a Salesforce Channel in Slack	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Look Up a Slack User	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Search Slack	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Send a Slack Direct Message	Available in: Enterprise, Performance, Unlimited, and

Action	Editions
	Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Send a Slack Message to a Channel	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Share a Slack Canvas	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Summarize a Channel	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Start a Conversation with an Agent in Slack	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.
Update a Slack Canvas	Available in: Enterprise, Performance, Unlimited, and Developer Editions with Foundations, or Agentforce 1 or Einstein 1 Editions.

Swarming

Action	Editions
Begin Swarm	Available in: Enterprise, Performance, and Unlimited Editions with Einstein for Service add-on.
Check Swarming Preconditions	Available in: Enterprise, Performance, and Unlimited Editions with Einstein for Service add-on.
Complete Swarm	Available in: Enterprise, Performance, and Unlimited Editions with Einstein for Service add-on.
Complete Swarm Creation	Available in: Enterprise, Performance, and Unlimited Editions with Einstein for Service add-on.
Complete Swarm Records	Available in: Enterprise, Performance, and Unlimited Editions with Einstein for Service add-on.
Create Swarm Salesforce Channel	Available in: Enterprise, Performance, and Unlimited Editions with Einstein for Service add-on.
Create Swarm Slack Channel	Available in: Enterprise, Performance, and Unlimited Editions with Einstein for Service add-on.

Action	Editions
Create Swarming Slack Thread	Available in: Enterprise, Performance, and Unlimited Editions with Einstein for Service add-on.
Get Swarm Type and Slack Access Details	Available in: Enterprise, Performance, and Unlimited Editions with Einstein for Service add-on.
Reopen Swarm Procedure	Available in: Enterprise, Performance, and Unlimited Editions with Einstein for Service add-on.
Send Slack Updates	Available in: Enterprise, Performance, and Unlimited Editions with Einstein for Service add-on.
Unarchive Channel	Available in: Enterprise, Performance, and Unlimited Editions with Einstein for Service add-on.

Timesheets

Action	Editions
Create Timesheets and Timesheet Entries	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Timesheets and Labor Cost Optimization add-on license or included in Agentforce 1 Timesheets and Labor Cost Optimization Edition. Requires each user to have the Agentforce for Timesheets add-on to access the action.
Verify Or Submit Timesheet	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Timesheets and Labor Cost Optimization add-on license or included in Agentforce 1 Timesheets and Labor Cost Optimization Edition. Requires each user to have the Agentforce for Timesheets add-on to access the action.
Get Timesheet Details	Available in: Enterprise, Performance, and Unlimited Editions with the Agentforce for Timesheets and Labor Cost Optimization add-on license or included in Agentforce 1 Timesheets and Labor Cost Optimization Edition. Requires each user to have the Agentforce for Timesheets add-on to access the action.

Unified Catalog

Action	Editions
Check Product Eligibility	Available in: Enterprise, Unlimited, and Developer Editions

Action	Editions
	with Unified Catalog and the Agentforce Employee Agent add-on license.
Launch Service Process	Available in: Enterprise, Unlimited, and Developer Editions with Unified Catalog and the Agentforce Employee Agent add-on license.

Volunteer Management

Action	Editions
Find Unfilled Shifts	Available in: Enterprise, Professional, Unlimited, and Developer Editions with the Agentforce for Nonprofits Add On license, or the Agentforce 1 Nonprofit Edition, where Volunteer Management is enabled.
Match Volunteers to Shifts	Available in: Enterprise, Professional, Unlimited, and Developer Editions with the Agentforce for Nonprofits Add On license, or the Agentforce 1 Nonprofit Edition, where Volunteer Management is enabled.

See Also

[Agents and Data Usage](#)

Agentforce IT Service | Add Comment to Record

Adds comments or supplementary information to existing IT tickets through a conversational interface, streamlining the update process by allowing users to identify tickets by number or description without manual navigation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	AddCommentToRecord
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Reference Action Type	Flow
Reference Action	Add Comment to Record
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Answer Policy Question

Provides employees with personalized, context-aware answers to questions about company policies, benefits, and entitlements through a conversational interface. This action uses profile data, such as role, location, and tenure, to summarize direct answers from policy documents and provide concise responses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	AnswerPolicyQuestion
Reference Action Type	Prompt Template
Reference Action	Answer Policy Question
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Associate Related Records For Incident

Finds similar or related records for an incident and creates associations, such as problems or change requests, to an incident. The action finds other IT records that are either similar or caused by the source incident and creates associations automatically.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	AssociateRelatedRecordsForIncident
Reference Action Type	Standard Action
Reference Action	Associate Related Records For Incident
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Associate Related Records for Problem

Finds similar or related records for a problem and creates associations, such as incidents or change requests, to a problem record. The action finds other IT records that are either similar or caused by the source problem and creates associations automatically.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	AssociateRelatedRecordsForProblem
Reference Action Type	Standard Action
Reference Action	Associate Related Records For Problem
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Check Incident Attributes

The Check Incident Attributes agent action checks and gets important information about an incident, like its status, priority, and assignment. This information is important for managing and solving the

incident.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	CheckIncidentAttributes
Reference Action Type	Prompt Template
Reference Action	Check Incident Attributes
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Check Problem Attributes

Automatically validates attributes such as impact, urgency, category, subcategory for a problem to check whether they're correctly assigned. This action uses historical data and record context to suggest corrections, reducing manual errors and resolution delays.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	CheckProblemAttributes
Reference Action Type	Prompt Template
Reference Action	Check Problem Attributes

Does this action execute one or more prompt templates?	Yes
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Agentforce IT Service | Create Incident Resolution Summary

Creates a resolution summary for an incident based on related and similar records, feed and swarm data, knowledge articles, and activities. The action reduces manual documentation effort, ensures consistency, and creates valuable grounding data for use in future knowledge articles or other agent actions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	CreateIncidentResolutionSummary
Reference Action Type	Prompt Template
Reference Action	Create Incident Resolution Summary
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Create Incident Root Cause Summary

Creates a root cause summary for an incident based on related and similar records, past incidents, configuration items, knowledge articles, and activities. This helps incident managers understand and record the reasons for the issue, serves as grounding data for other agent actions, and helps the team prevent similar issues in the future.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	CreateIncidentRootCauseSummary
Reference Action Type	Flow
Reference Action	Create Incident Root Cause Summary
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Create Problem Resolution Summary

Creates a resolution summary for a problem based on related and similar records, feed and swarm data, knowledge articles, and activities. The action reduces manual documentation effort, ensures consistency, and creates valuable grounding data for use in future knowledge articles or other agent actions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	CreateProblemResolutionSummary
Reference Action Type	Prompt Template
Reference Action	Create Problem Resolution Summary
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Create Problem Root Cause Summary

Creates a root cause summary for a problem based on related and similar records, past problems, configuration items, knowledge articles, and activities. This helps problem managers understand and

record the reasons for the issue, serves as grounding data for other agent actions, and helps the team prevent similar issues in the future.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	CreateProblemRootCauseSummary
Reference Action Type	Prompt Template
Reference Action	Create Problem Root Cause Summary
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Create Service Catalog Request

Initiates and submits hardware service requests through a conversational interface. This action validates required inputs, prompts for missing information, and confirms request details to streamline the procurement process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	CreateServiceCatalogRequest
Reference Action Type	Standard Action

Reference Action	Create Service Catalog Request
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Employee Incident Creation

Creates an incident for employee issues from Agentforce conversations, if they can't resolve the issue with knowledge articles or if no articles exist. This action automatically creates incidents for employee issues and saves their time and effort.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: AI Agent for Employees

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateIncidentForEmployee
Reference Action Type	Standard Action
Reference Action	Create Incident For Employee
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Evaluate Problem Creation Requirement

Evaluates whether a problem must be created or not for an incident based on existing associated problems, similar historical issues, and the incident's severity. This helps to further investigate the issues and reduces manual decision-making.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	EvaluateProblemCreationRequirement
Reference Action Type	Prompt Template
Reference Action	Evaluate Problem Creation Requirement
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Generate Post-incident Review

Generates a post-resolution summary for an Incident record using details such as the category, subcategory, description, related records feed, knowledge, and swarm data into the summary. This action is triggered when an incident fulfills a request for a summary of an Incident in a closed or resolved state.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	GeneratePost-incidentReview
Reference Action Type	Prompt Template
Reference Action	Generate Post-incident Review
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Get Incidents Based on Description

Retrieves a list of records based on the user's description for specific types of tickets such as cases, incidents, or service requests. The action uses AI-powered filtering to get the most relevant list of records.

by understanding the intent of the user input and generates a summary of the relevant records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	GetIncidentsBasedOnDescription
Reference Action Type	Flow
Reference Action	Get Incidents Based on Description
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Get Service Catalog Attributes

Identifies the information required to complete a service request. This action queries the service configuration to prompt users for details, such as model types and business justifications, to ensure all required fields are populated before submission.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	GetServiceCatalogAttributes
Reference Action Type	Standard Action
Reference Action	Get Service Catalog Attributes

Does this action execute one or more prompt templates?	Yes
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Agentforce IT Service | Identify Service Catalog Item

Identifies and selects the correct items from the service catalog by using descriptions. This action searches the catalog based on user input to find matching hardware or services and simplify the request process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	IdentifyServiceCatalogItem
Reference Action Type	Standard Action
Reference Action	Identify Service Catalog Item
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Post Swarming Summary to Feed Item

Posts the swarming summary of a Slack channel as a new feed item to the Chatter feed for a target record such as an incident or a problem. Key information from other channels is documented in the context of a record, becomes easily accessible to stakeholders, and can be used as the grounding data for other agent actions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	PostSwarmingSummaryToFeedItem
Reference Action Type	Flow
Reference Action	Post Swarming Summary To Feed Item
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Propose Resolution Summary for Incident

Proposes a resolution summary for an incident based on related records, feed and swarm data, knowledge articles, and activities. The action helps IT teams to resolve incidents more efficiently by providing a comprehensive and data-driven understanding of the issue.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ProposeResolutionSummaryForIncident
Reference Action Type	Prompt Template
Reference Action	Standard
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Propose Resolution Summary for Problem

Proposes a resolution summary for a problem based on related records, feed and swarm data, knowledge articles, and activities. The action helps IT teams to resolve problems more efficiently by

providing a comprehensive and data-driven understanding of the issue.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed
See Common User Access for Standard Agent Actions .

Action Details

API Name	ProposeResolutionSummaryForProblem
Reference Action Type	Prompt Template
Reference Action	Propose Resolution Summary For Problem
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Reopen a Ticket

Reopens resolved IT tickets through a conversational interface, eliminating manual navigation by enabling users to request status changes through Agentforce.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed
See Common User Access for Standard Agent Actions .

Action Details

API Name	ReopenTicket
Reference Action Type	Flow
Reference Action	Reopen a Ticket
Does this action execute one or more prompt templates?	Yes

templates?	
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Agentforce IT Service | Retrieve Assigned Assets

Identifies and associates hardware with an incident automatically when an employee reports an issue. This action writes a real-time lookup of assigned assets to ensure that tickets include accurate configuration data and accelerate the resolution process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	RetrieveAssignedAssets
Reference Action Type	Flow
Reference Action	Retrieve Assigned Assets
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Summarize Change Request

Generates a summary for a Change Request record with details such as the description, category, and subcategory. It also includes the risk score, risk level, related records, feed, knowledge, and tasks. This action is triggered when a user requests a summary, to understand the risk and impact of deploying a change request.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	SummarizeChangeRequest
Reference Action Type	Prompt Template
Reference Action	Summarize Change Request
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Summarize Incident

Generates a summary for an Incident record with details such as description, category, subcategory, SLA, major incident details, related records, Chatter feed, knowledge, and swarm data. Incident managers or fulfillers can quickly find what they need without parsing the record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
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See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeIncident
Reference Action Type	Prompt Template
Reference Action	Summarize Incident
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Summarize Incident for Employees

Summarizes incidents for employees to help them track the status of the issues they raised. This action improves the employee experience and reduces follow-up calls to the service desk.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: AI Agent for Employees

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeIncidentForEmployee
Reference Action Type	Prompt Template
Reference Action	Summarize Incident For Employee
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Summarize Multiple Incidents

Generates a summary for multiple incidents based on criteria such as the status of incidents, and a specific time period in the past from the current date. Use this action to track common patterns, issues, or trends, and analyze incidents effectively. For example, summarize all open incidents in the last two weeks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeMultipleIncidents
Reference Action Type	Prompt Template
Reference Action	Summarize Multiple Incidents
Does this action execute one or more prompt templates?	Yes

templates?	
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Agentforce IT Service | Summarize Problem

Generates a summary for a Problem record with details such as description, category, subcategory, root cause analysis, related records, Chatter feed, knowledge, and swarm data. Problem managers or fulfillers can quickly find what they need without parsing the record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
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See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeProblem
Reference Action Type	Prompt Template
Reference Action	Summarize Problem
Does this action execute one or more prompt templates?	Yes

Agentforce IT Service | Summarize Release

Summarizes key details of a release record such as description, status, type, and related records, knowledge, and tasks when a user requests an overview.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Agentforce for Service add-on

User Permissions Needed	
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See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeRelease
Reference Action Type	Prompt Template
Reference Action	Summarize Release
Does this action execute one or more prompt templates?	Yes

Agentforce Platform | Answer Questions with Knowledge

Answers a question from a user based on information from relevant knowledge articles and uploaded files.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	AnswerQuestionsWithKnowledge
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes
Required Setup	<p>If you haven't set up and configured Data Cloud, see Data Cloud Features and Learning Path.</p> <p>If you haven't set up a Data Library, see Setting Up Data Libraries.</p>

Answer Questions with Knowledge and Prompt Templates

This action calls the InvocableKnowledgeSearch internal-only invocable action, which uses the Answer

Questions with Knowledge prompt template to provide an answer based off of a user query. See [Answer Questions with Knowledge prompt template](#).

Considerations

- The action respects permissions and sharing settings. When generating responses, the action only uses knowledge articles the requesting user can access.
- The action can use these custom knowledge field types to generate responses: Text, Text Area, Text Area (Long), Text Area (Rich). Text (Encrypted) and URL fields aren't supported.
- The action can use these file upload types to generate responses: text, html, and PDF. You can upload up to 4 MB for text or html files, or 100 MB for PDF files.
- When Agentforce is provisioned in a Salesforce org that has Knowledge, it triggers an initial indexing of knowledge articles. Existing Knowledge-based libraries update if there are changes to knowledge articles, such as the addition of new articles.
- The knowledgeSummary is returned by the LLM. It is based on the instructions in the prompt template, the user query, and retrieved relevant data. The LLM uses these inputs to determine the best pieces of information, or chunks, to use for the response.

See Also

- [Agentforce Data Library](#)
[Agentforce: Agents and Copilot](#)
[Trailhead: Retrieval Augmented Generation: Quick Look](#)

Agentforce Platform | Draft or Revise Email

Creates or revises a draft of an email to a recipient based on the user's request and available email types. Email drafts include a recipient, subject, and email body. Email drafts can be sent through the Salesforce email composer or copied to another email client.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To draft or revise sales emails: Einstein Sales Emails

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	DraftOrReviseEmail
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Reference Action Type	Standard Action
Reference Action	Draft or Revise Email (draftOrReviseEmail)
Does this action execute one or more prompt templates?	Yes

Chain Multiple Actions Together

The Draft or Revise Email action can be combined with other actions. For example, the AI agent can help a user summarize a call and then email it to a prospect. Behind the scenes, the Summarize Record action passes the action's output (a summary) to the Draft or Revise Email action as an input.

The user can combine their requests into a single utterance, or they can make two separate requests.

Examples

- Single Request: “Find the return policy for the Studio Pro headphones and email it to this customer.”
- Single Request: “Summarize the Acme campaign and email it to Sofia Rodriguez.”
- Multiple Requests: “Summarize this case.” And then: “Email the summary to John Smith.”

Best Practices

For optimal results, break up lengthy or complex requests into more specific steps. Also, if the request involves more than one object or the type of object is unclear, include the object name in the utterance.

- Less Effective: “Email the activities of the latest case for Acme to John Smith.”
- More Effective: “Summarize the activities of the latest case for the Acme account, and email it to John Smith.”

Draft or Revise Email and Prompt Templates

This action calls the Draft or Revise Email standard invocable action, which uses internal-only prompt templates to generate and revise email drafts.

Considerations

- If the recipient is a contact or lead, the action assumes the user has the persona of a sales rep. For example, if a service agent uses the action to draft an email to a contact, the generated email could introduce the agent as a salesperson. But if the service agent uses the action to draft an email related to a different object, the email isn't tailored to a particular persona.
- If the email recipient is a contact or lead, the action can generate a sales introduction email, as well as other types of sales emails, such as a follow-up or check-in. The agent analyzes the user's request to

- determine whether the draft is created as an introductory email or other type of email.
- The email's tone is set by default. For introduction emails, the conversational style is professional and neutral. For other types of sales emails, the conversational style is professional and friendly.
 - The Draft or Revise Email action relies on the [Send Email global action](#). Changing the API name of the Send Email global action can cause the Draft or Revise Sales Email action to fail.
 - A user can't send an email directly from the Agentforce panel. They can open the draft in the Salesforce email composer or select **Copy** to paste it into a client of their choosing.
 - Users can't add a link or attach a file to an email draft directly from the Agentforce panel, but they can make these changes in an email composer.
 - The Draft or Revise Email action works best when users specify complete requests, including:
 - The recipient of the email (required).
 - Whether the email is intended for a recipient the user is engaging for the first time.
 - Specific information to include in the draft, such as an invitation to an upcoming conference or a reference to an earlier conversation.
 - When revising, specific elements of the email to change, such as style, tone, or length. If the changes are significant, it can be easier to start over with a new draft.
- For example: "Shoot an email to Luca Donovan to schedule a meeting to check on progress, review the latest features, and introduce Jaxon Reyes as their account representative. Offer multiple time options for them to choose from."
- If a user's request doesn't contain all required inputs or a required input isn't valid, the AI agent can't execute the action and generates an error message. The user must make a new request.
 - If users specify more than one record in their request, the action can fail. For example, if a user requests an email to a contact and also mentions the name of an opportunity, the agent can return an error. It's a best practice for users to mention only the record name of the recipient.
 - If PII masking is turned on, the generated email can sometimes contain placeholders for the Salesforce data. Users can replace the placeholders with the relevant information before sending the email.
 - Supports drafting for multiple recipients (up to 10).
 - CC and BCC fields aren't supported.
 - A limit of 10 recipients is enforced to help prevent triggering spam filters.

Agentforce Platform | Extract Fields and Values from User Input

Extracts fields and their corresponding values from a record based on the user's request. The output of this action is used as the input for the Update Record action. For example, when a user wants to edit a field on a record, the Extract Fields and Values from User Input action is triggered first to retrieve the field and its value, and then the Update Record action saves the updated extracted value to the record.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ExtractFieldsAndValuesFromUserInput
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes

Considerations

- Only existing records that are searchable and User Interface API enabled can be updated by this action.
- This action only supports objects with layouts.
- The action only returns fields from the record's page layout that can be updated or created. Read-only fields are filtered out even if requested by the user.
- Users must have permission to view and edit the record and fields they want to update. Users can update one record at a time.
- This action doesn't support record creation. For example, users can't ask the AI agent to log a call because that requires creating a record.
- This action only supports the editing of records by updating record fields and their corresponding values. Other types of record changes—such as cloning, merging, associating a related record, transferring account ownership, or submitting a quote—are not supported.
- This action can't create a new field on an object's layout. For example, if a user enters, "Update the service start date to 12/10/2024," the request will fail if the Service Start Date field doesn't already exist.
- If a user wants to edit a multi-select picklist, only one value is supported per update.
- In percent fields, there's no calculation of a percentage. The action assumes that the value the user entered is already a percentage value.
- Conversion calculations in currency fields aren't supported. For example, if a field stores an amount in dollars and the user asks to update the amount to 500 euros, the value will be saved as 500 dollars.
- In numeric fields, only the shorthand notation for thousands (K), millions (M), and billions (B) is supported. For example, "2K" will be interpreted as "2000." However, the values of numeric fields can't be converted. For example, if a field is named Number of Years and the user tries to update the value to "36 months," the value will be changed to "36 years" rather than "3 years."
- Updates from a related record aren't supported for many-to-many relationships. For example, users can't make a request such as: "Remove the contact John Smith from the Acme opportunity."
- Users can't append a value to an existing value in a field. The value the user provides overwrites any existing value.

See Also

[User Interface API Developer Guide: All Supported Objects](#)
[Agentforce Platform | Update Record](#)

Agentforce Platform | Get Record Details

Retrieves the details of a record, including object fields and values, records from related lists, and associated tasks and events.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetRecordDetails
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Considerations

- This agent action has the same considerations as the [Record Snapshot](#) data resource in Prompt Builder.

Agentforce Platform | Identify Object by Name

Interprets the user's input to determine which object the user is referring to and then returns a list of matching object names so other actions can be taken. For example, if the user enters, "List the opportunities for the Acme account" in the Agentforce panel, the action identifies that the user is requesting information related to the Account object and Opportunity object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations, or

Agentforce 1 or Einstein 1 Editions**USER PERMISSIONS NEEDED**

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	IdentifyObjectName
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Considerations

- This action works with any searchable standard objects supported by the User Interface API and any searchable custom objects. External objects are not supported.
- Renamed objects are supported (for example, if Account is renamed to Hospital).
- Multiple objects can be identified in a single query.
- Object synonyms are supported for common standard objects. For example, if a user's request includes the word "deal," the action can determine that the user is referring to an opportunity. Customization of synonyms isn't supported.

See Also

[User Interface API Developer Guide: All Supported Objects](#)

Agentforce Platform | Identify Record by Name

Searches for Salesforce records by name and returns a list of matching record IDs. For example, if a user enters, "Show me the Acme records" in a Salesforce org with multiple records related to "Acme," the action can return the Acme account, the Acme - 20k opportunity, and the Acme - 50k opportunity.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	IdentifyRecordByName
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Considerations

- This action works with any searchable standard objects supported by the User Interface API and any searchable custom objects. External objects are not supported.
- The maximum number of results returned is five. Three records are returned from the most relevant queried object. If other relevant objects exist, one record is returned for each of the next two relevant objects.

See Also

[User Interface API Developer Guide: All Supported Objects](#)

Agentforce Platform | Query Records

Finds and retrieves Salesforce records based on the user's request and specific conditions, such as the values of fields.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	QueryRecords
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Considerations

For overall considerations for Agentforce, see [Agentforce Considerations](#)

- This action supports only English language.
- This action works with any searchable and queryable standard objects supported by the User Interface API and any searchable custom objects. External objects are not supported.
- Queries with data from multiple objects aren't supported. For example, a user can't view their leads and opportunities with one request.
- This action can filter search results by querying up to one parent-to-child or child-to-parent relationship. For example, a user can ask: "What's the average amount of closed opportunities that have an account based in the United States?"
- Queries that retrieve data based on a lookup field, related list, or a picklist don't always work.
- The maximum number of results displayed is 50, even if more than 50 matching results are found.
- Field normalization isn't available, so retrieving records based on field values is format-dependent. For example, the user request "Get my contact with phone number 415-123-4567" returns results only if the phone number is entered in the exact same format.
- Queries with ambiguous filter or sort criteria are determined by the LLM. No specific business rules are used. For example, if a user requests their "top" opportunity, the LLM can interpret "top" to mean the opportunity with the highest amount or soonest close date. If you have questions about the criteria used to retrieve the search results, view the plan in Agentforce Builder.
- Synonyms are supported for common standard objects and fields. For example, if a user's request includes the word "deal," the action can determine that the user is referring to an opportunity. Customization of synonyms isn't supported. Synonyms for custom objects or fields aren't always interpreted accurately.
- A limited set of default standard fields for the Account, Contact, Case, Opportunity, and Lead objects are supported. Other fields are supported only if they're included in the queried object's default searchable layout and the default record page layout. If the object has a large number of fields, the action can limit the number of fields included in the search.
- When results are returned, a maximum of 10 fields are dynamically chosen based on a combination of the search layout and query criteria. For example, if a user wants to see their opportunities sorted by rating and the Rating field isn't part of the search layout, the action returns the Rating field along with nine fields from the search layout for a total of ten fields.
- Results are returned only when the full search criteria are met. Partial results aren't supported. If a user requests information based on two fields but they only have access to one of those fields, the query returns an error instead of returning results based on just one of the fields.
- Implicit field lookups aren't fully supported. To retrieve records with a specific field match, mention the precise field and value in the query. For example, for more accurate results, a user can enter, "List my accounts that have an Industry of Technology" rather than "List my technology accounts."

See Also

- [User Interface API Developer Guide: All Supported Objects](#)
- [The 360 Blog: 9 Steps to Mitigate Agent Misunderstandings](#)

Agentforce Platform | Query Records with Aggregate

Answers aggregation questions about Salesforce data, such as count, sum, average, max, min, and group-by.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	QueryRecordsWithAggregate
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Considerations

- This action supports only English language.
- This action works with any searchable standard objects supported by the User Interface API and any searchable custom objects. External objects are not supported.
- Aggregated queries on related objects aren't supported. For example, a user can't find out how many accounts have multiple contacts.
- Queries with data from multiple objects aren't supported. For example, a user can't view their leads and opportunities with one request.
- Queries that retrieve data based on a lookup field, related list, or a picklist don't always work.
- Field normalization isn't available, so retrieving records based on field values is format-dependent. For example, the user request "Get my contacts with phone number 415-123-4567" returns results only if the phone number is entered in the exact same format.
- Queries with ambiguous filter or sort criteria are determined by the LLM. No specific business rules are used. For example, if a user wants to get a count of their "top" opportunities, the LLM can interpret "top" to mean the opportunities with the highest amount or soonest close date. If you have questions about the criteria used to retrieve the search results, view the plan in Agentforce Builder.
- Synonyms are supported for common standard objects and fields. For example, if a user's request includes the word "deal," the action can determine that the user is referring to an opportunity. Customization of synonyms isn't supported. Synonyms for custom objects or fields aren't always

interpreted accurately.

- A limited set of default standard fields for the Account, Contact, Case, Opportunity, and Lead objects are supported. Other fields are supported only if they're included in the queried object's default searchable layout and the default record page layout. If the object has a large number of fields, the action can limit the number of fields included in the search.
- When results are returned, a maximum of 10 fields are dynamically chosen based on a combination of the search layout and query criteria. For example, if a user wants to see their opportunities sorted by rating and the Rating field isn't part of the search layout, the action returns the Rating field along with 9 fields from the search layout for a total of 10 fields.
- Results are returned only when the full search criteria are met. Partial results aren't supported. If a user requests information based on two fields but they only have access to one of those fields, the query returns an error instead of returning results based on just one of the fields.
- If a query aggregates a large number of records, the action can time out or fail to process. For example, a request to find the sum of all open opportunities can fail if your organization has thousands of opportunity records. Users can provide more specific criteria to limit the search.
- Implicit field lookups aren't fully supported. To retrieve records with a specific field match, mention the precise field and value in the query. For example, for more accurate results, a user can enter, "How many accounts have an Industry of Technology?" rather than "How many technology accounts do I have?"

See Also

[User Interface API Developer Guide: All Supported Objects](#)

[The 360 Blog: 9 Steps to Mitigate Agent Misunderstandings](#)

Agentforce Platform | Search the Web

Retrieves real-time or external information that isn't available in Salesforce CRM. Use it for questions about news, market trends, competitor details, and product comparisons, or when Salesforce answers need added context from the web.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	WebSearch
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Reference Action Type	Standard Action
Reference Action	Search the Web (webSearchStream)
Does this action execute one or more prompt templates?	Yes

Search The Web and Prompt Templates

This action is a standard invocable action that uses internal-only prompt templates to generate the final web search summary.

If admins want to change the output format (for example, bullet points instead of paragraphs), they can't edit the internal prompt template directly. Instead, admins must either create a new version of the out-of-the-box General Web Search topic with updated instructions or add new instructions to another topic where the action is used.

Guidelines and Considerations

- Results are generated from external sources and displayed with citations.
- Performance may vary depending on the search provider.
- When adding the Search the Web action to an existing topic, admins must fine-tune the instructions so the agent uses the correct prompt to initiate conversations.

Set the Search Provider for Search The Web Action

To improve the accuracy of web search responses, set the search provider for Search The Web action. The provider value determines whether each request is routed to OpenAI (Beta) or BrightData, based on the name entered in the configuration input. The input accepts uppercase or lowercase text and ignores extra spaces.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To build and manage Employee agents:

Manage AI Agents

USER PERMISSIONS NEEDED

OR

Customize Application

Before you begin, your admin must turn on the settings required for OpenAI as the search provider. This includes turning on Einstein, Beta Generative AI Models, and OpenAI Models in Einstein Setup. The Beta Generative AI Models option appears only when Data Cloud is enabled.

1. From Setup, in the Quick Find box, enter *Agents*, and then select **Agentforce Agents**.
2. Select your agent, and click **Open in Builder**.
3. In Agentforce Builder, open the **General Web Search** topic.
4. Select **This Topic's Actions**.
5. Select **Search The Web**.
6. Click **Edit Action**.
7. In **Search Provider**, locate the Configuration Input field and enter OpenAI or BrightData.
If no value is entered, BrightData is used as the default provider.
8. Save the action.

Customize Allowed Domains for the Search The Web Agent Action

Limit web search results to specified websites by defining allowed domains for the Search The Web agent action in the Agentforce Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To build and manage Employee agents:

Manage AI Agents

OR

Customize Application

1. From Setup, in the Quick Find box, enter *Agents*, and then select **Agentforce Agents**.
2. Select your agent, and click **Open in Builder**.
3. In Agentforce Builder, open the **General Web Search** topic.
4. Select **This Topic's Actions**.
5. Select **Search The Web**.

6. Click **Edit Action**.
7. In the Inputs section, navigate to the **Allowed Domains** and enter up to 10 comma-separated domains.
8. Save the action.

See Also

[Considerations for Allowed Domains in the Search The Web Agent Action](#)

Considerations for Allowed Domains in the Search The Web Agent Action

Review important considerations when configuring allowed domains for the Search The Web agent action.

- You can specify up to 10 domains per Search the Web action.
- Enter domains as a comma-separated list, without http://, https://, or www. The action also accepts domains with these prefixes, but they are not required.
- Subdomains or full URLs are accepted, but only the base domain is used.
- If domains are specified, search results are limited to the configured domains, regardless of the selected search provider.
- If some domains are invalid, results are returned only from the valid domains. If none of the domains are valid or reachable, the action returns no results.
- Allowed domains apply only to the Search the Web action and do not affect Trusted URLs defined in Salesforce Setup.

Agentforce Platform | Send Email with Verification Code

Send a verification code to the customer's email to verify their identity. The action requires the customer's username or email as input. If the provided email is valid, a verification code is sent to the customer.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SendAuthenticationEmail
----------	-------------------------

Reference Action Type	Flow
Reference Action	Send Verification Code
Does this action execute one or more prompt templates?	No

Considerations and Guidelines

If the verification code isn't received, confirm that the email address or username is correct and retry the process. The one-time passcode (OTP) remains valid for 5 minutes. If the code isn't received within this period, initiate a new request.

To use this action with the [Verify Customer](#) action, map the outputs of the Send Email with Verification Code action to variables. Then assign the variables to the corresponding Verify Customer action inputs. Learn more in [Control Access to Topics and Actions with the Customer Verification Topic](#).

Agentforce Platform | Summarize Record

Generates a summary of a record. The output depends on the record type and the prompt templates the user has access to.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeRecord
Reference Action Type	Standard Action
Reference Action	Summarize Record (summarizeRecord)
Does this action execute one or more prompt templates?	Yes

Summarize Record and Prompt Templates

This agent action calls the Summarize Record standard invocable action, which uses prompt templates of type Record Summary to generate record summaries. The specific prompt template executed varies based on the object type of the record to be summarized and the prompt templates the user has access to.

The Summarize Record standard invocable action identifies active prompt templates of type Record Summary and filters out prompt templates that aren't included in the user's licenses and permissions.

If a template matches the object type of the record to be summarized, the template is executed.

Salesforce provides default templates for certain objects, such as accounts. These templates generate an enhanced, object-specific summary instead of a generic summary. If multiple matching templates exist, custom (database) templates are prioritized over Salesforce-provided (file-based) templates.

If no matching templates are found, the Summarize Record standard invocable action dynamically identifies key record fields and related data and then generates a prompt that summarizes the record. This generic summary can be used to create record summaries for custom and standard objects. It uses standard and custom fields to generate the summary.

-  **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 the Agentforce Employee Agent through the Summarize Record action, with the Sales Summaries User permission set.

Considerations

- Only records that are searchable and User Interface API-enabled can be summarized. Data Cloud and other data sources aren't supported.
- Users can summarize one record, not multiple records.
- Users can't filter summaries based on specific criteria. For example, users can't summarize only the activities for an opportunity or only the case history for an account.
- Users can't refine a previously generated summary.
- The summary doesn't include news related to the account or company.
- You can clone the Salesforce-provided prompt templates in Prompt Builder and customize the default templates so they're tailored to your organization's needs.

Best Practices for Structuring Prompts in Summarize Record Actions

Prompts set expectations for how a large language model (LLM) summarizes data in a record. Review best practices for structuring Summarize Record prompts to guide the model with the right context, format, and tone so that your summaries are clear, consistent, and useful across summarization, analysis, classification, or insight generation use cases.

- Define the model's role with a clear persona: Start your prompt by assigning the model a relevant role

- or perspective (for example, “You are a Salesforce CRM analyst”). This helps the model understand the context and respond accordingly.
- Separate instructions from data: Structure the prompt into two distinct sections, one for instructions and one for the record data. Use clear tags like ### Instructions and ### Data to avoid confusion and help the model focus on the right parts.
 - Be specific about what the model should focus on: Clearly indicate the fields, themes, or patterns you want the model to identify such as deal value, stage, key stakeholders, blockers, or next steps. Vague prompts can lead to incomplete or overly generic responses.
 - Include formatting and tone guidance: Mention how the output should be structured—as bullet points, numbered lists, or in a specific tone. Consistent formatting helps maintain readability across outputs.
 - Add a sample output: If possible, include a short example summary in the prompt to demonstrate the desired tone, structure, and level of detail. This helps guide the model’s response more effectively.
 - Keep it concise: Avoid long or overly complex prompts. Large prompts and responses may hit token limits, which can cause incomplete outputs or latency. Focus on clarity and brevity.

The following example shows how to apply the best practices in a complete, well-structured prompt for the Summarize Record action.

Let’s assume you’re an experienced Salesforce CRM analyst who specializes in analyzing sales opportunities and creating concise summaries.

Example

```
-----instructions-----  
Please analyze this Salesforce opportunity record and create a summary focusing on key deal details.
```

Focus on:

- Amount
- Stage
- Account Name
- Close Date
- Next Step
- Key Stakeholders

Format the output as follows:

- Start with a one-line executive summary
- Use bullet points for deal details
- Bold the deal value and stage
- Include a 'Next Steps' section at the bottom

Example output:

```
ACME Corp Deal - $500K opportunity in Negotiation stage, led by John Smith.
```

- Deal Value: \$500,000
 - Current Stage: **Negotiation**
 - Key Contact: John Smith (Decision Maker)
- Next Steps: Contract review scheduled for 5/15

Keep the full summary to 3-4 sentences total.

-----data-----

```
{  
    "accountName": "ACME Corp",  
    "opportunityName": "Q3 Expansion Opportunity",  
    "amount": 500000,  
    "stage": "Negotiation/Review",  
    "closeDate": "2024-05-15",  
    "nextStep": "Contract Review",  
    "keyStakeholders": [  
        {  
            "name": "John Smith",  
            "role": "Decision Maker"  
        },  
        {  
            "name": "Priya Das",  
            "role": "Legal"  
        }  
    ]  
}
```

See Also

[Prompt Template Types](#)

[User Interface API Developer Guide: All Supported Objects](#)

Agentforce Platform | Speech To Text

Converts an audio file into text and returns the transcript for use in agent conversations or downstream actions.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SpeechToText
Reference Action Type	Standard Action
Reference Action	Speech To Text
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- This action consumes Flex Credits under the Speech To Text usage type.
- The action returns a transcript only and doesn't store it automatically. To save it, use Flow elements such as Update Records or Create Records, or Apex logic to write the output to a Salesforce record.
- The action supports multiple languages and common audio formats, including MP3, MP4, and WAV, with a maximum file size of 5 MB.
- The action transcribes audio in the primary detected language, and mixed-language audio may work. If you plan to use the transcript in Agentforce downstream features, verify that the detected language is supported. See [Generative AI Supported Languages](#).
- This action does not perform translation.

For detailed usage guidelines and limitations, see [Considerations and Limitations for Speech To Text in Agentforce](#).

Considerations and Limitations for Speech To Text in Agentforce

Before using the Speech To Text action, review the following considerations and limitations.

View supported editions .	
 This article applies to:	Agentforce Employee Agent, Agentforce Builder, Flow, REST API, Apex
 This article doesn't apply to:	Legacy Chat, Standard Messaging Channels

General Considerations

- The Speech-to-Text action converts supported audio files into text and returns the transcript as output.
- This action can be added to any topic and any agent.
- The action is exposed through the invocable actions API and is available through agent actions, REST, Flow, and Apex.
- Processing time may vary based on audio length, file size, audio quality, and content complexity.
- Audio in unsupported or mixed languages might not be fully recognized.
- The action can be used in Flow and automation scenarios.
- The action is subject to invocation limits based on available memory in your organization. Requests that exceed the limit may fail.
- Performance may vary based on audio length, file size, audio quality, and content complexity.
- Error handling can be managed using Flow fault paths.
- Files larger than 5 MB are not supported.
- Translation is not supported.
- Real-time microphone capture is not supported.
- Speaker identification, timestamps, and confidence scores are not available.
- When adding the Speech To Text action to a topic, ensure that the topic instructions prompt for either a valid audio file ID or a file name. If a file name is provided, the topic must include the IdentifyRecordByName action to resolve the file name to an audio file ID before invoking Speech To Text action.

Supported Audio Formats and File Limits

Item	Supported Value
File Formats	MP3, MP4, WAV
Maximum File Size	5 MB
Input Type	Audio File ID
Output	Transcribed Text

Language Support

- The action automatically detects the language of the audio.
- Language detection of the audio is automatic and can't be configured.
- Mixed-language or unsupported-language audio may work, but transcription accuracy may vary.
- Transcription quality may vary depending on the detected language. If you plan to use the transcript in Agentforce downstream features, verify that the detected language is supported. See [Generative AI Supported Languages](#).
- This action transcribes audio to text only and doesn't perform translation. If the transcript will be used in Agentforce conversations or actions, verify that the transcript language is supported. See [Generative AI Supported Languages](#).

Usage Types for Speech To Text

Digital Wallet Card	usage type	Description	notes
Flex Credits	Speech To Text	Speech To Text converts audio input into text using Automatic Speech Recognition (ASR) models. Flex credit usage is metered based on the duration of audio processed, measured in seconds.	Refer to Flex Credits Billable Usage Types

Error Handling

If the Speech To Text action can't process a request, it returns an error code and a message.

Error code	Description	Recommended action
REQUIRED_FIELD_MISSING	A required parameter is missing.	Specify a value for the required parameter and try again.
INVALID_INPUT	The request contains invalid input.	Verify that the input values, including the audio file ID and format, are valid and try again.
LIMIT_EXCEEDED	The audio file exceeds the supported size or the request limit was exceeded.	Use a smaller audio file or retry the request later.
RECORD_NOT_FOUND	No audio file was found for the provided ContentDocument ID.	Verify that the ContentDocument ID is correct and accessible.
INSUFFICIENT_ACCESS_OR_READONLY	Access to the feature or audio file isn't available.	Contact your Salesforce admin to get the required access.
UNKNOWN_EXCEPTION	The audio file couldn't be transcribed or an unexpected error occurred.	Retry the action. If the issue persists, contact your Salesforce admin.
INVALID_INPUT_FORMAT	The audio file format isn't supported.	Use a supported audio format such as MP3, MP4, or WAV.

Use these errors to configure fault handling in Flow or error handling in Apex.

Agentforce Platform | Update Record

Updates one or more fields on a record. To retrieve the fields and values the user wants to change, the Extract Fields and Values from User Input action must be triggered before the Update Record action.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	UpdateRecordFields
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Considerations

- Only existing records that are searchable and User Interface API enabled can be updated by this action.
- This action only supports objects with layouts.
- The action only returns fields from the record's page layout that can be updated or created. Read-only fields are filtered out even if requested by the user.
- Users must have permission to view and edit the record and fields they want to update. Users can update one record at a time.
- This action doesn't support record creation. For example, users can't ask the AI agent to log a call because that requires creating a record.
- This action only supports the editing of records by updating record fields and their corresponding values. Other types of record changes—such as cloning, merging, associating a related record, transferring account ownership, or submitting a quote—are not supported.
- This action can't create a new field on an object's layout. For example, if a user enters, "Update the service start date to 12/10/2024," the request will fail if the Service Start Date field doesn't already exist.
- If a user wants to edit a multi-select picklist, only one value is supported per update.
- In percent fields, there's no calculation of a percentage. The action assumes that the value the user entered is already a percentage value.

- Conversion calculations in currency fields aren't supported. For example, if a field stores an amount in dollars and the user asks to update the amount to 500 euros, the value will be saved as 500 dollars.
- In numeric fields, only the shorthand notation for thousands (K), millions (M), and billions (B) is supported. For example, "2K" will be interpreted as "2000." However, the values of numeric fields can't be converted. For example, if a field is named Number of Years and the user tries to update the value to "36 months," the value will be changed to "36 years" rather than "3 years."
- Updates from a related record aren't supported for many-to-many relationships. For example, users can't make a request such as: "Remove the contact John Smith from the Acme opportunity."
- Users can't append a value to an existing value in a field. The value the user provides overwrites any existing value.
- When this action runs in Lightning Experience, it shows three standard buttons: Confirm, Edit Full Record, and Cancel. These buttons appear by default and can't be configured.
 - Confirm applies the updates to the record.
 - Edit Full Record opens the standard record form in Lightning Experience, allowing users to manually edit field values before saving. In Agentforce Builder, the button appears in the preview conversation, but clicking it doesn't open the form or update any values. Changes made in the builder aren't saved.
 - Cancel discards the update request and leaves the record unchanged.

See Also

[User Interface API Developer Guide: All Supported Objects](#)

[Agentforce Platform | Extract Fields and Values from User Input](#)

Agentforce Platform | Verify Customer

Verifies the customer's identity based on the one-time passcode (OTP) generated and emailed by the Send Email with Verification Code action. If the user verification is successful, it outputs the verified user or contact ID, which can be used in filters and as input to other actions. If the verification is unsuccessful, it prompts the user to retry.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	VerifyCustomer
----------	----------------

Reference Action Type	Flow
Reference Action	Verify Customer
Does this action execute one or more prompt templates?	No

Considerations and Guidelines

During the verification process, the user must enter the correct OTP to continue. After 3 unsuccessful attempts, the process restarts, requiring the user to reenter their username or email address to receive a new verification code. This security measure prevents bypassing the verification process after multiple unsuccessful attempts.

To use this action with the [Send Email with Verification Code](#) action, map the outputs of the Send Email with Verification Code action to variables. Then assign the variables to the corresponding Send Email with Verification Code action inputs. Learn more in [Control Access to Topics and Actions with the Customer Verification Topic](#).

Asset Service Management | Create Service Quote

Creates a quote for specified products.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateSvcQuote
Reference Action Type	Flow

Does this action execute one or more prompt templates?	No
--	----

Asset Service Management | Create Service Work Order

Creates a work order from a quote for specified products.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateServiceWorkOrder
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Asset Service Management | Get Asset Warranties

Gets the active asset warranties associated with an asset.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAssetWarranties
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Asset Service Management | Get Price Books

Gets the price books for all specified products.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetPriceBooks
Reference Action Type	Flow

Does this action execute one or more prompt templates?	No
--	----

Asset Service Management | Get Products

Gets the products associated with a specific work type.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetProducts
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Asset Service Management | Get Service Quote

Gets the approved quotes associated with an asset ID.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetServiceQuote
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Asset Service Management | Summarize Asset Performance

Summarizes the performance, service condition, and telematics data of an asset.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeAssetPerformance
Reference Action Type	Prompt Template

Does this action execute one or more prompt templates?	Yes
--	-----

Asset Service Management | Summarize Vehicle Performance

Summarizes the performance, service condition, and telematics data of a vehicle.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeVehiclePerformance
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Automotive | Create Opportunity and Opportunity Product

Creates an opportunity and an associated opportunity product for a customer.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateOppAndOppProduct
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Automotive | Create Vehicle Appraisal

Creates appraisal and appraisal item records for a vehicle.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateVehicleAppraisal
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Automotive | Create Payment Deferral Case

Creates a case for a payment deferral request.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreaPymtDeferralCase
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Automotive | Create Payment Due Date Modification Case

Creates a payment due date modification case for a financial product.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreaPymtDueDtModCase
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Automotive | Get Automotive Financial Accounts for Service Processes

Gets the financial accounts, such as an automotive loan or lease, or any other financial product, for which a service process is requested, based on account and vehicle information.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAutoFinclAcctSvcProc
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Automotive | Get Available Appointment Slots

Gets the available time slots for booking appointments for a specified product.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	getAvailableAppointmentSlots
Reference Action Type	Invocable Action
Does this action execute one or more prompt templates?	No

Automotive | Get Dealers for Search Criteria

Gets the dealer records corresponding to a user specified search criteria for vehicle sales or service.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetDealersForSrchCriteria
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Automotive | Get Financial Accounts for a Customer

Gets a list of financial accounts associated with an account.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetFinclAccountsForACust
----------	--------------------------

Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Automotive | Get Updated Terms for Payment Deferral

Sends a request to check the eligibility of a payment deferral request for a loan, a lease, or any other financial product to an external service, and returns the updated payment terms.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetUpdtTermsForPaymentDeferral
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Automotive | Get Updated Terms for Payment Due Date Modification

Sends the request to check the eligibility of a payment due date modification request for a loan, a lease, or any other financial product to an external service, and returns the updated payment terms.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetUpdtTermsForPymtDueDateMod
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Automotive | Get Vehicles for a Customer

Gets a list of vehicles associated with an account.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetVehiclesForACustomer
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Automotive | Schedule Automotive Appointment

Schedules a test drive or service appointment by identifying the dealer territories and technicians to perform the service.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ScheduleAutomotiveAppointment
Reference Action Type	Invocable Action
Does this action execute one or more prompt templates?	No

Automotive | Search Vehicle Definitions

Gets the vehicle definition searchable fields corresponding to a user specified search criteria for vehicle sales.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SearchVehicleDefinitions
Reference Action Type	Flow
Does this action execute one or more prompt templates?	Yes

Search Vehicle Definitions and Prompt Templates

This action calls the Get Search Criteria prompt flow, which uses internal-only prompt templates to fetch vehicle definition searchable field records.

Automotive | Summarize Customer Account

Summarizes an account for automotive industry use cases, with details such as the account's assets, vehicles, driver performance, households, engagements, and interests.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeCustomerAccount
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Automotive | Summarize Customer Finance Profile

Summarizes the financial information of an account, with details such as the account's financial accounts, application forms, cases, and opportunities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeCustomerFinanceProfile
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Automotive | Summarize Financial Account for Customer

Summarizes the financial account for automotive industry use cases, with details such as the financial account's parties, statements, fees, balances, transactions, and vehicles.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeFinancialAccountForCustomer
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

B2B Commerce | Add Order to Cart

Creates a new order with the same items as a previous order. The new order is based on the previous order reference number. This action also provides a link for the user to complete the purchase.

REQUIRED EDITIONS

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with B2B Commerce

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	AddOrderToCart
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Guided Shopping for B2B and D2C Commerce

B2B Commerce | Create Promotions

Creates a promotion record based on the store ID.

REQUIRED EDITIONS

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with B2B Commerce

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreatePromotions
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising for Commerce

See Also

[Merchant Agent for Commerce](#)

[Agentforce for Commerce](#)

B2B Commerce | Format Commerce Insights

Displays the insights result header in rich text.

REQUIRED EDITIONS

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with B2B Commerce

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FormatCommerceInsights
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising for Commerce

See Also

[Merchant Agent for Commerce](#)

[Agentforce for Commerce](#)

B2B Commerce | Get Commerce Business Objectives

Retrieves key performance indicators (KPIs), such as average order value (AOV) and site conversion rate for a store.

REQUIRED EDITIONS

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with B2B Commerce

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCommerceBusinessObjectives
Reference Action Type	Standard Action

Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising for Commerce

See Also

[Merchant Agent for Commerce](#)
[Agentforce for Commerce](#)

B2B Commerce | Get Commerce Promotion Templates

Gets a list of suggested promotion templates based on the store ID.

REQUIRED EDITIONS

Available in: **Enterprise, Unlimited, and Developer** Editions with B2B Commerce

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCommercePromotionTemplates
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising for Commerce

See Also

[Merchant Agent for Commerce](#)
[Agentforce for Commerce](#)

B2B Commerce | Get Most Recent Orders

Retrieves the shopper's most recent orders.

REQUIRED EDITIONS

Available in: **Enterprise, Unlimited, and Developer** Enterprise Editions with B2B Commerce

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetMostRecentOrders
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Guided Shopping for B2B and D2C Commerce

B2B Commerce | Get Shopper Effective Accounts in Commerce

Retrieves effective accounts associated with the provided user ID and web store ID from Salesforce CRM.

REQUIRED EDITIONS

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with B2B Commerce

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetShopperEffectiveAccounts
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Guided Shopping for B2B and D2C Commerce

B2B Commerce | Look Up Order Summary for Commerce

Gets an order summary with the provided order reference number.

REQUIRED EDITIONS

Available in: **Enterprise, Unlimited, and Developer** Editions with B2B Commerce

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	LookUpOrderSummary
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Guided Shopping for B2B and D2C Commerce

B2C Commerce | Add Item To Cart

Adds items to the cart.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	AddItemToCart
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Assign Context Variables to Agent Conversations Create Context Variables for Messaging Sessions .

Guidelines and Considerations

- For information about configuring express payment options related to cart management, see [Set Up Apple Pay and Google Pay for PWA Kit Storefronts](#).
- To include express checkout buttons on your product detail pages, use 'v2' as the input **apiVersion** parameter.

B2C Commerce | Answer Product FAQs

Answers frequently-asked questions about B2C Commerce store products to help customers make informed buying decisions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	AnswerProductFAQs
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Prepare Product FAQ and Site FAQ Topics

B2C Commerce | Answer Site FAQs

Answers frequently-asked questions about your B2C Commerce storefront. This action generates answers from files about your site, stored in the Agentforce Data Library.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	AnswerSiteFAQs
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Prepare Product FAQ and Site FAQ Topics

B2C Commerce | Apply Coupon to B2C Commerce Cart

Help shoppers manually apply coupons to the cart and clearly display complex discounts in the cart summary and order confirmation pages.

REQUIRED EDITIONS

Available in: Developer, Unlimited, and Enterprise Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ApplyCouponToBasket
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Configure Your Agent to Apply Coupon to B2C Cart

B2C Commerce | Get B2C Commerce Conversational Context Questions

Generates questions that help shoppers get product recommendations faster.

REQUIRED EDITIONS

Available in: Developer, Unlimited, and Enterprise Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetB2CCConvContextQuestionAction
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Configure Your Agent to Use Conversational Context

B2C Commerce | B2C Commerce Product Search

Provides category recommendations, product recommendations, or query reformulations if the customer's request shows an intent to buy, explore, or learn about products that are sold in the store.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	B2CCommerceProductSearch
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Guided Shopping for B2C Commerce

Guidelines and Considerations

To ensure consistent performance and reliability, don't change the default settings or instructions for this action.

B2C Commerce | Get B2C Order Confirmation Details

Retrieves order confirmation information based on the order ID. Use this action to view order confirmations after a successful payment for a new order. It's invoked automatically. Don't use it to search for a shopper's order.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetB2COrderConfirmationDetails
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Guided Shopping for B2C Commerce

B2C Commerce | Get B2C Product By ID

Retrieves product information based on a Product ID. Information retrieved includes basic product details, along with related information such as product variations, and product bundles.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetB2CProductById
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Guided Shopping for B2C Commerce

B2C Commerce | Get B2C Product Details

Provides details about a product in B2C Commerce storefront.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetB2CProductDetails
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Guided Shopping Agent for B2C Storefronts

B2C Commerce | Get B2C Product Recommendations

Recommends products that the customer might want to purchase.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetB2CProductRecommendations
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Guided Shopping for B2C Commerce

B2C Commerce | Get B2C User Access Token

Gets an access token for a guest user.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetB2CUserAccessToken
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Guided Shopping for B2C Commerce

B2C Commerce | Search for B2C Order

Searches for order details based on an order number and an email address provided by the user.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SearchForB2COrder
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Guided Shopping for B2C Commerce

B2C Commerce | Edit Cart

Edits items in the customer's cart.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	EditCart
Reference Action Type	Standard

Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Guided Shopping for B2C Commerce

B2C Commerce | View Cart

Shows items in the customer's cart.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with B2C Commerce.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ViewCart
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Guided Shopping for B2C Commerce

Guidelines and Considerations

- For information about configuring express payment options related to cart management, see [Set Up Apple Pay and Google Pay for PWA Kit Storefronts](#)
- To include express checkout buttons on your product detail pages, use 'v2' as the input **apiVersion** parameter.

Channel Revenue Management | Get Aggregate Sources for a Member

Fetches rebate aggregate sources for a member in a specified payout period.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAggregateSourcesForMember
Action Type	Standard
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Channel Revenue Management | Get Aggregate Summary

Retrieves a rebate member product aggregate summary with status, quantities, rebate, and payout details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAggregateSummary
Action Type	Standard
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Channel Revenue Management | Get Payout Periods For a Member

Fetches all payout periods for a specific Rebate Program Member, and returns a list of records as list.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetPayoutPeriodsForMember
Action Type	Standard
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Channel Revenue Management | Get Rebate Type Payouts For a Member

Fetches all rebate type payouts for a specific payout period provided by the user, returning a list of records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetRebateTypePayoutsForMember
Action Type	Standard
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Channel Revenue Management | Get Rebate Type Payout Sources

Fetches all rebate type payout sources for a specific rebate type payout provided by the user.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetRebateTypePayoutSourcesForMember
Action Type	Standard
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Channel Revenue Management | Summarize Rebate Payouts by Period

Retrieves a rebate program member's payout summary for a specified period.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	RebateProgramMemberSummaryPerPayoutPeriod
Action Type	Standard

Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Channel Revenue Management | Summarize Rebate Payouts for a Member

Retrieves the overall rebate payout summary for a specified member.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	OverallMemberSummary
Action Type	Standard
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Channel Revenue Management | Summarize Rebate Type Payout Source

Generates a summary of a Rebate Type Payout Source, including the aggregates, benefits, and top transaction journals considered for the payout.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	RebateTypePayoutSourceSummary
Action Type	Standard
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Collections and Recovery | Compile Script for Next Call Based on Previous Collections Interactions

Gets recent voice call records and their transcripts, truncates the combined transcript text to a predefined character length, and provides the summary to the user. Also, gathers notes associated with the collection plan, combines note titles and text previews, truncates this combined text to a predefined length, and provides the summary to the user. Compiles a call script for collections specialists for their next customer conversation.

REQUIRED EDITIONS

Available in: Lightning Experience

Financial Services Cloud: **Enterprise, Performance, and Unlimited** Editions with the Einstein for Financial Services add-on license.

USER PERMISSIONS NEEDED

To compile script for the next call:

Collections and Recovery Specialist

USER PERMISSIONS NEEDED

AND

Einstein for Financial Services

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CompileScriptForNextCallBasedOnPreviousCollectionsInteractions
Reference Action Type	Prompt
Reference Action	Compile Script for Next Call Based on Previous Collections Interactions
Does this action execute one or more prompt templates?	Yes

Compile Script for Next Call Based on Previous Collections Interactions and Prompt Templates

This action calls the `SummarizeVoiceCallTranscriptsAndNotes` prompt template to create a call script for the customer call based on previous collections interactions.

Collections and Recovery | Create Case and Related Case Proceeding Records

Creates a case for the collection plan by using the details provided by the user. If the case type is Legal, the flow verifies if the case is eligible for legal proceedings. If it does, then it creates the related case proceeding and case proceeding participant records.

REQUIRED EDITIONS

Available in: Lightning Experience

Financial Services Cloud: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Financial Services add-on license.

USER PERMISSIONS NEEDED

To create a case and case proceeding records with the Agentforce action:

Collections and Recovery Specialist

USER PERMISSIONS NEEDED

AND

Einstein for Financial Services

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseAndRelatedCaseProceedingRecords
Reference Action Type	Flow
Reference Action	Create Case and Related Case Proceeding Records
Does this action execute one or more prompt templates?	No

Collections and Recovery | Create Promise to Pay

This action lets collections specialists create promise-to-pay agreements for borrowers. The action gets relevant collection plan record details for a collection plan ID. Gathers the payment commitment details from the user and creates a payment schedule and payment schedule item records, and sends an email to the user with the promised payment details.

REQUIRED EDITIONS

Available in: Lightning Experience

Financial Services Cloud: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Financial Services add-on license.

USER PERMISSIONS NEEDED

To create promise-to-pay agreements:

Collections and Recovery Specialist

AND

Einstein for Financial Services

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreatePromiseToPay
Reference Action Type	Flow
Reference Action	Create Promise to Pay
Does this action execute one or more prompt templates?	No

Collections and Recovery | Generate and Send Payment Link

This action creates a payment link by using the payment details provided by the user. If an email ID is available, sends an email to the borrower with the payment link details. Otherwise, shows the payment link details to the user who triggered the action.

REQUIRED EDITIONS

Available in: Lightning Experience

Financial Services Cloud: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Financial Services add-on license.

USER PERMISSIONS NEEDED

To create and send a payment link:

Collections and Recovery Specialist

AND

Einstein for Financial Services

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GenerateAndSendPaymentLink
Reference Action Type	Action
Reference Action	Generate and Send Payment Link
Does this action execute one or more prompt templates?	No

Collections and Recovery | Get Payment Method Sets for Merchant Account

This action gets a list of payment methods that are available to a merchant's customer during checkout.

REQUIRED EDITIONS

Available in: Lightning Experience

Financial Services Cloud: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Financial Services add-on license.

USER PERMISSIONS NEEDED

To get payment method sets for merchant account:

Collections and Recovery Specialist

AND

Einstein for Financial Services

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetPaymentMethodSetsForMerchantAccount
Reference Action Type	Prompt
Reference Action	Generate and Send Payment Link
Does this action execute one or more prompt templates?	No

Collections and Recovery | Request Payment Extension

This action gets relevant collection plan record details for a collection plan name. Gathers the payment commitment details from the customer and creates a payment schedule and payment schedule item records, and sends an email to the customer with the agreed payment details.

REQUIRED EDITIONS

Available in: Lightning Experience

Financial Services Cloud: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To request payment extension:

Collections and Recovery Specialist

AND

FSC Service OR FSC Sales

AND

Einstein for Financial Services

To use Agentforce:

Agentforce Service Agent User

Action Details

API Name	RequestPaymentExtensionASA
Action Type	Standard
Reference Action Type	Flow
Reference Action	Create Payment Extension for Borrowers
Inputs	Collection Plan Name, Comments, Installments, Promised Amount, Should Ignore Recent Payment Extension Request, Verified Customer Contact ID
Outputs	Payment Schedule Link for Collection Plan, Status Message
Does this action execute one or more prompt templates?	No

Collections and Recovery | Get Collection Plan Details by Name

Gets a collection plan record details by using the collection plan name, and verifies if it's related to the querying customer. If related, returns the collection plan details in a formatted string format.

REQUIRED EDITIONS

Available in: Lightning Experience

Financial Services Cloud: **Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS NEEDED

To get collection plan details by name:

Collections and Recovery Specialist

AND

FSC Service OR FSC Sales

AND

Einstein for Financial Services

To use Agentforce:

Agentforce Service Agent User

Action Details

API Name	GetCollectionPlanDetailsByNameASA
Action Type	Standard
Reference Action Type	Flow
Reference Action	Get Collection Plan Details by Name
Inputs	Collection Plan Name, Verified Customer Contact ID
Outputs	Collection Plan Details, Status Message
Does this action execute one or more prompt templates?	No

Collections and Recovery | Get Collection Plans for Related Contact and Parties

Gets a specified number of collection plans associated with a customer's contact. If required, it checks linked financial accounts for additional collection plans until the limit is reached, compiles the details, and returns them to the customer.

REQUIRED EDITIONS

Available in: Lightning Experience

Financial Services Cloud: **Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS NEEDED

To get all the collection plans associated with a customer's contact:

Collections and Recovery Specialist

AND

FSC Service OR FSC Sales

To use Agentforce:

Agentforce Service Agent User

Action Details

API Name	GetCollectionPlansForRelatedContactAndPartiesA SA
Action Type	Standard
Reference Action Type	Flow
Reference Action	Get Collection Plans for Related Contact and Parties
Inputs	Verified Customer Contact ID,
Outputs	Collection Plans, Status Message
Does this action execute one or more prompt templates?	No

Collections and Recovery | Update Representative Contact for Collections

This action gets relevant collection plan record details for a collection plan ID. Checks if the representative contact is already available. If it's available, notifies the customer that the new representative's details can't be updated. If representative contact isn't available, gathers the details from the customer, creates a new contact record using these details, and updates the collection plan record accordingly.

REQUIRED EDITIONS

Available in: Lightning Experience

Financial Services Cloud: **Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS NEEDED

To add the legal representative details to a collection plan:

Collections and Recovery Specialist

USER PERMISSIONS NEEDED

AND

FSC Service OR FSC Sales

AND

Einstein for Financial Services

To use Agentforce:

Agentforce Service Agent User

Action Details

API Name	UpdateRepresentativeContactForCollectionsASA
Action Type	Standard
Reference Action Type	Flow
Reference Action	Update Representative for Collection Plan
Inputs	Email, First Name, Last Name, Mobile, Phone, Collection Plan Name, Verified Customer Contact ID
Outputs	Status Message
Does this action execute one or more prompt templates?	No

Collections and Recovery | Answer Collections Queries

This action answers general collections-related questions from customers by using the Agentforce data library.

REQUIRED EDITIONS

Available in: Lightning Experience

Financial Services Cloud: **Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS NEEDED

To answer collections-related queries:

Collections and Recovery Specialist

USER PERMISSIONS NEEDED

AND

FSC Service OR FSC Sales

AND

Einstein for Financial Services

To use Agentforce:

Agentforce Service Agent User

Action Details

API Name	AnswerCollectionsQueriesASA
Action Type	Standard
Reference Action Type	Prompt
Reference Action	Answer Collections Queries
Inputs	Query
Outputs	Prompt Response
Does this action execute one or more prompt templates?	Yes

Communications | Get Account Record

Fetches an account record using the account number and contact email address that's associated with the account.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To use agent actions:

Einstein for Communications

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAccountRecord
Reference Action Type	Flow
Reference Action	Get Account Record
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Communications Billing Resolution

Guidelines and Considerations

- This action is a template containing example information. Customize it to your use case.

Communications | Get All Invoices

Fetches all invoices or bills associated with a specific account.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To use agent actions: Einstein for Communications

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAllInvoices
Reference Action Type	Prompt
Reference Action	Get All Invoices
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Communications Billing Resolution

Get All Invoices and Prompt Templates

This agent action calls the Get All Invoices prompt template for extracting all the invoices or bills associated with a specific invoice numbers and invoice dates.

Guidelines and Considerations

- This action is a template containing example information. Customize it to your use case.

Communications | Get Invoice Charges

Fetches the invoice charges for a given invoice to clarify billing inquiries or explain specific charges.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To use agent actions: Einstein for Communications

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetInvoiceCharges
Reference Action Type	Prompt
Reference Action	Get Invoice Charges
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Communications Billing Resolution

Get Invoice Charges and Prompt Templates

This agent action calls the Get Invoice Charges prompt template for extracting all the charges with explanation associated with a specific invoice number using a list of invoice line items, such as plan name, service name, and their corresponding amount.

Guidelines and Considerations

- This action is a template containing example information. Customize it to your use case.

Communications | Get Account Balance

Fetches and shows the balance and service details for a given account number whenever the user requests their account balance.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To use agent actions: Einstein for Communications

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAccountBalance
Reference Action Type	Prompt
Reference Action	Get Account Balance
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Communications Billing Resolution

Get Account Balance and Prompt Templates

This agent action calls the Get Account Balance prompt template for extracting the account balance and related details associated with billing using a list of services or assets and their individual balances.

Guidelines and Considerations

- This action is a template containing example information. Customize it to your use case.

Communications | Get Invoice Details

Fetches and shows key invoice details, including invoice amount, billing date, due date, and payment date, for a given invoice number provided as input.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To use agent actions: Einstein for Communications

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetInvoiceDetails
Reference Action Type	Prompt
Reference Action	Get Invoice Details
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Communications Billing Resolution

Get Invoice Details and Prompt Templates

This agent action calls the Get Invoice Details prompt template for extracting the details for a specific invoice number using invoice number, amount, invoice date, due date, paid date, and invoice URL.

Guidelines and Considerations

- This action is a template containing example information. Customize it to your use case.

Communications | Create Billing Dispute Case

Creates a case to raise a billing dispute after running the Get Account Record, Get All Invoices, Get Invoice Details, and Get Invoice Charges actions. Check the invoice number and charge for the line item in the invoice that requires a case. After the case is created, the Case Record URL is shown in the

conversation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To use agent actions: Einstein for Communications

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateBillDsptCase
Reference Action Type	Flow
Reference Action	Create Billing Dispute Case
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Communications Billing Resolution

Guidelines and Considerations

- This action is a template containing example information. Customize it to your use case.

Communications | Get Payment History

Fetch and shows recent transactions and verifies past payments.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetPaymentHistory
Reference Action Type	Prompt
Reference Action	Get Payment History
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Communications Billing Resolution

Get Payment History and Prompt Templates

This agent action calls the Get Payment History prompt template for extracting a list of payment details using payment date, amount, and payment method.

Guidelines and Considerations

- This action is a template containing example information. Customize it to your use case.

Communications | Get Service Level Objective Insights For Asset

Fetch service level objective insights for an asset by comparing the service level objective compliance criteria against the network usage data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To enable agents:

Manage AI Agents AND the admin user permission
for the agent type you want to create

USER PERMISSIONS NEEDED

OR

Customize Application

To build and manage agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To use agent actions:

Einstein for Communications

Action Details

API Name	GetSvcLvlObjInsightsForAsset
Reference Action Type	Prompt Template
Reference Action	Get Insights for Asset Service Level Objectives (getSvcLvlObjInsigt)
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Service Level Objective Insights

Get Service Level Objective Insights For Asset and Prompt Templates

This agent action calls the Get Insights for Asset Service Level Objectives prompt template to extract the analysis of the service level objectives for an asset. The analysis is based on comparing the service level objective compliance criteria against the network usage data.

Guidelines and Considerations

This action uses Data Cloud and flows. Before using this action, set up Data Cloud and customize the flow for your use case

Communications | Get Group Suggestions

Gets a list of group suggestions for quote recipients based on a criteria.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To enable agents:

Manage AI Agents AND the admin user permission for the agent type you want to create

OR

Customize Application

To build and manage agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To use agent actions:

Einstein for Communications

Action Details

API Name	GetGroupSuggestions
Reference Action Type	Standard Action
Reference Action	Get Recipient Group Suggestions (getRecipientGroupSuggestions)
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Quote Recipients Grouping

Communications | Get Quote Location Count

Gets the number of locations associated with a quote.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To enable agents:

Manage AI Agents AND the admin user permission for the agent type you want to create

OR

Customize Application

To build and manage agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To use agent actions:

Einstein for Communications

Action Details

API Name	GetQuoteLocationCount
Reference Action Type	Flow
Reference Action	Get Quote Locations Count (GetQuoteLocationsCount)
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Quote Recipients Grouping

Communications | Get Recipient Grouping Criteria

Gets the list of grouping criteria for the recipients of a quote.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To enable agents:

Manage AI Agents AND the admin user permission for the agent type you want to create

OR

Customize Application

To build and manage agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To use agent actions:

Einstein for Communications

Action Details

API Name	GetRecipientGroupingCriteria
Reference Action Type	Prompt Template
Reference Action	Get Recipient Grouping Criteria (GetRecipientGroupingCriteria)
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Quote Recipients Grouping

Get Recipient Grouping Criteria and Prompt Templates

This agent action calls the Get Recipient Grouping Criteria prompt template for extracting the list of grouping criteria for the quote recipients using the quote ID and grouping criteria field list.

Communications | Get Quote Location Fields

Gets the list of location fields to create a recipient group.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To enable agents:

Manage AI Agents AND the admin user permission for the agent type you want to create

OR

Customize Application

To build and manage agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To use agent actions:

Einstein for Communications

Action Details

API Name	GetQuoteLocationFields
Reference Action Type	Prompt Template
Reference Action	Get Location Fields (GetLocationFields)
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Quote Recipients Grouping

Get Quote Location Fields and Prompt Templates

This agent action calls the Get Location Fields prompt template for extracting the list of location fields to create a recipient group using the quote ID and user query.

Communications | Create Quote Recipient Groups

Creates groups for quote recipients based on the selected grouping options.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To enable agents:

Manage AI Agents AND the admin user permission for the agent type you want to create

OR

Customize Application

To build and manage agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To use agent actions:

Einstein for Communications

Action Details

API Name	CreateQuoteRecipientGroups
Reference Action Type	Standard Action
Reference Action	Create Quote Recipient Groups (createQuoteRecipientGroups)

Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Quote Recipients Grouping

Communications | Update Quote Recipient Group Name

Updates the name of a quote recipient group.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To enable agents:

Manage AI Agents AND the admin user permission for the agent type you want to create

OR

Customize Application

To build and manage agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To use agent actions:

Einstein for Communications

Action Details

API Name	UpdateQuoteRecipientGroupName
Reference Action Type	Flow
Reference Action	Update Quote Recipient Group Name (UpdtQuoteRcptGrpName)
Does this action execute one or more prompt	No

templates?	
Required Setup	Agentforce for Quote Recipients Grouping

Communications | Get Add-On Products

Gets a list of compatible add-on products for a customer's existing asset, including associated pricing data. This action requires the asset ID and pricebook ID for successful completion.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To use agent actions: Einstein for Communications

 **Example** See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAddOnProducts
Reference Action Type	Flow
Reference Action	Get Add-On Products
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Product Upsell and Cross-sell in Service

Guidelines and Considerations

- This action is a template containing example information. Customize it to your use case.

Communications | Get Cross-Sell Products

Gets a list of active cross-sell product suggestions, including pricing, for a specified account, catalog, and category.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To use agent actions: Einstein for Communications

 **Example** See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCrossSellProducts
Reference Action Type	Flow
Reference Action	Get Cross-Sell Products
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Product Upsell and Cross-sell in Service

Guidelines and Considerations

- This action is a template containing example information. Customize it to your use case.

Communications | Get Upgrade Products

Gets active upgrade product suggestions and pricing for a specified account and price book.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To use agent actions: Einstein for Communications

 **Example** See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetUpgradeProducts
Reference Action Type	Flow
Reference Action	Get Upgrade Products
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Product Upsell and Cross-sell in Service

Guidelines and Considerations

- This action is a template containing example information. Customize it to your use case.

Communications | Create Sales Quote

Creates a sales quote for specified products.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To use agent actions: Einstein for Communications

 **Example** See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateSalesQuote
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Reference Action Type	Flow
Reference Action	Create Sales Quote
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Product Upsell and Cross-sell in Service

Guidelines and Considerations

- This action is a template containing example information. Customize it to your use case.

Communications | Format Product Recommendations

Formats product data into a structured display of exactly three recommended products with consistent formatting.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Communications add-on or included in Agentforce 1 Communications Edition. Requires each user to have the Agentforce for Communications add-on to access the action.

USER PERMISSIONS NEEDED

To use agent actions:	Einstein for Communications
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 **Example** See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FormatProductRecommendations
Reference Action Type	Flow
Reference Action	Format Product Recommendations
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Product Upsell and Cross-sell in Service

Guidelines and Considerations

- This action is a template containing example information. Customize it to your use case.

Digital Lending | Retrieve Loan Product Categories

Retrieves the product categories for loan product assistance.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS NEEDED

To access Digital Lending and Access Loan Product Assistance template:

DigitalLendingAddOn

AND

DigitalOriginationAgentforceAddOn

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	RetrieveLoanProductCategories
Inputs	limit
Outputs	errorMessage, loanCategories
Does this action execute one or more prompt templates?	No

Digital Lending | Retrieve Products By Category

Retrieves the active product records associated with the specified category.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS NEEDED

To access Digital Lending and Access Loan Product Assistance template: **DigitalLendingAddOn**

AND

DigitalOriginationAgentforceAddOn

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	RetrieveProductsByCategory
Reference Action Type	Flow
Reference Action	Retrieve Products By Category
Does this action execute one or more prompt templates?	No

Digital Lending | Retrieve Product Details

Retrieves product and its related records such as product fee, product list rate, term related object, and term.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, and Unlimited** Editions.

USER PERMISSIONS NEEDED

To access Digital Lending and Access Loan Product Assistance template: **DigitalLendingAddOn**

AND

DigitalOriginationAgentforceAddOn

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	RetrieveProductDetails
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Reference Action Type	Flow
Reference Action	Retrieve Product and Product-Related Details
Does this action execute one or more prompt templates?	No

Digital Lending | Retrieve Programs By Product

This action retrieves programs associated with the specified loan product.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, and Unlimited** Editions.

USER PERMISSIONS NEEDED

To access Digital Lending and Access Loan Product Assistance template: **DigitalLendingAddOn**

AND

DigitalOriginationAgentforceAddOn

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	RetrieveProgramsByProduct
Reference Action Type	Flow
Reference Action	Retrieve Programs By Product
Does this action execute one or more prompt templates?	No

Digital Lending | Retrieve Program Details

Retrieves the program details with the associated product fee, product list rate and terms.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, and Unlimited** Editions.

USER PERMISSIONS NEEDED

To access Digital Lending and Access Loan Product
Assistance template: DigitalLendingAddOn

AND

DigitalOriginationAgentforceAddOn

[See Common User Access for Standard Agent Actions.](#)

Action Details

API Name	RetrieveProgramDetails
Reference Action Type	Flow
Reference Action	Retrieve Program and Program-Related Details
Does this action execute one or more prompt templates?	No

Digital Lending | Analyze Estimated Loan Amount

Determines the estimated loan amount based on the monthly payment and loan tenure you provide. The action uses the product list rate of the specified product or a nominal rate to calculate the annual interest rate.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, and Unlimited** Editions.

USER PERMISSIONS NEEDED

To access Digital Lending and Access Loan Product
Assistance template: DigitalLendingAddOn

AND

DigitalOriginationAgentforceAddOn

[See Common User Access for Standard Agent Actions.](#)

Action Details

API Name	AnalyzeEstimatedLoanAmount
Reference Action Type	Flow
Reference Action	Analyze Estimated Loan Amount
Does this action execute one or more prompt templates?	No

Education Cloud | Create Academic Interest (Beta)

Create an academic interest record for a prospective student so that a recruiter can contact them.

REQUIRED EDITIONS

Example

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

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

PERMISSIONS NEEDED

To use Education Cloud:

Education Cloud Full Access

OR

Education Cloud - Limited Access

OR

Education Cloud for Experience Cloud User

OR

Education Cloud - Guest Access

PERMISSIONS NEEDED

To use Agentforce:

Agentforce Foundations

OR

Einstein for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateAcademicInterest
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Education Cloud | Create Admissions Application (Beta)

Start an admissions application by creating application records for the applicant.

REQUIRED EDITIONS



Example

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

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

PERMISSIONS NEEDED

To use Education Cloud:

Education Cloud Full Access

OR

Education Cloud - Limited Access

PERMISSIONS NEEDED

OR

Education Cloud for Experience Cloud User

OR

Education Cloud - Guest Access

To use Agentforce:

Agentforce Foundations

OR

Einstein for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateAdmissionsApplication
Reference Action Type	Connect API
Does this action execute one or more prompt templates?	No

Education Cloud | Create Campus Tour Registration

Registers a contact for a campus tour by creating a campaign member record related to the campus tour campaign record.

REQUIRED EDITIONS

 **Example**

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

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

PERMISSIONS NEEDED

To use Education Cloud:

Education Cloud Full Access

OR

Education Cloud - Limited Access

OR

Education Cloud for Experience Cloud User

OR

Education Cloud - Guest Access

To use Agentforce:

Agentforce Foundations

OR

Einstein for Education Cloud

[See Common User Access for Standard Agent Actions.](#)

Action Details

API Name	CreateCampusTourRegistration
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Education Cloud | Create Course Offering Channel

Creates a course offering channel and adds participants to it.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

PERMISSIONS NEEDED

To use Agentforce: Agentforce for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCourseOfferingChannel
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Education Cloud | Create Inquiry

Creates a case, an educational info request, and an academic interest raised by prospective students, parents, or counselors. Call this action when there isn't an answer to the user's question.

REQUIRED EDITIONS**Example**

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

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

PERMISSIONS NEEDED

To use Education Cloud: Education Cloud Full Access

OR

Education Cloud - Limited Access

OR

Education Cloud for Experience Cloud User

PERMISSIONS NEEDED

OR

Education Cloud - Guest Access

To use Agentforce:

Agentforce Foundations

OR

Einstein for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateInquiry
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Education Cloud | Find Advising Cases

Finds the advising cases related to a student.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

USER PERMISSIONS NEEDED

To use Agentforce:

Agentforce for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindAdvisingCases
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Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Education Cloud | Find Campus Resources

Performs a semantic search and finds relevant campus resources to assist an advisor with a student's query.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

USER PERMISSIONS NEEDED

To use Agentforce: Agentforce for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindCampusResources
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Education Cloud | Get Academic Term Data (Beta)

Use this action to get the academic term data based on the academic term name and academic level.

REQUIRED EDITIONS

Example

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

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

PERMISSIONS NEEDED

To use Education Cloud:

Education Cloud Full Access

OR

Education Cloud - Limited Access

OR

Education Cloud for Experience Cloud User

OR

Education Cloud - Guest Access

To use Agentforce:

Agentforce Foundations

OR

Einstein for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAcademicTermData
Reference Action Type	Invocable Action
Does this action execute one or more prompt templates?	No

Education Cloud | Get Campus Tour Campaigns

Finds and returns active campus tour campaign records.

REQUIRED EDITIONS





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

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

PERMISSIONS NEEDED

To use Education Cloud:

Education Cloud Full Access

OR

Education Cloud - Limited Access

OR

Education Cloud for Experience Cloud User

OR

Education Cloud - Guest Access

To use Agentforce:

Agentforce Foundations

OR

Einstein for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCampusTourCampaigns
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Education Cloud | Get Course Syllabus Canvas Layout

Generates a course syllabus canvas layout.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

PERMISSIONS NEEDED

To use Agentforce: Agentforce for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCourseSyllabusCanvasLayout
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Education Cloud | Get Learning Courses (Beta)

Use this action to find and retrieve learning courses based on the user's query.

REQUIRED EDITIONS

Example

 **Note** Course Search in Agentforce for Education Cloud is a pilot or beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the [Product Terms Directory](#). Use of this pilot or beta service is at the Customer's sole discretion.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

PERMISSIONS NEEDED

To use Education Cloud:

Education Cloud Full Access

OR

Education Cloud - Limited Access

OR

Education Cloud for Experience Cloud User

OR

Education Cloud - Guest Access

To use Agentforce:

Agentforce Foundations

OR

Einstein for Education Cloud

To use Prompt Builder:

Prompt Template Manager

Action Details

API Name	GetLearningCourse
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Get Learning Courses (Beta) and Prompt Templates

This action uses the Get Learning Courses prompt template to provide a list of learning courses based on the user's query.

Education Cloud | Get Learning Program Data (Beta)

Use this action to get the learning program data based on the learning program name and academic term ID.

REQUIRED EDITIONS



Example



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

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

PERMISSIONS NEEDED

To use Education Cloud:

Education Cloud Full Access

OR

Education Cloud - Limited Access

OR

Education Cloud for Experience Cloud User

OR

Education Cloud - Guest Access

To use Agentforce:

Agentforce Foundations

OR

Einstein for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetLearningProgram_Data
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Get Learning Program Data (Beta) and Prompt Templates

This action uses the Get Learning Programs prompt template to provide a list of available learning programs that matches the user's search criteria.

Education Cloud | Get Program Term Application Timeline Data (Beta)

Use this action to get the program term application timeline data based on the academic term ID and learning program ID.

REQUIRED EDITIONS

Example

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

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

PERMISSIONS NEEDED

To use Education Cloud:

Education Cloud Full Access

OR

Education Cloud - Limited Access

OR

Education Cloud for Experience Cloud User

OR

Education Cloud - Guest Access

To use Agentforce:

Agentforce Foundations

OR

Einstein for Education Cloud

PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetProgramTermApplicationTimelineData
Reference Action Type	Invocable Action
Does this action execute one or more prompt templates?	No

Education Cloud | Summarize Advising Case

Summarizes a student's advising case.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

USER PERMISSIONS NEEDED

To use Agentforce: Agentforce for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeAdvisingCase
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Education Cloud | Suggest Student Goals (Beta)

Generates personalized, actionable goals for a student based on their profile, preferences, and assessments, supporting their personal growth, skill development, and career readiness.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

USER PERMISSIONS NEEDED

For advisors to use Education Cloud:

Education Cloud Full Access

OR

Education Cloud - Limited Access

OR

Education Cloud - Guest Access

AND

Agentforce for Education Cloud

For students to use Agentforce:

Education Cloud for Experience Cloud User

Example

 **Note** Student Goals Agent is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

Action Details

API Name	SuggestStudentGoals
Reference Action Type	Standard
Does this action execute one or more prompt templates?	Yes

Guidelines and Considerations

The product is available only in English and is not supported in other languages.

Education Cloud | Create Goal (Beta)

Creates a goal assignment record related to a contact based on the specified values.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

USER PERMISSIONS NEEDED

For advisors to use Education Cloud:

Education Cloud Full Access

OR

Education Cloud - Limited Access

OR

Education Cloud - Guest Access

AND

Agentforce for Education Cloud

For students to use Agentforce:

Education Cloud for Experience Cloud User



Example

Note Student Goals Agent is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

Action Details

API Name	CreateGoal
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

The product is available only in English and is not supported in other languages.

Experience Builder | Draft Text for Experience Builder Site (Beta)

Creates or revises text in the Text Block component on enhanced Lightning Web Runtime (LWR) sites in Experience Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To access Experience Builder:

- Create and Set Up Experiences AND View Setup and Configuration AND be a member of the site
- OR
- View Setup and Configuration AND be a member of the site AND have appropriate [role-based site access](#)

To execute actions in Experience Builder Agent:

A permission set or profile that includes access to the Experience Builder Agent

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ExpBuilderDraftOrRefineText
Does this action execute one or more prompt templates?	Yes
Required Setup	Set Up Agentforce for Experience Builder

Example

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

Draft Text for Experience Builder Site and Prompt Templates

This action calls an internal invocable action, which uses internal-only prompt templates to create and revise text for enhanced LWR sites in Experience Builder.

Guidelines and Considerations

- This action can draft or revise text in a Text Block component that's already on the canvas, but it can't add or remove a component from the canvas.
- You can ask the agent to revise the text in a different tone, or based on a different main message.
- This action can only generate text. It can't format or style the text, such as make it boldface or change its color.

Field Service | Assign Appointment to Service Resource for Field Service

Assigns the service appointment selected by the dispatcher to a service resource, in the gap identified in the service resource's schedule on a specific date. This action is one of the actions provided by the Agentforce: Field Service Actions feature.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce or Einstein for Field Service or Industry add-on or included in Einstein 1 Edition or Agentforce 1 Edition for Field Service. Requires each user to have the Agentforce or Einstein for Field Service or Industry add-on to access the action.

USER PERMISSIONS NEEDED

To use Field Service topics and actions: Access Agent Topics and Actions for Field Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	AssignApptForServiceResourceForFieldService
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set Up the Field Service Dispatcher Actions Topic

See Also

Agent Topic: Field Service Dispatcher Actions

Agent Action: Get Appointments to Fill Gaps for Field Service

Fill Gaps in a Service Resource's Schedule with Agentforce

Field Service | Cancel Appointment for Field Service

Cancels the service appointment.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CancelApptForFieldService
Reference Action Type	Flow
Reference Action	Field Service: Cancel Service Appointment
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

See [Considerations for Autonomous Scheduling for Field Service](#).

See Also

[Salesforce Help: Autonomous Scheduling for Field Service](#)

Field Service | Create Appointment for Field Service

Creates a service appointment for Field Service.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions** with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateApptForFieldService
Reference Action Type	Flow
Reference Action	Field Service: Create Service Appointment
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

See [Considerations for Autonomous Scheduling for Field Service](#).

See Also

[Salesforce Help: Autonomous Scheduling for Field Service](#)

Field Service | Create Appointment List Filter for Field Service

Creates a filter for the service appointment list in the dispatcher console. If a user triggers QueryRecords to retrieve service appointments with certain criteria and then asks to see the service appointments in the appointment list, the action creates a filter in the Appointment List containing the service appointments returned by Agentforce. This action is one of the actions provided by the Agentforce: Field Service Actions feature

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions** with the Agentforce or Einstein for Field Service or Industry add-on or included in Einstein 1 Edition or Agentforce 1 Edition for Field Service. Requires each user to have the Agentforce or Einstein for Field Service or Industry add-on to access the action.

USER PERMISSIONS NEEDED

To use Field Service Scheduling Summary and Create Filter actions:

Access Agent Topics and Actions for Field Service

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateApptListFilter
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Einstein for Field Service

Considerations and Limitations

See [Considerations and Limitations for Creating Appointment List Filters](#).

Field Service | Get Appointment Information for Field Service

Gets information about service appointments.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetApptInfoForFieldService
Reference Action Type	Flow
Reference Action	Field Service: Get Appointment Information
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

See [Considerations for Autonomous Scheduling for Field Service](#).

See Also

[Salesforce Help: Autonomous Scheduling for Field Service](#)

Field Service | Get Appointment Time Slots for Field Service

Gets a list of available time slots for the service appointment.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetApptTimeSlotsForFieldService
Reference Action Type	Flow
Reference Action	Field Service: Get Appointment Time Slots
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

See [Considerations for Autonomous Scheduling for Field Service](#).

See Also

[Salesforce Help: Autonomous Scheduling for Field Service](#)

Field Service | Get Appointments By Criteria for Field Service

Gets service appointments according to the specified criteria. This action is part of Customer Outreach, which is an Agentforce Scheduling feature.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAppointmentsByCriteria
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Autonomous Scheduling

Guidelines and Considerations

See [Considerations for Autonomous Scheduling for Field Service](#).

See Also

[Salesforce Help: Autonomous Scheduling for Field Service](#)

Field Service | Get Appointments to Fill Gaps for Field Service

Searches for gaps for a specific service resource on a specific date and returns a list of suitable appointments in ranked order, considering business rules and objectives. This action is one of the actions provided by the Agentforce: Field Service Actions feature.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce or Einstein for Field Service or Industry add-on or included in Einstein 1 Edition or Agentforce 1 Edition for Field Service. Requires each user to have the Agentforce or Einstein for Field Service or Industry add-on to access the action.

USER PERMISSIONS NEEDED

To use Field Service topics and actions: Access Agent Topics and Actions for Field Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	Get Appointments to Fill Gaps for Field Service
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set Up the Field Service Dispatcher Actions Topic

See Also

[Agent Topic: Field Service Dispatcher Actions](#)

[Agent Action: Assign Appointment to Service Resource for Field Service](#)

[Fill Gaps in a Service Resource's Schedule with Agentforce](#)

Field Service | Get Current Time for Field Service

Gets the current time according to the time zone. The time zone is taken from the operating hours that are associated with the service appointment's service territory.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCurrentTimeForFieldService
Reference Action Type	Flow
Reference Action	Field Service: Get Current Time
Does this action execute one or more prompt templates?	No

templates?	
Required Setup	Set Up Autonomous Scheduling

Guidelines and Considerations

See [Considerations for Autonomous Scheduling for Field Service](#).

[Field Service | Get Engagement Topics for Field Service](#)

Retrieves an engagement topic's topic ID and object name for the current messaging session. The engagement topic is used to connect between a messaging session and a service appointment.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetEngagementTopicsForFieldService
Reference Action	getEngagementTopics
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Autonomous Scheduling

Guidelines and Considerations

If you remove this action from the Appointment Management for Field Service topic, you can't view conversations in the Agentforce Scheduling Supervisor View.

See [Considerations for Autonomous Scheduling for Field Service](#).

See Also

[Salesforce Help: Autonomous Scheduling for Field Service](#)

Field Service | Get Work Types for Field Service

Gets the org's work types.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetWorkTypesForFieldService
Reference Action Type	Flow
Reference Action	Field Service: Get Work Types
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

See [Considerations for Autonomous Scheduling for Field Service](#).

See Also

[Salesforce Help: Autonomous Scheduling for Field Service](#)

Field Service | Rebook and Notify for Field Service

Notifies the customer that their service appointment needs to be rescheduled. This action is part of Customer Outreach, which is an Agentforce Scheduling feature.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	RebookNotifyForFieldService
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Autonomous Scheduling

Guidelines and Considerations

See [Considerations for Autonomous Scheduling for Field Service](#).

See Also

[Salesforce Help: Autonomous Scheduling for Field Service](#)

Field Service | Refine Post-Work Summary for Field Service

Refines and adds information to a summary of a Salesforce work order record, based on user utterance.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Agentforce or Einstein for Field Service or Industry add-on or included in Einstein 1 Edition or Agentforce 1 Edition for Field Service. Requires each user to have the Agentforce or Einstein for Field Service or Industry add-on to access the action.

User Permissions Needed	
To use agent actions for Field Service:	Access Agent Topics and Actions for Field Service
See Common User Access for Standard Agent Actions .	

API Name	RefinePostWorkSummary
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes

Required Setup	Einstein for Field Service
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Refine Post-Work Summary for Field Service and Prompt Templates

The Refine Post-Work Summary for Field Service agent action uses an internal-only prompt template.

Field Service | Schedule Appointment for Field Service

Schedules a service appointment based on a scheduling policy.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ScheduleApptForFieldService
Reference Action Type	Flow
Reference Action	Field Service: Schedule Service Appointment
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

See [Considerations for Autonomous Scheduling for Field Service](#).

