**What is Agentforce?**

* **Agentforce** is the **new name for Einstein Copilot**.
* AI-powered conversational assistant inside Salesforce that understands user queries, fetches and processes CRM data, and performs actions intelligently using a reasoning engine and large language model.

**🧩 5 Building Blocks of Agentforce (Einstein Copilot)**

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| **#** | **Building Block** | **Description** | **Example** |
| 1 | **Agent** | The AI assistant integrated into Salesforce UI. You can configure what the agent can do and which topics it handles. | *Sales Copilot* or *Service Copilot* |
| 2 | **Topic** | A **category of actions** related to a specific business area. | “Sales”, “Billing”, “Support” |
| 3 | **Actions** | Define **how the copilot performs tasks**. Two types: – Standard Actions (fetch, summarize, create)– Custom Actions (user-defined). | Fetch records, summarize cases, draft email |
| 4 | **Reasoning Engine (Planner Service)** | The **brain** that orchestrates which **topic and actions** to run during a conversation. | Determines that “order status” question belongs to “Sales” topic and runs fetch + summarize actions |
| 5 | **Large Language Model (LLM)** | Understands and generates **natural language responses**. Enables Copilot to communicate conversationally and take action. | ChatGPT-like model behind Copilot |

**⚙️ How It Works**

* **User asks a question** in natural language.
* **LLM** interprets the question.
* **Reasoning Engine** identifies the relevant **topic**.
* It selects the correct **actions** to perform.
* **Agent** executes those actions and responds contextually.

**Main Characteristics of Einstein Copilot**

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| **#** | **Characteristic** | **Description** |
| 1 | **Understands Natural Language** | Copilot can understand **human language** — users can express instructions as if talking to a person. |
| 2 | **Conversational** | Copilot remembers the **context of an ongoing conversation** and responds accordingly. Each new input is interpreted in relation to previous dialogue. |

**🧩 Core Concepts**

**1. Actions**

Define **what tasks** the Copilot can perform.

**Two types:**

1. **Standard Actions** – Predefined tasks like:

Summarize records

Retrieve records by name

Draft an email

1. **Custom Actions** – Created by admins/developers when standard actions are insufficient.

Example: *Escalate a Case* (not available as a standard action)

Custom Actions can be built using: **Flows, Apex, Prompt Templates**

**2. Topics**

* A **category or grouping** of related actions.
* Helps Copilot **organize and identify** which actions apply to a user’s request.
* Each action must belong to a **topic**.

🧭 Example Topics:

* **Sales** → Create lead, summarize opportunity
* **Service** → Retrieve case, escalate issue
* **Billing** → Generate invoice summary

**3. Event Logs**

* Used to **monitor and troubleshoot** Copilot conversations.
* Record all **interaction details** between users and copilot.
* Useful for debugging, auditing, and improving Copilot performance.

🧾 **Purpose:** View conversation activity, identify failures, and track usage patterns.

**4. Productivity Benefits**

Copilot boosts productivity by:

* Summarizing CRM records (lead, opportunity, case)
* Fetching key insights quickly
* Reducing manual navigation and clicks

**5. Copilot Planner Service (Reasoning Engine)**

* Also called **Reasoning Engine**.
* It **orchestrates which topic and which actions** to launch during a conversation.

Handles **runtime decision-making** — identifies:

* Which **topic** a question belongs to
* Which **action(s)** to perform
* The **execution sequence** to complete the user’s task

**6. Copilot Builder**

* **Tool used to configure, test, and manage** Einstein Copilot.
* Accessible via **Open in Builder** button.

You can:

* Create/edit **Topics**
* Add/configure **Actions**
* **Test conversations**
* **Audit Copilot activity**

**🔐 Einstein Copilot Access & Permissions**

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| **Permission Set Group** | **Purpose** | **Includes Permission Sets** |
| **1. Copilot for Salesforce Admin** | Allows building, managing, and configuring Copilots. | - Einstein Copilot for Salesforce Admin- Prompt Template User |
| **2. Copilot for Salesforce User** | Allows users to access and use Copilot assistant in Salesforce. | - Einstein Copilot for Salesforce User- Prompt Template User |