



Arizona
Jan 22 & 23
2025

Architecture Patterns with Agentforce and Data Cloud



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Data & AI
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I work

In Tall Buildings
John Hartford



Ryan Cox
Distinguished Technical Architect

Forward Looking Statements

This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: our ability to meet the expectations of our customers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including related to AI and Agentforce; our ability to execute our business plans; the pace of change and innovation in enterprise cloud computing services; and our ability to maintain and enhance our brands.

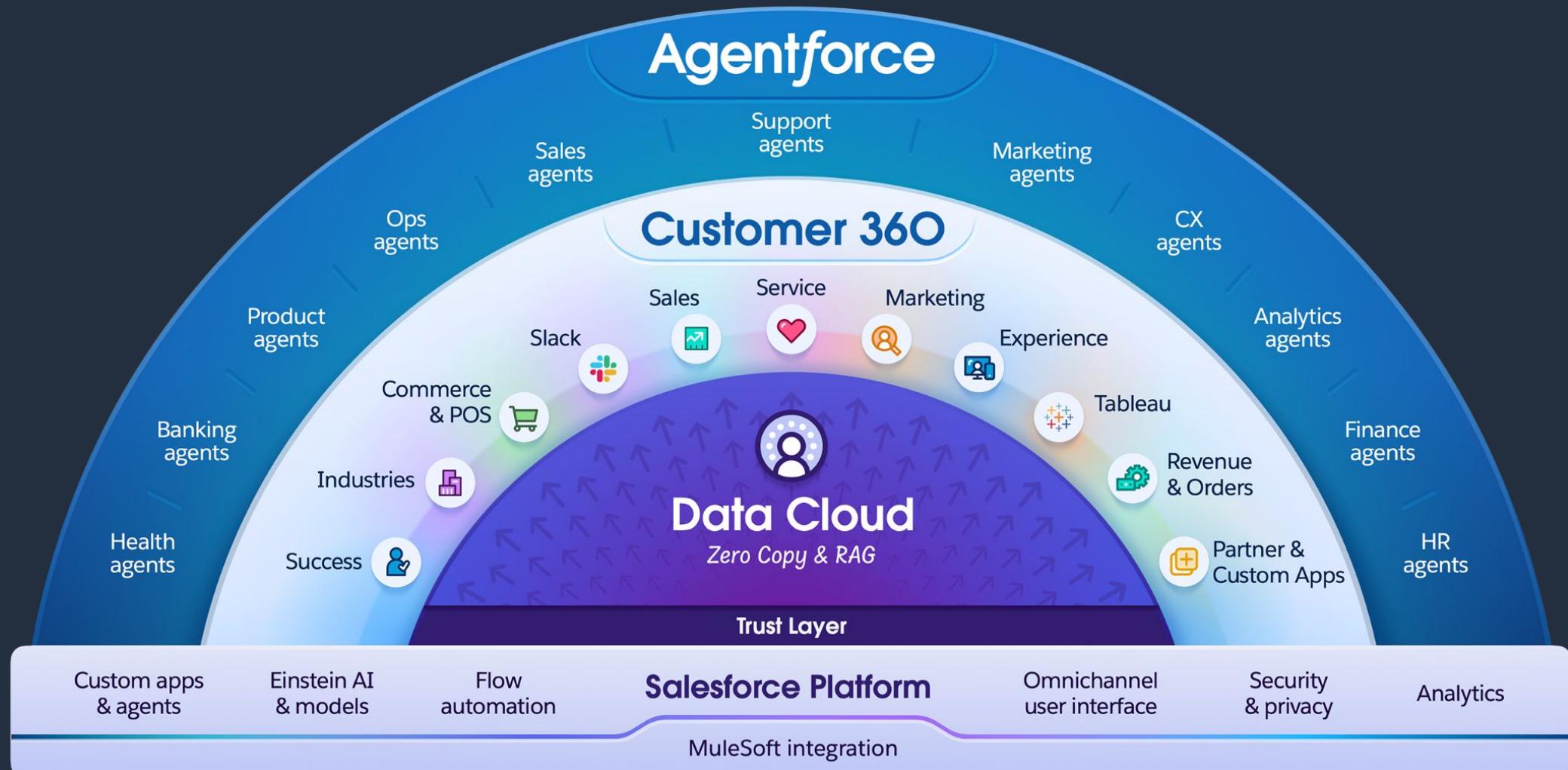


If you wish to make an apple pie from scratch



You must first invent the universe

Only the Salesforce Platform brings together Humans + Agents + Data + CRM + Trust