See Also

[Salesforce Help: Autonomous Scheduling for Field Service](#)

Field Service | Summarize Scheduling Issues for Field Service

Creates a summary of the total number of appointments that require immediate attention. The summary is divided according to exception categories. The agent action creates a filter for each category in the appointment list. This action is one of the actions provided by the Agentforce: Field Service Actions

feature. The categories used by the reports are customizable.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce or Einstein for Field Service or Industry add-on or included in Einstein 1 Edition or Agentforce 1 Edition for Field Service. Requires each user to have the Agentforce or Einstein for Field Service or Industry add-on to access the action.

USER PERMISSIONS NEEDED

To use Field Service Scheduling Summary and Create Filter actions:

Access Agent Topics and Actions for Field Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeSchedulingIssues
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes
Required Setup	Einstein for Field Service

Summarize Scheduling Issues and Prompt Templates

This action calls the Summarize Scheduling Issues for Field Service standard invocable action, which uses internal-only prompt templates to create scheduling-issue summaries.

Considerations and Limitations

See [Considerations and Limitations for Getting a Daily Summary](#).

Field Service | Summarize Service Appointment Notes

Generates a summary of one or more service appointment notes. The output depends on the prompt templates the user has access to.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce or Einstein for Field Service or Industry add-on or included in Einstein 1 Edition or Agentforce 1 Edition for Field Service. Requires each user to have the Agentforce or Einstein for Field Service or Industry add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeApptNotes
Reference Action Type	Standard Action
Reference Action	Summarize Appointment Notes
Does this action execute one or more prompt templates?	Yes

Summarize Appointment Notes and Prompt Templates

This agent action calls the Summarize Appointment Notes standard invocable action to create service appointment note summaries. The Summarize Appointment Notes standard invocable action identifies notes for appointments based on the status category, start date, and end date. The Scheduled Start and Scheduled End OR the Actual Start and Actual End are checked to make sure that they fall within the start and end date range. If a date range isn't provided, the agent action considers appointments for the past 6 months and provided status category.

Considerations

- The status category input must be an actual Status Category on the service appointment.
- The start date and end date range can't exceed 6 months.
- Only service appointment records and the Service Note field can be summarized. Data Cloud and other data sources aren't supported.
- Users can't refine a previously generated summary.
- The summary doesn't include news related to the account or company.

Field Service | Update Appointment Times for Field Service

Updates the service appointment time fields.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	UpdateApptTimesForFieldService
Reference Action Type	Flow
Reference Action	Field Service: Update Appointment Arrival Window
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

See [Considerations for Autonomous Scheduling for Field Service](#).

See Also

[Salesforce Help: Autonomous Scheduling for Field Service](#)

Financial Services | Create Action Plan

Create an action plan item for an action plan. Enter the item name, status, priority, and due date.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

PERMISSIONS NEEDED

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateActionPlan
Reference Action Type	Flow
Reference Action	Create Action Plan
Does this action execute one or more prompt templates?	No
Required Setup	Financial Advisor Assistance

Financial Services | Create Action Plan Item

Create an action plan for a client. When available, use the meeting notes.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateActionPlanItem
Reference Action Type	Flow
Reference Action	Create Action Plan Item
Does this action execute one or more prompt templates?	No
Required Setup	Financial Advisor Assistance

Financial Services | Create Case to Block Card

Creates a case to block a card.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseToBlockCard
Reference Action Type	Integration Procedure
Reference Action	ReportLostCard_CreateCase
Does this action execute one or more prompt templates?	No

Financial Services | Fulfill Fee Reversal

Creates a case to reverse a fee charged on a financial account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FulfillFeeReversal
Reference Action Type	Integration Procedure
Reference Action	FSC_FulfillFeeReversal
Does this action execute one or more prompt templates?	No

Financial Services | Create Case for Account Address Update

Creates a case to update the address for an account or a financial account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseForAcctAddrUpdt
Reference Action Type	Integration Procedure
Reference Action	FSCAddressUpdate_CreateCase
Does this action execute one or more prompt templates?	No

Financial Services | Create Case for Change Billing Cycle

Creates a case to change the billing cycle for a credit card.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseForChangeBillingCycle
Reference Action Type	Integration Procedure
Reference Action	FSCRtIChgBillCycl_CreateCase
Does this action execute one or more prompt templates?	No

Financial Services | Create Case for Lock Or Unlock Card

Creates a case to change the lock or unlock status of a card.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseForLockUnlockCard
Reference Action Type	Integration Procedure
Reference Action	FSCRtILkUnlckCard_CreateCase
Does this action execute one or more prompt templates?	No

Financial Services | Create Case for Manage Card Settings

Creates a case to manage card settings.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseForManageCardSettings
Reference Action Type	Integration Procedure
Reference Action	ManageCardUsage_CreateCase
Does this action execute one or more prompt templates?	No

Financial Services | Create Case for Order Checkbook

Creates a case for the new checkbook request.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseForOrderCheckbook
Reference Action Type	Integration Procedure
Reference Action	OrderCheckbook_CreateCase
Does this action execute one or more prompt templates?	No

Financial Services | Create Case for Request Loan Payoff Statement

Creates a case for a request for a loan payoff statement.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseForRequestLoanPayoffStatements
Reference Action Type	Integration Procedure
Reference Action	RequestLoanPayoffStatement_CreateCase
Does this action execute one or more prompt templates?	No

Financial Services | Create Case for Request Statement Copies

Creates a case to process a request for copies of a financial account statement.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseForRequestStatementCopies
Reference Action Type	Integration Procedure
Reference Action	RequestStatementCopies_CreateCase
Does this action execute one or more prompt templates?	No

Financial Services | Create Case for Stop Check Payment

Creates a case to stop a check payment for a financial account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseForStopCheckPayment
Reference Action Type	Integration Procedure
Reference Action	StopCheckPayment_CreateCase
Does this action execute one or more prompt templates?	No

Financial Services | Create Case for Transaction Dispute

Creates a case for a transaction dispute request.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseForTransactionDispute
Reference Action Type	Integration Procedure
Reference Action	FSCTxnDisputeMgmt_DisputeCreateCase
Does this action execute one or more prompt templates?	No

Financial Services | Create Case for Transfer Funds

Creates a case to transfer funds between the customer's financial accounts. Supports transfers between internal-to-internal accounts, external-to-internal accounts, and internal-to-external accounts, including Own Account Transfers, Loan Payments, and Credit Card Payments.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseForTransferFunds
Reference Action Type	Integration Procedure
Reference Action	TransferFundsToOwnAccount_CreateCase
Does this action execute one or more prompt templates?	No

Financial Services | Create Case for Travel Notification

Creates a case to notify the bank about the upcoming trips. Helps customers avoid card-related issues during their trips.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCaseForTravelNotification
Reference Action Type	Integration Procedure
Reference Action	NotifyTravelPlans_CreateCase
Does this action execute one or more prompt templates?	No

Financial Services | Create Financial Goal

Collect the account ID, start date, status, type, target amount, priority, target date and name. Create a financial goal for the account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateFinancialGoal
Reference Action Type	Flow
Reference Action	Create Financial Goal
Does this action execute one or more prompt templates?	No
Required Setup	Financial Advisor Assistance

Financial Services | Create Financial Plan

Collect the account ID, name, start date, status, and type. Create a financial plan related to the account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateFinancialPlan
Reference Action Type	Flow
Reference Action	Create Financial Plan
Does this action execute one or more prompt templates?	No
Required Setup	Financial Advisor Assistance

Financial Services | Create Interest Tag

Extract interest tags from the meeting notes. Show the extracted interest tags to wealth management advisor, who can then select the interest tags to create.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateInterestTag
Reference Action Type	Prompt Template
Reference Action	Create Interest Tag
Does this action execute one or more prompt templates?	Yes
Required Setup	Financial Advisor Assistance

Financial Services | Create Person Life Event

Collect the account ID, name, date and type. Create a person life event related to the account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreatePersonLifeEvent
Reference Action Type	Flow
Reference Action	Create Person Life Event
Does this action execute one or more prompt templates?	No

Required Setup	Financial Advisor Assistance
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Financial Services | Create Record Alert

Collect the account ID, start date, description, and subject. Create a record alert for the account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateRecordAlert
Reference Action Type	Flow
Reference Action	Create Record Alert

Does this action execute one or more prompt templates?	No
Required Setup	Financial Advisor Assistance

Financial Services | Create or Update Agenda Draft

Collect the note ID and agenda draft. Create or update the agenda draft.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateOrUpdateAgendaDraft
Reference Action Type	Flow

Reference Action	Create or Update Agenda Draft
Does this action execute one or more prompt templates?	No
Required Setup	Financial Advisor Assistance

Financial Services | Create Interaction

This action lets relationship managers create interaction records for meetings and conversations with clients or partners. The action identifies the account name from the conversation. If the account name is unknown, the action prompts the user to provide either the account ID or interaction ID before creating an interaction record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Financial Services add-on or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.

USER PERMISSIONS NEEDED

To create an interaction for the meeting:

Access Banking Relationship Assistance

AND

Einstein for Financial Services

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateInteraction
Reference Action Type	Flow
Reference Action	Create Interaction
Does this action execute one or more prompt templates?	No

Considerations

- The action creates records automatically to keep the conversation smooth. If you need user

confirmation for record creation, clone the action and add the necessary confirmation steps.

Financial Services | Create Interaction Summary

Log meeting notes, next steps, and related records based on meeting discussion with interaction summary records. The action identifies the account name from the conversation. If the account name is unknown, the action prompts the user to provide either the account ID or interaction ID before creating an interaction summary record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Financial Services add-on or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.

USER PERMISSIONS NEEDED

To create an interaction summary for the meeting:

Access Banking Relationship Assistance

AND

Einstein for Financial Services

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateInteractionSum
Reference Action Type	Flow
Reference Action	Create Interaction Summary
Does this action execute one or more prompt templates?	No

Considerations

- The action creates records automatically to keep the conversation smooth. If you need user confirmation for record creation, clone the action and add the necessary confirmation steps.

Financial Services | Create Interaction Attendee

Creates an interaction attendee record to capture an attendee of the meeting.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Financial Services add-on or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.

USER PERMISSIONS NEEDED

To create an interaction attendee:

Access Banking Relationship Assistance

AND

Einstein for Financial Services

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateInteractionAttendee
Reference Action Type	Flow
Reference Action	Create Interaction Attendee
Does this action execute one or more prompt templates?	No

Considerations

- The action creates records automatically to keep the conversation smooth. If you need user confirmation for record creation, clone the action and add the necessary confirmation steps.

Financial Services | Create Account Plan Objective

Use Agentforce to create account plan objective records for strategic initiatives pursued by a relationship team with a client or a partner.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Financial Services add-on or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.

USER PERMISSIONS NEEDED

To create an account plan objective based on meeting discussion:

Access Banking Relationship Assistance

AND

Einstein for Financial Services

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateAccountPlanObj
Reference Action Type	Flow
Reference Action	Create Account Plan Objective
Does this action execute one or more prompt templates?	No

Considerations

- The action creates records automatically to keep the conversation smooth. If you need user confirmation for record creation, clone the action and add the necessary confirmation steps.

Financial Services | Create Account Plan Objective Measure

Creates an account plan objective measure record to store the performance of target metrics for an objective associated with the account plan.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Financial Services add-on or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.

USER PERMISSIONS NEEDED

To create an account plan objective measure:

Access Banking Relationship Assistance

AND

Einstein for Financial Services

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateAccountPlanObjectiveMeasure
Reference Action Type	Flow
Reference Action	Create Account Plan Objective Measure
Does this action execute one or more prompt templates?	No

Considerations

- The action creates records automatically to keep the conversation smooth. If you need user confirmation for record creation, clone the action and add the necessary confirmation steps.

Financial Services | Create Opportunity Based on Meeting Notes

Creates an opportunity record based on meeting notes captured during interaction with the client. The action identifies the account name from the conversation. If the account name is unknown, the action prompts the user to provide account ID to log an opportunity.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Financial Services add-on or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.

USER PERMISSIONS NEEDED

To create an opportunity based on meeting notes:

Access Banking Relationship Assistance

USER PERMISSIONS NEEDED

AND

Einstein for Financial Services

[See Common User Access for Standard Agent Actions.](#)

Action Details

API Name	CreateOpportunity
Reference Action Type	Flow
Reference Action	Create Opportunity
Does this action execute one or more prompt templates?	No

Considerations

- The action creates records automatically to keep the conversation smooth. If you need user confirmation for record creation, clone the action and add the necessary confirmation steps.

Financial Services | Create Summary Document

Creates summary doc records for meetings and conversations with clients or partners. Requires a reference record ID to proceed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Agentforce for Financial Services add-on license or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.

USER PERMISSIONS NEEDED

To restructure meeting notes:

Access Banking Relationship Assistance

AND

Einstein for Financial Services

[See Common User Access for Standard Agent Actions.](#)

Action Details

API Name	CreateSummaryDocument
Reference Action Type	Flow
Reference Action	Create Summary Document
Does this action execute one or more prompt templates?	No

Considerations

- The action is only invoked when the user's request clearly indicates the intent to generate a document.

Financial Services | Extract Action Plans

Extract action plans from meeting notes. Identify one or more action plans, statuses, and start dates for wealth management advisors.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

PERMISSIONS NEEDED

	Financial Advisor Assistance setting
To use Financial Account Management standard objects:	Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ExtractActionPlans
Action Type	Standard
Reference Action Type	Prompt Template
Reference Action	Extract Action Plans
Does this action execute one or more prompt templates?	Yes
Required Setup	Financial Advisor Assistance

Financial Services | Extract Financial Goals

Extract financial goals from meeting notes. Identify financial goals, types, statuses, priorities, start dates, target amounts, and target dates for wealth management advisors.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

PERMISSIONS NEEDED

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).**Action Details**

API Name	ExtractFinancialGoals
Reference Action Type	Prompt Template
Reference Action	Extract Financial Goals
Does this action execute one or more prompt templates?	Yes
Required Setup	Financial Advisor Assistance

Financial Services | Extract Financial Plans

Extract financial plans from meeting notes. Identify financial plans, types, statuses, priorities, start dates, target amounts, and target dates for wealth management advisors.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, and Unlimited** Editions**PERMISSIONS NEEDED**

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

PERMISSIONS NEEDED

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ExtractFinancialPlans
Reference Action Type	Prompt Template
Reference Action	Extract Financial Plans
Does this action execute one or more prompt templates?	Yes
Required Setup	Financial Advisor Assistance

Financial Services | Extract Person Life Events

Extract person life events from meeting notes. Identify life events, types, and dates for wealth management advisors.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ExtractPersonLifeEvents
Reference Action Type	Prompt Template
Reference Action	Extract Person Life Events
Does this action execute one or more prompt templates?	Yes
Required Setup	Financial Advisor Assistance

Financial Services | FinServ Package Create Financial Goal (FSC Managed Package)

Collect the account ID, status, type, target value, target date and name. Create a financial goal for the account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use FinServ Package Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Agentforce:

Agent Platform Builder permission set

To run Prompt Templates:

Execute Prompt Templates user permission

See [Common User Access for Standard Agent Actions](#).

 **Note** This is a Financial Services Cloud managed package feature.

Action Details

API Name	FinServPkgCreateFinancialGoal
Reference Action Type	Flow
Reference Action	FinServ Package Create Financial Goal
Does this action execute one or more prompt templates?	No
Required Setup	FinServ Package Financial Advisor Assistance

Financial Services | FinServ Package Create Life Event (FSC Managed Package)

Collect the account ID, name, date and type. Create a life event related to the account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use FinServ Package Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Agentforce:

Agent Platform Builder permission set

To run Prompt Templates:

Execute Prompt Templates user permission

See [Common User Access for Standard Agent Actions](#).

 **Note** This is a Financial Services Cloud managed package feature.

Action Details

API Name	FinServPkgCreateLifeEvent
Reference Action Type	Flow
Reference Action	FinServ Package Create Life Event

Does this action execute one or more prompt templates?	No
Required Setup	FinServ Package Financial Advisor Assistance

Financial Services | FinServ Package Extract Financial Goals (FSC Managed Package)

Extract financial goals from meeting notes. Identify financial goals, types, statuses, target values, and target dates for wealth management advisors.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use FinServ Package Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Agentforce:

Agent Platform Builder permission set

To run Prompt Templates:

Execute Prompt Templates user permission

See [Common User Access for Standard Agent Actions](#).

 **Note** This is a Financial Services Cloud managed package feature.

Action Details

API Name	FinServPkgExtractFinancialGoals
Reference Action Type	Prompt Template
Reference Action	FinServ Package Extract Financial Goals
Does this action execute one or more prompt templates?	Yes
Required Setup	FinServ Package Financial Advisor Assistance

Financial Services | FinServ Package Extract Life Events (FSC Managed Package)

Extract life events from meeting notes. Identify life events, types, and dates for wealth management advisors.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use FinServ Package Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Agentforce:

Agent Platform Builder permission set

PERMISSIONS NEEDED

To run Prompt Templates: Execute Prompt Templates user permission

See [Common User Access for Standard Agent Actions](#).

 **Note** This is a Financial Services Cloud managed package feature.

Action Details

API Name	FinServPkgExtractPersonLifeEvents
Reference Action Type	Prompt Template
Reference Action	FinServ Package Extract Person Life Events
Does this action execute one or more prompt templates?	Yes
Required Setup	FinServ Package Financial Advisor Assistance

Financial Services | FinServ Package Get Client Life Events (FSC Managed Package)

The Get Client Life Events action provides wealth advisors with a list of past and upcoming life events within Salesforce Financial Services Cloud.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud: Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

PERMISSIONS NEEDED

To use FinServ Package Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Agentforce:

Agent Platform Builder permission set

To run Prompt Templates:

Execute Prompt Templates user permission

See [Common User Access for Standard Agent Actions](#).

 **Note** This is a Financial Services Cloud managed package feature.

Action Details

API Name	FinServPkgGetClientLifeEvents
Reference Action Type	Flow
Reference Action	FinServ Package Get Client Life Events
Does this action execute one or more prompt templates?	No
Required Setup	FinServ Package Financial Advisor Assistance

Financial Services | FinServ Package Structure Financial Advisor Meeting Notes (FSC Managed Package)

Structure and organize meeting notes. Identify the key client details, needs, concerns, and next steps for a follow-up meeting.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

PERMISSIONS NEEDED

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use FinServ Package Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Agentforce:

Agent Platform Builder permission set

To run Prompt Templates:

Execute Prompt Templates user permission

See [Common User Access for Standard Agent Actions](#).

 **Note** This is a Financial Services Cloud managed package feature.

Action Details

API Name	FinServPkgStructureFinancialAdvisorMeetingNotes
Reference Action Type	Prompt Template
Reference Action	FinServ Package Structure Financial Advisor Meeting Notes
Does this action execute one or more prompt templates?	Yes
Required Setup	FinServ Package Financial Advisor Assistance

Financial Services | FinServ Package Summarize Financial Details (FSC Managed Package)

The Summarize Financial Details action provides wealth advisors with a real-time summary of a household and person account's financial profile within Salesforce Financial Services Cloud.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use FinServ Package Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Agentforce:

Agent Platform Builder permission set

To run Prompt Templates:

Execute Prompt Templates user permission

See [Common User Access for Standard Agent Actions](#).

 **Note** This is a Financial Services Cloud managed package feature.

Action Details

API Name	FinServPkgSummarizeFinancialAccountDetails
Reference Action Type	Prompt Template
Reference Action	FinServ Package Summarize Financial Details
Does this action execute one or more prompt templates?	Yes
Required Setup	FinServ Package Financial Advisor Assistance

Financial Services | FinServ Package Summarize Financial Goals (FSC Managed Package)

The Summarize Financial Goals action finds and retrieves financial goals records based on user input. This action provides a real-time summary of a household and person account's financial goals within Salesforce Financial Services Cloud.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use FinServ Package Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Agentforce:

Agent Platform Builder permission set

To run Prompt Templates:

Execute Prompt Templates user permission

See [Common User Access for Standard Agent Actions](#).



Note This is a Financial Services Cloud managed package feature.

Action Details

API Name	FinServPkgSummarizeFinancialGoals
Reference Action Type	Prompt Template

Reference Action	FinServ Package Summarize Financial Goals
Does this action execute one or more prompt templates?	Yes
Required Setup	FinServ Package Financial Advisor Assistance

Financial Services | FinServ Package Summarize Portfolio Performance (FSC Managed Package)

Prompt template. Provide wealth advisors with real-time summary of an account's financial profile within Salesforce Financial Services Cloud.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use FinServ Package Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Agentforce:

Agent Platform Builder permission set

To run Prompt Templates:

Execute Prompt Templates user permission

See [Common User Access for Standard Agent Actions](#).

 **Note** This is a Financial Services Cloud managed package feature.

Action Details

API Name	FinServPkgSummarizePortfolioPerformance
Reference Action Type	Prompt Template
Reference Action	FinServ Package Summarize Portfolio Performance
Does this action execute one or more prompt templates?	Yes
Required Setup	FinServ Package Financial Advisor Assistance

Financial Services | Get Card Details for Account

Retrieves the card details for a specific account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCardDetailsForAccount
Reference Action Type	Integration Procedure
Reference Action	FSC_GetCards
Does this action execute one or more prompt templates?	No

Financial Services | Get Card Settings

Gets the details of the preconfigured settings associated with the card selected by the customer to raise

a request.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCardSettings
Reference Action Type	Integration Procedure
Reference Action	FSCRtIServiceProcess_FetchCardControls
Does this action execute one or more prompt templates?	No

Financial Services | Get Client Life Events

The Get Client Life Events action provide wealth advisors with a list of past and upcoming life events within Salesforce Financial Services Cloud.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

PERMISSIONS NEEDED

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetClientLifeEvents
Reference Action Type	Flow
Reference Action	Standard FSC: Get Recent and Upcoming Events
Does this action execute one or more prompt templates?	No
Required Setup	Financial Advisor Assistance

Financial Services | Get Current Billing Cycle Details

Retrieves information related to the user's current billing cycle.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

[See Common User Access for Standard Agent Actions.](#)**Action Details**

API Name	GetCurrentBillingCycleDetails
Reference Action Type	Integration Procedure
Reference Action	FSCRtIChgBillCycl_FetchCreditCardBillingDetails
Does this action execute one or more prompt templates?	No

Financial Services | Get Account Addresses

Retrieves the address details associated with a specific account or financial account.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, and Unlimited** Editions**USER PERMISSIONS NEEDED**

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

[See Common User Access for Standard Agent Actions.](#)**Action Details**

API Name	GetAccountAddresses
Reference Action Type	Integration Procedure

Reference Action	FSC_GetAccountAddresses
Does this action execute one or more prompt templates?	No

Financial Services | Get Account Restraints

Retrieves the financial account restraints associated with a financial account or a person account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAccountRestraints
Reference Action Type	Integration Procedure
Reference Action	FSC_GetAccountRestraints
Does this action execute one or more prompt templates?	No

Financial Services | Get Enriched Details of Transactions

Retrieves and shows enriched merchant information, such as merchant's official name, logo, and URL for a specific transaction.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

[See Common User Access for Standard Agent Actions.](#)**Action Details**

API Name	GetEnrichedDetailsOfTransactions
Reference Action Type	Integration Procedure
Reference Action	FSCTransactionDisputeManagement_WrapperEnrich
Does this action execute one or more prompt templates?	No

Financial Services | Get Financial Account Balances

Retrieves the financial account balances associated with a specific financial account.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, and Unlimited** Editions**USER PERMISSIONS NEEDED**

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

[See Common User Access for Standard Agent Actions.](#)**Action Details**

API Name	GetFinancialAccountBalances
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Reference Action Type	Integration Procedure
Reference Action	FSC_GetFinancialAccountBalances
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- To work with Get Financial Account Balances agent action, users require Industry Service Excellence license.

Financial Services | Get Financial Accounts for an Account

Retrieves the information of all financial accounts associated with a specific account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetFinclAccountsForAnAcct
Reference Action Type	Integration Procedure
Reference Action	FSC_GetFA
Does this action execute one or more prompt templates?	No

Financial Services | Get Financial Account Transactions

Retrieves all transactions, including fee transactions, for a specific financial account. Displays a maximum

of 10 transactions in a single view.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetFinancialAccountTransactions
Reference Action Type	Integration Procedure
Reference Action	FSC_GetFinancialAccountTransactions
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- To work with Get Financial Account Transactions agent action, users require Industry Service Excellence license.
- The agent action retrieves the recent five transactions associated with a financial account.

Financial Services | Get Interactions By Date Range

Gets the ten most recent interaction records that are associated with the client account. Filters these interaction records to return only those that occur within a given date range.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Financial Services add-on or included in Agentforce 1 Financial Services Edition. Requires each user to

have the Agentforce for Financial Services add-on to access the action.

USER PERMISSIONS NEEDED

To get interactions by date range:

Access Banking Relationship Assistance

AND

Einstein for Financial Services

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetIntrctnByDateRange
Reference Action Type	Flow
Reference Action	Get Interactions By Date Range
Does this action execute one or more prompt templates?	No

Financial Services | Fetch Request Loan Payoff Statement Details

Retrieves the loan payoff statement for a selected financial account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetLoanPayoffDetails
Reference Action Type	Integration Procedure
Reference Action	RequestLoanPayoffStatement_GetLoanPayoffDetails
Does this action execute one or more prompt templates?	No

Financial Services | Get New Billing Cycle Details

Retrieves details of the new billing cycle.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetNewBillingCycleDetails
Reference Action Type	Integration Procedure
Reference Action	FSCRtIChgBillCycl_FetchCreditCardBillingDetails
Does this action execute one or more prompt templates?	No

Financial Services | Get Reason Code for Transactions

Retrieves the reason codes and the reason code names that describe the issue in the transactions being

disputed.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetReasonCodeForTransactions
Reference Action Type	Integration Procedure
Reference Action	FSCTxnDisputeMgmt_GetReasonCode
Does this action execute one or more prompt templates?	No

Financial Services | Get Reason SubCode for Transactions

Retrieves the reason subcodes and the reason subcode names that describe the issue in the transactions being disputed.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

USER PERMISSIONS NEEDED

FSC Service

[See Common User Access for Standard Agent Actions.](#)**Action Details**

API Name	GetReasonSubCodeForTransactions
Reference Action Type	Integration Procedure
Reference Action	FSCTxnDisputeMgmt_GetReasonSubCode
Does this action execute one or more prompt templates?	No

Financial Services | Get Topic Config

Retrieves the configuration of a topic.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, and Unlimited** Editions**USER PERMISSIONS NEEDED**

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

[See Common User Access for Standard Agent Actions.](#)**Action Details**

API Name	GetTopicConfig
Reference Action Type	Integration Procedure
Reference Action	Topic_Config
Does this action execute one or more prompt templates?	No

templates?	
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Financial Services | Get Transaction Dispute Questionnaire

Retrieves the assessment questionnaire based on reason code, reason subcode, and payment network for disputed transactions. Generates an assessment ID after the questionnaire is completed and updates the assessment record with the case details.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Service

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetTransactionDisputeQuestionnaire
Reference Action Type	Integration Procedure
Reference Action	FSCTxnDisputeMgmt_GetReqParamForQnr
Does this action execute one or more prompt templates?	No

Financial Services | Restructure Meeting Notes

Organizes raw meeting notes into key points, decisions, and action items for clear and easy tracking. Gathers recently modified opportunity records and account plan objective records associated with the account plan record for an account and summarizes the meeting highlights.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Financial Services add-on or included in Agentforce 1 Financial Services Edition. Requires each user to have the Agentforce for Financial Services add-on to access the action.

USER PERMISSIONS NEEDED

To restructure meeting notes:

Access Banking Relationship Assistance

AND

Einstein for Financial Services

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	RestructureMeetingNotes
Reference Action Type	Flow
Reference Action	Restructure Meeting Notes
Does this action execute one or more prompt templates?	Yes

Considerations

- Restructure Meeting Notes is a prompt template-based agent action. Admins can customize the prebuilt prompt template according to their business needs.

Financial Services | Review Asset Allocation

The Review Asset Allocation action provides wealth advisors with a comparison of an account's current portfolio asset allocation with their target allocation.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

PERMISSIONS NEEDED

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ReviewAllocation
Reference Action Type	Prompt Template
Reference Action	Summarize Target Allocation
Does this action execute one or more prompt templates?	Yes
Required Setup	Financial Advisor Assistance

Financial Services | Summarize Account Financial Details

The Summarize Account Financial Details action provides wealth advisors with real-time summary of an account's financial profile within Salesforce Financial Services Cloud.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeAccountFinancialDetails
Reference Action Type	Prompt Template
Reference Action	Client Profile Summary for Account
Does this action execute one or more prompt templates?	Yes
Required Setup	Financial Advisor Assistance

Financial Services | Summarize Account Record Alerts

Provide wealth advisors with a real-time summary of an account's record alerts within Salesforce Financial Services Cloud.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeAccountRecordAlerts
Reference Action Type	Prompt Template
Reference Action	Summarize Account Record Alerts
Does this action execute one or more prompt templates?	Yes
Required Setup	Financial Advisor Assistance

Financial Services | Summarize Agenda Drafts

Summarize agenda drafts for client meetings.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeAgendaDrafts
Reference Action Type	Prompt Template
Reference Action	Summarize Agenda Drafts
Does this action execute one or more prompt templates?	Yes

Required Setup	Financial Advisor Assistance
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Financial Services | Summarize Financial Plans and Goals

The Summarize Financial Plans and Goals action finds and retrieves financial plans and financial goals records based on user input and specific conditions such as field values. This action identifies the correct records and object.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeFinancialPlansAndGoals
Reference Action Type	Prompt Template

Reference Action	Client Financial Plans and Goals Progress
Does this action execute one or more prompt templates?	Yes
Required Setup	Financial Advisor Assistance

Financial Services | Structure Financial Advisor Meeting Note

Structure and organize meeting notes. Identify the key client details, needs, concerns, and next steps for a follow-up meeting.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

[See Common User Access for Standard Agent Actions.](#)

Action Details

API Name	StructureFinancialAdvisorMeetingNotes
Reference Action Type	Prompt Template
Reference Action	Structure Financial Advisor Meeting Notes
Does this action execute one or more prompt templates?	Yes
Required Setup	Financial Advisor Assistance

Financial Services | Summarize Household Financial Details

The Summarize Household Financial Details action provides wealth advisors with a real-time summary of a household's financial profile within Salesforce Financial Services Cloud.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:

Financial Account Management Standard Objects setting

PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeHouseholdFinancialDetails
Reference Action Type	Prompt Template
Reference Action	Client Profile Summary for Household
Does this action execute one or more prompt templates?	Yes
Required Setup	Financial Advisor Assistance

Financial Services | Summarize Portfolio Performance

The Summarize Portfolio Performance action provides wealth advisors with a summary of an account's portfolio performance within Salesforce Financial Services Cloud.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Financial Advisor Assistance:

Einstein for Financial Services user permission

PERMISSIONS NEEDED

AND

Financial Advisor Assistance setting

To use Financial Account Management standard objects:
Financial Account Management Standard Objects setting

[See Common User Access for Standard Agent Actions.](#)

Action Details

API Name	SummarizePortfolioPerformance
Reference Action Type	Prompt Template
Reference Action	Gain and Loss Summary for Securities Holdings
Does this action execute one or more prompt templates?	Yes
Required Setup	Financial Advisor Assistance

Fundraising | Create Party Philanthropic Research Profile

Creates a party philanthropic research profile record.

REQUIRED EDITIONS

Available in: Lightning Experience

Education Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

Nonprofit Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the Agentforce for Nonprofit add-on to access the action.

USER PERMISSIONS NEEDED

To use Agentforce: [Agentforce for Education Cloud](#)

[See Common User Access for Standard Agent Actions.](#)

Action Details

API Name	CreatePartyPhilRsrchPrfl
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Fundraising | Create Philanthropic Assessment

Generates an assessment for a party philanthropic record.

REQUIRED EDITIONS

Available in: Lightning Experience

Education Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

Nonprofit Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the Agentforce for Nonprofit add-on to access the action.

USER PERMISSIONS NEEDED

To use Agentforce: Agentforce for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreatePhilanthropicAssessment
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Fundraising | Get Research Profile Canvas Layout

Generates the party philanthropic research profile canvas layout based on the party philanthropic research profile.

REQUIRED EDITIONS

Available in: Lightning Experience

Education Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

Nonprofit Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the Agentforce for Nonprofit add-on to access the action.

USER PERMISSIONS NEEDED

To use Agentforce: Agentforce for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetRsrchPrflCanvasLayout
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Fundraising | Summarize Philanthropic Milestones

Summarizes the philanthropic milestones related to an account.

REQUIRED EDITIONS

Available in: Lightning Experience

Education Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

Nonprofit Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the Agentforce for Nonprofit add-on to access the action.

USER PERMISSIONS NEEDED

To use Agentforce: Agentforce for Education Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizePhilanthropicMilestones
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Fundraising | Summarize Wealth Capacity

Summarizes the wealth capacity of a prospect.

REQUIRED EDITIONS

Available in: Lightning Experience

Education Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

Nonprofit Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the Agentforce for Nonprofit add-on to access the action.

USER PERMISSIONS NEEDED

To use Agentforce:	Agentforce for Education Cloud
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See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeWealthCapacity
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Fundraising | Close Gift Commitment

Closes a gift commitment by updating the status of all unpaid and failed transactions to Closed. Returns a confirmation that the gift commitment will be closed on the specified date.

REQUIRED EDITIONS

Available in: Lightning Experience

Education Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

Nonprofit Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the Agentforce for Nonprofit add-on to access the action.

USER PERMISSIONS NEEDED

To use the Donor Support Agent in Experience Cloud:

FundraisingExperienceCloud

AND

Manage Donations with Agentforce in Experience Cloud

See [Common User Access for Standard Agent Actions](#).



Example

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

Action Details

API Name	CloseGiftCommitment
Reference Action	Invocable Action
Does this action execute one or more prompt templates?	No

Fundraising | Manage Recurring Gift Commitment

Pauses, resumes, or updates the amount on a recurring gift commitment. Returns a confirmation that the requested action was successful or encountered an error.

REQUIRED EDITIONS



Example



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

Available in: Lightning Experience

Education Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Education add-on or included in Agentforce 1 Education Edition. Requires each user to have the Agentforce for Education add-on to access the action.

Nonprofit Cloud: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the Agentforce for Nonprofit add-on to access the action.

USER PERMISSIONS NEEDED

To use the Donor Support Agent in Experience Cloud:

FundraisingExperienceCloud

AND

Manage Donations with Agentforce in Experience Cloud

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ManageRecurringGiftCommitment
Reference Action	Invocable Action
Does this action execute one or more prompt templates?	No

Health | Classify Disease Surveillance Cases

Suggests a classification for a disease investigation case as Confirmed, Suspected, or Probable based on the lab findings and the criteria outlined in the disease definition.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud add-on license

USER PERMISSIONS NEEDED

To use this action:

Access Case Classification Assistive Agent

AND

Case Classification AI Assistive Agent permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).



Note The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	DiseaseSurveillanceCaseClsfn
Reference Action Type	Prompt Template
Reference Action	Classify Case (ClassifyCase)
Does this action run one or more prompt templates?	Yes
Required Setup	Agentforce for Public Health

Classify Disease Surveillance Cases and Prompt Templates

This action uses the Classify Case prompt template to classify an infectious disease case.

Considerations

This action uses a Large Language Model to suggest a case classification. We provide explanations and sources to support the model's response where possible but the suggestion must always be reviewed by a human to ensure accuracy.

Health | Execute Generic EMR Request

Sends FHIR data to an external FHIR server.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).

 **Note** The agent uses public FHIR APIs to retrieve patient data in real time, including demographic data, clinical information such as prescriptions, lab results, health conditions, procedures, referrals, and care plans, and administrative data such as visit encounters and coverage from any certified EMR such as Epic, Oracle Cerner, and AthenaHealth. Data retrieval has been tested in the publicly available sandbox environments of these EMRs. The agent leverages a pre-packaged [MuleSoft API](#) to interact with these FHIR endpoints. To enable the integration, provide the EMR-specific FHIR base URLs and credentials outlined on the [MuleSoft setup](#) page.

 **Note** The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	GenericRequestEmr
Reference Action Type	Standard Action
Does this action run one or more prompt templates?	No
Required Setup	Agentforce for Provider Contact Center

Health | Extract Patient Home Visit Requirements

Gets the transcript of the patient's voice call with the home health agency and extracts details about home visit requirements, benefits, and quotes. Drafts a rich-text summary of the patient's home healthcare requirements and creates a JSON response with the patient's quote and benefit information.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Agentforce for Health add-on or included in Agentforce 1 Health Edition. Requires each user to have the Agentforce for Health add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions for Home Health:

Context Service Runtime

AND

Data Cloud User

AND

Health Cloud Foundation

AND

Home Health Assistive Agent

AND

Home Health Quote

AND

USER PERMISSIONS NEEDED

Prompt Template User

AND

Service Cloud User

AND

Service Cloud Voice

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ExtractPatientHomeVisitRqmt
Reference Action Type	Prompt Template
Reference Action	ExtractPatientHomeVisitRqmt
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Home Health

Extract Patient Home Visit Requirements and Prompt Templates

This agent action calls the Extract Patient Home Visit Requirements prompt template for extracting the patient's home visit requirement details such as benefits and quotes from a voice call transcript. The prompt template drafts a summary of the home visit requirements and creates a JSON response with the patient's quote and benefit information. The prompt template uses the Get Transcript for Conversation invocable action to get the transcript for the voice call and uses the Get Home Healthcare Quote and Benefit Details flow to get data on the quotes and benefits.

Guidelines and Considerations

The user interface of this product is available in English only and may not be fully supported in other languages.

Health | Fetch Individual Record ID

Retrieves the Individual ID from Data 360 by using member information. Accepts either a member ID or the member's first name, last name, and date of birth.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).



Note The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	FetchIndividualRecordId
Reference Action Type	Standard Action
Does this action run one or more prompt templates?	No
Required Setup	Set Up Agentforce for Payer Contact Center

Health | Find Claim

Retrieves claim records for a member from an external zero copy system based on the member number, service start date, and service end date. Optionally, filters by claim status and provider name. Returns up to the 5 most recent claims, sorted by claim creation date.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).



Note The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	FindClaim
Reference Action Type	Standard Action
Does this action run one or more prompt templates?	No
Required Setup	Set Up Agentforce for Payer Contact Center

Health | Find Matching Providers

Find healthcare providers based on the search filters and return matching providers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud.

USER PERMISSIONS NEEDED

To use the Provider Matching topics and actions Provider Matching Access for AI Autonomous Agents permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindProviders
Reference Action Type	Standard Action
Reference Action	findProviders
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Provider Matching

Guidelines and Considerations

The user interface of this product is available in English only and may not be fully supported in other languages.

Health | Find Providers Info

Gets the available specialties and plan types for healthcare providers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud.

USER PERMISSIONS NEEDED

To use the Provider Matching topics and actions Provider Matching Access for AI Autonomous Agents permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindProviderInfo
Reference Action Type	Standard Action
Reference Action	findProvidersInfo
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Provider Matching

Guidelines and Considerations

The user interface of this product is available in English only and may not be fully supported in other languages.

Health | Find Specific Member Coverage

Extracts specific member coverage details based on user context and requests. Queries member coverage data and returns only the specific information requested by the user.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

 **Note** The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	FindSpecificMemberCoverage
Reference Action Type	Standard Action
Does this action run one or more prompt templates?	No
Required Setup	Set Up Agentforce for Payer Contact Center

Health | Generate EMR Data Fetch Payload

Generates the input payload required to get Fast Healthcare Interoperability Resources (FHIR) data from Electronic Medical Record (EMR) systems.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

-  **Note** The agent uses public FHIR APIs to retrieve patient data in real time, including demographic data, clinical information such as prescriptions, lab results, health conditions, procedures, referrals, and care plans, and administrative data such as visit encounters and coverage from any certified EMR such as Epic, Oracle Cerner, and AthenaHealth. Data retrieval has been tested in the publicly available sandbox environments of these EMRs. The agent leverages a pre-packaged [MuleSoft API](#) to interact with these FHIR endpoints. To enable the integration, provide the EMR-specific FHIR base URLs and credentials outlined on the [MuleSoft setup](#) page.
-  **Note** The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	GenerateEMRDataFetchPayload
Reference Action Type	Prompt Template
Reference Action	Generate EMR Data Fetch Payload (GenerateEMRDataFetchPayload)
Does this action run one or more prompt templates?	Yes
Required Setup	Agentforce for Provider Contact Center

Generate EMR Data Fetch Payload and Prompt Templates

This action uses the Generate EMR Data Fetch Payload prompt template to generate the request payload in JSON format for fetching FHIR resources as per the user's request.

Health | Generate FHIR Payload

Generates the FHIR input payload required to register a patient in the Electronic Health Record (EHR) system.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).

-  **Note** The agent uses public FHIR APIs to retrieve patient data in real time, including demographic data, clinical information such as prescriptions, lab results, health conditions, procedures, referrals, and care plans, and administrative data such as visit encounters and coverage from any certified EMR such as Epic, Oracle Cerner, and AthenaHealth. Data retrieval has been tested in the publicly available sandbox environments of these EMRs. The agent leverages a pre-packaged [MuleSoft API](#) to interact with these FHIR endpoints. To enable the integration, provide the EMR-specific FHIR base URLs and credentials outlined on the [MuleSoft setup](#) page.
-  **Note** The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	GenerateFhirPayload
Reference Action Type	Prompt Template
Reference Action	Generate FHIR Payload (GenerateFhirPayload)
Does this action run one or more prompt templates?	Yes
Required Setup	Set Up Agentforce for Provider Contact Center

Generate FHIR Payload and Prompt Templates

This action uses the Generate FHIR Payload prompt template to generate the request payload in JSON format to process the user's request.

Health | Generate FHIR Payload for Eligibility and Benefit Verification

Generates the FHIR input payload for eligibility and benefit verification request.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud Add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).

- Note** The agent uses public FHIR APIs to verify patient eligibility and benefits for healthcare providers from any certified EMR such as Epic, Oracle Cerner, and AthenaHealth. Data retrieval has been tested in the publicly available sandbox environments of these EMRs. The agent leverages a pre-packaged [MuleSoft API](#) to interact with these FHIR endpoints. To enable the integration, provide the EMR-specific FHIR base URLs and credentials outlined on the [MuleSoft setup](#) page.
- Note** The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	GenerateEligBnftVerfFHIRPayload
Reference Action Type	Prompt Template
Reference Action	Generate FHIR Payload for Eligibility and Benefit Verification (GenerateEligBnftVerfFHIRPayload)

Does this action run one or more prompt templates?	Yes
Required Setup	Set Up Agentforce for Provider Contact Center

Generate FHIR Payload for Eligibility and Benefit Verification and Prompt Templates

This action uses the Generate FHIR Payload for Eligibility and Benefit Verification prompt template to generate the request payload in JSON format to process the user's request.

Health | Generate Patch FHIR Payload

Generates the Patch FHIR input payload required to update resources, such as Patient and Medication Request.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).

-  **Note** The agent uses public FHIR APIs to retrieve patient data in real time, including demographic data, clinical information such as prescriptions, lab results, health conditions, procedures, referrals, and care plans, and administrative data such as visit encounters and coverage from any certified EMR such as Epic, Oracle Cerner, and AthenaHealth. Data retrieval has been tested in the publicly

available sandbox environments of these EMRs. The agent leverages a pre-packaged [MuleSoft API](#) to interact with these FHIR endpoints. To enable the integration, provide the EMR-specific FHIR base URLs and credentials outlined on the [MuleSoft setup](#) page.

-  **Note** The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	GeneratePatchFhirPayload
Reference Action Type	Prompt Template
Reference Action	Generate FHIR Payload For Patch Request (GeneratePatchFhirPayload)
Does this action run one or more prompt templates?	Yes
Required Setup	Agentforce for Provider Contact Center

Generate Patch FHIR Payload and Prompt Templates

This action uses the Generate FHIR Payload For Patch Request prompt template to generate the PATCH request payload in JSON format to process the user's request.

Health | Get Claim Summary

Provides a summary of a claim. For bulk claim queries, shows a snapshot of up to the 5 most recent claims.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission

USER PERMISSIONS NEEDED

set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).



Note The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	GetClaimSummary
Reference Action Type	Standard Action
Does this action run one or more prompt templates?	No
Required Setup	Set Up Agentforce for Payer Contact Center

Health | Get Input for Eligibility and Benefit Verification

Gets the eligibility and benefit verification request input ready, including payerIdentifier, providerIdentifier, and facilityIdentifier to retrieve the member plan details based on the provided payer and service information.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud Add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

USER PERMISSIONS NEEDED

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).

-  **Note** The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	GetEligibilityBenefitVerfInput
Reference Action Type	Standard Action
Does this action run one or more prompt templates?	No
Required Setup	Set Up Agentforce for Provider Contact Center

Health | Get Member Coverage Summary

Retrieves and summarizes member coverage information. Queries member coverage and provides a comprehensive summary of the member's coverage.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).



Note The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	GetMemberCoverageSummary
Reference Action Type	Standard Action
Does this action run one or more prompt templates?	No
Required Setup	Set Up Agentforce for Payer Contact Center

Health | Get Patient Data from EMR

Gets the clinical, demographic, and administrative patient data from the Electronic Medical Record (EMR) system.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud Add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).

-  **Note** The agent uses public FHIR APIs to retrieve patient data in real time, including demographic data, clinical information such as prescriptions, lab results, health conditions, procedures, referrals, and care plans, and administrative data such as visit encounters and coverage from any certified EMR such as Epic, Oracle Cerner, and AthenaHealth. Data retrieval has been tested in the publicly available sandbox environments of these EMRs. The agent leverages a pre-packaged [MuleSoft API](#) to interact with these FHIR endpoints. To enable the integration, provide the EMR-specific FHIR base URLs and credentials outlined on the [MuleSoft setup](#) page.
-  **Note** The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	GetPatientDataFrEmr
Reference Action Type	Prompt Template
Reference Action	Generate FHIR Payload (GenerateFhirPayload)
Does this action run one or more prompt templates?	Yes
Required Setup	Set Up Agentforce for Provider Contact Center

Get Patient Data from EMR and Prompt Templates

This action uses the Generate FHIR Payload prompt template to generate the request payload in JSON format to process the user's request.

Health | Get Patient Member Plans

Gets the MemberPlans of the patient from Salesforce. If no results are returned from this action, then invoke the GetPatientDataFrEmr action with the patient's details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud Add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).

-  **Note** The agent uses public FHIR APIs to verify patient eligibility and benefits for healthcare providers from any certified EMR such as Epic, Oracle Cerner, and AthenaHealth. Data retrieval has been tested in the publicly available sandbox environments of these EMRs. The agent leverages a pre-packaged [MuleSoft API](#) to interact with these FHIR endpoints. To enable the integration, provide the EMR-specific FHIR base URLs and credentials outlined on the [MuleSoft setup](#) page.
-  **Note** The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	GetPatientMemberPlans
Reference Action Type	Standard Action
Does this action run one or more prompt	No

templates?	
Required Setup	Set Up Agentforce for Provider Contact Center

Health | Register a Patient in EMR

Registers a patient in the Electronic Medical Record (EMR) System.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud Add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).

-  **Note** The agent uses public FHIR APIs to retrieve patient data in real time, including demographic data, clinical information such as prescriptions, lab results, health conditions, procedures, referrals, and care plans, and administrative data such as visit encounters and coverage from any certified EMR such as Epic, Oracle Cerner, and AthenaHealth. Data retrieval has been tested in the publicly available sandbox environments of these EMRs. The agent leverages a pre-packaged [MuleSoft API](#) to interact with these FHIR endpoints. To enable the integration, provide the EMR-specific FHIR base URLs and credentials outlined on the [MuleSoft setup](#) page.
-  **Note** The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	RegisterAPatientInEmr
Reference Action Type	Prompt Template
Reference Action	Generate FHIR Payload (GenerateFhirPayload)
Does this action run one or more prompt templates?	Yes
Required Setup	Set Up Agentforce for Provider Contact Center

Register a Patient in EMR and Prompt Templates

This action uses the Generate FHIR Payload prompt template to generate the request payload in JSON format to process the user's request.

Health | Send Eligibility and Benefit Verification Request

Sends the eligibility and benefit verification request to the external FHIR server.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud Add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Contact Center AI Assistive Agent

AND

Contact Center Agent for Health Cloud permission set

AND

Prompt Template User

AND

Data Cloud User

[See Common User Access for Standard Agent Actions.](#)

- Note** The agent uses public FHIR APIs to verify patient eligibility and benefits for healthcare providers from any certified EMR such as Epic, Oracle Cerner, and AthenaHealth. Data retrieval has been tested in the publicly available sandbox environments of these EMRs. The agent leverages a pre-packaged [MuleSoft API](#) to interact with these FHIR endpoints. To enable the integration, provide the EMR-specific FHIR base URLs and credentials outlined on the [MuleSoft setup](#) page.
- Note** The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	SendEligBnftVerfRequest
Reference Action Type	Standard Action
Does this action run one or more prompt templates?	No
Required Setup	Set Up Agentforce for Provider Contact Center

Health | Summarize Disease Investigation Details

Summarizes a disease investigation, including reported symptoms and onset date, possible exposure sources such as travel history and recent contacts, and any relevant inspection findings or other investigative details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Disease Surveillance AI Assistive Agent

AND

Disease Surveillance AI Assistive Agent permission set

AND

Prompt Template User

USER PERMISSIONS NEEDED

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).

 **Note** The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	DiseaseInvestigationSummary
Reference Action Type	Prompt Template
Reference Action	Summarize Disease Investigation Details (SummarizeDiseaseIstgnDtl)
Does this action run one or more prompt templates?	Yes
Required Setup	Agentforce for Public Health

Summarize Disease Investigation Details and Prompt Templates

This action uses the Summarize Disease Investigation Details prompt template to generate a concise, structured summary of a disease investigation.

Considerations

This action uses a Large Language Model to summarize a disease investigation. We provide explanations and sources to support the model's response where possible, but the summary must always be reviewed by a human to ensure accuracy.

Health | Summarize Disease Surveillance Case

Summarizes a patient's case, including investigations, lab results, risk assessments, symptom onset, hospitalization status, and any interventions given.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Health Cloud add-on license

USER PERMISSIONS NEEDED

To use this action:

Use Disease Surveillance AI Assistive Agent

AND

Disease Surveillance AI Assistive Agent permission set

AND

Prompt Template User

AND

Data Cloud User

See [Common User Access for Standard Agent Actions](#).



Note The user interface of this product is available only in English and may not be fully supported in other languages.

Action Details

API Name	DiseaseSurveillanceCaseSummary
Reference Action Type	Prompt Template
Reference Action	Summarize a Case (SummarizeCase)
Does this action run one or more prompt templates?	Yes
Required Setup	Agentforce for Public Health

Summarize Disease Surveillance Case and Prompt Templates

This action uses the Summarize a Case prompt template to generate a concise, structured summary of a Case.

Considerations

This action uses a Large Language Model to summarize a case. We provide explanations and sources to

support the model's response where possible, but the summary must always be reviewed by a human to ensure accuracy.

Health | Summarize Patient Healthcare Details

Creates a rich-text summary of a patient's healthcare details based on the patient name. The summary includes patient information such as opportunities, clinical service requests, and member plans.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Health add-on or included in Agentforce 1 Health Edition. Requires each user to have the Agentforce for Health add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions for patient healthcare summaries:

Care Plans Access

AND

Context Service Runtime

AND

Data Cloud User

AND

Health Cloud Foundation

AND

Health Assistive Agent

AND

Prompt Template User

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizePatientHlthcrDetails
Reference Action Type	Prompt Template

Reference Action	SummarizePatientHealthcareDetails
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Patient Healthcare

Summarize Patient Healthcare Details and Prompt Templates

This agent action calls the Summarize Patient Healthcare Details prompt template for creating a summary of patient healthcare information. The prompt template uses the PatientHistory context definition to get the data for patient history and uses the Get Patient Health Information flow to get data for patient healthcare summary.

Guidelines and Considerations

The user interface of this product is available in English only and may not be fully supported in other languages.

Health | Summarize Patient Home Healthcare Details

Creates a rich-text summary of a patient's home healthcare details based on the patient name. The summary includes patient information such as opportunities, clinical service requests, and member plans.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Health add-on or included in Agentforce 1 Health Edition. Requires each user to have the Agentforce for Health add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions for Home Health:

Context Service Runtime

AND

Data Cloud User

AND

Health Cloud Foundation

USER PERMISSIONS NEEDED

AND

Home Health Assistive Agent

AND

Home Health Quote

AND

Prompt Template User

AND

Service Cloud User

AND

Service Cloud Voice

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizePatientHomeHlthcrDtl
Reference Action Type	Prompt Template
Reference Action	SummarizePatientHomeHealthcareDetails
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Home Health

Summarize Patient Home Healthcare Details and Prompt Templates

This agent action calls the Summarize Patient Home Healthcare Details prompt template for creating a summary of patient home healthcare details. The prompt template uses the PatientHistory context definition to get the data for patient history and uses the Get Patient Healthcare Details flow to get data for patient home healthcare summary.

Guidelines and Considerations

The user interface of this product is available in English only and may not be fully supported in other

languages.

Insurance | Fetch Asset

Retrieves a list of assets linked to the insurance policy.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Insurance Service Assistance:

Einstein for Financial Services user permission

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FetchAsset
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Financial Services: Insurance Service Assistance

Guidelines and Considerations

See [Considerations for Agentforce for Financial Services: Insurance Service Assistance](#)

Insurance | Fetch Policies

Retrieves a list of active insurance policies for proof of insurance requests.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Insurance Service Assistance:

Einstein for Financial Services user permission

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FetchPolicies
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Financial Services: Insurance Service Assistance

Guidelines and Considerations

See [Considerations for Agentforce for Financial Services: Insurance Service Assistance](#)

Insurance | Fetch Participant

Retrieves a list of insurance policy participants related to an asset.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Insurance Service Assistance:

Einstein for Financial Services user permission

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FetchParticipant
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Financial Services: Insurance Service Assistance

Guidelines and Considerations

See [Considerations for Agentforce for Financial Services: Insurance Service Assistance](#)

Insurance | Generate Proof of Insurance

Generates a proof of insurance document and attaches it to a policy.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Insurance Service Assistance:

Einstein for Financial Services user permission

To generate proof of insurance documents:

Industry Service Excellence

AND

Omnistudio User or OmniStudio Admin

DocGen User or DocGen Designer

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GenerateProofOfInsurance
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Financial Services: Insurance Service Assistance

Guidelines and Considerations

See [Considerations for Agentforce for Financial Services: Insurance Service Assistance](#)

Insurance | Get Insurance Quote Details

Retrieve details about a quote.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Insurance Service Assistance:

Einstein for Financial Services user permission

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetInsuranceQuoteDetails
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Financial Services: Insurance Service Assistance

Guidelines and Considerations

See [Considerations for Agentforce for Financial Services: Insurance Service Assistance](#)

Insurance | Summarize Insurance Policyholder

Retrieves a summary of a policyholder account along with its policy, participant, asset, coverage and claim details.

REQUIRED EDITIONS

Available in: Lightning Experience

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

PERMISSIONS NEEDED

To use Financial Services Cloud:

Financial Services Cloud Extension

OR

FSC Foundation

OR

FSC Sales

OR

FSC Service

To use Insurance Service Assistance:

Einstein for Financial Services user permission

See [Common User Access for Standard Agent Actions](#).

USER PERMISSIONS NEEDED

To execute actions in Agentforce: **Insurance Service Assistance Agent**

Action Details

API Name	SummarizeInsurancePolicyholder
Reference Action Type	Flow
Does this action execute one or more prompt templates?	Yes
Required Setup	Agentforce for Financial Services: Insurance Service Assistance

SummarizeInsurancePolicyholder and Prompt Templates

Creates a summary of a policyholder account along with its policy, participant, asset, coverage and claim details.

Guidelines and Considerations

See [Considerations for Agentforce for Financial Services: Insurance Service Assistance](#)

Inventory Management | Create Product Request

Create product requests for specified products and quantities from the given location to address shortage scenarios. This action supports the creation of product requests to streamline inventory management.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateProductRequest
Action Type	Standard
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Inventory Management | Get Search Criteria and Results

Finds the search configuration and matching search criteria based on the user input and returns the search results.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetSearchCriteriaAndResults
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Inventory Management | Summarize Inventory Details

Summarizes the available inventory for an item at a specific location, including details such as quantity and stock status. The action uses inputs such as product name, inventory location name, and stock status, where stock status values can be shortage, excess, or optimal. Users can provide one or a combination of these inputs to refine the summary.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

See Common User Access for Standard Agent Actions .	
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Action Details

API Name	SummarizeInventoryDetails
Action Type	Standard
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Life Sciences | Add Site and Investigator to Study

The Add Site and Investigator to Study action creates a care program site record from a healthcare facility, healthcare provider, and research study record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise and Unlimited** Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and

Einstein GPT Prompt Builder add-on licenses.

PERMISSIONS NEEDED

To use Life Sciences Cloud:

Healthcloud Starter

To use Site Management:

Healthcloud Starter

AND

Study Manager for Site Management

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	AddSiteAndInvestigatorToStudy
Reference Action Type	Flow
Reference Action	CreateCareProgramSites
Does this action execute one or more prompt templates?	No
Required Setup	Site Management

Life Sciences | Add Sites Search Results to Study

The Add Sites Search Results to Study action calls the AddSitesToStudy flow to create care program site records from the care site investigator searchable field records and the research study records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

PERMISSIONS NEEDED

To use Life Sciences Cloud:

Healthcloud Starter

PERMISSIONS NEEDED

To use Site Management:

Healthcloud Starter

AND

Study Manager for Site Management

See [Common User Access for Standard Agent Actions](#).**Action Details**

API Name	AddSitesSearchResultsToStudy
Reference Action Type	Flow
Reference Action	CreateCareProgramSites
Does this action execute one or more prompt templates?	No
Required Setup	Site Management

Life Sciences | Generate Healthcare Provider Summary

The Generate Healthcare Provider Summary action provides contextual summaries of the latest changes, interactions, and insights related to healthcare provider accounts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Life Sciences add-on or included in Agentforce 1 Life Sciences Edition. Requires each user to have the Agentforce for Life Sciences add-on to access the action.

User Permissions Needed	
To execute actions for Account Summarization:	Life Sciences Key Account Management OR Life Sciences Field Medical OR

User Permissions Needed	
	Life Sciences Field Sales Representative AND Life Sciences Core Prompt Template User Health Cloud Starter Access Life Sciences Customer Engagement Agentforce
To run flows associated with agent actions:	App Permission: Run Flows OR Grant access to individual flows
See Common User Access for Standard Agent Actions .	

Action Details

API Name	GenerateHealthcareProviderSum
Reference Action Type	Flow
Reference Action	GenerateAccountSum
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Account Summarization

Guidelines and Considerations

The user interface of this product is available in English only and may not be fully supported in other languages.

Life Sciences | Get Omniscript IDs From Research Study

The Get Omniscript IDs From Research Study action calls the OmniFrmRschStdy flow to get all the assessments associated with the care program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

PERMISSIONS NEEDED

To use Life Sciences Cloud:

Healthcloud Starter

To use Site Management:

Healthcloud Starter

AND

Study Manager for Site Management

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetOmniscriptIdsFromRsrchStudy
Reference Action Type	Prompt
Reference Action	OmniFrmRschStdy
Does this action execute one or more prompt templates?	No
Required Setup	Site Management

Life Sciences | Get Site Search Filters for Research Study

The Get Site Search Filters for Research Study gets the site search filters for a research study using the research study record ID as the input.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

PERMISSIONS NEEDED

To use Life Sciences Cloud:

Healthcloud Starter

To use Site Management:

Healthcloud Starter

AND

Study Manager for Site Management

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetSiteSearchFilters
Reference Action Type	Prompt
Reference Action	generateSiteSearchFilters
Does this action execute one or more prompt templates?	Yes
Required Setup	Site Management

Get Site Search Filters for Research Study and Prompt Templates

This action uses the Generate Site Search Filters prompt template to get the site search filters for a research study.

Life Sciences | Go to Care Program Sites

The Go to Care Program Sites action is a follow-up action to navigate to the care program sites after they're added to a research study.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

PERMISSIONS NEEDED

To use Life Sciences Cloud:

Healthcloud Starter

To use Site Management:

Healthcloud Starter

AND

Study Manager for Site Management

See [Common User Access for Standard Agent Actions](#).**Action Details**

API Name	GoToCareProgramSites
Reference Action Type	Flow
Reference Action	GetCareProgramSites
Does this action execute one or more prompt templates?	No
Required Setup	Site Management

Life Sciences | Send Site Feasibility Assessments

The Send Site Feasibility Assessments action sends the feasibility assessments to the sites using careProgramSiteIds, omniscriptId, and expiryDate as the input.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

PERMISSIONS NEEDED

To use Life Sciences Cloud:

Healthcloud Starter

To use Site Management:

Healthcloud Starter

AND

PERMISSIONS NEEDED

Study Manager for Site Management

[See Common User Access for Standard Agent Actions.](#)**Action Details**

API Name	SendSiteFeasibilityAses
Reference Action Type	Flow
Reference Action	blk_assmt_envlp_snd_eml
Does this action execute one or more prompt templates?	No
Required Setup	Site Management

Life Sciences | Summarize Investigator

The Summarize Investigator action summarizes the healthcare provider record for a specific research study.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

PERMISSIONS NEEDED

To use Life Sciences Cloud:

Healthcloud Starter

To use Site Management:

Healthcloud Starter

AND

Study Manager for Site Management

To summarize investigator:

Life Sciences Site Management Summarization

[See Common User Access for Standard Agent Actions.](#)

Action Details

API Name	SummarizeInvestigator
Reference Action Type	Flow
Reference Action	sumrzeSiteInv
Does this action execute one or more prompt templates?	Yes
Required Setup	Site Management

Summarize Investigator and Prompt Templates

This action uses the Summarize Site or Investigator prompt template to summarize the healthcare provider record for a specific research study.

Life Sciences | Summarize Patient Response for Benefits Reverification

Analyzes the patient's response for benefit reverification email and summarizes the changes to the benefits verification request, including personal, drug, healthcare provider, pharmacy, and insurance details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses

USER PERMISSIONS NEEDED

To run this action:

Manage Pharmacy Benefits Verification permission set

AND

Access Patient Support Programs as a Program Lead permission set

AND

USER PERMISSIONS NEEDED

Context Service Runtime permission set

AND

Access Patient Support Programs using Einstein permission set

AND

Prompt Template User permission set

AND

Health Cloud Starter permission set (for Life Sciences Cloud) or Health Cloud Foundation permission set (for Health Cloud)

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizePtntRespForBenReVerf
Reference Action Type	Flow
Reference Action	Summarize Patient Response (SummarizePatientResp)
Does this action execute one or more prompt templates?	Yes
Required Setup	Set Up Agentforce for Pharmacy Benefits Reverification

Summarize Patient Response for Benefits Reverification and Prompt Template

This agent action uses the Summarize Patient Response flow, which uses the Summarize Patient Response prompt template of type Objects Summary to generate a summary of patient's updated personal and healthcare details.

 **Note** This agent action is also available for Health Cloud.

Life Sciences | Summarize Site

The Summarize Site action summarizes the details of a healthcare facility, such as its location, facilities, specialties, resources, accreditations, performance, and quality compliance in the context of a research study.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

PERMISSIONS NEEDED

To use Life Sciences Cloud: Healthcloud Starter

To use Site Management: Healthcloud Starter

AND

Study Manager for Site Management

To summarize site: Life Sciences Site Management Summarization

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeSite
Reference Action Type	Flow
Reference Action	sumrzesiteInv
Does this action execute one or more prompt templates?	Yes
Required Setup	Site Management

Summarize Site and Prompt Templates

This action uses the Summarize Site or Investigator prompt template to summarize the details of a healthcare facility in the context of a research study.

Loyalty Management | Add or Update Limit in Pricing Promotion

Gathers information about the limits that the marketing managers wants to add or update in a pricing promotion. The output includes details of the limits added or updated for the pricing promotion.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Agentforce, Loyalty Management, Salesforce Foundations, and Data Cloud.

USER PERMISSIONS NEEDED

To create or update promotions:

Manage Promotions with Global Promotions
Management permission set

AND

Manage Data Cloud Segments in Global
Promotions Management permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateUpdatePromotionLimitForPricingTemplate
Reference Action Type	Standard Action
Reference Action	Add or Update Limit in Pricing Promotion
Does this action execute one or more prompt templates?	No

Loyalty Management | Create or Update Pricing Promotion

Gathers information about the pricing promotion that the marketing managers wants to create or update. The output includes the details of the promotion that was created or updated.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Agentforce, Loyalty Management, Salesforce Foundations, and Data Cloud.

USER PERMISSIONS NEEDED

To create or update promotions:

Manage Promotions with Global Promotions
Management permission set

AND

Manage Data Cloud Segments in Global
Promotions Management permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateUpdatePromotionObjectForPricingTemplate
Reference Action Type	Standard Action
Reference Action	Create or Update Pricing Promotion
Does this action execute one or more prompt templates?	No

Loyalty Management | Create or Update Promotion using Accrual Promotion Template

Gathers information about the loyalty accrual promotion that the marketing manager wants to create or update. The output includes the details of the promotion that was created or updated.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Agentforce, Loyalty Management, Salesforce Foundations, and Data Cloud.

USER PERMISSIONS NEEDED

To create or update promotions:

Manage Data Cloud Segments in Global
Promotions Management permission set

AND

Manage Loyalty Promotions with Global
Promotions Management permission set

USER PERMISSIONS NEEDED

To generate emails: Manage Loyalty Promotions with Global Promotions Management permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateUpdatePromotionUsingAccrualTemplate
Reference Action Type	Standard Action
Reference Action	Create or Update Promotion using Accrual Promotion Template
Does this action execute one or more prompt templates?	No

Loyalty Management | Create or Update Promotion Using a Spend X Template

Gathers information about the promotion that the marketing manager wants to create or update for rewarding customers based on their order value. The output includes the details of the promotion that was created or updated.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Agentforce, Loyalty Management, Salesforce Foundations, and Data Cloud.

USER PERMISSIONS NEEDED

To create or update promotions: Manage Promotions with Global Promotions Management

AND

Manage Data Cloud Segments in Global Promotions Management

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateUpdatePromotionUsingSpendXTemplate
Reference Action Type	Standard Action
Reference Action	Create or Update Promotion using a Spend X Template
Does this action execute one or more prompt templates?	No

Loyalty Management | Generate Loyalty Promotion Email

Creates the subject and content of a draft launch email for a promotion.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Agentforce, Loyalty Management, Salesforce Foundations, and Data Cloud.

USER PERMISSIONS NEEDED

To generate emails:

Manage Loyalty Promotions with Global Promotions Management

AND

Manage Data Cloud Segments in Global Promotions Management

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	DraftEmailLoyaltyGlobalPromotion
Reference Action Type	Standard Action
Reference Action	Generate Loyalty Promotion Email
Does this action execute one or more prompt templates?	No

Manufacturing | Get Aggregate Sources for a Member

Fetches rebate aggregate sources for a member in a specified payout period.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAggregateSourcesForMember
Action Type	Standard
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Create Asset Appraisal

Creates an appraisal record for an asset and an associated appraisal item based on the customer's selected asset that they want to trade-in and opportunity context. The action captures the opportunity ID, the specific record ID of the customer's trade-in asset, and the asset's condition status.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreaAssetAppraisal
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

 **Note** This flow requires an opportunity ID as an input. Ensure that an active Opportunity is available in the conversation context (either created earlier in the chat or by the user initiating the agent from an Opportunity record page).

Manufacturing | Create Sales Agreements Bulk Update Request

Creates a bulk update request for sales agreements based on the input provided by the user.

REQUIRED EDITIONS

Available in: Lightning Experience

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

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	createSalesAgreementsBulkUpdateRequest
Action Type	Standard
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Manufacturing | Forecasts to Opportunities Filter Criteria

Creates the filter criteria based on the input provided by the user.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ForecastsToOpportunitiesFilterCriteria
Reference Action Type	API
Does this action execute one or more prompt templates?	No

Manufacturing | OpportunityJsonBuilder

Creates an object that contains the new opportunity details.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	OpportunityJsonBuilder
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Manufacturing | Create Opportunity with Products and Preferred Seller

Creates an opportunity, associated opportunity products, and opportunity preferred seller records for a customer based on inputs that define the core record identifiers and data collections for the flow, including the account, product, and preferred dealer IDs, alongside an Apex collection containing the pricebook mapping details required for opportunity creation. Captures the details of the newly generated records, including the opportunity's core attributes, the associated preferred seller record, and specific line-item data such as the opportunity ID, price book entry, product ID, quantity, and unit price.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreaOppAndPrefSell
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Create Product Request

Create product requests for specified products and quantities from the given location to address shortage scenarios. This action supports the creation of product requests to streamline inventory management.

REQUIRED EDITIONS

Available in: Lightning Experience

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

See [Common User Access for Standard Agent Actions](#)

Actions.

Action Details

API Name	CreateProductRequest
Action Type	Standard
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Manufacturing | Create Quote from Opportunity

Creates quotes and quote line items for an opportunity using its ID as an input and its associated opportunity products with a manual discount percentage.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateQuoteFromOppt
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Create Service Quote

Creates a comprehensive quote for specified products by evaluating requested quantities, selected parts, manual discounts, and applicable coverages for each item.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateSvcQuote
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Create Service Work Order

Creates a work order from a quote for specified products.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateServiceWorkOrder
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Create Visit

Create a visit based on user specified instructions and dates for a specific context, such as a sales agreement.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateVisitContextRecord
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No

Manufacturing | Get Aggregate Summary

Retrieves a rebate member product aggregate summary with status, quantities, rebate, and payout details.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAggregateSummary
Action Type	Standard
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Get Assets for a Customer

Gets a list of assets associated with an account.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAssetsForACustomer
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Get Asset Warranties

Gets the active asset warranties associated with an asset.

REQUIRED EDITIONS

Available in: Lightning Experience

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

Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAssetWarranties
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Get Attribute Details

Get the details of an attribute definition and its value.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAttributeDetails
Reference Action Type	Flow
Does this action execute one or more prompt templates?	Yes

Manufacturing | Get Rebate Type Payout Sources

Fetches all rebate type payout sources for a specific rebate type payout provided by the user.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetRebateTypePayoutSourcesForMember
Action Type	Standard
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Get Search Criteria and Results

Finds the search configuration and matching search criteria based on the user input and returns the search results.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetSearchCriteriaAndResults
Reference Action Type	Standard Action

Does this action execute one or more prompt templates?	No
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Manufacturing | Get Service Quote

Gets the approved quotes associated with an asset ID.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetServiceQuote
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Get Price Books

Gets the price books for all specified products.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetPriceBooks
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Get Pricebooks From WorkType

Gets the product IDs associated with a worktype and subsequently gets the pricebook records containing all the retrieved product records.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetPricebooksFromWorkType
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Get Products

Gets the products associated with a specific work type.

REQUIRED EDITIONS

Available in: Lightning Experience

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

Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetProducts
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Get Product Price Details

Gets the price for products based on a user-selected price book.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetProdPriceDtl
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Get Products with Coverage

Gets active asset warranties, service contracts, and entitlements for a specified asset and list of products.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCovForPrdcts
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Get Payout Periods For a Member

Fetches all payout periods for a specific Rebate Program Member, and returns a list of records as list.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetPayoutPeriodsForMember
Action Type	Standard
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

templates?	
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Manufacturing | Perform Bulk Update for Sales Agreement Metrics

Updates the metrics of sales agreements based on the filtering criteria and update details specified by users.

REQUIRED EDITIONS

Available in: Lightning Experience

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

See Common User Access for Standard Agent Actions .	
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Action Details

API Name	PerformBulkUpdateForSalesAgreementMetrics
Reference Action Type	API
Does this action execute one or more prompt templates?	No

Manufacturing | Get Rebate Type Payouts For a Member

Fetches all rebate type payouts for a specific payout period provided by the user, returning a list of records.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetRebateTypePayoutsForMember
Action Type	Standard
Reference Action Type	Flow
Does this action execute one or more prompt templates?	No

Manufacturing | Search Product And Parts

Gets products and associated parts or accessories based on inputs that define the search parameters, including the text-based query string or the base product ID, while using boolean flags to distinguish between text searches and product-related component searches. Provides a list of matching products with their respective pricing, or prompts users for more specific search queries.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SrchPrdctAndParts
Reference Action Type	Flow
Does this action execute one or more prompt templates?	Yes

Manufacturing | Search Dealers for Products

Gets the dealer product searchable field records based on location and user specified search criteria and filters the records to find dealers that offer user requested products in a service territory. Requires City and Postal Code inputs from the user utterance to filter the Dealer Product Searchable Field records.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SrchDealForProds
Reference Action Type	Flow
Does this action execute one or more prompt templates?	Yes

Manufacturing | Summarize Asset Performance

Summarizes the performance, service condition, and telematics data of an asset.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeAssetPerformance
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Manufacturing | Summarize Inventory Details

Summarizes the available inventory for an item at a specific location, including details such as quantity and stock status. The action uses inputs such as product name, inventory location name, and stock status, where stock status values can be shortage, excess, or optimal. Users can provide one or a combination of these inputs to refine the summary.

REQUIRED EDITIONS

Available in: Lightning Experience

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

See Common User Access for Standard Agent Actions .	
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Action Details

API Name	SummarizeInventoryDetails
Action Type	Standard
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Manufacturing | Summarize Rebate Payouts for a Member

Retrieves the overall rebate payout summary for a specified member.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	OverallMemberSummary
Action Type	Standard
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Manufacturing | Summarize Rebate Payouts by Period

Retrieves a rebate program member's payout summary for a specified period.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	RebateProgramMemberSummaryPerPayoutPeriod
Action Type	Standard
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Manufacturing | Summarize Rebate Type Payout Source

Generates a summary of a Rebate Type Payout Source, including the aggregates, benefits, and top transaction journals considered for the payout.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	RebateTypePayoutSourceSummary
Action Type	Standard
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Manufacturing | Summarize Sales Agreement Performance

Generates a summary of the performance of a sales agreement, including the deviations between the planned and actual quantity and revenue values in the sales agreement.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeSalesAgreementPerformance
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Considerations

The generated summary includes the top 3 products with the highest cumulative deviations. For each product, up to 5 schedule deviations, such as months with the highest variance, are displayed. These limits apply even if the sales agreement schedule extends beyond five months. This default configuration is set to ensure performance and stay within LLM context limits, and it applies regardless of the agreement's size or duration, unless customized.

Manufacturing | Forecast to Opportunity Execution

Transform manufacturing program records based on a filter criteria and a grouping strategy.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ForecastsToOpportunityExecution
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Marketing | Create Journey Content

Creates marketing content that's tailored for each customer in a journey using the Journey Decisioning agent template.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in **Enterprise** and **Unlimited** Editions with Marketing Cloud Next and Marketing Cloud Engagement+.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	createJourneyContent
Reference Action Type	Standard Action
Reference Action	Marketing Cloud: Create Journey Content (createJourneyContent)
Does this action execute one or more prompt templates?	Yes
Required Setup	Enable AI Features in Marketing Cloud Next

Journey Selection with a Prompt Template

This action calls the Journey Decisioning Content prompt template. This template executes a flow that creates a data extension containing the customized message content to use in Journey Builder in Marketing Cloud Engagement.

Considerations

- This action is intended for use only in Marketing Cloud journeys.
- For additional details, see [Considerations for the Campaign Creation Agent](#).

Marketing | Draft a Campaign Brief

Creates a draft of the campaign brief based on user-provided campaign details in the Agentforce panel. Use in conjunction with the Save Campaign Brief action.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in **Enterprise** and **Unlimited** Editions with Marketing Cloud.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	draftCampaignBrief
Reference Action Type	Standard Action
Reference Action	Draft a Campaign Brief (draftCampaignBrief)
Does this action execute one or more prompt templates?	Yes
Required Setup	Enable AI Features in Marketing Cloud

Create a Brief with a Prompt Template

This action calls an internal invocable action, which uses internal prompt templates to create and revise a campaign brief.

Considerations

- This action is intended for use only in Marketing Cloud campaigns.
- Campaign components are grounded based on the Key Message and Target Audience fields in the campaign brief.
- Brand identity and tones in the Brand Center aren't used to ground campaigns.
- Campaigns created with Einstein are single send email campaigns.

Marketing | Draft a Campaign Preview

Creates a campaign preview that is generated as part of the brief. The action creates a series of campaign messages, or steps, such as email or SMS. Use in conjunction with the Save Campaign action.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in **Enterprise** and **Unlimited** Editions with Marketing Cloud.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GenerateCampaignFromBrief
Reference Action Type	Standard Action
Reference Action	Marketing Cloud: Draft a Campaign Preview (generateCampaignFromBrief)
Does this action execute one or more prompt templates?	No
Required Setup	Enable AI Features in Marketing Cloud

Considerations

- This action is intended for use only in Marketing Cloud campaigns.
- A brief can be associated with only one campaign.
- You can create a campaign from a manually created brief.
- Campaign preview messages, or steps, are drafted based on the campaign brief.
- To create a draft segment with the campaign, enable Einstein Segment Creation.

Marketing | Draft Content

Creates or revises copy for any text-based property for campaigns and initiatives, including paragraph, heading, email subject line and preheader, and SMS message. Users can revise generated text by entering a different key message or target audience or by selecting a different tone.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on and in **Enterprise** and **Unlimited** Editions with Marketing Cloud.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	DraftOrRefineTextForProperty
Reference Action Type	Standard Action

Does this action execute one or more prompt templates?	Yes
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Marketing Cloud: Draft Content and Prompt Templates

This action calls an internal invocable action, which uses internal-only prompt templates to create and revise emails, SMS messages, and other text in the content builder.

Considerations

- The Draft Content action can draft or revise text in a component that's already on the canvas, but it can't add or remove a component from the canvas.
- To generate or revise a subject line or preheader for an email, use the sparkle button  in the email's property panel. To generate or revise a paragraph or heading, use the sparkle button  on the component toolbar.
- When an AI agent creates a campaign, it uses the key message and target audience of the campaign's associated brief to ground its text generation. You can then ask the agent to revise the text based on a different key message or target audience.
- If a brand is selected for an email, the tone of the generated text matches the default tone in the brand—for example, professional, casual, or urgent. You can select a different tone to revise the text.

Marketing | Create Section with Content

Creates a section in an email or landing page for campaigns and initiatives. Users can specify the number of columns in the section and the components to be included in each column, such as Heading, Paragraph, or Button. Users can also ask the agent to create content for the components in the section.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on and in **Enterprise** and **Unlimited** Editions with Marketing Cloud.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateOrRefineSectionWithContent
Reference Action Type	Standard Action

Does this action execute one or more prompt templates?	Yes
Required Setup	Enable AI Features in Marketing Cloud

Create Section with Content and Prompt Templates

This action calls an internal invocable action, which uses internal-only prompt templates to create and revise sections with content in landing pages and emails in the content builder.

Guidelines and Considerations

- The Create Section with Content action can create only one section at a time.
- This action can create a section with content for an email or landing page, but it can't remove a section or a component within a section from the canvas.
- If a brand is selected for a piece of content, the tone of the generated text in the section matches the tone in the brand—for example, professional, casual, or urgent. You can select a different tone to revise the text.
- When you use Agentforce to create a campaign, it uses the key message and target audience of the campaign's associated brief to ground its text generation. You can use Agentforce to revise the text based on a different key message or target audience.

Marketing | Generate Campaign Insights

Retrieves engagement metrics, such as open rates, clicks, or unsubscribes for a specific campaign. It then generates key content insights about the message activities from the campaign's first flow. For example, identify which channel had better engagement or lower engagement over time.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Foundations and Marketing Cloud Next.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GenerateCampaignInsights
Reference Action Type	Standard Action
Reference Action	Marketing Cloud: Generate Campaign Insights

Does this action execute one or more prompt templates?	Yes
Required Setup	Enable AI Features in Marketing Cloud

Generate Campaign Insights and Prompt Templates

The action is flow-based and calls the invocable action, Get Campaign Engagement Data, to retrieve campaign performance data. It then launches the Generate Campaign Insights prompt to analyze that data and create insights.

Guidelines and Considerations

- This action is intended for use only in Marketing Cloud campaigns.
- This action outputs insights, or suggestions, for improving future campaigns based on the metrics that it finds.
- Insights are based on the first flow in a campaign. Additional flows in the campaign aren't evaluated.
- This action invokes the Marketing Cloud: Summarize Campaign action.

Agent Action: Account Engagement: Get B2B Engagement Studio Programs

Retrieve all Engagement Studio programs, also known as nurture campaigns.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	Account_Engagement_Get_B2B_Engagement_Studio_Programs
Reference Action Type	Standard Action
Reference Action	getB2BEngagementStudioPrograms
Does this action execute one or more prompt templates?	No

Required Setup	Set Up Agentforce for Account Engagement
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Guidelines and Considerations

- Account Engagement actions return only 1,000 records, sorted by the most recently updated.

See Also

[Salesforce Help: Using Agentforce with Account Engagement](#)

Agent Action: Account Engagement: Get B2B Marketing List Memberships

Retrieve a list of marketing lists a prospect is a member of, whether they're subscribed to the lists, and whether the lists are used in nurture programs.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	Account_Engagement_Get_B2B_Marketing_List_Memberships
Reference Action Type	Standard Action
Reference Action	getB2BMarketingListMemberships
Does this action execute one or more prompt templates?	No
Required Setup	Use Account Engagement Actions in Agentforce

Guidelines and Considerations

- Account Engagement actions return only 1,000 records, sorted by the most recently updated.

See Also

[Salesforce Help: Using Agentforce with Account Engagement](#)

Agent Action: Account Engagement: Get B2B Marketing Lists

Retrieve all marketing program lists for a prospect. To retrieve all email preference center subscription lists, use the `isPublic` filter. To retrieve all nurture programs, use the `isSalesforceVisible` filter.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	Account_Engagement_Get_B2B_Marketing_Lists
Reference Action Type	Standard Action
Reference Action	getB2BMarketingLists
Does this action execute one or more prompt templates?	No
Required Setup	Use Account Engagement Actions in Agentforce

Guidelines and Considerations

- Account Engagement actions return only 1,000 records, sorted by the most recently updated.

See Also

[Salesforce Help: Using Agentforce with Account Engagement](#)

Marketing | Get Campaign Objectives (Beta)

Retrieves campaign objectives based on the selected channel type. Use in conjunction with the Get Channel Types action.

REQUIRED EDITIONS

 **Note** Paid Media Optimization Agent is a pilot or beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer,

and the Non-GA Credit Consumption, Non-GA Gen AI, and the Non-GA Open AI LLM Provider terms in the [Product Terms Directory](#). Use of this pilot or beta service is at the Customer's sole discretion.

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in **Enterprise** and **Unlimited** Editions with Marketing Cloud.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCampaignObjectives
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Enable AI Features in Marketing Cloud

Marketing | Get Channel Types (Beta)

Retrieves a list of available channel types for campaign optimization.

REQUIRED EDITIONS

 **Note** Paid Media Optimization Agent is a pilot or beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and the Non-GA Credit Consumption, Non-GA Gen AI, and the Non-GA Open AI LLM Provider terms in the [Product Terms Directory](#). Use of this pilot or beta service is at the Customer's sole discretion.

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in **Enterprise** and **Unlimited** Editions with Marketing Cloud.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetChannelTypes
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Enable AI Features in Marketing Cloud

Marketing | Get Low Performing Ads (Beta)

Retrieves a list of low-performing ads based on campaign metrics and industry benchmarks.

REQUIRED EDITIONS

-  **Note** Paid Media Optimization Agent is a pilot or beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and the Non-GA Credit Consumption, Non-GA Gen AI, and the Non-GA Open AI LLM Provider terms in the [Product Terms Directory](#). Use of this pilot or beta service is at the Customer's sole discretion.

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in **Enterprise** and **Unlimited** Editions with Marketing Cloud.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetLowPerformingAds
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Enable AI Features in Marketing Cloud

Marketing | Get Metrics (Beta)

Retrieves campaign performance metrics based on the selected channel and campaign objective.

REQUIRED EDITIONS

-  **Note** Paid Media Optimization Agent is a pilot or beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and the Non-GA Credit Consumption, Non-GA Gen AI, and the Non-GA Open AI LLM Provider terms in the [Product Terms Directory](#). Use of this pilot or beta service is at the Customer's sole discretion.

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in **Enterprise** and **Unlimited** Editions with Marketing Cloud.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetMetrics
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Enable AI Features in Marketing Cloud

Marketing | Get Score for Record ID

Retrieve marketing scores from Data Cloud for account, contact, lead, and prospect records.

REQUIRED EDITIONS

Available in: Salesforce **Enterprise** and **Unlimited** Editions with Marketing Cloud **Growth** or **Advanced** Edition

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetRecordIdScore
Action Type	Marketing

Reference Action	Marketing Cloud: Get Score for Record ID (GetRecordIdScore)
Does this action execute one or more prompt templates?	No

Considerations

- This action requires that you have already configured individual and account scoring rules.
- A user can retrieve a score only from records they have access to.

See Also

[Salesforce Help](#): Score People and Accounts in Marketing Cloud

Marketing | Identify Business Unit

Retrieves engagement metrics, such as open rates, clicks or unsubscribes, for a specific campaign and generates key insights about the campaign's performance. For example, recommend different subject lines or add more time between email sends to prevent subscriber fatigue.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Foundations and Marketing Cloud Next

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	IdentifyBusinessUnit
Reference Action Type	Standard Action
Reference Action	Marketing Cloud: Identify Business Unit
Does this action execute one or more prompt templates?	No
Required Setup	Enable AI Features in Marketing Cloud

Guidelines and Considerations

- This action is intended for use only in Marketing Cloud campaigns.
- Type "skip" to bypass this action in the rare case it asks you to select a business unit when your org doesn't have business units.

Marketing | Refine Campaign Preview

From user input, refines and replaces campaign preview steps associated with a brief, such as message channels and content, before the campaign is saved.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Foundations and Marketing Cloud Next.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	RefineCampaignPreview
Reference Action Type	Standard Action
Reference Action	Marketing Cloud: Refine Campaign Preview
Does this action execute one or more prompt templates?	Yes
Required Setup	Enable AI Features in Marketing Cloud

Refine Campaign Preview and Prompt Templates

The action is flow-based and references a standard flow. It calls an invocable action to retrieve existing preview steps for the associated brief. It then launches the Refine Campaign Preview prompt to refine the campaign based on user input.

Guidelines and Considerations

- This action is intended for use only in Marketing Cloud campaigns.
- Once a campaign is associated with a brief, the preview can't be refined. To refine the preview and/or create another campaign from the preview, unlink the campaign.

- Email and SMS are the only supported channel types for this action.
- Refining by tone requires a complete instruction of a tone. For example, entering a generic request "Make all the messages professional" won't use the brand's specific definition of professional.

Marketing | Select Journey

Chooses the optimal journey for each subscriber to maximize message engagement.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in **Enterprise** and **Unlimited** Editions with Marketing Cloud Next and Marketing Cloud Engagement+.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	selectJourney
Reference Action Type	Standard Action
Reference Action	Marketing Cloud: Select Journey (selectJourney)
Does this action execute one or more prompt templates?	Yes
Required Setup	Enable AI Features in Marketing Cloud Next

Journey Selection with a Prompt Template

This action calls the Journey Decisioning Selection prompt template. This template executes a flow that creates a data extension containing the subscribers, sorted into the optimal journeys to use in Journey Builder in Marketing Cloud Engagement.

Considerations

- This action is intended for use only in Marketing Cloud journeys.
- For additional details, see [Considerations for the Journey Decisioning Agent](#).

Marketing | Save Campaign

Saves the campaign and its draft components. Use in conjunction with the Create a Campaign from a Brief action.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in **Enterprise** and **Unlimited** Editions with Marketing Cloud.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	saveCampaign
Reference Action Type	Standard Action
Reference Action	Save Campaign (saveCampaign)
Does this action execute one or more prompt templates?	No
Required Setup	Enable AI Features in Marketing Cloud

Considerations

- This action is intended for use only with marketing briefs in conjunction with Marketing Cloud campaigns.
- This action works with Create a Campaign from a Brief standard action.
- If you use required custom fields in your campaign, you must modify the flow that supports this action to provide the correct values for the custom fields.

Marketing | Save Campaign Brief

Saves the brief information, including name, description, key message, and target audience. Use in conjunction with the Draft a Campaign Brief action.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons, and in **Enterprise** and **Unlimited** Editions with Marketing Cloud.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	saveCampaignBrief
Reference Action Type	Standard Action
Reference Action	Save Campaign Brief (saveCampaignBrief)
Does this action execute one or more prompt templates?	Yes
Required Setup	Enable AI Features in Marketing Cloud

Create a Brief with a Prompt Template

This action calls an internal invocable action, which uses internal prompt templates to create and revise a campaign brief.

Considerations

- This action is intended for use only with marketing briefs in conjunction with Marketing Cloud campaigns.
- This action works with the Draft a Campaign Brief standard action.
- If you use required custom fields in your campaign, you must modify the flow that supports this action to provide the correct values for the custom fields.

Marketing | Sign Up Prospect for B2B Marketing Lists

Signs up a prospect for a B2B Marketing List. To use this action with an agent, include a Prospect ID and List ID.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	Account_Engagement_Sign_Up_Prospect_for_B2B_Marketing_Lists
Reference Action Type	Standard Action
Reference Action	signUpProspectB2BMarketingLists
Does this action execute one or more prompt templates?	No
Required Setup	Use Account Engagement Actions in Agentforce

See Also

[Salesforce Help: Using Agentforce with Account Engagement](#)

Marketing | Summarize a Campaign

Summarize a campaign with Agentforce in Marketing Cloud. Campaign details can include flow name, open rate, click through rate, sent, not sent, unsubscribed, opted out, and bounces per flow.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise and Unlimited** Editions with Marketing Cloud.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	summarizeCampaign
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Reference Action Type	Standard Action
Reference Action	Summarize a Campaign (summarizeCampaign)
Does this action execute one or more prompt templates?	No
Required Setup	Enable AI Features in Marketing Cloud

Considerations

- This action is intended for use only in Marketing Cloud campaigns.

Agent Action: Account Engagement: Upsert B2B Prospect

Create or update a prospect record, including its profile, score, and owner. To use this action with an agent, include an Email, Prospect ID, Lead ID, or Contact ID.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	Account_Engagement_Upsert_B2B_Prospect
Reference Action Type	Standard Action
Reference Action	createB2BProspect
Does this action execute one or more prompt templates?	No
Required Setup	Use Account Engagement Actions in Agentforce

See Also

[Salesforce Help: Using Agentforce with Account Engagement](#)

Agent Action: Account Engagement: View B2B Prospect

Retrieve a prospect record, including its profile, score, and owner. To use this action with an agent, include an Email, Prospect ID, Lead ID, or Contact ID.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	Account_Engagement_View_B2B_Prospect
Reference Action Type	Standard Action
Reference Action	viewB2BProspect
Does this action execute one or more prompt templates?	No
Required Setup	Use Account Engagement Actions in Agentforce

See Also

[Salesforce Help: Using Agentforce with Account Engagement](#)

Media | Create Media Opportunity (Beta)

Creates an opportunity and an ad opportunity for a media proposal or an advertisement campaign. The opportunity is associated with the account of the advertiser who the media proposal or advertisement campaign is for. The ad opportunity is associated with the account of the agency that represents the advertiser.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Media add-on or included in Agentforce 1 Media Edition. Requires each user to have the Agentforce for Media add-on to access the action.

USER PERMISSIONS NEEDED

To run flows:	Run Flows
To create media opportunities:	Media Cloud Base User permission set
See Common User Access for Standard Agent Actions .	

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

Action Details

API Name	CreateMediaOpportunity
Reference Action Type	Flow
Reference Action	Find or Create Media Opportunity (Beta) (media_opp_flows__FindOrCreateMediaOpp)
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- If a user provides the name of an account that isn't available, the action doesn't create opportunities and ad opportunities.

See Also

[Agentforce for Media](#)

Media | Create Media Proposal (Beta)

Creates a quote and an ad quote for a media proposal, and adds media products for the proposal. The proposal is associated with the opportunity of the advertisement campaign that the proposal is for. The proposal includes key details such as budget, start and end dates, and price book. For proposal products, details such as price book, quantity, and start and end dates are added.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developerr** Editions with the Agentforce for Media add-on or included in Agentforce 1 Media Edition. Requires each user to have the Agentforce for

Media add-on to access the action.

USER PERMISSIONS NEEDED

To run flows: Run Flows

To create media proposals: Media Cloud Base User permission set

See [Common User Access for Standard Agent Actions](#).

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

Action Details

API Name	CreateMediaProposal
Reference Action Type	Flow
Reference Action	Create Media Proposal (Beta) (media_opp_flows__CreateMediaProposal)
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- If a user doesn't provide the required details such opportunity, price book, start and end dates, and proposal name, the action doesn't create a proposal.
- If a user doesn't provide the product and quantity, the action doesn't add media products to the proposal.
- If a user provides the name of price book that isn't available, the action doesn't create a proposal.

See Also

[Agentforce for Media](#)

Media | Find Media Opportunity (Beta)

Gets a list of opportunities for an advertiser or agency account.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Agentforce for Media add-on or included in Agentforce 1 Media Edition. Requires each user to have the Agentforce for Media add-on to access the action.

USER PERMISSIONS NEEDED

To run flows:	Run Flows
To find media opportunities:	Media Cloud Base User permission set

See [Common User Access for Standard Agent Actions](#).

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

Action Details

API Name	FindMediaOpportunities
Reference Action Type	Flow
Reference Action	Find or Create Media Opportunity (Beta) (media_opp_flows__FindOrCreateMediaOpp)
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- If a user provides the name of an account that isn't available, the action can't get an opportunity list.

See Also

[Agentforce for Media](#)

Media | Get Media Products (Beta)

Gets a filtered list of media products that are part of a price book and match a search phrase. Users can provide various search phrase combinations that can include product name, SKU, code, and price range. If users aren't sure about the product they are looking for, the action can also get products based on price book name.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developerr** Editions with the Agentforce for Media add-on or included in Agentforce 1 Media Edition. Requires each user to have the Agentforce for Media add-on to access the action.

USER PERMISSIONS NEEDED

To run flows:	Run Flows
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To get media products:	Media Cloud Base User permission set
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See [Common User Access for Standard Agent Actions](#).

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

Action Details

API Name	GetMediaProducts
Reference Action Type	Flow
Reference Action	Get Media Products (Beta) (media_opp_flows__GetMediaProducts)
Does this action execute one or more prompt templates?	No
Required Setup	Ad Products and Services in Advertising Sales Management Configure Ad Product and Service Prices

Guidelines and Considerations

- If a user provides the name of price book that isn't available, the action can't find products.
- If a user provides a price range, the action retrieves a list of products whose prices fall within the range in the user's specified price book.
- If a user specifies any other product information apart from name, SKU, and code in the search phrase, the action doesn't consider those values when finding matching products.
- If a user specifies a search phrase that includes the product name, SKU, or code, the action only

retrieves products with an exact match.

See Also

[Agentforce for Media](#)

Media | Get Media Products Based on Targeting (Beta)

Gets a list of media products that are part of a price book and match a targeting criteria. The targeting criteria can include a list of targeting values. If users aren't sure about the products they are looking for, they can expand their search criteria by providing a list of targeting categories and segments.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developerr** Editions with the Agentforce for Media add-on or included in Agentforce 1 Media Edition. Requires each user to have the Agentforce for Media add-on to access the action.

USER PERMISSIONS NEEDED

To run flows: Run Flows

To get media products based on targeting criteria: Media Cloud Base User permission set

See [Common User Access for Standard Agent Actions](#).

-  **Note** Get Media Products Based on Targeting action is a pilot or beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the [Product Terms Directory](#). Use of this pilot or beta service is at the Customer's sole discretion.

Action Details

API Name	GetMediaProductsBasedOnTargeting
Reference Action Type	Flow
Reference Action	Get Media Products (Beta) (media_opp_flows__GetMediaProducts)
Does this action execute one or more prompt templates?	No
Required Setup	Ad Products and Services in Advertising Sales Management

	Configure Ad Product and Service Prices Configure Your Audience Targeting Options in Advertising Sales Management
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Guidelines and Considerations

- If a user provides the name of price book that isn't available, the action can't find products.
- If the user provides a list of targeting values, targeting segments, and targeting categories, the action retrieves products that exact match either of the values, segments, and categories.
- If a user provides a targeting value, the action retrieves a list of products associated with the targeting value through Ad Target Segment Value records.
- If a user provides a targeting category or targeting segment, the action retrieves a list of products associated with the targeting category or targeting segment through Ad Target Category and Ad Target Category Segment records.

See Also

[Agentforce for Media](#)

Media | Media Opportunity Summary (Beta)

Summarizes media opportunities with actionable information such as closure risks, advertiser or agency sentiment, current stage, and next best steps.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developerr** Editions with the Agentforce for Media add-on or included in Agentforce 1 Media Edition. Requires each user to have the Agentforce for Media add-on to access the action.

USER PERMISSIONS NEEDED

To run prompt templates: Execute Prompt Templates

To summarize media opportunities: Media Cloud Base User permission set

See [Common User Access for Standard Agent Actions](#).

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

Action Details

API Name	MediaOpportunitySummary
Reference Action Type	Prompt Template
Reference Action	Summarize Media Opportunity (Beta) (einstein_gpt__summarizeOpportunityMedia)
Does this action execute one or more prompt templates?	Yes

Media Opportunity Summary and Prompt Template

This agent action calls the Summarize Media Opportunity (Beta) prompt template of type Record Summary to generate summaries for media opportunities. The prompt template uses the Add Media Opportunity Summary to Prompt Template (Beta) flow to find the information to summarize. The prompt template uses information from the opportunity and its related ad opportunities, quotes, ad quotes, and tasks to summarize the opportunity. If the flow provides the prompt template with information from multiple related quotes, ad quotes, and tasks, the prompt template prioritizes summarizing information from the latest records.

Guidelines and Considerations

- The summary that the action generates is dependent on the information that's available in the opportunity and its related records.
- The summary that's generated is restricted to 200 words.

See Also

[Agentforce for Media](#)

Net Zero Cloud | Combine Snippets

Combines two environmental, social, and governance (ESG) reports related snippets to generate the final snippet content. One snippet is from the document clause record and the other snippet is from the agent conversation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero add-on or included in Agentforce 1 Net Zero Edition. Requires each user to have the Agentforce for Net Zero add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CombineSnippets
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for ESG Reporting

Guidelines and Considerations

- The product is only available in English.
- All calls are currently sent to OpenAI models.
- Data Cloud One isn't supported.
- Row-level access control isn't enforced for Data 360. This means the Reporting Agent may read documents uploaded by all users.

Net Zero Cloud | Draft Disclosure Responses

Answers queries and drafts snippets related to environmental, social, and governance (ESG) topics. These include the organization's policies and practices regarding climate change, energy efficiency, greenhouse gas removal, renewable energy, and other sustainability issues.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero add-on or included in Agentforce 1 Net Zero Edition. Requires each user to have the Agentforce for Net Zero add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	DraftDisclosureResponses
Reference Action Type	Standard Action

Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for ESG Reporting

Guidelines and Considerations

- The product is only available in English.
- All calls are currently sent to OpenAI models.
- Data Cloud One isn't supported.
- Row-level access control isn't enforced for Data Cloud. This means the Reporting Agent may read documents uploaded by all users.

Net Zero Cloud | Draft Snippet For Question

Answers queries that originate from assessment question records directly associated to a document clause record. These include providing information relevant to environmental, social, and governance (ESG) reporting.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero add-on or included in Agentforce 1 Net Zero Edition. Requires each user to have the Agentforce for Net Zero add-on to access the action.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	DraftSnippetForQuestion
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for ESG Reporting

Guidelines and Considerations

- The product is only available in English.

- All calls are currently sent to OpenAI models.
- Data Cloud One isn't supported.
- Row-level access control isn't enforced for Data 360. This means the Reporting Agent may read documents uploaded by all users.

Net Zero Cloud | Get Vehicle Asset Emission Source Data

Answer questions related to source of greenhouse gas emissions from the vehicle assets.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero add-on or included in Agentforce 1 Net Zero Edition. Requires each user to have the Agentforce for Net Zero add-on to access the action.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	GetVehicleAssetEmssnSrcData
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Data Collection Agent

Guidelines and Considerations

- The product is only available in English.
- All calls are currently sent to OpenAI models.
- Data Cloud One isn't supported.
- Row-level access control isn't enforced for Data 360.

Net Zero Cloud | Get Stationary Asset Environmental Source Data

Answer questions related to stationary assets and their emissions factors.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero add-on or included in Agentforce 1 Net Zero Edition. Requires each user to have the Agentforce for Net Zero add-on to access the action.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	GetStnryAssetEnvrSrcData
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Data Collection Agent

Guidelines and Considerations

- The product is only available in English.
- All calls are currently sent to OpenAI models.
- Data Cloud One isn't supported.
- Row-level access control isn't enforced for Data 360.

Net Zero Cloud | Get Sustainability Stakeholder Data

Identify stakeholders based on their role and the reference object associated with this stakeholder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero add-on or included in Agentforce 1 Net Zero Edition. Requires each user to have the Agentforce for Net Zero add-on to access the action.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	GetSustainabilityStakeholderData
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Data Collection Agent

Guidelines and Considerations

- The product is only available in English.
- All calls are currently sent to OpenAI models.
- Data Cloud One isn't supported.
- Row-level access control isn't enforced for Data 360.

Net Zero Cloud | Manage Sustainability Task Group

Manage a sustainability task group by sending follow-up emails to stakeholders with incomplete tasks in an existing sustainability task group. Improve stakeholder engagement and completion rates for environmental, social, and governance (ESG) data collection.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero add-on or included in Agentforce 1 Net Zero Edition. Requires each user to have the Agentforce for Net Zero add-on to access the action.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	ManageSustainabilityTaskGroup
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Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Data Collection Agent

Guidelines and Considerations

- The product is only available in English.
- All calls are currently sent to OpenAI models.
- Data Cloud One isn't supported.
- Row-level access control isn't enforced for Data 360.

Net Zero Cloud | Get Sustainability Task Group Data

Answer questions related to the task groups in the company's environmental, social, and governance (ESG) data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero add-on or included in Agentforce 1 Net Zero Edition. Requires each user to have the Agentforce for Net Zero add-on to access the action.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	GetSustainabilityTaskGroupData
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Data Collection Agent

Guidelines and Considerations

- The product is only available in English.
- All calls are currently sent to OpenAI models.
- Data Cloud One isn't supported.
- Row-level access control isn't enforced for Data 360.

Net Zero Cloud | Create Sustainability Task Group

Create a sustainability task group and notify sustainability stakeholders about environmental, social, and governance (ESG) data collection activities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Net Zero Cloud Growth license or the Net Zero Cloud User add-on license and the Agentforce for Net Zero add-on or included in Agentforce 1 Net Zero Edition. Requires each user to have the Agentforce for Net Zero add-on to access the action.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	CreateSustainabilityTaskGroup
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Data Collection Agent

Guidelines and Considerations

- The product is only available in English.
- All calls are currently sent to OpenAI models.
- Data Cloud One isn't supported.
- Row-level access control isn't enforced for Data 360.

Personalization | Get Context

Provides an agent with personalized context from Data Cloud to help it select the most appropriate next action in customer interactions.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	PersonalizeContext
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Configure Personalization: Get Context Action

Guidelines and Considerations

- The current action is restricted to analyzing only the profile data graph of the individual to retrieve any contextual information.

Personalization | Get Recommendations

This agent action generates product and content recommendations tailored to the user's preferences, behavior, and interactions. The recommendations are based on the current context or specific user query.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, Professional, and Developer** Editions with Data Cloud

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	getRecommendations
Reference Action Type	Standard Action
Reference Action	getPersonalizationDecisions
Does this action execute one or more prompt templates?	No
Required Setup	Salesforce Personalization license Setup Configuration

Guidelines and Considerations

- To ensure that links to external sites or content generated from external domains work correctly, you must add any external URLs your agent uses to an allowlist. You can do this by adding the domains to the Trusted URLs list in Setup or by including the specific URLs in the agent's instructions. If a URL is not on an allowlist, the agent's response containing the link is blocked. For more information or instructions, see [this article](#).

See Also

[Personalization | Understand User Intent](#)

[Personalization | Understand User Intent](#)

Understands a user's natural language query to extract their intent, including the item and relevant filter criteria, which results in more personalized recommendations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, Professional, and Developer** Editions with Data Cloud

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	UnderstandUserIntent
Reference Action Type	Prompt Template
Reference Action	Personalization__understandUserIntent
Does this action execute one or more prompt templates?	Yes
Required Setup	Setup Configuration

Chain with Personalization | Get Recommendations Action

Combine the Personalization | Understand User Intent and Personalization | Get Recommendations actions to make full use of their potential. The user intent and filter criteria extracted by the first action provide the Get Recommendations action with the precise input needed to generate optimal product or content recommendations.

Personalization | Understand User Intent and Prompt Templates

This action uses a prompt template of type Intent Retrieval to extract a user's intent and filter criteria from conversational input.

Guidelines and Considerations

- This action is designed to work in tandem with the Get Recommendations action. Its primary function is to extract the user's intent, which is then used by Get Recommendations to deliver more tailored results. Both actions are included together in the Get Personalized Recommendations standard topic.

See Also

[Personalization | Get Recommendations](#)

Program and Case Management | Create Participant Benefits

Generate a benefit disbursement record that includes all required records for program enrollment and benefit assignment. If any related records are missing, the flow creates them as needed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the

Agentforce for Nonprofit add-on to access the action.

PERMISSIONS NEEDED

To execute actions in Employee Agent agents:	SEE THIS PAGE FOR DETAILS
To run flows:	Run Flows
To turn on Nonprofit Cloud AI Settings:	Customize Applications
To use the Program Management assistive AI features:	Programs Assistive AI
To use the Create Participant Benefits action:	Advanced Program Management permission

Action Details

API Name	CreateParticipantBenefits
Reference Action Type	Flow
Reference Action	Get Participant Goal (createParticipantBenefits)
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- Include key words in your requests to the agent, such as *benefit* or *goal*, especially if you have benefits and goals with similar names.
- Clear your agent conversation history between participants to avoid confusion.
- When confirming the new benefit disbursement, the user sees the fields from the compact layout. Modify the fields on the Benefit or Person Account page layouts to show different fields.
- If a field's API name differs from its label, add it to the list of fields in the instructions.
- The flow behind this action is an overridable flow. Copy and customize the flow to better fit your organization's needs.

Program and Case Management | Create Referral

Generate a referral record that includes all of the required fields.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the Agentforce for Nonprofit add-on to access the action.

PERMISSIONS NEEDED

To execute actions in Employee Agent agents:	SEE THIS PAGE FOR DETAILS
To run flows:	Run Flows
To turn on Nonprofit Cloud AI Settings:	Customize Applications
To use the Program Management assistive AI features:	Programs Assistive AI
To use the Create Referral action:	Case Referral permission set

Action Details

API Name	CreateReferral
Reference Action Type	Flow
Reference Action	Create Referral (createReferral)
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- You can update a referral immediately after creation. Otherwise, use the Referral name (auto number) to find the referral that you want to update.
- Include key words in your requests to the agent, such as `refer` or `referral`, to help the agent find the right topic.
- Clear your agent conversation history between participants to avoid confusion.
- If a field's API name differs from its label, add it to the list of fields in the instructions.
- The flow behind this action is an overridable flow. Copy and customize the flow to better fit your organization's needs.

Program and Case Management | Get Participant Goal

Retrieves a list of goals that are assigned to the participant.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the Agentforce for Nonprofit add-on to access the action.

PERMISSIONS NEEDED

To execute actions in Employee Agent agents:	SEE THIS PAGE FOR DETAILS
To run flows:	Run Flows
To turn on Nonprofit Cloud AI Settings:	Customize Applications
To use the Program Management assistive AI features:	Programs Assistive AI
To use the Get Participant Goal action:	Advanced Program Management permission set

Action Details

API Name	GetParticipantGoal
Reference Action Type	Flow
Reference Action	Get Participant Goal (getParticipantGoal)
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- Include key words in your requests to the agent, such as *benefit* or *goal*, especially if you have benefits and goals with similar names.
- Clear your agent conversation history between participants to avoid confusion.
- If a field's API name differs from its label, add it to the list of fields in the instructions.
- The flow behind this action is an overridable flow. Copy and customize the flow to better fit your organization's needs.

Program and Case Management | Prepare Participant Notes

Fixes spelling and grammatical errors, applies formatting and best practices from the provided template, and structures the information to highlight key points, decisions, and action items in the notes of a

meeting with a participant or client.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the Agentforce for Nonprofit add-on to access the action.

PERMISSIONS NEEDED

To execute actions in Employee Agent agents: [SEE THIS PAGE FOR DETAILS](#)

To run flows: Run Flows

To run prompt templates: Execute Prompt Templates

Action Details

API Name	PrepareParticipantNotes
Reference Action Type	Prompt Template
Reference Action	Prepare Participant Notes (prepareParticipantNotes)
Does this action execute one or more prompt templates?	Yes

Prepare Participant Notes and Prompt Templates

This action uses the Prepare Participant NotesApplies formatting to fix grammatical and spelling errors to transform informal meeting notes into interaction documentation.

Program Based Business | Forecasts to Opportunities Filter Criteria

Creates the filter criteria based on the input provided by the user.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the

Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ForecastsToOpportunitiesFilterCriteria
Reference Action Type	API
Does this action execute one or more prompt templates?	No

Program Based Business | Forecast to Opportunity Execution

Transform manufacturing program records based on a filter criteria and a grouping strategy.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ForecastsToOpportunityExecution
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Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Program Based Business | OpportunityJsonBuilder

Creates an object that contains the new opportunity details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	OpportunityJsonBuilder
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Public Sector | Automatically Resolve Complaint

If the incident reported in a complaint occurred more than two years ago, asks whether the user wants to resolve the complaint. If the user confirms, sets the complaint status to Resolved.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for

Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Automatically Resolve Complaint action:
Public Sector Access permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	AutoResolveComplaint
Reference Action Type	Flow
Reference Action	Automatically Resolve Complaint (pss_agent__AutoResolveComplaint-1)
Does this action execute one or more prompt templates?	No

See Also

[Complaint Resolution with Agentforce](#)

Public Sector | Check For Regulatory Code Violation

Evaluates user input against regulatory code documents to determine violations. Cross-references the input with relevant code sections and provides a clear, concise determination, including specific clause references and supporting explanations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions in the Compliance Management agent:
Public Sector Access

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ChkForRegulatoryCodeViolation
Reference Action Type	Prompt Template
Reference Action	Summarize Regulatory Code Violation (SummarizeRegulatoryCodeViolation)
Does this action execute one or more prompt templates?	Yes
Required Setup	Compliance Management with Agentforce

Check For Regulatory Code Violation and Prompt Templates

This agent action calls the Summarize Regulatory Code Violation prompt template to generate a summary of the regulatory code violation details that it extracts from the violation documents.

Public Sector | Create Assessment for Public Complaint

Creates an assessment record for a public complaint.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Create Assessment for Public Complaint action:

Public Sector Access permission set

AND

Industries Assessment permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateAsmtForPublicCmplnt
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Reference Action Type	Flow
Reference Action	Create Assessment for Public Complaint (pss_agent__CreateAsmtForPublicCmplnt-1)
Does this action execute one or more prompt templates?	No

See Also

[Complaint Resolution with Agentforce](#)

Public Sector | Create Assessment Question Response

Creates an assessment question response record for an assessment question by using the response text, and relates the assessment question response to the assessment.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Create Assessment Question Response action:

Public Sector Access permission set

AND

Industries Assessment permission set

[See Common User Access for Standard Agent Actions.](#)

Action Details

API Name	CreateAsmtQstnResp
Reference Action Type	Flow
Reference Action	Create Assessment Question Response (pss_agent__CreateAsmtQstnResp-1)
Does this action execute one or more prompt templates?	No

See Also

[Complaint Resolution with Agentforce](#)

Public Sector | Create Candidate Leads

Creates lead records for potential candidates for a vacancy. In the lead records, includes information from the party profile of applicants who submitted the application forms selected by the user.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Create Candidate Leads action: Talent Recruitment Management Specialist Access permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateCandidateLeads
Reference Action Type	Flow
Reference Action	Create Candidate Leads (rcrt_agent__CreateCandidateLeads-1)
Does this action execute one or more prompt templates?	No

See Also

[Candidate Sourcing with Agentforce](#)

Public Sector | Create Regulatory Code Violation

Creates a regulatory code violation record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions in the Compliance Management agent: Public Sector Access

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ChkForRegulatoryCodeViolation
Reference Action Type	Flow
Reference Action	Create Regulatory Code Violation (CreateRegulatoryCodeViolation)
Does this action execute one or more prompt templates?	No
Required Setup	Compliance Management with Agentforce

Public Sector | Create Regulatory Code Violation for Public Complaint

Creates a regulatory code violation record for the specified regulatory code using the given information, and associates the record with the given public complaint.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Create Regulatory Code Violation for Public Complaint action: Public Sector Access permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateRgntyCodeVioForCmplnt
Action Type	Standard
Reference Action Type	Flow
Reference Action	CreateRgntyCodeViolation (pss_agnt_cmn__CreateRgntyCodeViolation-1)
Does this action execute one or more prompt templates?	No

See Also

[Complaint Resolution with Agentforce](#)

Public Sector | Create Regulatory Transaction Fee

Creates regulatory transaction fee and regulatory transaction fee item records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions in the Compliance Management agent: **Public Sector Access**

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateRegulatoryTransactionFee
Reference Action Type	Flow
Reference Action	Create Regulatory Transaction Fee (CreateRegulatoryTrxnFee)

Does this action execute one or more prompt templates?	No
Required Setup	Compliance Management with Agentforce

Public Sector | Create Violation Enforcement Action

Creates a violation enforcement action record for a regulatory code violation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions in the Compliance Management agent: Public Sector Access

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateVioEnforcementAction
Reference Action Type	Flow
Reference Action	Create Violation Enforcement Action (CreateVioEnfrcAction)
Does this action execute one or more prompt templates?	No
Required Setup	Compliance Management with Agentforce

Public Sector | Draft Visit Summary Email

Generates a professional email summarizing the visit with details about the visit, regulatory code violations, enforcement actions, and regulatory fees along with their due dates and resolution notes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

User Permissions Needed	
To execute actions in the Compliance Management agent:	Public Sector Access
See Common User Access for Standard Agent Actions .	

Action Details

API Name	DraftVisitSummaryEmail
Reference Action Type	Prompt Template
Reference Action	Draft Visit Summary Email (DraftVisitSummaryEmail)
Does this action execute one or more prompt templates?	Yes
Required Setup	Compliance Management with Agentforce

Draft Visit Summary Email and Prompt Templates

This agent action calls the Draft Visit Summary Email prompt template to generate a professional email summarizing the visit details. The email highlights key regulatory code violations, enforcement actions, and any relevant fees, along with their due dates and resolution notes. The email encourages timely action on any outstanding issues.

Public Sector | Email Candidate Leads

Sends emails to candidates who are identified as leads for a vacancy to invite them to check the recruitment posting and apply for the job.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Email Candidate Leads action: Talent Recruitment Management Specialist Access permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	EmailCandidateLeads
Reference Action Type	Flow
Reference Action	Email Candidate Leads (rcrt_agent__EmailCandidateLeads-1)
Does this action execute one or more prompt templates?	No

See Also

[Candidate Sourcing with Agentforce](#)

Public Sector | Email Complaint Participant

When the user asks to notify the complainant or the perpetrator, generate an email based on the given template. Show the body of the generated email to the user and get approval. Send the email to the complainant or perpetrator.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Email Complaint Participant action: Public Sector Access permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	EmailComplaintParticipant
Reference Action Type	Flow
Reference Action	Email Complaint Participant (pss_agent__EmailComplaintParticipant-1)
Does this action execute one or more prompt templates?	No

See Also

[Complaint Resolution with Agentforce](#)

Public Sector | Find Similar Complaints

Finds public complaints that are similar to a public complaint by matching the keywords in the complaint summary.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Find Similar Complaints action:

Public Sector Access permission set

AND

Agentforce for Public Sector permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindSimilarComplaints
Reference Action Type	Prompt Template
Reference Action	Find Similar Complaints

	(pss_agent__FindSimilarComplaints)
Does this action execute one or more prompt templates?	Yes

Find Similar Complaints Prompt Template

This action uses the Find Similar Complaints prompt template to get the Salesforce record IDs of previously closed public complaints that are similar to a public complaint record. The prompt template passes the keywords in the Complaint Summary field of the input public complaint record to a search retriever. The retriever finds and returns a list of public complaint records that have similar keywords and a status of Closed. The prompt template chooses the records that have a score of 0.7 or more, and returns their Salesforce record IDs.

See Also

[Complaint Resolution with Agentforce](#)

Public Sector | Find Similar Complaints Against Perpetrator

Finds similar complaints against a perpetrator related to a public complaint.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Find Similar Complaints Against Perpetrator action:	Public Sector Access permission set
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See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindSmlrCmpltAgnstPerpetrator
Reference Action Type	Flow
Reference Action	Find Similar Complaints Against Perpetrator (pss_agent__FindSmlrPerpetratorCmplt-1)

Does this action execute one or more prompt templates?	No
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See Also

[Complaint Resolution with Agentforce](#)

Public Sector | Find Similar Unresolved Complaints

Finds unresolved complaints that are similar to a complaint by matching keywords in the complaint summary.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Find Similar Unresolved Complaints action: Public Sector Access permission set

AND

Agentforce for Public Sector permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindSimilarUnresolvedCmplnt
Reference Action Type	Prompt Template
Reference Action	Find Similar Unresolved Complaints (pss_agent__FindSimilarUnresolvedCmplnt)
Does this action execute one or more prompt templates?	Yes

Find Similar Unresolved Complaints Prompt Template

This action uses the Find Similar Unresolved Complaints prompt template to get the Salesforce record IDs of public complaints that are similar to a public complaint record and are yet to be closed. The

prompt template passes the keywords in the Complaint Summary field of the input public complaint record to a search retriever. The retriever finds and returns a list of public complaint records that have similar keywords and a status of Closed. The prompt template returns the Salesforce record IDs of the public complaint records.

See Also

[Complaint Resolution with Agentforce](#)

Public Sector | Get Assessment Questions

Gets the IDs of the assessment questions associated with an assessment question set.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Get Assessment Questions action:

Public Sector Access permission set

AND

Industries Assessment permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAssessmentQuestions
Reference Action Type	Flow
Reference Action	Get Assessment Questions for Public Complaint (pss_agent__GetAsmtQstForPublicCmplnt-1)
Does this action execute one or more prompt templates?	No

See Also

[Complaint Resolution with Agentforce](#)

Public Sector | Get Assessment Question Text and Response Values

Gets the question text and response values for an assessment question.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Get Assessment Question Text and Response Values action:

Public Sector Access permission set

AND

Industries Assessment permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAsmtQstnTextRespValues
Reference Action Type	Flow
Reference Action	Get Assessment Question Text and Response Values (pss_agent__GetAsmtQstnTextRespValues-1)
Does this action execute one or more prompt templates?	No

See Also

[Complaint Resolution with Agentforce](#)

Public Sector | Get Candidates And Create Leads

Retrieves a list of candidates whose skills align with the job posting, and creates corresponding candidate leads for recruitment.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Get Candidates and Create Leads action: Talent Recruitment Management Specialist Access permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCandidatesAndCreateLeads
Reference Action Type	Flow
Reference Action	Get Candidates and Create Leads (rcrt_agent__GetCandidatesAndCreateLeads-1)
Does this action execute one or more prompt templates?	No

Public Sector | Get Candidates with Matched Skills

Gets a list of candidates who match the requested skills and job post criteria.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Get Candidates with Matched Skills action: Talent Recruitment Management Specialist Access permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCandidatesWithMatchedSkills
Reference Action Type	Flow
Reference Action	Get Candidates with Matched Skills (rcrt_agent__GetCandidatesWithMatchedSkills-1)
Does this action execute one or more prompt templates?	No

Public Sector | Get Examination and Competency Details for Skills

Gets a list of IDs for examinations and competencies that match the input skill names. Then, sends those details to the associated prompt template. Outputs a JSON list of skill-to-record ID pairings.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Get Examination and Competency Details for Skills action:	Talent Recruitment Management Specialist Access permission set
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See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FetchExaminationAndCompetency
Reference Action Type	Flow
Reference Action	Get Examination and Competency Details for Skills (rcrt_agent__FetchExaminationAndCompetency-1)
Does this action execute one or more prompt templates?	No

Public Sector | Get Regulatory Code Violation Details

Analyzes the user's request to identify the relevant section or clause from the regulatory code violation documents. Extracts and provides detailed information about the identified section or clause, ensuring the response directly addresses the user's question and adheres strictly to the regulations outlined in the documents.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions in the Compliance Management agent:

Public Sector Access

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetRegulatoryCodeViolationDtl
Reference Action Type	Prompt Template
Reference Action	Summarize Regulatory Code Details (SummarizeRegulatoryCodeDetails)
Does this action execute one or more prompt templates?	Yes
Required Setup	Compliance Management with Agentforce

Get Regulatory Code Violation Details and Prompt Templates

This agent action calls the Summarize Regulatory Code Violation prompt template to generate a summary of the regulatory code violation details that it extracts from the violation documents.

Public Sector | Get Relevant Application Forms

Gets a list of application form records that are relevant to the given recruitment posting record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Get Relevant Application Forms action: Talent Recruitment Management Specialist Access permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetRelevantApplicationForms
Reference Action Type	Flow
Reference Action	Get Relevant Application Forms (rcrt_agent__GetRelevantAppInForms-1)
Does this action execute one or more prompt templates?	No

See Also

[Candidate Sourcing with Agentforce](#)

Public Sector | Get Relevant Regulatory Codes

Gets the regulatory codes that could be violated by the incident reported in a public complaint.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Get Relevant Regulatory Codes action:

Public Sector Access permission set

USER PERMISSIONS NEEDED

AND

Agentforce for Public Sector permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetRelevantRegulatoryCodes
Reference Action Type	Prompt Template
Reference Action	Get Relevant Regulatory Codes (pss_agent__GetRelevantRegulatoryCodes)
Does this action execute one or more prompt templates?	Yes

Get Relevant Regulatory Codes Prompt Template

This action uses the Get Relevant Regulatory Codes prompt template to get the Salesforce record IDs of regulatory codes that could be violated by the incident reported in a complaint. The prompt template passes the keywords in the Complaint Summary field of the input public complaint record to a search retriever. The retriever finds and returns a list of regulatory code records that match the complaint's keywords. The prompt template returns the Salesforce record IDs of the regulatory code records.

See Also

[Complaint Resolution with Agentforce](#)

Public Sector | Get Relevant Skill IDs

Gets a list of IDs for skills that are linked to the specified recruitment post record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Get Relevant Skill IDs action: Talent Recruitment Management Specialist Access permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetSkillsUseRecruitmentPostId
Reference Action Type	Flow
Reference Action	Get Relevant Skill IDs (rcrt_agent__GetSkillsUseRecruitmentPostId-1)
Does this action execute one or more prompt templates?	No

Public Sector | Get Unprocessed Regulatory Codes

Gets the regulatory codes that are relevant to a public complaint for which regulatory code violations don't exist.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Get Unprocessed Regulatory Codes action: Public Sector Access permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetUnprocessedRgltCodes
Reference Action Type	Flow

Reference Action	Get Unprocessed Regulatory Codes for the Complaint (pss_agent__GetUnprocessedRgltCodes-1)
Does this action execute one or more prompt templates?	No

See Also

[Complaint Resolution with Agentforce](#)

Public Sector | Get Violation Enforcement Actions

Gets violation enforcement actions and penalties to answer a user's question about a specific regulatory code violation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions in the Compliance Management agent:	Public Sector Access
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See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetViolationEnforcementActions
Reference Action Type	Prompt Template
Reference Action	Summarize Violation Enforcement Actions and Penalties (SummarizeViolEnfActionsPenaltiesDetails)
Does this action execute one or more prompt templates?	Yes
Required Setup	Compliance Management with Agentforce

Get Violation Enforcement Actions and Prompt Templates

This agent action calls the Summarize Violation Enforcement Actions and Penalties prompt template to generate a summary of the violation enforcement actions and penalties related to a specific regulatory code violation from the violation documents.

Public Sector | Preview Hiring Managers

Previews the hiring managers that are associated with the application form. Before sharing an application form with the hiring managers, always call this action to preview hiring managers who are also application form participants.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions in the Recruiter agent: Talent Recruitment Management Specialist Access

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	PreviewHiringManagers
Reference Action Type	Flow
Reference Action	Create Application Form Participant Records (CreateApplnFormParticipants)
Does this action execute one or more prompt templates?	No
Required Setup	Application Screening with Agentforce

Public Sector | Send Visit Summary Email

Sends an email with the visit summary to the recipient, the primary owner, business owner, or responsible party.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions in the Compliance Management agent:	Public Sector Access
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See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SendVisitSummaryEmail
Reference Action Type	Flow
Reference Action	Email Inspection Visit Summary (EmailInspectionVisitSum)
Does this action execute one or more prompt templates?	No
Required Setup	Compliance Management with Agentforce

Public Sector | Share Application Form with Hiring Manager

Shares an application form with employees having a participant role as Hiring Manager. Gets recruitment requisition participants from the related recruitment posting. Based on the recruitment requisition participants, creates application form participant records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions in the Recruiter agent:	Talent Recruitment Management Specialist Access
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USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ShareApplicationFormWithHiringManagers
Reference Action Type	Flow
Reference Action	Create Application Form Participant Records (CreateApplnFormParticipants)
Does this action execute one or more prompt templates?	No
Required Setup	Application Screening with Agentforce

Public Sector | Summarize Application Form

Summarizes the applicant's data for a job posting. Helps the user get a summary of all the data in one place.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To execute actions in the Recruiter agent: Talent Recruitment Management Specialist Access

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeApplicationForm
Reference Action Type	Prompt Template
Reference Action	Summarize Application Form

	(SummarizeApplicationForm)
Does this action execute one or more prompt templates?	Yes
Required Setup	Application Screening with Agentforce

Summarize Application Form and Prompt Templates

This agent action calls the Summarize Application Form prompt template to generate a plain-text, easy-to-read summary of an application form.

Public Sector | Summarize Public Complaint

Creates a rich-text summary of a public complaint record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Public Sector add-on or included in Public Sector for Agentforce 1 Service Edition. Requires each user to have the Agentforce for Public Sector add-on to access the action.

USER PERMISSIONS NEEDED

To use the Summarize Public Complaint action:

Public Sector Access permission set

AND

Agentforce for Public Sector permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizePublicComplaint
Reference Action Type	Prompt Template
Reference Action	Summarize Public Complaint (pss_agent__SummarizePublicComplaint)
Does this action execute one or more prompt	Yes

templates?

Summarize Public Complaint Prompt Template

This action uses the Summarize Public Complaint prompt template to get a rich-text summary of a complaint. The summary includes an overview of the complaint, the name of the complainant, the resolution priority, key contacts, and a list of missing fields, supporting documents, and recent activities.

See Also

[Complaint Resolution with Agentforce](#)

Revenue | Add Quote Line Item to Quote

Creates a line item record and adds it to a Revenue Cloud quote.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Foundations.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	AddQuoteLineItem
Reference Action Type	Flow
Reference Action	Add Quote Line Item to Quote
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce for Revenue

Guidelines and Considerations

- You can add one-time, term-defined, and evergreen products to quotes. Add one-time products without a start date, but include a start date when adding evergreen products.
- The products specified in the request must be associated with a default product selling option.
- Before adding a product to a quote, the agent retrieves the product's default selling model and asks

for your confirmation.

- If you don't specify a price book in the opportunity record, the agent uses the standard price book.
- You can't configure a product by using the agent. After the agent adds a product to a quote, open the quote and then configure the product.
- The action doesn't support numbers that are formatted with delimiters. For example, in the US, the maximum product quantity that the agent can enter is 999 units. If you add 1,000 units, the agent throws an error.
- The agent can add up to 10 products at a time to a quote.
- The agent can't add products in partial quantities.

Revenue | Apply Discount To Quote Line Item

Applies a discount, expressed as a percentage, to a line item on a Revenue Cloud quote.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Foundations.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ApplyDiscountToQLI
Reference Action Type	Flow
Reference Action	Apply Discount To Quote Line Item
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce for Revenue

Guidelines and Considerations

- If there are multiple quote line items with the same name, the action applies the discount to the first matching line item in Transaction Line Editor.
- The agent can only process discounts that are expressed as a percentage.
- The action doesn't support manual discounts.
- The agent doesn't verify if a quote line item is price-inclusive. However, we recommend that you don't add discounts to child products within a price-inclusive bundle.

Revenue | Create Amendment Quote

Creates an amendment quote in Revenue Cloud and then generates a related amendment opportunity for an account with active assets. An amendment quote, also known as an add-on quote or a change quote, increases the quantity of assets a customer has purchased or modifies some aspect of those assets.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Foundations.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateAmendmentQuote
Reference Action Type	Flow
Reference Action	Create Amendment Quote
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce for Revenue

Guidelines and Considerations

- The agent can only add assets to a new amendment quote. To create an amendment quote for multiple assets, you must specify all the assets that need to be amended in the initial request. However, you can add more assets or products later to the amendment quote through Transaction Line Editor.
- The agent can't create an amendment quote for an expired asset.

Revenue | Create Initial Quote

Creates a Revenue Cloud quote for a new business from an opportunity. This quote differs from an amendment quote or a renewal quote that modifies or extends an existing business. Sales reps can create multiple quotes for an opportunity.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Foundations.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateInitialQuote
Reference Action Type	Flow
Reference Action	Create Initial Quote
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce for Revenue

Guidelines and Considerations

- Create new business quotes from opportunities. The agent can't create quotes without opportunities.
- Opportunities don't automatically sync to quotes.

Revenue | Create Renewal Quote

Use the Create Renewal Quote action to create a renewal quote for active and renewable assets in Revenue Cloud.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Foundations.

User Permissions Needed

See [Common User Access for Standard Agent Actions](#).

USER PERMISSIONS NEEDED

To execute actions in Employee agents:	See Manage Employee Agent Access
To run flows:	Run Flows

Action Details

API Name	CreateRenewalQuote
Reference Action Type	Flow
Reference Action	Create Renewal Quote
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce for Revenue

Guidelines and Considerations

- By default, the action supports asset-based renewals.
- To enable contract-based renewals, modify the flow associated with this action to accept a contract ID as an input variable.
- To enable renewals from existing renewal opportunities, modify the flow associated with this action to accept an opportunity ID as an input variable.

Revenue | Explain Invoice Line

Provides a detailed, easy-to-understand explanation of a specific invoice line, including the purpose of the charge, the billing reason, and the calculation method.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with [the Revenue Cloud Billing license](#) with the Agentforce Employee Agent add-on. Contact your Salesforce account executive for more information.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	InvoiceLineExplanation
Reference Action Type	Prompt Template
Reference Action	Explain Invoice Line
Does this action execute one or more prompt templates?	No
Required Setup	Setup Agentforce for Revenue

Summary

The Explain Invoice Line action provides a detailed, easy-to-understand explanation for a specific invoice line. Use this action to get a breakdown of any charge; understand its calculation with clear categorization for recurring, one-time, or usage-based items; and view a complete breakdown that includes hidden components, such as proration, credits, and taxes.

Revenue | Find Products

The Find Products agent action searches the product catalog for items that match a user's input query. It returns product names, IDs, and structured details to support conversational product discovery in Agentforce.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions of Revenue Cloud Advanced and Foundations.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

USER PERMISSIONS NEEDED

To execute actions in Employee agents: See [Manage Employee Agent Access](#)

To run flows: Run Flows

Action Details

API Name	FindProducts
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Reference Action Type	Flow
Reference Action	Find Products
Does this action execute one or more prompt templates?	No
Required Setup	Quote Management with Agentforce

Find Products Action

The Find Products agent action uses a search term to locate matching catalog items and return them as a structured product list. It supports conversational queries, lemmatization (plural → singular), and filtering workflows.

Input

- Search Term – A keyword or phrase provided by the user. Plurals are normalized to singular form.

Output

- Product Names – List of product names found.
- Product IDs – 18-character Product2 IDs of matching records.
- Product Details – Structured details for each product.
- Is Successful – Boolean flag for success.
- Error Message – String with error details when the action fails.

Guidelines and Considerations

For best results, [enable indexing](#) and [semantic search](#).

Revenue | Generate Product Description

Generates product descriptions within Product Catalog Management in Revenue Cloud. This action uses product record data to create clear and engaging descriptions, enhancing product discoverability and expediting catalog creation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions of Revenue Cloud that have Product Catalog Management and the Agentforce Employee Agent add-on enabled.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	generateProductDescription
Reference Action Type	Prompt Template
Reference Action	Generate Product Description (generateProductDescription)
Does this action execute one or more prompt templates?	Yes
Required Setup	Set Up Agentforce for Revenue

Revenue | Get Account Assets

Retrieves the active and term-defined renewable assets associated with an account. Active assets are assets with one-time or evergreen product selling models or assets with term-defined product selling models that haven't reached their lifecycle end date. Renewable assets are assets with term-defined product selling models.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Foundations.

User Permissions Needed

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAccountAssets
Reference Action Type	Flow
Reference Action	Get Account Assets
Does this action execute one or more prompt	No

templates?	
Required Setup	Set Up Agentforce for Revenue

Revenue | Get Account Balance

The Get Account Balance agent action retrieves a customer's billing balance for a specific account by summarizing posted invoices, credits, debits, payments, and refunds so that users can quickly understand the net amount due in a conversational billing inquiry.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Revenue Cloud Billing with the Agentforce Employee Agent add-on. It requires Einstein GPT, the Agentforce Service Agent add-on, the Flex Credits Metering add-on, and the Usage Management add-on.

USER PERMISSIONS NEEDED

To execute actions in Employee agents: [See Manage Employee Agent Access](#)

To run flows: [Run Flows](#)

Action Details

API Name	GetAccountBalance
Reference Action Type	Flow
Reference Action	Get Account Balance
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce for Revenue Cloud Set Up Billing Employee Assistance

The Get Account Balance agent action returns a consolidated balance view that can help resolve billing questions quickly.

Input

- Account Context – The account the user is asking about.

Output

- Balance Summary – Summary of the remaining amount due.
- Billing Components – High-level details included in the balance calculation.
- Is Successful – Boolean flag that indicates whether retrieval was successful.
- Error Message – String with error details if the action fails.

Guidelines and Considerations

- The action returns a summary only for accounts where billing data is available.
- Results vary based on the billing information recorded for the account.

Revenue | Get Invoice Line Records

Finds specific invoice lines based on the user's request.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with [the Revenue Cloud Billing license](#) with the Agentforce Employee Agent add-on. Contact your Salesforce account executive for more information.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	InvoiceLineExplanation
Reference Action Type	Flow
Reference Action	Get Invoice Line Records
Does this action execute one or more prompt templates?	No
Required Setup	Setup Agentforce for Revenue

Summary

The Get Invoice Line Records agent action works in the background to identify the correct record before passing it to the ExplainInvoiceLine action for a detailed breakdown. The action identifies the relevant invoice automatically if you're on an invoice page, or it asks for an invoice document number if needed. If multiple invoice lines match your request, the action presents them as a list for you to choose from.

Revenue | Get Invoice Document PDF

The Get Invoice Document PDF agent action retrieves the most recent posted invoice for an account and provides access to its associated document. Users can view or download the latest invoice PDF when it's available.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Revenue Cloud Billing with the Agentforce Employee Agent add-on. It requires Einstein GPT, the Agentforce Service Agent add-on, the Flex Credits Metering add-on, and the Usage Management add-on.

USER PERMISSIONS NEEDED

To execute actions in Employee agents: See [Manage Employee Agent Access](#)

To run flows: Run Flows

Action Details

API Name	GetInvoiceDocumentPDF
Reference Action Type	Flow
Reference Action	Get Invoice Document PDF
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce for Revenue Cloud Set Up Billing Employee Assistance

The Get Invoice Document PDF agent action retrieves the most recent posted invoice for an account and returns its associated document. When a PDF is available, the action provides a link that users can select to download the invoice.

Input

- Account Context – The account the user wants the latest invoice for.

Output

- Latest Invoice Record – The most recent posted invoice.
- Invoice Document Link – Downloadable link to the invoice PDF, when available.
- Is Successful – Boolean flag that indicates whether retrieval was successful.

- Error Message – String with error details if the action fails.

Guidelines and Considerations

- A PDF is generated only if the invoice document exists and document generation is enabled.
- The action supports direct requests such as “Show me my latest invoice” or “Download my most recent bill.”

Revenue | Retrieve Next Due Payment

The Retrieve Next Due Payment agent action identifies the next upcoming payment for an account by returning the earliest due date and the total amount due so that users can quickly understand what a customer needs to pay next.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Revenue Cloud Billing with the Agentforce Employee Agent add-on. It requires Einstein GPT, the Agentforce Service Agent add-on, the Flex Credits Metering add-on, and the Usage Management add-on.

USER PERMISSIONS NEEDED

To execute actions in Employee agents: See [Manage Employee Agent Access](#)

To run flows: [Run Flows](#)

Action Details

API Name	RetrieveNextDuePayment
Reference Action Type	Flow
Reference Action	Retrieve Next Due Payment
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce for Revenue Cloud Set Up Billing Employee Assistance

The Retrieve Next Due Payment agent action reviews outstanding billing items and identifies the next payment due for an account. It returns the due date and corresponding amount to help users answer questions related to the billing.

Input

- Account Context – The account the user wants the details for.

Output

- Next Payment Due Date – The earliest upcoming due date.
- Amount Due – Total amount associated with that due date.
- Supporting Details – Invoice identifiers or billing items contributing to the amount.
- Is Successful – Boolean flag that indicates whether retrieval was successful.
- Error Message – String with error details if the action fails.

Guidelines and Considerations

- The action returns a result only when outstanding amounts have due dates.
- If no payments are due, the action indicates that no upcoming payment was found.

Revenue | Generate Payment Plan Details

The Generate Payment Plan Details agent action returns the payment installment schedule for an invoice so that users can understand how an invoice is paid over time, including installment amounts, dates, and statuses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Revenue Cloud Billing with the Agentforce Employee Agent add-on. It requires Einstein GPT, the Agentforce Service Agent add-on, the Flex Credits Metering add-on, and the Usage Management add-on.

USER PERMISSIONS NEEDED

To execute actions in Employee agents: See [Manage Employee Agent Access](#)

To run flows: Run Flows

Action Details

API Name	GeneratePaymentDetails
Reference Action Type	Flow
Reference Action	Generate Payment Plan Details
Does this action execute one or more prompt templates?	No

Required Setup	Set Up Agentforce for Revenue Cloud Set Up Billing Employee Assistance
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The Generate Payment Plan Details agent action retrieves the payment plan for a specific invoice. It returns a structured view of installment dates, amounts, and statuses to help explain how the invoice is scheduled for payment.

Input

- Invoice Reference – The invoice the user is asking about.

Output

- Payment Plan Summary – Installment details, including dates, amounts, and statuses.
- Is Successful – Boolean flag that indicates whether retrieval was successful.
- Error Message – String with error details if the action fails.

Guidelines and Considerations

- The action returns results only for invoices that have an associated payment plan.
- If the invoice reference is incomplete or invalid, the agent topic can request additional details.

Revenue | Get Rule-Based Product Recommendations (Beta)

The Get Rule-Based Product Recommendations agent action returns recommended products for a quote based on configuration rules in Product Catalog Management (PCM). The action evaluates the products already added to a quote, applies relevant recommendation rules, and returns a list of recommended product IDs and names that can be used in Product Selection workflows in Agentforce.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Foundations.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

USER PERMISSIONS NEEDED

To execute actions in Employee agents: See [Manage Employee Agent Access](#)

To run flows: Run Flows

Action Details

API Name	GetProductDetails
Reference Action Type	Flow
Reference Action	Get Rule-Based Product Recommendations
Does this action execute one or more prompt templates?	No
Required Setup	<p>Quote Management with Agentforce</p> <p>Set Up Product Configurator</p> <p>Manage Qualification Rules for Products in Agentforce Revenue Management</p>

The Get Rule-Based Product Recommendations agent action can return recommendations for the entire quote or for a specific quote line item, depending on the input provided.

The action returns product IDs, product names, and a success flag that allows the agent to present recommendations and support follow-up actions, such as adding recommended products to a quote.

Input

- Quote ID – The ID of the quote that the action evaluates. This value is required.
- Quote Line Item ID – The ID of a specific product on the quote. If you provide this value, recommendations are filtered based on that line item. This value is optional.

Output

- Product IDs – A list of Product2 IDs that are recommended for the quote.
- Product Names – The names of the recommended products.
- Product Details – A structured representation of the recommended products that includes qualification results.
- Is Successful – A Boolean flag indicating whether the action ran successfully.
- Error Message – A string describing the error if the action fails.

Guidelines and Considerations

- When the action is run, the agent shows up to five recommended products.
- Products that don't meet qualification rules are excluded from the results.
- Recommendations are returned based on configuration rules only. If a quote has configuration errors, the agent doesn't show rule-based recommendations or an error message.
- Partner users can't use this action. Only admin users can access it.
- If admin users don't see the Get Rule-Based Product Recommendations action in Agent Builder, [add](#)

the action or [remove](#) and [add](#) the Product Selection topic.

Revenue | Get Product Details

The Get Product Details agent action retrieves structured details for a list of product IDs so that users can refine results and apply customer-specific filters during a Product Selection conversation in Agentforce.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Foundations.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

USER PERMISSIONS NEEDED

To execute actions in Employee agents: See [Manage Employee Agent Access](#)

To run flows: Run Flows

Action Details

API Name	GetProductDetails
Reference Action Type	Flow
Reference Action	Get Product Details
Does this action execute one or more prompt templates?	No
Required Setup	Quote Management with Agentforce

The Get Product Details agent action uses a collection of product IDs to return attributes that can be used to answer follow-up queries or apply filters, such as waterproof rating, protocol support, or warranty period.

Input

- Product IDs – A list of 18-character Product2 record IDs.

Output

- Product Details – Structured list of details for the specified products.

- Is Successful – Boolean flag that indicates whether retrieval was successful.
- Error Message – String with error details when the action fails.

Guidelines and Considerations

- Always use this action after Find Products when you want to filter results.
- For best results, [enable indexing](#) and [semantic search](#).

Revenue | Get Product Selling Model for Products

Retrieves the default product selling model associated with a product. Use this action when you add a product to a quote.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Foundations.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	GetProdSelModelForPrdct
Reference Action Type	Flow
Reference Action	Get Product Selling Model for Products
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce for Revenue

Guidelines and Considerations

The action also returns the list of products that don't have a default product selling model. To add products by using the Add Quote Line Item to Quote action, associate them with a default product selling model.

Revenue | Get Usage Details

Gets the details of the consumption overages for up to five usage resources associated with an account by using the account ID.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Revenue Cloud Billing with the Agentforce Employee Agent add-on. It requires Einstein GPT, the Agentforce Service Agent add-on, the Flex Credits Metering add-on, and the Usage Management add-on.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	GetUsageDetails
Reference Action Type	Prompt
Reference Action	Get Usage Details
Does this action execute one or more prompt templates?	Yes
Required Setup	Quote Management with Agentforce

Guidelines and Considerations

- You can only request up to five accounts in an agent request.
- The agent supports only anchor products with usage resources of type usage.
- The agent provides the overage details in usage resource's unit of measure and not in the equivalent amount that is to be billed. For example, for the Data Storage usage resource, the overages are returned based on the overconsumed data in GBs.
- The agent can create a quote with only Pack usage type products.
- When you use the agent to check for overages, and then ask the agent to create a quote for the overconsumed usage resource, you must add the term usage resource in the request. For example, if the account has over-consumed 50 GB data storage, then you must say, create a quote for the account Acme with the data storage usage resource.
- The overage details that the agent returns is prior to liable summary generation. After the liable summaries are generated for a period, overage details will not be returned.

Get Usage Details and Prompt Template

The Get Account Usage Details agent action uses Get Account Usage Details prompt template to retrieve consumption details of the usage resources associated with accounts.

The action passes a required input parameter Account IDs. The parameter includes the list of comma-delimited account IDs whose usage details are to be fetched.

Revenue | Query Contract Document

Finds and retrieves relevant information from a contract document based on the user's question.

Answers questions related to contract documents, including terms, obligations, and clauses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Sales, Agentforce for Platform, or Agentforce for Service add-on, Revenue Cloud Advanced, or Agentforce for Industries (X).

USER PERMISSIONS NEEDED

To run this action:

Data Cloud Admin

AND

CLM Admin User

AND

Contracts AI User

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	QueryContractDocument
Reference Action Type	Prompt Template
Reference Action	clm_ai__AnswerWithContractDocument
Does this action execute one or more prompt templates?	Yes

Query Contract Document and Prompt Template

The Query Contract Document agent action uses Contract Q&A prompt template to answer questions about contract document content. The action uses the contract document currently in focus to process and return relevant information.

The action passes two required, non-editable inputs to the chosen template:

- Query – the user's question.
- Contract ID – the ID of the contract record to analyze.
- Chunk Limit - the limit of the maximum number of chunks to be retrieved based on user query

Customization options: You can modify your prompt template instructions to create a new custom version and activate it to customize the template. See [Customize Prompt Template for Contract Search](#).

Chain Actions Together

You can combine Query Contract Document action with [Draft or Revise Email](#) action to streamline how users extract contract insights and communicate them. For instance, an AI agent can help a user locate terms and immediately turn that into an email for internal or external stakeholders. Users can either include both actions in a single instruction or run them in sequence.

Single Request:

I need to search and obtain contract records for Ursa Major Solar. They deal with the supply of paper packaging materials and are based in New Delhi, India. They're facing issues due to a paper shortage from their supplier, Cloud Kicks in China. Can you fetch the relevant contracts?

Multiple Requests:

Rep: What exactly does the delivery of paper packaging materials entail? Are there specifications or quality standards to adhere to for delivery?

Agent: Scope of Services: Cloud Kicks is obligated to deliver paper packaging materials as per the terms of the agreement. Specific quality standards or material details are not mentioned, so these might need further clarification outside the contract. Delivery Timeline: Deliveries must be completed within three (3) days from the date of the agreement, subject to the conditions stated in the contract.

Rep: What is the payment structure and method listed in the document -

Agent: The total price for the delivery services is \$1 million. Ursa Major Solar must make payment within thirty (30) days of receiving the invoice.

Rep: What if Cloud Kicks fails to deliver in time and what is the mitigation for that?

Agent: Force Majeure Impact: Both parties are excused from obligations if events beyond their control, such as severe weather, terrorism, or acts of God, prevent performance. The affected party must notify

the other party promptly and provide an estimate of the delay's duration. **Mitigating Delays:** If a delay occurs due to force majeure, Cloud Kicks must take all reasonable measures to minimize the impact on delivery.

Rep: What happens if Ursa Major Solar decides to file a litigation in case of any disputes due to failure of delivery?

Agent: The agreement is governed by the laws of Texas, USA, which may influence interpretation and enforcement in legal disputes.

Rep: Can you please compile and send all the details that we discussed above and send it to the legal attorney assigned for this account?

Agent: Sure, let me show you the preview and then we can send it.

Guidelines and Considerations

Before using this action, make sure you've completed the Contract Search setup and understand any constraints. See [Configure Contract Search](#) and [Contract Search Limitations](#).

Revenue | Query Quote Line Items

Gets quote line item records for specified product IDs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Foundations.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	QueryQuoteLineItemRecords
Reference Action Type	Flow
Reference Action	Query Quote Line Items
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce for Revenue

Guidelines and Considerations

- You can query up to 50 quote line items in a request.
- If many quote line items have a common name, you can share the quote line item ID in the request.

Revenue | Summarize Contract Document

The Summarize Contract Document agent action calls Summarize Contract prompt templates of type Document Summary to create clear and business-focused contract overviews.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Sales, Agentforce for Platform, or Agentforce for Service add-on, Revenue Cloud Advanced, or Agentforce for Industries (X).

USER PERMISSIONS NEEDED

To run this action:

Data Cloud Admin

AND

CLM Admin User

AND

Contracts AI User

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeContractDocument
Reference Action Type	Prompt Template
Reference Action	clm_ai_ContractDocumentSummary
Does this action execute one or more prompt templates?	Yes

Summarize Contract Documents and Prompt Templates

The Summarize Contract Document agent action uses Summarize Contract prompt templates of type

Document Summary to generate clear, business-focused overviews. It can summarize the entire contract or focus on specific areas—such as clauses, financial terms, durations, and obligations—based on the user's query.

The action passes two required, non-editable inputs to the chosen template:

- Query – the user's question.
- Contract ID – the ID of the contract record to analyze.
- Chunk Limit - the limit of the maximum number of chunks to be retrieved based on user query

The prompt template returns a rich-text summary in the Contract Document Summary output variable.

Customization options: In the default summary, if you want some sections of the contract document to be present which is not your template, you can customize the prompt template and create a new version of the prompt template. You can modify your prompt template instructions to create a new custom version and activate it to customize the template. See [Customize Prompt Template for Contract Search](#).

Guidelines and Considerations

Before using this action, make sure you've completed the Contract Search setup and understand any constraints. See [Configure Contract Search](#) and [Contract Search Limitations](#).

Revenue | Update Quote Details

Updates the fields in a quote.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Foundations.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	UpdateQuoteDetails
Reference Action Type	Flow
Reference Action	Update Quote Details
Does this action execute one or more prompt	No

templates?	
Required Setup	Set Up Agentforce for Revenue

Guidelines and Considerations

The agent is sensitive to spelling errors and prompts you for the right input if there is a mismatch.

Revenue | Update Quote Line Item Details

Updates the fields in a quote line item.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud Advanced and Foundations.

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

USER PERMISSIONS NEEDED

To execute actions in Employee agents: [See Manage Employee Agent Access](#)

To run flows: [Run Flows](#)

Action Details

API Name	UpdateQuoteLineItemDetails
Reference Action Type	Flow
Reference Action	Update Quote Line Item Details
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce for Revenue

Guidelines and Considerations

The agent is sensitive to spelling errors and prompts you for the right input if there is a mismatch.

Retail Execution Visit Assistant | Get Retail Execution Account Performance Data

Calculates total revenue, minimum and maximum order values, and identifies top N% and bottom N% selling products based on order quantities. The action calculates product metrics data from preorders, deliveries, and invoices that are ready or released, optionally within a date criteria.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Agentforce for Consumer Goods add-on or included in Agentforce 1 Consumer Goods Edition. Requires each user to have the Agentforce for Consumer Goods add-on to access the action.

USER PERMISSIONS NEEDED

To use Retail Execution	Assign one of the Retail Execution user permissions. See Permission Sets From Summer '24
To use Retail Execution Agentforce action	Access CGCloud AI Assistive Agent
For additional permissions, see User Access for Standard Agent Actions .	

Action Details

API Name	GetReAccountPerformanceData
Action Type	Standard Action
Reference Action	Get Retail Execution Account Performance Data
Reference Action Type	Invocable Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Setup in Retail Execution

See Also

[Agent Topic: Account Performance](#)

Retail Execution Visit Assistant | Get Retail Execution Customer Tasks By Account

Gets customer tasks that are ready or released for an account optionally within a date range.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Consumer Goods add-on or included in Agentforce 1 Consumer Goods Edition. Requires each user to have the Agentforce for Consumer Goods add-on to access the action.

USER PERMISSIONS NEEDED

To use Retail Execution	Assign one of the Retail Execution user permissions. See Permission Sets From Summer '24
To use Retail Execution Agentforce action	Access CGCloud AI Assistive Agent
For additional permissions, see User Access for Standard Agent Actions .	

Action Details

API Name	GetReCustomerTasksByAccount
Action Type	Standard Action
Reference Action	Get Retail Execution Customer Tasks By Account
Reference Action Type	Invocable Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Setup in Retail Execution

See Also

[Agent Topic: Account Compliance](#)

[Agent Topic: Last Visit Summary](#)

Retail Execution Visit Assistant | Get Retail Execution Visits By Account

Gets completed visits for the account based on the preconfigured visit types in Retail Execution. The action supports two scope modes: returning only the most recent completed visit or returning all completed visits within a specified date range. Each retrieved visit includes associated details of store audits, product surveys, and asset audits.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Consumer Goods add-on or included in Agentforce 1 Consumer Goods Edition. Requires each user to have the Agentforce for Consumer Goods add-on to access the action.

USER PERMISSIONS NEEDED

To use Retail Execution	Assign one of the Retail Execution user permissions. See Permission Sets From Summer '24
To use Retail Execution Agentforce action	Access CGCloud AI Assistive Agent
For additional permissions, see User Access for Standard Agent Actions .	

Action Details

API Name	GetReVisitsByAccount
Action Type	Standard Action
Reference Action	Get Retail Execution Visits By Account
Reference Action Type	Invocable Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Setup in Retail Execution

See Also

- [Agent Topic: Account Compliance](#)
- [Agent Topic: Last Visit Summary](#)
- [Agent Topic: Product Upsell](#)

Retail Execution Visit Assistant | Get Retail Execution Orders By Account

Gets order information, including order header details and corresponding detailed order item data for each order. The action gets ready or released preorders, deliveries, and invoices data for the account, optionally within a date range.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Consumer Goods add-on or included in Agentforce 1 Consumer Goods Edition. Requires each user to have the Agentforce for Consumer Goods add-on to access the action.

USER PERMISSIONS NEEDED

To use Retail Execution	Assign one of the Retail Execution user permissions. See Permission Sets From Summer '24
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To use Retail Execution Agentforce action	Access CGCloud AI Assistive Agent
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For additional permissions, see [User Access for Standard Agent Actions](#).

Action Details

API Name	GetReOrdersByAccount
Action Type	Standard Action
Reference Action	Get Retail Execution Orders By Account
Reference Action Type	Invocable Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Setup in Retail Execution

See Also

[Agent Topic: Account Compliance](#)

[Agent Topic: Last Visit Summary](#)

[Agent Topic: Product Upsell](#)

Retail Execution Visit Assistant | Get Retail Execution Orders By Visit

Gets order information, including order header details and corresponding detailed line-item (order item) data for each order. The action gets ready or released preorders, deliveries, and invoices data for the visit, optionally within a date range.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Consumer Goods add-on or included in Agentforce 1 Consumer Goods Edition. Requires each user to have the Agentforce for Consumer Goods add-on to access the action.

USER PERMISSIONS NEEDED

To use Retail Execution	Assign one of the Retail Execution user permissions. See Permission Sets From Summer '24
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USER PERMISSIONS NEEDED

'24

To use Retail Execution Agentforce action

Access CGCloud AI Assistive Agent

For additional permissions, see [User Access for Standard Agent Actions](#).**Action Details**

API Name	GetReOrdersByVisit
Action Type	Standard Action
Reference Action	Get Retail Execution Orders By Visit
Reference Action Type	Invocable Action
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Setup in Retail Execution

See Also[Agent Topic: Last Visit Summary](#)**Sales | Add Record to Cadence**

Associates a prospect with a cadence directly from Agentforce.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.**USER PERMISSIONS NEEDED**

To use Add Record to Cadence:

Sales Engagement User

See [Common User Access for Standard Agent Actions](#).**Action Details**

API Name	AddRecordToCadence
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Reference Action Type	Standard Action
Reference Action	Add Record to Cadence (addRecordToCadence)
Does this action execute one or more prompt templates?	No

Considerations

- Each prospect can be associated with a maximum of five cadences.
- Prospects can be associated with only cadences that are active.

Sales | Create a Label

Creates a personalized label to contextually group and organize records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales add-on

USER PERMISSIONS NEEDED

To use Create a Label:	Create a Label
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See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateALabel
Reference Action Type	Standard Action
Reference Action	Create a Label (createLabel)
Does this action execute one or more prompt templates?	No

Considerations

Users are limited to creating a maximum of 200 labels.

Sales | Create a Sales Record

Compares the customer's entered code with the generated verification code from the Send Verification Code agent action to determine if the customer is verified.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

User Permissions Needed	
Set Up Inbound Lead Generation	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	Create Sales Record
Reference Action Type	Flow
Reference Action	<ul style="list-style-type: none">• Create an Inbound Lead Record• Create an Inbound Contact Record• Create an Inbound Person Account Record
Does this action execute one or more prompt templates?	No
Required Setup	Set up Inbound Lead Generation

Guidelines and Considerations

- Records are only created if the agent is able to successfully collect all of the required fields. If a required field is missing, record creation will fail.
- Avoid asking for more than five fields of information.

Sales | Create a To-Do

Create tasks for follow-up or assignments to complete, helping sellers manage their work efficiently.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateAToDo
Reference Action Type	Standard Action
Reference Action	<p>Create a To-Do</p> <p>(createAToDo)</p>
Does this action execute one or more prompt templates?	No

Sales | Create Close Plan

Generates a sales plan to help sales reps close an opportunity by its target date.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

To use Create Close Plan:

Close Plan

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateClosePlan
Reference Action Type	Standard Action
Reference Action	Create Close Plan (createClosePlan)
Does this action execute one or more prompt templates?	Yes

Considerations

The Create Close Plan action requires the activation of both [Einstein Activity Capture \(EAC\)](#) and [Activity 360](#).

Sales | Explore Conversation

Answers a user's questions about a voice or video call based on the contents of the call transcript. For example, if the user enters, "What was the customer sentiment on the call?" in the Einstein panel, the action delivers an answer based on the customer's language in the call transcript.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on and Einstein Conversation Insights. Requires each user to have the Agentforce or Einstein add-on to access the action.

User Permissions Needed	
To use Call Explorer:	Einstein Sales Call Explorer
See Common User Access for Standard Agent Actions .	

Action Details

API Name	ExploreConversation
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

templates?	
Required Setup	Add Call Explorer to Voice Calls and Video Calls

Considerations

- This feature requires access to video or voice call records.
- For more information, see [Considerations for Call Explorer](#).

Sales | Find Contact Interactions

Identifies the list of opportunities or an account that a specific contact has influenced.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

To use Find Contact Interactions: Review Buying Committee

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindContactInteractions
Reference Action Type	Standard Action
Reference Action	ReviewBuyingCommittee (reviewBuyingCommittee)
Does this action execute one or more prompt templates?	No

Sales | Find Past Collaborators

Leverages insights from Einstein Activity Capture to identify individuals with past collaborative ties, aiding in securing introductions to relevant parties in ongoing or future deals.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

To use Find Past Collaborators:

Find Past Collaborators

AND

Automatic Activity Capture

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindPastCollaborators
Reference Action Type	Standard Action
Reference Action	Find Past Collaborators (findPastCollaborators)
Does this action execute one or more prompt templates?	No

Considerations

Premium Einstein Activity Capture (EAC) is a required feature for the Find Past Collaborators action to work. The insights from EAC drive the identification of past collaborators.

Sales | Find Similar Interactions

Searches interaction records by channel or related terms and generates an engagement summary for specified or all channels, including case, chat, email, surveys, and voice.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Data Cloud enabled, and the Customer Experience Intel and Einstein GPT Copilot add-ons

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindSimilarInteractions
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes
Required Setup	Set Up Draft Case Response, Find Similar Cases, and Find Similar Interactions Agent Actions

Find Similar Interactions and Prompt Templates

This agent action creates a summarized list of similar or related interactions across the requested channels.

Guidelines and Considerations

The Find Similar Interactions action requires the activation of Customer Experience Intelligence.

Sales | Find Similar Opportunities

Searches for and returns a list of opportunities that are similar to, but not duplicates of, a specified Salesforce opportunity. An explanation of the similarities is returned with each opportunity record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindSimilarOpportunities
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Considerations

- Matched opportunities have a status of Closed Won, a close date within 12 months of today, and aren't deleted. If your Salesforce org has record types enabled, only opportunities with the same record type as the requested opportunity are shown.
- Matched opportunities are sorted first by relevance and then by close date.
- Only opportunities that the user has Read access for are shown in the matched opportunities list.
- Opportunities that were opened and closed within 24 hours, or that were created with a status of Closed Won, aren't shown in the matched opportunities list.
- Users can't customize the criteria for relevance. Relevance is based on similar:
 - Field values (Record Type, Type, Owner, and Lead Source).
 - Related records (Competitors, Products, Accounts, Contacts, and Partners).

See Also

[User Interface API Developer Guide: All Supported Objects](#)

Sales | Get Activities Timeline

Retrieves a list of all CRM activities associated with a record during the specified time frame. The list can include past and future activities. The action is exposed through Flows, making it available for automation.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetActivitiesTimeline
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Considerations

- The action searches for activities based on the object specified in the user's request, not based on the activity owner. For example, you can't request all the activities associated with the user Sally Jones.
- The action retrieves activities directly associated with the specified record. For example, if a user requests activities for the Acme account, the action returns those activities, but it doesn't include activities for an opportunity related to the Acme account. If the user wants to view activities for the account and the related opportunity, they must specify both objects in their request.
- The total output of the action is limited to 15,000 tokens. If the limit is exceeded, some activities are truncated.
- The limit for text fields is 450 words. If the limit is exceeded, some text is truncated.

Sales | Get Activity Details

Provides a brief summary of an activity, including an overview of its content (such as an email or a call summary) and other relevant details. Valid activity types are calls, emails, events, or tasks.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetActivityDetails
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Considerations

For events, the action does not retrieve the meeting recipients.

Sales | Get Conversation Intelligence

Gets intelligence information about a voice or video call, including any insights and a conversation summary if one is available.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on and Einstein Conversation Insights. Requires each user to have the Agentforce or Einstein add-on to access the action.

User Permissions Needed	
To use Einstein Conversation Insights:	Sales Engagement Conversation Insights, Sales Cloud Bundle Included, Einstein Conversation Insights Included, OR Conversation Insights for Sales permission set

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetConversationIntelligence
Reference Action Type	Standard Action

Considerations

- This feature requires access to video or voice call records.

Sales | Get Conversation Transcript

Gets a transcript for a voice or video call. This can be used to automate updates to records based on conversation data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on and Einstein Conversation Insights. Requires each user to have the Agentforce or Einstein add-on to access the action.

User Permissions Needed	
To use Einstein Conversation Insights:	Sales Engagement Conversation Insights, Sales Cloud Bundle Included, Einstein Conversation Insights Included, OR Conversation Insights for Sales permission set
See Common User Access for Standard Agent Actions .	

Action Details

API Name	GetConversationTranscript
Reference Action Type	Standard Action

Considerations

- The transcript must be available in order to retrieve it.
- The user calling the action must have Read access to the voice or video call.
- Video calls can retrieve the raw vendor transcript, but voice calls can retrieve the processed transcript only.

Sales | Get Fields to Create Sales Record

Collect the fields that need user-inputted values in order to create a sales record. Also outputs if the agent should create a lead, contact, or person account record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

User Permissions Needed	
Set Up Inbound Lead Generation	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	GetFieldsToCreateSalesRecord
Reference Action Type	Invocable Action
Reference Action	Get Lead Generation Record Fields
Does this action execute one or more prompt templates?	No
Required Setup	Set up Inbound Lead Generation

Sales | Get Forecast Guidance

Gathers information about how a sales rep is tracking toward meeting their Committed and Most Likely quota for the current forecast period. The output includes the seller's forecast amount, a list of any deals at risk, and why they're considered at risk.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetForecastGuidance
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	If you haven't set up Salesforce Forecasting, see Set Up Salesforce Forecasting .

Considerations

- The user interacting with this action can view forecast guidance information only for users they have

- access to in their forecast hierarchy.
- Outputs can vary depending on how forecasting is set up.
 - This action works only for Opportunity Revenue forecast types with these properties.
 - Measure: Opportunity Amount
 - Date: Opportunity Close Date
 - Hierarchy: User
 - Product Family: None
 - The last viewed forecast type dictates the action's output.
 - This action provides information only for the current period.

Sales | Get Product Pricing

Gets the pricing information of a product, including relevant historical sale price data from previous won deals involving the same product.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

To use Get Product Pricing:	Get Product Pricing
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See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetProductPricing
Reference Action Type	Standard Action
Reference Action	Get Product Pricing (getProductPricing)
Does this action execute one or more prompt templates?	No

 **Note** The Get Product Pricing action is not available to orgs that have Revenue Cloud or NextGen Pricing, or if the `CorePricingAccess` org permission is enabled.

Considerations

- A seller can get historical sale price data only from the opportunity records that they can access.
- To extract historical sale price data, up to 100 deals won in the last year are considered.

Sales | Identify Contact Role

Identifies the role, significance, or impact of a contact in influencing the opportunity or account status. This action also assesses how that contact affects the outcome of a deal, initiative, or account.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

To use Identify Contact Role: Review Buying Committee

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	IdentifyContactRole
Reference Action Type	Standard Action
Reference Action	ReviewBuyingCommittee (reviewBuyingCommittee)
Does this action execute one or more prompt templates?	No

Considerations

To use this action on an account, make sure you turn on Auto Contact Enrichment or Relationship Map.

Sales | Identify Key Contacts

Identifies key contacts associated with an account or opportunity. A key contact is someone who can influence, obstruct, impede, or decide a deal, or is involved in the outcome of the deal.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

To use Identify Key Contacts: Review Buying Committee

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	IdentifyKeyContacts
Reference Action Type	Standard Action
Outputs	contacts
Does this action execute one or more prompt templates?	No

Considerations

To use this action on an account, make sure you turn on Auto Contact Enrichment or Relationship Map.

Sales | Label a Record

Assigns personalized labels to records. Users can tag records based on meaningful attributes, retrieve those records as a group, and act on them.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

To use Label a Record: Label a Record

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	LabelARecord
Reference Action Type	Standard Action
Reference Action	Label a Record (applyUserDefinedLabel)
Does this action execute one or more prompt templates?	No

Considerations

- Users can assign up to 20 labels to each record.
- Each label can be assigned to a maximum of 500 records.

Sales | Log a Call

Logs a call with a customer as a task, which can include additional details about the call, such as the date, time, and purpose. The logged call appears in the seller's Activity Timeline.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	LogACall
Reference Action Type	Standard Action
Reference Action	Log a Call (logACall)

Does this action execute one or more prompt templates?	No
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Considerations

- You can't log future-dated calls.

Sales | 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.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

To view opportunity records: Read on Opportunity

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	PrioritizeOpportunities
Reference Action Type	Prompt Template
Reference Action	PrioritizeOpportunities
Does this action execute one or more prompt templates?	Yes

Prioritize Opportunities and Prompt Templates

This agent action uses the Prioritize Opportunities prompt template. The prompt template uses the Get Opportunity Details flow, which calls the Get Record Prioritization Data standard invocable action to prioritize opportunity records.

Considerations

- The action evaluates and prioritizes only opportunities you own.
- The action doesn't filter opportunities by close date automatically. If you want to specify a close date or close date range, include it in your utterance.
- To change the prompt criteria or customize the prompt template based on your company's needs, create a prompt template of the Record Prioritization type.

Sales | Research Account

Conducts external research and generates a summary of findings about the company on a business account. The output depends on the user's research question and can include information about the company's structure, business model, revenue, and competitors.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions** with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

To view account records: Read on Account

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ResearchAccount
Action Type	Standard
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes

Considerations

- You can use Research Account only on business accounts.
- Research Account requires you to disable data masking for Company Name.
- The large language model (LLM) that generates the output doesn't always use the most recent information about the company you're researching. Always verify the results provided before using them.

Sales | Return Calendar Link

Adds a calendar link to the agent's response, allowing web prospects quickly schedule a meeting that is convenient for them.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

Set Up Inbound Lead Generation

Inbox Scheduling Proxy Users

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ReturnCalendarLink
Reference Action Type	Flow
Reference Action	ReturnCalendarLink
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- This action requires Salesforce Inbox to be enabled.

Sales | Review My Day

Provides an overview of the seller's daily agenda, including pending tasks, meetings, leads, opportunities, and how the seller is tracking against their sales quota. Only the top three leads and opportunities that require your attention are shown. The leads are sorted in descending order of the annual revenue. The opportunities are sorted in ascending order of the Close Date. A maximum of three open tasks that the seller owns are shown in descending order of priority.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

To use Review My Day: Review My Day

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ReviewMyDay
Reference Action Type	Standard Action
Reference Action	Review My Day (reviewMyDay)
Does this action execute one or more prompt templates?	Yes

Review My Day and Prompt Templates

This agent action calls the Review My Day standard invocable action, which uses prompt templates of the type Review My Day to generate a daily brief. The specific prompt template calls a standard flow to fetch data and generate an overview of the day for the logged-in user. If an overridden flow exists, the custom (overridden) flow is prioritized over the Salesforce-provided (file-based) flow.

! **Important** If the standard flow is customized, the seller must update the instructions in the corresponding prompt template. It's important to update the prompt template to make sure that the LLM generates responses based on the output data provided by the custom flow.

Sales | Send Meeting Request

Creates an email draft to request a meeting with the recipient, with three possible time slots, a link to view the slots on a new page, or a link to the sender's calendar where they can pick a slot to schedule a meeting.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with an Agentforce or Einstein for Sales, Service, Platform, or Industry add-on. Requires each user to have the Agentforce or Einstein add-on to access the action.

USER PERMISSIONS NEEDED

To use Send Meeting Request:

Send Meeting Request

AND

Use Inbox

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SendMeetingRequest
Reference Action Type	Standard Action
Reference Action	Send Meeting Request (sendMeetingRequest)
Does this action execute one or more prompt templates?	Yes
Required Setup	Connect Email and Calendar

Send Meeting Request and Prompt Templates

This agent action calls the Send Meeting Request invocable action that uses internal-only prompt templates to generate a meeting request email. The email contains three meeting time slot links, a link to view the meeting slots on a new page, and a link to the seller's calendar.

Considerations

- To let reps access the feature in Gmail, Outlook or Exchange, set up the corresponding integration.
- The recipient can click one of the options to immediately book a slot. If your calendar fills up in the meantime, when the recipient selects a meeting slot, they see a message that the selected slot is already booked.
- A user can't send an email directly from the Agentforce panel. They can open the draft in the Salesforce email composer or select **Copy** to paste it into a client of their choosing.
- In the email composer, if the user replaces the original recipient or adds new recipients, all links are automatically removed from the email draft.

Sales | Send Verification Email

Generates and sends a verification code to a prospect's email address to verify them.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

Set Up Inbound Lead Generation

Inbox Scheduling Proxy Users

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SendVerificationEmail
Reference Action Type	Flow
Reference Action	Send Verification Code
Does this action execute one or more prompt templates?	No
Required Setup	One-time password authentication must be enabled in Inbound Lead Generation.

Guidelines and Considerations

- Customer verification is optional during inbound lead generation.

Sales | Suggest Next Step for Opportunity

Identifies and suggests a value for the Next Step field on an opportunity. This action is intended for use with Agentforce Pipeline Management.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Sales or Agentforce for an Industry add-on, 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 use a Sales Management agent:	Use Agentforce Sales Management
To use Agentforce Pipeline Management:	Use Agentforce Pipeline Management permission set
See Common User Access for Standard Agent Actions .	

Action Details

API Name	SuggestOppNextStep
Reference Action Type	Prompt Template
Reference Action	recommendNextStepForOpp
Does this action execute one or more prompt templates?	Yes
Required Setup	Set Up Agentforce Pipeline Management

Suggest Next Step for Opportunity and Prompt Templates

This agent action calls the Recommend Next Step for Opportunity prompt template, which generates a Next Step field update suggestion for an opportunity based on information such as call transcripts, emails, and notes.

You can clone and modify the Recommend Next Step for Opportunity prompt template to create a field update suggestion action for custom or other opportunity fields

Guidelines and Considerations

- In the Agentforce panel, this action can only be initiated through the Sales Management agent.
- If you remove this action, the agent can't give suggestions for updating the Next Step field on an opportunity.

See Also

[Agentforce Pipeline Management](#)

Sales | Suggest Stage for Opportunity

Identifies and suggests the appropriate stage for an opportunity. This action is intended for use with Agentforce Pipeline Management.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Sales or Agentforce for an Industry add-on, 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 use a Sales Management agent:	Use Agentforce Sales Management
To use Agentforce Pipeline Management:	Use Agentforce Pipeline Management permission set
See Common User Access for Standard Agent Actions .	

Action Details

API Name	SuggestOppStage
Reference Action Type	Prompt Template
Reference Action	recommendStageForOpp
Does this action execute one or more prompt templates?	Yes
Required Setup	Set Up Agentforce Pipeline Management

Suggest Stage for Opportunity and Prompt Templates

This agent action calls the Recommend Stage for Opportunity prompt template, which generates a Stage field update suggestion for an opportunity based on information such as call transcripts, emails, and notes.

You can't clone and modify the Recommend Stage for Opportunity prompt template. Customizing prompt templates for picklist fields, such as Stage, isn't supported.

Guidelines and Considerations

- In the Agentforce panel, this action can only be initiated through the Sales Management agent.
- If you remove this action, the agent can't give suggestions for updating the Stage field on an opportunity.

See Also

[Agentforce Pipeline Management](#)

Sales | Verify Sales Customer

Compares the customer's entered code with the generated verification code from the Send Verification Code agent action to determine if the customer is verified.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

Set Up Inbound Lead Generation

Inbox Scheduling Proxy Users

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	VerifySalesCustomer
Reference Action Type	Flow
Reference Action	Verify Sales Customer
Does this action execute one or more prompt templates?	No
Required Setup	Set up Inbound Lead Generation

Guidelines and Considerations

- Customer verification is optional during inbound lead generation.

Sales | Coach | Give Feedback on Needs Analysis Stage

This agent action provides a sales representative with feedback on a sales pitch for an opportunity.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Agentforce Sales Coach: Use Agentforce Sales Coach

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GiveOppNeedsAnalysisFdbk
Reference Action Type	Prompt Template
Reference Action	sales_coach_agent_impl__getNeedsAnalysisFeedback
Does this action execute one or more prompt templates?	Yes
Required Setup	Setup Agentforce Sales Coach

Sales Coach Agent: Give Feedback on Needs Analysis Stage and Prompt Templates

This copilot action calls the Get Needs Analysis Stage Feedback prompt template. To analyze a sales rep's pitch, the template provides the Sales Coach agent with CRM data from the user and the opportunity record. The template also includes questions to assess how well the sales rep understands the deal and prospect's needs. The information is then used to generate feedback for the sales rep.

Considerations

If you remove this action, Sales Coach agent can't analyze sales pitches for opportunities in the Needs Analysis stage.

See Also

[Salesforce Help: Sales Coach Agent](#)

Sales | Coach | Give Feedback on Negotiation/Review Stage

This agent action provides a sales representative with feedback on a sales pitch for an opportunity in the Negotiation and Review stage.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Agentforce Sales Coach: Use Agentforce Sales Coach

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GiveOppNegotiationFdbk
Reference Action Type	Prompt Template
Reference Action	sales_coach_agent_impl__getNegotiationFeedback
Does this action execute one or more prompt templates?	Yes
Required Setup	Setup Agentforce Sales Coach

Sales Coach Agent: Give Feedback on Negotiation/Review Stage and Prompt Templates

This copilot action calls the Get Negotiation/Review Stage Feedback prompt template. To represent the customer in a role play session, the template provides the Sales Coach agent with CRM data from the user and the opportunity record. The template also includes questions to assess how well the sales rep understands the deal and prospect's needs. The information is then used to generate feedback for the sales rep.

Considerations

If you remove this action, Sales Coach agent can't analyze the role play session for opportunities in the Negotiation/Review stage.

See Also

[Salesforce Help: Sales Coach Agent](#)

Sales | Coach | Give Feedback on Proposal/Price Quote Stage

Provides sales representatives with feedback on a sales pitch for an opportunity in the Proposal/Price Quote stage.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Agentforce Sales Coach: Use Agentforce Sales Coach

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GiveOppProposalFdbk
Reference Action Type	Prompt Template
Reference Action	sales_coach_agent_impl__getProposalStageFeed back
Does this action execute one or more prompt templates?	Yes
Required Setup	Setup Agentforce Sales Coach

Sales Coach Agent: Give Feedback on Proposal/Price Quote Stage and Prompt Templates

This copilot action calls the Get Proposal Stage Feedback prompt template. This prompt template provides Sales Coach agent with the context it needs via CRM data from the opportunity record in order to accurately analyze a sales rep's pitch. The prompt template also includes qualification questions that are used to assess how well the sales rep understands the deal and prospect's needs. All of this is used to generate feedback for the sales rep.

Considerations

Removing this action will break Sales Coach agent's ability to analyze sales pitches for opportunities in the Proposal/Price Quote stage.

See Also

[Salesforce Help: Sales Coach Agent](#)

Sales | Coach | Give Feedback on Qualification Stage

Provides sales reps with coaching and guidance on how well they've qualified a specific opportunity.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Agentforce Sales Coach: Use Agentforce Sales Coach

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GiveOppQualificationFdbk
Reference Action Type	Prompt Template
Reference Action	sales_coach_agent_impl__getQualificationFeedback
Does this action execute one or more prompt templates?	Yes
Required Setup	Setup Agentforce Sales Coach

Sales Coach Agent: Give Feedback on Qualification Stage and Prompt Templates

This copilot action calls the Get Qualification Stage Feedback prompt template. This prompt template provides Sales Coach agent with the context it needs via CRM data from the opportunity record in order to accurately analyze a sales rep's pitch. The prompt template also includes qualification questions that are used to assess how well the sales rep understands the deal and prospect's needs. All of this is used to generate feedback for the sales rep. The categories for how feedback is broken down are also captured in the prompt template.

Considerations

Removing this action will break Sales Coach agent's ability to analyze sales pitches for opportunities in the Qualification stage.

See Also

[Salesforce Help: Sales Coach Agent](#)

Sales | Lead Nurturing | Draft Generic Reply Email

Drafts a generic reply email to a lead who has emailed an off-topic question or comment.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Agentforce SDR	Use Agentforce SDR Agent App
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See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	DraftGenericReplyEmail
Reference Action Type	Prompt Template
Reference Action	GenerateGenericFallbackReply
Does this action execute one or more prompt templates?	Yes
Required Setup	Set Up Agentforce Lead Nuturing

SDR Agent: Draft Generic Reply Email

This action calls the Reply with Fallback Response Agentforce SDR Email prompt template. This prompt template provides SDR agent with the context it needs via CRM data from the lead record in order to generate a personalized email to the lead. The prompt template also includes information about the lead's previous email reply, and whether the lead owner has Inbox enabled.

Considerations

Removing this action will break SDR agent's ability to draft generic reply emails to new and updated leads.

Sales | Lead Nurturing | Draft Initial Outreach Email

Drafts an initial sales outreach email to a lead based on the lead record and related CRM data.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Agentforce SDR

Use Agentforce SDR Agent App

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	DraftInitialOutreachEmail
Reference Action Type	Standard Action
Reference Action	Draft Agentforce SDR Email
Does this action execute one or more prompt templates?	Yes
Required Setup	Set Up Agentforce Lead Nuturing

SDR Agent: Draft Initial Outreach Email

This action calls the Draft Agentforce SDR Email prompt template. This prompt template provides SDR agent with the context it needs via CRM data from the lead record in order to generate a personalized email to the lead.

Considerations

Removing this action will break SDR agent's ability to draft initial emails to new and updated leads.

Sales | Lead Nurturing | Draft Meeting Request Email

Drafts an email with a meeting invite to a lead who has expressed interest.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Agentforce SDR

Use Agentforce SDR Agent App

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	DraftMeetingRequestEmail
Reference Action Type	Standard Action
Reference Action	Reply with Meeting Agentforce SDR Email
Does this action execute one or more prompt templates?	Yes
Required Setup	Set Up Agentforce Lead Nuturing

SDR Agent: Draft Meeting Request Email

This action calls the Reply with Meeting Agentforce SDR Email prompt template. This prompt template provides SDR agent with the context it needs via CRM data from the lead record in order to generate a personalized email to the lead. The prompt template also includes information about the lead's previous email reply, and whether the lead owner has Inbox enabled.

Considerations

Removing this action will break SDR agent's ability to draft meeting request emails to new and updated leads.

Sales | Lead Nurturing | Draft Nudge Email

Drafts a follow-up email to a lead who has not yet replied to an earlier email.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Agentforce SDR

Use Agentforce SDR Agent App

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	DraftNudgeEmail
Reference Action Type	Standard Action
Reference Action	Follow up Agentforce SDR Email
Does this action execute one or more prompt templates?	Yes
Required Setup	Set Up Agentforce Lead Nuturing

SDR Agent: Draft Nudge Email

This action calls the Follow up Agentforce SDR Email prompt template. This prompt template provides SDR agent with the context it needs via CRM data from the lead record in order to generate a personalized email to the lead. The prompt template also includes information about the lead's previous email reply, and whether the lead owner has Inbox enabled.

Considerations

Removing this action will break SDR agent's ability to draft follow-up emails to new and updated leads.

Sales | Lead Nurturing | Opt-Out Lead

Sets a lead's Email Opt-Out field to true when the lead replies to an SDR email and asks not to be emailed.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To use Agentforce SDR

Use Agentforce SDR Agent App

See [Common User Access for Standard Agent Actions](#).**Action Details**

API Name	OptOutLead
Reference Action Type	Standard Action
Reference Action	OptOutLead
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce Lead Nuturing

SDR Agent: Opt-Out Lead

This action sets a lead's Email Opt-Out field to true using the lead ID and the lead's current Action Cadence Step Tracker ID if needed.

Considerations

Removing this action will break SDR agent's ability to opt leads out of receiving emails.

Sales | Lead Nurturing | Schedule Email

Schedule an email to be sent by the agent at the time specified by the agent settings.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations or Agentforce 1 Editions**USER PERMISSIONS NEEDED**

To use Agentforce SDR

Use Agentforce SDR Agent App

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ScheduleEmail
Reference Action Type	Standard Action
Reference Action	scheduleEmail
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Agentforce Lead Nuturing

SDR Agent: Schedule Email

This action schedules an email using information about the Action Cadence Step Tracker Id of the recipient's current cadence step, the email being scheduled, the type of email (intro, nudge, or reply), and whether the lead owner should be copied on the email.

Considerations

Removing this action will break SDR agent's ability to schedule and send emails to new and updated leads.

Sales Agreement | Create Sales Agreements Bulk Update Request

Creates a bulk update request for sales agreements based on the input provided by the user.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	createSalesAgreementsBulkUpdateRequest
Action Type	Standard
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Sales Agreement | Create Visit

Create a visit based on user specified instructions and dates for a specific context, such as a sales agreement.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateVisitContextRecord
Reference Action Type	Standard
Does this action execute one or more prompt templates?	No

Sales Agreement | Get Attribute Details

Get the details of an attribute definition and its value.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAttributeDetails
Reference Action Type	Flow
Does this action execute one or more prompt templates?	Yes

Sales Agreement | Perform Bulk Update for Sales Agreement Metrics

Updates the metrics of sales agreements based on the filtering criteria and update details specified by users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

See [Common User Access for Standard Agent](#)

[Actions.](#)

Action Details

API Name	PerformBulkUpdateForSalesAgreementMetrics
Reference Action Type	API
Does this action execute one or more prompt templates?	No

Sales Agreement | Summarize Sales Agreement Performance

Generates a summary of the performance of a sales agreement, including the deviations between the planned and actual quantity and revenue values in the sales agreement.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Automotive add-on or included in Agentforce 1 Automotive Edition. Requires each user to have the Agentforce for Automotive add-on to access the action.

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Manufacturing add-on or included in Agentforce 1 Manufacturing Edition. Requires each user to have the Agentforce for Manufacturing add-on to access the action.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeSalesAgreementPerformance
Reference Action Type	Prompt Template
Does this action execute one or more prompt templates?	Yes

Considerations

The generated summary includes the top 3 products with the highest cumulative deviations. For each product, up to 5 schedule deviations, such as months with the highest variance, are displayed. These limits apply even if the sales agreement schedule extends beyond five months. This default configuration is set to ensure performance and stay within LLM context limits, and it applies regardless of the agreement's size or duration, unless customized.

Security | Classify Security Risk

Identify and prioritize security risks and threats within Salesforce Security data. Provide clear and actionable remediation plans to guide admins on effectively responding to security issues.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To view Security Center pages View Security Center

To create and edit security policies: Manage Security Center

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	Classify Security Risk
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes

Considerations

This action calls the Classify Security Risk prompt template. The prompt template creates next steps to remediate risks for instances where risks or threats are detected with Salesforce Security Data. The action assumes that security posture data is available in the conversation context via a previous agent response or action output.

Security | Get Policy Details

Use the Get Policy Details action to retrieve information about a policy in your Policy Center setup, such as the objects included in the policy.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To view Policy Center policies View All Policy Center Policies

To create and edit Policy Center policies: Modify All Policy Center Policies

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetPolicyDetails
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes

Considerations

The output from the Get Policy Details Agent Action can be used as an input for a custom Flex Template Type to create Policy Insights with Einstein. Policy Insights are approachable, detailed summaries about the policy information generated by Agent Actions. For more information, see [Get Policy Insights with Einstein](#).

Security | Get Policies by Object

Use the Get Policies by Object action to retrieve a list of all policies in your Policy Center setup that contain a specific object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations, or

Agentforce 1 or Einstein 1 Editions**USER PERMISSIONS NEEDED**

To view Policy Center policies	View All Policy Center Policies
To create and edit Policy Center policies:	Modify All Policy Center Policies

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetPoliciesByObject
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes

Considerations

The output from the Get Policies by Object Agent Action can be used as an input for a custom Flex Template Type to create Short Policy Insights with Einstein. Short Policy Insights are approachable, one-sentence summaries about the policy information generated by Agent Actions. For more information, see [Get Policy Insights with Einstein](#).

Security | Get Policies by Policy Type

Use the Get Policies by Policy Type action to retrieve a complete list of every policy of a specific policy type in your Policy Center setup.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To view Policy Center policies	View All Policy Center Policies
To create and edit Policy Center policies:	Modify All Policy Center Policies

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetPoliciesByPolicyType
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes

Considerations

The output from the Get Policies by Policy Type Agent Action can be used as an input for a custom Flex Template Type to create Short Policy Insights with Einstein. Short Policy Insights are approachable, one-sentence summaries about the policy information generated by Agent Actions. For more information, see [Get Policy Insights with Einstein](#).

Security | Get Security Metric Data

Translate your security posture into natural language with the Get Security Metric Data agent action. Ask questions, get answers, and spot threats before they strike – all through simple conversation.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To view Security Center pages	View Security Center
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To create and edit security policies:	Manage Security Center
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See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetSecurityMetricData
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Considerations

Security Center captures selected security, compliance, and governance metrics for all tenants. Ensure that you designate a parent tenant to see security information for multiple tenants. If no date range is provided by the user request or the topic instructions, the last 7 days of data are returned.

Security | Get Security Alerts

Cut through Salesforce notification overload by providing conversational, proactive security posture alerts with the Get Security Alerts agent action.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To view Security Center pages View Security Center

To create and edit security policies: Manage Security Center

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetSecurityAlerts
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Considerations

Alerts notify you by email or in the Salesforce app when a setting in your Security Center tenant exceeds a threshold that you set. Create as many alerts as you want to stay informed about your tenant's security posture. If no date range is provided by the user request or the topic instructions, the last 7 days of alert data are returned.

Security | Summarize User Activity

Identify potential security threats and anomalies by analyzing user activity data. Use the generated risk

analysis summary and proposed remediation steps to effectively respond to security issues.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To view Security Center pages View Security Center

To create and edit security policies: Manage Security Center

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	Summarize User Activity
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes

Considerations

This action calls the Summarize User Activity prompt template. The prompt template retrieves activity for a particular user to identify and summarize potential threats. The action assumes that security posture data is available in the conversation context via a previous agent response or action output.

Service | Add Case Comment

This action lets a customer add a comment to a case.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	AddCaseComment
Reference Action Type	Flow
Reference Action	Add Case Comment
Does this action execute one or more prompt templates?	No

Service | Cancel Order

This action cancels a customer's order.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	CancelOrder
Reference Action Type	Flow
Reference Action	Cancel Order
Does this action execute one or more prompt templates?	No

Considerations

- This action is a template containing example information. Customize it to your use case.

Service | Check Rep Availability for Routing

This action determines rep availability when a work item is escalated from an Agentforce Service agent to a rep.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	CheckAvailabilityForRouting
Reference Action Type	Flow
Reference Action	Check Rep Availability for Routing
Does this action execute one or more prompt templates?	No
Required Setup	Replace the placeholder service channel with the expected channel in the Check Rep Availability for Routing flow, and then add the Check Rep Availability for Routing action to the agent topic, such as the Escalation topic. To invoke the action based on specific conditions, add instructions to the topic. To provide channel-specific escalation experiences, create branches in the provided flow based on conversation channels.

Guidelines and Considerations

To set up the topic instructions, add these details.

- Describe when to invoke the Check Rep Availability for Routing action.
- If no reps are available, provide the customer with an estimated wait time and give them the option to join the wait list or try again later.

Check Rep Availability Before AI Agents Escalate Work

To manage customer expectations and improve customer satisfaction, verify that a rep is available to pick up an escalated work item from an Agentforce Service agent. To check rep's availability for a specific queue, add the Check Rep Availability for Routing agent action to the topic for the agent—such as the Escalation topic, and then add instructions about how the action should work.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Service add-on

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Use these steps to set up the Check Rep Availability for Routing flow.

1. As a prerequisite, select the service channel for the Check Rep Availability for Routing flow.
 - a. In Flow Builder, open the flow.
 - b. In the flow, select the Check Rep Availability for Routing action.
 - c. In the action settings, clear the placeholder service channel, and then select the channel your customers will use to contact your AI agent.

 **Tip** To support this action for multiple channels, add branches to this flow with individual Route Work actions.

 - d. Select **Route To Type** and update the fields.
 - e. Click **Save As New Version**.
 - f. Click **Activate**.
2. From Setup, enter *Agentforce* in the Quick Find box, then select **Agentforce Agents**.
3. From the Agentforce Agents Setup page, click the name of the agent that you want to customize.
4. In the Agent Details page, click **Open in Builder**.
5. In Agentforce Builder, if your agent is active, deactivate it.
6. In the Topics tab, verify that the topic is added to the agent. If not, add it.
7. Click the topic to open it.
8. Click **New Version**, and then click **Save**.

9. Click **This Topic's Actions**, click **New**, and then click **Add from Asset Library**.
10. Add the Check Rep Availability for Routing action.
11. Click **Topic Configuration**.
12. Click **Add Instructions** and enter the instructions, such as: If the customer needs to be escalated, first call the Check Rep Availability for Routing action. If no reps are available, let the customer know that no reps are currently available and suggest that they reach out during business hours.
13. Click **Save**.
14. Click **Activate**.
15. Test the updated Escalation topic.

Service | Close Case

This action lets customers retrieve case information and close cases.

REQUIRED EDITIONS

Available in: Lightning Experience

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

User Permissions Needed	
See Common User Access for Standard Agent Actions .	

Action Details

API Name	CloseCase
Action Type	Standard
Reference Action Type	Flow
Inputs	Case Record, Case Status, Case Reason
Outputs	Success Message, Error Message
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- Picklist values must be passed as text.
- Agentforce doesn't automatically adjust picklist values based on record types or user profiles. To manage this, you can use topic instructions to guide the process or add custom validations within workflows.

- You can add fields into the Agentforce close case functionality in these ways:
 - Update the quick-action layout to include the new fields.
 - Clone the workflow and modify it to accommodate the new fields.
 - Update the topic instructions to support the new fields.
- If multiple cases have the same case reasons and status, the agent can close a maximum of five cases at one time.
- You can create multiple close case actions for different record types.

Service | Create Case

This action lets a customer create a case.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	CreateCase
Reference Action Type	Flow
Reference Action	Create Case
Does this action execute one or more prompt templates?	No

Service | Create Case with Enhanced Data

Creates a detailed support case with a structured summary, relevant conversation history, and a linked chat transcript when triggered from supported messaging channels. This context helps agents resolve issues efficiently and avoid repeated interactions.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	CreateCaseEnhancedData
Reference Action Type	Flow
Reference Action	Create Case Enhanced Data
Does this action execute one or more prompt templates?	No

Considerations

This action creates enhanced support cases with detailed context and linked transcripts when specific conditions are met. If these conditions are not met, the action falls back to basic case creation, which includes only a subject and description. When multiple cases are created in a single messaging session, only the most recent case includes the full transcript.

- A valid messaging session ID must be available for enhanced case creation. The session ID is used to retrieve the chat transcript and provide context for the prompt templates that generate the structured subject and description fields.
- An enhanced case is created when the action is triggered from a supported messaging channel that supports session IDs, such as Enhanced Chat, or a third-party app, such as WhatsApp and Facebook Messenger. These channels automatically generate the required messaging context for enhanced case creation.
- The action works when triggered from an external website or unauthenticated Experience Cloud site, where messaging sessions can be linked and transcript data captured at run time.
- If the action runs in an authenticated Experience Cloud site or in an environment such as Agentforce Builder where a session ID is unavailable, it falls back to basic case creation. In fallback mode, the case includes only a simplified subject and description, and the transcript isn't attached.
- Messaging sessions aren't created automatically in Agentforce Builder. To test enhanced case creation,

include a valid session ID in the user utterance, such as “Create a case for this messaging session 123456.” In production, the messaging session ID is automatically passed, so you don’t need to provide it manually.

- If multiple cases are created in a single messaging session, only the most recent case includes the full transcript. Earlier cases include structured descriptions, but transcripts aren’t attached due to one-to-one mapping. To view the transcript on a created case, add the Messaging Session object to the Case Page Layout as a Related List in Object Manager.
- When a case is created from a messaging session that discusses multiple issues, only the most recent issue is summarized.
- The created case is linked to the customer’s contact record. Attachments shared during the conversation, such as files, screenshots, or logs, aren’t included. The Case Origin field is set to Web, and the Created By field is set to the Agentforce Service agent to help support teams identify automated cases.
- This action doesn’t extract or summarize the contents of uploaded attachments. If an attachment is shared during the conversation, the enhanced case description might indicate that an attachment was provided.
- The generated case description summarizes the issue, outlines attempted troubleshooting steps, and highlights relevant context from the conversation. Because this action uses two prompt templates to analyze the chat and generate case fields, the response can take 10 to 12 seconds to complete.
- You can clone the action to customize prompts, data mappings, or output format as needed for your workflow.

Service | Create a Sales Contact Record

Searches for a contact record that matches the information provided by a prospect during a web inquiry. If one doesn’t exist, a new contact record is created using the information provided.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateSalesContactRecord
Reference Action Type	Flow
Reference Action	CreateSalesLeadRecord
Does this action execute one or more prompt	No

templates?

Guidelines and Considerations

- This action isn't included in any agent topic. To use it, add it to the Sales Record Creation topic and remove the existing Create a Sales Lead Record action.
- A contact record is only created if the agent is able to successfully collect all of the specified fields. If a required field is missing, lead creation will fail.
- Avoid asking for more than five fields of information.
- To add or remove specific record fields when creating a contact, update the instructions in the Create a Sales Record topic and the Create a Sales Contact Record flow to include only your desired fields.

Service | Create a Sales Lead Record

Searches for a lead record that matches the information provided by a prospect during a web inquiry. If one doesn't exist, a new lead record is created using the provided information.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateSalesLeadRecord
Reference Action Type	Flow
Reference Action	CreateSalesLeadRecord
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- The invocable action used in this action is for triggering lead assignment rules when creating a lead. If you don't follow these rules, remove the invocable action.
- A lead record is only created if the agent is able to collect all of the specified fields. If a required field is missing, lead creation will fail.
- Avoid asking for more than five fields of information.

- To add or remove specific record fields when creating a lead, update the instructions in the Sales Record Creation topic and the Create a Sales Lead Record flow to include only your desired fields.

Service | Create a Sales Person Account Record

Searches for a person account record that matches the information provided by a prospect during a web inquiry. If one doesn't exist, a new person account record is created using the information provided.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateSalesPersonAccountRecord
Reference Action Type	Flow
Reference Action	CreateSalesLeadRecord
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- This action isn't included in any agent topic. To use it, add it to the Sales Record Creation topic and remove the existing Create a Sales Lead Record action.
- A contact record is only created if the agent is able to successfully collect all of the specified fields. If a required field is missing, lead creation will fail.
- Avoid asking for more than five fields of information.
- To add or remove specific record fields when creating a contact, update the instructions in the Create a Sales Record topic and the Create a Sales Contact Record flow to include only your desired fields.

Service | Draft Case Response

Identifies a solution for the user's query based on cases that were closed with a similar issue.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Data Cloud enabled, and the Customer Expc Intel and Einstein GPT Copilot add-ons

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	DraftCaseResponse
Reference Action Type	Standard Action
Reference Action	Draft Case Response (draftCaseResponse)
Does this action execute one or more prompt templates?	Yes

Draft Case Response and Prompt Templates

This copilot action calls the Draft Case Response standard invocable action, which uses internal-only prompt templates to draft case responses.

Guidelines and Considerations

The Draft Case Response action requires the activation of Customer Experience Intelligence.

Service | Enhance Product Description

Analyzes product descriptions against customer reviews to identify discrepancies, align features, and suggest improved descriptions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Data Cloud enabled, and the Customer Expc Intel and Einstein GPT Copilot add-ons

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	EnhanceProductDescription
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes

Enhance Product Description and Prompt Templates

This agent action analyzes product descriptions and reviews to generate a summary of aligned and misaligned feedback, and produces an enhanced product description.

Guidelines and Considerations

The Enhance Product Description action requires the activation of Customer Experience Intelligence.

Service | Finalize New Delivery Time

This action updates the scheduled delivery time to the time slot selected by the customer.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-ons.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	FinalizeNewDeliveryTime
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Reference Action Type	Flow
Reference Action	Finalize New Delivery Time
Does this action execute one or more prompt templates?	No

Service | Finalize Reservation

This action books and finalizes a reservation for the time designated by the customer.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	FinalizeReservation
Reference Action Type	Flow
Reference Action	Finalize Reservation
Does this action execute one or more prompt templates?	No

Considerations

- This action is a template containing example information. Customize it to your use case.

Service | Find Similar Cases

Fetches a list of closed cases that are similar or related to the user's query.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Data Cloud enabled, and the Customer Experience Intel and Einstein GPT Copilot add-ons

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindSimilarCases
Reference Action Type	Standard Action
Reference Action	Find Similar Cases (findSimilarCases)
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

The Find Similar Cases action requires the activation of Customer Experience Intelligence.

Service | Get All Cases for Contact

Returns a list of cases related to a given contact record.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	GetAllCasesForContact
Reference Action Type	Flow
Reference Action	Get All Cases For Contact
Does this action execute one or more prompt templates?	No

Service | Get Case By Case Number

Returns a case associated with a given contact record and case number.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	GetCaseByCaseNumber
Reference Action Type	Flow
Reference Action	Get Case By Case Number
Does this action execute one or more prompt templates?	No

Service | Get Case By Verified Case Number

Returns a case associated with a given verified contact ID and case number.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited**, **Einstein 1 Edition**, **Agentforce 1 Edition**, and **Developer** Editions.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Section Title

API Name	GetCaseByVerifiedCaseNumber
Reference Action Type	Flow
Reference Action	Get Case By Case Number
Does this action execute one or more prompt templates?	No

Service | Get Cases for Verified Contact

Returns a list of cases related to a given verified contact ID.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited**, and **Developer** Editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetCasesForVerifiedContact
Reference Action Type	Flow

Reference Action	Get All Cases for Contact
Does this action execute one or more prompt templates?	No

Service | Get Delivery Time Slots

This action returns a list of available time slots to schedule a delivery.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	GetDeliveryTimeSlots
Reference Action Type	Flow
Reference Action	Get Delivery Time Slots
Does this action execute one or more prompt templates?	No

Service | Get Order by Order Number

The Get Order by Order Number action returns the order information associated with a given contact ID and order number.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	GetOrderByOrderNumber
Reference Action Type	Flow
Reference Action	Get Order By Order Number
Does this action execute one or more prompt templates?	No

Considerations

- This action is a template containing example information. Customize it to your use case.

Service | Get Orders By Contact

This action returns a list of orders associated with a given contact record.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	GetOrdersByContact
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Reference Action Type	Flow
Reference Action	Get Orders By Contact
Does this action execute one or more prompt templates?	No

Considerations

- This action is a template containing example information. Customize it to your use case.

Service | Get Reservation Time Slots

This action returns a list of available time slots for the date specified by the customer.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	GetReservationTimeSlots
Reference Action Type	Flow
Reference Action	Get Reservation Time Slots
Does this action execute one or more prompt templates?	No

Considerations

- This action is a template containing example information. Customize it to your use case.

Service | Identify Customer By Email

This action identifies a customer by their email address and returns their contact record.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	IdentifyCustomerByEmail
Reference Action Type	Flow
Reference Action	Identify Customer By Email
Does this action execute one or more prompt templates?	No

Considerations

- This action is a template containing example information. Customize it to your use case.

Service | Raise Flag for Supervisor

Raises a flag in Omni Supervisor when an AI agent conversation requires a supervisor's attention.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	RaiseFlagForSupervisor
Reference Action Type	Standard Invocable Action
Reference Action	Raise Flag for Supervisor (raiseFlagForSupervisor)
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

Use these guidelines and considerations when adding the Raise Flag for Supervisor action.

- When you add this action to a topic, add instructions for when the agent should flag a conversation for a supervisor. For example, add this instruction: "If the customer uses language that shows that they're upset, call the Raise Flag for Supervisor action."
- To use the Raise Flag for Supervisor action with a voice-enabled agent, assign the Voice Call ID variable to the action's Record Id input. To assign the variable to the action input, go to the action input in Agentforce Builder. Then from the Assign a Variable dropdown, select the variable. Your agent must be deactivated to assign a variable to an input.

See Also

[Salesforce Developers: lowerAgentWorkFlag for Lightning Experience](#)

[Salesforce Developers: raiseAgentWorkFlag for Lightning Experience](#)

Service | Reset Password

This action sends a password reset link to the email address associated with the given contact record.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	ResetPassword
Reference Action Type	Flow
Reference Action	Reset Password
Does this action execute one or more prompt templates?	No

Service | Reset Secure Password

This action sends a password reset link to the email address associated with the given verified contact ID.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Section Title

API Name	ResetSecurePassword
Reference Action Type	Flow
Reference Action	Reset Password
Does this action execute one or more prompt templates?	No

Service | Summarize Product Reviews

Summarizes customer reviews and feedback to identify the top products from the specified products and show positive, negative, mixed, or neutral sentiment.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Data Cloud enabled, and the Customer Experience Intel and Einstein GPT Copilot add-ons

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeProductReviews
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes

Summarize Product Reviews and Prompt Templates

This agent action summarizes customer reviews to provide an overview of product feedback and sentiment.

Guidelines and Considerations

The Summarize Product Reviews action requires the activation of Customer Experience Intelligence.

Service | Summarize Service Engagement

Summarizes engagements for a customer, theme, or channel.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Data Cloud enabled, and the Customer Experience Intel and Einstein GPT Copilot add-ons

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeServiceEngagement
Reference Action Type	Standard Action
Reference Action	Summarize Service Engagement (summarizeEngagement)
Does this action execute one or more prompt templates?	Yes

Summarize Service Engagement and Prompt Templates

This copilot action calls the Summarize Service Engagement standard invocable action, which uses internal-only prompt templates to summarize service engagements.

Guidelines and Considerations

The Summarize Service Engagement action requires the activation of Customer Experience Intelligence.

Service | Update Customer Contact

This action updates fields on a customer's contact record, such as the email address, phone number, or postal address.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited**, **Einstein 1 Edition**, **Agentforce 1 Edition**, and **Developer** Editions.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	UpdateCustomerContact
Reference Action Type	Flow
Reference Action	Update Customer Contact
Does this action execute one or more prompt templates?	No

Service | Update Omni-Channel User Configuration

Supervisors can change reps' presence statuses, queue assignments, skill assignments, and skill levels for Omni-Channel users. For example, to decrease wait time, increase customer satisfaction, and increase operational efficiency, the supervisor can temporarily assign idle agents to the busiest queues. Using the conversational interface, they explicitly identify skill levels by number and presence statuses, agents, skills, and queues by name. A supervisor can modify only the Omni-Channel users, queues, and skills that are visible based on their supervisor configuration.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	UpdateOmniUserConfiguration
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set Up Einstein Copilot Actions for Service Cloud

Considerations

- A supervisor can modify only the service reps, queues, and skills that are visible based on their supervisor configuration.
- Adding skill or queue assignments with Agentforce doesn't overwrite existing assignments. For example, if Martha is already assigned to the Messaging queue and the AI agent adds her to the Phone queue, she now belongs to both queues. If needed, you can ask the agent to replace or remove assignments. For example, you can say, "Assign only the Billing queue to Craig Paterson."
- You can include multiple changes in the same request. For example, you can say, "Add Tim Cambell to the Support queue and set Aria Stinson's German-speaking skill to 5."

See Also

[Change What Supervisors See in Omni Supervisor](#)

Service | Update Verified Contact

This action updates fields on a verified customer's contact ID, such as the email address, phone number, or postal address.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

To use this action, customize it according to your business's security standards. We recommend configuring your agent to confirm the requester's identity before completing this action on their behalf. See [Maintain Trust with Agentforce Actions](#).

API Name	UpdateVerifiedContact
Reference Action Type	Flow
Reference Action	Update Customer Contact
Does this action execute one or more prompt templates?	No

Setup | Answer Questions with Salesforce Documentation (Beta)

Answers a question from a user based on information from relevant Salesforce documentation, including links to source articles. This action is the fallback solution if a user makes a request in Setup to the agent and there's no action available to complete that request. This action can also be added to the Employee agent in Lightning Experience.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited Einstein 1 Edition, Agentforce 1 Edition, and Developer Editions.**

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

 **Note** Answer Questions with Salesforce Documentation is a beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the [Product Terms Directory](#). Use of this beta service is at the Customer's sole discretion.

Action Details

 **Note** This action is no longer being updated. We recommend that you use Setup with Agentforce (Beta), which can help with many more administrative tasks and is automatically updated with new functionality. For more information, see [Setup with Agentforce \(Beta\)](#).

API Name	AnswerQuestionsWithSalesforceDocumentation
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes
Required Setup	If you haven't set up and configured Data 360, see Data 360 Features and Learning Path .

Considerations

- When generating responses, the action uses only Salesforce documentation.
- The Answer Questions with Salesforce Documentation action translates answers, Help article titles, and Help articles into the language selected by the Salesforce user.

- On occasion, translated text still contains English words if the translated version of that word isn't available.
- Some text, such as technical terms and UI text, aren't translated by the LLM to prevent inaccuracies.
- If an article in Salesforce Help isn't translated into a user's preferred language, users can switch the article to their preferred language from the language drop-down at the bottom of the page.

Setup | Create External Client App

To create and configure an external client app, use this action.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

 **Note** This action is no longer being updated. We recommend that you use Setup with Agentforce (Beta), which can help with many more administrative tasks and is automatically updated with new functionality. For more information, see [Setup with Agentforce \(Beta\)](#).

API Name	CreateExternalClientApp
Reference Action Type	Standard Action
Reference Action	Create External Client App (createExternalClientApp)
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

This agent action calls the Create External Client App standard invocable action, which creates an external client app based on customer specifications.

Setup | Get and Explain Object Permissions of User (Beta)

Get the specified user's object permissions for a given object. This action returns a list of the user's

assigned object permissions, which can include Create, Read, Edit, Delete, View All, and Modify All. It also can get the profile, permission sets, or permission set groups that grant the user this access.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

-  **Note** The Get and Explain Object Permissions of User action is a beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and the Non-GA Consumption terms in the [Product Terms Directory](#). Use of this beta service is at the Customer's sole discretion.

Action Details

-  **Note** This action is no longer being updated. We recommend that you use Setup with Agentforce (Beta), which can help with many more administrative tasks and is automatically updated with new functionality. For more information, see [Setup with Agentforce \(Beta\)](#).

API Name	GetAndExplainObjectPermissions
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- This action uses the Identify Object By Name (Object Management) action. Review [considerations for this action](#) in Salesforce Help.
- When specifying the user whose access you're checking, use the user's full name or ID instead of the user's email or username.
- For better results, include the word "object" in questions about a user's object permissions.
- If the user is assigned object permissions via a session-based permission set, the action returns the object permissions whether the permission set is activated or not.

See Also

[Permissions and Access Settings](#)

Setup | Get and Explain User Permissions of User (Beta)

Get whether a specified user is assigned the required user permissions for a given task or feature. This action can also return the profile, permission sets, or permission set groups that grant the user this permission, if applicable.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

 **Note** The Get and Explain User Permissions of User action is a beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and the Non-GA Consumption terms in the [Product Terms Directory](#). Use of this beta service is at the Customer's sole discretion.

Action Details

 **Note** This action is no longer being updated. We recommend that you use Setup with Agentforce (Beta), which can help with many more administrative tasks and is automatically updated with new functionality. For more information, see [Setup with Agentforce \(Beta\)](#).

API Name	GetAndExplainUserPermissions
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- To use this action, you must also add the Identify User Permissions by Name action to your agent.
- When specifying the user whose access you're checking, use the user's full name or ID instead of the user's email or username.
- To complete a task or access a feature, users sometimes must be assigned additional object or field permissions, which aren't returned by this action.
- If the user is assigned user permissions via a session-based permission set, the action returns the user permissions whether the permission set is activated or not.

See Also

[Permissions and Access Settings](#)

Setup | Identify Field By Name

This action interprets the user's input to determine if the field exists within an object.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	IdentifyFieldByName
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	Yes

 **Note** This action is no longer being updated. We recommend that you use Setup with Agentforce (Beta), which can help with many more administrative tasks and is automatically updated with new functionality. For more information, see [Setup with Agentforce \(Beta\)](#).

Setup | Identify Object By Name (Object Management)

Admins can use this action under Object Management to interpret user input and determine which object the user is referring to. It returns a list of all matching objects available under Object Manager.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

-  **Note** This action is no longer being updated. We recommend that you use Setup with Agentforce (Beta), which can help with many more administrative tasks and is automatically updated with new functionality. For more information, see [Setup with Agentforce \(Beta\)](#).

API Name	IdentifyObjectByName
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Considerations

- Renamed objects are supported. For example, if the Account is renamed to Hospital.
- Multiple objects can be identified in a single query.
- Object synonyms are supported for common standard objects. For example, if a user's request includes the word "deal", the action can determine that the user is referring to an opportunity. Customization of synonyms isn't supported.

Setup | Identify User Permissions by Name (Beta)

Get the list of the most relevant user permissions required for a specified task or feature that are available in your Salesforce org.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

-  **Note** The Identify User Permissions by Name action is a beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or a written Unified Pilot Agreement if executed by Customer, and the Non-GA Consumption terms in the [Product Terms Directory](#). Use of this beta service is at the Customer's sole discretion.

Action Details

-  **Note** This action is no longer being updated. We recommend that you use Setup with Agentforce (Beta), which can help with many more administrative tasks and is automatically updated with new functionality. For more information, see [Setup with Agentforce \(Beta\)](#).

API Name	IdentifyUserPermissionsByName
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- To complete a task or access a feature, users sometimes must be assigned additional object or field permissions, which aren't returned by this action.

See Also

[Permissions and Access Settings](#)

Setup | Migrate Connected App

Identifies the configurations of a connected app and creates an identical external client app to replace it. After connected app migration, the connected app remains in the App Manager list but is read only.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

-  **Note** This action is no longer being updated. We recommend that you use Setup with Agentforce (Beta), which can help with many more administrative tasks and is automatically updated with new functionality. For more information, see [Setup with Agentforce \(Beta\)](#).

API Name	MigrateConnectedApp
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Reference Action Type	Standard Action
Reference Action	Migrate Connected App (migrateConnectedApp)
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

This agent action calls the Migrate Connected App standard invocable action, which disables the connected app and creates an external client app with identical settings and policies.

To provide a connected app summary, the agent might ask for the connected app's application ID. The application ID is found in the URL for the connected app settings page. It's an alphanumeric string that starts with 06P and appears in the URL after **applicationId%3D**.

Before migrating the connected app to an external client app, you must identify the connected app to migrate. Only local connected apps can be migrated to external client apps. Connected apps that use the OAuth 2.0 Username Password flow can't be migrated to external client apps, because external client apps don't support that flow.

See Also

[User Interface API Developer Guide: All Supported Objects](#)

[Salesforce Help: Connected App to External Client App Migration](#)

Setup | Summarize OAuth in Connected App

Generates a summary of the OAuth configurations for a connected app. The summary output includes general information about the connected app as well as configurations and descriptions of all enabled OAuth Settings and Policies fields. This action is related to the Migrate Connected App feature.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

 **Note** This action is no longer being updated. We recommend that you use Setup with Agentforce

(Beta), which can help with many more administrative tasks and is automatically updated with new functionality. For more information, see [Setup with Agentforce \(Beta\)](#).

API Name	SummarizeOAuthConnectedApp
Reference Action Type	Standard Action
Reference Action	Summarize OAuth in Connected App (summarizeConnectedApp)
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

This agent action calls the Summarize OAuth in Connected App standard invocable action and returns a description of the connected app's OAuth configuration.

To provide a connected app summary, the agent might ask for the connected app's application ID. The application ID is found in the URL for the connected app settings page. It's an alphanumeric string that starts with 06P and appears in the URL after **applicationId%3D**.

The Summarize OAuth in Connected App action returns a list of general information about the connected app as well as its OAuth policies and settings. The summary also provides a description for each configuration.

See Also

[User Interface API Developer Guide: All Supported Objects](#)

[Salesforce Help: Connected App to External Client App Migration](#)

Scheduler | Cancel Appointment For Scheduler

Cancel the specified service appointments.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CancelAppointmentForScheduler
Reference Action Type	Flow
Reference Action	CancelAppointment
Does this action execute one or more prompt templates?	No

Considerations

- Requires the service appointment IDs to cancel.
- Before calling this action, first call the List Appointments for Scheduler action.
- Verified users can only cancel their own appointments.

Scheduler | Collect Appointment Details for Scheduler

Collects the details required to schedule a service appointment. For example, if the user wants to schedule an appointment, this action asks for details such as the date, topic, service resource, and so on.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CollectAppointmentDetailsForScheduler
Reference Action Type	Flow
Reference Action	collAppt
Does this action execute one or more prompt templates?	No

Considerations

- This action expects the names of appointment topics, service territories, and service resources. It doesn't support IDs of these objects.

Scheduler | Create and Schedule Appointment for Scheduler

Creates and schedules appointments.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateAndScheduleAppointmentForScheduler
Reference Action Type	Flow
Reference Action	agentAppt
Does this action execute one or more prompt templates?	No

Considerations

- When rescheduling or modifying an appointment, a service appointment ID must be provided.
- If a guest user successfully books an appointment, this action creates a lead.
- This action requires that you provide the time slot in the time zone of the service territory.

Scheduler | Get Appointment Details for Scheduler

Retrieves the details of an existing service appointment.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions** with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAppointmentDetailsForScheduler
Reference Action Type	Flow
Reference Action	FetchAppointmentInfo
Does this action execute one or more prompt templates?	No

Considerations

- To use this action, the user must be verified.
- Display the user's service appointments with status "None" or "Scheduled".
- The appointment topic that's entered is matched exactly with the topic marked on the appointment.
- For contacts, service appointments with the same contact ID are displayed.
- The scheduled start time of the appointments is shown in the time zone of the service territory.
- For each appointment, the status, service territory, work type, and scheduled start time are displayed.

Scheduler | Get Appointment Time Slots for Scheduler

Get the available slots for the appointment. This action is invoked when an appointment is booked or modified. Call this action with a related action that can provide the input it requires.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer Editions** with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetAvailableSlotForScheduler
Reference Action Type	Flow
Reference Action	getSlot
Does this action execute one or more prompt templates?	No

Considerations

- Requires 'Appointment Details' as the input.
- The output time slots are displayed in the time zone of the service territory.

Scheduler | List Appointments for Scheduler

Get service appointments for a specific date and returns the appointment IDs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, Einstein 1, Agentforce 1 for Field Service, and Developer** Editions with any Field Service license and access to Agentforce Service agents.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetServiceAppointments
Reference Action Type	Flow
Reference Action	IstAppts
Does this action execute one or more prompt templates?	No

Considerations

- Appointments are listed for a verified user.
- Verified users can only view their own service appointments with status "None" or "Scheduled".

- The appointment topic that's entered is matched exactly with the topic marked on the appointment.
- For contacts, service appointments with the same contact ID are displayed.
- The scheduled start time of the appointments is shown in the time zone of the service territory.
- For each appointment, the status, service territory, work type, and scheduled start time are displayed.

Slack | Add Users to a Slack Channel

Adds members to a channel you specify.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	AddUsersToSlackChannel
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack.

Slack | Archive a Slack Channel

Archives a channel in Slack when it's no longer needed. Agents must be a member of a channel to archive it.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ArchiveSlackChannel
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack.

Slack | Create a Salesforce Channel in Slack

Creates a Salesforce Channel in Slack.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateSlackRecordChannel
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack.

Slack | Create a Slack Canvas

Creates and formats a new Slack canvas with the provided information.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with Foundations, or

Agentforce 1 or Einstein 1 Editions**USER PERMISSIONS NEEDED**

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateSlackCanvas
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack.

Guidelines and Considerations

- [Set up and manage Agentforce in Slack.](#)
- [Connect Salesforce and Slack.](#)

Slack | Create a Slack Channel

Creates a public or private Slack channel.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateSlackChannel
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Required Setup

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

Slack | Create an Account Executive Brief

Generates an executive brief using details in a given account record.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CreateAnExecutiveBrief
Reference Action Type	Executive Brief prompt template
Reference Action	CreateAnExecutiveBrief
Does this action execute one or more prompt templates?	Yes
Required Setup	Set up and manage Agentforce in Slack

Create an Account Executive Brief and Prompt Templates

By default, this agent action uses the Create an Executive Brief prompt template to summarize a provided account record. The action then passes the summary to the [Create a Slack Canvas](#) action to create the brief.

If you like, you can create your own [prompt template](#) to customize the format of the output. After you create your prompt template, change the instructions in the General Slack Topic to reference your new prompt template. Be sure to add the [Create a Slack Canvas](#), [Update a Slack Canvas](#), and [Share Slack Canvas](#) actions.

Slack | List Slack Workspaces

Lists all workspaces in a Slack Enterprise organization.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ListSlackWorkspaces
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack.

Slack | Look Up a Salesforce Channel in Slack

Identifies a Salesforce Channel in Slack for additional actions.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	LookupSlackRecordChannel
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack.

Slack | Look Up a Slack User

Uses Salesforce user IDs to identify Slack users for additional actions.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	LookupUser
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack .

Guidelines and Considerations

- [Set up and manage Agentforce in Slack](#).
- [Connect Salesforce and Slack](#).

Slack | Search Slack

Searches public Slack messages for the requested information.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SearchSlack
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack.

Guidelines and Considerations

- The agent searches only in public messages in workspaces a Slack Admin has added the agent to.
- [Set up and manage Agentforce in Slack.](#)
- [Connect Salesforce and Slack.](#)

Slack | Send a Slack Direct Message

Sends a Slack direct message (DM). The message is visible in a DM between the user and the recipient.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SendSlackDirectMessage
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack.

Guidelines and Considerations

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

- [Connect Salesforce and Slack.](#)

Slack | Send a Slack Message to a Channel

Sends a message to a Slack channel you specify. Messages in public channels are visible to anyone in Slack. Messages in private channels are only visible to members of the channel.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SendMessageToSlackChannel
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack.

Slack | Share a Slack Canvas

Sends a Slack Canvas to a Slack Channel or Direct Message.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	ShareSlackCanvas
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack.

Slack | Summarize a Channel

Provides a summary of channel messages for a specified channel and time frame. Channel summaries default to seven days and can be up to 30 days.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	SummarizeAChannel
Reference Action Type	Standard Action
Reference Action	SummarizeAChannel
Does this action execute one or more prompt templates?	Yes
Required Setup	Set up and manage Agentforce in Slack

Summarize a Channel and Prompt Templates

By default, this agent action calls the summarize channel standard invocable action which uses the Summarize Channel prompt template.

If you like, you can create your own [prompt template](#) to customize the format of the output. After you create your prompt template, change the instructions in the General Slack Topic to reference your new

prompt template. For example, you can update the General Slack Topic to something like:

When asked to Summarize a Slack Channel, use the "Summarize a Slack Channel" action. Set the *summaryTemplateName* input variable to "Slack_Incident_Summary."

Guidelines and Considerations

- The default time period of a summary is seven days.
- Summaries can be requested for up to 30 days.

See Also

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

[Connect Salesforce and Slack](#)

Slack | Start a Conversation with an Agent in Slack

Starts a conversation with an Agentforce agent in a Slack direct message. After the conversation is initiated, the recipient can interact with the agent.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	StartASlackConversationWithAnAgent
Reference Action Type	Flow
Reference Action	StartASlackConversationWithAnAgent
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack

Guidelines and Considerations

- Employee agent types can only trigger flows in the context of the user calling the agent.

- Some flows, such as auto-launched and scheduled flows don't work as expected.

See Also

[Set up and manage Agentforce in Slack](#)
[Connect Salesforce and Slack](#)

Slack | Update a Slack Canvas

Updates a Slack canvas created earlier in the conversation.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	UpdateSlackCanvas
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	Set up and manage Agentforce in Slack .

Guidelines and Considerations

- The agent updates the Canvas only if it's created in the same conversation.
- [Set up and manage Agentforce in Slack](#).
- [Connect Salesforce and Slack](#).

Swarming | Begin Swarm

Initiates a swarm in response to a swarm request. Used to get subject matter experts collaborating to respond and resolve customer issues.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Einstein for Service add-on.

USER PERMISSIONS NEEDED

To execute actions in Agentforce (Default):	Use Agentforce Default Agent
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To use prompt templates:	Prompt Template User
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Action Details

API Name	BeginSwarm
Action Type	Standard
Reference Action Type	Flow
Inputs	recordId
Outputs	salesforceChannelId, swarmType
Does this action execute one or more prompt templates?	No

Swarming | Check Swarming Preconditions

Checks that the preconditions are met before creating a swarm.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Einstein for Service add-on.

USER PERMISSIONS NEEDED

To execute actions in Agentforce (Default):	Use Agentforce Default Agent
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To use prompt templates:	Prompt Template User
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Action Details

API Name	CheckSwarmPreconditions
Action Type	Standard

Reference Action Type	Standard Action
Inputs	recordId
Outputs	collaborationTool, contextUserId, slackAppId, outputMessage
Does this action execute one or more prompt templates?	No

Swarming | Complete Swarm

Completes a swarm and performs all closure actions, including Slack notifications and channel archiving.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Einstein for Service add-on.

USER PERMISSIONS NEEDED

To execute actions in Agentforce (Default): Use Agentforce Default Agent

To use prompt templates: Prompt Template User

Action Details

API Name	CompleteSwarm
Action Type	Standard
Reference Action Type	Standard Action
Inputs	collaborationAppId, shouldArchiveChannel, swarmId
Outputs	faultMessage
Does this action execute one or more prompt templates?	No

Swarming | Complete Swarm Creation

Handles the final actions required to create Swarm and Swarm member records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions with Einstein for Service add-on.

USER PERMISSIONS NEEDED

To execute actions in Agentforce (Default):	Use Agentforce Default Agent
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To use prompt templates:	Prompt Template User
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Action Details

API Name	CompleteSwarmCreation
Action Type	Standard
Reference Action Type	Flow
Inputs	recordId, collaborationTool, recordOwner, labelForSwarmMemberName, swarmRecordName, swarmOwner, swarmDescription
Outputs	swarmid, faultMessage
Does this action execute one or more prompt templates?	No

Swarming | Complete Swarm Records

Sets the status of Swarm and Swarm Member records to Closed and sets completion timestamps.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions with Einstein for Service add-on.

USER PERMISSIONS NEEDED

To execute actions in Agentforce (Default):	Use Agentforce Default Agent
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To use prompt templates:	Prompt Template User
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Action Details

API Name	CompleteSwarmRecords
Action Type	Standard
Reference Action Type	Standard Action
Inputs	recordId, swarmId
Outputs	collaborationAppId, errorMessage
Does this action execute one or more prompt templates?	No

Swarming | Create Swarm Salesforce Channel

Creates a Salesforce channel for the swarm conversation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Einstein for Service add-on.

USER PERMISSIONS NEEDED

To execute actions in Agentforce (Default): Use Agentforce Default Agent

To use prompt templates: Prompt Template User

Action Details

API Name	CreateSwarmSalesforceChannel
Action Type	Standard
Reference Action Type	Standard Action
Inputs	recordId, slackAppId, slackTeamId, swarmRecordName, swarmOwner, swarmDescription
Outputs	swarmId, collaborationRoomId, slackChannelId, collaborationUrl, swarmType, isSuccess
Does this action execute one or more prompt templates?	No

Swarming | Create Swarm Slack Channel

Creates a Slack channel for the Swarm conversation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Einstein for Service add-on.

USER PERMISSIONS NEEDED

To execute actions in Agentforce (Default):	Use Agentforce Default Agent
To use prompt templates:	Prompt Template User

Action Details

API Name	CreateSwarmSlackChannel
Action Type	Standard
Reference Action Type	Standard Action
Inputs	isPrivate, recordId, slackAppId, slackTeamId, slackChannelName, swarmRecordName, swarmOwner, swarmDescription
Outputs	isSuccess, collaborationRoomId, collaborationUrl, slackChannelId, swarmId, swarmType,
Does this action execute one or more prompt templates?	No

Swarming | Create Swarming Slack Thread

Creates a new Slack thread inside an existing Slack Channel for the swarm conversation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Einstein for Service add-on.

USER PERMISSIONS NEEDED

To execute actions in Agentforce (Default):	Use Agentforce Default Agent
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USER PERMISSIONS NEEDED

To use prompt templates: Prompt Template User

Action Details

API Name	CreateSlackSwarmThread
Action Type	Standard
Reference Action Type	Standard Action
Inputs	recordId, slackAppId, slackTeamId, slackChannelId, swarmRecordName, swarmOwner, swarmDescription
Outputs	swarmId, collaborationRoomId, slackChannelId, slackChannelName, collaborationUrl, isSalesforceChannel, isPrivate, isArchived, swarmType, isSuccess
Does this action execute one or more prompt templates?	No

Swarming | Get Swarm Type and Slack Access Details

Gets the details of the Slack workspace, whether the swarm is in a dedicated or new channel, and returns the appropriate Swarm Channel type. Then, using the Slack workspace ID, confirms the running user's access to create a Salesforce channel.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions with Einstein for Service add-on.

USER PERMISSIONS NEEDED

To execute actions in Agentforce (Default): Use Agentforce Default Agent

To use prompt templates: Prompt Template User

Action Details

API Name	GetSwarmTypeSlackAccessDetails
Action Type	Standard

Reference Action Type	Standard Action
Inputs	isDedicatedChannel, recordId, slackAppId, slackTeamId
Outputs	isSalesforceChannelEnabled, isSuccess, slackTeamId, salesforceChannelId, swarmType
Does this action execute one or more prompt templates?	No

Swarming | Reopen Swarm Procedure

Reopens a swarm, updating member statuses and handling Omni Skills routing as needed. This action supports multiple reopen strategies and ensures there are no duplicate member assignments.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Einstein for Service add-on.

USER PERMISSIONS NEEDED

To execute actions in Agentforce (Default):	Use Agentforce Default Agent
To use prompt templates:	Prompt Template User

Action Details

API Name	ReopenSwarmProcedure
Action Type	Standard
Reference Action Type	Standard Action
Inputs	isOmniSkillsRoutingEnabled, recordId, reopenMethod, swarmId, swarmMembers
Outputs	swarmMembersNotAddedUsingOmni, validSwarmMembers
Does this action execute one or more prompt templates?	No

Swarming | Send Slack Updates

Sends updates to Slack channels and members as part of the swarming process. Handles member

invitations, message updates, and error reporting for Slack integration.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Einstein for Service add-on.

USER PERMISSIONS NEEDED

To execute actions in Agentforce (Default): Use Agentforce Default Agent

To use prompt templates: Prompt Template User

Action Details

API Name	SendSlackUpdates
Action Type	Standard
Reference Action Type	Standard Action
Inputs	collaborationAppId, isPrivate, reopenMethod, swarmId, swarmMembersNotAddedUsingOmni, validSwarmMembers, wasUnarchived
Outputs	errorMessage
Does this action execute one or more prompt templates?	No

Swarming | Unarchive Channel

Unarchives the Slack channel associated with a Swarm, ensures that the channel is eligible, updates related records and members, checks Slack integration, retrieves channel and swarm details, and handles errors.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Einstein for Service add-on.

USER PERMISSIONS NEEDED

To execute actions in Agentforce (Default): Use Agentforce Default Agent

USER PERMISSIONS NEEDED

To use prompt templates: **Prompt Template User**

Action Details

API Name	UnarchiveChannel
Action Type	Standard
Reference Action Type	Standard Action
Inputs	swarmId
Outputs	collaborationAppId, isOmniSkillsRoutingEnabled, isPrivate, swarmMembers, wasUnarchived
Does this action execute one or more prompt templates?	No

Timesheets | Create Timesheets and Timesheet Entries

Creates timesheets and timesheet entries for the current user. This action cannot be performed on behalf of another user.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Timesheets and Labor Cost Optimization add-on license or included in Agentforce 1 Timesheets and Labor Cost Optimization Edition. Requires each user to have the Agentforce for Timesheets add-on to access the action.

USER PERMISSIONS NEEDED

To enable agents:

Manage AI Agents AND the admin user permission for the agent type you want to create

OR

Customize Application

To build and manage agents:

Manage Agentforce Service Agents AND Manage AI Agents

USER PERMISSIONS NEEDED

OR

Customize Application

To use agent actions: AI and Agentforce for Timesheets

Action Details

API Name	CreateTmshtAndTmshtEntr
Reference Action Type	Invocable Action
Reference Action	Create Timesheets and Timesheet Entries
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Timesheets

Guidelines and Considerations

This action is a template containing example information. Customize it to your use case.

Timesheets | Verify Or Submit Timesheet

Initiates the process of verification or submission of a timesheet. The response indicates whether the timesheet has been sent for verification or submission.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Timesheets and Labor Cost Optimization add-on license or included in Agentforce 1 Timesheets and Labor Cost Optimization Edition. Requires each user to have the Agentforce for Timesheets add-on to access the action.

USER PERMISSIONS NEEDED

To enable agents:

Manage AI Agents AND the admin user permission for the agent type you want to create

OR

USER PERMISSIONS NEEDED

Customize Application

To build and manage agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To use agent actions:

AI and Agentforce for Timesheets

Action Details

API Name	VerifyOrSubmitTimesheet
Reference Action Type	Invocable Action
Reference Action	Verify Or Submit Timesheet
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Timesheets

Guidelines and Considerations

This action is a template containing example information. Customize it to your use case.

Timesheets | Get Timesheet Details

Gets the details including the timesheet, timesheet entries, and timesheet validation errors for a date provided by the user.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Agentforce for Timesheets and Labor Cost Optimization add-on license or included in Agentforce 1 Timesheets and Labor Cost Optimization Edition. Requires each user to have the Agentforce for Timesheets add-on to access the action.

USER PERMISSIONS NEEDED

To enable agents:

Manage AI Agents AND the admin user permission for the agent type you want to create

OR

Customize Application

To build and manage agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To use agent actions:

AI and Agentforce for Timesheets

Action Details

API Name	getTimesheetDetails
Reference Action Type	Invocable Action
Reference Action	Get Timesheet Details
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce for Timesheets

Guidelines and Considerations

This action is a template containing example information. Customize it to your use case.

Unified Catalog | Check Product Eligibility

Checks whether a product is eligible for a contact, an account, or a user based on predefined criteria. The action can verify product eligibility when accounts, contacts, or users self-serve, or when service reps or request fulfillers assist requestors.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions with Unified Catalog and the Agentforce

Employee Agent add-on license.

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	CheckProductEligibility
Action Type	Flow
Reference Action Type	Check Product Eligibility (sc_enterprise_catalog__ChkProdtElig)
Does this action execute one or more prompt templates?	No

Guidelines and Considerations

- The action isn't included in an agent topic.
- The action requires the contact, account, or user ID of the logged-in internal employee or external customer to verify product eligibility when they self-serve on Experience Cloud site pages. The ID of the employee or customer can be provided to the action by using their session ID on the Experience Cloud site to retrieve their corresponding ID in Salesforce.
- The action requires the current record context to identify the internal employee or external customer on behalf of whom service reps or request fulfillers are verifying product eligibility. The current record can belong to either an account, a contact, or a user. If an account is provided, the action automatically finds the first contact associated with the account and verifies the contact's eligibility for the product.
- The action verifies eligibility for only products associated with service processes.

Unified Catalog | Launch Service Process

Launches a single, URL-based, guided digital intake form for a service process. By capturing all critical information from the user upfront, this form helps agents to immediately create a case or incident without delays, errors, or follow-up.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with Unified Catalog and the Agentforce Employee Agent add-on license.

USER PERMISSIONS NEEDED

To add the Service Process Launch Management topic to your agent:

Manage Agentforce Service Agents and Manage AI Agents

OR

Customize Application

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	GetProductLaunchCard
Action Type	Standard
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No

Agent Limitations with Multiple Portals

If your org has multiple portals, such as one for employees and another for vendors, an agent topic with a hardcoded portal name won't work across all of them. This is because the launch URLs are derived from the specific portal name, which means you must create a separate agent for each portal with its own unique portal name.

Volunteer Management | Find Unfilled Shifts

Identifies volunteer initiatives and job positions that have unfilled shifts. Return unfilled shifts within a date range and a capacity threshold.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the Agentforce for Nonprofit add-on to access the action.

PERMISSIONS NEEDED

To use Volunteer Management:

Manage Volunteer Data

PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	FindUnfilledShifts
Reference Action	Invocable Action
Does this action execute one or more prompt templates?	No

Volunteer Management | Match Volunteers to Shifts

Find suitable volunteers to fill open shifts based on the time, location, and qualification requirements. Return volunteers that meet the shift requirements and generate a list from the results to use as a contact list to request that the volunteers sign up for the open shift.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Agentforce for Nonprofit add-on or included in Agentforce 1 Nonprofit Edition. Requires each user to have the Agentforce for Nonprofit add-on to access the action.

PERMISSIONS NEEDED

To use Volunteer Management: Manage Volunteer Data

See [Common User Access for Standard Agent Actions](#).

Action Details

API Name	MatchVolunteersToShifts
Reference Action	Connect API
Does this action execute one or more prompt templates?	No

Omnistudio | Diagnose Components (Pilot)

Diagnoses Omnistudio components, namely, Flexcards, Omniscripts, Integration Procedures, and Data

Mappers. Identifies potential warnings and errors that may occur at runtime and provides information about how to fix them.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

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

Action Details

API Name	omniScriptDiagnostic
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	If you haven't set up and configured Data 360, see Data 360 Features and Learning Path .

Guidelines and Considerations

- Some potential errors or issues aren't flagged via this action. For instance, access issues, issues resulting due to inherent performance limits in various environments, and so on. Only configuration issues within an Omnistudio designer are identified.

Omnistudio | Get Org Objects (Pilot)

Returns a list of sObjects associated with the given use case and, if needed, suggests new objects users must create to fulfill a requirement.

REQUIRED EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

See [Common User Access for Standard Agent Actions](#).

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

Action Details

API Name	<code>omniStudioGetOrgObjects</code>
Reference Action Type	Standard Action
Does this action execute one or more prompt templates?	No
Required Setup	If you haven't set up and configured Data 360, see Data 360 Features and Learning Path .

Guidelines and Considerations

- Review any suggested objects and check to see if they fulfill your use case. If a new object is suggested, review the structure and naming conventions before you create one.

Standard Agent Connection Reference

Each connection gives your agent context about specific channels.

REQUIRED EDITIONS

Available in: Lightning Experience

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

For the best customer experience, we recommend creating a separate Agentforce Service agent for the Telephony and Service Email connections.

Enhanced Chat V2

Enhanced Chat v2 channels use custom Lightning Web Components (LWCs) instead of adaptive response formats. For more information, see [Personalize Enhanced Chat v2 Interface with Custom Lightning Types](#).

Associated channels	Enhanced Chat V2
Supported agent types	Agentforce Service Agent

Messaging

Associated channels	<ul style="list-style-type: none">• Enhanced In-App Chat• Enhanced Web Chat• Enhanced WhatsApp• Enhanced Facebook Messenger• Enhanced Apple Messages for Business• Enhanced LINE• Bring Your Own Channel
Included adaptive response formats	<ul style="list-style-type: none">• Adaptive Response Format: Rich Choice Response• Adaptive Response Format: Rich Link Response
Supported agent types	<ul style="list-style-type: none">• Agentforce Service Agent• Agentforce Employee Agent (for Enhanced Web Chat only)

Service Email

Associated channels	Email-to-Case
Included adaptive response formats	Service Email Text
Supported agent types	Agentforce Service Agent

Telephony

Associated channels	Agentforce Voice
---------------------	------------------

Supported agent types	Agentforce Service Agent
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See Also

[Provide Conversation Support with Messaging in Service Cloud](#)

Standard Adaptive Response Format Reference

Standard adaptive response formats are included with standard connections and are built to work with specific channels, interfaces, or apps.

REQUIRED EDITIONS

Available in: Lightning Experience

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

[Adaptive Response Format: Rich Link Response](#)

A rich link response is a web page link with a title and image. Currently, rich link response is available for Agentforce Service Agent only.

[Adaptive Response Format: Rich Choice Response](#)

A rich choice response is a question with a list of records specific to the end-user. Currently, rich choice response is available for Agentforce Service Agent only.

See Also

[Set Up Connections in the Legacy Builder](#)

Adaptive Response Format: Rich Link Response

A rich link response is a web page link with a title and image. Currently, rich link response is available for Agentforce Service Agent only.

REQUIRED EDITIONS

Available in: Lightning Experience

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

Adaptive Response Format Details

Mapped messaging component	Enhanced link
----------------------------	---------------

Supported channels	<p>For supported channels, see channels associated with the Messaging connection.</p> <p>Rich choice responses appear as rich content in Omni Supervisor.</p>
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Considerations

- You can't customize the mapped messaging component in Messaging Component Builder.
- Rich link response supports these messaging component formats:
 - Media for enhanced Facebook Messenger channels
 - Rich link for Enhanced Chat V1, enhanced Apple Messages for Business, and enhanced LINE channels
 - Text for all supported channels
- Rich link response supports PNG, JPEG, and JPG image formats.
- A rich link response can have one image and URL only. To include multiple images and URLs in responses, use [Adaptive Response Format: Rich Choice Response](#).
- To prevent disruptions in performance, include the MIME type with each image or include an image URL with a .jpg, .jpeg, or .png file extension. If you don't include the MIME type or a URL with a supported file extension, the image MIME type defaults to image/jpeg.
- To use rich link response with a [custom client deployment that uses the Enhanced Chat REST API](#), the client must support the Text, Rich Link, and Media messaging component formats.

To use the rich link responses in agent responses, create a custom agent action that returns the required information. For a sample reference action, see the example Apex class.

Link URL

URL of the website.

Link Title

Text to display with the URL.

Link Image URL

Publicly accessible URL of the image. As a best practice, include the image file extension in the URL. For example, www.example.com/image.jpg.

Link Image MIME Type

Optional. MIME Type of the image. For example, image/jpeg.

Description Text

Optional. Text sent immediately before the rich link. For example, 'Great choice! This item was created with the most incredible materials. Learn more about this item.'

This Apex class retrieves item details based on a list of item names. It returns a list of objects, each

containing an item name, URL, title, image URL, and MIME type.



Example

```
public class GetItemDetailsInvocable {

    // Represents input for getItemDetails.
    public class ItemDetailRequest {
        @InvocableVariable(label='Item Name' description='The name of the item' required=true)
        public String itemName;
    }

    // Defines structure for output of getItemDetails.
    public class ItemDetail {
        public String linkURL;
        public String linkTitle;
        public String linkImageURL;
        public String linkImageMimeType;
        public String descriptionText;
    }

    // Represents output of getItemDetails
    public class ItemDetailResponse {
        @InvocableVariable(label='Item Details' description='linkURL, linkTitle, Image linkURL, MIME Type, and description for a given item name' required=true)
        public List<ItemDetail> itemDetails;
        public ItemDetailResponse() {
            this.itemDetails = new List<ItemDetail>();
        }
    }

    @InvocableMethod(label='Get Item Details' description='Returns linkURL, linkTitle, image linkURL, MIME Type, and description for a given item name')
    public static List<ItemDetailResponse> getItemDetails(List<ItemDetailRequest> requests) {

        List<ItemDetailResponse> responses = new List<ItemDetailResponse>();

        for (ItemDetailRequest request : requests) {
            ItemDetailResponse response = new ItemDetailResponse();
            response.itemDetails = new List<ItemDetail>();
            response.itemDetails.add(new ItemDetail());
            response.itemDetails.get(0).linkURL = request.itemName;
            response.itemDetails.get(0).linkTitle = request.itemName;
            response.itemDetails.get(0).linkImageURL = request.itemName;
            response.itemDetails.get(0).linkImageMimeType = request.itemName;
            response.itemDetails.get(0).descriptionText = request.itemName;
            responses.add(response);
        }
    }
}
```

```
        ItemDetail itemDetail = new ItemDetail();
        String itemName = request.itemName.toLowerCase();

        // Example item data.
        if (itemName.contains('item1')) {
            itemDetail.linkURL = 'https://www.example.com/item1';
            itemDetail.linkTitle = 'Item 1';
            itemDetail.linkImageURL = 'https://www.example.com/image
1.jpg';
            itemDetail.linkImageMimeType = 'image/jpeg';
            itemDetail.descriptionText = 'This is an amazing item!'
        } else if (itemName.contains('item2')) {
            itemDetail.linkURL = 'https://www.example.com/item2';
            itemDetail.linkTitle = 'Item 2';
            itemDetail.linkImageURL = 'https://www.example.com/image
2.png';
            itemDetail.linkImageMimeType = 'image/png';
            itemDetail.descriptionText = 'This is a great item!'
        } else if (itemName.contains('item3')) {
            itemDetail.linkURL = 'https://www.example.com/item3';
            itemDetail.linkTitle = 'Item 3';
            itemDetail.linkImageURL = 'https://www.example.com/image
3.png';
            itemDetail.linkImageMimeType = 'image/png';
            itemDetail.descriptionText = 'This is a wonderful item!'
        } else {
            itemDetail.linkURL = 'https://www.example.com/default';
            itemDetail.linkTitle = 'Unknown Item';
            itemDetail.linkImageURL = 'https://www.example.com/defaul
t.jpg';
            itemDetail.linkImageMimeType = 'image/jpeg';
            itemDetail.descriptionText = 'This is an item!'
        }
        response.itemDetails.add(itemDetail);
        responses.add(response);
    }
    return responses;
}
}
```

Example: Send a Rich Link Response to a Customer With a Flow

In this example, you send links and images associated with menus using an autolaunched flow and rich link response.

See Also

- [Messaging Component Types and Formats](#)
- [Create a Custom Agent Action in the Legacy Builder](#)

Example: Send a Rich Link Response to a Customer With a Flow

In this example, you send links and images associated with menus using an autolaunched flow and rich link response.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To build and manage Service Agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To open, edit, or create a flow in Flow Builder:

Manage Flow

Before you begin:

- [Create an Agentforce Service agent](#). If you want to use an active agent, create a version of it or deactivate it.
- [Connect the service agent to an enhanced Messaging channel](#).
- [Turn on adaptive response formats](#).
- If you haven't worked in Flow Builder before, see [Automate Tasks with Flows](#).

Create a Custom Object

To store information about different menus, create a custom object.

1. [Create a custom object](#) with these properties. Give the object a descriptive name, such as Menu.
 - a. Data Type: Text
 - b. Optional Features: Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups
 - c. Object Classification: Allow Sharing, Allow Bulk API Access, Allow Streaming API Access
 - d. Search Status: Allow Search
2. In Object Manager, click **Fields & Relationships** and then create these fields on the custom object.
 - a. Image MIME Type with the Text data type.

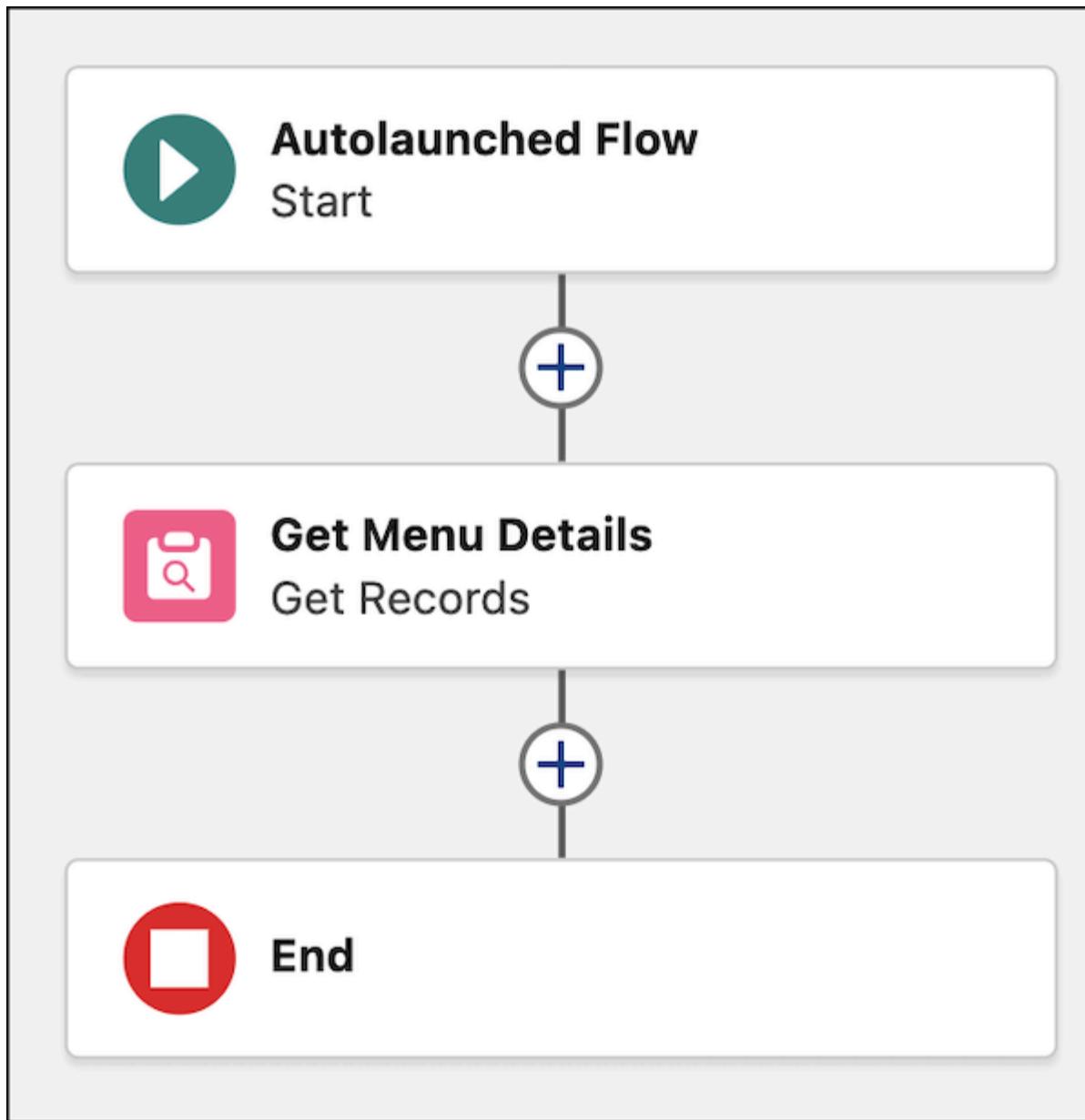
- b. Menu with the Rich Text Area data type.
 - c. Menu URL with the URL data type.
 - d. Description Text with the Text data type.
3. Create a few records from this object. For example, you can create a dinner menu and lunch menu. Later, your agent uses information from these records in responses.

Make sure that the agent user has access to the custom object and its fields. Also, give your agent access to URLs by adding them to your [trusted URLs](#) and [CORS allowlist](#).

Create a Flow

To retrieve details from Menu records, create an autolaunched flow. Later, you create a custom agent action based on this flow.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Click **New Flow**. Select **Autolaunched** and then **Autolaunched Flow (No Trigger)**.
3. In Flow Builder, create a **menuList** resource with these properties.
 - a. Data Type: Record. Select **Allow multiple values (collection)**.
 - b. Object: Menu
 - c. Availability Outside the Flow: Available for output
4. Create a **recordId** resource with these properties.
 - a. Data Type: Text
 - b. Availability Outside the Flow: Available for input
5. Create a **menuRecordId** resource with these properties.
 - a. Data Type: Text
 - b. Availability Outside the Flow: Available for output
6. Create a **menuURL** resource with these properties.
 - a. Data Type: Text
 - b. Availability Outside the Flow: Available for output
7. After the Start element, click and then add a Get Records element with these properties.
 - a. Label: Get Menu Details
 - b. Get Records of This Object: Select the Salesforce Object data source. From the Object dropdown, select the Menu object that you created.
 - c. Filter Product Menu Records: Select the None–Get All Menu Records condition requirement.
 - d. How Many Records to Store: All Records
 - e. How to Store Record Data: Choose fields and assign variables (advanced).
 - f. Select Variable to Store Product Menu Records: The **menuList** resource that you created.
 - g. Select Menu Fields to Store in Variable: Name, ImageMimeType__c, Menu__c, MenuURL__c, DescriptionText__c
8. Save and activate the flow.



Make sure that the agent user has the Run flows permission.

Create a Custom Agent Action

Create a custom agent action that uses the Get Menu Details flow as a reference action.

1. Reference Action Type: Flow
2. Reference Action: Get Menu Details
3. Agent Action Instructions: Finds and retrieves details from a menu. For each menu, retrieves its name, image, MIME type, and URL. This action is for when a user asks to see the menu.
4. Loading Details: Getting menu
5. recordId input instructions: The single ID of the Salesforce record with the menu name.
6. menuList output instructions: A list of menu URLs. Select **Show in conversation**.

7. menuURL output instructions: The URL of the menu. Select **Show in conversation**.
8. menuRecordId output instructions: The single ID of the Salesforce record with the menu name. Select **Show in conversation**.

Create a Custom Agent Topic

Create a custom agent topic that includes the Get Menu Details action.

1. Open your Agentforce Service agent in Agentforce Builder.
2. [Create a custom agent topic](#) with these properties.
 - a. Classification Description: This topic handles customer requests for menu information.
 - b. Scope: Your job is only to provide lists of available menus and display the details for a selected menu, including names, images, and URLs. If the user asks for a task that is out of scope, should state that you cannot assist and can only provide menu information.
 - c. Instructions:
Use the Get_Menu_Details action to get menu details for a given menu.
When the user says: "give me the menu", always give a list of available menus.
 - d. Include the Get Menu Details agent action in the topic.

To test your agent, activate it and then chat with it on a connected channel.

Adaptive Response Format: Rich Choice Response

A rich choice response is a question with a list of records specific to the end-user. Currently, rich choice response is available for Agentforce Service Agent only.

REQUIRED EDITIONS

Available in: Lightning Experience

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

Adaptive Response Format Details

Mapped messaging component	Question with dynamic options
Supported channels	For supported channels, see channels associated with the Messaging connection . Rich choice responses appear as rich content in Omni Supervisor.

Considerations

- You can't customize the mapped messaging component in Messaging Component Builder.
- Rich choice response supports these messaging component formats:
 - Buttons for Enhanced Chat, enhanced WhatsApp, enhanced Facebook Messenger, and enhanced LINE channels
 - Card Carousel for Enhanced Chat, enhanced Facebook Messenger, and enhanced LINE channels
 - List Selector for enhanced WhatsApp and enhanced Apple Messages for Business channels
 - Text for all supported channels
- The number of options that a rich choice response can include depends on the messaging component format it's mapped to and the channel that it's sent on. For example, rich choice response supports up to 10 options for the Card Carousel format on enhanced Facebook Messenger channels. For more information, see [Messaging Component Formats](#).
- Rich choice response supports Case, Product, Asset, Order, and custom records.
- Rich choice response supports PNG, JPEG, and JPG image formats.
- To prevent disruptions in performance, include the MIME type with each image or include an image URL with a .jpg, .jpeg, or .png file extension. If you don't include the MIME type or a URL with a supported file extension, the image MIME type defaults to image/jpeg.
- To use rich choice response with a [custom client deployment that uses the Enhanced Chat REST API](#), the client must support the Text, Card Carousel, Buttons, and List Selector messaging component formats.

To use the rich choice responses that include images in agent responses, create a custom agent action that returns the required information. For a sample reference action, see the example Apex class.

Name

Name of the list option.

MIME Type

Optional. MIME Type of the image. For example, image/jpeg.

Image URL

Publicly accessible URL of the image. As a best practice, include the image file extension. For example, www.example.com/image.jpg.

Description Text

Optional. Text sent immediately before the rich choice. For example, 'We have a variety of items that are made with most incredible materials. Learn more about this item and how it was created.'

This Apex class retrieves a list of item options based on a category name. It returns a list of objects, each containing an item name, image URL, MIME type, and description text.



Example

```
public with sharing class ItemOptionService {

    // Defines structure of an item name-image pair
    public class ItemDetail {
        public String itemName;
        public String itemImageUrl;
        public String itemMimeType;
        public String itemDescriptionText;
        public ItemDetail(String itemName, String itemImageUrl, String itemMimeType, String itemDescriptionText) {
            this.itemName = itemName;
            this.itemImageUrl = itemImageUrl;
            this.itemMimeType = itemMimeType;
            this.itemDescriptionText = itemDescriptionText;
        }
    }

    // Represents an object that holds a list of item name-image pairs
    public class ItemOptionWrapper {
        @InvocableVariable(label='Item Options' required=true)
        public List<ItemDetail> itemDetails;
        public ItemOptionWrapper() {
            this.itemDetails = new List<ItemDetail>();
        }
    }

    // Represents input for getItemOptionsByCategory
    public class ItemOptionInput {
        @InvocableVariable(label='Category Name' required=true)
        public String categoryName;
    }

    @InvocableMethod(label='Get Item Options by Category' description='Returns a list of item options based on the category name')
    public static List<ItemOptionWrapper> getItemOptionsByCategory(List<ItemOptionInput> categoryNames) {
        System.debug('categoryNames: ' + categoryNames);

        // Get the category name from the input list
        String category = categoryNames[0].categoryName.toLowerCase();
        System.debug('Processing category: ' + category);

        ItemOptionWrapper selectedItemWrapper = new ItemOptionWrapper();
```

```
if(category.contains('category1')) {  
    selectedItemWrapper.itemDetails.add(new ItemDetail('Item1', 'h  
    ttps://example.com/images/item1.jpg', 'image/jpeg', 'We have items that ar  
    e great and made with most incredible materials. Learn more about item 1 a  
    nd how it was created.'));  
    selectedItemWrapper.itemDetails.add(new ItemDetail('Item2', 'h  
    ttps://example.com/images/item2.jpg', 'image/jpeg', 'We have items that ar  
    e great and made with most incredible materials. Learn more about item 2 a  
    nd how it was created.'));  
} else if(category.contains('category2')) {  
    selectedItemWrapper.itemDetails.add(new ItemDetail('Item3', 'h  
    ttps://example.com/images/item3.jpg', 'image/jpeg', 'We have items that ar  
    e great and made with most incredible materials. Learn more about item 3 a  
    nd how it was created.'));  
} else {  
    selectedItemWrapper.itemDetails.add(new ItemDetail('Default It  
    em', 'https://example.com/images/default.jpg', 'image/jpeg', 'We have item  
    s that are great and made with most incredible materials. Learn more about  
    this item and how it was created.'));  
}  
  
System.debug('Returning : ' + selectedItemWrapper);  
return new List<ItemOptionWrapper>{ selectedItemWrapper };  
}  
}  
}
```

Example: Send a Rich Choice Response to a Customer With an Apex Class

In this example, you send multiple links with images associated with food options using an Apex class and rich choice response.

Example: Send a Rich Choice Response to a Customer With a Flow

In this example, you send product options using an autolaunched flow and rich choice response. You also help the agent decide whether to present text-based product options as buttons or a list.

See Also

[Messaging Component Types and Formats](#)

[Create a Custom Agent Action in the Legacy Builder](#)

Example: Send a Rich Choice Response to a Customer With an Apex Class

In this example, you send multiple links with images associated with food options using an Apex class and rich choice response.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To build and manage Service Agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To define, edit, delete, set security, and set version Author Apex settings for Apex classes:

Before you begin:

- [Create an Agentforce Service agent](#). If you want to use an active agent, create a version of it or deactivate it.
 - [Connect a service agent to an enhanced Messaging channel](#).
 - [Turn on adaptive response formats](#).
 - If you haven't worked with Apex classes before, see [Apex Code Overview](#).

Create an Apex Class

To store and return a list of food options and details, create an Apex class.

[Create an Apex class](#). In the class editor, add this code snippet.

```
public class GetFoodDetailsInvocable {  
  
    @InvokableMethod(label='Get Food Details' description='Returns linkURL, li  
nkTitle, image linkURL, image MIME Type, and description text for a given food  
name')  
    public static List<FoodDetailResponse> getFoodDetails(List<FoodDetailReque  
st> requests) {  
        List<FoodDetailResponse> responses = new List<FoodDetailResponse>();  
  
        for (FoodDetailRequest request : requests) {  
            FoodDetailResponse response = new FoodDetailResponse();  
            FoodDetail foodDetail = new FoodDetail();  
            String foodName = request.foodName.toLowerCase();
```

```
// Populate food details dynamically from GetFoodOptionsInvocable
selections
    if (foodName.contains('pizza')) {
        foodDetail.linkURL = 'https://www.foodwebsite.com/pizza';
        foodDetail.linkTitle = 'Delicious Pizza';
        foodDetail.linkImageURL = 'https://www.publicdomainpictures.net/pictures/240000/velka/pizza-1508086895mrm.jpg';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'Our pizza is made with the most flavorful tomato sauce and fresh cheese so that you can indulge all of your senses.'
    } else if (foodName.contains('pasta')) {
        foodDetail.linkURL = 'https://www.foodwebsite.com/pasta';
        foodDetail.linkTitle = 'Tasty Pasta';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1606761568499-5ddd45e43b32';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'Our pasta is topped with the most flavorful tomato sauce and fresh cheese so that you can indulge all of your senses.'
    } else if (foodName.contains('tiramisu')) {
        foodDetail.linkURL = 'https://tastesbetterfromscratch.com/easy-tiramisu/';
        foodDetail.linkTitle = 'Classic Tiramisu';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1571877227200-a0d98ea607e9';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'Our tiramisu is made with the freshest ingredients so that you can indulge all of your senses.'
    } else if (foodName.contains('tacos')) {
        foodDetail.linkURL = 'https://www.foodwebsite.com/tacos';
        foodDetail.linkTitle = 'Authentic Mexican Tacos';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1551504734-5ee1c4a127da';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'Our tacos are made with the freshest ingredients so that you can indulge all of your senses.'
    } else if (foodName.contains('quesadilla')) {
        foodDetail.linkURL = 'https://www.foodwebsite.com/quesadilla';
        foodDetail.linkTitle = 'Cheesy Quesadilla';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1613952273499-5de42c1789c7';
        foodDetail.linkImageMimeType = 'image/jpeg';
```

```
        foodDetail.linkDescriptionText = 'All of our food is delicious.'  
    } else if (foodName.contains('nachos')) {  
        foodDetail.linkURL = 'https://www.foodwebsite.com/nachos';  
        foodDetail.linkTitle = 'Loaded Nachos';  
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1606755962773-b35f5d518c46';  
        foodDetail.linkImageMimeType = 'image/jpeg';  
        foodDetail.linkDescriptionText = 'All of our food is delicious.'  
    } else if (foodName.contains('croissant')) {  
        foodDetail.linkURL = 'https://www.foodwebsite.com/croissant';  
        foodDetail.linkTitle = 'Fresh Croissant';  
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1587049352907-23d8ff0ceac3';  
        foodDetail.linkImageMimeType = 'image/jpeg';  
        foodDetail.linkDescriptionText = 'All of our food is delicious.'  
    } else if (foodName.contains('ratatouille')) {  
        foodDetail.linkURL = 'https://www.foodwebsite.com/ratatouille';  
        foodDetail.linkTitle = 'Traditional Ratatouille';  
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1633527076476-f847fc6d16a2';  
        foodDetail.linkImageMimeType = 'image/jpeg';  
        foodDetail.linkDescriptionText = 'All of our food is delicious.'  
    } else if (foodName.contains('creme brulee')) {  
        foodDetail.linkURL = 'https://www.foodwebsite.com/creme-brulee';  
        foodDetail.linkTitle = 'French Crème Brûlée';  
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1609767400465-45e06f28a680';  
        foodDetail.linkImageMimeType = 'image/jpeg';  
        foodDetail.linkDescriptionText = 'All of our food is delicious.'  
    } else if (foodName.contains('sushi')) {  
        foodDetail.linkURL = 'https://www.foodwebsite.com/sushi';  
        foodDetail.linkTitle = 'Japanese Sushi';  
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1589308078050-cf38fe054d63';  
        foodDetail.linkImageMimeType = 'image/jpeg';  
        foodDetail.linkDescriptionText = 'All of our food is delicious.'
```

```
    } else if (foodName.contains('ramen')) {
        foodDetail.linkURL = 'https://www.foodwebsite.com/ramen';
        foodDetail.linkTitle = 'Delicious Ramen';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1
602334872613-3ab02f3c95a7';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'All of our food is delicious.'
    } else if (foodName.contains('tempura')) {
        foodDetail.linkURL = 'https://www.foodwebsite.com/tempura';
        foodDetail.linkTitle = 'Crispy Tempura';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1
571771439241-89b31f5092c7';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'All of our food is delicious.'
    } else if (foodName.contains('dumplings')) {
        foodDetail.linkURL = 'https://www.foodwebsite.com/dumplings';
        foodDetail.linkTitle = 'Chinese Dumplings';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1
617196036851-20ce58a15b1b';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'All of our food is delicious.'
    } else if (foodName.contains('peking duck')) {
        foodDetail.linkURL = 'https://www.foodwebsite.com/peking-duc
k';
        foodDetail.linkTitle = 'Peking Duck';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1
643989946129-73e3a872ad80';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'All of our food is delicious.'
    } else if (foodName.contains('spring rolls')) {
        foodDetail.linkURL = 'https://www.foodwebsite.com/spring-roll
s';
        foodDetail.linkTitle = 'Fresh Spring Rolls';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1
604328698692-80d9b81baf4d';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'All of our food is delicious.'
    } else if (foodName.contains('burger')) {
        foodDetail.linkURL = 'https://www.foodwebsite.com/burger';

```

```
        foodDetail.linkTitle = 'Classic Burger';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1
551782450-a2132b4ba21d';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'All of our food is deliciou
s.'
    } else if (foodName.contains('hot dog')) {
        foodDetail.linkURL = 'https://www.foodwebsite.com/hot-dog';
        foodDetail.linkTitle = 'Grilled Hot Dog';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1
621248313959-d6c0e480c54e';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'All of our food is deliciou
s.'
    } else if (foodName.contains('apple pie')) {
        foodDetail.linkURL = 'https://www.foodwebsite.com/apple-pie';
        foodDetail.linkTitle = 'Homemade Apple Pie';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1
606760225157-145fe46c0b7f';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'All of our food is deliciou
s.'
    } else {
        foodDetail.linkURL = 'https://www.foodwebsite.com/food';
        foodDetail.linkTitle = 'Unknown Food';
        foodDetail.linkImageURL = 'https://images.unsplash.com/photo-1
606851093480-b24197b5fd6a';
        foodDetail.linkImageMimeType = 'image/jpeg';
        foodDetail.linkDescriptionText = 'All of our food is deliciou
s.'
    }
    response.foodDetails.add(foodDetail);
    responses.add(response);
    return responses;
}

return responses;
}

// Request Wrapper Class
public class FoodDetailRequest {
    @InvocableVariable(label='Food Name' description='The name of the food
item' required=true)
    public String foodName;
```

```
}

public class FoodDetail {
    public String linkURL;
    public String linkTitle;
    public String linkImageURL;
    public String linkImageMimeType;
    public String linkDescriptionText;
}

// Response Wrapper Class
public class FoodDetailResponse {

    @InvocableVariable(label='Food Details' required=true)
    public List<FoodDetail> foodDetails;

    public FoodDetailResponse() {
        this.foodDetails = new List<FoodDetail>();
    }
}

}
```

In this Apex class, the GetFoodDetailsInvokable class gets a list of food names and returns a list of food items based on the given names. The class takes the FoodDetailRequest wrapper class as input, which contains a food name and variables that can hold food item details. For each food name, the GetFoodDetailsInvokable class looks for a match against predefined food items. If there's a match, the class assigns the item's website link, title, image URL, image MIME type, and description text to a custom object defined by the FoodDetailResponse wrapper class.

Make sure that the agent user has access to the Apex class.

Create a Custom Agent Action

Create a custom agent action that uses the Get Food Details Apex class as a reference action.

1. Reference Action Type: Apex
2. Reference Action: Get Food Details
3. Agent Action Instructions: Finds and retrieves details for food options. For each food option, retrieves its name, image, MIME type, URL, and description text. This action is for when a user asks what is on the menu.
4. Loading Details: Getting food options
5. foodName input instructions: The name of the food option. Select **Require input**.
6. foodDetails output instructions: Details for a food option, including the link, title, image URL, image MIME type, and description text. Select **Show in conversation**.

Create a Custom Agent Topic

Create a custom agent topic that includes the Get Food Details action.

1. Open your Agentforce Service agent in Agentforce Builder.
2. [Create a custom agent topic](#) with these properties.
 - a. Classification Description: This topic provides the user a list of food options and details. For example, use this topic when the user says: "what's on the menu."
 - b. Scope: Your job is only to provide food options and details.
 - c. Instructions:

Use Get_Food_Details action to get food options and details.

When the user says: "what's on the menu," always give a list of food options. For example, Classic Tiramisu, Homemade Apple Pie, and Delicious Ramen. Then the user is expected to select a food option. Using the food option name selected by user, pass the name to the Get_Food_Details action to get details about the item.

When user selects a food option, use the Get_Food_Details action to give the user the link and image for the food option. For example, if user selects Delicious Ramen, then send Delicious Ramen as input to the Get_Food_Details action.
 - d. Include the Get Food Details agent action in the topic.

To test your agent, activate it and then chat with it on a connected channel.

Example: Send a Rich Choice Response to a Customer With a Flow

In this example, you send product options using an autolaunched flow and rich choice response. You also help the agent decide whether to present text-based product options as buttons or a list.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To build and manage Service Agents:

Manage Agentforce Service Agents AND Manage AI Agents

OR

Customize Application

To open, edit, or create a flow in Flow Builder:

Manage Flow

Before you begin:

- [Create an Agentforce Service agent](#). If you want to use an active agent, create a version of it or deactivate it.
- [Connect a service agent to an enhanced Messaging channel](#).
- If you haven't worked in Flow Builder before, see [Automate Tasks with Flows](#).

Create Product Records

Create a few active product records. Later, your agent uses information from these records in responses. Make sure that the agent user has access to the Product object and its fields.

For example, you can [create product records](#) with this information:

- Product Name: Performance Tee
Product Description: Lightweight, moisture-wicking short-sleeve shirt designed for activity and comfort.
- Product Name: Denim Jeans
Product Description: Modern jeans made with stretch fabric for maximum comfort and movement.
- Product Name: Cotton Socks
Product Description: Durable, breathable ankle-length socks for everyday use. One size fits all.
- Product Name: Crewneck Sweater
Product Description: Classic, soft cotton sweater for year-round casual wear. Available in six colors.
- Product Name: Utility Jacket
Product Description: Water-resistant, hooded jacket with multiple pockets for practical outdoor use.

Create a Flow

To retrieve product records, create an autolaunched flow. Later, you create a custom agent action based on this flow. Make sure that the agent user has the Run flows permission.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Click **New Flow** and then select **Autolaunched Flow (No Trigger)**.
3. In Flow Builder, create a productList resource with these properties.
 - a. Data Type: Record. Select Allow multiple values (collection).
 - b. Object: Product
 - c. Availability Outside the Flow: Available for output
4. Create a recordId resource with these properties.
 - a. Data Type: Text
 - b. Availability Outside the Flow: Available for input
5. After the Start element, click and then add a Get Records element with these properties.
 - a. Label: Get Products
 - b. Get Records of This Object: Select the Salesforce Object data source. From the Object dropdown, select the Product object.
 - c. Filter Product Records: Select the **None–Get All Product Records** condition requirement.
 - d. How Many Records to Store: All Records
 - e. How to Store Record Data: Choose fields and assign variables (advanced).

- f. Select Variable to Store Product Records: The productList resource that you created.
 - g. Select Product Fields to Store in Variable: Product Name, Product Description
6. Save and activate the flow.

Create a Custom Agent Action

Create a custom agent action that uses the Get Products flow as a reference action.

1. Reference Action Type: Flow
2. Reference Action: Get Products
3. Agent Action Instructions: Finds and retrieves product records. For each product, retrieve its name and description. This action is for when a user asks for products.
4. Loading Details: Getting products
5. recordId input instructions: The single ID of the Salesforce record with the product name.
6. productList output instructions: A list of products. Select **Show in conversation**.

Create a Custom Agent Topic

Create a custom agent topic that sends product options.

1. Open your Agentforce Service agent in Agentforce Builder.
2. [Create a custom agent topic](#) with these properties.
 - a. Classification Description: Handles inquiries related to searching for products, including gathering user requirements and presenting product options. For example, use this topic when the user says: "What product do you have?"
 - b. Scope: My job is only to assist customers with searching for products by gathering user requirements and presenting available product options based on user requests.
 - c. Instructions: Use the Get_Products action to get product options.

Guide Agent Responses with Topic Instructions

Add a topic instruction that helps the agent decide how to present text-based product options.

1. To encourage the agent to send options as buttons, tell it to present choices. For example: Present products in a clear, organized format with details like the description. Instruct the user to choose an option to see more details.
2. To encourage the agent to send options as a list, tell it to not present choices. For example: Present products in a clear, organized format with details like the description. Do not ask the user to select or choose a specific product.

To test your agent, activate it and then chat with it on a connected channel.

Einstein Platform Reference

Review Einstein generative AI features, considerations, and implementation details.

[Considerations for Einstein Generative AI](#)

Review these considerations before you use Einstein generative AI.

[Geo-Aware LLM Request Routing on the Einstein Generative AI Platform](#)

The Einstein generative AI platform routes large language model (LLM) requests to servers that are closest to where your Einstein generative AI platform instance is located. Geo-aware routing includes LLM API requests made by Einstein generative AI features that use the Einstein generative AI platform.

Considerations for Einstein Generative AI

Review these considerations before you use Einstein generative AI.

Rate Limits

For information about rate limits per model, see [Large Language Model Limits](#).

To request a rate limit increase, contact your Salesforce account executive.

Record Pages in Lightning App Builder

We don't recommend putting record fields into a narrow region on the right-hand side of the page when designing a custom record page in the Lightning App Builder. On pages that support Agentforce, the Einstein panel covers up content on the right-hand side of the page. If record fields are behind the Einstein panel, users who use Einstein for field generation can't see the updated field information.

Generative AI-Enabled Fields

If you don't see a generative AI-enabled field icon on a record field () , then a prompt template isn't supported for that field component.

See Also

[Einstein Generative AI Supported Languages and Locales](#)

[Geo-Aware LLM Request Routing on the Einstein Generative AI Platform](#)

Geo-Aware LLM Request Routing on the Einstein Generative AI Platform

The Einstein generative AI platform routes large language model (LLM) requests to servers that are closest to where your Einstein generative AI platform instance is located. Geo-aware routing includes

LLM API requests made by Einstein generative AI features that use the Einstein generative AI platform.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Supported Models

Geo-aware routing is available to these models, provided that the models are available in the relevant regions.

- OpenAI models (such as GPT-4 Omni). These geo-aware models use OpenAI or Azure OpenAI to service LLM requests. The same underlying model is used by OpenAI and Azure OpenAI. See [Geo-Aware Routing for OpenAI and Azure OpenAI](#).
- Anthropic models (hosted on Amazon Bedrock)

Availability

Geo-aware routing is available to:

- AI agents
- Salesforce applications and features that use OpenAI and Anthropic models through the Einstein generative AI platform
- Customers who use OpenAI and Anthropic models through [Models API](#) or Prompt Builder.

To find out whether geo-aware routing is enabled for any specific Salesforce AI feature, refer to its documentation or contact your Salesforce account executive.

Proximity and Routing

Proximity to the nearest LLM server is determined by the region in which your Einstein generative AI platform instance is located. If you enabled the Einstein generative AI platform on or after June 13, 2024, then your Einstein generative AI platform region is the same as your Data 360 region ([Data 360: Data Center Locations](#)). Otherwise, contact your Salesforce account executive to learn where it's provisioned.

Routing in the Models API

If you use the Einstein generative AI platform directly through Models API, then it's recommended that you use model API names for geo-aware models.

Feedback and Audit

To view where your LLM requests are being routed to, refer to [Feedback and Audit features](#).

Feature-specific Support

To track whether an Einstein feature supports geo-aware LLM request routing, see the feature's documentation.

[Geo-Aware Routing for OpenAI and Azure OpenAI](#)

A geo-aware model, such as GPT 4 Omni, uses OpenAI or Azure OpenAI to service LLM requests. The same underlying model is used by OpenAI and Azure OpenAI.

[Geo-Aware Routing for Anthropic](#)

LLM requests for Anthropic on AWS Bedrock are routed to the nearest AWS data center where a model endpoint is available.

See Also

[External: Salesforce Infrastructure and Sub-processors](#)

Geo-Aware Routing for OpenAI and Azure OpenAI

A geo-aware model, such as GPT 4 Omni, uses OpenAI or Azure OpenAI to service LLM requests. The same underlying model is used by OpenAI and Azure OpenAI.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Requests in the United States are serviced in the United States by OpenAI, and in some cases Azure OpenAI. Requests outside the United States are routed to a supported Azure OpenAI endpoint that is closest to where your Einstein generative AI platform instance is located.

Azure OpenAI

This table shows geo-aware routing for Azure OpenAI requests for GPT 4 Omni. Each geo-aware model has its own set of model regions where model endpoints are deployed. Models other than GPT 4 Omni may not have model endpoints in all the regions listed in the table. For more information for each model, see [Large Language Model Support](#).

The columns are:

- **Salesforce Org Region:** The region where a Salesforce org is hosted

- **Primary Model Endpoint Region:** The primary region for the Azure OpenAI endpoint
- **Secondary Model Endpoint Regions:** The secondary in-region model endpoints where model requests are retried if the primary model endpoint isn't responsive. If the primary and secondary endpoints aren't responsive, the request falls back to Azure OpenAI in the United States. If the request fails on each primary and secondary model endpoint and the model endpoints in the United States, an error is returned. See the Disable Fallback to the United States section after the table.

Salesforce Org Region	Primary Model Endpoint Region	Secondary Model Endpoint Regions
Australia	Australia	None
Brazil	Brazil	None
Canada	Canada	None
France	France	<ul style="list-style-type: none"> • Germany • Sweden • Switzerland
Germany	Germany	<ul style="list-style-type: none"> • France • Sweden • Switzerland
India	India	None
Indonesia	Australia	None
Japan	Japan	None
South Korea	Japan	None
Singapore	Australia	None
Sweden	Sweden	<ul style="list-style-type: none"> • France • Germany • Switzerland
Switzerland	Switzerland	<ul style="list-style-type: none"> • France • Germany • Sweden
United Kingdom	United Kingdom	None
United States	United States	None

Disable Fallback to the United States

Before you can disable the final fallback to the United States, you must turn on Data 360. Data 360 is automatically provisioned as soon as a Data Cloud license is added to your Salesforce org. See [Turn On Data 360](#).

To disable the final fallback to the United States, go to Einstein Setup and toggle Turn Off Model Provider Region Fallback. Instead of falling back to the United States, an error is returned. Requests are still tried on the primary and secondary model endpoints before an error is returned.

Batch Processing

To asynchronously generate large quantities of responses for prompt templates, you can use prompt template batch processing. These models support a global endpoint for native batch processing by Azure OpenAI.

- GPT 4 Omni
- GPT 4 Omni Mini
- GPT 4.1

For these models with global endpoints, batch requests may be processed in regions outside your org's region, even if non-batch LLM requests are restricted to specific in-region Azure endpoints. Batch processing doesn't follow geo-aware routing rules and doesn't provide in-region enforcement.

For more information about batch processing, see [Prompt Template Batch Processing in Apex](#) in the [Agentforce Developer Guide](#).

See Also

[Geo-Aware LLM Request Routing on the Einstein Generative AI Platform](#)

[External: Data, privacy, and security for Azure OpenAI Service](#)

Geo-Aware Routing for Anthropic

LLM requests for Anthropic on AWS Bedrock are routed to the nearest AWS data center where a model endpoint is available.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

This table shows geo-aware routing for Claude Sonnet 4 requests. The geo-aware routing rules are different for other Anthropic models. The columns are:

- **Salesforce Org Region:** The region where a Salesforce org is hosted
- **Primary Model Endpoint Region:** The primary region for the Claude Sonnet 4 endpoint

Salesforce Org Region	Primary Model Endpoint Region
Australia	Australia
Brazil	United States
Canada	United States
France	France
Germany	Germany
India	India
Indonesia	Indonesia
Japan	Japan
South Korea	South Korea
Singapore	Singapore
Sweden	Sweden
Switzerland	Germany
United Kingdom	Germany
United States	United States

 **Note** AWS Bedrock uses inference profiles to manage LLM requests. Cross-region inference requests are kept within the AWS regions that are part of the geography where the request originates. For example, a request to Claude Sonnet 4 made within the United States is kept within the AWS Regions in the United States. A request made in Japan can be serviced by any of the destinations in the APAC Claude Sonnet 4 inference profile. For more information, see [Model support by AWS Region](#) in Amazon Bedrock.

See Also

[Geo-Aware LLM Request Routing on the Einstein Generative AI Platform](#)

Einstein Trust Layer

Trusting generative AI with your company secrets and your customer data while balancing the benefits of generative AI is still a challenge today. The Einstein Trust Layer is a secure AI architecture, built into the Salesforce platform. It's a set of agreements, security technology, and data and privacy controls used to keep your company safe while you explore generative AI solutions.

Watch the video for a quick overview of how the Einstein Trust Layer works. You can also click [this link](#) to

launch the video in full screen mode on a different tab.

For a detailed walkthrough of the Einstein Trust Layer and its capabilities, see [Einstein Trust Layer: Designed for Trust](#).

Watch the video: <https://play.vidyard.com/Kw7DfNqG7AGPAZcqrn2T5>

	<h3>Zero-Data Retention Policy</h3> <p>Your data isn't retained by third-party LLMs. We partner with all our external model providers, such as OpenAI, to enforce the zero-data retention policy.</p> <ul style="list-style-type: none">• No data is used for LLM model training or product improvements by third-party LLMs.• No data is retained by the third-party LLMs.• No human being at the third-party provider looks at data sent to their LLM.
	<h3>Dynamic Grounding with Secure Data Retrieval</h3> <ul style="list-style-type: none">• Relevant information from a Salesforce record is merged with the prompt to provide context.• Secure data retrieval of Salesforce data for grounding the prompt based on the permissions of the user executing the prompt.• Secure data retrieval preserves in place all standard Salesforce role-based controls for user permissions and field-level security when merging grounding data from your CRM instance or Data 360.
	<h3>Prompt Defense</h3> <ul style="list-style-type: none">• System policies help limit hallucinations and decrease the likelihood of unintended or harmful outputs by the LLM.• System policies can vary for different generative AI features and use cases.
	<h3>Data Masking</h3> <ul style="list-style-type: none">• Sensitive data is detected and masked before sending the prompt to the LLM.• Data masking supports multiple regions and languages.• You can select what must and must not be masked.
	<h3>Toxicity Scoring</h3> <ul style="list-style-type: none">• Einstein Trust Layer scores content on toxicity.

	<ul style="list-style-type: none">Toxicity scores are logged and stored in Data 360 as part of the audit trail.
	<p>Audit</p> <ul style="list-style-type: none">Prompts, responses, and trust signals are logged and stored in Data 360.Feedback can be used for improving prompt templates.Provides pre-built reports and dashboards for analysis.

See Also

[Einstein Trust Layer Region and Language Support](#)

[Set up Einstein Trust Layer](#)

[Large Language Model Data Masking](#)

[Audit Trail](#)

[Trailhead: The Einstein Trust Layer](#)

Einstein Trust Layer: Designed for Trust

The Einstein Trust Layer is a collection of features, processes, and policies designed to safeguard data privacy, enhance AI accuracy, and promote responsible use of AI across the Salesforce ecosystem.

REQUIRED EDITIONS

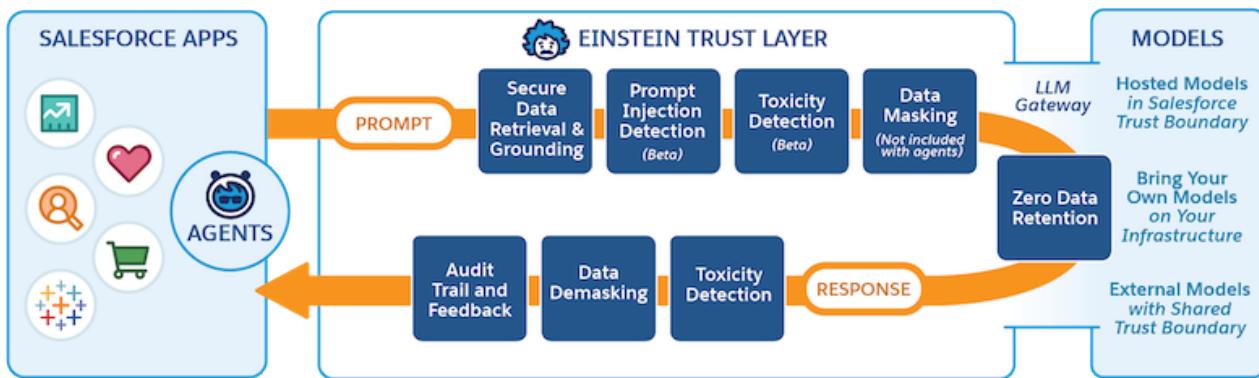
Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

To understand how the Einstein Trust Layer works, let's look at how data flows through the Trust Layer and then walk through each part of the journey in detail.

- The data in the form of a prompt, flows from CRM apps, through the Einstein Trust Layer, to the large language model (LLM), which we'll call prompt journey.
- The LLM generates a response using the prompt, which we'll call response generation.
- The generated response then flows back through the Einstein Trust Layer and back to the CRM apps, which we'll call the response journey.

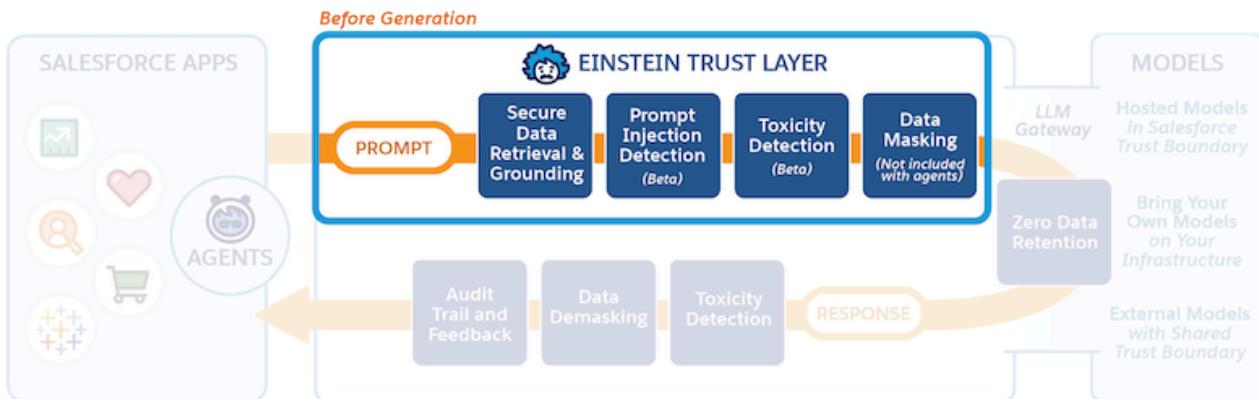
 **Note** Einstein Trust Layer capabilities apply only to generative AI and Agentforce features.

How Does It Work?



Prompt Journey

To generate a response from the LLM, you must provide it with a prompt. The prompt can come from any of the CRM apps. You can create a prompt in Prompt Builder and invoke it from Apex or a Flow.



Secure Data Retrieval and Grounding

The first step in the Trust Layer is secure data retrieval. In order for the LLM to generate a response that is more relevant and personalized, it requires additional context from your CRM data. This process of adding additional context to the prompt is what we call grounding. You can ground your prompts using merge fields with CRM data, which can be record fields, flows, Apex, Data 360 DMOs, and related lists.

Secure data retrieval means that the prompt is grounded only with data that the executing user has access to.

The data retrieval process respects existing access controls and permissions in Salesforce:

- Data retrieval for grounding the prompt is based on the permissions of the user executing the prompt.
- Data retrieval for grounding the prompt preserves in place all standard Salesforce role-based controls

for user permissions and field-level security when grounding data from your CRM instance.

The grounding is dynamic since the grounding happens at run time and depends on the user's access.

Data Masking for the LLM

Einstein Trust Layer policies include data masking, where sensitive data is detected and then masked. We identify sensitive data using two methods:

- Pattern-based: We use patterns and context to identify sensitive data in the prompt text. Specifically we use regular expressions (regex) patterns and context words. We also use machine learning models trained to identify data that don't have a defined pattern, such as names of people or companies.
- Field-Based: We use the metadata in the fields that are classified using Shield Platform Encryption or data classification to identify sensitive fields. This extends the classification that you have already applied to your data in your org to LLM data masking.

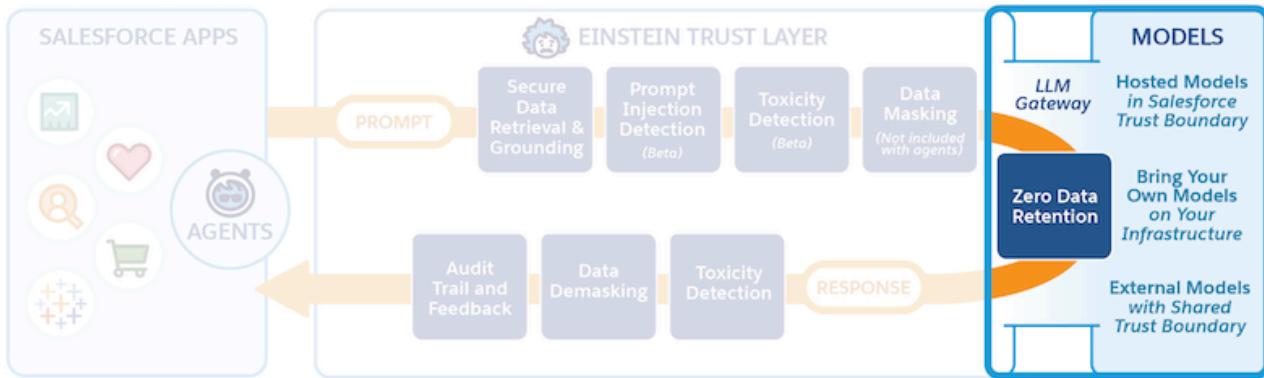
Once identified, the data is then masked with a placeholder text to prevent the data from being exposed to external models. Einstein Trust Layer temporarily stores the relationship between the original entities and their respective placeholders. The relationship is used later to demask the data in the generated response.

 **Important** Data masking for LLMs is disabled for agents. See [Data Masking and Agents](#). For embedded generative AI features, such as [Einstein Service Replies](#), [Einstein Work Summaries](#) data masking is available, and you can configure it in Einstein Trust Layer setup.

Prompt Defense

To help decrease the likelihood of the LLM generating something unintended or harmful, Prompt Builder and Prompt Template Connect API use system policies. System policies are a set of instructions to the LLM for how to behave in a certain manner to build trust with users. For example, we can instruct the LLM to not address content or generate answers that it doesn't have information about. System policies are one way to defend against jailbreaking and prompt injection attacks.

Response Generation



After a prompt is fully hydrated and secured, it's ready to be sent through the LLM gateway. The gateway governs interactions with different model providers and represents a unified, secure way to communicate with multiple LLMs. The gateway and model providers use TLS encryption to make sure the data is secured during transit.

Models built or fine-tuned by Salesforce are hosted in the Salesforce trust boundary. External Models built and maintained by third-party providers, such as OpenAI, are in a shared trust boundary. Models that you build and maintain are hosted on your infrastructure.

We have a zero data retention policy in place with external partner model providers, such as OpenAI or Azure OpenAI. The policy states that data sent to the LLM from Salesforce isn't retained and is deleted after a response is sent back to Salesforce.

Einstein Trust Layer: The Response Journey

When the generated response is returned from the large language model, the Einstein Trust Layer applies certain policies and processes to make sure the response is safe and useful. See [Einstein Trust Layer: Response Journey](#).

See Also

[Einstein Trust Layer: Response Journey](#)

Einstein Trust Layer: Response Journey

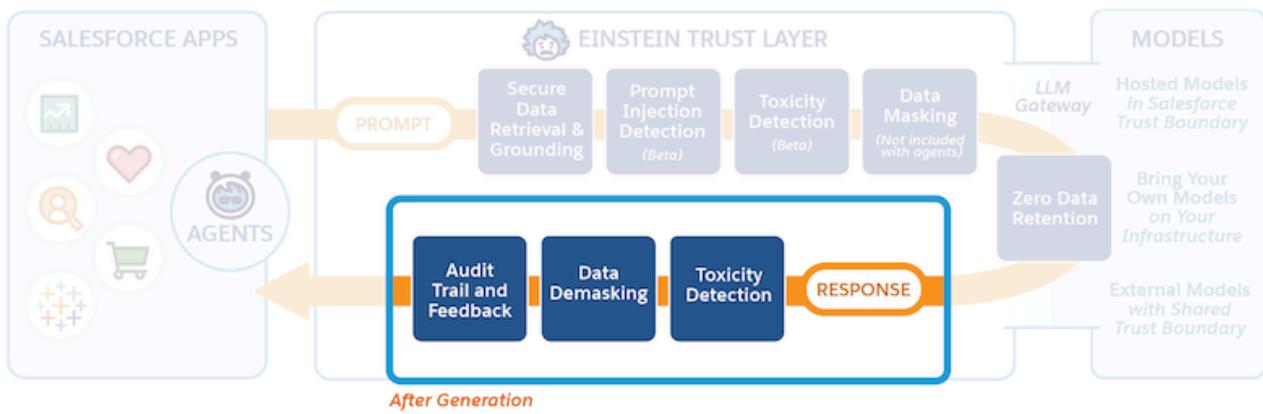
When the generated response is returned from the large language model, the Einstein Trust Layer applies certain policies and processes to make sure the response is safe and useful.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for

Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Response Journey



Toxicity Detection

Toxicity detection in responses: The generated responses are scanned for toxicity. The detection process includes a toxicity confidence score, which reflects the probability of the response including harmful or inappropriate content. The toxicity score and the categories are stored in Data 360.

Data Demasking

The placeholders we created for masking the data during the prompt journey is now replaced with the actual data. The relationship between the original entities and their respective placeholders is used to rehydrate the response so the response is useful and meaningful when sent back.

! **Important** Data masking for LLMs is disabled for agents. See [Data Masking and Agents](#). For embedded generative AI features, such as [Einstein Service Replies](#), [Einstein Work Summaries](#) data masking is available, and you can configure it in Einstein Trust Layer setup.

Citations

The response can include citations if relevant. Citations link AI-generated responses to the original source used to generate the response. Use citations to see what information was used by the large language model (LLM) to generate the response and verify the validity of the source data. Citations help you identify any potential inaccuracies or hallucinations in the generated responses, increasing your confidence in using AI tools.

Feedback and Audit

When a response is presented in Salesforce, you can accept, modify, or reject the response. You can also provide explicit feedback. Your explicit feedback on the responses is captured as part of the audit and feedback data (audit trail) and stored in Data 360. Depending on the AI feature, your implicit actions on the response can also be captured and stored in Data 360.

Audit Trail also includes the original prompt, masked prompt, scores logged during toxicity detection, the original output from the LLM, and the demasked output.

Audit and feedback data are stored in your instance of Data 360. You have control over how long that data is stored in your instance of Data 360. Additionally, audit and feedback data are stored by Salesforce for 30 days for compliance purposes.

See Also

[Einstein Trust Layer: Designed for Trust](#)

Einstein Trust Layer Region and Language Support

The Einstein Trust Layer detects and masks sensitive data such as personally identifiable information (PII) for multiple regions and languages.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Field-Based Data Masking

Field-based data masking supports all Salesforce languages. To learn more, see [Large Language Model Data Masking](#) and [Select What Data To Mask](#).

Pattern-Based Data Masking

Sensitive data is identified using two methods:

- Model-based detection: Machine learning models are trained to identify specific data types such as names of people or companies. For example, the model can scan a block of text to detect a name and categorize it as the name of a person or a company.
- Regex and context-based detection: Detection is dependent on how precisely the text matches the regular expression (regex) pattern, the uniqueness of the pattern, and the proximity of relevant context words to the pattern.

These data types are supported in English, French, German, Italian, Japanese, and Spanish:

Data Type	Pattern	Detection Method
Company Name	The name of a company or organization	Model-based
Credit Card	A 16 or 17 digit credit card number with or without spacing. For example, 4111 1111 1111 1111	Regex pattern + relevant context words
Email Address	An email address. For example, astro@salesforce.com	Regex pattern + relevant context words
IBAN Code	An International Bank Account Number (IBAN) that starts with a two letter country code, two numbers, and an account number. For example, GB29NWBK60161331926819	Regex pattern + relevant context words
Name	A person's first, middle, or last name, or a combination. Titles, such as Mr., Ms., and Mrs. are also considered.	Model-based
Passport	<p>A number listed on a passport</p> <ul style="list-style-type: none"> • English: US and UK passport number formats are supported. • French: France • German: Germany • Italian: Italy • Japanese: Japan • Spanish: Spain 	Regex pattern + relevant context words
Phone Number	<p>A phone number with or without a country code. Phone format is supported for a specific region and language.</p> <ul style="list-style-type: none"> • English-US: Area code (1 or 001) followed by a 10 digit number • English-UK: Area code (44 or 044) followed by a 10 or 11 digit number • French-France: Area code (33 or 033) followed by a 9 digit number • German-Germany: Area code (49 or 049) followed by a 6 or 8 digit number 	Regex pattern + relevant context words

Data Type	Pattern	Detection Method
	<ul style="list-style-type: none"> Italian-Italy: Area code (39 or 034) followed by a 6 or 9 digit number Japanese-Japan: Area code (080) followed by a 10 or 11 digit number Spanish-Spain: Area code (34 or 034) followed by a 6 or 9 digit number 	

These data types are supported in English (United States) only:

Sensitive Data Type	Pattern	Detection Method
United States driver's license	US driving license number. Each state has a different format. The numbers range from 7 to 14 alphanumeric characters.	Regex pattern + relevant context words
United States Individual Taxpayer Identification Number	A US Individual Taxpayer Identification Number (ITIN) that includes 9 digits that start with a nine and contains 7 or 8 as the fourth digit. For example, 9XX-8X-XXXX	Regex pattern + relevant context words
United States Social Security number	A US Social Security Number (SSN) that includes 9 digits without any spaces, or 9 digits separated by dashes or spaces or periods. For example, 254941476, 254-94-1476, or 254.94.1476	Regex pattern + relevant context words

Toxicity Detection

The Einstein Trust Layer detects toxicity in responses and assigns a score using machine learning models. This score is stored in Data 360 as part of the audit trail. To learn more, see [Toxicity Detection](#).

Language	Region / Locale	Language	Supported?
Danish	Denmark	da_DK	yes*
Dutch	Belgium	nl_BE	yes*
Dutch	Netherlands	nl_NL	yes*

Language	Region / Locale	Language	Supported?
English	Australia	en_AU	yes*
English	Canada	en_CA	yes*
English	India	en_IN	yes*
English	Ireland	en_IE	yes*
English	Singapore	en_SG	yes*
English	United Kingdom	en_GB	yes*
English	United States	en_US	yes
French	Belgium	fr_BE	yes*
French	Canada	fr_CA	yes*
French	France	fr_FR	yes
French	Switzerland	fr_CH	yes*
German	Austria	de_AT	yes*
German	Germany	de_DE	yes
German	Switzerland	de_CH	yes*
Italian	Italy	it_IT	yes
Italian	Switzerland	it_CH	yes*
Japanese	Japan	ja_JP	yes
Korean	Korea	ko_KR	yes*
Norwegian	Norway	nb_NO nn_NO	yes*
Portuguese	Brazil	pt_BR	yes*
Portuguese	Portugal	pt_PT	yes*
Spanish	Mexico	es_MX	yes*
Spanish	Spain	es_ES	yes
Swedish	Sweden	sv_SE	yes*
Thai	Thailand	th_TH	yes*

yes* = The presence of region-specific language presents difficulties in effectively identifying harmful or inappropriate content. Einstein Trust Layer doesn't always identify such content with 100% accuracy, especially when it involves region-specific language patterns.

 **Important** Although our detection models have shown to be effective during internal testing, it's important to note that no model can guarantee 100% accuracy. In addition, cross-region and multinational use cases can affect the ability to detect specific data patterns. With trust as our priority, we're dedicated to the ongoing evaluation and refinement of our models.

Prompt Injection Detection

Prompt injection detection is supported only in the English (United States) language.

Citations

Citations are supported in English, French, German, Italian, Portuguese (Brazilian) and Spanish.

Einstein Trust Layer Limits

Einstein Trust Layer is supported in the sandbox staging environments with some limits.

REQUIRED EDITIONS

Einstein generative AI is available in Lightning Experience. Setup for Einstein generative AI is available in Lightning Experience.

Available in: **Enterprise**, **Performance**, and **Unlimited** editions with the Einstein for Sales, Einstein for Platform, or Einstein for Service add-ons

Einstein Trust Layer Support in Sandbox Environments

Einstein Trust Layer is included in the sandbox staging environments to ensure your data is protected from exposure to third-party large language models (LLMs). Trust Layer features such as secure data retrieval, system policies, data masking, and toxicity detection help you safely test generative AI features.

 **Note** Data Masking isn't always available in all features. Data masking for LLMs is disabled for agents. See [Data Masking and Agents](#). For embedded generative AI features, such as [Einstein Service Replies](#), [Einstein Work Summaries](#) data masking is available, and you can configure it in Einstein Trust Layer setup.

The following Einstein Trust Layer features aren't available for testing in the staging environments:

- Grounding on Objects in Data 360.

Einstein Trust Layer Configuration in Sandbox Environments

The Einstein Trust Layer settings may not be applied correctly if your Sandbox environment is not

synchronized with your Production environment. Synchronization issues can happen during these scenarios:

- When you create a new Sandbox org with Einstein Trust Layer settings copied from your production org.
- If you enable or disable data masking for individual PII entities.

To make sure the Einstein Trust Layer settings are correctly applied in the Sandbox environment, in Einstein Trust Layer Setup page of your production environment, turn the data masking setting off, wait for about one minute, and then turn it back on.



Set up Einstein Trust Layer

Configure the Einstein Trust Layer to align with your organizational privacy and security policies and requirements.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

- Note** Before you can set up the Einstein Trust Layer, you must enable Einstein Generative AI and configure Data Cloud in your org. Data Cloud is required to ensure that the Einstein Trust Layer functions correctly and protects your data. For more support, contact your Salesforce Account Executive (AE).

These settings are applied to your Salesforce org.

1. From Setup, in the Quick Find box, enter *Einstein*, and then select **Einstein Trust Layer**. Trust Layer setup page includes two tabs, one for LLM data masking and one for content safety and security.
2. Data Masking: Data Masking is enabled by default. On the Data Masking tab, enable data masking if it's turned off to allow the Einstein Trust Layer to detect and mask sensitive data. To understand the different options available for data masking, review the content at the top of the page. Individual entities or categories can be turned off or turned on. It can take up to a few minutes for the changes to take effect.

Data masking for LLMs is disabled for agents. See [Data Masking and Agents](#). For embedded generative AI features, such as [Einstein Service Replies](#), [Einstein Work Summaries](#) data masking is available, and you can configure it in Einstein Trust Layer setup.

See Also

[Set Up Einstein Generative AI](#)

Build Trust in AI Responses with Citations

Citations link AI-generated responses to the grounding sources that are relevant to the response. Use citations to see what information the large language model (LLM) used to generate the response, and to verify the validity of the source data. Citations help you identify potential inaccuracies or hallucinations in the generated responses, increasing your confidence in using AI tools.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

About Citations

Citations are useful for several reasons.

- **Verifiability:** Users can verify the accuracy and origin of the information provided by the agent.
- **Trust:** By providing sources, the system demonstrates that the responses are data-based and trustworthy.
- **Deeper Insight:** Users can explore the source material for more detailed information.

In an agent context, citations refer to the way the system references the sources of information used to generate responses or take actions. Supported sources include knowledge articles, data from PDF files, and information from external web pages.

Source URLs can be viewed through Agent Builder, [Agent API](#), Lightning Experience, the Salesforce mobile app for Android and iOS, and Enhanced Chat.

Platform-Managed and Instructions-Based Citations

Citations can be implemented in two ways.

- **Platform-Managed Citations:** A dedicated platform service provides platform-managed citations out of the box. This service formats, displays, and links citations, ensuring a structured and consistent user experience.
- **Instructions-Based Citations:** You provide custom instructions to generate citations in prompt templates or topics.

Platform-managed citations are available at the action level and are supported for these actions.

 **Note** Platform-managed citations are only available for new agents created after May 26, 2025.

- Answer Questions with Knowledge action via Agentforce Data Library: To enable platform-based citations, see, [Show Sources for Answer Questions with Knowledge Standard Action](#).

- Custom actions built by using prompt templates: To enable service-managed citations for custom actions based on prompt templates, see [Configure Citations for Custom Actions](#). To include citations for custom actions, the prompt template must include at least 1 [Einstein Search retriever](#).

 **Note** Currently, inline citations aren't available for custom actions that are based on prompt templates.
- Citations with [Apex-based](#) agent actions.

Consider these points when choosing between platform-managed and instruction-based citations.

CONSIDERATION	PLATFORM-MANAGED	INSTRUCTION-BASED
Citation Handling	<p>Provides a structured way to handle citations with a dedicated service.</p> <p>You can benefit from the built-in functionality.</p>	<p>Allows for flexibility in how citations are formatted and presented.</p> <p>Requires you to manually add instructions and logic for generating citations.</p>
Prompt Impact	<p>Reduces the need for adding specific citation instructions within prompts and prompt fine-tuning. Useful for minimizing prompt context/word count.</p>	<p>Can consume prompt context/word count by requiring specific citation instructions.</p> <p>Can require additional fine-tuning to generate citations consistently.</p>
Display Options	<p>Are displayed in a separate Sources section at the end of the response. Inline citations are numbered links.</p> <p>Currently, inline citations aren't available for custom actions that are based on prompt templates.</p> <p>If a citation involves an image, then it's displayed as a clickable link to the image.</p>	<p>Formatting and display are defined as part of prompt instructions, which you can customize.</p>
Large Language Model (LLM)	Leverage a Salesforce managed fine-tuned language model.	Specific to the LLM selected by you and can vary depending on the LLM.

Example of Platform Citations

Here's an example of how platform citations are displayed.



Additional details and metadata related to citations are stored in Data 360 DMOs as part of the audit trail data. See the Einstein Generative AI Gateway Object Record Citation Reference DMO in [Data Model for Generative AI Audit and Feedback](#).

See Also

- [Salesforce Help: Citations in Retrievers](#)
- [Build Trust in AI Responses with Citations](#)

Configure Citation Mode for Custom Actions

With citations mode, custom actions that are created by using prompt templates can be configured to show source URLs in the generated response.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To configure citations mode for actions:

Manage AI Agents AND the required permissions for your agent type

OR

Customize Application

Action should be based on a prompt template with at least 1 [Einstein Search retriever](#).

To see citations in responses, the agent must be [activated](#).

1. From Setup, in the Quick Find box, enter `agents`, and then select **Agentforce Assets..**
2. On the **Actions** tab, click to open the custom action that you want to configure.
3. Under citation mode, Check the **Require Input** option to enable citations. When enabled, the input parameter gathers a list of sources. This input parameter is available only when the custom action is based on a prompt template.



Make sure the custom action only uses knowledge articles the requesting user can access.

Currently, inline citations aren't available for custom actions that are based on prompt templates.

See Also

[Build Trust in AI Responses with Citations](#)

Show Sources When Using Answer Questions with Knowledge Standard Action

The Answer Questions with Knowledge standard action currently supports prompt-based citations that display the source URLs at the end of the response. To include in the generated response, you must enable the option to show sources for the agent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To configure citations mode for actions:

Manage AI Agents AND the required permissions for your agent type

OR

Customize Application

To see citations in responses, the agent must be [activated](#).

1. From Setup, in the Quick Find box, enter *agents*, and then select **Agentforce Agents**.
2. Launch your agent in Agentforce Builder and from the sidebar, select **Data**.
3. Select the **Show sources** checkbox. For Knowledge based data libraries that're assigned to agents who interact with external customers, you'll need to enter the Salesforce Knowledge domain URL. If you don't include a specific Knowledge domain URL, it defaults to the publicly available URL. Learn more about [Knowledge domains](#).
4. Save your work.

At run time, citations appear at the end of a response as a numbered, clickable list of original sources used to generate the response. The inline numbers refer to the source number in the list. If a citation involves an image, then the response includes a clickable link to the image.

See Also

[Build Trust in AI Responses with Citations](#)

Content Safety and Security

Einstein Trust Layer includes a set of policies to help detect potentially harmful content and malicious attacks that attempt to compromise the safety and security of AI applications.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Harmful Content

Harmful content refers to information that can have detrimental effects on individuals or communities. In the context of generative AI models, harmful content refers to data in prompts or responses that negatively impact mental health, behavior, or well-being. Harmful content can include toxic material such as hate and violence or content that has unfair or discriminatory patterns.

Large Language Models (LLMs) can inadvertently generate harmful content due to several reasons:

- Prompt influence: The language in the prompt directly influences the model's output. For example, if the prompt contains offensive or harmful phrases, the model can incorporate similar language in its response.
- Training data: LLMs learn from vast amounts of data, which can include biased or toxic content. If the training data contains harmful language, the model can inadvertently reproduce it.
- Contextual patterns: LLMs generate responses based on statistical patterns in the data. If harmful language appears frequently in similar contexts, the model can replicate those patterns.
- Fine-tuning and transfer learning: Fine-tuning LLMs on specific tasks can introduce biases. Transfer learning from unrelated domains can also affect content generation.

Einstein Trust Layer uses machine learning models to identify harmful content in generative AI applications and features.

Prompt Injections

Prompt injections are attempts to make the LLM do something that it isn't designed to do. Hackers can create prompts that attempt to override the system policies or manipulate the LLM into doing something unintended.

Salesforce provides prompt defense mechanisms to help mitigate risks posed by malicious attacks.

Prompt injection detection together with the system policies provide an in-depth approach to prompt defense. Prompt injection defense is consistently applied to all user prompts, bolstering security in Agentforce and embedded AI applications.

- We have built-in system policies to help limit hallucinations and decrease the likelihood of unintended or harmful outputs by the LLM.
- Prompt injection detection is used to help detect malicious attacks that attempt to manipulate the LLMs into doing something it wasn't designed to do.

See Also

[Toxicity Detection](#)

[Prompt Injection Detection \(Beta\)](#)

Prompt Injection Detection (Beta)

Prompt Injection, sometimes referred to as “jailbreak,” is a large language model (LLM) vulnerability. Prompt injections are attempts to make the LLM do something that it isn’t designed to do. Hackers can create prompts that attempt to override the system policies or manipulate the LLM into doing something unintended.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Prompt injections can be introduced directly in the prompt text or indirectly through data sources included in the prompt.

Salesforce Prompt Injection Detection models recognize these types of prompt injection attacks:

Type	Description
Pretending (role-play)	Prompts that instruct the AI to adopt a different system persona with malicious intent, and use deceptive or misleading language to manipulate it in social engineering attacks
Privilege escalation or attempts to change system rules	Prompts that have harmful commands to get around or change system rules and bypass safety training for language models, including attacks that break security restrictions such as Do Anything Now (DAN) jailbreak attacks
Prompt leakage intent	Prompts designed to gather sensitive information from the language model, such as the system policies and knowledge documents, to gain unauthorized information
Encoding attacks	Using obfuscated or hidden messages in prompts to make a language model produce malicious,

Type	Description
	unaligned, or toxic content
Privacy attacks	Prompts that try to get personal or confidential information to gain unauthorized access to data or misuse the information
Malicious code generation	Prompts that attempt to produce harmful computer code, such as malware, viruses, or tools or software designed to commit fraud and other malicious intent.

If prompt injection is detected, the content is rated and the score is logged in the audit trail and stored in Data 360. You can view prompt injection scores in Data 360 DMOs.

 **Important** Although our prompt injection detection models have shown to be effective during internal testing, it's important to note that no model can guarantee 100% accuracy. With trust as our priority, we're dedicated to the ongoing evaluation and refinement of our models.

See Also

[Turn On Prompt Injection Detection for Prompts \(Beta\)](#)

Turn On Prompt Injection Detection for Prompts (Beta)

Turn on prompt injection detection in Einstein Trust Layer Setup to monitor content that attempts to make the large language model do something that it isn't designed to do. These settings are applied at the Salesforce org level.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To turn on prompt injection detection:

[View Setup](#)

AND

[Customize Application](#)

Einstein Generative AI must be enabled.

 **Note** Prompt Injection Detection is a beta feature.

- From Setup, in the Quick Find field, enter *Einstein*, and then select **Einstein Trust Layer**.



Note If you can't find **Einstein Generative AI Setup**, make sure that your org meets the prerequisites for any generative AI features you plan to use. For more support, contact your Salesforce account executive (AE).

- Click **Safety & Security**.

- Review the beta service terms. Turn on prompt injection detection.

- Use the [reports and dashboards in Data 360](#) to see if prompt injections have been detected.



See Also

[Prompt Injection Detection \(Beta\)](#)

Toxicity Detection

Einstein Trust Layer uses machine learning (ML) models to identify and flag toxic content in prompts and responses.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Customer-facing outputs from your AI applications represent your company's brand and voice. AI can sometimes generate toxic or harmful content that can lead to reputation harm to your company. Toxicity in responses can also be influenced by prompts, so it's also important to detect toxicity in prompts as well as in responses. Toxicity in prompts can come from untrusted sources such as public chat interactions and third-party web content.



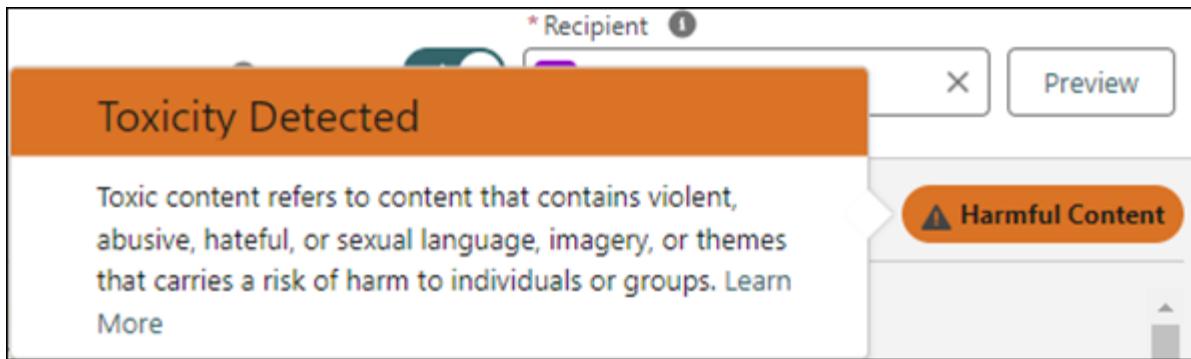
Note Toxicity Detection in responses is enabled by default and can't be changed. Toxicity Detection in prompts (beta) is turned off by default, but you can enable it for your Salesforce org.

When toxicity is detected in prompts or responses, you see a notification or a warning in the Salesforce AI features at run time. For example, you see toxicity warnings in copilot or prompt builder if toxic content is detected in the generated response from the LLM.



Note Disclaimer: Toxicity warning isn't available in all AI features.

Toxicity Warning in Prompt Builder



! **Important** Although our toxicity detection models have shown to be effective during internal testing, it's important to note that no model can guarantee 100% accuracy. In addition, cross-region and multinational use cases can affect the ability to detect specific data patterns. With trust as our priority, we're dedicated to the ongoing evaluation and refinement of our models.

Toxicity Categories

Einstein toxicity detection models recognize these categories:

Category	Type of Content
Violence	Content that depicts, references, or incites behavior intended to cause physical harm to people, animals, or property
Sexual	Content that depicts, references, or solicits material, behavior, or language containing sexual language, imagery, or themes, including consensual and nonconsensual sexual content, illegal and legal sexual acts and behaviors, and sexually suggestive and flirtatious content
Profanity	Content that includes inflammatory, offensive, obscene, vulgar, or irreverent language, gestures, and expletives
Hate	Content that depicts, references, or incites behavior or language intended to cause psychological harm to a person or group on the basis of identity or other distinguishing personal traits
Physical	Content that depicts, references, encourages, or enables the use, acquisition, or distribution of illicit substances, nonprescription medication, and other substances that have a physiological or psychological effect when consumed or, behavior

Category	Type of Content
	intended to cause physical harm, self-harm, or death

Toxicity Scoring

Each category of toxic content is rated to indicate the likelihood of that type of toxic language in the text. Additionally, the Einstein Trust Layer gives an overall toxicity score that reflects the combination of all detected categories.

The scores range from 0 to 1, with 1 being the most toxic. The scores are logged in an audit trail and stored in Data 360. The Trust Layer prebuilt reports and dashboards visualize toxicity trends in features and time. You can also create custom reports in Data 360.

See Also

[Turn On Toxicity Detection For Prompts \(Beta\)](#)

Turn On Toxicity Detection For Prompts (Beta)

Turn on toxicity detection in prompts so you can monitor the prompts that have toxic language and modify them accordingly. These settings are applied to your Salesforce org.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To turn on toxicity detection in prompts: View Setup

AND

Customize Application

Einstein Generative AI must be enabled.

Toxicity detection in responses is turned on by default and can't be turned off. By turning on toxicity detection in prompts, you can monitor prompts that have problematic language that can lead to toxicity in responses.

 **Note** Toxicity Detection in prompts is in Beta.

1. From Setup, in the Quick Find field, enter *Einstein*, and then select **Einstein Trust Layer**.

 **Note** If you can't find **Einstein Generative AI Setup**, make sure that your org meets the prerequisites for any generative AI features you plan to use. For more support, contact your Salesforce account executive (AE).

2. Click **Safety & Security**.
3. Review the beta service terms. Turn on toxicity detection in prompts.
4. Use the [reports and dashboards in Data Cloud](#) to review and analyze the toxicity scores and trends.



See Also

[Toxicity Detection](#)

Large Language Model Data Masking

The Einstein Trust Layer identifies and masks sensitive information in the prompts before sending them to the large language model (LLM). The Einstein Trust Layer uses data masking to protect sensitive data such as personally identifiable information (PII) from being exposed to external LLMs.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

The Einstein Trust Layer provides two types of data masking. The types are based on the method used to identify the type of data.

- Pattern-based: Einstein Trust Layer uses advanced pattern matching and machine learning techniques to detect sensitive data in prompts.
- Field-based: Einstein Trust Layer uses metadata to identify Salesforce CRM fields that are classified or tagged for security measures.

Data masking involves replacing the sensitive data with placeholder text based on what it represents.

You can [select](#) what data to mask in Einstein Trust Layer Setup.

Important

- Data masking through Einstein Trust Layer is disabled for agents. See [Data Masking Limitations in Agentforce](#)
- LLM Data Masking isn't always available in all features. Refer to the feature documentation for more information.
- Pattern-based data masking: Although our detection models have shown to be effective during internal testing, it's important to note that no model can guarantee 100% accuracy. In addition,

cross-region and multicountry use cases can affect the ability to detect specific data patterns. With trust as our priority, we're dedicated to the ongoing evaluation and refinement of our models.

- Field-Based masking supports only merge fields that are referenced in record merge fields and related lists.

Pattern-Based Masking

Depending on the type of data, we use specific text patterns and context or machine learning models to identify sensitive data. Here are a couple of examples that can help illustrate how pattern-matching and machine learning models work.

- Social Security number (SSN): SSNs are identified based on the number of digits and the format. The proximity of terms like “SSN” or “social” helps in identifying the number as a social security number.
- Name: Names of individuals or companies are varied and don't have a specific pattern. We use a machine learning model that is trained to recognize names and to classify them as names of individuals or companies.

For a full list of data types supported for pattern-based masking, see [Einstein Trust Layer Region and Language Support](#).

Field-Based Masking

Field-based masking in Einstein Trust Layer uses metadata from Salesforce fields to identify and mask sensitive data with placeholders. This type of masking builds upon existing security controls like Platform Shield Encryption and Data Classification, which include compliance categories and sensitivity levels.

Field-based masking is applied in Prompt Builder and other AI features using prompt templates. When merge fields in a prompt template have Platform Shield Encryption or data classification tags, Einstein Trust Layer masks the information in these fields before sending it to the LLM for response generation.

Demasking

After the LLM returns a response, the Einstein Trust Layer demasks the data that was originally masked. The response you see contains the actual data.

You can [select](#) what data to mask in Einstein Trust Layer Setup.

You can verify data masking in action in Prompt Builder. You can also track data masking and view the masked data by using the audit trail stored in Data 360.

See Also

[Select What Data To Mask](#)

Einstein Trust Layer Region and Language Support

LLM Data Masking Considerations and Limitations

Make sure you review these considerations and limitations before configuring large language model (LLM) data masking.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Limitations

- LLM Data Masking isn't always available in all features. Refer to the feature documentation for more information.
- Data masking for LLMs is disabled for agents. See [Data Masking and Agents](#). For embedded generative AI features, such as [Einstein Service Replies](#), [Einstein Work Summaries](#) data masking is available, and you can configure it in Einstein Trust Layer setup.
- Pattern-Based Masking: Although our detection models have shown to be effective during internal testing, it's important to note that no model can guarantee 100% accuracy. In addition, cross-region and multi-country use cases can affect the ability to detect specific data patterns. With trust as our priority, we're dedicated to the ongoing evaluation and refinement of our models.
- Field-Based Masking: Field-based masking is supported in Prompt Builder and AI features that use prompt templates. Field-based masking can only be used only for merge fields in prompts that reference record fields and related lists.

Considerations

Data masking can affect LLM prompt grounding. We recommend that you test any masking configurations to ensure high quality LLM responses. Use the audit trail to [verify masking behavior](#).

Consider these differences when configuring pattern-based and field-based masking:

pattern-based	field-based
Automatic detection by Einstein Trust Layer based on pattern matching, context, or machine learning models.	Detection is based on Data Classification tags in Salesforce fields configured by you.
Applied to all text in the prompt, including unstructured inputs like freeform text, as well as merged information from Salesforce fields.	Applied to only merge fields in prompt templates. Supported data sources: Record fields and related

pattern-based	field-based
	lists.
Supports only a discrete list of data types and languages.	Any field in Salesforce org can be classified and used for field masking.

To make sure your data masking configuration is more comprehensive, apply data classification to Salesforce fields and turn on data masking in Einstein Trust Layer setup for the relevant classification types. Enabling pattern-based masking can be an additional layer of protection because it evaluates the entire text in the prompt for sensitive data.

Select What Data To Mask

Select which data you want to mask and prevent exposure of sensitive data to the large language model (LLM). These settings are applied to your Salesforce org.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To select what data to mask:

View Setup

AND

Customize Application

Einstein Generative AI and Data Masking must be enabled.

Data masking for LLMs is disabled for agents. See [Data Masking and Agents](#). For embedded generative AI features, such as [Einstein Service Replies](#), [Einstein Work Summaries](#) data masking is available, and you can configure it in Einstein Trust Layer setup.

At initial setup, the most commonly used entries are turned on, and less frequently used entries are off.

- From Setup, in the Quick Find box, enter *Einstein*, and then select **Einstein Trust Layer**.



Note If you can't find **Einstein Generative AI Setup**, ensure that your org meets the prerequisites for any generative AI features you plan to use. For more support, contact your Salesforce Account Executive (AE).

- Select **Go to Einstein Trust Layer**
- Turn on large language model data masking.
- Review the list of data types included in the pattern-based masking section and make changes as

needed. Some data types are turned on for data masking by default.

5. Turn on data masking for Shield Platform Encryption, compliance categories, and data sensitivity levels. Confirm that the sensitive fields that must be masked are tagged with the correct compliance categories and data sensitivity levels in Object Manager.

You see the Shield Platform Encryption option in Einstein Trust Layer setup only if you enabled it in your org.

See Also

[Large Language Model Data Masking](#)

[Einstein Trust Layer Region and Language Support](#)

Audit Trail

Track the use of generative AI in your Salesforce org and ensure that AI usage complies with your security, privacy, regulatory, and AI governance policies.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Generative AI audit data (also known as audit trail) includes data about the Einstein Trust Layer features such as data masking and toxicity scores.

Audit trail along with feedback data is stored in Data 360. Use Data 360 reports to see how the Einstein Trust Layer protects your sensitive data from exposure to external large language models (LLMs). Einstein Trust Layer also verifies the safety and accuracy of the responses generated by the LLM. For example, if data masking is enabled for your org, generative AI data includes the masked prompt text that was sent to an external LLM. Similarly, you can also see the response generated by the LLM and the full unmasked response that was served to the user.

To access the data stored in Data 360, you'll need to [turn on the Einstein generative AI data collection and storage](#) and [install](#) the report package.

See Also

[About Generative AI Audit and Feedback Data](#)

[Set Up Einstein Generative AI Audit and Feedback](#)

[Verify Masked Data](#)

[Review Toxicity Scores](#)

Verify Masked Data

After you have configured data masking to in the Einstein Trust Layer Setup, you'll want to verify that sensitive data is masked and also monitor it over time.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder: Prompt Template Manager permission set

To view and access reports and dashboards Data Cloud User

There are two ways in which you can verify what data is masked.

- Using Prompt Builder, you can see what data will be masked at run time. See [Get to Know Prompt Builder](#).
- To monitor data masking activity, build a standard Data 360 report to confirm that sensitive data, such as credit card or phone numbers, are properly masked in your LLM prompts. The following steps walk you through the steps to creating a Data 360 report.

Before you can view data in Data 360, you must [Turn on Einstein Generative AI Data Collection](#).

1. From Data Cloud, on the Reports tab, click **Reports**.
2. In the Data Cloud report category, select the **GenAIGatewayRequest** report. This report uses the Generative AI Request data model object (DMO).
3. Click **Start Report**.
4. Add columns to the report.

Here's a list of columns to add:

- Timestamp
- Model
- # promptTokens
- Prompt
- MaskedPrompt

5. Run the report. The report lists all prompts with the data and their corresponding masked text.

Review Toxicity Scores

Build a standard Data 360 report to review toxicity scores in the responses generated by the large language model (LLM). You can also use the pre-built dashboards and reports to review toxicity trends.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for

Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Einstein Generative AI Audit and Feedback Data reports package must be installed.

1. From Data Cloud, on the Reports tab, click **Reports**, then **New Report**.
2. In the Data Cloud report category, select the **GenAIGatewayResponse with GenAIContentCategory** report.
3. Click **Start Report**.
4. Add columns to the report. Here's a list of columns to add:
 - Timestamp
 - ResponseText
 - DetectorType
 - Category
 - Value
5. Select the **Filters** panel. Choose **Detector Type** for the field, select **Equals** for the operator, and select **toxicity** for the value.
6. Run the report.

Your report shows each response and its toxicity scores.

 **Note** When the **isToxicityDetected** field is true, it indicates a high level of confidence that the content contains toxic language. However, when the **isToxicityDetected** field is false, it doesn't necessarily mean there isn't toxicity, but rather, that the model didn't detect toxicity in the content. The model is trained to provide scores from 0 through 1.

- The score for the safety category ranges from 0 through 1 with 1 being the safest. We consider a safety score that is between 0.5 and 1 as safe.
- The scores for all other categories indicate the toxicity in each category, and range from 0 through 1, 1 being the most toxic. We consider toxicity scores of 0.5 and above as toxic for that category.

Prompt Builder

Create, test, revise, customize, and manage prompt templates that incorporate your CRM data from merge fields that reference record fields, flows, related lists, Apex, and more.

REQUIRED EDITIONS



Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

	<h3>Get Started with Prompt Templates</h3> <ul style="list-style-type: none"> Ingredients of a Prompt Template Prompt Fundamentals Get to Know Prompt Builder
	<h3>Customize a Standard Template</h3> <ul style="list-style-type: none"> Enable Prompt Builder Prompt Template Types Prompt Builder Basics
	<h3>Build a Custom Prompt Template</h3> <ul style="list-style-type: none"> Best Practices for Building Prompt Templates Ground Prompt Templates with Salesforce Resources Use Example Prompt Templates Quick Start: Prompt Builder
	<h3>Monitor and Improve Prompt Templates</h3> <ul style="list-style-type: none"> How Users Work with a Prompt Template Evaluate the Quality of a Response Prompt Template Output Languages Give Users Access to a Prompt Template
	<h3>Power Agents with Prompt Templates</h3> <ul style="list-style-type: none"> Agents and Agentforce Basics Prompt Builder in Action Unleashing Agent Actions for Success Create an Answer Questions with Knowledge Prompt Template

[Prompt Template Actions in Flow Builder](#)[Prompt Template Batch Processing in Apex](#)

Get to Know Prompt Builder

Prompt Builder features a guided, visual layout that takes you through each stage of your prompt's lifecycle, from creation, to testing, and activation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Navigate the Prompt Builder UI

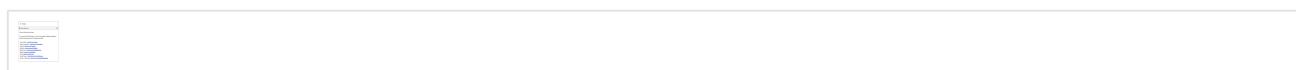
Prompt Builder features a guided, visual layout that takes you through each stage of your prompt's lifecycle, from creation, to testing, and activation. The intuitive design helps you understand how a prompt is constructed and how it performs at each step.

 **Note** This feature is part of Summer '25. Org availability may vary depending on the release upgrade schedule. Some customers may not see the feature immediately.



Build Your Prompt Template (1)

Craft your prompt template by using merge fields to personalize responses based on real org data.



- Type an @ symbol or select **Insert Resources** in the Prompt section to search for and insert merge fields. Adding resources ensures that your prompts are grounded in org data and generate relevant responses.
- Select Copy () to quickly copy the prompt to your clipboard. The copy icon is also available in the Resolved Prompt and Response sections to easily reuse content.

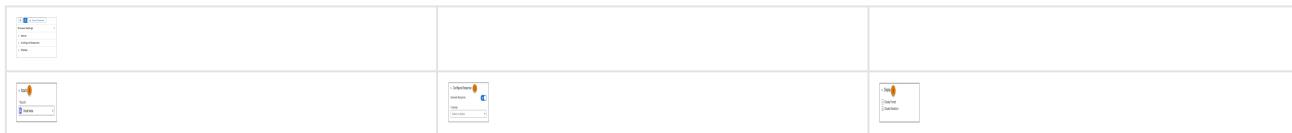
Template and Preview Settings (2)

Take control of how your prompt behaves with the Template and Preview Settings.



Template Settings

- View your template type (1).
- Edit the prompt template name and description after drafting (1).
- After creating the template, you can no longer modify the template API name (1).
- View the inputs required by this prompt template. For example, the Sales Email prompt template uses primary and related objects, while Flex templates use different inputs based on the use case (2).
- Select and test LLM models with your prompt template. Quickly access the accepted file types and sizes and the exclusion process if a file exceeds the limits (3).
- Select the allowed languages that the LLM can use to generate your prompt's response when the outputLanguage parameter is specified during template invocation. See [Supported Languages in Prompt Template Responses](#).



Preview Settings

- Select sample data to preview how your prompt's output appears in production (1).
- When Generate Response is turned off, only the resolved prompt is shown. The prompt isn't sent to the LLM, and no response is generated (2).
- Customize what's visible in the Step-by-Step Layout (3).
 - Show or hide the Prompt.
 - Show or hide the Resolved Prompt.
 - Focus only on the Response for a clean preview output.

Review the Resolved Prompt (3)

In the Resolved Prompt section, you can view how test inputs are merged into your prompt template. This version of the prompt template represents what is sent to the LLM, with actual org data applied.

- Verify that all merge fields are correctly resolved.
- Ensure that the structure of the prompt is clear and complete.
- Use Copy () to quickly add the resolved prompt to your clipboard.

Data Trust and Masking



If your prompt template includes sensitive data, it's automatically replaced with a placeholder in angle brackets before being sent to the LLM. For example, <AccountName>. The Einstein Trust Layer masks

sensitive values to protect customer information.

When the response is returned, the original values are automatically reinserted and displayed in italics in the Response section.

To turn on masking and verify that it's configured properly, go to the [Einstein Trust Layer Settings](#) in Setup.

Preview the LLM Response (4)

The Response section displays the final output generated by the LLM based on your resolved prompt. This preview shows exactly what a customer or user sees, helping you to evaluate the clarity, tone, and accuracy of the response.



Use the icons at the top of the Response section to gain deeper insights and take action.

- **View Rendered Response:** Click the document icon () to view the model's response as formatted output, based on the selected response format. Use this view to inspect how default formatted responses containing markdown or HTML formatted responses will appear when rendered in Salesforce.
- **View Raw Response:** Click the command line icon () to view the raw output exactly as returned by the model. This lets you review the unformatted response and inspect the structure before any rendering is applied.
- **View Masking Details:** Click the shield () to view which placeholders were used for sensitive org data and how that data was masked before the prompt was sent to the LLM. The placeholders are replaced with real data after the response is received so that you can inspect what was protected and how it maps to the final output.
- **Toxicity Warning:** If applicable, a numeric value indicating the number of warnings in the response is shown next to the triangle, .
- **Copy Response:** Select the Copy () to quickly copy the generated response to your clipboard. If the response includes rich text, the format that's copied is JSON.

Save and Activate (5)

When you're ready, use the Save and Activate panel to:

- Save your draft
- Activate the prompt template for use across your org.

Put Prompts to Work in Salesforce

After activation, your users can benefit from prompt templates directly within Salesforce apps like Sales Emails and Lightning record pages. To see how users interact with prompts, see [How Users Work with a](#)

[Prompt Template](#).

Key Tasks in Prompt Builder

- [Create a Prompt Template](#)
- [Ground Prompt Templates with Salesforce Resources](#)
- [Change LLM Configurations in Prompt Templates](#)
- [Enabling Resolution to Review a Prompt Template](#)
- [Evaluate the Quality of a Response](#)
- [Activate and Deactivate Prompt Templates](#)

See Also

[Video: Get to Know Prompt Builder](#)

Prompt Builder Key Concepts

Learn the key concepts and vocabulary used throughout Prompt Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Prompts

Generative language models are versatile and can create different types of responses. To produce a response, tell the LLM what you want in the form of a prompt. Prompts determine the quality and relevance of the LLM's response, so it's important to craft prompts that the model can understand and use.

Prompt Design

Prompt design is the process of creating prompts that improve the quality and accuracy of the model's responses. Many models expect a certain prompt structure, so it's important to test and iterate them on the model you're using. After you understand what structure works best for a model, you can optimize your prompts for the given use case. To scale the prompt design process, create reusable prompts called prompt templates.

Prompt Templates

Behind the scenes, Einstein generative AI uses prompt templates. Prompt templates are reusable, detailed prompts that you can create and manage in Prompt Builder. These templates are use case-

driven and include the information that helps the LLM generate a high-quality response, such as a goal, constraints, and brand guidelines. And to make sure that the prompts you send to the LLM are grounded in the most up-to-date data, prompt templates include placeholders for information that changes, such as customer names, contact information, and product prices.

Grounding

Grounding improves responses by connecting your prompt to data that's relevant to your request. Without grounding, a model's response can contain generic or irrelevant details. The LLM uses your Salesforce data or uploaded files to add context and personalization to your prompts. In Prompt Builder, you can ground prompts using merge fields that reference record fields, flows, Apex, and uploaded files. The LLM uses the grounding data along with the original, generic data that it was trained on.

The Einstein Trust layer masks sensitive data from the LLM by sending placeholder text instead. To see the placeholder text, look at the Resolved Prompt. In the response, you can see the demasked data added back in by Salesforce. You can see a summary of all masked data for the response in the Data Masking Details dialog.

To learn more about how Einstein keeps your data secure, see [Einstein Trust Layer](#).

Prompt Template Type

Prompt template types help you to create a prompt template for your particular use case. For example, a Sales Email prompt template helps your sales team to draft personalized emails for a contact or a lead.

Prompt Instructions

Prompt instructions are natural language instructions in a prompt template. Instructions describe a task for the LLM, such as "Write a description no longer than 500 characters." Add instructions to a prompt template, and then relevant CRM data replaces the template's placeholders. The prompt template is now a grounded prompt and sent to the LLM.

Prompts and Prompt Templates

Behind the scenes, large language models (LLMs) power Einstein generative AI. An LLM can help your users with many language-based tasks. For example, it can generate a personalized email to a customer or analyze customer feedback and extract key insights. But an LLM can't create great content by itself—it needs guidance from you in the form of a prompt.

A prompt is the set of instructions that you give an LLM. It provides specific contextual information, data, instructions, and constraints that help the model generate accurate and personalized output. The output that the LLM generates is called a response.

 **Example** This prompt instructs the LLM to create a summary of open cases for the Astro's Bakery

account.

You're a support representative and you need to create a short summary of all open cases for the Astro's Bakery account.

When I ask you to summarize the open cases, you must strictly follow my instructions below.

Instructions:

"""

Summarize the open cases in one paragraph no more than 500 characters. Mention how many open cases there are and what the case issues are.

Use clear, concise, and straightforward language using active voice and strictly avoiding the use of filler words and phrases and redundant language.

Use the following information to write the summary:

Case #1 details: The widgets we received are the wrong size. We needed a widget in size A, but we received a widget in size B.

Case #2 details: Our widgets haven't been delivered. We can't track our order. According to the last tracking update, the widgets should have arrived on June 5. Now it's June 10, and they still haven't arrived.

Do not attribute any positive or negative traits in the summary.

"""

Now create the summary.

The LLM generated this summary.

There are two open cases for the Astro's Bakery account. In Case #1, the issue is that the received widget is the wrong size. The requested size was A, but size B was received instead. In Case #2, the issue is that the widgets haven't been delivered and the order cannot be tracked. The expected delivery date was June 5, but as of June 10, the widgets have not arrived.

The quality of an LLM's response depends on the prompt's specificity. Vague or inaccurate instructions can lead an LLM to produce an irrelevant or a biased response. Sometimes an LLM can even hallucinate and generate false information. And because you make a new call to the LLM every time you run a prompt, its responses can differ, even if you're passing in the exact same prompt. To prevent hallucinations and to minimize variability between responses, create a prompt with as much specific data as possible. It's important to review and edit your prompt until you consistently achieve high-quality, accurate responses.

The process of creating and iterating on a new prompt to generate just one high-quality response can be time-consuming. It's even harder to design dozens of original prompts, each with different data and specifications. Also, prompts created by different people can produce inconsistent output due to variations in writing style. To scale prompt design efficiently, it's best to use a prompt template, which is a reusable prompt. A prompt template includes placeholders for specific details about customers, products, and more.

 **Example** This prompt template instructs an LLM to generate a summary of an account's open cases. Unlike the previous example prompt, this prompt template doesn't specify an account name or describe current open cases. Instead, the prompt template contains merge fields, such as `{!$Input:Account.Id}`, as placeholders.

```
You are a support representative and you need to create a short summary of all open cases for account {!$Input:Account.Id}.
```

When I ask you to summarize the open cases, you must strictly follow my instructions.

Instructions:

```
"""
```

Summarize the open cases in one paragraph no more than 500 characters. Mention how many open cases there are and what the case issues are.

Use clear, concise, and straightforward language using active voice and strictly avoiding the use of filler words and phrases and redundant language.

Use the following information to write the summary:

```
{!$Flow:Get_Open_Cases_for_Account}
```

Do not attribute any positive or negative traits in the summary.

```
"""
```

Now create the summary.



Note The `{!$Resource}` wrapper syntax displays as `Resource` in the Prompt Builder UI. The wrapper syntax enables you to copy and paste the text into the Prompt Template Workspace with correctly configured resources.

Prompt Builder replaces the placeholders in your template with your real data. The result is a prompt that's tailored to the data that you selected. This process of populating a prompt template with specific data is called prompt resolution. An example of a resolved prompt is the prompt about the two open cases for the Astro's Bakery account. With Einstein, prompt resolution is as easy as selecting Salesforce records to associate with the prompt.

Using prompt templates is ideal for B2C communications because they can generate consistent and data-driven output at scale. Templates that contain the same brand guidelines generate content with a unified voice and style. Each template is developed for a specific use case, and you can reuse it by tailoring the prompt with different data.

See Also

[Get to Know Prompt Builder](#)

[Prompt Builder](#)

Enable Prompt Builder

Enable Einstein in your organization and assign users the appropriate permission set to use Prompt Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder: Prompt Template Manager permission set

To access and run prompt templates outside Prompt Builder Prompt Template User permission set

 **Note** If you're working from a scratch org, add Prompt Builder to your definition file before enabling Einstein. See [Scratch Org Features](#).

1. Follow [Set Up Einstein Generative AI](#).
2. (Optional) To use prompt templates with sales emails, activate Sales Emails.
 - a. From Setup, in the Quick Find box, enter *Einstein Sales*, and then select *Einstein for Sales*.
 - b. Enable Sales Emails. It can take a few minutes before the feature is ready to use.
3. Assign the Prompt Template Manager permission set to users that need to create and manage prompt templates in Prompt Builder.
 - a. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
 - b. From the Permission Sets list view, click **Prompt Template Manager**.
 - c. From the Prompt Template Manager detail page, click **Manage Assignments** and **Add Assignments**.
 - d. Select the checkboxes next to the names of the users, including yourself, that you want assigned to the permission set, and click **Next**. To add a user to the Prompt Template Manager permission set, the user must have access to Setup.
 - e. Click **Assign**.

Assign the separate **Prompt Template User** permission set for end users that need to access and run prompt templates.

4. Refresh the page so that Prompt Builder is now visible in Setup.
5. To open Prompt Builder from Setup, in the Quick Find box, enter *Prompt Builder*, and then select **Prompt Builder**.



See Also

[Create a Prompt Template](#)

Prompt Template Run-time Execution

Invoking a prompt template at run time sets off a chain of events. The run-time life cycle of a prompt template begins with loading the prompt template with input and concludes with forwarding the LLM-generated response to the calling agent or app.

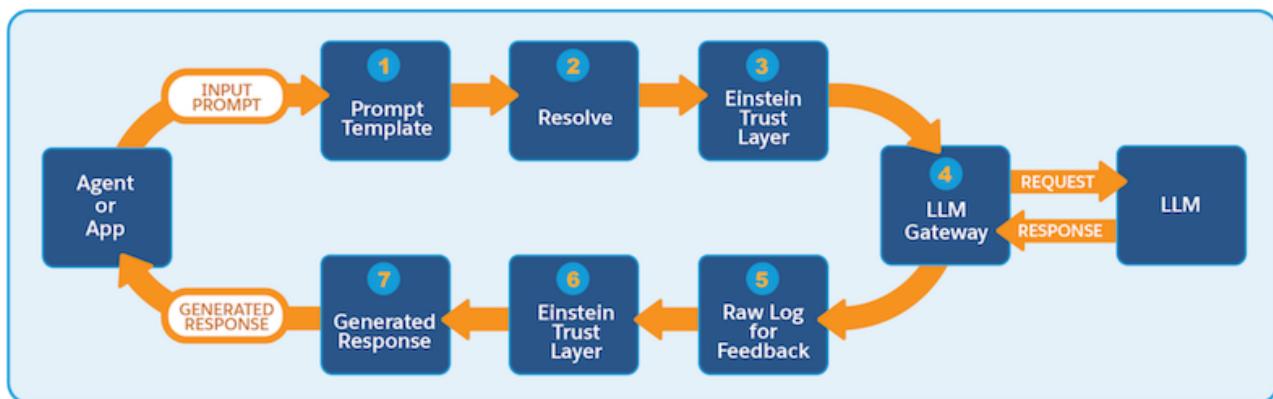
Design-time Preview

When you design a prompt template, Prompt Builder's preview feature allows you to simulate a complete run-time experience. You preview the prompt template, provide input, preview the resolved prompt, and then get the generated response returned from the LLM.

Prompt Execution at Run Time

When an agent or app invokes an activated prompt template at run time, it triggers the same chain of events. Let's break it down into more detailed steps.

Prompt Template Execution Steps



Step	Description
1	The prompt template gets invoked with input from an agent, a flow, Apex, or an app.

Step	Description
2	<p>Prompt resolution begins with secure data retrievals. Values for merge fields (records, flows, Apex) are added to the prompt. Access to merge data is governed by the permissions of the executing user.</p> <p>For dynamic grounding, relevant information from structured and unstructured data in Data Cloud is retrieved using features like search retrievers, flows, and SOQL queries.</p>
3	<p>The resolved prompt then undergoes further protections using enabled features in the Einstein Trust Layer. Pattern-based data masking is applied automatically, while field-based data masking is applied if enabled.</p> <p>The Einstein Trust Layer applies prompt defense measures using Salesforce system policies.</p>
4	<p>The secured prompt is submitted to the LLM via the LLM gateway. The LLM returns its generated response via the LLM gateway.</p> <ul style="list-style-type: none"> • The generated response can include citations to original sources that the LLM used when generating the response. • The generated response can be in the user's language (default) or in a requested language. <p>For external model providers, our zero data retention policy ensures that data sent to the LLM from Salesforce isn't retained but is deleted after a response is sent back to Salesforce.</p>
5	The LLM-generated response is logged for audit and feedback .
6	The Einstein Trust Layer applies system policies to the LLM-generated response. If enabled, features like toxicity detection help decrease the likelihood of unintended or harmful outputs. If data masking is enabled, the Einstein Trust Layer demasks any masked data, replacing placeholders with their underlying values.
7	The generated response is returned to the requesting agent or app in a raw or structured format.

 **Note** Prompt resolution is sometimes called "hydration" or "prompt grounding". We refer to it as "resolution" in the context of executing prompt templates built with Prompt Builder.

Manage Prompt Templates

Fine-tune your prompt template in Prompt Builder by using versions, activation and deactivation, changing LLM configurations, and more.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

[Standard Prompt Templates](#)

Use standard prompt templates as starting points for typical use cases. You can customize a standard prompt template by copying it. You can override some standard prompt templates to create versions that work in place of the standard version.

[Manage Multi-Language Support in Prompt Builder](#)

Select, manage, and test which languages a template supports to generate output in Prompt Builder

[Activate and Deactivate Prompt Templates](#)

Use activation and deactivation of prompt templates to finely control which version your users can access.

[Use Multiple Versions of a Prompt Template](#)

Create and use multiple versions of prompt templates in Prompt Builder to compare prompt constructions and their responses.

[Change LLM Configurations in Prompt Templates](#)

Select and optionally modify an LLM configuration for generating outputs in Prompt Builder.

Standard Prompt Templates

Use standard prompt templates as starting points for typical use cases. You can customize a standard prompt template by copying it. You can override some standard prompt templates to create versions that work in place of the standard version.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Prompt templates are categorized as pilot, custom, or standard. Pilot templates are only available for a small number of users who were part of the Prompt Builder pilot program. You can't use pilot templates, but you can use their text in new templates. Custom templates are any templates that you create from scratch using the **New Prompt Template** button. See [Create a Prompt Template](#).

There are two ways to customize the behavior of a standard template.

- You can use the Save As button to create a custom template based on a standard template.
- If a standard prompt template is overridable, you can create additional versions that work in place of the standard version. Only one version is active at any time, including the original template.

You can deactivate and reactivate a template at any time. If you deactivate the original version of a standard template, your overrides are also inactive.

! **Important** Standard sales email prompts use hard-coded hyperparameters that aren't copied when using the **Save As** button to create a template. As a result, new prompt templates created this way can produce different or unexpected results compared to the standard sales email prompt templates. To get results most comparable to the standard sales email prompts, use Einstein Studio to create a Model Configuration with the following parameters:

- `model` : gpt-3.5-turbo
- `temperature` : 1.0
- `frequencyPenalty` : 1.0
- `presencePenalty` : 0.5

Standard Prompt Templates

These templates are provided by Salesforce for you to clone and modify.

Template Name	Template Type	Description	Additional Access Requirements	Considerations	Use with Agents
Create Slack Canvas Layout for Course Offering	Course Offering Slack Canvas	Creates the layout for a Slack canvas that displays the syllabus of a course offering.	Agentforce For Education Cloud, Education Cloud Full Access, Education Cloud Advanced Academic Operations for Admin	None	Yes
Create Slack Canvas Layout for Party Philanthropic Research Profile	Research Profile Slack Canvas	Creates the layout for a Slack canvas that displays a party philanthropic research profile.	Agentforce For Fundraising, Fundraising	None	Yes
Draft Service	Contextual	Determine how Einstein for	Einstein for	None	Not used with

Template Name	Template Type	Description	Additional Access Requirements	Considerations	Use with Agents
Rplies from Context - Live Chat	Service Replies	Einstein drafts replies from context in Live Chats, when you customize the Service Replies prompt templates in Prompt Builder.	Service add-on or Einstein 1 Edition		agent actions by default.
Draft Service Replies from Context - Messaging Session	Contextual Service Replies	Determine how Einstein drafts replies from context in Messaging Sessions, when you customize the Service Replies prompt templates in Prompt Builder.	Einstein for Service add-on or Einstein 1 Edition	None	Not used with agent actions by default.
Draft Service Replies with Grounding - Live Chat	Grounded Service Replies	Determine how Einstein drafts replies with grounding in Live Chats, when you customize the Service Replies prompt templates in Prompt Builder.	Einstein for Service add-on or Einstein 1 Edition	None	Not used with agent actions by default.
Draft Service Replies with Grounding - Messaging Session	Grounded Service Replies	Determine how Einstein drafts replies with grounding in Messaging Sessions, when you customize the Service Replies prompt templates in Prompt Builder.	Einstein for Service add-on or Einstein 1 Edition	None	Not used with agent actions by default.

Template Name	Template Type	Description	Additional Access Requirements	Considerations	Use with Agents
		Replies prompt templates in Prompt Builder.			
Extract Product Mentions	Extract Product Mentions	Identifies and retrieves product-related details from unstructured conversations such as Salesforce records, emails, slack messages, or call transcripts.	Einstein or Agentforce for Sales add-on or Einstein 1 Sales add-on	None	Not used with agent actions by default.
Get Learning Courses (Beta)	Search Learning Courses	Gets a list of learning courses based on the user's query.	Agentforce for Education Cloud, Access Course Search in Agentforce (Beta), SIS enabled, Education Cloud for Experience Cloud license, UniversalCredit Metering	Customers can update the prompt template. Customers also need to update the prompt with a Custom Data retriever.	Yes Education Cloud Get Learning Courses (Beta)
Get Learning Programs	Learning Program	Provides a list of available learning programs that matches the user's search criteria.	Agentforce for Education Cloud	None	Used only with agents. Student Recruitment Agent (Beta)
Journey Decisioning Content	Journey Decisioning	Generate custom message content for	Marketing Cloud Next Advanced edition and	Uses the Journey Decisioning flow, which	Used only with the Journey Decisioning agent.

Template Name	Template Type	Description	Additional Access Requirements	Considerations	Use with Agents
		each subscriber in a journey or flow.	Marketing Cloud Engagement+	calls the Marketing Cloud: Create Journey Content invocable action.	
Journey Decisioning Selection	Journey Decisioning	Determine the best journey or flow for each subscriber.	Marketing Cloud Next Advanced edition and Marketing Cloud Engagement+	Uses the Journey Decisioning flow, which calls the Marketing Cloud: Select Journey invocable action.	Used only with the Journey Decisioning agent.
Prioritize Opportunities	Record Prioritization	Creates a list of prioritized opportunity records based on user instructions or the available opportunity data.	None	Uses the Get Opportunity Details flow, which calls the Get Record Prioritization Data invocable action.	Used only with agents. Sales Prioritize Opportunities
Recommend Next Step for Opportunity	Field Generation	Suggests a Next Step for an opportunity based on related information, such as emails, notes, and call transcripts.	Agentforce for Sales add-on	None	Used only with agents. Sales Suggest Next Step for Opportunity
Recommend Stage for Opportunity	Field Generation	Suggests a stage for an opportunity based on	Agentforce for Sales add-on	Can't be cloned or modified.	Used only with agents.

Template Name	Template Type	Description	Additional Access Requirements	Considerations	Use with Agents
		related information, such as emails, notes, and call transcripts.			Sales Suggest Stage for Opportunity
Research Company Competitors	Record Research	Creates a rich-text summary of a company's top competitors and the areas in which they compete.	Einstein for Sales add-on	Calls the Einstein Search Web Retriever.	Not used with agent actions by default.
Research Company Industry Trends	Record Research	Creates a rich-text summary of trends within a company's industry and trends that affect their customers.	Einstein for Sales add-on	Calls the Einstein Search Web Retriever.	Not used with agent actions by default.
Research Company Key Performance Indicators	Record Research	Creates a rich-text summary of a company's key performance indicators (KPIs).	Einstein for Sales add-on	Calls the Einstein Search Web Retriever.	Not used with agent actions by default.
Research Company Overview	Record Research	Creates a rich-text summary that details a company's business model, industry, revenue, target market, offerings, size,	Einstein for Sales add-on	Calls the Einstein Search Web Retriever.	Not used with agent actions by default.

Template Name	Template Type	Description	Additional Access Requirements	Considerations	Use with Agents
		and notable employees.			
Research Company Strategic Priorities	Record Research	Creates a rich-text summary outlining a company's top strategic initiatives.	Einstein for Sales add-on	Calls the Einstein Search Web Retriever.	Not used with agent actions by default.
Research Company Strengths	Record Research	Creates a rich-text summary of a company's advantages relative to their competitors.	Einstein for Sales add-on	Calls the Einstein Search Web Retriever.	Not used with agent actions by default.
Research Company Weaknesses	Record Research	Creates a rich-text summary of a company's weaknesses relative to their competitors.	Einstein for Sales add-on	Calls the Einstein Search Web Retriever.	Not used with agent actions by default.
Summarize Case	Case Summary	Determine how Einstein drafts Work Summaries for Case when you customize the Summarize Case prompt template in Prompt Builder.	Einstein for Service add-on or Einstein 1 Edition	Uses the Get Case Summary Information flow which calls the Get Case Information to Summarize invocable action.	Not used with agent actions by default.
Summarize Messaging Session	Work Summary	Determine how Einstein drafts Work Summaries for Enhanced Messaging when you customize the	Einstein for Service add-on or Einstein 1 Edition	Uses the Get Transcripts for a Messaging Session flow, which calls the Get Conversation Transcript for	Not used with agent actions by default.

Template Name	Template Type	Description	Additional Access Requirements	Considerations	Use with Agents
		Summarize Messaging Session prompt template in Prompt Builder.		Record invocable action.	
Summarize Voice Call	Work Summary	Determine how Einstein drafts Work Summaries for Voice when you customize the Summarize Voice Call prompt template in Prompt Builder.	Einstein for Service add-on or Einstein 1 Edition	Uses the Get Transcripts for a Voice Call flow, which calls the Get Conversation Transcript for Record invocable action.	Not used with agent actions by default.
Summarize Advising Case	Field Generation	Creates a summary of a learner's case record of the Advising case record type.	Agentforce for Education Cloud or Einstein for Education Cloud	None	<p>Yes</p> <p>Education Cloud Summarize Advising Case</p>
Get Campus Resources (Beta)	Student Advising	Get the relevant resources from available campus resources.	Agentforce for Education Cloud	The prompt template must be configured with a custom data retriever based on a data model object.	<p>Used only with agents.</p> <p>Education Cloud Find Campus Resources</p>
	Philanthropic Research		Agentforce for Education Cloud, Access Philanthropic Research in Agentforce (Beta), UniversalCredit	The prompt template must be configured with a custom data retriever.	<p>Used only with agents</p> <p>Fundraising Summarize Philanthropic Milestones</p>

Template Name	Template Type	Description	Additional Access Requirements	Considerations	Use with Agents
			Metering		
	Philanthropic Research		Agentforce for Education Cloud, Access Philanthropic Research in Agentforce (Beta), UniversalCredit Metering	The prompt template must be configured with a custom data retriever.	Used only with agents Fundraising Summarize Wealth Capacity
Understand User Intent	Intent Retrieval	Analyzes the user's conversation to understand intent and get relevant filter criteria for product recommendations.	None	None	Used only with agents. Personalization Understand User Intent

Override a Standard Prompt Template

You can override some standard prompt templates to create one or more custom versions. Only one version can be active at a time. When you activate a standard prompt template override, it takes the place of the standard version.

See Also

[Change LLM Configurations in Prompt Templates](#)

Override a Standard Prompt Template

You can override some standard prompt templates to create one or more custom versions. Only one version can be active at a time. When you activate a standard prompt template override, it takes the place of the standard version.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

Overridable standard prompt templates are indicated in the Category column of the list of all prompt templates. You can create a new version of an overridable template using the Save As button in the prompt template workspace. If a standard template isn't overridable, you can instead copy it and create a custom template.

When you activate a custom version of a standard prompt template, it's available in the list of standard templates and uses the same name as the standard version. If you deactivate an active custom version, no version is active until you choose a version to make active.

1. To override a standard prompt template in the prompt template workspace, click **Save As** and select **Save as a New Version**. The new version becomes available in the Versions menu.
2. To activate a version, select it from the Versions menu and click **Activate**.

Manage Multi-Language Support in Prompt Builder

Select, manage, and test which languages a template supports to generate output in Prompt Builder

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

[Enable Global Language Support in Prompt Builder](#)

Enable, manage, and test global language settings for your prompt templates.

[Supported Languages in Prompt Template Responses](#)

A prompt template can use any language that Prompt Builder offers. Supported languages are optimized for business-appropriate phrasing and are integrated with the Einstein Trust Layer to use its data masking and toxicity scoring features.

[Using a Single Prompt Template for Multiple Languages](#)

In Prompt Builder, you can choose which languages a template supports to generate output. Manage which languages are permitted to make sure that responses are generated only in languages that have been tested for quality output with your prompt and languages that your organization supports or

uses fluently. If a particular language isn't specified when the template is used, Prompt Builder selects the response language for most standard features and use cases.

Enable Global Language Support in Prompt Builder

Enable, manage, and test global language settings for your prompt templates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

-
1. In Setup, in the Quick Find box, enter *Einstein* Setup.
 2. Turn on **Global Language Support for Prompt Builder**.
 3. To test language output in Prompt Builder, enter *Prompt* in the Quick Find box in Setup, and then select **Prompt Builder**.
 4. Select an existing prompt template or create a new one.
 5. In the Prompt Template Workspace, click  to open Template Settings.
 6. Scroll down to the Response section and click **Allowed Languages** to see all available Prompt Builder global languages.

See Also

[Supported Languages in Prompt Template Responses](#)

[Using a Single Prompt Template for Multiple Languages](#)

Supported Languages in Prompt Template Responses

A prompt template can use any language that Prompt Builder offers. Supported languages are optimized for business-appropriate phrasing and are integrated with the Einstein Trust Layer to use its data masking and toxicity scoring features.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Supported Languages

Prompt Builder supports these languages. Prompt Builder instructs the LLM to use business-appropriate phrasing and formats based on the locale. Some models generate responses that are close variants, but not exact matches, for the requested locale.

Language	Locale	Code
Dutch	Netherlands	nl_NL
English	United States	en_US
French	France	fr_FR
German	German	de_DE
Italian	Italy	it_IT
Japanese	Japan	ja_JA
Portuguese	Brazil	pt_BR
Spanish	Mexico	es_MX
	Spain	es_ES
Swedish	Sweden	sv_SE

Global Languages

You can enable [Salesforce-supported, end-user, and platform-only languages](#) by turning on Global Language Support in Einstein Setup. However, when using a global language, some Einstein Trust Layer features, such as data masking and toxicity scoring, may be unavailable, and responses may be less optimized for business-appropriate phrasing than in supported languages.

LLMs generally don't have official support for specific response languages, and some LLMs might not perform well for all global languages. Be sure to test your selected model with your response language to deliver a properly localized response.

See Also

[Einstein Trust Layer](#)

Using a Single Prompt Template for Multiple Languages

In Prompt Builder, you can choose which languages a template supports to generate output. Manage

which languages are permitted to make sure that responses are generated only in languages that have been tested for quality output with your prompt and languages that your organization supports or uses fluently. If a particular language isn't specified when the template is used, Prompt Builder selects the response language for most standard features and use cases.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

The default supported languages are enabled in standard and new custom templates. You can enable other languages by turning on Global Language Support in Einstein Setup. However, some [Einstein Trust Layer](#) features, such as data masking and toxicity scoring, might not be available for the added language, and responses might not be optimized for business-appropriate phrasing.

How Prompt Builder Selects the Response Language

The language used to write the prompt instructions or any response language requested in the instructions doesn't determine the output language. Instead, the execution logic determines the language used in the response. If a particular language isn't specified when the template is used, Prompt Builder selects the response language based on this order.

- Use the executing user's language if it's allowed in the prompt template.
- If the user's language isn't allowed, use the org's default language if it's allowed.
- If the org's default language isn't allowed, use English if it's allowed.
- If none of the languages are allowed in the prompt template, Prompt Builder returns an error.

If a specific output language is set using the `outputLanguage` parameter in Apex or REST API, Prompt Builder uses the specified output language if it's allowed in the prompt template. If the language isn't allowed, Prompt Builder returns an error.

See Also

[Supported Languages in Prompt Template Responses](#)

Activate and Deactivate Prompt Templates

Use activation and deactivation of prompt templates to finely control which version your users can access.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

During the process of crafting a prompt template, you typically create a few versions to test which template body, grounding data, and LLM combination yields the most satisfying response. Because of this iterative drafting process, prompt templates aren't available to your users by default. You must activate them first.

When you activate a prompt template, you're making a specific version of the prompt template available to your users. Only one version of a template can be active at a time, and if no versions are active the template becomes unavailable to your users. Activating and deactivating versions gives you the control to make available only the version of a template you want to share.

1. Begin in the Prompt Template Workspace of Prompt Builder. See [Create a Prompt Template](#).
 2. Begin drafting your prompt in the Prompt section. When you're ready to save your work, click **Save**. This prompt is now Version 1 of your prompt template, as denoted by the version number shown at the top of the Prompt Template Workspace.
 3. When you're ready to activate a template and make it available to your users, click **Activate**.
- !** **Important** Activating a template version makes it immutable. Even if deactivated, any version that was ever active remains immutable. To edit such a template, save it as a new version. See [Use Multiple Versions of a Prompt Template](#).
4. To deactivate an active template version, click **Deactivate**.

Use Multiple Versions of a Prompt Template

Create and use multiple versions of prompt templates in Prompt Builder to compare prompt constructions and their responses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
 - Execute Prompt Templates
-

When testing your prompt template drafts, you don't always get the exact response you're looking for right away. Often it takes a few tweaks and edits to grounding data, LLM, and template body text to get a response you're pleased with. Versioning is important for this reason. Prompt Builder allows you to create multiple versions of a template, so you can compare different prompt constructions and their responses while you craft the perfect prompt for your needs.

1. Begin in the Prompt Template Workspace of Prompt Builder. See [Create a Prompt Template](#).
2. Draft your prompt in the Prompt section. When you're ready to save your work, click **Save**. After you save a new prompt for the first time, it becomes Version 1 of that prompt template. The version number also becomes part of the URL, so the version can always be accessed statically via the URL.
3. Continue drafting your prompt in the Prompt section, and at any time save your changes to the current version of your prompt.
4. To create another version of your prompt template, select **Save As | Save as a New Version**. Any unsaved changes become part of the new version. Now your prompt is Version 2 of the same prompt template.

! **Important** Activating a template version makes it immutable. Even if deactivated, any version that was ever active remains immutable. To edit such a template, save it as a new version.

The version number at the top of the Prompt Template Workspace reflects the prompt template currently being edited on-screen and indicates whether it's active. When two or more versions of a prompt template exist, the version number shown becomes a dropdown menu showing a list of all versions, the time they were created, which is active, and the option to select a new version to work from.

! **Important** When a new version of a prompt template is created, it doesn't automatically become available to all your users. See [Activate and Deactivate Prompt Templates](#).

5. Turn an edited version of a prompt template into a new prompt template altogether by selecting **Save As | Save as a New Template**. Any unsaved changes become part of the new template.

! **Important** The **Save as a New Template** option isn't supported for flex prompt templates.

Change LLM Configurations in Prompt Templates

Select and optionally modify an LLM configuration for generating outputs in Prompt Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

One of the most powerful features of Prompt Builder is the ability to change the LLM configuration with only a few clicks.

Standard and Customer LLM Configurations

LLM configurations in Prompt Builder are classified as either standard or custom. Standard configurations come included with Prompt Builder. Custom configurations are brought in via BYO-LLM. Additionally, if you modify a standard configuration, the changed configuration is saved as a custom configuration.

Versions and LLM Configurations

Each version of a prompt template can contain a different model configuration. Only the configuration model in the activated version is used.

! **Important** Activating a template version makes it immutable. Even if deactivated, any version that was ever active remains immutable. To edit such a template, save it as a new version. See [Use Multiple Versions of a Prompt Template](#).

View a Model

The **View this model** link in the Model section of the Template Settings panel opens the Einstein Studio model page for the selected model. On this page, make any changes to the model before continuing to draft your prompt template in Prompt Builder.

! **Important** Users need the Data Cloud Admin permissions to see and use the **View this model** link in the Template Settings panel. Without these permissions, users can't access Model Configuration within Einstein Studio.

Replace a Hidden Model

An LLM configuration can be hidden in Einstein Studio. A prompt template that uses a hidden model continues to run as before. However, it's recommended that you replace the hidden model with an available one. If you open a prompt template that uses an unavailable model, Prompt Builder has you select a different model in the Models field before you can save your changes as a new version.

See Also

[Large Language Model Support](#)

Prompt Builder Limits and Considerations

When designing, managing, and running prompt templates, consider the use limits and considerations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

[Prompt Builder Limits](#)

Learn the numerical limits of prompt templates.

[Prompt Builder Limitations](#)

Learn about the functional limitations of prompt templates that affect certain behaviors and outcomes.

[Change Set Considerations for Prompt Templates](#)

Before you use change sets to deploy a prompt template, understand the limits and behaviors that are related to component dependencies and deployment.

[Salesforce CLI Considerations for Prompt Templates](#)

Understand the limits and behaviors that are related to metadata component dependencies and deployment when using Salesforce CLI with Prompt Templates.

[Deployment Considerations for Prompt Templates](#)

Include a prompt template in managed, unmanaged, or unlocked packages. Before you deploy a package that contains a prompt template, in changesets or on the CLI understand the limitations and behaviors.

[Packaging Considerations for Prompt Templates](#)

Include a prompt template in managed, unmanaged, or unlocked packages. Before you create, update, or deploy a package that contains a prompt template, understand the limitations and behaviors of packages.

Prompt Builder Limits

Learn the numerical limits of prompt templates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Numerical Limits

Prompt templates have these numerical limits.

Numerical Limits

Limit Description	Limit
Maximum template size	128,000 characters
Maximum number of template versions	50
Maximum number of merge fields	50
Maximum number of flow merge fields	5
Maximum number of Apex merge fields	5
Maximum number of related list merge fields	5
Maximum number of inputs in a Flex template	5

File Upload Limits

Most models support at least one file type that can be used with prompt templates.

These file limits apply across all models:

- Maximum quantity: 10 images or 100 PDF pages per request
- Total file size: 15MB per request

! **Important** Some models may have smaller limits than the ones listed here. Check with your model provider for exact details.

Unsupported files are excluded from the request. Due to post-processing, the size of a file may exceed the listed limits. A list of excluded files is displayed in the resolution panel after processing.

See Also

- [Grounding with File Inputs](#)
- [Prompt Builder Limitations](#)

Prompt Builder Limitations

Learn about the functional limitations of prompt templates that affect certain behaviors and outcomes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Audit Trail Isn't Supported

Creating or updating a prompt template isn't tracked in the Setup Audit Trail.

New Custom Objects and Custom Fields Aren't Immediately Available After Creation

When you create a custom object or custom field, it isn't available for use in Prompt Builder immediately. To use a new custom object or field immediately, log out and log back in.

Records Without a Name Don't Display in the Record Selector

Prompt templates with encrypted or missing name fields can't be previewed. Their records are unavailable in the test record selector.

Supported Object Types

Salesforce supports many object or field suffixes to represent different types of data. Prompt Builder supports only these types of objects and fields as resources.

- UI API-supported objects. For a full list, see [All Supported Objects](#).

 **Important** The KnowledgeArticleVersion object is supported only for Flex Template types.

- Standard objects (no suffix)
- Standard fields (no suffix)
- Custom objects (`__c`)
- Custom fields (`__c`)
- Histories (`__history`)
- Related lists (`__r`)

Object Preview Limitations

You can't preview objects with no Name field or objects whose Name field is encrypted.

Limitations for Field Generation Templates

You can't use Field Generation prompt templates for rich text areas in knowledge entities (`__kav`). To populate a knowledge entity's rich text area with a Prompt Builder template, use a Flex prompt template, Flow, or Apex.

Limitations for Flex Templates

You can't import or export metadata from flex templates, including metadata related to flex templates.

For example:

- Apex classes that reference flex templates
- Flows that reference flex templates
- Change sets to move flex-related artifacts between orgs

To delete flex templates that use flows or Apex classes, first remove any flows and Apex resources in all versions of the template. Second, delete any flows and Apex classes that reference the prompt template. Then delete the flex template.

Limitations for Einstein Search

If a prompt uses an Einstein Search retriever, the change sets don't include the retriever or search index metadata. You must manually create the retriever in the destination org before deploying the retriever. This rule applies to change sets and Metadata API deployments.

See Also

[Ground Prompt Templates with Salesforce Resources](#)

[Monitor Setup Changes with Setup Audit Trail](#)

[Prompt Builder Limits](#)

Change Set Considerations for Prompt Templates

Before you use change sets to deploy a prompt template, understand the limits and behaviors that are related to component dependencies and deployment.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Activate and Deactivate

- Activating a prompt template changes the version status from Draft to Published. When a version is published, it can't be changed to a draft.
- Prompt template versions can be activated or deactivated.
- A version doesn't auto-activate during deployment between multiple orgs unless the Deploy Prompt Templates permission is enabled in the target org. This permission is only applicable to changesets and can be found in Setup under Einstein Setup.
- If the prompt template is in use, a version can't be deactivated unless another version is active.

- If a prompt template is in use, the active version can't be deleted.
- If a flow is referenced in a prompt template and deployed, the flow isn't auto-activated. Follow the flow guidelines for auto-activation. If a prompt template is executed with an inactive flow, you receive an error at runtime.

Other Considerations

- Any published prompt template version can't be modified and is skipped when it's deployed.
- If a template is overridden, users aren't allowed to override it again with a changeset, command-line interface (CLI), or Connect API.
- Prompt templates can't be deleted via changeset.
- When you deploy a template with custom large language model (LLM) configuration, verify that the target org has a model with the same name. If the model name doesn't match, the deployment fails.
- When a template is deployed by using a changeset, all versions—active or inactive—are included in the deployment.
- Add all resources in the changeset, and then add dependencies.

See Also

[View and Add Dependent Components to a Change Set](#)

Salesforce CLI Considerations for Prompt Templates

Understand the limits and behaviors that are related to metadata component dependencies and deployment when using Salesforce CLI with Prompt Templates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

What Is Salesforce CLI?

Salesforce CLI is a command-line interface that simplifies development and build automation when working with your Salesforce org. You can use it to synchronize metadata between your org and a local DX project stored in a source repository such as GitHub.

To download Salesforce CLI, click [here](#). See the [Salesforce CLI Setup Guide](#) for detailed documentation.

Use Salesforce CLI with Prompt Templates

Prompt templates are represented in an org with the [GenAiPromptTemplate](#) metadata type. Use standard Salesforce CLI commands to deploy and retrieve specific [GenAiPromptTemplate](#)

components between your DX project and org.

Deploy:

```
sf project deploy start --metadata GenAiPromptTemplate:TemplateName --target-org myorg@username.com
```

Retrieve:

```
sf project retrieve start --metadata GenAiPromptTemplate:TemplateName --target-org myorg@username.com
```

Replace `TemplateName` with the name of your prompt template, and `myorg@username.com` with the unique username or alias of your org.

For more information about the `project` commands, and other CLI commands you can use, see [Salesforce CLI Command Reference](#).

Activate and Deactivate Prompt Templates

- You can use `<versionIdentifier>` in `<activeVersionIdentifier>` to activate a template, or you can activate a template in the UI and retrieve it for correct XML.
- If a template is in use, block deactivation of a version unless another version is activated.
- If a prompt template version is published and not in use, any version can be activated or deactivated.
- If a template isn't in use, version deactivation is allowed without needing to activate another version.

Create New Prompt Templates

- After adding a new template, get the template because `<versionIdentifier>` is generated automatically after the version is created.
- When you have a template with `<versionIdentifier>` and `<activeVersionIdentifier>`, you can deploy that to another org. The `versionIdentifier` ensures that there's no need for you to deploy or retrieve it for all orgs in CI/CD pipelines.

Delete Prompt Templates

- Prompt templates can't be deleted via CLI.
- Prompt template versions can be deleted with the CLI. When deleted, it's removed from the version in XML.
- A template version can be deleted from the XML and deployed via CLI. The deleted version is deleted in the target org unless that version is active and in use.
- If a template is used with an active version, it can't be deleted.

Deploy Prompt Templates

- You must have at least 1 template version to deploy the template.

Modify Prompt Templates

- If a prompt template version is published and not in use, it can't be modified.
- Any published version can't be modified. The deploy will succeed, and published versions are skipped.
- If you manually set `<versionIdentifier>` and have duplicated it, the new and old versions will overwrite each other, if those versions are in draft status. Otherwise, the first published version stays and the second one is skipped, as published versions are immutable.

Other Considerations

- If a template has been overridden, users aren't allowed to override it again with a changeset, CLI, or Connect API.

Deployment Considerations for Prompt Templates

Include a prompt template in managed, unmanaged, or unlocked packages. Before you deploy a package that contains a prompt template, in changesets or on the CLI understand the limitations and behaviors.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Deploy Packages

- Use Manual Inputs when creating Template-triggered Flows. Deploy the prompt and the flow together in a single deployment.
- Flows with Automatic Inputs will cause a deployment to fail if a template references them.
- If a deployment fails, deploy the flow first, and then deploy the template separately.
- To deploy a package using the CLI, you must have at least one template version to deploy the template.

Packaging Considerations for Prompt Templates

Include a prompt template in managed, unmanaged, or unlocked packages. Before you create, update,

or deploy a package that contains a prompt template, understand the limitations and behaviors of packages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Create Packages

- Prompt templates that include a flow with a custom object input may cause package installation to fail, as packaging for prompt flows with custom objects is not yet supported.
- Include only published versions. Draft versions can be added to the package, but they aren't installed in customer orgs for managed packages.
- Any future changes to a published version are skipped during upgrade without error.
- If a published version is active and it's different from the current version, it's auto-activated in the customer's organization.
- If no versions are published, don't package the template. If you package a template without a published version, any installation or upgrade fails because of an empty template.
- Prompt templates with custom models can't be packaged.
- If you include an Apex class in a prompt template and package it, the class must be global.
- For unmanaged, unlocked, or managed packages, skip packaging if a template overrides any out-of-the-box (OOTB) template. Overridable templates aren't packageable right now.
- Retrievers like Data Search and Data Graphs aren't included in packages. Instead, they're part of a data kit in Data 360. Salesforce Independent Software Vendors (ISVs) are encouraged to provide retrievers to the customer, or the installation fails because of missing metadata.
- New versions can be added to an existing template, but old versions can't be modified or deleted.
- New versions can be activated, and old versions can be deactivated.
- Customers can't change packaged templates, but they can be cloned into new templates if customers want to modify them.
- A template with no active version can be delivered, but customers aren't able to use it because the template isn't active. Customers can clone the template to create their own custom template and modify it for their own use cases.
- ManagePromptTemplates permission must be assigned while creating second-generation (2GP) package versions. This snippet can be used in `sfdx-project.json` to specify the permission to assign to the build user while creating the org and building the package.

```
{  
  "packageDirectories": [  
    {"versionName": "ver 0.2",  
     "versionNumber": "0.2.0.NEXT",  
     "path": "force-app",  
     "default": true,  
     "label": "Production"  
   ]  
}
```

```
    "package": "Prompt Template 2GP Pkg",
    "versionDescription": "",
    "definitionFile": "config/project-scratch-def.json",
    "packageMetadataAccess": {
        "permissionSets": [
            "EinsteinGPTPromptTemplateManager"
        ]
    }
},
"name": "managed",
"namespace": "NAMESPACE",
"sfdcLoginUrl": "https://login.salesforce.com",
"sourceApiVersion": "63.0"
}
```

Install and Upgrade Installed Prompt Templates

- In Einstein Setup, if Add or Require Inputs After Activation isn't enabled and you change inputs between template versions, the package installation fails with the error: 'This app can't be upgraded.'
- Before installing or upgrading a package in production, test installation or upgrade in sandbox and test.
- Customers can't deactivate a version after installation or upgrade.
- You can't overwrite a published prompt template version.
- If the prompt template model is hidden, the existing template works as intended. However, if the template is cloned, the model won't be available for use.
- For active versions, auto-activate them in the customer organization. Always test changes in sandboxes before installing or upgrading a package.
- Einstein Generative AI must be activated for installation of packages with Prompt templates otherwise installation fails.
- Flows aren't auto-activated when a package is installed. Flows follow the standard activation process for managed packages that's established.
- Partners can deactivate a template. However, if that template is in use for the customer, the upgrade fails. To upgrade the package, customers must remove that template from use.
- If you package a template with a custom LLM model configuration, verify your customer org has a model with the same name, otherwise installation or upgrade fails.
- Custom fields on Dynamic Forms-enabled Lightning pages can reference prompt templates. If you install a managed package containing a prompt template that is referenced by a custom field on a Dynamic Forms-enabled Lightning page, and that prompt template references a custom field with a namespace that is different from the Lightning page's namespace, package installation can fail.

Delete Installed Prompt Templates

- Versions can't be deleted from a managed template.

- A managed template can be deleted from a 2GP package, but it isn't deleted on the customer's org. Customers see the deprecated templates and have the option to delete them.

See Also

[Data Kits](#)

[Automate Tasks with Flows](#)

Create a Prompt Template

Select the type of prompt template to create based on your use case. Based on the template type, define the resources available for the template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

To create a prompt template:

1. To open Prompt Builder from Setup, in the Quick Find box, enter *Prompt Builder*, and then select **Prompt Builder**.
2. Click **New Prompt Template**.
3. Select a Prompt Template Type to match your use case. For more information, see [Prompt Template Types](#).
4. Enter a Prompt Template Name.
5. Optionally, enter a Template Description. This description is displayed in the list of prompt templates and can be useful to distinguish prompt templates as you add more.
6. The remaining fields on the page differ depending on the prompt template type that you selected.
7. Click **Next**, and you're redirected to the Prompt Template Workspace. The Prompt Template Workspace is where you add the details for your prompt template. You can write a template from scratch or copy and paste an example template as a starting point.

See Also

[Create a Sales Email Prompt Template](#)

[Create a Field Generation Prompt Template](#)

[Create a Flex Prompt Template](#)

Prompt Template Types

Learn about the prompt template types available in Prompt Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Prompt Template Type	What it Creates
Campaign Brief	<p>Content for a campaign brief including name, key message, audience description, and detailed campaign goals.</p> <p>See Agent Action: Draft a Campaign Brief</p>
Case Summary	<p>Summary of a Case object including a Summary, Issue, and Resolution.</p> <p>See Customize the Work Summaries for Case Prompt Template.</p>
Contextual Service Replies	<p>Customize your context based Service Replies prompt templates for Live Chat and Messaging Sessions.</p> <p>See Customize the Context Based Service Replies Prompt Templates.</p>
Contract Analysis	<p>Retrieves key information from contract documents to answer user questions or generate summaries of important clauses and sections.</p> <p>See Customize Prompt Templates for Contract Search.</p>
Common Services AI	<p>Content for any business purposes that requires context of current user object and its related fields. Used for enabling Einstein Summary component on the home page. For example, in Salesforce, users can create a prompt that summarises top leads and execute it through Einstein Summary directly at the homepage. This prompt template requires the EinsteinForSvcInovtAddOn add-on.</p> <p>See Add Einstein Summary to a page.</p>
Course Offering Slack Canvas	The Slack canvas layout for a course offering record.

Prompt Template Type	What it Creates
Extract Product Mentions	<p>Identifies and retrieves product-related details from unstructured conversations such as emails, slack messages, or call transcripts. This prompt template requires Revenue Cloud and Einstein or Agentforce for Sales add-on or the Einstein 1 Sales add-on.</p> <p>See Configure Extract Product Mentions Template.</p>
Field Generation	<p>Content for record fields in Lightning Experience. In Salesforce, users click a button to run this prompt and populate the field with output.</p> <p>See Create a Field Generation Prompt Template and Field Generation Prompt Templates in Action.</p>
Flex	<p>Content for any business purposes that other templates don't cover. Flex prompt templates let you define your own resources.</p> <p>See Create a Flex Prompt Template and Flex Prompt Templates in Action.</p>
Grounded Service Replies	<p>Customize your grounded Service Replies prompt templates for Live Chat and Messaging Sessions.</p> <p>See Customize the Grounded Service Replies Prompt Templates.</p>
Generate case description	<p>Content for the case description, including key details discussed during the interaction to help support teams understand and resolve the issue.</p> <p>See Agent Action: Create Case with Enhanced Data.</p>
Generate case subject	Content for the case subject line that summarizes the reported issue.
Intent Retrieval	Content including the user's relevant conversation history and available filter options, to help the agent understand the user's intent.
Journey Decisioning Content	Content for the journey messages that are stored in a data extension for use in Journey Builder in Marketing Cloud Engagement.
Journey Decisioning Selection	Content is the subscribers that are sorted into their optimal journeys stored in a data extension for use in Journey Builder in Marketing Cloud Engagement.
Knowledge Answers	<p>Customize how Agentforce agents answer questions.</p> <p>See Create a Knowledge Answers Prompt Template and Agentforce Platform Answer Questions with Knowledge.</p>

Prompt Template Type	What it Creates
Research Profile Slack Canvas	The Slack canvas layout for a party philanthropic research profile record.
Sales Emails	<p>Personalized customer email based on record data.</p> <p>See Create a Sales Email Prompt Template and Draft a Sales Email with Einstein Generative AI.</p>
Sales Pitch Coaching	Feedback for sales reps based on their transcript from a sales pitch or role play session.
Search Learning Courses	A list of recommendations based on record data in response to the user's query.
Security Risk Analysis	<p>Next steps to remediate risks for instances where risks or threats are detected with Salesforce security posture data.</p> <p>See Agent Action: Classify Security Risk.</p>
Record Prioritization	<p>Prioritized records based on user input or available data. Using agents, the record prioritization prompt templates are used by the Prioritize Opportunities standard agent action.</p> <p>See Sales Prioritize Opportunities</p>
Record Research	Summarized research results based on delivered prompt templates or user input. In Salesforce, users click a button on the Account Research component to run this prompt and generate the output. Record research prompt templates use the Einstein Search Web Retriever to perform research.
Record Summary	<p>Summarized record data for a comprehensive view of a record. Record summary prompt templates are used by the Summarize Record standard invocable action. Agents use the Summarize Record standard agent action.</p> <p>See Agentforce Platform Summarize Record</p>
Work Summary	<p>Drafts a Summary, Issue, and Resolution in the Wrap Up component at the end of a Voice Call or Messaging Session.</p> <p>See Customize the Summarize Messaging Session Prompt Template and Customize the Summarize Voice Call Prompt Template.</p>

See Also

Prompt Builder Limits

Ingredients of a Prompt Template

When you start to build your own prompt templates, it can feel intimidating. Like all new skills, designing great prompts requires some experimentation and practice. To guide your prompt design, it's helpful to start with the key components of every effective prompt template. Like a good recipe, these "ingredients" work together to help large language models (LLMs) generate accurate and consistent responses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

All prompts are different. You don't need every ingredient in every prompt template.

Participants

Describe who's sending and receiving the model's response. You can use merge fields that reference record fields, flows, Apex and more when you describe the participants.



Example

```
You're a <sender.JobTitle_Merge_Field> and your  
name is <sender.Name_Merge_Field> and you're from an  
organization called <sender.Company_Merge_Field>. Your  
prospect is <recipient.Name_Merge_Field> from the company  
<recipient.Company_Merge_Field>.
```

Setting

Give the model contextual information, such as the communication channel or type of content that the response is for. Your prompt template type determines your setting. For example, if you choose the Field Generation template type, your setting is a record field.

Goal

Describe what you hope to achieve with the model's response. Make sure that you consider your users' context, preferences, and past behavior. You can add details to your goals by using merge fields.

 **Example**

Encourage your contact to attend the <event.Subject_Merge_Field> event in <event.Location_Merge_Field>.

Relationships

Describe the relationship between the participants involved. Also mention how the model's response relates to the participants.

 **Example**

You are a customer service agent interacting with a customer over chat for the first time.

Data

Give the model relevant CRM data to work with using merge fields.

Instructions

Tell the LLM what type of content you want and what it must include. Surround instructions in triple quote boundaries, which helps the LLM to distinguish between prompt context and instructions.

 **Example**

Instructions:

"""

Generate an introduction email to your prospect. Indirectly encourage the prospect to respond to your email by showing that you are willing to answer any questions they may have.

"""

Guidelines

To reduce the possibility of hallucinations, give the model guidelines that it must follow.

 **Example**

When I ask you to generate an introduction email, you must strictly follow

my instructions below.

Language

Tell the model which language to generate the response in. For a list of supported languages, see [Supported Languages in Prompt Template Responses](#).

Style and Tone

Give the model style and tone guidelines to follow.



Example

Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.

Questions for Effective Prompts

To contextualize these ingredients, use these questions to identify the details that your prompt template requires to be effective.

- What's the goal of the prompt template?—By declaring the goal of the response first, you can better answer all the subsequent questions.
- Who is involved?—Describe the participants who send or receive the response, the relationship between the participants, and the relationship between the participants and the response.
- What's the context of the prompt template and the response?—Define a setting for the model response, the CRM data to ground the prompt in, and add a command that tells the model what to generate.
- What guardrails does this prompt template need to succeed?—You can add more information, such as instructions for the response's style and tone.

An effective prompt template answers these questions so that the LLM can generate a personalized response every time. A great prompt template is also scalable so that you can reuse it across different use cases. With Prompt Builder, it's easy to design prompt templates that achieve these goals.

See Also

[Ground Prompt Templates with Salesforce Resources](#)

[Best Practices for Building Prompt Templates](#)

Ground Prompt Templates with Salesforce Resources

With Prompt Builder, you can dynamically ground prompt templates with CRM data using merge fields.

REQUIRED EDITIONS

Grounding provides the LLM with the context to create personalized responses based on your accurate and up-to-date information. Sensitive data, such as personally identifiable information, stays in Salesforce and isn't shared with the LLM. To see the placeholders for this data, look at the prompt template preview.

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

The zero-retention agreement in the Einstein Trust Layer ensures that anything shared with the LLM isn't stored or used for training. For more information, see [The Einstein Trust Layer Trailhead module](#).

When you create a prompt template in Prompt Builder, you first choose an object, such as an account or contact, to associate with your template. For a field generation template, you also select the field that you want Einstein to help users complete.

As you write your prompt template in the Prompt Template Workspace, you can use the **Insert Resource** button to add merge fields that reference record fields, flows, Apex, Data 360 DMOs, and related lists. When you create a prompt template, it works with Apex or flows whose required inputs are a subset of the prompt template inputs. For flows, all inputs are considered required and must be present in the prompt template. For Apex, inputs are optional unless annotated as required. Optional Apex inputs don't have to be present in the prompt template. Apex and flows with no parameters work with all prompt templates.

See Also

[Prompt Builder Limits](#)

[Prompt Builder Limitations](#)

Configure an Action in a Prompt Template

Modify existing actions in Prompt Builder like Flows, Apex or, Retrievers and add them directly to your prompt.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
 - Execute Prompt Templates
-

To configure a new action:

1. In the Prompt Builder canvas, type @ and select **Configure Action**, or in **Template Settings**, go to the **Resources** tab and select the plus sign in the Actions section to configure a new action.
2. Select the action type you want to configure.
3. Select the specific action you want to configure to view the action's metadata.
In the resource picker, retrievers don't show up automatically. To find an available retriever, click **Configure Search +**, then select and configure it.
4. In the Descriptors section, update the action's label or description as needed.
5. In the Inputs section, provide or update the inputs related to the action.
6. If any changes were made, click **Apply and Insert** to update the action with the new or updated input(s).

Add a New Action to a Prompt Template

Add a new action such as Flow, Apex, or Retriever to a prompt template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
 - Execute Prompt Templates
-

To add a new action to a prompt template:

1. In the Prompt Builder canvas, select one of the following options: type @, click **Insert Resource**, or in **Template Settings**, select **Resources**.
2. Select the action type.
3. Select the specific action.

Ground with Record Merge Fields

Record merge fields connect your prompt templates to Salesforce object fields. The prompt template type and the objects that you associated with your prompt template determine which merge fields are available.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Sales email prompt templates can have merge fields corresponding to these objects.

- Recipient (the contact or lead)
- Sender (the user)
- Current Organization (the Sender's Organization)

Field generation prompt templates can have merge fields corresponding to these objects.

- Current User
- Current Organization (the user's Organization)
- The object that you associated with the prompt template

Flex prompt templates can have merge fields corresponding to these objects.

- Current User
- Current Organization (the user's Organization)
- The objects that you associated with the prompt template

When you select a standard or custom object field in the Prompt Template Workspace, the field is added to your template as `Input:RecordName.FieldName`. During prompt resolution, real CRM values populate the merge fields based on the specific records that your user selects.

For example, you have a prompt template that includes this sentence:

You are a support representative and you need to create a short summary of all open cases for the [Account Name] account.

You select the Astro's Bakery account record in Prompt Builder to associate it with your template, and then you run your template.

You are a support representative and you need to create a short summary of all open cases for the {!\$Input:Account.Name} account.

Prompt Builder replaces the `Input:Account.Name` merge field with the account name “Astro’s Bakery.” The resolved response could look like this.

You are a support representative and you need to create a short summary of all open cases for the Astro’s Bakery account.

To use record merge fields in Prompt Builder, see:

- [Add Record Merge Fields to a Sales Email Prompt Template](#)
- [Add Record Merge Fields to a Field Generation Prompt Template](#)

Ground with Flow Merge Fields

Flows elevate your prompt templates beyond grounding with record fields. Use Flow Builder to add complex logic to a prompt template. With flows, you can also access unified Data 360 objects. By referencing Data 360 data, you can use real-time information that was consolidated across multiple data sources.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

If you’re new to flows or Data 360, check out the [Flow Builder Basics](#) and [Salesforce Data 360: Quick Look](#) Trailhead modules. To learn about data consolidation with Data 360, see [Salesforce Help: Unify Source Profiles](#).

You can create a flow for use with a prompt template by selecting **Template-Triggered Prompt Flow** in Flow Builder. A prompt template flow launches from a prompt template, and then it adds prompt instructions to the associated prompt template. Other flow types aren’t available to prompt templates.

To reference Data 360 data, use the Get Records element. In the Get Records element, select **Data Cloud Object** as your data source. Next, select the relevant data space or object, and specify filters to narrow your data. After that, use Data 360 record data as you do with any record variable in the flow.

Then, use Create Prompt Instructions elements to write the prompt instructions that the flow returns to the associated prompt template. These prompt instructions can include merge fields for CRM and Data 360 data based on the outcome of a Decision element. Each merge field returns a value as a string of text in the prompt instructions. For example, an `Input.Contact.MailingCity` merge field in the Create Prompt Instructions element returns “San Francisco” in the prompt instructions.

You can add a prompt template flow to your prompt template as a merge field with the format `Flow:FlowName`. The flow runs each time a user uses the associated prompt template. Within the flow, each Create Prompt Instructions element adds prompt instructions. When the flow completes, all the

prompt instructions are sent to the prompt template and populate the merge field as a string of text.

To use flows in Prompt Builder, see:

- [Add Flow Merge Fields Without Data 360 Objects to a Sales Email Prompt Template](#)
- [Add Flow Merge Fields Without Data Cloud Objects to a Field Generation Prompt Template](#)

To use flows with Data 360 objects in Prompt Builder, see:

- [Add Flow Merge Fields with Data 360 Objects to a Sales Email Prompt Template](#)
- [Add Flow Merge Fields with Data 360 Objects to a Field Generation Prompt Template](#)

Because you can now use flows across different template types, including Flex templates, the Flex capability is no longer needed and will be retired in Spring '25. It's a good idea to migrate any flows that use the `Flex: *` type. Change the start node type to use manual inputs, then add each of the variables as inputs. Save the flow, then verify that your prompt template continues to work as expected with the flow merge fields.

-  **Note** If you change the inputs for a flow or Apex class that's used as a resource in a prompt template, the prompt template no longer works and you can't save new versions of the prompt template. See this [known issue](#).

Migrate a Flow to Not Use the Flex Capability Type

Update a flow so that it doesn't use the deprecated `Flex: *` capability type by replacing the input variables with new values.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

1. Find every place in the flow that uses an input, and write down all input variables that the flow uses.
2. Edit the Start element, and select **Manual Inputs** for the input type.
3. Add all the input variables that you wrote down.
4. For each input in the flow, replace `{!input.<input_variable>.<field>}` with `{!<input_variable>.<field>}`.
5. Save the flow as a new version and activate it.
6. Update your prompt templates to use the new version of the flow, and make sure that they work as expected
7. Delete the old version of the flow.

Grounding with Apex Merge Fields

You can use an Apex merge field in a prompt template to return data from a SOQL query or an external API. Apex is also effective if you want to generate well-formatted JSON or do programmatic data filtering.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

To use Apex in Prompt Builder, you must create an Apex class that contains at least 1 method annotated with `InvocableMethod`. For details, see the [Apex Developer Guide](#).

If desired, the `InvocableMethod` annotation can specify a `CapabilityType` that matches the prompt template type.

Example annotation:

```
@InvocableMethod(CapabilityType='PromptTemplateType://einstein_gpt__salesEmail').
```

This table lists the `CapabilityType` for each prompt template type.

 **Note** Don't specify a `CapabilityType` for the prompt template type `einstein_gpt__caseEmailDraft`, used for Service Email Assistant. This prompt template type uses Case as an input API name, so you should use another API name for the input, like `CaseObject`.

Prompt Template Type	CapabilityType
Sales Email	<code>PromptTemplateType://einstein_gpt__salesEmail</code>
Field Generation	<code>PromptTemplateType://einstein_gpt__fieldCompletion</code>
Record Prioritization	<code>PromptTemplateType://einstein_gpt__recordPrioritization</code>
Record Summary	<code>PromptTemplateType://einstein_gpt__recordSummary</code>

The Flex capability has been retired, so it should no longer be used in Apex classes. We recommend refactoring any Apex code that uses `CapabilityType=FlexTemplate:///*` so that it doesn't use FlexTemplate. Remove the `CapabilityType` attribute and save, and then verify that your prompt template continues to work as expected with the Apex merge fields.

Method Input

The method's input parameter must have a `List<Request>` type. The `Request` class defines an

`InvocableVariable` member for each input defined by the prompt template type. All inputs are passed from the prompt template into the invocable method. Only the first element in the list has data.

When present, the `CapabilityType` for a prompt template type acts as an interface for the `Request` input class. Each `CapabilityType` requires that the `Request` class defines specific `InvocableVariable` members. For example, the field generation `CapabilityType` requires that you define a `RelatedEntity` member variable in `Request`. If there are additional objects defined in the prompt template, an associated `InvocableVariable` member must be defined by using the exact spelling and case sensitivity. In this example, the prompt template defined `Account` as the object that the template is updating.

```
public class Request {  
    @InvocableVariable  
    public Account RelatedEntity;  
}
```

 **Note** If you change the inputs for a flow or Apex class that's used as a resource in a prompt template, the prompt template no longer works and you can't save new versions of the prompt template. See this [known issue](#).

Method Output

The method output has a `List<Response>` type containing a single string member named `Prompt` that's annotated with `InvocableVariable`. For details, see the [Apex Developer Guide](#).

Add Apex Resource to a Prompt Template

In the Prompt Template Workspace, add an Apex class to a prompt template by clicking the **Resource** field in the Prompt section and selecting **Apex**.

 **Note** If you open the Developer Console before you preview a prompt template that uses Apex, you can see debug statements in the Developer Console. For more information, see [Working with Logs in the Developer Console](#) and `debug(msg)` in the Apex Developer Guide.

To use Apex in Prompt Builder, see:

- [Add Apex Merge Fields to a Sales Email Prompt Template](#)
- [Add Apex Merge Fields to a Field Generation Prompt Template](#)
- [Add Apex Merge Fields to a Flex Prompt Template](#)

Grounding with Data Graphs

Unify multiple data sources into a centralized dataset to access a 360-degree view of customer data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

To create and manage retrievers:

Data Cloud permission set

To run prompts with Einstein Search:

Data Cloud User permission set

To access Einstein Studio models in Prompt Builder:

Einstein Studio permission set

If you're new to Data 360, check out the Trailhead trail, [Get Hands on with Data 360](#). To learn about data consolidation with Data 360, see [Unify Source Profiles](#).

Create a data model object (DMO) that pulls data from multiple sources, including Salesforce objects and third-party entities like Amazon Web Services. This data consolidation enables a comprehensive dataset within your data graph. Next, Identity Resolutions unify matching data across all the sources, providing a complete view.

 **Note** Data Graphs are supported on DMOs that are associated with CRM data streams for Salesforce sObjects and custom objects.

To reference an active data graph in Prompt Builder, create a prompt template. In the Prompt section, click **Insert Resources** or select a data graph from the Resources field, organized by object type. When you select the data graph, it's added to the prompt template in the format:

`DataGraph:InputName:DataGraphName`. You can then preview the data in JSON format during prompt testing. Sensitive data is masked before sending it to the LLM.

Users see data graphs they have permission to access within a data space. If a referenced data graph is deleted, users receive an alert showing the prompt templates that are referencing it.

To use data graphs in Prompt Builder, see [Add Data Graphs to a Sales Email Prompt Template](#).

Considerations and Limitations

Consider these points when grounding your prompts with Data Graphs.

- Only data graphs associated with the object inputs within the prompt template are supported.
- Data graphs on DMO template inputs or lookup fields aren't supported.
- To move prompts between organizations using change sets, verify the referenced data graphs are present in the target organization before deployment.
- Prompt Builder only supports whole data graphs and doesn't support subgraphs within a larger data graph.
- The DMO associated with the Object Input must be either the root of the data graph or connected to a Unified Profile DMO at the root of the graph.

Ground with Data 360 DMO Merge Fields

Ground your prompt templates with data model objects (DMOs) from Data 360 in Prompt Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

To create and manage retrievers:

Data Cloud permission set

To run prompts with Einstein Search:

Data Cloud User permission set

To access Einstein Studio models in Prompt
Builder:

Einstein Studio permission set

Data model objects are harmonized groupings of data created from data streams, insights, and other sources. DMOs are the products of organizing and mapping your data in Data 360 and are a critical part of creating connections across all your data.

It only takes two steps to enable Prompt Builder to use your DMO data for grounding in prompt templates. First, use [Data 360 enrichments](#) to create relationships between your DMOs in Data 360 and Salesforce objects. Data 360 enrichments support enriching the Contact and Lead objects in Salesforce. Data 360 supports two types of data relationships between DMOs and Salesforce objects—copy fields and related lists of DMOs on Salesforce objects. You can use data of a supported relationship type relevant to Contact and Lead within Data 360 DMOs for grounding in Prompt Builder.

Then, after the data enrichment is complete, the newly created relationships with DMOs appear as native

data within Salesforce CRM and are available for grounding in Prompt Builder just like any other native Salesforce data. You can find your DMO under the **Actions** section of the **Insert Resources** dropdown menu.

See Also

- [Enrich Your Org with 360 Data And Insights](#)
- [Work with Data Model Objects](#)
- [*Trailhead: Customer 360 Data Model for Data 360*](#)

Grounding with File Inputs

With file inputs, you can ground your prompt templates with richer context to achieve more accurate and relevant responses. Incorporate images and PDF files into your prompt template. Image and PDF inputs are useful for scenarios where your prompt must process and analyze visual information.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

These file types are supported.

- .pdf
- .png
- .jpeg

Note

- Not all models support file inputs. Before adding images or PDF files, review your model's file size and quantity requirements. Unsupported files are excluded from the request. The excluded files are listed in the resolution panel after processing. To learn more, see [Prompt Builder Limits](#).
- During prompt template execution, a JPEG, PNG, or PDF file is uploaded as a binary file in the prompt request. Einstein Trust layer protections are not applied to the contents of the uploaded binary file. To apply Einstein Trust layer protections for a PDF file, in the prompt template, first extract the applicable content of the PDF (in text format) into the prompt, and then send the prompt to the Large Language Model.

After an image or PDF is selected, the file and its metadata are associated with the prompt template. Metadata here refers to the metadata of the file record, as all used files are uploaded into your org as contentDocuments and, in turn, have their own record page. If the metadata of an image is needed in the prompt template, you can select it by clicking the Resources field in the Prompt section and use it as a merge field.

To use file inputs in Prompt Builder, see:

- [Add a Related List with File Inputs to a Flex Prompt Template](#)
- [Add File Inputs to a Flex Prompt Template](#)

Grounding with Related List Merge Fields

Ground your prompt templates with your object's related lists to add depth and context to your grounding.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

 **Note** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

With related list support in Prompt Builder you can add related list merge fields in your prompt templates for rich grounding. When you ground a prompt template with a related list, the fields for the related list are based on the page layout of the parent object for the current user. Record-level filters aren't applied. The retrieved data is rendered in JSON format and shown in the resolution.

Considerations, Guidelines, and Limitations

Consider these points when grounding your prompt templates with related lists in Prompt Builder.

- Activities related lists on objects such as Account and Case aren't supported.
- If you configure a related list in a prompt template and a user doesn't have the related list on their parent object's page layout or Read permission on the associated object, no related list data is sent to the LLM.
- Only related lists available on the object's page layout are available for grounding in Prompt Builder. If an object has custom record types, only related lists on the master record type's layout are available. If no default record type exists for the context user, the Salesforce default record type is used instead.
- When entering an expression rather than selecting a resource in the Resource field, an object is shown as `!$RelatedList:Account.Contacts.Records`. After you enter this expression, Prompt Builder simplifies the UI presentation, leaving only `Related List: Account.Contacts`.
- In situations where a related list yields zero results, the prompt response still responds successfully but without adding any related list content to the response.
- The User and Organization related lists aren't supported due to a limitation involving global variables.

Grounding Prompts with Record Snapshots

Ground your prompt templates with Record Snapshots for a more convenient and powerful prompt authoring experience.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

For the most part, grounding your prompts with different types of Salesforce data has the same basic process. Start by crafting a prompt that incorporates Salesforce data. Then populate your prompt with grounding resources from the resources field in the Preview section. And then Prompt Builder resolves the grounding resources with real data when generating the response.

Record Snapshots brings a new way to ground your prompts, by automatically including data available on the user's page layout for an object with one resource. Instead of individually selecting multiple fields and related lists for an object, you can include relevant data for grounding with one click.

The data that Record Snapshots uses to ground your prompt depends on the page layout of the user. Page layouts are configurable, and the configuration impacts which data is used by Record Snapshots. In other words, when a prompt runs with Record Snapshots, the data used in the snapshot resolution reflects the data visible to that user. You can still select individual fields and resources in addition to Record Snapshot for an object.

-  **Note** The account record snapshot output includes additional grounding data, such as key account fields, products, top opportunities, statistics on open cases, and past activities. The additional grounding data is always included independent of the page layout when it's available.

Considerations and Limitations

Consider these points when grounding your prompts with Record Snapshots.

- Dynamic Forms aren't used in Record Snapshots. However, if Dynamic Forms are activated for an object used by Record Snapshots, the underlying page layout is still used.
- Prompt Builder restricts the quantity of data received from each source to avoid overflowing the prompt token limits.
- "Empty" data (fields without values, sections without limits, and so on) are filtered out.
- Prompt Builder imposes these limitations on each data source used with Record Snapshots.

Data Source	Limit	Criteria
Page layout	None for the number of fields returned.	

Data Source	Limit	Criteria
Compact page layout	None for the number of fields returned.	
Related Lists	The first 6 related lists from the page layout are used, and up to 5 records are used per related list.	
Tasks	The next 5 upcoming tasks are used.	Tasks are selected based on ActivityDate (ascending order), Priority (descending order), and ModifiedDate (descending order).
Events	The next 5 upcoming events are used.	Events are selected based on start date (ascending order).
Emails	The 5 most recent emails are used.	

See Also

[Review, Revise, and Repeat: Ensure That a Prompt Template Is Effective](#)

[Assign Page Layouts to Profiles or Record Types](#)

[Page Layout Considerations](#)

Ground with Knowledge Using Retrieval Augmented Generation

Retrieval augmented generation (RAG) in Data 360 improves the quality, accuracy, and relevance of your LLM-generated responses. Enhance your prompt templates using retrievers with Einstein Search. Add relevant knowledge from unstructured text sources into your LLM prompts. Retrieve knowledge from articles, emails, chat transcripts, and other sources.

Note

- Einstein Search has recently been renamed to Retriever. In the Prompt Template Workspace, type @ or click **Insert Resource** and click **Retrievers**.
- In the resource picker, retrievers don't show up automatically. To find an available retriever, click **Configure Retriever +**, select and configure it, then apply changes and insert it.

[About Retriever in Prompt Templates](#)

Use retrievers in prompt templates to search for and return relevant information from knowledge that's indexed in Data 360. Retriever augment prompt templates by providing relevant, specialized grounding information for prompts. Retriever are created in Einstein Studio.

[Add an Individual Retriever to a Prompt Template](#)

Use individual retrievers in prompt templates to ground your LLM prompts with relevant knowledge. Individual retrievers include retrievers created in Einstein Studio and legacy default retrievers created previously in Data 360.

Add an Ensemble Retriever to a Prompt Template

Use ensemble retrievers in prompt templates to ground your LLM prompts with relevant knowledge. An ensemble retriever is a collection of individual retrievers. When you run an ensemble retriever, it executes the individual retrievers, combines their search results into a single list, reranks the list according to relevance to the search request, and returns just the most relevant information to the prompt or agent. Ensemble retrievers conduct searches from multiple sources in parallel.

Add a Web Retriever to a Prompt Template

Use web retrievers in prompt templates to ground your LLM prompts with relevant knowledge from web sites. Web retrievers are created when a data library that uses web search is created in Agentforce Data Library.

Customize Retriever Output with Prefilters

Get more relevant search results using prefilters in your prompt templates. Prefilters define the conditions that limit the scope of a retriever's search so that only the most relevant information is returned. For example, you can use prefilters to retrieve content associated with only a particular country or product. The filter value, such as the country code or product Id, is specified in the prompt template at run time.

Add Citations to Prompt Template Responses

Add citations to your prompt templates so that your users can compare and verify the generated information with the source information. Sources include content used by agent actions, knowledge articles, and web pages.

See Also

[Add a Retriever to a Field Generation Prompt Template](#)

[Trailhead: Retrieval Augmented Generation: Quick Look](#)

About Retriever in Prompt Templates

Use retrievers in prompt templates to search for and return relevant information from knowledge that's indexed in Data 360. Retrievers augment prompt templates by providing relevant, specialized grounding information for prompts. Retrievers are created in Einstein Studio.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Retrievers as Resources

In Prompt Builder, you can add a retriever as a resource to a prompt template. You can select from these types of retrievers:

- Individual retrievers created in Einstein Studio
- Ensemble retrievers created in Einstein Studio

- Web retrievers created in Agentforce Data Library

 **Note** Default individual retrievers, created previously when a search index was created in Data 360, are supported in prompt templates but new default individual retrievers are no longer created.

Retriever Settings

After adding an active retriever to a prompt template, you can use the Template Settings side panel to fine-tune retriever settings, such as:

- **Search Text:** A fully dynamic field that uses merge fields from your prompt template inputs or free text to search the indexed data. The search text input to the retriever is limited to 255 characters, globals, and prompt inputs. To insert merge fields, use the resource picker above the search text area.
- **Output Fields:** The returned fields in the retriever that contain the search results. By default, all fields defined in the retriever configuration are added to the LLM prompt. However, you can select just the fields you want from the available output fields of the retriever.
- **Number of Results:** The maximum number of retrieved results, such as 15 knowledge article chunks or 10 similar case chunks.

If no value is specified for the list of output fields or the number of results, Prompt Builder uses the values set when the Einstein Search Retriever was created. Access to retrievers and their data is controlled by the [Data Cloud permission sets](#).

Data Returned From the Retriever

Data returned from the retriever is shown in the Prompt Builder Preview Resolution in JSON format. The prompt template response is then customized based on the search criteria.

Considerations

The search text field for retrievers is limited to globals and prompt inputs. It can't use other sources, such as related list, Flow, or Apex.

Add an Individual Retriever to a Prompt Template

Use individual retrievers in prompt templates to ground your LLM prompts with relevant knowledge. Individual retrievers include retrievers created in Einstein Studio and legacy default retrievers created previously in Data 360.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or

Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

To create and manage retrievers:

Data Cloud permission set

To run prompts with Einstein Search:

Data Cloud User permission set

 **Note** These instructions assume that the individual retriever has been created and configured in Einstein Studio. To learn more, see [Create an Individual Retriever](#).

1. In Prompt Builder, create or edit a prompt template.
2. In the Prompt Template Workspace, click where you want to insert the individual retriever.
3. Type @ or click **Insert Resource**, click **Retrievers**, and click **Configure Retrievers +**.
4. Select the individual retriever you want to add to the prompt template.
5. Optionally, change retriever settings in the Template Settings side panel.
 - a. **Descriptors**: Change the **Label** and **Description** for this retriever in your prompt template.
 - b. **Search Text**: Focus your search by specifying additional criteria. Select a resource or specify search text.
 - c. **Output Fields**: If available for the selected retriever, select one or more returned fields of data to ground your prompt.
 - d. **Number of Results**: If available for the selected retriever, specify the maximum number of retrieved results.
6. Click **Apply and Insert**.
7. Save your work.
8. Test your changes. Preview the prompt template and review the LLM-generated response.

Add an Ensemble Retriever to a Prompt Template

Use ensemble retrievers in prompt templates to ground your LLM prompts with relevant knowledge. An ensemble retriever is a collection of individual retrievers. When you run an ensemble retriever, it executes the individual retrievers, combines their search results into a single list, reranks the list according to relevance to the search request, and returns just the most relevant information to the prompt or agent. Ensemble retrievers conduct searches from multiple sources in parallel.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or

Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

To create and manage retrievers:

Data Cloud permission set

To run prompts with Einstein Search:

Data Cloud User permission set

 **Note** These instructions assume that the ensemble retriever has been created and configured in Einstein Studio. To learn more, see [Create an Ensemble Retriever](#).

1. In Prompt Builder, create or edit a prompt template.
2. In the Prompt Template Workspace, click where you want to insert the ensemble retriever.
3. Type @ or click **Insert Resource**, click **Retrievers**, and click **Configure Retrievers +**.
4. Select the ensemble retriever you want to add to the prompt template.
5. Optionally, change retriever settings in the Template Settings side panel.
 - a. **Descriptors**: Change the **Label** and **Description** for this retriever in your prompt template.
 - b. **Search Text**: Focus your search by specifying additional criteria. Select a resource or specify search text.
 - c. **Output Fields**: If available for the selected retriever, select one or more returned fields of data to ground your prompt.
 - d. **Number of Results**: If available for the selected retriever, specify the maximum number of retrieved results.
6. Click **Apply and Insert**.
7. Save your work.
8. Test your changes. Preview the prompt template and review the LLM-generated response.

Add a Web Retriever to a Prompt Template

Use web retrievers in prompt templates to ground your LLM prompts with relevant knowledge from web sites. Web retrievers are created when a data library that uses web search is created in Agentforce Data Library.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
 - Execute Prompt Templates
-

To create and manage retrievers:

Data Cloud permission set

To run prompts with Einstein Search:

Data Cloud User permission set

 **Note** These instructions assume that, for the data library you want to use, web search has been enabled and a web retriever has been configured with search settings and web page content. To learn more, see [Use Web Search](#) in Agentforce Data Library help.

1. In Prompt Builder, create or edit a prompt template.
2. In the Prompt Template Workspace, click where you want to insert the web retriever.
3. Type @ or click **Insert Resource**, click **Retrievers**, and click **Configure Retrievers +**.
4. Select the web retriever you want to add to the prompt template.
5. In the Template Settings side panel, for **Search Parameters**, focus your search by specifying additional criteria. Select a resource or specify search text.

Template Settings

Details Resources Resources

All > ... > Web search retriever Settings Web search retriever Settings Delete

> Properties

▽ Descriptors

Label
Web search retriever

* API Name
EinsteinSearch:sfdc_ai__WebRetrievalAct

Description
Web search retriever retrieves search results from the internet.

▽ Inputs

Type
Web

Search Parameters

* Search Text Info

Q Search for or select a resource to include
Enter search text
0/255

6. Change other template settings, if you want.
7. Click **Apply and Insert**.

8. Save your work.
9. Test your changes. Preview the prompt template and review the LLM-generated response.

Customize Retriever Output with Prefilters

Get more relevant search results using prefilters in your prompt templates. Prefilters define the conditions that limit the scope of a retriever's search so that only the most relevant information is returned. For example, you can use prefilters to retrieve content associated with only a particular country or product. The filter value, such as the country code or product Id, is specified in the prompt template at run time.

REQUIRED EDITIONS

Available in: Lightning Experience

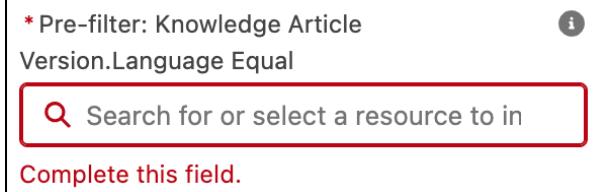
Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

User Permissions Needed	
To create and manage prompt templates in Prompt Builder:	Prompt Template Manager permission set
To create and manage retrievers:	Data Cloud permission set
To run prompts with Einstein search:	Data Cloud User permission set

 **Note** To use prefilters in Prompt Builder, the Einstein Search retriever must be configured in Einstein Studio with at least one filter condition with the Dynamic property selected. To learn more, see the instructions for defining filter conditions in [Create an Individual Retriever](#).

1. In Prompt Builder, create or edit a prompt template.
2. In the Prompt Template Workspace, click where you want to insert the retriever.
3. Type @ or click **Insert Resource**, click **Retrievers**, and click **Configure Retrievers +**.
4. Select the retriever you want to add to the prompt template.
This retriever must have at least one filter condition with the Dynamic setting enabled.
5. Under Template Settings, scroll to the Search Parameters section and find a Pre-filter input field.

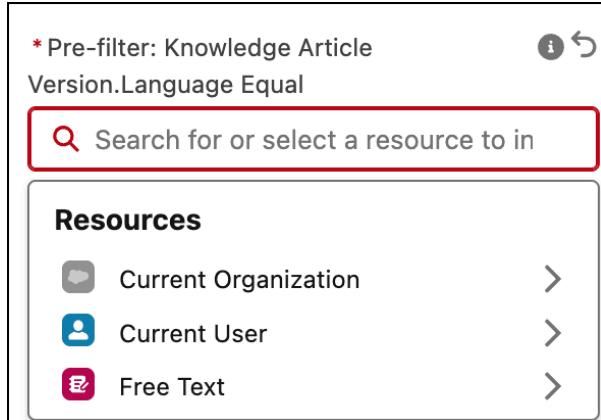
Example:



If you don't see a Pre-filter input field, go to Einstein Studio and verify that the selected retriever is configured with at least one filter condition that's configured as Dynamic.

6. Click the **Pre-filter** field to open the resource picker and select the source of the filter value for the pre-

filter field.



The selected value appears in the Pre-filter field.

7. To remove a setting, select the X. To return to a previously selected setting, select the undo () icon.
8. Change other template settings, if you want.
9. Click **Apply and Insert**.
10. Save your work.
11. Test your changes. Preview the prompt template and review the LLM-generated response.

See Also

[Create an Individual Retriever](#)

[Add a Retriever to a Field Generation Prompt Template](#)

[Ground with Knowledge Using Retrieval Augmented Generation](#)

Add Citations to Prompt Template Responses

Add citations to your prompt templates so that your users can compare and verify the generated information with the source information. Sources include content used by agent actions, knowledge articles, and web pages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

To create and manage retrievers:

Data Cloud permission set

USER PERMISSIONS NEEDED

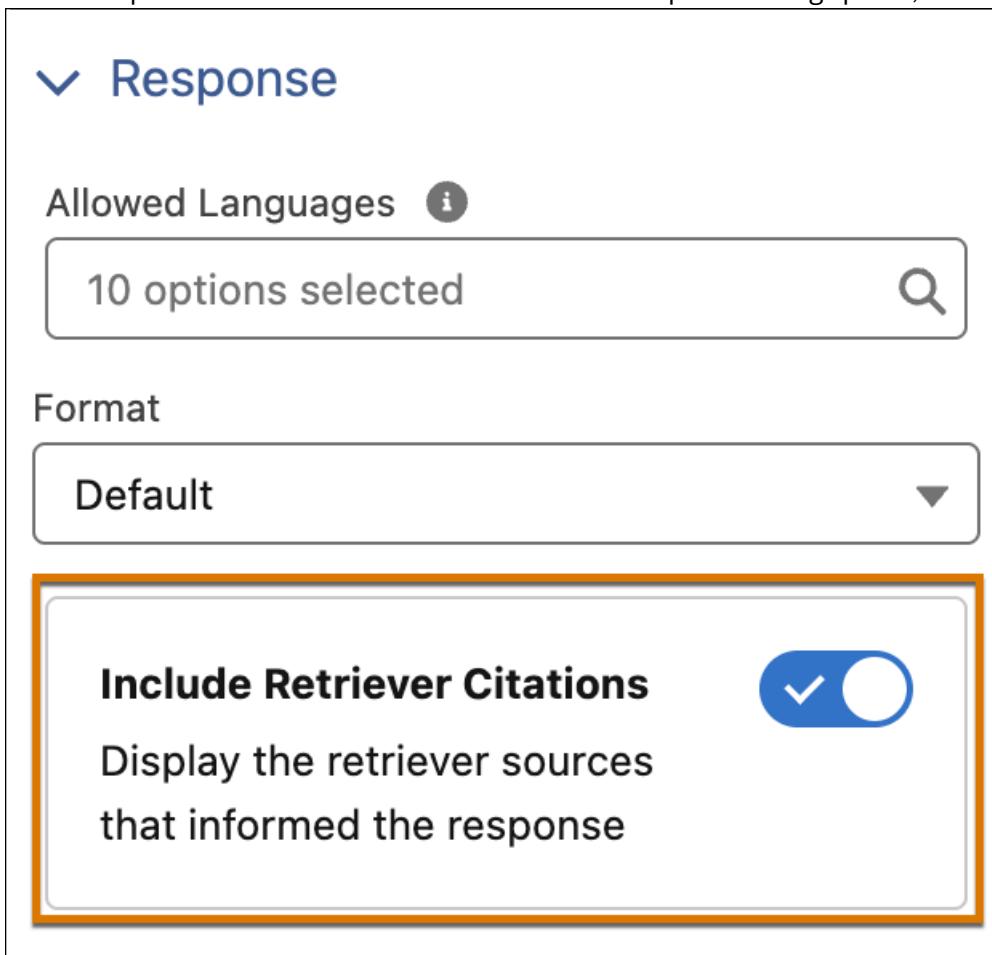
To run prompts with Einstein Search:

Data Cloud User permission set

A citation links an AI-generated response to the original source of information, such as retrieved knowledge, that was used to generate the response. To learn more, see [Build Trust in AI Responses with Citations](#).

-  **Note** Citations work with text output only. If a citation involves an image, then the output includes a clickable link to the image.

1. In Prompt Builder, create or edit a prompt template.
2. In the Prompt Template Workspace, click where you want to insert the retriever.
3. Type @ or click **Insert Resource**, click **Retrievers**, and click **Configure Retrievers +**.
4. Select the retriever you want to add to the prompt template.
5. In the Response section of the Details tab on the Template Settings panel, turn on citations.



6. Change other template settings, if you want.
7. Click **Apply and Insert**.
8. Save your work.
9. Test your changes. Preview the prompt template and review the LLM-generated response.

When you invoke the prompt template, citations show up in the LLM response. **Sources** shows a numbered, clickable list of original sources used to generate the response. The inline numbers refer to the source number in the list.



If you embed a retriever that supports images in citations, then - in your prompt responses - it's possible to see citations with links to images. Support for images requires a search index that has image processing enabled. For details, see [Get Trusted AI Responses with Retriever Citations](#).

-  **Note** Turning on citations affects the entire prompt template. If a prompt template contains multiple retrievers, then citations are returned for all of them.

See Also

- [Salesforce Help: Build Trust in AI Responses with Citations](#)
- [Salesforce Help: Citations in Retrievers](#)

Ground with Predictive AI

Ground your prompt templates with relevant knowledge and actionable intelligence from predictive models. Augment your LLM prompts with predictions, top predictors, and prescriptions.

Predictive AI and Prompt Templates

Use predictive models to improve the accuracy and contextual relevance of LLM responses. Predictive models predict future business outcomes using data from current business conditions. They're trained on past data using machine learning and statistical modeling to detect trends and patterns. To learn more, see [Key Concepts for Predictive AI](#) and [Use Outputs from Predictive Models](#).

-  **Note** You need access to the predictive model that you want to use. If you don't already have a predictive model set up, see [Create Predictive AI Models From Scratch](#) or [Bring Your Own Model](#).

Get Predictive Intelligence Using Flows

Flows can provide prompts with on-demand predictions, prescriptions, and top factors. On-demand predictions are generated dynamically within the flow of work.

1. In Flow Builder, create a flow, add a predict action to request outputs from a predictive model, and then store the output values. To learn more, see [Get Predictions in Flows](#).
2. In a prompt template, use flow merge fields to embed that data in the prompt. To learn more, see [Ground with Flow Merge Fields](#).

Get Predictive Intelligence Using Apex

Apex can provide prompts with on-demand predictions, prescriptions, and top factors. On-demand

predictions are generated dynamically within the flow of work.

1. In Apex, create an invocable action to request outputs from a predictive model. To learn more, see [Get Predictions in Apex](#).
2. In a prompt template, use Apex merge fields to embed that data in the prompt. To learn more, see [Grounding with Apex Merge Fields](#).

Get Predictive Intelligence Using REST

REST applications can provide prompts with on-demand predictions, prescriptions, and top factors. On-demand predictions are generated dynamically within the flow of work. In a REST client:

1. Request outputs from a predictive model by calling the predict endpoint in the Salesforce Data Cloud Connect REST API. To learn more, see [Get Predictions in REST Applications](#).
2. Provide those outputs as inputParams when calling the generations endpoint in the Connect REST API. To learn more, see [Einstein Prompt Template Generations](#) in the [Connect REST API Developer Guide](#).

Get Predictive Intelligence Using Data Model Objects (DMOs)

DMOs in Data 360 can provide prompts with batch or streamed predictions, prescriptions, and top factors.

1. Populate the DMO with outputs from a predictive model. You can do this via batch predictions (with batch data transforms or batch predict jobs) or streaming predictions (with predict jobs). To learn more, see [Get Predictions with Prediction Jobs](#) or [Use Predictions to Transform Data](#).
2. In a prompt template, use DMO merge fields to embed that data in the prompt. To learn more, see [Ground with Data 360 DMO Merge Fields](#).

Best Practices for Building Prompt Templates

Learn the best practices for building effective prompt templates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

- Make sure that your prompt templates are concise and easy to understand. Avoid using industry jargon or technical terms. Instead, use natural language and [conversation design best practices](#).
- To give the LLM more contextual information, ask it to role play as a character, such as a sales or support representative. Then define the character's goal. For example, include language such as, "You are a marketing executive who wants to invite major customers to a live event."

- Iterate on your prompt templates. Try achieving the same goal using different templates to see how the parts impact the model's response. Get end-user feedback to see how well your prompt templates generate the desired response.
- Choose a style, and stick to it. When you use a consistent writing style in your prompt templates, the LLM generates consistent responses. Your writing style is shaped by your word choice, intensifiers, emojis, and punctuation.
- To help the LLM differentiate between context and instructions, create an instructions section in your prompt template. On a separate line, enter Instructions:, then surround your instructions with triple quotes ("""").
- Include direct instructions for the LLM to only generate the expected type of content. For example, if you want the LLM to draft an email, add instructions such as, "Follow these instructions strictly to generate only the message to be sent to the customer." These instructions prevent the LLM from generating a response about the process of creating content, instead of just generating the content that you want.
- Start with one of the templates in the [Example Prompt Template Library](#), and customize it to fit your specific needs. Study the language that the templates use, especially the text related to writing style. You can use similar phrasing in your own templates.

See Also

[Ingredients of a Prompt Template](#)

Create a Field Generation Prompt Template

A Field Generation prompt template brings generative AI-assisted workflows to fields within Lightning record pages. Enable your users to populate a field with a summary or description created by an LLM to facilitate more productive conversations with your customers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

-
1. From Setup, in the Quick Find box, enter *Prompt Builder*, and then select **Prompt Builder**.
 2. Click **New Prompt Template**.
 - a. In the Prompt Template Type dropdown, select **Field Generation**.

- b. Specify your Prompt Template Name.
- c. Select an **Object** containing the field that you want Einstein to populate.



Note To add a field generation prompt template to a Lightning record page, you must enable Dynamic Forms, which support most, but not all, standard LWC-enabled objects. For a list of LWC-enabled objects, see [LWC Migration for Record Home Pages](#). After you finish creating the prompt template, you can enable Dynamic Forms. See [Add a Field Generation Prompt Template to a Lightning Record Page](#).

- d. Select an **Object Field**. This field is the one that you want Einstein to populate.
 - e. Optionally, you can write a Description for your prompt template.
3. Click **Create**, and you're redirected to the Prompt Template Workspace.
4. In the Prompt section, create your prompt template, preview it, and see the LLM's response.
- a. Click the Preview Settings button.
 - b. Under Inputs, search for and select a record. Available options depend on which object you selected on the New Prompt Template page.
 - c. In the Configure Response and Display sections, verify that Generate Response, Display Prompt, and Display Resolution are selected or deselected based on what you want to test.
 - d. Click **Save & Preview**, and review the response.

See Also

- [Break Up Your Record Details with Dynamic Forms](#)
[Field Generation Prompt Templates in Action](#)

Add Record Merge Fields to a Field Generation Prompt Template

Save time with templates that use specific information from your Salesforce objects to create case summaries, and more, at scale. Use merge fields in a field generation prompt template to have an LLM write content by using up-to-the-minute data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

Let's look at a field generation prompt template that uses a merge field to create an account description. It's a simple example of how to use an LLM with your up-to-the-minute data to create content.

1. In the Prompt Template Type dropdown, select **Field Generation**.
2. For the Prompt Template Name, enter *Draft an Account Description*.
3. For the Object, select **Account**.
4. For the Object Field, select **Account Description**.
5. Leave the Description field blank.
6. Click **Create**, and you're redirected to the Prompt Template Workspace.
7. In the [Field Generation Example Templates](#), find the prompt template titled: Draft an Account Description. Copy and paste this template into the Prompt Template Workspace. This example contains placeholder text for prompt template resources. Before you can run this template in Prompt Builder, use the Insert Resource selector in the Prompt section to replace the placeholders with real merge fields. When the template is resolved into a prompt, the merge fields are replaced with real data.
8. Run the prompt template and see the LLM-generated account description.
 - a. Click the Preview Settings button.
 - b. Under Inputs, enter an account name in the Record search bar, and select one.
 - c. In the Configure Response and Display sections, verify that Generate Response, Display Prompt, and Display Resolution are selected or deselected based on what you want to test.
 - d. Click **Save & Preview**, and review the response.

Add Flow Merge Fields Without Data Cloud Objects to a Field Generation Prompt Template

Create and preview an example field generation prompt template that uses a flow without Data Cloud objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

Say you want to provide up-to-the-minute summaries of customer cases for a given customer to your company's sales team before they make customer calls. Create a field generation prompt template that integrates a flow that obtains case data for an LLM to summarize.

Before creating your field generation prompt template, create a Get Open Cases for Account flow that

gets a list of open customer cases.

1. To create the Get Open Cases for Account flow from Flow Builder, see [Example of Field Generation Template-Triggered Prompt Flow](#).

After the flow is ready, let's create a new Open Case Summary custom field, and use a preconfigured example prompt template that uses merge fields to generate a summary of open cases for a selected account.

2. For the Account object, create an Open Case Summary custom field.

- a. In Setup, open the **Object Manager**.
- b. Select the **Account** label.
- c. On the left side of the page, click **Fields & Relationships**.
- d. Click **New** to create the field.
- e. For Data Type, select **Text Area (Long)**, then click **Next**.
- f. For Field Label, enter *Open Case Summary*, then click **Next**.
- g. On the Establish field-level security page, click **Next**.
- h. Click **Save**.

3. In Prompt Builder, create a prompt template.

- a. For Prompt Template Type, select **Field Generation**.
- b. For the Prompt Template Name, enter *Summarize Open Cases*.
- c. For the Object, select **Account**. Remember that to insert a flow into a prompt template, the flow's Object must be the same data type as the prompt template's flow resource.
- d. For the Object Field, select **Open Case Summary**.
- e. Leave the Description field blank.
- f. Click **Create**, and you're redirected to the Prompt Template Workspace.

4. In the [Example Prompt Template Library](#), find the field generation prompt template "Summarize open cases for an account." Copy and paste this template into the Prompt Template Workspace.

5. Before you can run this template in Prompt Builder, in the Prompt section, click **Insert Resource**. The search field appears the first time you click this option.

6. Use the search bar to replace the placeholders with real merge fields. Then, add a reference to the Get Open Cases for Account flow that you created.

- a. If you used the example template, delete the `<Get_Open_Cases_For_Account__Prompt__Flow>` placeholder.
- b. Click **Insert Resource** and use the search bar to select **Flows**.
- c. To add the flow to your template, select **Get Open Cases for Account**.

7. Run the prompt template and see the LLM-generated summary of open cases.

- a. Click the Preview Settings button.
- b. Under Inputs, search for and select an account name in the Record search bar.
- c. In the Configure Response and Display sections, verify that Generate Response, Display Prompt, and Display Resolution are selected or deselected based on what you want to test.
- d. Click **Save & Preview**, and review the response.

To create a dynamic Lightning record page that displays your open case summary for an account, see [Add a Field Generation Prompt Template to a Lightning Record Page](#).

Add Flow Merge Fields with Data 360 Objects to a Field Generation Prompt Template

Build a flow that uses unified Data 360 object data to get a 360-degree view of an account, and then add a flow merge field to your prompt template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

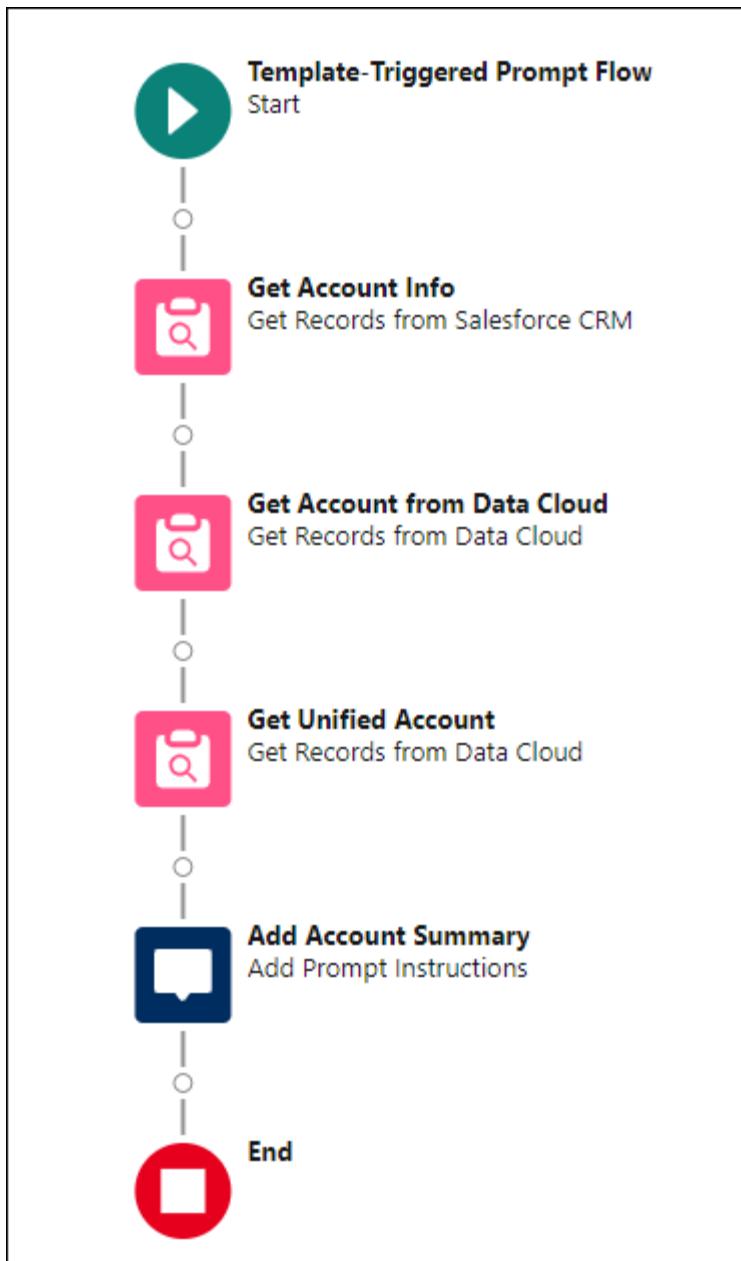
To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

In this example, we create a flow that uses the standard Salesforce CRM Account object to look up data in the Account and Unified Account Data 360 objects. Unified objects consolidate data from multiple data sources. To learn more about data consolidation, see [Unify Source Profiles](#). This example uses the standard data bundles for the Salesforce CRM connector. Your Data 360 setup, objects, and fields can differ.

Before creating the field generation prompt template, create a prompt template flow that gets account data from Data 360. For this example, you create the Get Account Activity from Data Cloud prompt template flow. In Flow Builder, the flow looks like this.



1. Turn on Einstein.
 - a. From Setup, in the Quick Find box, enter *Einstein Setup*, and then click **Einstein Setup**.
 - b. Turn on Einstein.
2. Create the flow.
 - a. From Setup, in the Quick Find box, enter *Flows*, and then click **Flows**.
 - b. Click **New Flow**.
 - c. From Flow Builder, select **Template-Triggered Prompt Flow**, and then click **Create**.
3. Configure the flow.
 - a. For Prompt Template Type Capability, select **Field Generation Template Capability**.
A capability makes it possible to pass data between the flow and the prompt template. When you create a prompt template in Prompt Builder, you select its prompt template type.
 - b. For Object, select **Account**.
4. Add a Get Records element. This Get Records element retrieves the account information.

- a. For Label, enter *Get Account Info*.
 - b. For Data Source, select **Salesforce Object**.
 - c. For Object, select **Account**.
 - d. For Condition Requirements, select **None—Get All Account Records**.
 - e. For How Many Records to Store, click **Only the first record**.
5. Add another Get Records element and configure it. This Get Records element gets the Data Cloud account object that corresponds to the Salesforce CRM account object.
- a. For Label, enter *Get Account from Data Cloud*.
 - b. For Data Source, select **Data Cloud Object**.
 - c. For Data Space, select the data space that you want to use, for example, **default**.
 - d. For Object, select your account data model object (DMO), for example, **Account**.
 - e. For Condition Requirements, select **All Conditions Are Met (AND)**.
 - f. For Field, select the field that represents the account ID, for example, **ssot_Id__c**.
 - g. For Operator, select **Equals**.
 - h. For Value, select **{!Get_Account_Info.Id}**.
 - i. For How Many Records to Store, click **Only the first record**.
6. Add a third Get Records element. This Get Records element retrieves the unified account that's linked to your Data Cloud account object.
- a. For Label, enter *Get Unified Account*.
 - b. For Data Source, select **Data Cloud Object**.
 - c. For Data Space, select the same data space as before.
 - d. For Object, select your unified account DMO, for example, **Unified Account 0001**.
 - e. For Condition Requirements, select **All Conditions Are Met (AND)**.
 - f. For Field, select the field that represents the account name, for example, **ssot_Name__c**.
 - g. For Operator, select **Equals**.
 - h. For Value, select **{!Get_Account_from_Data_Cloud.ssot__Name__c}**.
 - i. For How Many Records to Store, click **Only the first record**.
7. Add the Create Prompt Instructions element.
- a. For Label, enter **Add Account Summary**.
 - b. For Prompt Instructions, enter:
`Account details: Account Name is
{!Get_Unified_Account.ssot__Name__c};Account Description is
{!Get_Unified_Account.ssot__Description__c};Account Type is
{!Get_Unified_Account.ssot__AccountTypeId__c};Account Last Modified Date is
{!Get_Unified_Account.ssot__LastModifiedDate__c}.`
8. Save your work, and click **Activate**.

Now you can insert the prompt template flow into the field generation prompt template “Summarize open cases for an account” from the [Field Generation Example Templates](#). For a step-by-step guide about how to add a flow merge field to a field generation prompt template, see [Add Flows Without Data 360 Objects to a Field Generation Prompt Template](#).

Add Apex Merge Fields to a Field Generation Prompt Template

Create an example field generation prompt template that uses Apex.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

Say you want to provide up-to-the-minute summaries of customer cases for a given customer to your company's sales team before they make customer calls. We used the same use case in the flow section.

This time, you want to create a field generation prompt template that integrates an Apex class that obtains case data for an LLM to summarize.

Here's the Apex class that we access as a resource in a prompt template.

```
public class OpenCasesPrompt {  
    @InvocableMethod(label='Open Cases'  
        description='Find Cases for an Account'  
        CapabilityType='PromptTemplateType://einstein_gpt__fieldCompletion')  
    public static List<Response> getCasesPrompt(List<Request> requests) {  
        // Validate the expected number of requests as an input  
        if (requests.size() != 1)  
            throw new ListException('The requests list must contain one entry only');  
        Account a = requests[0].RelatedEntity;  
        ID searchAcctId = a.Id;  
        List<Case> cases =  
            [SELECT Id, Subject, Description  
             FROM Case  
             WHERE AccountId = :searchAcctId AND Status != 'Closed'  
             WITH USER_MODE];  
        string responseData = null;  
        if(cases.isEmpty()) {  
            responseData = 'There are no open cases.';  
        } else {  
            for(Case c : cases) {  
                responseData =
```

```

        (responseData != null) ? responseData + '\n' : '';
        responseData += String.format('Case details: {0}, {1}.',
            new List<Object>{c.Subject, c.Description});
    }
}

List<Response> responses = new List<Response>();
Response res = new Response();
res.Prompt = responseData;
responses.add(res);
return responses;
}

public class Request {
    @InvocableVariable(required=true)
    public Account RelatedEntity;
}

public class Response {
    @InvocableVariable
    public String Prompt;
}
}
}

```

The requirements for the Apex class are explained in [Grounding with Apex Merge Fields](#).

Test coverage is important so let's add a [test class](#). The test class simulates data sent from Prompt Builder. Two test cases are provided: one for when events are found, and one for when there are no events.

```

@IsTest
public class OpenCasesPrompt_Test {

    @IsTest
    public static void findMatchingCasesForAccount() {
        Account a = new Account(Name='Test Account');
        insert a;
        Case c1 = new Case(Subject='Test Case', Description='Important Case',
            Status='New', AccountId=a.id);
        Case c2 = new Case(Subject='Test Case 2',
            Description='Case Description', Status='In-progress',
            AccountId=a.id);
        Case c3 = new Case(Subject='Test Case Closed',
            Description='Closed Case', Status='Closed', AccountId=a.id);
    }
}

```

```
insert new List<Case>{c1, c2, c3};

List<OpenCasesPrompt.Request> requestsInput
    = new List<OpenCasesPrompt.Request>();
OpenCasesPrompt.Request request = new OpenCasesPrompt.Request();
request.RelatedEntity = a;
requestsInput.add(request);

Test.startTest();
List<OpenCasesPrompt.Response> responses =
    OpenCasesPrompt.getCasesPrompt(requestsInput);
Test.stopTest();

Assert.AreEqual(1, responses.size());
OpenCasesPrompt.Response response = responses[0];

Assert.AreEqual('Case details: Test Case, Important Case.\n' +
    'Case details: Test Case 2, Case Description.',
    response.Prompt);
}

@IsTest
public static void noCasesForAccountResponse() {
    List<OpenCasesPrompt.Request> requestsInput
        = new List<OpenCasesPrompt.Request>();
    OpenCasesPrompt.Request request = new OpenCasesPrompt.Request();
    request.RelatedEntity = new Account();
    requestsInput.add(request);

    List<OpenCasesPrompt.Response> responses =
        OpenCasesPrompt.getCasesPrompt(requestsInput);
    Assert.AreEqual(1, responses.size());

    OpenCasesPrompt.Response response = responses[0];
    Assert.AreEqual('There are no open cases.', response.Prompt);
}
}
```

Now that the Apex class is ready, let's call it from Prompt Builder. Before we can do that, we must create a custom field called Open Case Summary on the Account object. The custom field should have a data type of Text Area (Long). See [Create Custom Fields](#). Log out and log in again so that you can see the new custom field in Prompt Builder.

In Prompt Builder, create a new prompt template.

1. For Prompt Template Type, select **Field Generation**.
2. For the Prompt Template Name, enter *Apex: Summarize Open Cases*.
3. For the Object, select **Account**.
4. For the Object Field, select **Open Case Summary**.
5. Leave the Description field blank.
6. Click **Create**, and you're redirected to the Prompt Template Workspace.
7. In the [Example Prompt Template Library](#), find the field generation prompt template: Summarize open cases for an account. Copy and paste this template into the Prompt Template Workspace.
8. Before you can run this template in Prompt Builder, in the Prompt section, click **Insert Resource**. The search field appears the first time you click this option.
 - a. Delete the <account.Id_Merge_Field> placeholder.
 - b. Click the **Resource** search bar, and select **Account | Account ID**.
 - c. Delete the <Get_Open_Cases_For_Account__Prompt__Flow> placeholder.
 - d. Click the **Resource** search bar, and select **Apex**.
 - e. To add the *OpenCasesPrompt* Apex class to your template, select **Open Cases**. Open Cases is the label attribute that you set in the *@InvocableMethod* annotation in the *OpenCasesPrompt* Apex class.

Add a Retriever to a Field Generation Prompt Template

Add a retriever to a field generation prompt template by selecting it from the Resource field.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

To create and manage retrievers:

Data Cloud permission set

To run prompts with Einstein Search:

Data Cloud User permission set

This topic walks through the steps to create and preview a prompt template that uses an Einstein Search retriever to create an account description. You must create a retriever in Einstein Studio before you can use it in a prompt template. See [Use a Custom Retriever](#) for more information. This example uses a custom retriever named ESearchAccountDescription to search through an internal knowledge store of account description information stored as unstructured data.

1. In Prompt Builder, create a prompt template and select **Field Generation** from the Prompt Template Type dropdown.
2. Enter a Prompt Template Name and Description.
3. Define a resource. In this example, we select **Account** for the Object, and **Account Description** for the Object Field.
4. Click **Next** to go to the Prompt Template Workspace.
5. In the [Example Prompt Template Library](#), find the Field Generation prompt template Draft an Account Description. Copy and paste this template into the Prompt Template Workspace.
In the instructions, add the text, *Use the following information that's related to the account:*
6. In the Prompt section, type @ or click **Insert Resource**, click **Retrievers**, and click **Configure Retrievers +**.
7. Select the retriever you want to add to the prompt template.
8. Optionally, change retriever settings in the Template Settings side panel.
 - a. **Descriptors:** Change the **Label** and **Description** for this retriever in your prompt template.
 - b. **Search Text:** Focus your search by specifying additional criteria. Select a resource or specify search text.
 - c. **Output Fields:** If available for the selected retriever, select one or more returned fields of data to ground your prompt.
 - d. **Number of Results:** If available for the selected retriever, specify the maximum number of retrieved results.
9. Click **Apply and Insert**.
After adding the retriever to the prompt template, you can customize the search parameters in the Preview Settings panel.
10. In the Preview Settings panel, click the Search Text field and type or select your query.

In this example, we type `account name:` in the search text. Next, we find and select the Account Name resource in the search field. Then, we type `account industry:` in the search text and find and select Account Industry in the search field.

Our final Search Text looks like this:

`account name: Input.Account.Name`

`account industry: Input.Account.Industry`

11. Select the Number of Results. We use `10` for this example.
12. Click **Save**.
13. Run the prompt template and see the LLM-generated description.
 - a. Click the Preview Settings button.
 - b. Under Inputs, search for and select an account in the Accounts search bar.
 - c. In the Configure Response and Display sections, verify that Generate Response, Display Prompt, and Display Resolution are selected or deselected based on what you want to test.
 - d. Click **Preview**. Review the response.

See Also

[Trailhead: Retrieval Augmented Generation: Quick Look](#)

Create a Flex Prompt Template

For any use case that isn't covered by the other template types, a flex prompt template type is your solution. Craft a flex prompt template that uses AI to generate content for your unique business cases.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

-
1. From Setup, in the Quick Find box, enter *Prompt Builder*, and then select **Prompt Builder**.
 2. Click **New Prompt Template**.
 3. In the Prompt Template Type dropdown, select **Flex**.
 4. Specify your Prompt Template Name.
 5. (Optional) Add a Description for your prompt template.
 6. (Optional) Define a resource by clicking the **Add** button at the bottom of the resources list. You can add up to 5 resources. To remove a resource, click the  button to the right of the object.
 7. Define a resource that you want this prompt to use for generating content, as well as any fields or content types that you want to populate. For each Object, give a unique Name and API Name.
For example, to create a text message for a customer with an open case, select the **Case** object, and name it *Customer Case*
 8. Use the checkbox under each resource to mark it as required for the prompt template.
 9. Click **Next**, and you're redirected to the Prompt Template Workspace.
 10. In the Prompt Template Workspace, create your prompt template, preview it, and see the LLM's response.
 - a. In Preview Settings, select an object for each resource. Available options depend on which object you selected on the New Prompt Template page.
 - b. Click **Save & Preview**, and review the response.

Add Record Merge Fields to a Flex Prompt Template

Save time with templates that use specific information from your Salesforce objects to create unique and

detailed product descriptions, custom text messages, and more, at scale. Use merge fields in a flex template to have an LLM write content based on up-to-the-minute data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
 - Execute Prompt Templates
-

Let's look at a flex prompt template that uses a merge field. Say you work at a company that regularly informs customers about new promotions with text messages. Your customer service team spends a significant amount of time writing these texts from scratch for every promotion. Using an LLM to write these promotions can make this process more efficient and dynamic.

1. In the Prompt Template Type dropdown, select **Flex**.
2. For the Prompt Template Name, enter *Ask about a Case*.
3. Leave the Description field blank.
4. Define a resource. For the Object, select **Case**. For the Name, enter *Customer Case*.
5. Click **Next**, and you're redirected to the Prompt Template Workspace.
6. Write a prompt template from scratch, or copy and paste an example template.
 - a. To use an example prompt, copy one of the examples from the [Flex Example Templates](#), and paste it into the Prompt section.
 - b. Before you can run this template in Prompt Builder, in the Prompt section, click **Insert Resource** to replace the placeholders with real merge fields. The search field appears the first time you click this option.
 - c. When the template is resolved into a prompt, the merge fields are replaced with real data, shown in the Resolved Prompt section.
7. Run the prompt template, and see the LLM-generated text message.
 - a. Click the Preview Settings button.
 - b. Under Inputs, search for and select a case in the Case search bar.
 - c. In the Configure Response and Display sections, verify that Generate Response, Display Prompt, and Display Resolution are selected or deselected based on what you want to test.
 - d. Click **Save & Preview**, and review the response.

Add Flow Merge Fields to a Flex Prompt Template

Build a flow that compiles information from multiple sources, and then add a flow merge field to your prompt template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

Let's create and preview an example flex prompt template. Say you want to generate a newsletter from Product records and Product Service Campaign records. Create a flex prompt template that integrates a flow that obtains record data for an LLM to summarize.

1. In Flow Builder, create a Template-Triggered Prompt Flow to work with your flex template.
 - a. Click **New Flow**, and then select the Template-Triggered Prompt Flow card.
 - b. Build a flow that gets information on new products and current product service campaigns. See [Build a Flow](#).
 - c. Save the flow with the label *Get Products and Campaign*.
 - d. Click **Activate**.
2. In Prompt Builder, create a flex prompt template.
 - a. For Prompt Template Type, select **Flex**.
 - b. For the Prompt Template Name, enter *Generate a Newsletter*.
 - c. Leave the Description field blank.
 - d. Define a resource. For the Object, select **Product**.
 - e. Add a second resource. Click **Add**. For the new object, select **Product Service Campaign**.
 - f. Click **Create**.You're redirected to the Prompt Template Workspace.
3. In the [Example Prompt Template Library](#), find the flex prompt template "Generate a Newsletter." Copy and paste this template into the Prompt Template Workspace.
4. Save your work.
5. In Prompt Builder, edit your Generate a Newsletter prompt template to replace the flow placeholder with the flow you activated.
 - a. In the Prompt Template Workspace, delete the `{!$Flow:Get_Products_and_Campaigns.Prompt}` placeholder.

- b. Click the **Resource** search bar and select **Flows**.
 - c. To add this flow to your template, select **Get Products and Campaigns**.
6. Run the prompt template and see the LLM-generated newsletter.
- a. Click the Preview Settings button.
 - b. Under Inputs, search for and select a product name in the Product search bar.
 - c. Enter a product service campaign name in the Product Service Campaign search bar, and then select it.
 - d. In the Configure Response and Display sections, verify that Generate Response, Display Prompt, and Display Resolution are selected or deselected based on what you want to test.
 - e. Click **Save & Preview**. Review the response.

Add Apex Merge Fields to a Flex Prompt Template

Create an example Flex prompt template that uses Apex.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

Before adding the Apex fields, create an Apex class to use as a resource in the template. The class's input variables must be a subset of the inputs to the template. The API name in the Apex class must match the API name in the template for each String input type and for any sobject input type used for more than one input in the template.

For instance, this example has two Account inputs in the prompt. To distinguish them, the object API names must match the corresponding template inputs. The single Case input does not need to match because there's only one input of the Case type. You create the template `API Name` fields and their input when you create the prompt template in the UI.

```
public class ApexFlexTemplateExample1 {  
  
    @InvocableMethod  
    public static List<Response> getPrompt(List<Request> requests) {  
        Request input = requests[0];
```

```
List<Response> responses = new List<Response>();
Response output = new Response();
responses.add(output);

output.Prompt = 'generate a summary using the following info:';
// account_1 matches the API Name for the input
output.Prompt += '\nAccount 1: ' + input.account_1.Name;
output.Prompt += '\nAccount 2: ' + input.account_2.Name;
output.Prompt += '\nCase Number: ' + input.case_1.CaseNumber;

return responses;
}

// Type and API Name of all variables must match the template
public class Request {
    @InvocableVariable(required=true)
    public Account account_1;
    @InvocableVariable(required=true)
    public Account account_2;
    @InvocableVariable(required=true)
    public Case case_1;
}

public class Response {
    @InvocableVariable
    public String Prompt;
}
}
```

-  **Note** The output variable in the Response class should always be named "Prompt" in order for it to be discovered by the Resource Picker in the Prompt Builder UI.

In this example, we create a flex template that takes two accounts and one case.

1. In Prompt Builder, click **New Prompt Template**.
2. In the Prompt Template Type field, select **Flex**.
3. In the Prompt Template Name field, enter *Flex - Apex Example1*.
4. In the Define Resources section, enter the objects that the template uses.
 - a. For the first row, enter *account_1* in the Name field. In the Object field, select **Account**. Click **Add**.
 - b. For the second row, enter *account_2* in the Name field. In the Object field, select **Account**. Click **Add**.
 - c. For the third row, enter *case_1* in the Name field. In the Object field, select **Case**.
5. Click **Next**.
6. Click **Save**.

7. Reload the template.

In Prompt Builder, add the `ApexFlexTemplateExample1` class as a resource in the Flex template.

This example shows you how to send inputs for a Flex prompt template to an Apex class. The use case is simple but the concept is powerful. You can use Apex to process the records for your real-world use case.

Add Free Text Inputs to a Flex Prompt Template

Create a flex prompt template that includes free text inputs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

Free text inputs are a non-record type of input field consisting solely of text. You can include free text input fields in your flex prompt templates in the same way that you include merge fields or other resources from the resource picker. This functionality allows you to handle scenarios where you want your prompt template to receive free text as an input. For example, customers submitting questions in a form field, reading a file and sending the contents to the prompt, or handling any situation where you want to send arbitrary text to a flex prompt template in Prompt Builder.

Imagine you're a prompt admin and you want to design a prompt that answers a customer's question about a specific product on your website. A flex prompt template that handles free text input is an elegant solution for this common situation elegantly. You can even use the opportunity to remind your customer about a current promotion you're running.

 **Note** User input functionality is available only in flex templates and supports up to 127,000 characters.

To get started, create a prompt template.

1. In the Prompt Template Type dropdown, select **Flex**.
2. For the Prompt Template Name, enter *Product Question Response and Promotion*.
3. In the Define Sources section, define three sources.

- a. For the first row, enter *Product* in the Name field. Select **Object** as the Source Type. For the Object field, select *Product*. This row represents the product your customer is asking about.
 - b. For the second row, enter *User Question* in the Name field. Select **Free Text** as the Source Type. This row represents the text input your customer provides, in the form of a question.
 - c. For the third row, enter *Promotion* in the Name field. Select **Object** as the Source Type. For the Object field, select *Product Service Campaign*. This row represents the promotion you'll tell your customer about.
4. Click **Next**.
- You're redirected to the Prompt Template Workspace.
5. Write a prompt template from scratch, or copy and paste an example template.
 - a. If you want to base your prompt template on the template used in this example, copy and paste the example template text provided at the bottom of the page, and then edit it.
 - b. Before you can run the template in Prompt Builder, in the Prompt section, click **Insert Resource** to use the search bar to replace the placeholders with real merge fields. The search field appears the first time you click this option.
 - c. When the template is resolved into a prompt, the merge fields are replaced with real data and shown in the Resolved Prompt section.
 6. In the Preview Settings panel, select a product for the Product field, enter a sample question in the User Question field, and select a promotion for the Promotion field.
 7. Click **Save & Preview** to see the LLM-generated response.



Example Text from example:

```
A customer on our site is asking the following question about {!$Input:Product.Name}. Do your best to answer the customer's question.

!!!
{!$Input:User_Question}
!!!

In addition to answering their question, be sure to mention {!$Input:Promotion.ProductServiceCampaignName} to the customer.
```

Add File Inputs to a Flex Prompt Template

Create a flex prompt template that includes image files.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
 - Execute Prompt Templates
-

Here's an example scenario of a flex prompt template that uses a file input. Say you're designing a prompt template to verify product images in an e-commerce listing before publication. Your Flex prompt template compares uploaded product images to the listing description to ensure that colors, sizes, and details are accurately represented. You're interested because this prompt template helps maintain consistency across listings and improves product accuracy and customer trust.

To get started, create a prompt template.

1. In the Prompt Template Type dropdown, select **Flex**.
2. For the Prompt Template Name, enter *Image Comparison*.
3. In the description field, enter *E-Commerce Product Image Verification*.
4. Define three resources. For the first image, enter:
 - a. Name: *Image1*
 - b. API Name: *Image1*
 - c. Source Type: **Object**
 - d. Object: *File*
5. Click **Add**.
6. For the second image, enter:
 - a. Name: *Image2*
 - b. API Name: *Image2*
 - c. Source Type: **Object**
 - d. Object: *File*
7. Click **Add**.
8. For the product description, enter:
 - a. Name: *Description*
 - b. API Name: *Description*
 - c. Source Type: **Object**
 - d. Object: *Product2*
9. Click **Next**, and you're redirected to the Prompt Template Workspace.
10. Copy and paste the example prompt template
 - a. To use the example prompt, copy the E-Commerce Product Image Verification prompt in the [Flex Example Templates](#). Then, paste it into the Prompt Template Workspace.
 - b. Before you can run this template in Prompt Builder, in the Prompt section, click **Insert Resource**.
 - c. In the Inputs menu, replace the description placeholder with a real merge field.
11. Add the related list to the prompt template, from the Resource picker, click **Product2**, then **Notes & Attachments**.
12. In Template Settings, under Model, select **GPT 4 Omni**.

13. In Preview Settings, click **Inputs**. In the Inputs section, you see the three objects that you created.
14. Click **Select File** to choose a file stored in your org. You can select an existing file or upload a new one.
15. Select a product for your description grounding data.
16. After the files and the product description are added, click **Save & Preview** to test the prompt template. You can also preview attached images in the Resolved Prompt section.

Add a Related List with File Inputs to a Flex Prompt Template

Create a flex prompt template that includes a related list with file inputs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

Say you're a Business Analyst that evaluates potential service providers for your clients. Your team spends a lot of time reviewing multiple files and images for each provider to determine if they meet the client's needs. By using an LLM that can process file input, you can automate the analysis and summary of these details. This will help you quickly decide if a company is right for the client's specific problems.

To get started, create a prompt template.

1. In the Prompt Template Type dropdown, select **Flex**.
2. For the Prompt Template Name, enter *Analyze Account*.
3. In the description field, enter *Summarize a company description and check its relevance using files*.
4. Define a resource.
 - a. Name: *Account*
 - b. API Name: *Account*
 - c. Source Type: **Object**
 - d. Object: **Account**
5. Click **Next**, and you're redirected to the Prompt Template Workspace.
6. Copy and paste the example prompt template
 - a. To use the example prompt, copy the Image Verification for Account Relevance prompt in the [Flex Example Templates](#). Then, paste it into the Prompt Template Workspace.

- b. Before you can run this template in Prompt Builder, in the Prompt section, click **Insert Resource**. The search field appears the first time you click this option.
 - c. Use the Resource field to replace the description placeholder with a real merge field. Add the related list to the prompt template, from the Resource picker, click **Account**, and click then **Notes & Attachments**.
7. In Template Properties, under Models, select **GPT 4 Omni**.
 8. Click **Save**.
 9. Select an account to test the prompt template.
 10. Click **Preview** to test the prompt template. In the Resolution, the attached images can also be previewed.

See Also

[Create a Flex Prompt Template](#)

Create an Answer Questions with Knowledge Prompt Template

Enable agents to answer questions using the Answer Questions with Knowledge prompt template in Prompt Builder. Specify what information Einstein includes, or adjust the voice and tone so that answers fit your business needs.

REQUIRED EDITIONS

Einstein generative AI is available in Lightning Experience. Setup for Einstein generative AI is available in Lightning Experience.

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

To use Prompt Builder, you must first enable and provision [Data 360](#) and [Prompt Builder](#). To create and customize an Answer Questions with Knowledge prompt template, you must first create an [Agentforce Data Library](#).

To customize the Answer Questions with Knowledge template, we recommend that you copy and edit the standard prompt template. In the standard prompt template we've added the key pieces of a successful prompt, including instructions for the LLM, data resources, and relevant inputs like the user query. You can still add and test your own instructions if you copy the standard Answer Questions with Knowledge prompt template.

Customize the Standard Answer Questions with Knowledge Prompt Template

Customize the Answer Questions with Knowledge standard prompt template.

REQUIRED EDITIONS

Einstein generative AI is available in Lightning Experience. Setup for Einstein generative AI is available in Lightning Experience.

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

USER PERMISSIONS NEEDED

To create and manage prompt templates in prompt builder: Prompt Template Manager permission set

To customize the Answer Questions with Knowledge template, we recommend that you copy and edit the standard prompt template. In the standard prompt template, we've added the key pieces of a successful prompt, including instructions for the LLM, data resources, and relevant inputs like the user query. You can still add and test your own instructions if you copy the standard Answer Questions with Knowledge prompt template.

1. From Setup, in the Quick Find box, search for and select **Prompt Builder**. If you have Agentforce Data Library set up and active, under Prompt Templates is the Answer Questions with Knowledge prompt template with the Knowledge Answers template type.
2. To edit the standard prompt template, click the Answer Questions with Knowledge prompt template and you're redirected to the Prompt Template Workspace. Click **Save As** and a new version opens in the workspace.

The standard prompt template user instructions include the task for the LLM, link to a data source, the user query, and any response limits. See [Review, Revise, and Repeat: Ensure That a Prompt Template Is Effective](#).

To test the Answer Questions with Knowledge prompt template, you need the Query and Retriever ID. The Query is the question asked by the user. For testing purposes you can enter any query related to your data source. The retriever is already created and activated in Einstein Studio. To get the Retriever ID or name, go to the retriever setup in Einstein Studio. See [Manage Retrievers](#).



Note When you add your own instructions to the prompt template or include a different retriever, your results will differ from using the standard Answer Questions with Knowledge prompt template. This applies to AI agents and generative AI features that use an Agentforce Data Library.

3. When you're happy with your template and Einstein's responses, click **Save & Activate**. Once it's active, your customized prompt template is used when a user asks an agent a question.

At runtime, the latest active Answer Questions with Knowledge prompt template is used for AI agents and generative AI features. If there are multiple active Answer Questions with Knowledge prompt templates, the latest active custom template is used instead of a modified standard template. To make sure you're using the right prompt template with your agents, check you have only one active at a time.

See Also

[Agent Action: Answer Questions with Knowledge](#)

[Agentforce Data Library](#)

Create a Sales Email Prompt Template

Connect with customers using emails that leverage your customer relationship history and insights. To generate personalized, targeted emails at scale, design a sales email prompt template. Because you can reuse your template for different products and customers, getting an LLM to write your emails saves you time and makes email workflows easier.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with the Einstein for Sales add-on, which is available for an extra cost in **Performance** and **Unlimited** Editions

USER PERMISSIONS NEEDED

To send sales emails that use Einstein generative AI: Einstein Sales Emails permission set

 **Note** To build Sales Email prompt templates, turn on Sales Emails in Setup and assign a permission set to your users. See [Set Up Sales Emails](#) or [Set Up Sales Emails for Partners](#)

1. From Setup, in the Quick Find box, enter *Prompt Builder*, and then select **Prompt Builder**.
2. Click **New Prompt Template**.
 - a. In the Prompt Template Type dropdown, select **Sales Email**.
 - b. Enter your Prompt Template Name. The Prompt Template Name and optional Description that you choose appear in the list of custom email types that your users can choose from in the email composer.
 - c. Select a **Recipient** to define which type of object that the email is for.
 - d. Optionally, write a Description for your prompt template.
 - e. Optionally, select an **Object** to include data from a related object, such as Account, in the generated email.
3. Click **Next**, and you're redirected to the Prompt Template Workspace. The Prompt Template Workspace is where you add and revise your prompt template instructions. Here, you can write a template from scratch or copy and paste an example template.
4. In the Prompt Template Workspace, create your prompt template, run it, and see the LLM's response.
 - a. Click the **Preview Settings** button.
 - b. Under Inputs, search for and select a recipient. Available options are defined by the recipient object that you selected on the Create Prompt Template page.
 - c. In the Configure Response and Display sections, verify that Generate Response, Display Prompt, and Display Resolution are selected or deselected based on what you want to test.
 - d. Click **Save & Preview**.
 - e. Review the LLM's generated email in the Response section.

The custom sales email prompt template that you created is available in the email composer on contacts and leads for users to whom you've assigned permissions. Prompts are available to internal users working from Lightning Experience and partner users working from Experience Cloud sites.

Add Record Merge Fields to a Sales Email Prompt Template

Merge fields are critical to scaling a sales email prompt template for multiple customers and products. They connect your prompt templates to Salesforce record fields, such as from sales or service records. In a prompt template, a merge field acts like a placeholder. After you run the template, the LLM replaces the merge field with your actual data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

To add a merge field to a prompt template in Prompt Builder, click the **Insert Resource** selector and select a resource from the dropdown menu of placeholder values for your CRM data.

Let's look at a sales email prompt template that uses merge fields. Say your sales team spends a significant amount of time writing introduction emails from scratch for leads or contacts.

Using an LLM to write these descriptions is more efficient, and the LLM can use your up-to-the-minute data to create content. To get started, create a prompt template.

1. In the Prompt Template Type dropdown, select **Sales Email**.
2. For the Prompt Template Name, enter *Draft an Introduction Email*.
3. For the Recipient Type, select **Contact**.
4. Leave the Template Description and Object fields empty.
5. Click **Next**.
6. In the [Example Prompt Template Library](#), find the sales email prompt template titled: Draft an introduction email for a new lead or contact. Copy and paste this template into the Prompt Template Workspace.
7. This example contains placeholder text for prompt template resources. Before you can run this template in Prompt Builder, in the Prompt section, click **Insert Resource**. The search field appears the first time you click this option.

8. Use the search bar to replace the placeholders with real merge fields. When the template is resolved into a prompt, the merge fields are replaced with the real email sender's name and the recipient's name and company.
9. To run the prompt template and see the LLM-generated email draft:
 - a. Click the Preview Settings button.
 - b. Under Inputs, enter a contact name in the Recipient search bar and select it. This selection defines the recipient of the LLM-generated email draft.
 - c. In the Configure Response and Display sections, verify that Generate Response, Display Prompt, and Display Resolution are selected or deselected based on what you want to test.
 - d. Click **Save & Preview**, and review the resolved prompt and the response.

Add Flow Merge Fields Without Data 360 Objects to a Sales Email Prompt Template

Create and preview an example sales email prompt template that uses a flow.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

Say you're a Salesforce admin and your sales team requests an easier way to send emails to contacts about nearby Marketing events.

Create an email prompt template that launches a flow to get Marketing events in the same city and state as each contact. Use a flow to get a list of events and their locations for the LLM.

1. To create the Get Marketing Events flow from Flow Builder, see [Example of Sales Email Template-Triggered Prompt Flow](#).
2. When the flow is ready, let's use an example prompt template that uses merge fields and your new flow to generate an email about nearby Marketing events for a selected contact.
In Prompt Builder, create a prompt template.
 - a. In the Prompt Template Type dropdown, select **Sales Email**.
 - b. For the Prompt Template Name, enter *Nearby Events Marketing Email*.
 - c. For the Recipient Type, select **Contact**. Remember that to insert a flow into a prompt template, the

- flow's Recipient Type has to be the same data type as the prompt template's flow resource.
- d. Leave the Description blank.
 - e. Click **Next**, and you're redirected to the Prompt Template Workspace.
3. In the [Example Prompt Template Library](#), find the sales email prompt template "Draft an email for a contact about regional marketing events." Copy and paste this template into the Prompt Template Workspace.
 4. Before you can run this template in Prompt Builder, use the Resource field in the Prompt section to replace the placeholders with real merge fields. Then, add a reference to the real Marketing Events Summary flow that you created.
 - a. In the Prompt Template Workspace, delete the <Get_Events_Near_Contact__Prompt__Flow> placeholder.
 - b. Click the **Resource** search bar and select **Flows**.
 - c. To add this flow to your template, select **Get Marketing Events**.
 5. Run the prompt template and see the LLM-generated email draft.
 - a. Click the Preview Settings button.
 - b. Under Inputs, search for a contact name in the Recipient search bar and select it. This selection defines the recipient of the LLM-generated email draft.
 - c. In the Configure Response and Display sections, verify that Generate Response, Display Prompt, and Display Resolution are selected or deselected based on what you want to test.
 - d. Click **Save & Preview**, and review the response.

Add Flow Merge Fields with Data 360 Objects to a Sales Email Prompt Template

Create and preview an example sales email prompt template that uses a flow with Data 360 objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

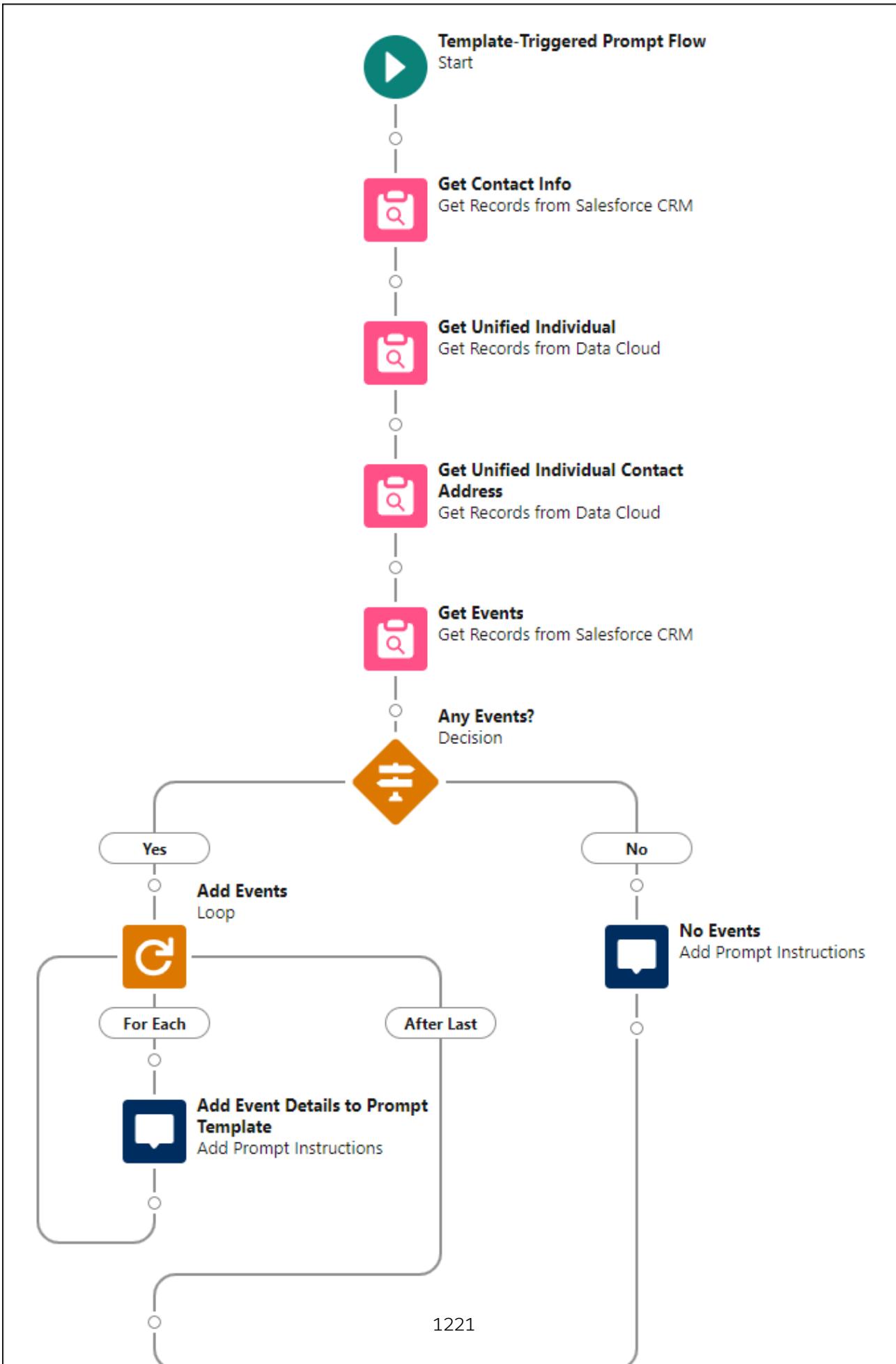
- Manage Prompt Templates
- Execute Prompt Templates

Say you're a Salesforce admin, and your sales team requests an easier way to send emails to contacts about nearby Marketing events.

Your sales team wants to use Data 360 data to get information about each contact's location. By using

Data 360 data, you can use information that was consolidated across multiple data sources. This information can be more up to date than the contact record alone. To learn more about data consolidation, see [Unify Source Profiles](#). This example uses the standard data bundles for the Salesforce CRM connector. Your Data 360 setup, objects, and fields can differ.

You create an email prompt template that launches a prompt template flow to get Marketing events in the same city and state as your contact. You use a flow to get a list of events and their locations for the LLM. In Flow Builder, the flow looks like this.



1. Turn on Einstein.
 - a. From Setup, in the Quick Find box, enter *Einstein Setup*, and then click **Einstein Setup**.
 - b. Turn on Einstein.
2. Create the flow.
 - a. From Setup, in the Quick Find box, enter *Flows*, and then click **Flows**.
 - b. Click **New Flow**.
 - c. From Flow Builder, select **Template-Triggered Prompt Flow**, and then click **Create**.
3. Configure the flow.
 - a. For Prompt Template Type Capability, select **Sales Email Template Capability**.

A capability makes it possible to pass data between the flow and the prompt template. When you create a prompt template in Prompt Builder, you select its prompt template type.
 - b. For Recipient, select **Contact**.
4. Add a Get Records element. This Get Records element retrieves contact information.
 - a. For Label, enter *Get Contact Info*.
 - b. For Data Source, select **Salesforce Object**.
 - c. For Object, select **Contact**.
 - d. For Condition Requirements, select **None—Get All Contact Records**.
 - e. For How Many Records to Store, click **Only the first record**.
5. Add another Get Records element. This Get Records element finds the unified individual data from Data Cloud that matches the contact information.
 - a. For Label, enter *Get Unified Individual*.
 - b. For Data Source, select **Data Cloud Object**.
 - c. For Data Space, select the data space you want to use, for example **default**.
 - d. For Object, select your unified individual data model object (DMO), for example **Unified Individual 0000**.
 - e. For Condition Requirements, select **All Conditions Are Met (AND)**.
 - f. For Field, select the field that represents the contact's first name, for example **ssot_FirstName__c**.
 - g. For Operator, select **Equals**.
 - h. For Value, select **{!Get_Contact_Info.FirstName}**.
 - i. Click **Add Condition**.
 - j. For Field, select the field that represents the contact's last name, for example **ssot_LastName__c**.
 - k. For Operator, select **Equals**.
 - l. For Value, select **{!Get_Contact_Info.LastName}**.
 - m. Click **Add Condition**.
 - n. For Field, select the field that represents the contact's birth date, for example **ssot_BirthDate__c**.
 - o. For Operator, select **Equals**.
 - p. For Value, select **{!Get_Contact_Info.Birthdate}**.
 - q. For How Many Records to Store, click **Only the first record**.
6. Add a third Get Records element. This Get Records element retrieves the unified individual's contact information.
 - a. For Label, enter *Get Unified Individual Contact Address*.
 - b. For Data Source, select **Data Cloud Object**.
 - c. For Data Space, select the same data space as before.
 - d. For Object, select your unified individual contact point address DMO, for example **Unified Indv Contact Point Address 0000**.

- e. For Condition Requirements, select **All Conditions Are Met (AND)**.
 - f. For Field, select **ssot_Id__c**.
 - g. For Operator, select **Equals**.
 - h. For Value, select **{!Get_Unified_Individual.ssot__Id__c}**.
 - i. For How Many Records to Store, click **Only the first record**.
7. Finally, add a fourth Get Records element to get event data.
- a. For Label, enter *Get Events*.
 - b. For Object, select **Event**.
 - c. For Condition Requirements, select **All Conditions Are Met (AND)**.
 - d. For Field, select **IsArchived**.
 - e. For Operator, select **Equals**.
 - f. For Value, select **\$GlobalConstant.False**.
 - g. Click **Add Condition**.
 - h. For Field, select **Location**.
 - i. For Operator, select **Contains**.
 - j. For Value, select **{!Get_Unified_Individual_Contact_Address.ssot__CityId__c}**.
 - k. Click **Add Condition**.
 - l. For Field, select **Location**.
 - m. For Operator, select **Contains**.
 - n. For Value, select **{!Get_Unified_Individual_Contact_Address.ssot__StateProvinceId__c}**.
 - o. For How Many Records to Store, click **All Records**.
8. Add the Decision element.
- a. For Label, enter *Any Events?*
 - b. On New Outcome, for Label, enter *Yes*.
 - c. For Condition Requirements to Execute Outcome, select **All Conditions Are Met (AND)**.
 - d. For Resource, select **Events from Get_Events**.
 - e. For Operator, select **Is Null**.
 - f. For Value, select **\$GlobalConstant.False**.
 - g. Click **Default Outcome**.
 - h. For Label, delete the text, and enter *No*.
9. For the No outcome path, add the Create Prompt Instructions element.
- a. For Label, enter *No Events*.
 - b. For Prompt Instructions, enter *No upcoming Marketing events near you*.
10. For the Yes outcome path, add the Loop element.
- a. For Label, enter *Add Events*.
 - b. For Collection Variable, select **Events from Get Events**.
11. On the For Each path, add the Prompt Instructions element.
- a. For Label, enter *Add Event Details to Prompt Template*.
 - b. For Prompt Instructions, enter: *Event details: {!Add_Events.Subject},
{!Add_Events.Description}, {!Add_Events.Location}, Start Time:
{!Add_Events.StartDateTime}*.
12. Click **Save**.
13. For Flow Label, enter *Marketing Events Summary*.
14. Save your changes, and click **Activate**.

Now, you can insert the prompt template flow into the sales email prompt template “Draft an email for a contact about regional marketing events” from the [Example Prompt Template Library](#). For a step-by-step guide to adding a prompt template flow to a sales email prompt template, see [Add Flows Without Data 360 Objects to a Sales Email Prompt Template](#).

Add Apex Merge Fields to a Sales Email Prompt Template

Create an example sales email prompt template that uses Apex.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

Say you’re a Salesforce admin, and your sales team requests an easier way to send emails to contacts about nearby Marketing events.

You create an email prompt template that launches an Apex class to get Marketing events in the same city and state as your contact. The Apex class gets a list of events and their locations for the LLM.

Here’s the Apex class that we access as a resource in a prompt template.

```
public class ContactEventsPrompt {  
    @InvocableMethod(label='Contact Events'  
        description='Find Events for a Contact'  
        CapabilityType='PromptTemplateType://einstein_gpt_salesEmail')  
    public static List<Response> getContactsPrompt(List<Request> requests) {  
        // validate the expected number of requests as an input  
        if (requests.size() != 1)  
            throw new ListException('The requests list must contain one entry  
only');  
        Contact c = requests[0].Recipient;  
        // Protect against SOQL Injection  
        string searchCity = '%' + c.MailingCity + '%';  
        string searchState = '%' + c.MailingState + '%';
```

```
List<Event> events =
    [SELECT Id, Subject, Description, Location, StartDateTime
     FROM Event
     WHERE IsArchived = false AND Location LIKE :searchCity
           AND Location LIKE :searchState WITH USER_MODE];
string responseData = '';

if(events.isEmpty()) {
    responseData = 'No upcoming Marketing events near you.';
} else {
    for(Event e : events) {
        responseData += 'Event details: ';
        responseData += e.Subject;
        responseData += ', ';
        responseData += e.Description;
        responseData += ', ';
        responseData += e.Location;
        responseData += '/nStart Time: ';
        responseData += e.StartDateTime.format();
        responseData += '.';
    }
}

List<Response> responses = new List<Response>();
Response res = new Response();
res.Prompt = responseData;
responses.add(res);
return responses;
}

public class Request {
    @InvocableVariable(required=true)
    public User Sender;
    @InvocableVariable(required=true)
    public Contact Recipient;
}

public class Response {
    @InvocableVariable
    public String Prompt;
}
}
```

The requirements for the Apex class are explained in [Grounding with Apex Merge Fields](#).

Test coverage is important so let's add a [test class](#). The test class simulates data sent from Prompt Builder. Two test cases are provided: one for when events are found, and one for when there are no events.

```
@IsTest
public class ContactEventsPrompt_Test {
    @IsTest
    public static void noEventsForContactResponse() {
        List<ContactEventsPrompt.Request> requestsInput
            = new List<ContactEventsPrompt.Request>();
        ContactEventsPrompt.Request request
            = new ContactEventsPrompt.Request();
        request.Recipient = new Contact();
        requestsInput.add(request);
        List<ContactEventsPrompt.Response> responses =
            ContactEventsPrompt.getContactsPrompt(requestsInput);
        Assert.AreEqual(1, responses.size());
        ContactEventsPrompt.Response response = responses[0];
        Assert.AreEqual('No upcoming Marketing events near you.',
            response.Prompt);
    }

    @IsTest
    public static void findMatchingEventsForContact() {
        Contact c = new Contact(LastName='TestContact',
            MailingCity='San Francisco', MailingState='CA');
        insert c;
        Event e = new Event(Subject='Test Event', Description='Big Event',
            Location='415 Mission St, San Francisco, CA 94105, USA',
            StartDateTime=DateTime.newInstance(2023,09,28),
            DurationInMinutes=5 );
        insert e;
        List<ContactEventsPrompt.Request> requestsInput
            = new List<ContactEventsPrompt.Request>();
        ContactEventsPrompt.Request request
            = new ContactEventsPrompt.Request();
        request.Recipient = c;
        requestsInput.add(request);

        Test.startTest();
        List<ContactEventsPrompt.Response> responses =
            ContactEventsPrompt.getContactsPrompt(requestsInput);
```

```
Test.stopTest();  
Assert.AreEqual(1, responses.size());  
ContactEventsPrompt.Response response = responses[0];  
Assert.AreEqual(formatEventString(e), response.Prompt);  
}  
  
private static String formatEventString(Event event) {  
    String formattedEventString = 'Event details: ';  
    formattedEventString += event.Subject;  
    formattedEventString += ', ';  
    formattedEventString += event.Description;  
    formattedEventString += ', ';  
    formattedEventString += event.Location;  
    formattedEventString += '/nStart Time: ';  
    formattedEventString += event.StartDateTime.format();  
    formattedEventString += '.';  
    return formattedEventString;  
}  
}
```

Now that the Apex class is ready, let's call it from Prompt Builder.

In Prompt Builder, create a new prompt template.

1. In the Prompt Template Type dropdown, select **Sales Email**.
 2. For the Prompt Template Name, enter *Apex: Nearby Events Marketing Email*.
 3. For the Recipient Type, select **Contact**.
 4. Leave the Description field blank.
 5. Click **Create**, and you're redirected to the Prompt Template Workspace.
 6. In the [Example Prompt Template Library](#), find the sales email prompt template “Draft an email for a contact about regional marketing events.” Copy and paste this template into the Prompt Template Workspace.
 7. Before you can run this template in Prompt Builder, in the Prompt section, click **Insert Resource**. The search field appears the first time you click this option.
 8. Use the search bar to replace the placeholders with merge fields.
 - a. In the Prompt Template Workspace, delete the `<Get_Events_Near_Contact__Prompt__Flow>` placeholder.
 - b. In the Prompt section, click the **Resource** search bar, and select **Apex**.
 - c. Select **Contact Events** to add the `ContactEventsPrompt` Apex class to your template. Contact Events is the label attribute that you set in the `@InvocableMethod` annotation in the `ContactEventsPrompt` Apex class.
- The Apex class is inserted into the prompt template as `Apex:ContactEventsPrompt`.
- d. Delete the `<sender.Name__Merge_Field>` placeholder.

- e. Click the **Resource** search bar, and select **Sender | Full Name**.
- f. Delete the `<recipient.Name__Merge_Field>` placeholder.
- g. Click the **Resource** search bar, and select **Recipient | Full Name**.
- h. Delete the `<recipient.Company__Merge_Field>` placeholder.
- i. Click the **Resource** search bar, and select **Current Organization | Name**.

Add Data Graphs to a Sales Email Prompt Template

Create and preview an example sales email prompt template that uses data graphs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

This topic walks through the steps to create and preview a sales email prompt template. It uses a data graph to generate an email that introduces the new account owner to the contact.

1. To create a data graph, start by establishing a data stream using the Contact object. See [Create a Salesforce CRM Data Stream](#).
2. After the data stream is deployed, map the Contact object to an Individual DMO. See [Map Data Model Objects](#).
3. Create a data graph to work with your Sales Email template.
 - a. From the App Launcher, search for and select **Data Graphs**.
 - b. Click **New**, and click **Start from Scratch**.
 - c. Choose a near real-time data graph or a real-time data graph.
 - d. For Data Graph Name, enter *Contact Overview*.
 - e. For the primary data model object, select **Individual** and select or enter a value for the remaining property fields.
 - f. Click **Next**.
 - g. Build a data graph that gets account information. See [Create a Data Graph](#).
4. When the data graph is active, let's use an example prompt template that uses merge fields and your new data graph to incorporate account data into an introduction email. In Prompt Builder, create a prompt template.
 - a. In the Prompt Template Type dropdown, select **Sales Email**.

- b. For the Prompt Template Name, enter *Introduction Email*.
 - c. For the Recipient, select **Contact**.
 - d. Click **Next**, and you're redirected to the Prompt Template Workspace.
5. In the [Example Prompt Template Library](#), find the sales email prompt template "Draft an Introduction Email to the Account Contact." Copy and paste this template into the Prompt Template Workspace.
 6. Save your work.
 7. Before you run this template in Prompt Builder, in the Prompt section, use the Resources field to replace the placeholders with real merge fields. Then, add a reference to the Contact Overview data graph that you created.
 - a. In the Prompt section, delete the placeholder <Get_Detailed_Account_DataGraph>.
 - b. Click the **Resources** search bar, select **Account** and select **Data Graphs**.
 - c. To add the data graph to your template, select **Contact Overview**.
 8. Run the prompt template and see the LLM-generated email draft.
 - a. Click the **Preview Settings** button.
 - b. Under Inputs, search for and select a contact name in the Contact search bar.
 - c. In the Configure Response and Display sections, verify that Generate Response, Display Prompt, and Display Resolution are selected or deselected based on what you want to test.
 - d. Click **Save & Preview**. Review the response.

Review, Revise, and Repeat: Ensure That a Prompt Template Is Effective

Generative AI uses LLMs to generate output. Because LLMs are trained by other organizations, it's common to first receive an LLM response that isn't quite right, even if the prompt seems clear. If the output doesn't meet your expectations, you can generate a new output by revising your prompt template. The generated output from the previous attempt isn't saved, and the new output replaces it. With Prompt Builder, it's easy to edit your prompt template until you're completely satisfied with a response.

[Add a New Input to an Existing Prompt Template](#)

Add a new object, free text input, or data model object to an existing prompt template.

[Add a New Action to a Prompt Template](#)

Add a new action such as Flow, Apex, or Retriever to a prompt template.

[Configure an Action in a Prompt Template](#)

Modify existing actions in Prompt Builder like Flows, Apex or, Retrievers and add them directly to your prompt.

[Revise a Prompt Template](#)

Perfecting a prompt template is an iterative process. You revise the prompt template, regenerate a resolved prompt and response, and then make further revisions based on that updated response. Every time you run a prompt template in Prompt Builder, you create a unique call to the LLM. That means that resolving the same prompt can produce different responses. Remember to review every response for accuracy, even if you've run the template before.

[Preview a Resolved Prompt](#)

In the Resolved Prompt section of your workspace, you can review a prompt that's grounded with real Salesforce record data.

Preview a Generated Response

In the Response section of your workspace, you can review a response that's grounded with real Salesforce record data.

Configure the Generated Response Format

Select JSON or HTML to control the format of generated responses.

Enabling Resolution to Review a Prompt Template

When you enable resolution, you can review the resolved prompt that's generated from your prompt template. Through a process called prompt resolution, Prompt Builder replaces each merge field in the prompt template with real CRM data related to the records that you selected.

Evaluate the Quality of a Response

When you preview a generated response, evaluate how well the response meets the goals of the prompt. Make sure that the response is factually accurate and doesn't contain harmful content or bias.

Harmful Content Notification in a Prompt Response

Learn how Prompt Builder alerts you to potentially harmful content in a prompt template response.

Work with Large Prompts

When a prompt is too large for the model to use, a summary is generated automatically in the Resolution panel using OpenAI models . You can decide to use the summarized prompt or create a smaller prompt.

Add a New Input to an Existing Prompt Template

Add a new object, free text input, or data model object to an existing prompt template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

Add a new input to an existing prompt template:

1. In the Prompt Builder canvas, click **Properties** .
2. Click **Resources** and then the  icon.

3. Select the input type that you want to create and all related details to the input.
4. Deselect **Require when template runs** checkbox to make the input optional.
5. Click **Next**. Add the new input from the Inputs section in Resources to your prompt template.

Add a New Action to a Prompt Template

Add a new action such as Flow, Apex, or Retriever to a prompt template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

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- Manage Prompt Templates
- Execute Prompt Templates

To add a new action to a prompt template:

1. In the Prompt Builder canvas, select one of the following options: type @, click **Insert Resource**, or in Template Settings, select **Resources**.
2. Select the action type.
3. Select the specific action.

Configure an Action in a Prompt Template

Modify existing actions in Prompt Builder like Flows, Apex or, Retrievers and add them directly to your prompt.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
 - Execute Prompt Templates
-

To configure a new action:

1. In the Prompt Builder canvas, type @ and select **Configure Action**, or in **Template Settings**, go to the **Resources** tab and select the plus sign in the Actions section to configure a new action.
2. Select the action type you want to configure.
3. Select the specific action you want to configure to view the action's metadata. In the resource picker, retrievers don't show up automatically. To find an available retriever, click **Configure Search +**, then select and configure it.
4. In the Descriptors section, update the action's label or description as needed.
5. In the Inputs section, provide or update the inputs related to the action.
6. If any changes were made, click **Apply and Insert** to update the action with the new or updated input(s).

Revise a Prompt Template

Perfecting a prompt template is an iterative process. You revise the prompt template, regenerate a resolved prompt and response, and then make further revisions based on that updated response. Every time you run a prompt template in Prompt Builder, you create a unique call to the LLM. That means that resolving the same prompt can produce different responses. Remember to review every response for accuracy, even if you've run the template before.

REQUIRED EDITIONS

Available in: Lightning Experience

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To revise a prompt template, edit your prompt template text directly in the Prompt Template Workspace. Then regenerate the response by clicking **Save & Preview**.

When you edit a prompt template, we recommend that you:

- Experiment with different selected records to ensure that the LLM produces consistent responses.
- Save your template early and often. You can also create a copy of your prompt template by clicking **Save As**.
- Study the language of the templates in the [Example Prompt Template Library](#), especially the text related to writing style. You can use similar phrasing in your own templates.

For more information about creating effective prompt templates, see [Best Practices for Building Prompt Templates](#).

Preview a Resolved Prompt

In the Resolved Prompt section of your workspace, you can review a prompt that's grounded with real Salesforce record data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

-
1. Create a prompt template with merge fields.
 2. Click **Preview Settings**.
 3. In the Inputs section, select test data for your merge fields.
 4. In the Display section, click **Display Resolution**.
 5. Click **Preview**.

Each time you click Preview, the prompt is displayed with the grounding data that was selected in the Preview Settings. To ensure your prompt template yields your expected results, modify the prompt template and preview again before sending the prompt template (with masked data) to the LLM.

See Also

[Evaluate the Quality of a Response](#)

Preview a Generated Response

In the Response section of your workspace, you can review a response that's grounded with real Salesforce record data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

-
1. Create a prompt template with merge fields.
 2. Click **Preview Settings**.
 3. In the Inputs section, select the test data for your merge fields.
 4. In the Configure Response section, turn on Generate Response.

Each time you click Preview, the LLM generates a new response, even if you haven't changed your prompt template. To ensure that your prompt template yields consistent results, generate multiple responses per record, and then compare the responses.

See Also

[Evaluate the Quality of a Response](#)

Configure the Generated Response Format

Select JSON or HTML to control the format of generated responses.

REQUIRED EDITIONS

Available in: Lightning Experience

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USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

-
1. Create a prompt template with merge fields.
 2. Click **Template Settings**.
 3. In the Response section, select the format for the generated response.
 4. Click **Save & Preview**.

Each time you click Preview, the LLM generates a new response with the selected format.

Enabling Resolution to Review a Prompt Template

When you enable resolution, you can review the resolved prompt that's generated from your prompt template. Through a process called prompt resolution, Prompt Builder replaces each merge field in the prompt template with real CRM data related to the records that you selected.

REQUIRED EDITIONS

Available in: Lightning Experience

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Resolution is enabled by default. Use the resolved prompt and the response to guide your prompt template revisions.

For each merge field, the field value of the selected record is inserted into the prompt.

Example Record Merge Field	Example Resolved Merge Field
Input:Account.Id	001XXXXXXXXXXXXXXIAC

For each flow merge field, the response text is inserted into the prompt.

Example Flow Merge Field	Example Resolved Merge Field
Flow:Get_Open_Cases_for_Account	Case details: Our Widgets have not been delivered. Widgets were scheduled to have arrived 06/07/2023. No shipping updates since 06/06/2023.
	Case details: Wrong Widget model in order. Order was 500 cases of Widget A. Received 500 cases of Widget B. Order was fulfilled on 06/04/2023.
	Case details: Widgets broken before warranty expiration date. Widget C has broken and cannot be repaired. The warranty expires on 10/23/2023, but Widget C broke on 10/01/2023. Can a replacement be provided?

For each Apex merge field, the response string is inserted into the prompt.

Example Apex Merge Field	Example Resolved Merge Field
<pre>Apex:OpenCasesPrompt</pre>	<p>Case details: Our Widgets have not been delivered. Widgets were scheduled to have arrived 06/07/2023. No shipping updates since 06/06/2023.</p> <p>Case details: Wrong Widget model in order. Order was 500 cases of Widget A. Received 500 cases of Widget B. Order was fulfilled on 06/04/2023.</p> <p>Case details: Widgets broken before warranty expiration date. Widget C has broken and cannot be repaired. The warranty expires on 10/23/2023, but Widget C broke on 10/01/2023. Can a replacement be provided?</p>

See Also

[Ground Prompt Templates with Salesforce Resources](#)

Evaluate the Quality of a Response

When you preview a generated response, evaluate how well the response meets the goals of the prompt. Make sure that the response is factually accurate and doesn't contain harmful content or bias.

REQUIRED EDITIONS

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To assess a response's effectiveness, it's helpful to ask yourself questions about these topics.

Topic	Questions
Relevance	Is the response relevant in this context? Does the response fit in with the conversation or content that surrounds it?
Goal Completion	Does the response fulfill the goals of the prompt? Does it address everything that the prompt requests?
Style and Tone	Is the style, voice, and tone of the response appropriate? Is the response's vocabulary and punctuation correct?
Factual Accuracy	Does the response correctly incorporate the grounded data? Is the information in the response complete and accurate? Does the response

Topic	Questions
	contain redundant, excess, or erroneous information?
Consistency	How varied is the response? When you regenerate the response without changing the prompt template, how does the response change? How does the response change when you ground the prompt with different data?
Toxicity	Is the response safe? Does it avoid potentially harmful content, such as offensive, disrespectful, or abusive language? LLMs are trained on huge amounts of data, which puts the model at risk for producing toxic verbiage that leaks into your responses.
Bias	Does the response reflect fairness and inclusivity? Does it assume the gender identity of a person based on their name alone, sideline participants with disabilities, or displace assumptions about race or socioeconomic status? LLMs are trained on huge amounts of data, which puts the model at risk for producing biased verbiage that leaks into your responses.

See Also

[Best Practices for Building Prompt Templates](#)

Harmful Content Notification in a Prompt Response

Learn how Prompt Builder alerts you to potentially harmful content in a prompt template response.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

The Einstein Trust Layer scans the large language model (LLM) prompt responses for toxic language, including violent, abusive, hateful, or sexual language, imagery, or themes that can cause harm.

When toxic language is detected, the harmful content badge appears in the Response section. The badge displays a warning count and highlights the specific verbiage that triggered the alert.

If the Harmful Content badge appears, update and retest the prompt template to remove the toxic content. If the reassessed template no longer contains toxic content, the badge warning count returns to 0.

Work with Large Prompts

When a prompt is too large for the model to use, a summary is generated automatically in the Resolution panel using OpenAI models . You can decide to use the summarized prompt or create a smaller prompt.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

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Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

Example Prompt Template Library

This library of example prompt templates gives you a starting point for creating your own custom prompt templates.

[Use Example Prompt Templates](#)

To get started with Prompt Builder, customize one of the example prompt templates from the library.

[Sales Email Example Templates](#)

These example prompt templates cover typical use cases for sales emails.

[Field Generation Example Templates](#)

These example prompt templates cover typical use cases for field generation.

[Flex Example Templates](#)

These example prompt templates cover a few use cases for flex.

Use Example Prompt Templates

To get started with Prompt Builder, customize one of the example prompt templates from the library.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

1. Choose an example prompt template in the [Prompt Template Library](#). that's similar to your use case. Then create a template that has the same field values as the example. For guidance on creating templates, see [Create a Sales Email Prompt Template](#) or [Create a Field Generation Prompt Template](#).
2. Copy and paste the example template into the Prompt Template Workspace.
3. Customize the template and replace the placeholder resource text with real merge fields. You can learn how to build prompt flows in [Add Flow Merge Fields Without Data 360 Objects to a Sales Email Prompt Template](#) and [Add Flow Merge Fields Without Data Cloud Objects to a Field Generation Prompt Template](#).
4. Save the template, and preview the model's response.

Review and revise your prompt templates until the LLM produces the responses you want. For tips on how to revise prompts, see [Review, Revise, and Repeat: Ensure That a Prompt Template Is Effective](#).

See Also

[Salesforce AI Use Case Library](#)

Sales Email Example Templates

These example prompt templates cover typical use cases for sales emails.

-  **Important** The example templates contain placeholder text for prompt template resources. Before previewing the model's response to an example template, replace each placeholder with a merge field.

Draft an Introduction Email for a New Lead or Contact

Prompt Template Type: Sales Email

Recipient Type: Lead or Contact

This prompt template contains placeholder text for these merge fields.

- `<sender.Name_Merge_Field>`
- `<sender.Company_Merge_Field>`
- `<recipient.Name_Merge_Field>`
- `<recipient.Company_Merge_Field>`

 **Example**

You're an Account Executive and your name is `<sender.Name_Merge_Field>` from an organization called `<sender.Company_Merge_Field>` and you sell commercial solar panels.

Your prospect is `<recipient.Name_Merge_Field>` from the company `<recipient.Company_Merge_Field>`.

You want to tell your prospect how <sender.Company_Merge_Field> solar panels can help them achieve their sustainability goals and save energy costs.

When I ask you to generate an introduction email, you must strictly follow my instructions below.

Instructions:

"""

Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.

Generate a subject line that can increase open rate using words and content that is related to the email body content.

Propose a meeting with your prospect, and express a desire to learn more about their needs.

Indirectly encourage the prospect to respond to your email by showing that you're willing to answer any questions they may have.

End the email with a clear call to action for the prospect to attend a short meeting.

"""

Now generate the introduction email to your prospect.

Draft an Email for a Contact About Regional Marketing Events

Prompt Template Type: Sales Email

Recipient Type: Contact

This prompt template contains placeholder text for these merge fields.

- <sender.Name_Merge_Field>
- <recipient.Name_Merge_Field>
- <recipient.Company_Merge_Field>
- <Get_Events_Near_Contact_Prompt_Flow>. See [Add Flow Merge Fields Without Data 360 Objects to a Sales Email Prompt Template](#).

Example

You're an Account Executive and your name is <sender.Name_Merge_Field> from Ursa Major Solar. Your prospect is <recipient.Name_Merge_Field> from <recipient.Company_Merge_Field>.

You're following up with your contact to invite them to an event near them where they can learn more about the products they are considering purchasing.

When I ask you to generate an email, you must strictly follow my instructions below.

Instructions:

"""

Generate a subject line that can increase open rate using words and content that is related to the email body content. It must be no longer than 60 characters.

Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.

Indirectly encourage the contact to respond to your email by showing that you're willing to answer any questions they have.

Add the following event information to the email: <Get_Events_Near_Contact_Prompt_Flow>.

End the email with a clear call to action to attend the event.

"""

Now generate the email to your contact.

Draft a Follow-up Email that Contains an Event Survey

Prompt Template Type: Sales Email

Recipient Type: Lead

This prompt template contains placeholder text for these merge fields.

- <sender.Name_Merge_Field>
- <sender.Company_Merge_Field>
- <recipient.Name_Merge_Field>
- <recipient.Company_Merge_Field>
- <Get_Event_And_Survey_For_Lead_Prompt_Flow>

Example

You're an Account Executive and your name is <sender.Name_Merge_Field> from <sender.Company_Merge_Field>. Your lead is <recipient.Name_Merge_Field> from <recipient.Company_Merge_Field>.

You're following up with your lead after they attended an event and are asking them to complete a survey about their experience at the event.

When I ask you to write a follow up email to your lead, you must strictly follow my instructions below.

Instructions:

"""

Generate a subject line that can increase open rate using words and content that is related to the email body content. It must be no longer than 60 characters.

Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.

The body of the email should thank them for attending the event and ask them to complete a survey.

Add the following event information and survey to the email: <Get_Event_An_d_Survey_For_Lead_Prompt_Flow>.

End the email with a call to action to complete the survey.

"""

Now generate the follow up email to your lead.

Draft an Introduction Email to an Account Contact

Prompt Template Type: Sales Email

Recipient Type: Contact

This prompt template contains placeholder text for these merge fields.

- <contact.Name_Merge_Field>
- <Get_Detailed_Account_Data_DataGraph>



Example

You're an Account Executive and your name is <currentUser.Name_Merge_Field>.

You're contacting the account contact to notify them you're the new account owner. When I ask you to create an email, generate an email to a specific account owned by the contact. You must strictly follow my instructions below.

Instructions:

"""

Generate a subject line that is related to the email body content.

Introduce `<currentUser.Name__Merge_Field` as the new account owner.

Notify `<contact.Name__Merge_Field` of the following information about the account.

Be specific with the detailed info in this profile:

`<Get_Detailed_Acount_Data__DataGraph`

It must be no longer than 60 characters. Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language. Indirectly encourage the contact to respond to your email by showing that you're willing to answer any questions they have.

"""

Now generate the introduction email to your contact.

See Also

[Salesforce AI Use Case Library](#)

Field Generation Example Templates

These example prompt templates cover typical use cases for field generation.

 **Important** The example templates contain placeholder text for prompt template resources. Before previewing the model's response to an example template, replace each placeholder with a merge field.

Draft an Account Description

Prompt Template Type: Field Generation

Object: Account

Object Field: Account Description

This prompt template contains placeholder text for these merge fields.

- <User.CompanyName__Merge_Field>
- <account.Name__Merge_Field>

Example

You're a copywriter at <User.CompanyName__Merge_Field> and you need to create an account description for <account.Name__Merge_Field>.

When I ask you to create the account description, you must strictly follow my instructions below.

Instructions:

"""

Write a description no longer than 500 characters.

"""

Now create the account description.

Summarize Open Cases for an Account

Prompt Template Type: Field Generation

Object: Account

Object Field: Open Case Summary (Custom Field)

This prompt template contains placeholder text for a merge field.

- <account.Id__Merge_Field>
- <[Get_Open_Cases_for_Account_Prompt_Flow](#)>. See [Add Flow Merge Fields Without Data Cloud Objects to a Field Generation Prompt Template](#).

Example

You're a support representative, and you need to create a short summary of all open cases

for account <account.Id__Merge_Field>.

When I ask you to summarize the open cases, you must strictly follow my instructions below.

Instructions:

"""

Summarize the open cases in one paragraph no longer than 500 characters. Mention how many open cases there are and what the case issues are.

Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.

Use the following information to write the summary: <Get_Open_Cases_for_Account_Prompt_Flow>.

Do not attribute any positive or negative traits in the summary.

"""

Now create the summary.

Summarize Account Activity

Prompt Template Type: Field Generation

Object: Account

Object Field: Description

This prompt template contains placeholder text for these merge field.

- <account.Name_Merge_Field>
- <Get_History_For_Account_Prompt_Flow>



Example

You're a sales representative who needs to create a short summary of the account history for <account.Name_Merge_Field>.

When I ask you to summarize the account history, you must strictly follow my instructions below.

Instructions:

"""

Summarize the account activity history in one paragraph no longer than 1000 characters.

Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.

Use the following information to write the summary: <Get_History_For_Account_Prompt_Flow>.

Do not attribute any positive or negative traits in the summary.

"""

Now create the summary.

See Also

[Salesforce AI Use Case Library](#)

Flex Example Templates

These example prompt templates cover a few use cases for flex.

 **Important** The example templates contain placeholder text for prompt template resources. Before previewing the model's response to an example template, replace each placeholder with a merge field.

Follow-up Text Message for a Customer Case

Prompt Template Type: Flex

Resource Object: Case

This prompt template contains placeholder text for these merge fields.

- `{!$Customer_Case.Owner.Name}`
- `{!$Customer_Case.Contact.Name}`
- `{!$Input:Customer_Case.Description}`
- `{!$Input:Customer_Case.Case_AI_Summary_c}`
- `{!$Input:Customer_Case.Reason}`

Example

You're a Customer Service Agent and your name is `{!$Customer_Case.Contact.Name}` from Ursa Major Solar. Your recipient is `{!$Input:Customer_Case.Contact.Name}`.

You're following up with a customer to ask more about a problem with their order.

When I ask you to generate a text message, you must strictly follow my instructions below.

Instructions:

"""

Generate a text message. It must be no longer than 60 words.

Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant lang

usage.

Add the following information to the text message: `{!$Input:Customer_Case.Description} {!$Input:Customer_Case.Case_AI_Summary_c} {!$Input:Customer_Case.Reason}`

Ask the customer to confirm that this information is accurate.

End the text by offering to assist the customer now.

"""

Now generate the text message to your contact.

Generate a Newsletter

Prompt Template Type: Flex

Resource Object: Product, Product Service Campaign

This prompt template contains placeholder text for these merge fields.

- `{!$Flow:Get_Products_and_Campaigns.Prompt}`



Example

You're a sales representative from GenWatt writing a newsletter to customers about the company's current products and campaigns.

GenWatt sells widgets and your target customers are young adults with apartments. Our products are more affordable and easier to install than competitors' products.

You should get customers interested in a sample of our products and special offers from this month.

When I ask you to create the newsletter, you must strictly follow my instructions below.

Instructions:

"""

Introduce the product offerings in a newsletter no longer than ten paragraphs.

Use clear and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language. Be conversational.

Use the following product and campaign information to write the newsletter: `{!$Flow:Get_Products_and_Campaigns.Prompt}`

Do not attribute any negative traits in the summary.

End with a call to action for readers to look at our website for these offers.

"""

Now create the newsletter.

Draft an Email from an Organization's Opportunities

Prompt Template Type: Flex

Resource Object: Account

This prompt template contains placeholder text for these merge fields.

- `{!$Organization.Name}`
- `{!$Input:Account.Name}`
- `{!$RelatedList:Account.Opportunities.Records}`
- `{!$RelatedList:Account.Contacts.Records}`



Example

You are a sales representative for `{!$Organization.Name}`. You are assigned Account: `{!$Input:Account.Name}`.

Inspect all of the Opportunity records in the set `{!$RelatedList:Account.Opportunities.Records}`. Figure out which opportunity has the highest amount.

When I ask you to create an email, generate an email specific to that Opportunity. You must strictly follow my instructions below.

Instructions:

"""

Tell the customer that you are very excited to work on that opportunity and close the deal.

Suggest a telephone call with them in the very near future to determine what it will take to close the deal.

Address the email to the Contact in `{!$RelatedList:Account.Contacts.Records}` with the most senior title. Make sure you address it to the person with an

order of FirstName then LastName.

Write with a friendly and enthusiastic tone.

"""

Now, create an email for this opportunity.

E-Commerce Product Image Verification

Prompt Template Type: Flex

Resource Object: File, Product2

This prompt template contains placeholder text for these merge fields.

- `{!$Product2.Description}`



Example

You're a Product Verification Specialist reviewing product images for an e-commerce listing to ensure they accurately represent the item before it's published. Your recipient is the product manager overseeing the listing. When I ask you to generate a comparison, you must strictly follow the instructions below.

Instructions:

"""

Compare the provided product images with the description: `{!$Product2.Description}`. Ensure the images accurately represent the item being listed. Check for any discrepancies in color, size, packaging, and other visible details, and flag any image that does not match the description or appears misleading.

"""

Now, generate the comparison for your recipient.

Image Verification for Account Relevance

Prompt Template Type: Flex

Resource Object: Account

This prompt template contains placeholder text for these merge fields.

- `{!$Input:Account.Name}`
- `{!$RelatedList:Account.CombinedAttachments.Records}`



Example

You're a Business Analyst reviewing the account `{!$Input:Account.Name}`. You've received a set of images: `{!$RelatedList:Account.CombinedAttachments.Records}`.

The files and images show their services and capabilities. Explain all the files in detail, including the types of services provided, equipment repaired,

and any other relevant information. Then summarize the following details and evaluate if this company is well-suited to solve the problems based on the provided images

and descriptions. When I ask you to generate a response, provide a summary of your findings and determine whether the company aligns with the client's needs. You must strictly follow my instructions below.

Instructions:

"""

Analyze all the images and files provided, detailing the company's offerings and scope of work. Summarize the key points and assess if the company's capabilities are a good match for solving the client's specific problems. Write with a clear, concise, and professional tone.

"""

Now, generate a response based on this evaluation.

See Also

[Salesforce AI Use Case Library](#)

How Users Work with a Prompt Template

As a Salesforce administrator, you configure prompt templates to make tasks easier for your users. This section explains how your users can apply these prompt templates to write emails, generate case summaries, complete text form fields, and more.

[Give Users Access to a Prompt Template](#)

Prepare your users to harness the power of Einstein generative AI. Manage who can use prompt templates with permission sets. Add sales email prompt templates to Einstein for Sales, and add field generation prompt templates to dynamic fields in pages built with Lightning App Builder.

[Build and Manage Lightning Types for Prompt Templates](#)

Use Lightning Types to define and manage structured output schemas for prompt templates. Lightning types are reusable definitions that Prompt Builder references at run time to enforce the

response structure.

Sales Email Prompt Templates in Action

Einstein generative AI helps you draft a personalized email. Your org's custom sales email prompt templates automatically appear as options in the Lightning Experience email composer. Before you send an Einstein Sales Email, review the email draft and edit it, if needed.

Field Generation Prompt Templates in Action

With generative AI-enabled fields, you can get real-time data from across your org without leaving a Lightning page. Generative AI-enabled fields use field generation prompt templates to provide dynamic summaries, descriptions, and more.

Flex Prompt Templates in Action

Flex prompt templates are specific to your use cases, so call them wherever you need them in your org. Build custom UI or use REST API to call them with an invocable action.

Integrate Prompt Templates with Salesforce Features

You can call a prompt template through an invocable action anywhere on the Salesforce Platform or by using the Connect REST API or Connect in Apex.

Set Up Prompt Performance Metrics in Prompt Builder (Beta)

View prompt template user metrics from Data 360, and track which prompt templates perform best for your customers.

Use Structured Outputs to Format Model Responses

Structured Output in Prompt Builder ensures models return responses in a consistent JSON or HTML format, improving reliability for workflows, integrations, and UI rendering.

Give Users Access to a Prompt Template

Prepare your users to harness the power of Einstein generative AI. Manage who can use prompt templates with permission sets. Add sales email prompt templates to Einstein for Sales, and add field generation prompt templates to dynamic fields in pages built with Lightning App Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Add a Sales Email Prompt Template to Einstein Sales Emails

Get ready to add sales email prompt templates from Prompt Builder to your sales team's toolbox. Turn on Sales Emails in Setup, and then assign a permission set to your sales reps.

Add a Field Generation Prompt Template to a Lightning Record Page

Generative AI-enabled fields powered by prompt templates can help users complete their work faster. With a click of a button, your users can quickly populate a record field with useful information, such as a summary of open cases for an account, to facilitate more productive conversations with your customers.

See Also

[Enable Prompt Builder](#)

Add a Sales Email Prompt Template to Einstein Sales Emails

Get ready to add sales email prompt templates from Prompt Builder to your sales team's toolbox. Turn on Sales Emails in Setup, and then assign a permission set to your sales reps.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To access and run prompt templates outside Prompt Builder: Prompt Template User permission set

To access Sales Emails features to write emails using Einstein for Sales: Einstein Sales Emails permission set

For information about assigning Einstein for Sales permission sets, see [Set Up Sales Emails](#).

See Also

[Create a Sales Email Prompt Template](#)

Add a Field Generation Prompt Template to a Lightning Record Page

Generative AI-enabled fields powered by prompt templates can help users complete their work faster. With a click of a button, your users can quickly populate a record field with useful information, such as a summary of open cases for an account, to facilitate more productive conversations with your customers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

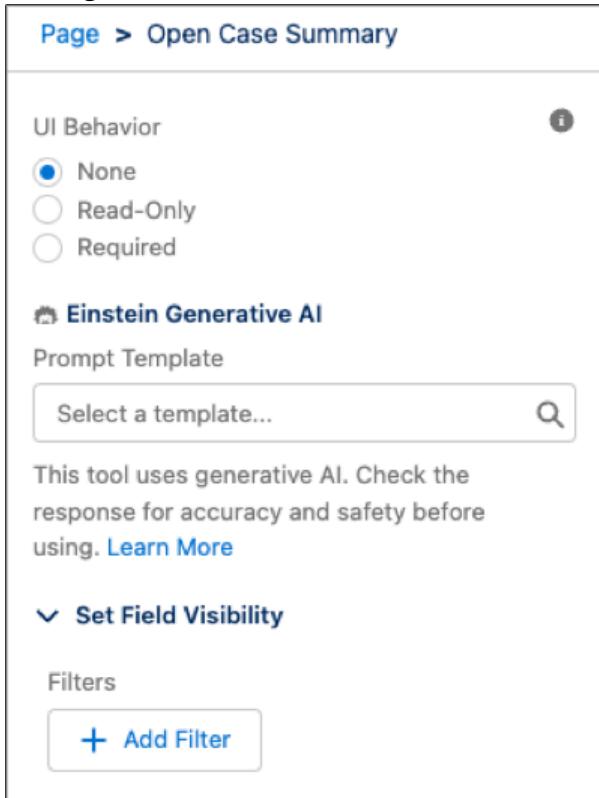
USER PERMISSIONS NEEDED

To access and run prompt templates outside Prompt Builder: Prompt Template User permission set

-  **Note** For users to access generative AI-enabled fields in the Salesforce mobile app, you must first enable [Dynamic Forms on Mobile](#).

1. From Setup, enter *App Builder* in the Quick Find box, then select **Lightning App Builder**.
2. Select an existing Lightning record page, or create a new one.
3. If you're creating a new record page, drag a Field Section component or a Record Detail component onto the canvas.
Use one of these options, but not both.
 - Click the **Fields** tab and add one or more Field Section components to build your record details and fields from scratch. Then drag fields into the Field Section component.
 - Use a Record Detail component to migrate your page to Dynamic Forms and convert the single block of fields into individual field components. Add the Record Detail component to the page, select it, then click **Upgrade Now** in the component panel.
4. If you're editing an existing record page that's not already using Dynamic Forms, click the **Record Detail** component on the canvas, then click **Upgrade Now** in the property panel.
5. Click a field on the canvas that supports field generation.
You can add a field generation prompt to writable text, text area, text area (long), and text area (rich) field types. You can't add a field generation prompt to read-only fields.

6. In the Einstein Generative AI section of the field properties, select a field generation prompt template to assign to the field.



7. Save and activate the page.

-  **Note** You must have the Manage Prompt Templates permission to successfully package Lightning

pages that reference prompt templates. Without this permission, package creation succeeds, but the prompt template isn't included in the package.

See Also

[Lightning App Builder](#)

[Break Up Your Record Details with Dynamic Forms](#)

Build and Manage Lightning Types for Prompt Templates

Use Lightning Types to define and manage structured output schemas for prompt templates. Lightning types are reusable definitions that Prompt Builder references at run time to enforce the response structure.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

[Configure the Generated Response Format](#)

Select JSON or HTML to control the format of generated responses.

[Create an Apex-Based Lightning Type](#)

Create Apex-based Lightning types when you define schemas with Apex.

[Create an Object-Based Lightning Type](#)

Create an Object-Based Lightning Type when you need a new schema for prompt template output.

Configure the Generated Response Format

Select JSON or HTML to control the format of generated responses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

1. Create a prompt template with merge fields.
2. Click **Template Settings**.
3. In the Response section, select the format for the generated response.
4. Click **Save & Preview**.

Each time you click Preview, the LLM generates a new response with the selected format.

Create an Apex-Based Lightning Type

Create Apex-based Lightning types when you define schemas with Apex.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

-
1. Create an Apex class that defines the output structure. Ensure the Apex class implements: `AICopilot.GenAIPromptTemplateOutput`.
 2. In Setup, search and select **Lightning Types**.
 3. Create a Lightning type and associate it with the existing Apex class.
 4. Click **Save**.

Apex-based Lightning types appear in Setup and used in Prompt Builder.

See Also

[Salesforce Help: Citations in Retrievers](#)

Create an Object-Based Lightning Type

Create an Object-Based Lightning Type when you need a new schema for prompt template output.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or

Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in
Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
 - Execute Prompt Templates
-

1. Open a prompt template in Prompt Builder.
2. Click **Template Settings**.
3. In **Response**, select **Lightning Type**, then click **Create New Lightning Type**.
4. In the Lightning Type window, add the label, API name, and description.
5. Click **Next**.
6. Add the output fields:
 - a. Specify the field name, description, and data type.
 - b. Select **Required** to make sure that users enter a value.
7. Click **Add Field** to include more fields.
8. Click **Save**.

The Lightning Type becomes available for selection immediately and enforces validation when the prompt template runs.

[Manage Changes to Object-Based Types](#)

You create object-based custom Lightning types in Prompt Builder to structure prompt template output. When you edit these types, you can't modify certain field properties to avoid disrupting integrations. Modifications such as renaming fields, changing data types, deleting fields, or making optional fields required can cause integrations and references to fail.

See Also

[Salesforce Help: Citations in Retrievers](#)

Manage Changes to Object-Based Types

You create object-based custom Lightning types in Prompt Builder to structure prompt template output. When you edit these types, you can't modify certain field properties to avoid disrupting integrations. Modifications such as renaming fields, changing data types, deleting fields, or making optional fields required can cause integrations and references to fail.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Breaking Changes

To protect the integrity of your schema references, you can't modify existing fields in these ways.

- **Data Type.** You can't change the data type, for example, from Text to Number, because integrations expect a specific data format.
- **Delete.** You can't delete an existing field referenced by integrations.
- **Field Name.** You can't rename an existing field because external references rely on the specific API name.
- **Required.** You can't make an existing optional field required. Making a field mandatory can break legacy data or integrations that don't provide a value for that field.

Safe Changes

You can safely make these updates without disrupting dependencies.

- **Add new fields.** You can add new fields to an existing custom Lightning type. To ensure backward compatibility, new fields default to optional with the Required checkbox disabled.
- **Make required fields optional.** You can deselect **Required** to make a field less restrictive.
- **Update descriptions.** You can modify descriptions to provide better clarity.

Sales Email Prompt Templates in Action

Einstein generative AI helps you draft a personalized email. Your org's custom sales email prompt templates automatically appear as options in the Lightning Experience email composer. Before you send an Einstein Sales Email, review the email draft and edit it, if needed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To access and run prompt templates outside
Prompt Builder

Prompt Template User permission set

To learn about drafting sales emails with Einstein, see [Draft a Sales Email with Einstein Generative AI](#).

! **Important** This tool uses generative AI, which is known to include inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for the output when shared.

 **Note** Einstein Sales Emails isn't available in the Salesforce mobile app.

Field Generation Prompt Templates in Action

With generative AI-enabled fields, you can get real-time data from across your org without leaving a Lightning page. Generative AI-enabled fields use field generation prompt templates to provide dynamic summaries, descriptions, and more.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To access and run prompt templates outside Prompt Builder	Prompt Template User permission set
--	-------------------------------------

 **Note** For users to access generative AI-enabled fields in the Salesforce mobile app, a Salesforce admin must first enable [Dynamic Forms on Mobile](#).

1. Click  on a Lightning record page form field.
2. If the form field is enabled for generative AI,  appears on the field. To generate a draft of the field, click .



If you don't see a generative AI-enabled field icon on a record field () , then a prompt template isn't supported for that field. If a custom permission set is created for Prompt Builder and field generation templates aren't visible, grant object access to prompt templates. Also, ensure the user has the permissions ExecutePromptTemplate and ManagePromptTemplate.

3. In the Einstein panel, review the draft that the AI generates.
4. To add the draft to the field, click **Use**.
5. If you're unsatisfied with the response, send a message that asks Einstein to rewrite the draft. For example, you can ask Einstein to shorten a field description. Einstein supports brief back-and-forth conversations, so if you're still unsatisfied with the regenerated draft, ask Einstein to revise the draft again.
6. After you add the draft to the field, review the field again. Edit the field, if desired.



Important This tool uses generative AI, which is known to include inaccurate or harmful

responses. Before using, review the output for accuracy and safety. You assume responsibility for the output when shared.

7. Save the updated record.

Flex Prompt Templates in Action

Flex prompt templates are specific to your use cases, so call them wherever you need them in your org. Build custom UI or use REST API to call them with an invocable action.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Because flex templates are so customizable, you can use them in almost any way you want in your org. Enabling them is specific to the use case. For example, a prompt that generates a newsletter using several Product, Campaign, and Event records belongs on a different page than a prompt that generates a text message following up on a Customer Case.

Call a Prompt as an Invocable Action

Work with your Salesforce developer to create an invocable action that calls a prompt template in your org. See [Generate a Prompt Response](#) in the Actions Developer Guide.

Use a Prompt in a Flow

Use flex prompts to automate field generation even further with flows. Unlike a field generation prompt template type, there isn't a human reviewing and editing the generated content before it populates the field, it fills automatically as instructed by the flow.

Integrate Prompt Templates with Salesforce Features

You can call a prompt template through an invocable action anywhere on the Salesforce Platform or by using the Connect REST API or Connect in Apex.

See the [Prompt Builder](#) section of the [Agentforce Developer Guide](#).

See Also

[Agentforce Developer Guide: Prompt Builder](#)

[How Users Work with a Prompt Template](#)

Set Up Prompt Performance Metrics in Prompt Builder (Beta)

View prompt template user metrics from Data 360, and track which prompt templates perform best for your customers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

USER PERMISSIONS NEEDED

To create and manage prompt templates in Prompt Builder:

Prompt Template Manager permission set

- Manage Prompt Templates
- Execute Prompt Templates

To manage Prompt Performance Metrics:

Data Cloud permission set

! **Important** Prompt Performance Metrics is scheduled for retirement in Summer '26. If you disable this feature, you can't reenable it. For more information see the [knowledge article](#).

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

See Also

- [Set Up and Maintain Data 360](#)
- [Generative AI Audit and Feedback Data](#)
- [Calculated Insights](#)

Turn on Prompt Builder Usage and Feedback Metrics

To view usage and feedback metrics, first turn on Prompt Performance Metrics.

! **Important** This feature uses Data Cloud Calculated Insights. Turning on this feature increases your credit consumption. To learn more, see [Billing Considerations for Audit and Feedback](#).

1. Before you begin, make sure that you have set up and configured Data Cloud. For Data Cloud setup instructions, see [Set Up and Maintain](#) in Salesforce Help.
2. From Setup, in the Quick Find box, enter *Einstein Audit*, and then select **Einstein Audit, Analytics, and Monitoring Setup**.

3. On the Einstein Audit, Analytics, and Monitoring setup page, verify that **Audit and Feedback** is on. If not, see [Set Up Einstein Generative AI Audit and Feedback](#).
4. Confirm that all Audit and Feedback data streams in Data Cloud are actively ingesting data.
 - a. From the App Launcher, find and select **Data Streams**.
 - b. Verify that all data streams beginning with *GenAI* show **Success** for the Last Run Status.
 - c. If a GenAI stream has a **Pending** status, wait for the status to become **Active**.
 - d. From the App Launcher, find and select **Calculated Insights**.
 - e. Verify that the listed calculated insights are created and in **Draft** status.
 - Prompt Template Feedback
 - Prompt Template Feedback Reasons
 - Prompt Template Generation Count
 - Prompt Template Version Feedback
 - Prompt Template Version Feedback Reasons
5. Turn on feedback metrics for prompt templates.
 - a. From Setup, in the Quick Find box, enter *Einstein Audit*, and then select **Einstein Audit, Analytics, and Monitoring Setup**.
 - b. Turn on **Prompt Builder Usage and Feedback Metrics (Beta)**.
6. Confirm that the Calculated Insights are active.
 - a. From the App Launcher, find and select **Calculated Insights**.
 - b. Wait for the status of all Calculated Insights to be active. This takes some time.

View Prompt Template Feedback Metrics

View feedback metrics for Prompt Templates

1. Enter *Prompt* in the Quick Find box in Setup.
 2. Select **Prompt Builder**.

The Prompt Builder list view shows:

 - the total number of times a template generates a prompt response
 - the number of thumbs-up and thumbs-down responses
-  **Note** If this information isn't available in Prompt Builder, a banner explains what's required to show it. An error appears on the Prompt Builder list view until the Calculated Insights activate.

Considerations

In earlier releases, enabling Audit and Feedback automatically activated Calculated Insights, which resulted in credit consumption even if Prompt Builder Feedback and Metrics is off.

In the current experience, Calculated Insights activate only when Prompt Builder Feedback and Metrics is on. If the Audit and Feedback feature was enabled before this change, Calculated Insights may be active in your org.

If you're not using Prompt Builder Feedback and Metrics, manually turn off these Calculated Insights to stop credit consumption:

- Prompt Template Feedback
- Prompt Template Feedback Reasons
- Prompt Template Generation Count
- Prompt Template Version Feedback
- Prompt Template Version Feedback Reasons

Use Structured Outputs to Format Model Responses

Structured Output in Prompt Builder ensures models return responses in a consistent JSON or HTML format, improving reliability for workflows, integrations, and UI rendering.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Platform, or Einstein or Agentforce for Sales or Service add-on, or Agentforce Foundations

Structured Outputs defines the format of model responses by using JSON or HTML. This feature provides structure when your workflow, integration, or UI requires consistent formatting for rendering or parsing data.

Instead of relying on user-written prompt instructions, Structured Outputs applies system-level instructions and sets metadata at the template level. This control improves reliability when working with tools like Flow or Agents.

Select the Expected Response Format

Selecting JSON applies special instructions and syntax checks to help return clean, valid JSON. When you select HTML, the system signals the model to respond by using HTML formatting. Set the format one time per template. The selection applies to every prompt sent that uses that template, giving you consistency across use cases.

Format: Default

By default, models often use Markdown for light formatting, like bold, italic, or bullet points. Earlier versions of Prompt Builder showed this formatting as raw text. The current version renders Markdown as styled output, improving readability and making responses easier to interpret. Prompt Builder uses the same rendering component as an agent, so the formatting matches what users see in a real-world situation.

Format: JSON

View JSON responses only in the raw view. Fields don't render formatted text, such as Markdown and carriage returns, `\n`, `\r`. Models performance varies when generating JSON. Thorough testing is important to increase accuracy and consistency. For the best results, select a Lightning Type to enforce the JSON schema. If you don't select a Lightning type, include an example of your JSON structure in your prompt instructions.

When by using JSON as the response format, you can optionally select a Lightning Type to enforce a predefined output schema. Lightning Types define exact fields, data types, and required values that the model returns.

Without a Lightning type, JSON responses rely on prompt instructions alone. While the system applies syntax checks to help ensure valid JSON, the structure itself varies between responses. Lightning Types remove this variability by shifting schema definition from prompt instructions to system-enforced metadata. After you select a Lightning type:

- Prompt Builder instructs the model to match the predefined schema exactly
- The model populates values instead of determining structure
- Responses are more reliable for flows, Agents, and integrations

Select a Lightning type when you consume JSON output via:

- Automation or orchestration tools
- Downstream integrations
- UI components that require consistent data structures

You can use Lightning Types in two ways:

- Object-based Lightning Types, created directly in Prompt Builder by using the Lightning Type Builder
- Apex-based Lightning Types are created in Setup by using Apex classes and reused across features

Select either Lightning Type when configuring JSON output for a prompt template.

Format: HTML

Selecting HTML configures the template to return and show structured, styled content. Prompt Builder:

- Tags the template with `format = rich text`
- Instructs the model to return HTML-formatted output
- Uses the `lightning-formatted-rich-text` Lightning Web Component to render responses

Prompt Builder uses the Lightning Web Component `lightning-formatted-rich-text` to render the response from the model.

- This component supports a subset of HTML tags and doesn't behave like a full browser.
- Prompt Builder preserves unsupported HTML tags in the model response, but doesn't render them in the view.
- All demasked data appears in the Response section. To view the mapping between the original and masked values, open the Masking Details () window in the Response section.

- Refer to the [Salesforce Component Library documentation](#) for a complete list of supported tags. Use the rich text output only within Salesforce, as it isn't optimized or validated for full rendering on external web platforms.

Einstein Generative AI Analytics

Collect and store Einstein generative AI data in Data 360. Enhance your generative AI solutions with insights gained from dashboards and reports.

[Einstein Audit and Feedback Data](#)

Collect and store Einstein generative AI audit and feedback data in Data 360 and enhance your generative AI applications with feedback analytics, prompt adjustments, and LLM tuning.

[Knowledge/RAG Quality Data and Metrics](#)

Monitor knowledge retrieval quality scores for your Agentforce and generative AI solutions in production and sandbox environments. Use built-in dashboards and reports to track run-time performance, view trends, and identify areas to improve. Retrieval Augmented Generation (RAG) quality metrics help you identify problem patterns, conduct root cause analysis, and fine-tune your RAG-powered solutions.

[Monitor and Analyze Einstein Service Replies](#)

Evaluate and track the effectiveness of Einstein Service Replies in your organization by creating custom report types that connect case and messaging session data with generative AI audit and feedback data.

Einstein Audit and Feedback Data

Collect and store Einstein generative AI audit and feedback data in Data 360 and enhance your generative AI applications with feedback analytics, prompt adjustments, and LLM tuning.

[About Generative AI Audit and Feedback Data](#)

Use generative AI audit data (also known as audit trail) to track Einstein Trust Layer functionality such as data masking and toxicity detection that help ensure the safety and accuracy of the generated response.

[Set Up Einstein Generative AI Audit and Feedback](#)

To collect Einstein generative AI audit and feedback data, turn it on in Einstein Setup.

[Data Model for Generative AI Audit and Feedback](#)

Understand and analyze your Einstein generative AI audit and feedback data using the appropriate data model objects (DMOs). Einstein generative AI audit and feedback data is streamed to a data lake object (DLO) in Data 360 and then mapped to data model objects (DMO).

[Share Insights from Einstein Generative AI Audit and Feedback Data](#)

Share insights from your Salesforce org's Einstein generative AI audit and feedback data with your team using pre-built dashboards and reports, running queries, and building Data 360 reports.

[Access Einstein Generative AI Audit and Feedback Data Reports and Dashboards](#)

Access the Einstein generative AI audit and feedback reports and dashboards directly from Data 360, after turning on the Einstein generative AI data collection and storage. You can access the Einstein generative AI and feedback data dashboard.

[Set Up Email Notifications for Specific Types of Audit and Feedback Data](#)

Use pre-built flows to automate the process of sending email notifications for specific content quality issues or user feedback thresholds or conditions. For example, you can be alerted if the percentage of toxicity in the responses is over the specified threshold.

[Billing Considerations for Audit and Feedback](#)

Generative AI audit and feedback data is stored in Data 360. When you use specific Data 360 features, it can affect your credit consumption.

[Implement Data Governance Permissions for Audit and Feedback Objects](#)

Audit and feedback data can contain sensitive information, such as personally identifying information (PII), that you want to redact or hide from unauthorized users. Use Data Cloud Data Governance to protect sensitive data by setting up dynamic data masking and field-specific data exclusion policies. You need to grant access to the impacted Data 360 objects according to an access policy.

[Manually Remove Collected Data for Audit and Feedback](#)

Suspending data collection keeps your data so that you can resume later. To remove collected data completely, however, you must manually delete certain Data 360 objects (Data Streams, DLOs, DMOs, and mappings) associated with the audit and feedback data model.

See Also

[Salesforce Blog: How to Create a Continuous Optimization Loop with Salesforce Einstein and Data Cloud](#)

About Generative AI Audit and Feedback Data

Use generative AI audit data (also known as audit trail) to track Einstein Trust Layer functionality such as data masking and toxicity detection that help ensure the safety and accuracy of the generated response.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Types of Data Collected

Data 360 collects and stores two types of data for Einstein Generative AI: generative AI audit data and feedback data.

Type	Source	Data Collected	Includes User Data
Generative AI audit data	LLM Gateway	<ul style="list-style-type: none"> • Prompt template ID and details • Request metadata and request ID • Org ID • Region and Language • Hydrated prompt text • Final PII-masked prompt text • Retrieved data • LLM response text • Final PII-unmasked response text • Response safety score • Response toxicity scores • LLM details and parameters (vendor model details and temperature) 	Yes
Feedback data	Feedback API	<ul style="list-style-type: none"> • Thumbs up and thumbs 	No

Type	Source	Data Collected	Includes User Data
		<p>down reactions and reason text</p> <ul style="list-style-type: none"> • Accept, regenerate, modify, and decline or ignore • Modified final response used 	

Data Collection and Storage in Data 360

When you turn on Einstein Generative AI and Feedback Data Collection and Storage, data is stored in the default data space of your Data 360 instance. You can access this data using Data 360 reporting and through other standard platform capabilities.

You can delete your Salesforce org's Einstein generative AI audit and feedback data at any time. Because this data is streamed to a data lake object (DLO) in Data 360, follow the steps in Remove Data Lake Objects from Data Spaces.

Data 360 refreshes the data streams once every hour.

See Also

- [Einstein Generative AI Audit and Feedback Data Model Objects](#)
- [Turn on Einstein Generative AI and Feedback Data Collection and Storage](#)
- [Audit Trail](#)

Set Up Einstein Generative AI Audit and Feedback

To collect Einstein generative AI audit and feedback data, turn it on in Einstein Setup.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To turn on data collection:

View Setup

AND

Customize Application

 **Note**

- To turn on Einstein generative AI data collection and storage, ensure that Data 360 is provisioned in your Salesforce org and that you've turned on Einstein.
- To access pre-built reports and dashboards, make sure you have Data Cloud User permissions. See [Create Data Cloud Users and Assign Permissions](#).
- If you're using a data space that is shared with your [companion org](#), make sure the initialization status for the shared data space is set to Active. See [Monitor Data Cloud Companion Connections](#) and [Data Cloud One Companion Connection Statuses](#).

1. Verify that you have the latest version of the Salesforce Standard Data Model (version 1.124 or higher) in your org (sandbox or production). From Setup, go to **Apps -> Packaging -> Installed Packages -> Salesforce Standard Data Model**. To get the required version, click [here](#) and follow the instructions.
2. From Setup, in the Quick Find box, enter *Einstein Audit*, and then select **Einstein Audit, Analytics, and Monitoring Setup**.
3. On the Einstein Audit, Analytics, and Monitoring Setup page, turn on **Audit and Feedback**.
4. For **Dataspace**, accept *default* or select a different target [data space](#) in which to store the audit and feedback data.

If you're using Data Cloud One companion connection to connect your orgs to Data Cloud, you'll only see the data spaces that are shared with your companion org.

5. [Verify](#) that the pre-built reports and dashboards are installed and available. It can take a few minutes for the installation to complete.

 **Note** After Einstein Generative AI data collection is enabled, it can take a few minutes for the reports and dashboards to become available. If for any reason the reports and dashboards are not installed after enabling data collection, the system will continue to retry the installation.

Einstein generative AI audit and feedback data collection begins once you enable data collection and storage. The collected data will appear in Data Cloud within 24 hours and will be refreshed hourly thereafter.

 **Note** Enabling AI Data Collection and Storage also activates some Calculated Insights used to measure Prompt Builder usage and feedback. If you don't plan to use Prompt Builder, you can safely deactivate them. See [Enable Prompt Performance Metrics in Prompt Builder \(Beta\)](#) for more information.

6. If you want to protect access to collected data that is sensitive, see [Implement Data Governance](#)

[Permissions for Audit and Feedback Objects.](#)

You can turn off data collection and storage at any time. When you turn off data collection and storage, the data stream collecting the data pauses. Any reports show a gap between the time you turn it off and turn it back on. To remove collected data completely, see [Manually Remove Collected Data for Audit and Feedback](#)

See Also

- [Share Insights from Einstein Generative AI Data Reports and the Audit Trail](#)
- [Set Up Einstein Generative AI](#)

Data Model for Generative AI Audit and Feedback

Understand and analyze your Einstein generative AI audit and feedback data using the appropriate data model objects (DMOs). Einstein generative AI audit and feedback data is streamed to a data lake object (DLO) in Data 360 and then mapped to data model objects (DMO).

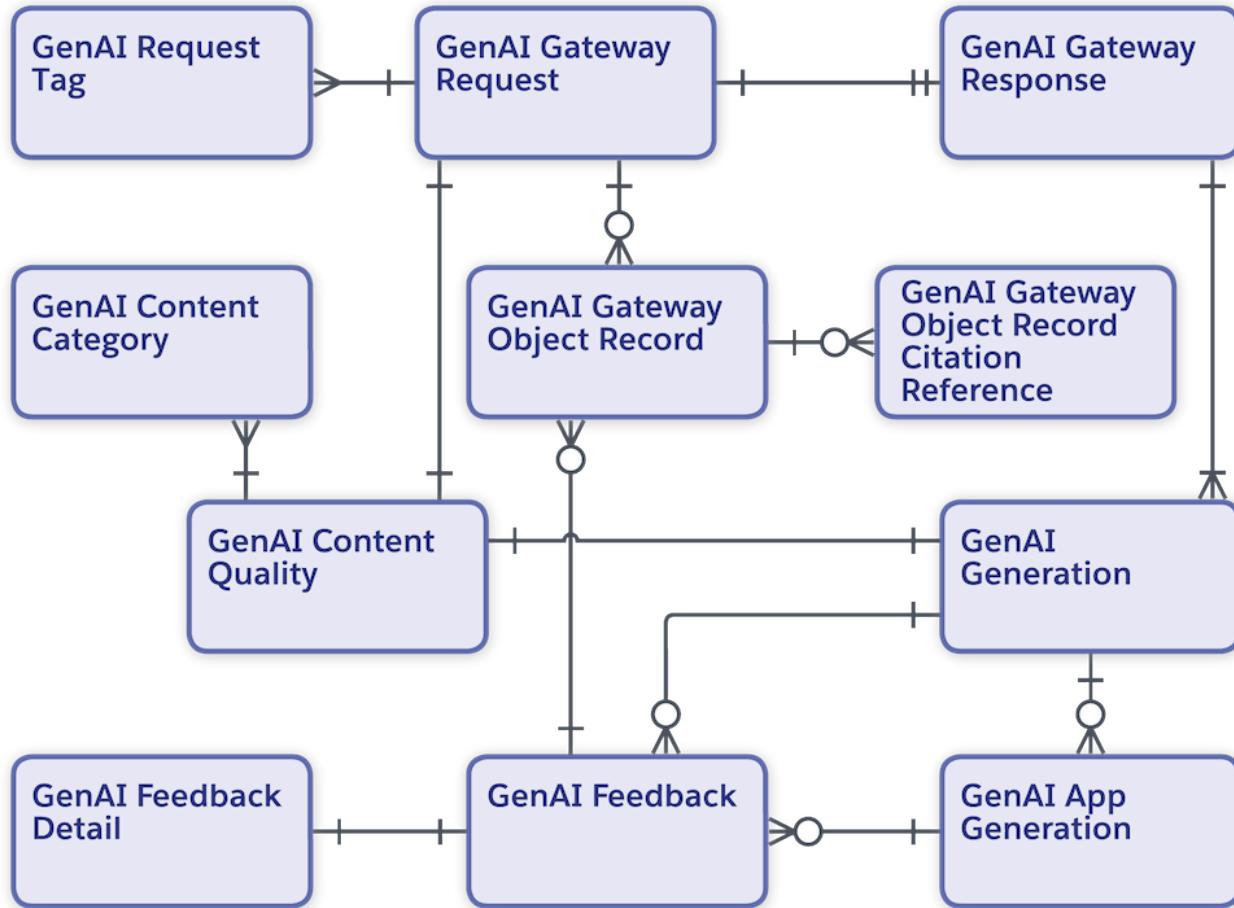
REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Generative AI Audit and Feedback FlowChart



EINSTEIN & DATA CLOUD Generative AI Audit and Feedback DMOs



Einstein Generative AI App Generation DMO

A Data 360 DMO that captures feature-specific changes made to the original generated text. The **GenAIAppGeneration** object has these attributes.

Field Label	Field API Name	Data Type	Description
Cloud	cloud_c	Text	Cost cloud ID. Example values: Service, Sales
Feature	feature_c	Text	The AI feature for which the gateway request was

Field Label	Field API Name	Data Type	Description
			made. Example values: Service Replies, Sales Summaries
Generation Id	generationId__c	Text	Foreign Key to the <code>GenAIGeneration</code> object.
Generation Update	generationUpdate__c	Text	Response text generated by apps after receiving a generation.
Generation Update Id	generationUpdateId__c	Text	Unique key submitted by app teams to identify app-specific mutations of a generation.
Id	id__c	Text	Primary key: The unique ID to the <code>GenAIAppGeneration</code> object.
Org Id	orgId__c	Text	Salesforce Org ID.
Timestamp	timestamp__c	Datetime	Timestamp of when the record was created.

Einstein Generative AI Content Category DMO

A Data 360 DMO that captures Einstein Trust Layer detector result values by detector type and sub-category. This DMO includes the safety and toxicity scores of output from the LLM. The `GenAIContentCategory` object has these attributes.

Field Label	Field API Name	Data Type	Description
Category	category__c	Text	<p>Detection category.</p> <p>Example values for <code>PII</code> category: Name, Email, Credit Card Number.</p> <p>Example values for <code>Toxicity</code> category: Hate, Violence</p> <p>Example values for Prompt Defense category: 0, 1</p> <p>Example values for <code>InstructionAdherence</code> : <code>HIGH</code> , <code>LOW</code> , <code>UNCERTAIN</code></p> <p>Example values for <code>TaskResolution</code> (Beta)</p>

Field Label	Field API Name	Data Type	Description
			Evaluation Result: <code>FULLY_RESOLVED</code> , <code>PARTIALLY_RESOLVED</code> , <code>UNRESOLVED</code>
Cloud	<code>cloud__c</code>	Text	<p>Cost cloud ID.</p> <p>Example values: Service, Sales</p>
Detector Type	<code>detectorType__c</code>	Text	<p>The type of detector.</p> <p>Example values:</p> <ul style="list-style-type: none"> <code>PII</code> <code>TOXICITY</code> <code>PROMPT_DEFENSE</code> <code>InstructionAdherence</code> <code>TaskResolution (Beta)</code>
Id	<code>id__c</code>	Text	Primary key: The unique ID to the <code>GenAIContentCategory</code> object.
Org Id	<code>orgId__c</code>	Text	Salesforce Org ID.
Parent	<code>parent__c</code>	Text	Foreign key to the <code>GenAIContentQuality</code> or <code>GenAIGeneration</code> object.
Timestamp	<code>timestamp__c</code>	Datetime	Timestamp of when the record was created.
Value	<code>value__c</code>	Text	<p>Detector value. The value depends on the detector type.</p> <p>Example values:</p> <p>When the detector type is PII and the category is email, the value indicates the number of email addresses was detected in the prompt.</p> <p>When the detector type is toxicity, and the category is hate, the value indicates the likelihood</p>

Field Label	Field API Name	Data Type	Description
			<p>of hate content in the response.</p> <p>When the detector type is <code>TaskResolution</code> (Beta), the value is the explanation text. Example: <code>User intent was to...</code></p>

Einstein Generative AI Content Quality DMO

A Data 360 DMO that captures if a request or response is safe or unsafe. The `GenAIContentQuality` object has these attributes.

Field Label	Field API Name	Data Type	Description
<code>Cloud</code>	<code>cloud__c</code>	Text	<p>Cost cloud ID.</p> <p>Example values: Service, Sales</p>
<code>Content Type</code>	<code>contentType__c</code>	Text	<p>Identifies whether the content is input (prompt) to the LLM or output (response) from the LLM.</p> <p>Values: INPUT or OUTPUT</p>
<code>Feature</code>	<code>feature__c</code>	Text	<p>The AI feature for which the gateway request was made.</p> <p>Example values: Service Replies, Sales Summaries</p>
<code>Id</code>	<code>id__c</code>	Text	<p>Primary key: The unique ID to the <code>GenAIContentQuality</code> object.</p>
<code>Is Toxicity Detected</code>	<code>isToxicityDetected__c</code>	Text	<p>Detection of toxicity in the response.</p> <p>Values: True or False</p>
<code>Org Id</code>	<code>orgId__c</code>	Text	Salesforce Org ID.
<code>Parent</code>	<code>parent__c</code>	Text	Foreign key to the <code>GenAIGatewayRequest</code> or <code>GenAIAppGeneration</code> object.
<code>Timestamp</code>	<code>timestamp__c</code>	Datetime	Timestamp of when the record was created.

Einstein Generative AI Feedback DMO

A Data 360 DMO that captures feedback for a specific generation or part of a generation. The `GenAIFeedback` object has these attributes.

Field Label	Field API Name	Data Type	Description
Action	<code>action__c</code>	Text	<p>The action taken by the user.</p> <p>Example values: generation-edit, reject, accept, thumbs-up, thumbs-down, regeneration.</p>
App Type	<code>appType__c</code>	Text	<p>The application for which the gateway request was made, also known as the <code>TargetId</code>.</p> <p>Example values: ReplyRecommendations</p>
Cloud	<code>cloud__c</code>	Text	<p>Cost cloud ID.</p> <p>Example values: Service, Sales</p>
Feature	<code>feature__c</code>	Text	<p>The AI feature for which the gateway request was made.</p> <p>Example values: Service Replies, Sales Summaries</p>
Feedback	<code>feedback__c</code>	Text	<p>Feedback</p> <p>Values: GOOD, BAD, or NULL</p> <p>The value for the feedback field can be null when the user provides a full verbatim feedback.</p>
Feedback Id	<code>feedbackId__c</code>	Text	Primary key: The unique ID of the <code>GenAIFeedback</code> object.
Generation Group Id	<code>generationGroup__c</code>	Text	The generation group ID.
Generation Id	<code>generationId__c</code>	Text	Foreign key to the <code>GenAIGeneration</code> object.
Generation Update Id	<code>generationUpdateId__c</code>	Datetime	Foreign key to the <code>GenAIAppGeneration</code> object.

Field Label	Field API Name	Data Type	Description
Org Id	orgId__c	Text	Salesforce Org ID.
Source	source__c	Text	Source of the feedback. Values: HUMAN, SYSTEM, or NOT_PROVIDED
Timestamp	timestamp__c	Datetime	Timestamp of when the record was created.
User Id	userId__c	Text	Salesforce user ID.

Einstein Generative AI Gateway Object Record DMO

A Data 360 DMO that captures the information about the Salesforce objects that are related to Generative AI requests.

Field Label	Field API Name	Data Type	Description
Cloud	cloud__c	Text	Cost cloud ID. Example values: Service, Sales
Feature	feature__c	Text	The AI feature for which the gateway request was made Example values: Service Replies, Sales Summaries
Id	id__c	Text	Primary key: The unique ID to the <code>GenAIGtwyobjRecord</code> object
Metadata	metadata__c	Text	Additional information about the source
Name	name__c	Text	Name of the Salesforce object. For citations, this is the name of the source in your org Example values: Article name, case label
Org Id	orgId__c	Text	Salesforce Org ID
Parent	parent__c	Text	Foreign key to the <code>GenAIGatewayRequest</code> object or <code>GenAIFeedback</code> object

Field Label	Field API Name	Data Type	Description
Record Id	recordid__c	Text	Record ID of the Salesforce object. For citations this is the record Id of the source int your org
Timestamp	timestamp__c	Datetime	Timestamp of when the record was created
Type	type__c	Text	<p>Type of Salesforce Object. For citations, this is the type of source</p> <p>Example Values: Knowledge article, Salesforce record, Web page</p>
Value	value__c	Text	<p>URL or links to the source</p> <p>Example Values: Links to Salesforce Objects or URLs to web pages.</p>

Einstein Generative AI Gateway Object Record Citation Reference DMO

A Data 360 DMO that captures additional information about the inline citations for the sources used to generate agent responses.

Field Label	Field API Name	Data Type	Description
Cloud	cloud__c	Text	<p>Cost cloud ID.</p> <p>Example values: Service, Sales</p>
Feature	feature__c	Text	<p>The AI feature for which the gateway request was made.</p> <p>Example values: Service Replies, Sales Summaries</p>
Id	id__c	Text	Primary key: The unique ID to the <code>GenAIGtwyObjRecord</code> object.
Org Id	orgId__c	Text	Salesforce Org ID.
Parent	parent__c	Text	Foreign key to the <code>GenAIGtwyObjRec</code> object.
References	references__c	Text	Additional Information about the citation

Field Label	Field API Name	Data Type	Description
			<p>presented in a JSON format. Includes information such as:</p> <ul style="list-style-type: none"> • Claim: Explanation of the relevance of the citation to the generated response. • Location: A list of locations where the links appear within the response.
Timestamp	timestamp_c	Datetime	Timestamp of when the record was created.

Einstein Generative AI Feedback Detail DMO

A Data 360 DMO for details of user feedback. This DMO may include sensitive user data. The GenAIFeedbackDetail object has these attributes.

Field Label	Field API Name	Data Type	Description
App Feedback	appFeedback_c	Text	<p>Mapping of key-value pairs for context on the action taken by the user. The option and the user selection is captured as key-value pairs.</p> <p>Example values: Inaccurate-True, Incomplete-True</p>
Cloud	cloud_c	Text	<p>Cost cloud ID.</p> <p>Example values: Service, Sales</p>
Feature	feature_c	Text	<p>The AI feature for which the gateway request was made.</p> <p>Example values: Service Replies, Sales Summaries</p>
Feedback Detail Id	feedbackDetailId_c	Text	<p>Primary key: The unique ID to the <code>FeedbackDetail</code> object.</p>
Feedback Text	feedbackText_c	Text	<p>The full verbatim feedback text provided by the user.</p> <p>Example value: This email did not include all the</p>

Field Label	Field API Name	Data Type	Description
			relevant information.
Org Id	orgId__c	Text	Salesforce Org ID.
Parent	parent__c	Text	Foreign key to the <code>GenAIFeedback</code> object.
Timestamp	timestamp__c	Datetime	Timestamp of when the record was created.

Einstein Generative AI Gateway Request DMO

A Data 360 DMO that captures prompt input, request parameters, and model details and parameters. This DMO may include sensitive data.. The `GenAIGatewayRequest` object has these attributes.

Field Label	Field API Name	Data Type	Description
App Type	appType__c	Text	The application for which the gateway request was made, also known as the <code>TargetID</code> . Example values: Service Replies, Sales Summaries
Bot Version Id	botVersionId__c	Text	Bots version ID.
Cloud	cloud__c	Text	Cost cloud ID. Example values: Service, Sales
Completion Tokens	completionTokens__c	Number	The number of tokens used to complete the response generation by the LLM. This metric is returned by the LLM provider. Example Values: 21, 13
Enable Input Safety Scoring	enableInputSafetyScoring__c	Text	Flag to enable or disable safety scoring for input. Values: TRUE or FALSE
Enable Output Safety Scoring	enableOutputSafetyScoring__c	Text	Flag to enable or disable safety scoring for output. Values: TRUE or FALSE

Field Label	Field API Name	Data Type	Description
Scoring			
Enable Pii Masking	enablePiiMasking__c	Text	<p>Specifies whether to mask certain types of sensitive data such as, personally identifiable information (PII).</p> <p>When set to true, data masking is enabled. When set to false, data masking is disabled.</p>
Feature	feature__c	Text	<p>The AI feature for which the gateway request was made.</p> <p>Example values: Service Replies, Sales Summaries</p>
Frequency Penalty	frequencyPenalty__c	Number	<p>Penalty to apply to repetitiveness of generated tokens. The penalty applied is determined by the value provided, and is proportional to the number of times the tokens have already appeared in the prompt or in prior generations.</p> <p>Minimum value is 0.0, and maximum value is 1.0.</p>
Gateway Request Id	gatewayRequestId__c	Text	Primary key: The unique ID to the <code>GenAIGatewayRequest</code> object.
Generation Group Id	generationGroupId__c	Text	The generation group ID.
Masked Prompt	maskedPrompt__c	Text	<p>Masked prompt or input text.</p> <p>Example: Generate an email to PERSON_0 inviting them to an event near them.</p>
Model	model__c	Text	<p>The name of the model to which the request was sent.</p> <p>Example values: gpt-35-turbo, gpt-4</p>
Num Generations	numGenerations__c	Number	<p>Number of expected generations.</p> <p>Example values: 1, 2</p>
Org Id	orgId__c	Text	Salesforce ID.

Field Label	Field API Name	Data Type	Description
Parameters	parameters_c	Text	Mapping of key-value pairs of the request parameters. Request parameters specify the user-configured settings that the LLM should use when generating a response.
Planner ID	plannerId_c	Text	Bots planner ID.
Presence Penalty	presencePenalty_c	Number	<p>Similar to Frequency Penalty, used to reduce the repetitiveness of generated tokens. However, the presence penalty is applied equally to all tokens that have already appeared regardless of how many times they have appeared.</p> <p>Minimum value is 0.0, and maximum value is 1.0.</p>
Prompt	prompt_c	Text	The hydrated version of prompt text before data masking is applied. The actual prompt sent to the LLM will mask sensitive data if data masking is enabled.
Prompt Template Dev Name	promptTemplateDevName_c	Text	The Id of the prompt template.
Prompt Template Version No	promptTemplateVersionNo_c	Text	The version of the prompt template.
Prompt Tokens	promptTokens_c	Number	The number of tokens used in the prompt.
Provider	provider_c	Text	The name of the model provider. Ex: OpenAI, AzureOpenAI.
Session Id	sessionId_c	Text	Feature-specific session ID.
Stop Sequences	stopSequences_c	Text	An array or sequence of strings. The generated text is cut at the end of the earliest occurrence of a stop sequence. Stop sequences are useful to control the length and the structure of the response.

Field Label	Field API Name	Data Type	Description
			Example: "\n" to stop the generation with a new line.
Temperature	temperature_c	Number	The temperature used for the generation. Higher values mean the model takes more risks. Lower temperatures mean that generations are less random. Minimum value is 0.0, and maximum value is 1.0.
Timestamp	timestamp_c	Datetime	Timestamp of when the record was created.
Total Tokens	totalTokens_c	Number	The total number of tokens used for the request. It is the sum of the prompt and completion tokens. Example values: 25, 35
User Id	userId_c	Text	Salesforce User ID.

Einstein Generative AI Gateway Request Tag DMO

A Data 360 DMO that captures any custom data points as key-value pairs. The GenAIGatewayRequestTag object has these attributes.

Field Label	Field API Name	Data Type	Description
Cloud	cloud_c	Text	Cost cloud ID. Example values: Service, Sales
Id	id_c	Text	Primary Key: The unique ID to the GenAIRequestTag object.
Org Id	orgId_c	Text	Salesforce Org ID.
Parent	parent_c	Text	Foreign key to the GenAIGatewayRequest object.
Tag	tag_c	Text	The tag applied to the request for more context.

Field Label	Field API Name	Data Type	Description
Tag Value	tagValue__c	Text	The request tag value. Example value: test
Timestamp	timestamp__c	Datetime	Timestamp of when the record was created.

Einstein Generative AI Gateway Response DMO

A Data 360 DMO that enables joins between the GenAIRequest DMO and GenAIGenerations DMO. The GenAIGatewayResponse object has these attributes.

Field Label	Field API Name	Data Type	Description
Cloud	cloud__c	Text	Cost cloud ID. Example values: Service, Sales
Generation Request Id	generationRequestId__c	Text	Foreign key to the GenAIGatewayRequest object.
Generation Response Id	generationResponseId__c	Text	Primary Key: The unique ID to the GenAIGatewayResponse object.
Org Id	orgId__c	Text	Salesforce Org ID.
Parameters	parameters__c	Text	Mapping of key-value pairs of the response parameters.
Timestamp	timestamp__c	Datetime	Timestamp of when the record was created.

Einstein Generative AI Generations DMO

A Data 360 DMO that captures generated responses returned for generation requests. This DMO also includes masked prompts if masking is enabled and may also include sensitive user data. The GenAIGeneration object has these attributes.

Field Label	Field API Name	Data Type	Description
Cloud	cloud__c	Text	<p>Cost cloud ID.</p> <p>Example values: Service, Sales</p>
Feature	feature__c	Text	<p>The AI feature for which the gateway request was made.</p> <p>Example values: Service Replies, Sales Summaries</p>
Generation Id	generationId__c	Text	<p>Primary Key: The unique ID to the <code>GenAIGeneration</code> object.</p>
Generation Response Id	generationResponseId__c	Text	Foreign key to the <code>AIGatewayResponse</code> object.
Masked Response Text	maskedResponseText__c	Text	<p>The generated response from the LLM. If masking is enabled, this may contain placeholder text.</p> <p>Example: Hello Person_0, we would like to invite you to an event near you.</p>
Org Id	orgId__c	Text	Salesforce Org ID.
Response Parameters	responseParameters__c	Text	Mapping of key-value pairs of the generation parameters. A response can have one or more generations.
Response Text	responseText__c	Text	<p>The generated response after demasking.</p> <p>Example: Hello John, we would like to invite you to an event near you.</p>
Timestamp	timestamp__c	Datetime	Timestamp of when the record was created.

See Also

[Data 360: Fully Qualified Keys](#)

[Model Data in Data 360](#)

[Data Governance in Data 360](#)

Share Insights from Einstein Generative AI Audit and Feedback Data

Share insights from your Salesforce org's Einstein generative AI audit and feedback data with your team using pre-built dashboards and reports, running queries, and building Data 360 reports.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Use Pre-Built Dashboards and Reports

Use the pre-built Data 360 dashboards to analyze the generative AI and share insights such as data masking, toxicity in responses, user trends, acceptance rates, and response feedback.

 **Note** When you enable the Einstein Generative AI Data Collection and Storage for the first time, it may take a few minutes before you can access the pre-built reports and dashboards. If the Einstein generative AI data collection storage is enabled but you don't see the reports and dashboards, turn [Einstein Generative AI data collection and storage](#) off and then on again.

Dashboard name	what you can do with it
Einstein Generative AI and Feedback Data	<p>Monitor the use of generative AI within your Salesforce org. Analyze user feedback, token consumption, request counts, and user engagement weekly. The dashboard provides visualizations for:</p> <ul style="list-style-type: none">• Weekly count of users engaging with generative AI features.• Weekly count of requests made to the large language model (LLM).• Total number of user feedback collected, by feature.• Weekly token usage. <p>To see more detailed information, refer to the reports linked in the charts.</p> <p>The Einstein Generative AI and Feedback Data dashboard is a standard dashboard.</p>
Einstein Trust Layer	<p>Monitor Einstein Trust Layer metrics such as data masking and toxicity. Identify any concerning patterns or trends using this dashboard. The dashboard contains visualizations for:</p> <ul style="list-style-type: none">• Data masking trends over the past 7 days, 30 days, and for all time.• Data masking trends by feature over the past 7 days, 30 days, and for all

Dashboard name	what you can do with it
	<p>time.</p> <ul style="list-style-type: none"> Trends in toxic responses categorized over the past 7 days, 30 days, and for all time. Trends in toxic responses by feature over the past 7 days, 30 days, and for all time. <p>For further details, refer to the reports linked in the charts.</p> <p>The Einstein Trust Layer dashboard is a dynamic dashboard. Because it's a dynamic dashboard, it counts toward your total number of dynamic dashboards. See Dynamic Dashboards. See Dynamic Dashboards.</p>

To see more details about toxicity in responses and data masking, use the pre-built Einstein Trust Layer Toxic Response reports.

Report name	What it provides
Toxicity Detection in Responses	A detailed view of the toxic responses detected by the Einstein Trust Layer. Use it to see the response text and the number of toxicity detection by feature.
Masked Prompt and Response	A detailed view of the prompt with the masked data, the full prompt without the masking, and the response with and without the masked data. Use it to see what data was masked before sending it to the large language model (LLM).

Get Insights Using Queries

Use queries to analyze audit and feedback data. In this example, GenAIGtwyObjRecord is used to link an SObject to GenAIGatewayRequest or GenAIFeedback. Suppose the SObject is Case. The query can get how many GenAI request were used or called for the case. You could compare the time to resolve for cases with Generative AI usage versus cases without Generative AI usage. You could also link the GenAIFeedback table to determine whether Generative AI was helpful, or just to give feedback to the Generative AI on that case.

```

SELECT *
    FROM "GenAIGtwyObjRecord__dlm"
    JOIN "GenAIFeedback__dlm" ON "GenAIGtwyObjRecord__dlm"."parent__c" =
"GenAIFeedback__dlm"."feedbackId__c"
    JOIN "GenAIGeneration__dlm" ON "GenAIFeedback__dlm"."generationId__c" =
"GenAIGeneration__dlm"."generationId__c"
    JOIN "GenAIGatewayResponse__dlm" ON "GenAIGeneration__dlm"."generation

```

```
ResponseId__c" = "GenAIGatewayResponse__dlm"."generationResponseId__c"  
    JOIN "GenAIGatewayRequest__dlm" ON "GenAIGatewayResponse__dlm"."genera  
tionRequestId__c" = "GenAIGatewayRequest__dlm"."gatewayRequestId__c"  
    LIMIT 10
```

Build Data 360 Reports

To analyze audit and feedback data, build reports in Data 360 that pull relevant information from the DMOs in the [Audit and Feedback data model](#). You can use calculated insights to create metrics that can trigger alerts. To learn more, see [Data 360 Reports and Dashboards](#).

Access Einstein Generative AI Audit and Feedback Data Reports and Dashboards

Access the Einstein generative AI audit and feedback reports and dashboards directly from Data 360, after turning on the Einstein generative AI data collection and storage. You can access the Einstein generative AI and feedback data dashboard.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To view and access reports and dashboards Data Cloud User

Ensure you have enabled Einstein Generative AI and have turned it on [Einstein Generative AI data collection and storage](#). To access pre-built reports and dashboards, make sure you have Data Cloud User permissions. See [Create Data Cloud Users and Assign Permissions](#).

1. Click **App Launcher**, and in the search field, enter *Data Cloud*.
2. To see audit and feedback dashboards, from Data Cloud, click **Dashboards**. Click **All Folders** under **FOLDERS**. In the Search all folders search box field, enter *Einstein Generative AI*.
3. To see audit and feedback reports, from Data Cloud, click **Reports**. Click **All Folders** under **FOLDERS**. In the Search all folders search box field, enter *Einstein Generative AI*.

 **Note** After Einstein Generative AI data collection is enabled, it can take a few minutes for the reports and dashboards to become available. If for any reason the reports and dashboards are not installed after enabling data collection, the system will continue to retry the installation.

Set Up Email Notifications for Specific Types of Audit and Feedback Data

Use pre-built flows to automate the process of sending email notifications for specific content quality issues or user feedback thresholds or conditions. For example, you can be alerted if the percentage of toxicity in the responses is over the specified threshold.

REQUIRED EDITIONS

The flows use the data stored in Data 360 if the generative AI audit and feedback collection is turned on.

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

To create flows:

[Manage Flows](#)

Use these steps to use a pre-built flow template and customize it to send email notifications based on your requirements.

1. From **Setup**, type *flows* and select **Flows** under **Process Automation** to launch the **Flow Builder**.
2. In the Flow Builder, click **New Flow**.
3. Select **Use a Template** and click **Next**.
4. In the left panel, select Autolaunch Flows. You'll see a list of available flow templates. Select the template you want to use and click **Create**.
See [Flow Action: Generated Content Quality and Feedback](#).
5. Set the schedule to specify the start date, time, and the frequency.
6. Modify the resources to suit your needs. Some resources to consider.
 - Use constraints to modify thresholds
 - Use formulas to calculate the conditions
 - Use text templates to edit the body of the email message



7. Click **Save**.
8. To test the flow before activating, click **Debug** and in the Debug Flow dialog box, click **Run**. Click **Continue the Debug Run**. In the debug details panel, you can review the details of each step.



9. Click **Activate** to deploy the flow.

Billing Considerations for Audit and Feedback

Generative AI audit and feedback data is stored in Data 360. When you use specific Data 360 features, it can affect your credit consumption.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

Audit and Feedback consumes Data 360 credits for ingestion, storage, and processing.

 **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](#).

Digital Wallet Card	Usage Type	Description	Notes
Data Services	Batch Data Pipeline (External Data Pipeline)	Usage is calculated based on the number of rows batch data processed by Data 360 data streams across all connectors, with the exception of structured data ingested via the Internal Data Pipeline.	<p>Audit and feedback data are ingested into Data 360 data streams, and the usage is based on the amount of data ingested.</p> <p>On average, each round trip to the large language model (LLM) and back results in 24 records being ingested into Data 360.</p> <p>The volume of data ingested is the primary contributor to the consumption of credits among the three types of usage.</p>
Data Services	Data Queries	<p>Usage is calculated based on the number of records processed.</p> <p>The count of records processed depends on the structure of a query as well as other related factors such as the total number of records in the objects being queried.</p>	<p>Data queries are used to create Data 360 reports and dashboards. Usage is calculated based on records processed.</p>
Data Services	Streaming Calculated Insights	Usage is calculated based on the number of records processed.	Calculated Insights (CIs) are used for Prompt Builder Usage and Feedback

Digital Wallet Card	Usage Type	Description	Notes
			Metrics (Beta).
Data Storage	Storage Beyond Allocation	Usage is calculated based on the amount of storage used above the amount allocated.	Usage is calculated based on the amount of storage consumed over the allocated amount.

To estimate the number of Data 360 credits, see [Multipliers in Data 360](#).

For more information on how Data 360 usage is billed, refer to your contract or contact your account executive.

See Also

[Data 360 Billable Usage Types](#)

Implement Data Governance Permissions for Audit and Feedback Objects

Audit and feedback data can contain sensitive information, such as personally identifying information (PII), that you want to redact or hide from unauthorized users. Use Data Cloud Data Governance to protect sensitive data by setting up dynamic data masking and field-specific data exclusion policies. You need to grant access to the impacted Data 360 objects according to an access policy.

Access Policy Options

You can select from either attribute-based access control (ABAC) or role-based access control (RBAC). This allows you to have more granular control over your users' access to data. Follow instructions in [Assign Data Access](#) to assign these objects to an available policy.

Impacted Data 360 Objects

For a list of impacted Data 360 objects, see [Data Model for Generative AI Audit and Feedback](#).

If you have more than one data space, you must grant access to objects in each data space. Object names in non-default data spaces follow the convention of `<DataSpace Prefix>_<Object Name>`.

Test Your Access Policies

After you've updated permissions, be sure to test user access to collected audit and feedback data.

Manually Remove Collected Data for Audit and Feedback

Suspending data collection keeps your data so that you can resume later. To remove collected data completely, however, you must manually delete certain Data 360 objects (Data Streams, DLOs, DMOs, and mappings) associated with the audit and feedback data model.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To delete Data Cloud objects:	Data Cloud admin
-------------------------------	------------------

 **Note** Before you delete these objects, make sure to turn off any features for which data is being collected.

1. Turn off data collection for Audit and Feedback.
Follow the steps in [Set Up Einstein Generative AI Audit and Feedback](#).
2. In Data Cloud, manually delete the DMOs described in [Data Model for Generative AI Audit and Feedback](#).
 - a. For each DMO, remove all field mappings and dependencies.
Follow the steps in [Edit Data Cloud Objects and Field Mappings](#) in Data Cloud Help.
 - b. After all field mappings and dependencies are removed, delete the DMO.
3. In Data Cloud, manually delete the data streams associated with Audit and Feedback. Deleting a data stream also deletes the associated DLO and its data.
Follow the steps in [Delete a Data Stream](#) in Data Cloud Help.

Knowledge/RAG Quality Data and Metrics

Monitor knowledge retrieval quality scores for your Agentforce and generative AI solutions in production and sandbox environments. Use built-in dashboards and reports to track run-time performance, view trends, and identify areas to improve. Retrieval Augmented Generation (RAG) quality metrics help you identify problem patterns, conduct root cause analysis, and fine-tune your RAG-powered solutions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Required add-on licenses vary by agent type.

[About Knowledge/RAG Quality Data and Metrics](#)

Learn about the metrics used to score retrievals. This feature collects run-time data and calculates quality scores for RAG-powered knowledge retrievals.

Set Up Knowledge/RAG Quality Data and Metrics

Turn on Knowledge/RAG Quality Data and Metrics to collect and store, in Data 360, quality scores and other run-time data about knowledge retrievals. By default, Knowledge/RAG Quality Data and Metrics is turned off.

Data Model for Knowledge/RAG Quality Data and Metrics

Use the data in these DLOs/DMOs to build reports, dashboards, and queries that provide insights into knowledge retrieval events.

Gain Insights from Knowledge/RAG Quality Data and Metrics

To analyze Knowledge/RAG Quality Data and Metrics data, you can use pre-built dashboards and reports, or you can build your own. You can also run queries on the DMOs.

Implement Data Governance Permissions for Knowledge/RAG Quality Metrics and Data Objects

Knowledge/RAG Quality Metrics and Data can contain sensitive information, such as personally identifying information (PII), that you want to redact or hide from unauthorized users. Use Data Cloud Data Governance to protect sensitive data by setting up dynamic data masking and field-specific data exclusion policies. You need to grant access to the impacted Data 360 objects according to an access policy.

Manually Remove Collected Data for Knowledge/RAG Quality Metrics

Suspending data collection keeps your data so that you can resume later. To remove collected data completely, however, you must manually delete certain objects (Data Streams, DLOs, and DMOs) associated with the Knowledge/RAG Quality Data and Metrics data model.

About Knowledge/RAG Quality Data and Metrics

Learn about the metrics used to score retrievals. This feature collects run-time data and calculates quality scores for RAG-powered knowledge retrievals.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

RAG Quality Metrics

Use quality metrics to track run-time performance, view trends, and identify areas to improve in RAG-powered solutions. RAG quality metrics help you identify problem patterns, conduct root cause analysis, and fine-tune your RAG configuration.

Metric Name	Description
Context Precision	Measures the relevance of the retrieved context, calculated based on both the question and context. What proportion of the right knowledge was found?
Faithfulness	Measures the factual consistency of the generated answer against the given context. How well did the agent use the found knowledge?
Answer Relevance	Measures how pertinent the generated answer is to the given prompt. How completely and how well is the question answered?

Common Patterns in RAG Quality Metrics

Pattern	Indication	Investigate
High Faithfulness, Low Context Relevance	<p>The answer is grounded in the retrieved context, but that context isn't relevant to the query. As a result, the answer relevance is also likely low.</p> <p>This symptom likely indicates a problem in the retrieval.</p>	<ul style="list-style-type: none"> • Does the content actually exist in the knowledge store? • Is the number of returned results sufficiently high? • Are the correct result fields selected? • Is the search string well formed? • For non-English content, is the multilingual embedding model selected?
Low Faithfulness, High-Context Relevance	<p>The answer isn't grounded in the context, even though that context is relevant to the query. Answer relevance is also likely low.</p> <p>This symptom likely indicates a problem in the LLM generation. It's possibly due to a shortcoming in prompt engineering, such as a failure of the LLM failing to give sufficiently strong instructions to follow the provided context.</p>	<ul style="list-style-type: none"> • Is the prompt template well written? • Is the LLM sufficiently capable to perform the required reasoning task? If not, select a different LLM or LLM version.
High Faithfulness and High-Context Relevance, Low-Answer Relevance	<p>The answer is grounded in the context. That context is relevant to the query. However, the answer relevance is still low.</p> <p>This symptom likely indicates that</p>	<ul style="list-style-type: none"> • Does the content actually exist in the knowledge store? • Is the number of returned results sufficiently high? • Are the right result fields selected?

Pattern	Indication	Investigate
	insufficient context was retrieved to fully answer the query. The problem is likely in the retrieval, particularly in the recall of the retrieval.	

Billing Considerations

Collecting and scoring RAG quality metrics increases your org's credit consumption rate, including LLM calls and Data 360 features. To learn more, see:

- Agentforce: [Flex Credits Billable Usage Types](#)
- Data 360: [Billing Considerations for Audit and Feedback](#)

See Also

- [About Retrieval Augmented Generation](#)
- [Troubleshooting Knowledge Retrieval for Agents](#)

Set Up Knowledge/RAG Quality Data and Metrics

Turn on Knowledge/RAG Quality Data and Metrics to collect and store, in Data 360, quality scores and other run-time data about knowledge retrievals. By default, Knowledge/RAG Quality Data and Metrics is turned off.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

USER PERMISSIONS NEEDED

To turn on data collection:	View Setup
	AND
	Customize Application

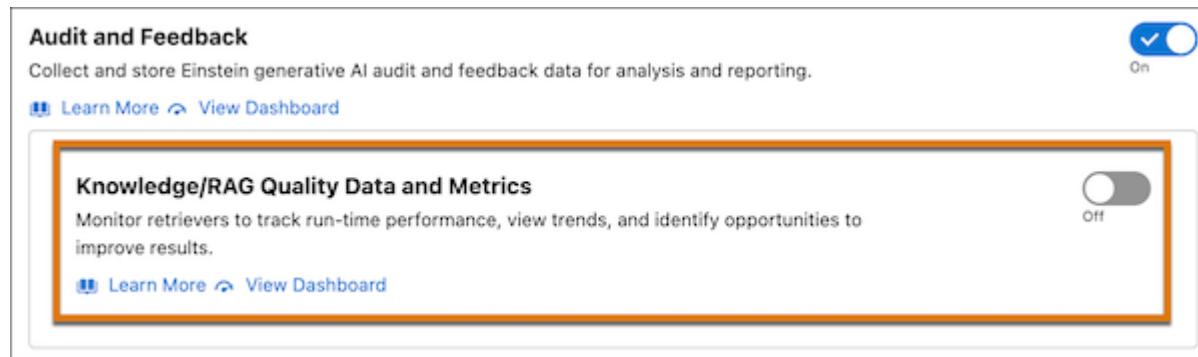
Additional considerations:

- To access pre-built reports and dashboards, make sure you have Data Cloud User permissions. See [Create Data Cloud Users and Assign Permissions](#).
- If you're using a data space that is shared with your [companion org](#), make sure the initialization status for the shared data space is set to Active. See [Data Cloud One Monitoring](#) and [Companion Connection](#)

Statuses.

1. Confirm that Data Cloud is provisioned in your Salesforce org and that you've turned on Einstein. To learn more, see [Set Up Einstein Generative AI](#).
2. Verify that you have the latest version of the Salesforce Standard Data Model (version 1.124 or higher) in your org (sandbox or production). From Setup, go to **Apps -> Packaging -> Installed Packages -> Salesforce Standard Data Model**. To get the required version, click [here](#) and follow the instructions.
3. From Setup, in the Quick Find box, enter *Einstein Audit, Analytics, and Monitoring Setup*, and then select **Einstein Audit, Analytics, and Monitoring Setup**.
4. Confirm that **Audit and Feedback** is turned on. To learn more, see [Set Up Einstein Generative AI Audit and Feedback](#).
5. Scroll down to **Knowledge/RAG Quality Data and Metrics**.

Knowledge/RAG Quality Data and Metrics opt-in toggle



6. Toggle the switch.
 - a. Turn on **Knowledge/RAG Quality Data and Metrics** to start collecting data in Data 360. Your data model is provisioned in just a few minutes. After you turn it on, data collection occurs every five minutes, data processing occurs every hour, and data reporting is aggregated daily. Note that turning on data collection increases your org's credit consumption rate, including LLM calls (see [Flex Credits Billable Usage Types](#)) and Data 360 features (see [Billing Considerations for Audit and Feedback](#)).
 - b. Turn off data collection to stop collecting data and automatically turn off any dependent features.
7. If prompted (for example, if you're turning data collection on and your org has multiple data spaces), select a target [data space](#) to store the data.
8. If you want to protect access to collected data that is sensitive, see [Implement Data Governance Permissions for Knowledge/RAG Quality Metrics and Data Objects](#).

Suspending data collection keeps your data so that you can resume later. Any reports show a gap between the time you turn it off and turn it back on. To remove collected data completely, see [Manually Remove Collected Data for Knowledge/RAG Quality Metrics](#).

Data Model for Knowledge/RAG Quality Data and Metrics

Use the data in these DLOs/DMOs to build reports, dashboards, and queries that provide insights into knowledge retrieval events.

REQUIRED EDITIONS

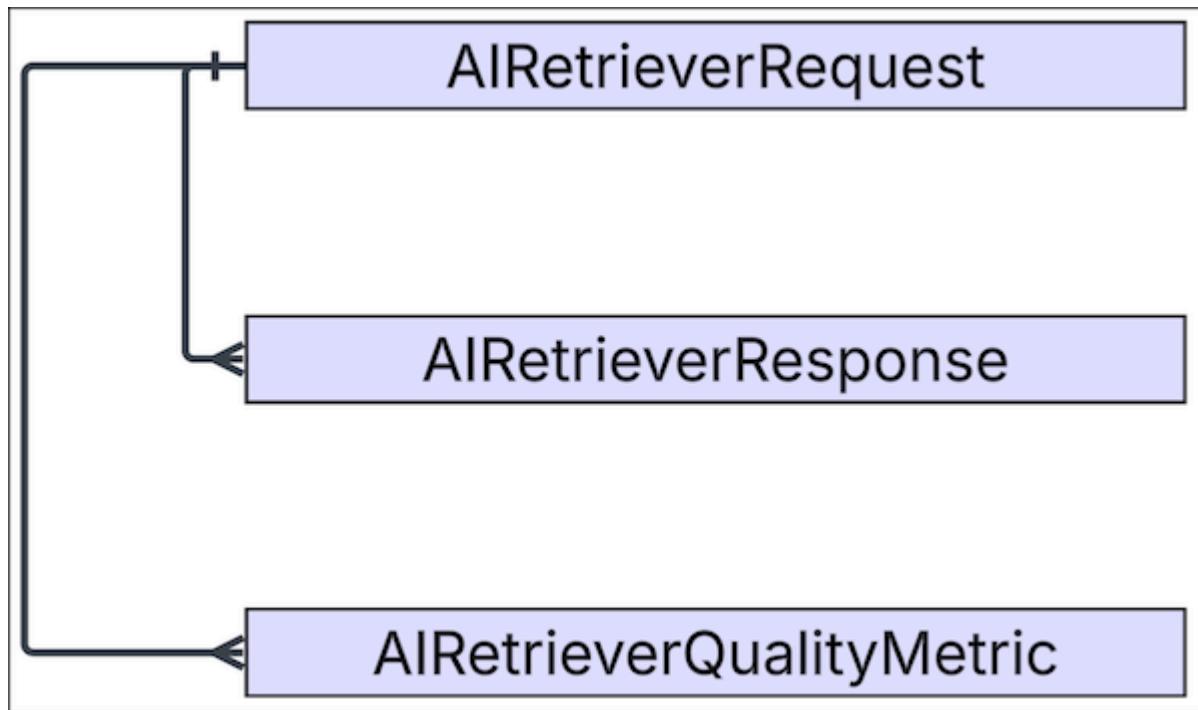
Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

About the Knowledge/RAG Quality Data and Metrics Data Model

The data model for Knowledge/RAG Quality Data and Metrics is a collection of DLOs (Data Lake Objects) and DMOs (Data Model Objects) that contain quality data and metrics.

Knowledge/RAG Quality Data and Metrics ERD



DLO/DMO	Description
AIRetrieverRequest	Represents a request to the retriever.
AIRetrieverResponse	Represents a response from the retriever.
AIRetrieverQualityMetric	Represents the quality scores derived by comparing the request and response.

Data is streamed to DLOs in Data 360 and then mapped to the applicable DMOs.

AIRetrieverRequest DLO

A Data 360 DLO that captures retriever request details. The AIRetrieverRequest object has these attributes.

Field Label	Field API Name	Data Type	Description
AI Retriever Request Id	Id	Text	Primary key. Unique identifier of the AI retriever request.
Created By	CreatedBy	Text - Reference - Id (lookup)	User who created this record.
Created Date	CreatedDate	Date - Time	Timestamp (date/time) when this record was created.
External Record Id	ExternalRecordId	Text	Corresponding record Id from an external data source system.
External Source Id	ExternalSourceId	Text	Id of an external data source system.
Feature	FeatureText	Text	Label of the feature involved in the event origin. Identifies, in the logs, which capability or functionality triggered the retriever call or is being tracked. Examples: DocumentRetrieval, KnowledgeSearch
Last Modified By	LastModifiedBy	Text - Reference - Id (lookup)	User who most recently changed this record.
Last Modified Date	LastModifiedDate	Date - Time	Timestamp (date/time) when a user most recently changed this record.
Query	QueryText	Text	User query sent to the retriever.
Request Information	RequestInfoText	Text	Additional information in the request (key-value pairs in JSON format).
Request Timestamp	RequestTimeStamp	Date - Time	Timestamp (date/time) when the retriever request occurred.
Retriever API Name	RetrieverApiName	Text	API name of the retriever associated with this request

Field Label	Field API Name	Data Type	Description
Retriever ReferenceId	RequestReferenceId	Text	Reference Id of the calling component, service, or process that sent the request to the retriever to fetch relevant information. Examples: agent, prompt, or Apex class.
SessionId	SessionId	Text	Session id of the agent that called the retriever.
Source Additional Information	SourceAdditionalInfoTxt	Text	Additional information associated with the source asset that originated this call (key-value pairs in JSON format). Example: PROMPT
Source Asset API Name	SourceAsset ApiName	Text	API name of the source asset that originated this call. Example: PROMPT
Source Asset Type	SourceAsset TypeName	Text	Type of the source asset that originated this call. Example: PROMPT
Source Asset Version	SourceAsset Version	Text	Version of the source asset that originated this call. Example: PROMPT
SpanId	SpanId	Text	Span id is generated from the component that called the retriever directly.
System Modified Stamp	SystemModstamp	Date - Time	Timestamp (date/time) when this record was last modified by a user or an automated process.
TraceId	TraceId	Text	Trace id of the agent session in which this retriever call occurred.

AIRetrieverResponse DLO

A Data 360 DLO that captures retriever response details. The AIRetrieverResponse object has these attributes.

Field Label	Field API Name	Data Type	Description
AI Retriever Response Id	Id	Text - Primary Key	Primary key. Unique identifier of the AI retriever response.
AI	AIRetriever	Text -	Foreign key reference to AIRetrieverRequestId that

Field Label	Field API Name	Data Type	Description
Retriever Request	RequestId	Reference - Id (parent)	corresponds to this retriever response.
Created By	CreatedBy	Text - Reference - Id (lookup)	User who created this record.
Created Date	CreatedDate	Date - Time	Timestamp (date/time) when this record was created.
External Record Id	ExternalRecordId	Text	Corresponding record Id from an external data source system.
External Source Id	ExternalSourceId	Text	Id of an external data source system.
Last Modified By	LastModifiedBy	Text - Reference - Id (lookup)	User who most recently changed this record.
Last Modified Date	LastModifiedDate	Date - Time	Timestamp (date/time) when a user most recently modified this record.
Response Information	xResponseInfoText	Text	Additional information in the response (key/value pairs in JSON format).
Response Timestamp	ResponseTimestamp	Date - Time	Timestamp (date/time) when this response was emitted.
Result	ResultText	Text	JSON representation of the retriever response, including chunk, SourceRecordId, and so on.
Sort Index	SortIndexNumber	Number - Integer	SortIndex of the chunks that the retriever returned.
Source Record	SourceRecordId	Text	Document reference linked to the chunk.
System Modified Stamp	SystemModstamp	Date - Time	Timestamp (date/time) when this record was most recently modified by a user or an automated process.

AIRetrieverQualityMetric DMO

A Data 360 DMO that captures retriever quality metrics details. It's used as the basis for reports,

dashboards, and queries. The `AIRetrieverQualityMetric` object has these attributes.

Field Label	Field API Name	Data Type	Description
AI Retriever Quality Metric Id	<code>Id</code>	Text	Primary key. Unique identifier associated with this metric result.
Agent Generated Response	<code>AgentGeneratedResponseText</code>	Text	Context extracted from the <code>ResponseText</code> in AI Response Generation.
AI Gateway Request	<code>CustomDMOREf_AiGatewayRequest.Id</code>	Text - Reference - Id (lookup)	Foreign key reference to the <code>GenAIGatewayRequestId</code> associated with this metric result.
AI Gateway Request Id	<code>AiGatewayRequestId</code>	Text	Reference to the <code>GenAIGatewayRequestId</code> associated with this metric result.
AI Response Generation	<code>CustomDMOREf_AiResponseGeneration.Id</code>	Text	Foreign key reference to <code>AIResponseGeneration</code> (Custom DMO <code>GenAIGeneration</code>) associated with this metric result.
AI Response Generation Id	<code>AiResponseGenerationId</code>	Text	Reference to <code>AIResponseGeneration</code> associated with this metric result.
AI Retriever Request	<code>CustomDMOREf_AiRetrieverRequest.Id</code>	Text	Foreign key reference to <code>AIRetrieverRequestId</code> associated with this metric result
AI Retriever Request Id	<code>AI Retriever Request Id</code>	Text	Reference to <code>AIRetrieverRequestId</code> associated with this metric result.
Answer Relevancy Score	<code>AnswerRelevancyScoreNumber</code>	Number - Decimal	Answer Relevancy Score. How completely and how well is the question answered?
Context Precision Score	<code>ContextPrecisionScoreNumber</code>	Number - Decimal	Context Precision Score. What proportion of the right knowledge was found?
Created By	<code>CreatedBy</code>	Text - Reference - Id	User who created the record.

Field Label	Field API Name	Data Type	Description
		(lookup)	
Created Date	CreatedDate	Date - Time	Timestamp (date/time) when this record was created.
External Record Id	ExternalRecordId	Text	Corresponding record Id from an external data source system.
External Source Id	ExternalSourceId	Text	Id of an external data source system.
Faithfulness Relevancy Score	FaithfulnessRelevancyScoreNumber	Number - Decimal	Faithfulness Relevancy Score. How well did the Agent use the found knowledge?
Last Modified By	LastModifiedById	Text - Reference - Id (lookup)	User who most recently changed this record.
Last Modified Date	LastModifiedDate	Date - Time	Timestamp (date/time) when a user most recently changed this record.
Last Processed Request Timestamp	LastProcessedReqTimestamp	Date - Time	Timestamp (date/time) of the AIRetrieverRequest that was last processed for metric evaluation.
Metric Created Timestamp	MetricCreatedAtTimestamp	Date - Time	Timestamp (date/time) when the metric result was generated.
Retrieved Context Id List	RetrievedContextIdListText	Text	List of context Ids (Top-K) extracted from ResultText in the retriever response. Used for reporting.
Retriever Api Name	RetrieverApiName	Text	API name of the retriever associated with this request.
Retriever Trace Id	RetrieverTraceId	Text	Trace Id (for example, from OTel) that was generated during the retriever request.
Retriever Trace Span Id	RetrieverTraceSpanId	Text	Trace Span Id (for example, from OTel) that was generated during the retriever request. Reference to Telemetry Trace DMO.

Field Label	Field API Name	Data Type	Description
Source Document Id List	SourceDocumentIdListText	Text	List of Source Record Ids from the retriever response. Used for reporting.
System Modified Stamp	SystemModifiedStamp	Date - Time	Timestamp (date/time) when this record was last modified by a user or an automated process.
UserUtterance	UserUtteranceText	Text	Context extracted from the user utterance in the retriever request. Used for reporting.

Gain Insights from Knowledge/RAG Quality Data and Metrics

To analyze Knowledge/RAG Quality Data and Metrics data, you can use pre-built dashboards and reports, or you can build your own. You can also run queries on the DMOs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To view and access reports and dashboards	Data Cloud User
---	-----------------

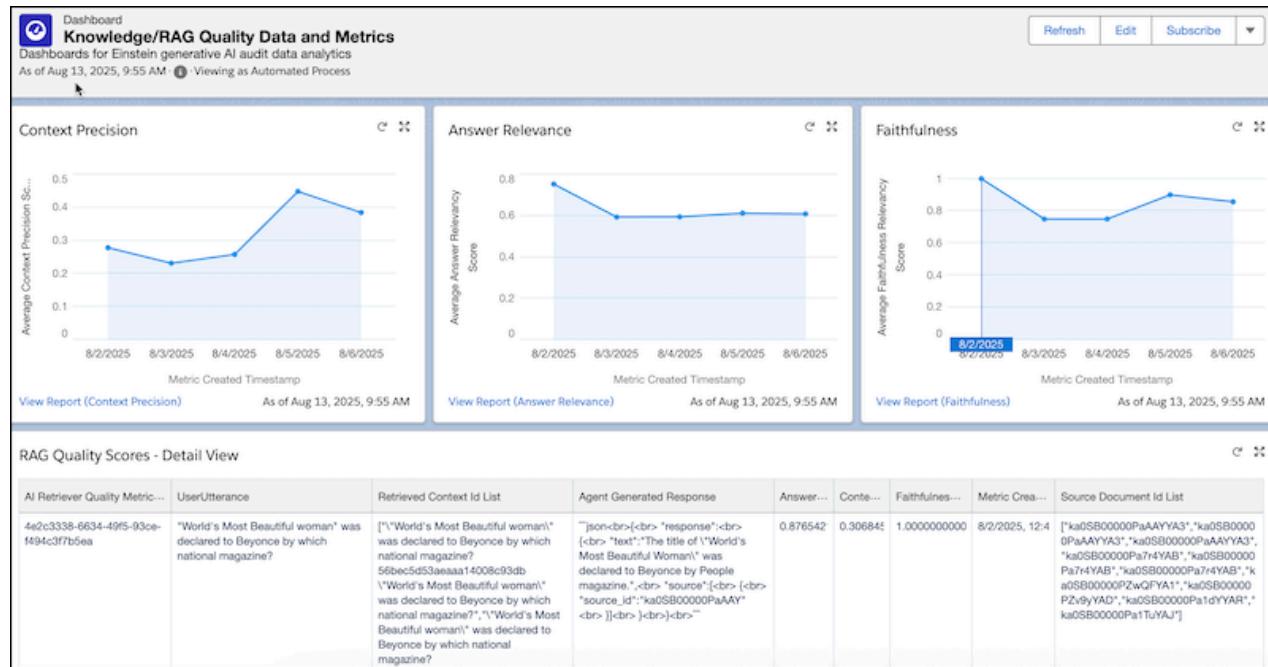
To access pre-built reports and dashboards, make sure you have Data Cloud User permissions. See [Create Data Cloud Users and Assign Permissions](#).

Use the Built-in Dashboard

Monitor quality scores and run-time activity in the built-in dashboard for Knowledge/RAG Quality Data and Metrics.

1. Click **App Launcher**, and in the search field, enter *Data Cloud*.
2. To see the dashboard, from Data Cloud, click **Dashboards**.
3. Click **All Folders** under FOLDERS.
4. In the Folders column, click a link to the *Knowledge/RAG Quality* folder.
5. Select the **Knowledge/RAG Quality Data and Metrics** dashboard.

Dashboard for Knowledge/RAG Quality Data and Metrics



Use the Built-in Reports

Monitor quality scores and run-time activity using the built-in reports for Knowledge/RAG Quality Data and Metrics. You can launch a report from the dashboard, or you can follow these instructions.

1. Click **App Launcher**, and in the search field, enter *Data Cloud*.
2. To see reports, from Data Cloud, click **Reports**.
3. Click **All Folders** under FOLDERS.
4. In the Folders column, click a link to the *Knowledge/RAG Quality* folder.
5. Select a report.

Report for Knowledge/RAG Quality Data and Metrics

The Reports interface shows the following table of reports:

Reports		All Folders > Knowledge/RAG Quality Data and Metrics		
		Name	Description	Folder
REPORTS	Recent	Context Precision	Context precision of evaluations by Gen AI features	Knowledge/RAG Quality Data and Metrics
	Created by Me	Answer Relevance	Answer relevance of evaluations by Gen AI features	Knowledge/RAG Quality Data and Metrics
	Private Reports	Faithfulness	Faithfulness of evaluations by Gen AI features	Knowledge/RAG Quality Data and Metrics
	Public Reports	RAG Quality Scores - Detail View	Drill-down of all RAG Quality Scores	Knowledge/RAG Quality Data and Metrics

To analyze Knowledge/RAG Quality Data and Metrics, you can also build custom reports in Data 360 that pull relevant information from the DMOs in the [Data Model for Knowledge/RAG Quality Data and Metrics](#). To learn more, see [Data 360 Reports and Dashboards](#).

Query the Data Model

You can run ad-hoc queries on the DMOs in the Knowledge/RAG Quality Data and Metrics data model.

Write ad hoc queries that pull relevant information from the DMOs in the [Data Model for Knowledge/RAG Quality Data and Metrics](#). To learn more, see [Query Data in Data 360](#).

Here's an example query:

```
SELECT "AgentGeneratedResponseText__c",
       "AiGatewayRequestId__c",
       "AiResponseGenerationId__c",
       "AiRetrieverRequestId__c",
       "AnswerRelevancyScoreNumber__c",
       "ContextPrecisionScoreNumber__c",
       "CreatedById__c",
       "CreatedDate__c",
       "DataSourceObject__c",
       "DataSource__c",
       "ExternalRecordId__c",
       "ExternalSourceId__c",
       "FaithfulnessRelevancyScoreNumber__c",
       "InternalOrganization__c",
       "KQ_id__c",
       "LastModifiedById__c",
       "LastModifiedDate__c",
       "LastProcessedReqTimestamp__c",
       "RetrievedContextIdListText__c",
       "RetrieverApiName__c",
       "RetrieverTraceId__c",
       "RetrieverTraceSpanId__c",
       "SourceDocumentIdListText__c",
       "SystemModstamp__c",
       "UserUtteranceText__c",
       "cdp_sys_PartitionDate__c",
       "cdp_sys_SourceVersion__c",
       "id__c",
       "metricCreatedTimestamp__c",
       "orgId__c"
  FROM "AiRetrieverQualityMetric__dl1"
 LIMIT 10
```

Join Knowledge/RAG Quality Data with Session Tracing Data

These examples show how to join Knowledge/RAG Quality data with data in the Session Tracing Data Model (STDM).

Example with Query Editor

```
SELECT * FROM "ssot_AiAgentInteraction_dlm"
    INNER JOIN "ssot_AiRetrieverQualityMetric_dlm" ON "ssot_AiAgentInteraction_dlm"."ssot_attributetext_c" LIKE CONCAT('%','ssot_AiRetrieverQualityMetric_dlm"."ssot_RetrieverTraceId_c','%') AND "ssot_AiAgentInteractionType_c"='TURN'
        INNER JOIN "ssot_AiAgentInteractionMessage_dlm" ON "ssot_AiAgentInteractionMessage_dlm"."ssot_AiAgentInteractionId_c" = "ssot_AiAgentInteraction_dlm"."ssot_Id_c" AND "ssot_AiAgentInteractionMessageType_c"='Input'
            INNER JOIN "ssot_AiAgentSessionParticipant_dlm" ON "ssot_AiAgentSessionParticipant_dlm"."ssot_Id_c" = "ssot_AiAgentInteractionMessage_dlm"."ssot_AiAgentSessionParticipantId_c" AND "ssot_AiAgentSessionParticipantRole_c"='USER'
                INNER JOIN "ssot_AiAgentInteractionStep_dlm" ON
                    "ssot_AiAgentInteractionStep_dlm"."ssot_AiAgentInteractionId_c"="ssot_AiAgentInteraction_dlm"."ssot_Id_c" AND "ssot_AiAgentInteractionStepType_c"='ACTION_STEP'
```

Example Using the Data 360 Semantic Data Model (SDM)

```
SELECT * FROM "ssot_AiAgentInteraction_dlm"
    JOIN "ssot_AiRetrieverQualityMetric_dlm" ON "ssot_TelemetryTraceId_c"="ssot_RetrieverTraceId_c"
```

Build Data 360 Reports

To analyze Knowledge/RAG Quality Data and Metrics, build reports in Data 360 that pull relevant information from the `AiRetrieverQualityMetric` DMO. You can use calculated insights to create metrics that can trigger alerts. To learn more, see [Data 360 Reports and Dashboards](#).

Implement Data Governance Permissions for Knowledge/RAG Quality Metrics and Data Objects

Knowledge/RAG Quality Metrics and Data can contain sensitive information, such as personally identifying information (PII), that you want to redact or hide from unauthorized users. Use Data Cloud Data Governance to protect sensitive data by setting up dynamic data masking and field-specific data

exclusion policies. You need to grant access to the impacted Data 360 objects according to an access policy.

Access Policy Options

You can select from either attribute-based access control (ABAC) or role-based access control (RBAC). This allows you to have more granular control over your users' access to data. Follow instructions in [Assign Data Access](#) to assign these objects to an available policy.

Impacted Data 360 Objects

For a list of impacted Data 360 objects, see [Data Model for Knowledge/RAG Quality Data and Metrics](#).

If you have more than one data space, you must grant access to objects in each data space. Object names in non-default data spaces follow the convention of `<DataSpace Prefix>_<Object Name>`.

Test Your Access Policies

After you've updated permissions, be sure to test user access to collected data for Knowledge/RAG Quality Metrics and Data.

See Also

[Data Governance in Data 360](#)

Manually Remove Collected Data for Knowledge/RAG Quality Metrics

Suspending data collection keeps your data so that you can resume later. To remove collected data completely, however, you must manually delete certain objects (Data Streams, DLOs, and DMOs) associated with the Knowledge/RAG Quality Data and Metrics data model.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

USER PERMISSIONS NEEDED

To delete Data Cloud objects: Data Cloud admin

1. Turn off data collection for Knowledge/RAG Quality Data and Metrics. Follow the steps in [Set Up Knowledge/RAG Quality Data and Metrics](#).
2. In Data Cloud, manually delete the AIRetrieverQualityMetric DMO described in [Data Model for Knowledge/RAG Quality Data and Metrics](#).

- a. Remove all field mappings and any dependencies. Follow the steps in [Edit Data Cloud Objects and Field Mappings](#) in Data Cloud Help.
 - b. After all field mappings and dependencies are removed, manually delete the DMO.
3. In Data Cloud, manually delete the AiRetrieverQualityMetric DLO. Follow the steps in [Remove Data Lake Objects from Data Spaces](#).
 4. In Data Cloud, manually delete the data streams associated with Knowledge/RAG Quality Data and Metrics (AiAgentInteraction, AIRetrieverRequest, and AIRetrieverResponse). Follow the steps in [Delete a Data Stream](#). Deleting a data stream also deletes the associated DLO and its data.

Monitor and Analyze Einstein Service Replies

Evaluate and track the effectiveness of Einstein Service Replies in your organization by creating custom report types that connect case and messaging session data with generative AI audit and feedback data.

Products or Features	<ul style="list-style-type: none">• Data 360• Service Cloud• Einstein Generative AI• Einstein Generative AI Feedback
Roles and Permissions	<ul style="list-style-type: none">• Data Cloud Admin permission set OR Data Aware Specialist permission set• View Setup and Customize Application

Two key metrics that can provide valuable insights:

- Monitoring the frequency of AI-generated responses per case helps evaluate system usage and direction. High volumes may indicate strong adoption or complex issues needing multiple AI interactions. Low counts might suggest limited use or preference for human intervention. Analyzing these patterns informs necessary adjustments and improvements.
- Analyzing user feedback, positive and negative, is crucial for determining the effectiveness of AI-generated replies and identifying areas for refinement. Positive feedback highlights successful AI interactions.

To report and analyze generative AI activity on Service Reply use cases that are related to case information, connect the case information and the associated messaging sessions with the generative AI data.

Case and messaging session information are stored in Salesforce CRM objects.

- Cases are records that are used to track and resolve customer issues. Case records contain information about the case progress and its associated records and can be accessed through Case object.
- [Enhanced Chat](#) is one of the channels used in Service Cloud to provide your customers with a personalized messaging experience from your mobile app or website to the Service Console. The

messaging session object includes information about the messages exchanged. If you are still using legacy [Salesforce Chat](#), you'll be working with the live chat transcript object.

- [Generative AI audit and feedback data](#) is stored in Data 360 DMOs.

Here's a diagram that illustrates the components of this solution and the connections between them.



Let's review the steps required to implement this solution.

[Create Data Streams to Monitor Einstein Service Replies](#)

Create data streams to bring the case and message data stored in Salesforce CRM objects into Data 360.

[Link Case and Messaging DMOs to Generative AI Data](#)

Create relationships between your custom data model objects (DMOs) and the generative AI data model objects (DMOs).

[Create Custom Reports to Monitor Generative AI Requests for Service Replies](#)

Create a custom report type and custom report to monitor the number of generative AI requests made for a specific case and its current status.

[Create Custom Reports to Monitor User Feedback for Service Replies](#)

Create a custom report type and custom report monitor the user feedback and analyze the performance of service replies while handling cases.

Create Data Streams to Monitor Einstein Service Replies

Create data streams to bring the case and message data stored in Salesforce CRM objects into Data 360.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To edit a data stream Customer Data Cloud Admin or Customer Data Cloud for Marketing Data Aware Specialist

To turn on data collection: View Setup

AND

Customize Application

To collect generative AI audit and feedback data, [Set Up Einstein Generative AI Audit and Feedback](#).

Creating data streams to bring the case and message data into Data 360 is one of the steps required to

create reports so you can analyze and monitor Einstein Service Replies. See [Monitor and Analyze Einstein Service Replies](#).

1. In Data Cloud, go to the Data Streams tab and click **New**.
2. For the data source, select Salesforce CRM and click **Next**.
3. Select a Salesforce org. If you have only one Salesforce org connected to Data Cloud, it's selected by default.
4. Select All Objects and click **Next**.
5. Select Case and click **Next**.
6. Select the fields that you want to include, and click **Next**. Make sure to select **Id**, System Modstamp.
7. For Category, select **Engagement**.
8. For Event Time Field, select **System Modstamp** and click **Next**.
9. Name the data stream Case Information, select the data space, and click **Deploy**.
10. On the data stream page, click **Start** in the data mapping section.
11. Click Select Object and select **Custom Data Model**.
12. Click **New Custom Object** and click **Save**.
13. Repeat these steps for the Messaging Session or the Live Chat Transcript object. If you use both Messaging for In-app and Salesforce Chat, repeat the steps for both objects.

You now map the fields in the data stream to create a custom data model. See [Link Case and Messaging DMOs to Generative AI Data](#).

Link Case and Messaging DMOs to Generative AI Data

Create relationships between your custom data model objects (DMOs) and the generative AI data model objects (DMOs).

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To create data model object relationships: Customer Data Cloud Admin

To turn on data collection: View Setup

AND

Customize Application

To collect generative AI audit and feedback data, [Set Up Einstein Generative AI Audit and Feedback](#).

Before you create the relationships make sure you've created the data streams for the Case and Messaging objects. See [Create Data Streams to Monitor Einstein Service Replies](#).

Mapping the case and messaging DMOs to generative AI data is one of the steps required to create reports so you can analyze and monitor Einstein Service Replies. See [Monitor and Analyze Einstein Service Replies](#).

1. In Data Cloud, select the Case DMO that you created.
2. On the Relationships tab, click **New** and enter these values.
 - Field: CaseID
 - Cardinality: 1:1
 - Related Object: MessagingSession or Live Chat Transcript object If you use both Messegng for In-app and Salesforce Chat, repeat the steps for both objects. complete the steps for both objects.
 - Related Field: CaseID
3. Save your work and activate the relationship.
4. Select the Messaging Session DMO that you created, and on the Relationships tab, click **New** and enter these values.
 - Field: Messaging Session ID
 - Cardinality: 1:1
 - Related Object: GenAIGtwyObjRecord
 - Related Field: RecordId
5. Select the Live Chat Transcript DMO that you created , and on the Relationships tab, click New and enter these values.
 - Field: Id
 - Cardinality: 1:1
 - Related Object: GenAIGtwyObjRecord
 - Related Field: RecordId
6. Save your work and activate the relationship.
7. On the Relationships tab of the GenAIGatewayRequest DMO, verify the relationship between GenAIGatewayRequest and GenAIGtwyObjRecord. You can view the status of a relationship in the Edit Relationships window.
8. On the Relationships tab of the GenAIFeedback DMO, verify the relationship between GenAIFeedback and GenAIGtwyObjRecord. You can view the status of a relationship in the Edit Relationships window.

You can now create custom report types . See [Create Custom Reports to Monitor Generative AI Requests for Service Replies](#) and [Create Custom Reports to Monitor User Feedback for Service Replies](#)

Create Custom Reports to Monitor Generative AI Requests for Service Replies

Create a custom report type and custom report to monitor the number of generative AI requests made for a specific case and its current status.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons,

contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To create custom reports: Create and Customize Reports

AND

Manage Custom Report Types

To turn on data collection: View Setup

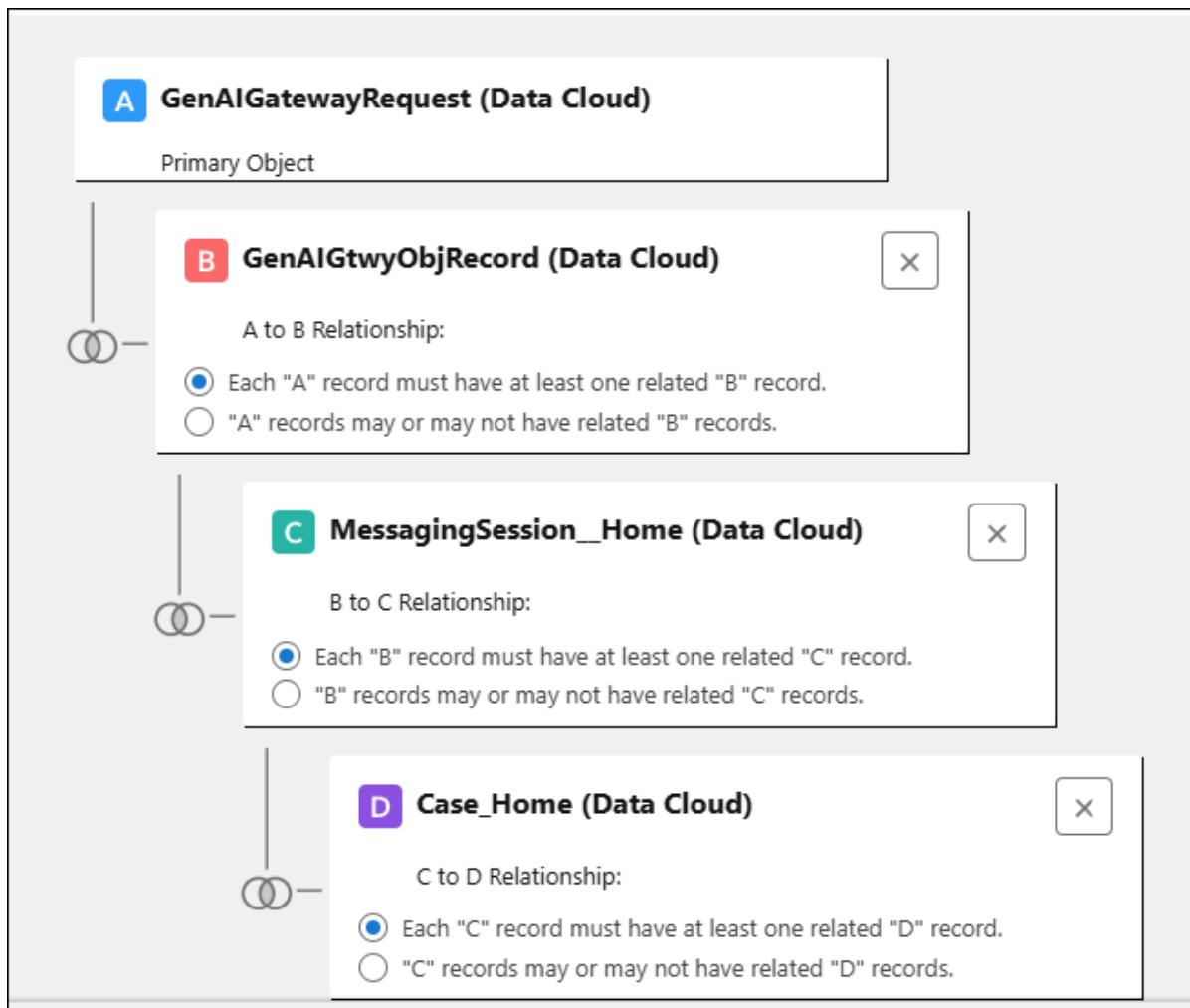
AND

Customize Application

To collect generative AI audit and feedback data, [Set Up Einstein Generative AI Audit and Feedback](#).

Before you create the custom report types make sure you've created the relationships for the Case and Messaging objects. See [Link Case and Messaging DMOs to Generative AI Data](#).

1. From Setup, in the Quick Find box, enter Report Types, and then select **Continue**.
2. Click New Custom Report Type.
 - For the primary object, select **GenAIGatewayRequest**.
 - Enter a label name, API name, and an optional description.
 - For the category, select **Data Cloud**, and then click **Next**.
3. Define the relationship between the related objects.
 - For GenAIGtwyObjRecord, create an A to B relationship, which means that each A record must have at least one related B record.
 - For Messaging Session or Live Chat Transcript (or both if you're using both Messeging for In-app and Salesforce Chat), create a B to C relationship, which means that each B record must have at least one related C record.
 - For Case, create a C to D relationship, which means that each C record must have at least one related D record.



- Save your changes.
- Now, from the App Launcher, find, and select Reports.
- Click **New Report** and for the category select **Data Cloud**.
- Choose the report type that you created, then click Start Report.
- Add or remove fields, group by rows and columns, filter report data, or add a chart. Customize your report until it shows exactly the data that you need.
- Click Save, and give your report a name and description. With access and sharing in mind, save the report in an appropriate folder. Now you and your users can use this report to analyze and monitor the number of generative AI requests made for a specific case and its current status.

- Example** The case duration report shows the case duration with the number of Generative AI requests made and its current status.



Create Custom Reports to Monitor User Feedback for Service Replies

Create a custom report type and custom report monitor the user feedback and analyze the performance of service replies while handling cases.

REQUIRED EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase add-ons, contact your Salesforce account executive.

USER PERMISSIONS NEEDED

To create custom reports: Create and Customize Reports

AND

Manage Custom Report Types

To turn on data collection: View Setup

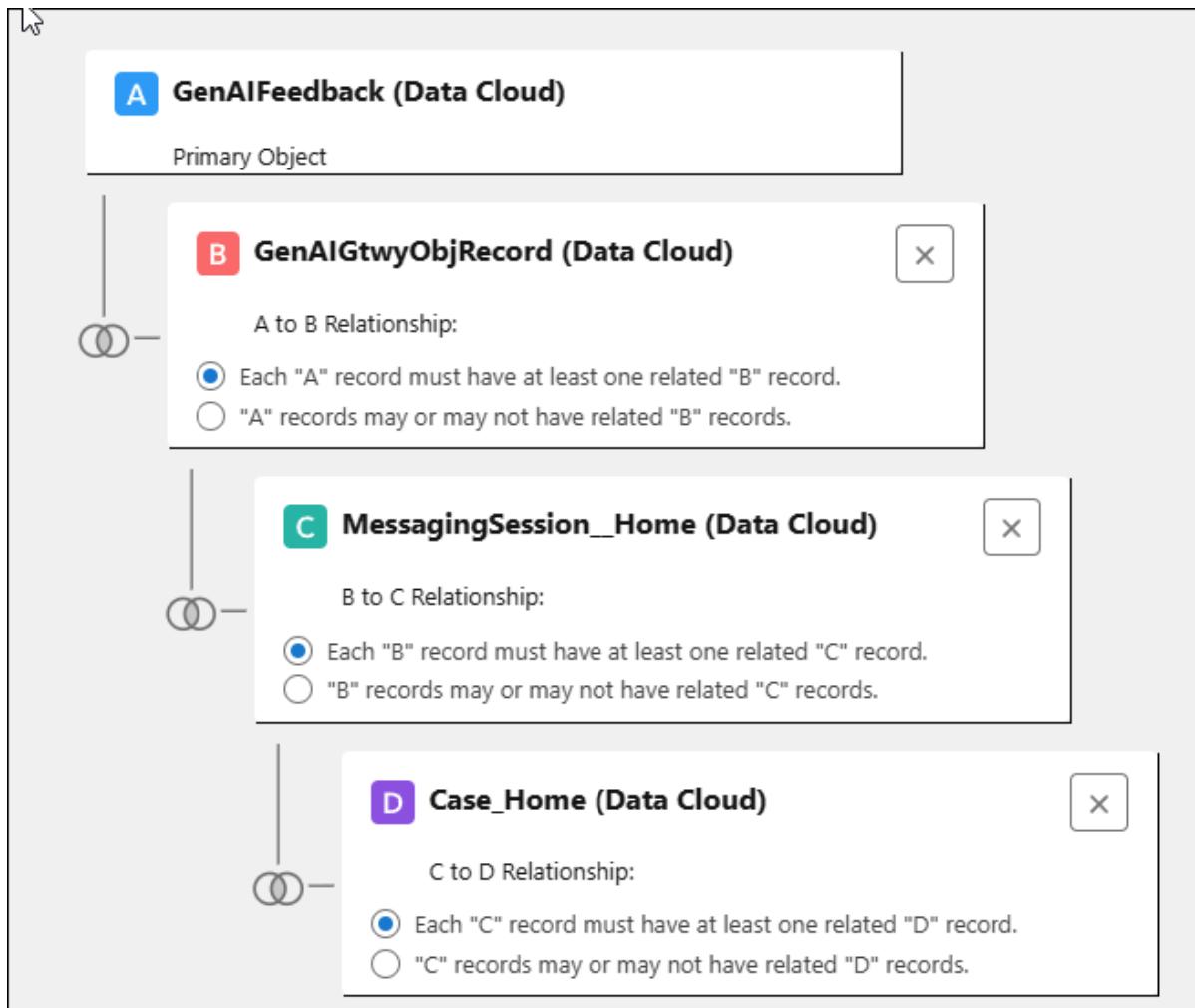
AND

Customize Application

To collect generative AI audit and feedback data, [Set Up Einstein Generative AI Audit and Feedback](#).

Before you create the custom report types make sure you've created the relationships for the Case and Messaging objects. See [Link Case and Messaging DMOs to Generative AI Data](#).

1. From Setup, in the Quick Find box, enter Report Types, and then select Continue.
2. Click **New Custom Report Type**.
 - For the primary object, select GenAIFeedback.
 - Enter a label name, api name, and a description.
 - For the category, select **Data Cloud**, and then click **Next**.
3. Define the relationship between the related objects.
 - For GenAIGtwyObjRecord, create A to B Relationship, which means that each A record must have at least one related B record.
 - For Messaging Session or Live Chat Transcript (or both if you're using both Messeging for In-app and Salesforce Chat), create a B to C relationship, which means that each B record must have at least one related C record.
 - For Case, create a C to D relationship, which means that each C record must have at least one related D record.



- Save your changes.
- Now, from the App Launcher, find, and select Reports.
- Click **New Report** and for the category select **Data Cloud**.
- Choose the report type that you created, then click Start Report.
- Add or remove fields, group by rows and columns, filter report data, or add a chart. Customize your report until it shows exactly the data that you need.
- Click Save, and give your report a name and description. With access and sharing in mind, save the report in an appropriate folder. Now you and your users can use this report to analyze and monitor the user feedback on the AI responses.

Note Currently, it's not possible to identify if a user actually used the generated response.

- Example** The case with feedback count report shows the user feedback received for the generated responses related to the case and the action taken by the user on the response. In the action column, generation-edit, means that a human user manually edited the generated response. Shown means the generated response was displayed. Accepted means that the generated response was used as is.

Agentforce Grid (Beta)

Agentforce Grid is a powerful spreadsheet-like tool for testing AI solutions quickly within Salesforce. You can use it to try out and improve AI ideas by using Salesforce data, AI tools, and platform actions to build new workflows.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. Required add-on licenses vary by agent type.

 **Note** *Grid is a beta service that is subject to the Beta Services Terms at [Agreements - Salesforce.com](#) or your written Unified Pilot Agreement, and applicable terms in the [Product Terms Directory](#). Use of this beta service consumes usage types per the [Agentforce and Generative AI Usage and Billing documentation](#) and is at the Customer's sole discretion.*

Columns are the central component for accomplishing tasks within the worksheet. Grid uses two types of columns: data columns and action columns. The first step in setting up a grid is to add a data column. You can bring in Salesforce CRM data, Data 360 data, have AI create data, or upload your own data in a CSV file.

You use action columns to perform dynamic operations. The AI column creates inline prompts for large language models (LLMs) to generate new content, summarize data, or extract specific information related to other content in the row. The Agent column enables you to bring in an existing Agentforce Agent, and the Prompt Template column adds reusable templates built in Prompt Builder. You can also manipulate data by using the Formula column, run evaluations by using the Evaluation column, or run platform actions by using Invocable Action and Update Record columns to write results back to CRM. With the text column, you can write data into the cells yourself.

You can refine prompts or agent configurations in real-time, receiving immediate feedback on the results. With this iterative approach, you're able to validate your solutions against real data up to the worksheet maximum, which you can configure up to 200 rows. After validation is complete, deploy your solution at scale by using established Salesforce automation tools like Flow or Data 360.

Grid Columns (Beta)

Grid uses two main types of columns to manage information. Data columns bring in and show information from CRM and Data 360. Action columns do things like run prompts, start functions, or call outside APIs, making the Grid interactive.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions.** [Required add-on licenses vary by agent type.](#)

Data Columns

Column	Description
Data Model Object	Queries data from Data 360
Object	Queries CRM data

Action Columns

Column	Description
Agent	Brings in an existing Agentforce Agent
AI	Creates Inline prompts and uses LLMs to generate, summarize, or extract content
Evaluation	Contains evaluations and metrics for evaluating Agents and Prompt Templates
Formula	Builds custom expressions by using Salesforce Expression Language
Invocable Action	Accesses standard invocable actions
Lookup	Imports related records
Prompt Template	Adds an existing prompt template from Prompt Builder
Text	Creates a writable space to add your own text
Update Record	Writes values from the worksheet back to a field in CRM

Column Fields

Every column contains these fields:

Field	description
Field Name	The name of the field.
Field Type	The type of field. This field is read-only.

Field	description
Run Query For	<p>You decide which execution mode to use: Run Per Row or Whole Column. Run Per Row runs the operation in each of the specified rows.</p> <p>Run Per Row mode runs the operation in each of the specified rows. For example, you use Run Per Row for an object column and tell it to get 25 accounts with a maximum of 10 rows. Grid runs the operation 10 times and returns 10 rows containing the same 25 accounts.</p> <p>Whole Column mode runs the operation once and returns the results in individual rows. For example, you use Whole Column and the query is to get 25 accounts. Grid runs the operation once and returns 25 accounts, each in their own row. Use this mode when importing standalone records.</p>
Max Rows	The maximum number of rows to return.

Column Interactions

You can query against columns by referencing them. To reference a column, you can @ mention them or, if you're working in SOQL, pass the values in as strings. For example:

```
SELECT Id, Subject, Status, Priority, ActivityDate, OwnerId, WhatId, CreatedDate
FROM Task
WHERE WhatId = '{Account.ID}'
ORDER BY CreatedDate DESC
```

Column Dependencies

As you work with your grid, you have source columns and reference, or dependent columns. Here's a couple of important things to know about the difference:

- When you update a source column, all the dependent columns are marked as stale. To update the data, refresh them manually.
- When running a row, source columns run first.

Column JSON

Many column types include a structured JSON view.

- Salesforce
- Data Model Object
- Lookup
- Prompt Template
- Agent
- Evaluation
- Invocable Action

To see the JSON, click a column cell to open a preview panel and click **JSON**. This interactive viewer lets you search for keys and values. You can also extract a value to a new column by clicking **+**.

Set Up Agentforce Grid (Beta)

To begin experimenting with and modifying records using Grid, first enable Einstein and assign the necessary permissions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To assign permission sets:	Assign Permission Sets
----------------------------	------------------------

1. From Setup, in the Quick Find box, enter *Einstein Setup*, and then select **Einstein Setup**.
2. Enable **Turn on Einstein**.
3. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
4. Click **New**.
5. Enter your permission set information.
6. Select the types of users for the permission set. Select a specific user or permission set license. Or, if you're assigning users with different licenses to the permission set, select **None**.
7. Add the Manage Agentforce Grids permission.
8. Assign the permission set to your users.

 **Note** To include prompt templates as an option, make sure that your users also have either the Prompt Template Manager or Prompt Template User permission set.

Create a Grid Worksheet (Beta)

After you have Einstein enabled and all the permissions assigned to your users, you're ready to get started exploring solutions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. [Required add-on licenses vary by agent type](#).

USER PERMISSIONS NEEDED

To create and modify Grid worksheets: Manage Agentforce Grids

1. From the App Launcher, find and select Agentforce Grid.
2. Click **Create Grid**.
3. Enter a name. Optionally, add a description that appears in the list of grids on the Home tab.
4. Click **Create**.
5. Select what you want to use to populate the first column.
 - Salesforce queries CRM records.
 - Data Model Object queries Data 360 records.
 - AI uses an LLM to generate data.
 - Agent lets you test utterances.
 - You can also upload your own data from a CSV file.
6. With data in place, you're ready to start adding and experimenting.
 - To create more columns Click **+Add Column**.
 - To reference the data in one column, @ mention it in another column.
 - To see column details or sort the data and edit or delete it, click the column header.
 - To export or delete your grid or upload a CSV file, click the options icon. 
 - To add a new worksheet tab to your grid, click **+**.
 - To rename your worksheet, double-click the tab name.
 - To modify a cell, double-click it and change the text.
 - To run data in a column, save it or click **Update All Cells in this Column**.
 - To run data in a cell, click the run button.
 - To run data in a row, select the rows and click **Run**.
 - To run data in the entire worksheet, select all the rows and click **Run**.

Agentforce Grid Troubleshooting and Tips

Here are some tips and best practices as you start experimenting with Grid.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions. [Required add-on licenses vary by agent type.](#)

- If your cells aren't updating, wait about 30 seconds and then refresh the page.
- If you need rich text formatting, use AI to convert text to HTML.
- To find related records, use Lookup columns.
- If you aren't getting the performance you like, try switching models.
- Use Formula columns to concatenate instructions and data before you bring in your agent.
- Be prescriptive in your AI prompts. For example, use this prompt:
You will be given a list of tasks. Based on the task descriptions and due dates, identify the highest priority task. Here is the list of tasks: {Task list}
Instead of this prompt:
Summarize {Task List} and identify the highest priority task.

Einstein Data Prism

Einstein Data Prism is a grounding solution for generative AI applications within Salesforce, improving the accuracy of AI solutions that use its grounding capabilities. With Einstein Data Prism, automatically ground your large language models (LLMs) so you can gain more accurate and relevant responses to utterances. Einstein Data Prism is automatically enabled in integrated apps, such as Einstein Segment Creation and Agentforce.

REQUIRED EDITIONS

 **Note** Prism and Metadata Studio aren't supported in Government Cloud Plus. Don't turn on the feature in Government Cloud Plus orgs. Contact your Salesforce account executive for more details.

Available in: Lightning Experience

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

As part of the Data Prism offering, you can also use the Metadata Studio app. Metadata Studio keeps the human in the loop. It enables the user to improve the results generated by generative AI by validating and contributing business knowledge to the AI-generated metadata descriptions.

Smart Grounding of Structured Data

Smart Grounding provides the large language models (LLMs) with the business context to create relevant responses based on accurate and up-to-date metadata, ensuring that outputs are finely tuned to your

users' intents and contexts. Data Prism pinpoints the exact data entities relevant to the natural language question, increasing the accuracy of results and providing greater coverage for large organizations. With Data Prism, generative AI apps, such as Einstein Segment Creation, receive a grounded dataset from the original schema to ensure that accurate data is returned.

How Does Einstein Data Prism Work?

After Data Prism is provisioned in your organization, all metadata is scanned (schema, relationships, sample values, and descriptions). All missing descriptions are generated automatically and saved in a vector database. During runtime, when a user asks a natural language question in a Salesforce app, the generative AI app calls the Data Prism API and sends the requested natural language utterance. Data Prism then sends the tables and fields that match the natural language utterance back to the app as focused grounding data. The apps can therefore use this focused grounding data to get more accurate results from the large language models (LLMs).

 **Note** The provisioning process can take up to 24 hours to complete.

To improve the Data Prism results, you can enhance your metadata by enriching the LLM-generated descriptions using the Metadata Studio. Generated descriptions are used in any case, but it's highly recommended to validate and enrich them to make sure the results are accurate.

Data Prism Use Cases

Einstein Data Prism improves the responses and results to utterances or prompts across various Salesforce apps. Here are some examples of how you can use it.

 **Segment Creation Based on User Description** A marketing manager wants to create highly targeted customer segments for a new product launch. They can describe a required target audience in natural language, such as "Create a segment of doctors who are fitness enthusiasts and speak Spanish". Without Data Prism, it can be hard for the system to identify the correct attributes. With Data Prism, the system identifies and categorizes customers accordingly based on the company's available data. This enhancement enables marketing teams to tailor their campaigns to unique customer groups quickly without creating overhead on data experts, thus shortening the planning cycle and increasing efficiency.

Billing Considerations for Data Prism

Data Prism uses Data 360 to query sample data and Einstein Requests to call generative AI. Data Prism is called by the Agentforce QueryRecords action and the Data 360 Einstein Segment creation feature. Use of Data Prism impacts the consumption of credits used for billing in these usage types.

Metadata Studio

Use the Metadata Studio to enhance your generative AI results across Salesforce apps that are integrated with Data Prism, such as Einstein Segment Creation. With the Metadata Studio, review and validate all your objects and fields, add missing descriptions, and enhance AI-generated descriptions to gain an accurate semantic representation when querying natural language prompts. If needed, you

can also exclude irrelevant objects in the data source so that they aren't sent to the Large Language Models (LLMs) or returned when grounding.

Navigate the Metadata Studio

Explore the different sections of the Metadata Studio to better understand how to get the best results when validating your metadata.

Validate Metadata Entities in the Metadata Studio

To improve your Einstein results in Data Prism integrated apps, validate an object or field label, by adding or editing an entity description. Standard objects and fields with a description are automatically imported from Salesforce documentation and they're marked as validated. You can still edit them if you have additional information that's relevant.

Exclude Entities in the Metadata Studio

Use the exclude function when you want to exclude fields or objects that are no longer in use or are no longer relevant to agent use cases. If fields or objects are excluded, they're not used by Data Prism for grounding purposes. Exclusion only affects solutions that use Data Prism's API.

Billing Considerations for Data Prism

Data Prism uses Data 360 to query sample data and Einstein Requests to call generative AI. Data Prism is called by the Agentforce QueryRecords action and the Data 360 Einstein Segment creation feature. Use of Data Prism impacts the consumption of credits used for billing in these usage types.



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](#).

Credits aren't consumed for initial setup of Data Prism. After initial setup, credits are consumed when data is queried and when Data Prism is used to generate or embed data.

Digital Wallet Card	Usage Type	Usage Type Description	Notes
Data Services	Data Queries	Usage is calculated based on the number of records processed. The count of records processed depends on the structure of a query as well as other related factors such as the total number of records in the objects being queried.	Data Prism uses data queries to retrieve sample data once a year.
Einstein Requests	Standard	Einstein Requests is a usage	Einstein Requests aren't billed when using Data Prism in Einstein Segment creation.

Digital Wallet Card	Usage Type	Usage Type Description	Notes
		<p>metric for generative AI. The use of generative AI capabilities, in either a production or sandbox environment, consumes Einstein Requests and possibly Data Cloud credits.</p> <p>API calls to the LLM gateway use Einstein Requests. For each API call to the LLM gateway, the number of Einstein Requests used depends on the API call size factor and the LLM usage type multiplier.</p>	
Data Storage	Storage Beyond Allocation	Usage is calculated based on the amount of storage used above the amount allocated.	Identity resolution stores the output of ruleset runs in Data 360 data model objects.

For more information on how Data 360 usage is billed, refer to your contract or contact your account executive.

See Also

[Salesforce Help: Data 360 Billable Usage Types](#)

[Salesforce Help: Generative AI Billable Usage Types](#)

Metadata Studio

Use the Metadata Studio to enhance your generative AI results across Salesforce apps that are integrated with Data Prism, such as Einstein Segment Creation. With the Metadata Studio, review and validate all your objects and fields, add missing descriptions, and enhance AI-generated descriptions to gain an accurate semantic representation when querying natural language prompts. If needed, you can also exclude irrelevant objects in the data source so that they aren't sent to the Large Language Models (LLMs) or returned when grounding.

REQUIRED EDITIONS

 **Note** Prism and Metadata Studio aren't supported in Government Cloud Plus. Don't turn on the feature in Government Cloud Plus orgs. Contact your Salesforce account executive for more details.

Available in: Lightning Experience

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

Data Prism pinpoints the exact data entities relevant to the natural language question, increasing the accuracy of results and providing greater coverage of data. For more information, see [Einstein Data Prism](#).

The Metadata Studio is accessible from the App Launcher.

Metadata Studio Use Case

The Metadata Studio is used to review the accuracy of the metadata labels and descriptions, add missing descriptions, and exclude unnecessary entities.

 **Solar Panel Company** A company that sells solar panels has created a custom object to track their attributes: SP_info_att. The object contains no description. When scanning the object, Data Prism auto-generates the description to "The table holds attributes of stored procedures," thinking that SP stands for Stored Procedures. With Metadata Studio, the user can update the labels and descriptions of the SP_info_att object and fields to something relating to Solar Panels. Now that the data has a more accurate semantic representation, Data Prism can return the custom object when a user asks a natural language question about solar panels.

Navigate the Metadata Studio

Explore the different sections of the Metadata Studio to better understand how to get the best results when validating your metadata.

REQUIRED EDITIONS

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Available in: Lightning Experience

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Filter the page and focus on specific entities. By default, the table displays all entities that require reviewing. If you've excluded fields, then you can use the Excluded Entities view to show only excluded entities (1).

Select the required data source (dataspace or Core org depending on your purchased products). If you have Data 360, all available dataspaces appear. If you have a Core App, the Core org appears (2).

Validate or exclude entities either one-by-one, or by selecting multiple entities and performing a bulk action. Validating or excluding entities can also be done inside the object table by selecting Validate or Exclude from the dropdown menu (3).

Review how many entities (objects and fields) have been validated. To increase metadata coverage, add missing descriptions and edit if necessary to validate the accuracy of the generated descriptions. Adding descriptions or business logic as part of the object descriptions can help improve your metadata coverage and results (4).

Explore the objects in your metadata, and view how many fields within that object require validating. By default, you can see all the objects depending on the selected dataspace or Core App org under the All Objects node. If you select a specific object (on the left navigation) you can see all the fields that belong to that object (in the object table on the right-hand side) (5).

Review the accuracy of the metadata labels and descriptions, add missing descriptions, and validate or exclude entities. Adding descriptions or business logic as part of the object descriptions can help improve your metadata coverage and results. All generated descriptions appear in light blue, indicating they were generated by generative AI (6).

Validate Metadata Entities in the Metadata Studio

To improve your Einstein results in Data Prism integrated apps, validate an object or field label, by adding or editing an entity description. Standard objects and fields with a description are automatically imported from Salesforce documentation and they're marked as validated. You can still edit them if you have additional information that's relevant.

REQUIRED EDITIONS

 **Note** Prism and Metadata Studio aren't supported in Government Cloud Plus. Don't turn on the feature in Government Cloud Plus orgs. Contact your Salesforce account executive for more details.

Available in: Lightning Experience

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

USER PERMISSIONS NEEDED

To review metadata:

Metadata Studio User

OR

Modify All Data

Custom objects and field descriptions are automatically imported or generated using sample data and Large Language Models (LLMs) via the Salesforce LLM gateway, which uses Salesforce's trust layer

including PII detection. For more information about PII masking, see [Data Masking](#).

You can focus on specific metadata by selecting a data source or relevant dataspace depending on your purchased products. If you have Data Cloud all available dataspaces appear.

To validate metadata entities:

1. From the App Launcher, select **Metadata Studio**
 2. Select the required data source (if you have Data Cloud, all relevant dataspaces appear. If you have a Core App, the Core org appears.). You can only select one data source at a time, but you can validate the metadata for all your data sources if necessary. If a description is missing during the scan process, an automatically generated description appears in the Metadata Studio (All generated descriptions appear in light blue, indicating they were generated by generative AI).
 3. Review the generated description, and edit it if more information is needed.
-  **Note** It takes up to 15 minutes for changes made to descriptions to take effect.
4. To validate, select the dropdown and then select **Validate**.
 5. If you want to validate more than one entity, select all the entities you're validating and then on the top right, click **Validate**.

Exclude Entities in the Metadata Studio

Use the exclude function when you want to exclude fields or objects that are no longer in use or are no longer relevant to agent use cases. If fields or objects are excluded, they're not used by Data Prism for grounding purposes. Exclusion only affects solutions that use Data Prism's API.

REQUIRED EDITIONS

 **Note** Prism and Metadata Studio aren't supported in Government Cloud Plus. Don't turn on the feature in Government Cloud Plus orgs. Contact your Salesforce account executive for more details.

Available in: Lightning Experience

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To review metadata:

Metadata Studio User

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Modify All Data

To exclude metadata entities:

1. From the App Launcher, select **Metadata Studio**

2. Select the required data source (if you have Data Cloud, all relevant dataspaces appear. If you have a Core App, the Core org appears.). You can only select one data source at a time, but you can validate the metadata for all your data sources if necessary.
3. To exclude an entity, select the dropdown and then select **Exclude**.
4. If you want to exclude more than one entity, select all the entities you're excluding and then on the top right, click **Exclude**.