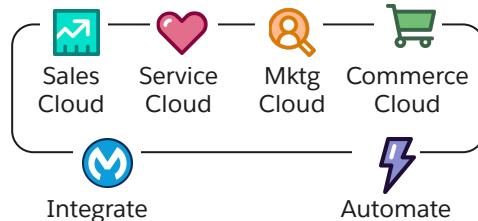
Data Cloud Unlocks Your Trapped Data



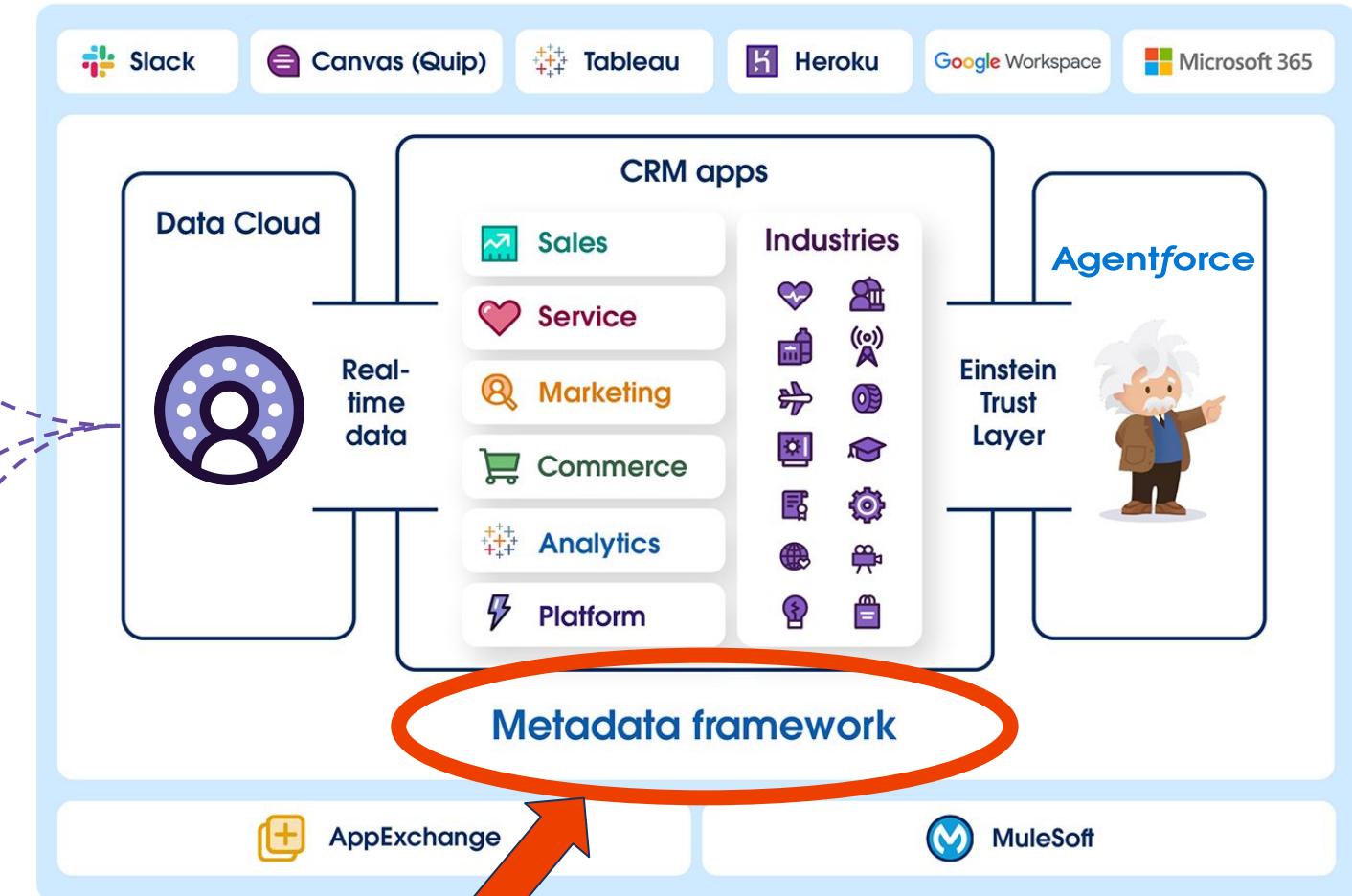
1P & 3P Data Sources



Salesforce C360 Integrations



Bring Your Own Lake



very important

Why Data Cloud?



Autonomous actions in the flow of work



Atlas Agent Platform



Write any query.



Jane Smith

Why is the light
on my RoboVac
Series 7 blinking?

Working on this...



◆◆◆



Enterprise Knowledge



Trusted Data Store

Knowledge Extraction

Trusted Vector Store

Ensemble RAG



Digital Assistant

Intent Detection

Understands the intention behind users' queries

Query Processing

Handles and responds to user queries. *Modes: Thoughtful, Smart, Professor*

Planning & Orchestration

Devise a strategy for appropriate assistance | *Job-Based vs Task-Based*

Actions

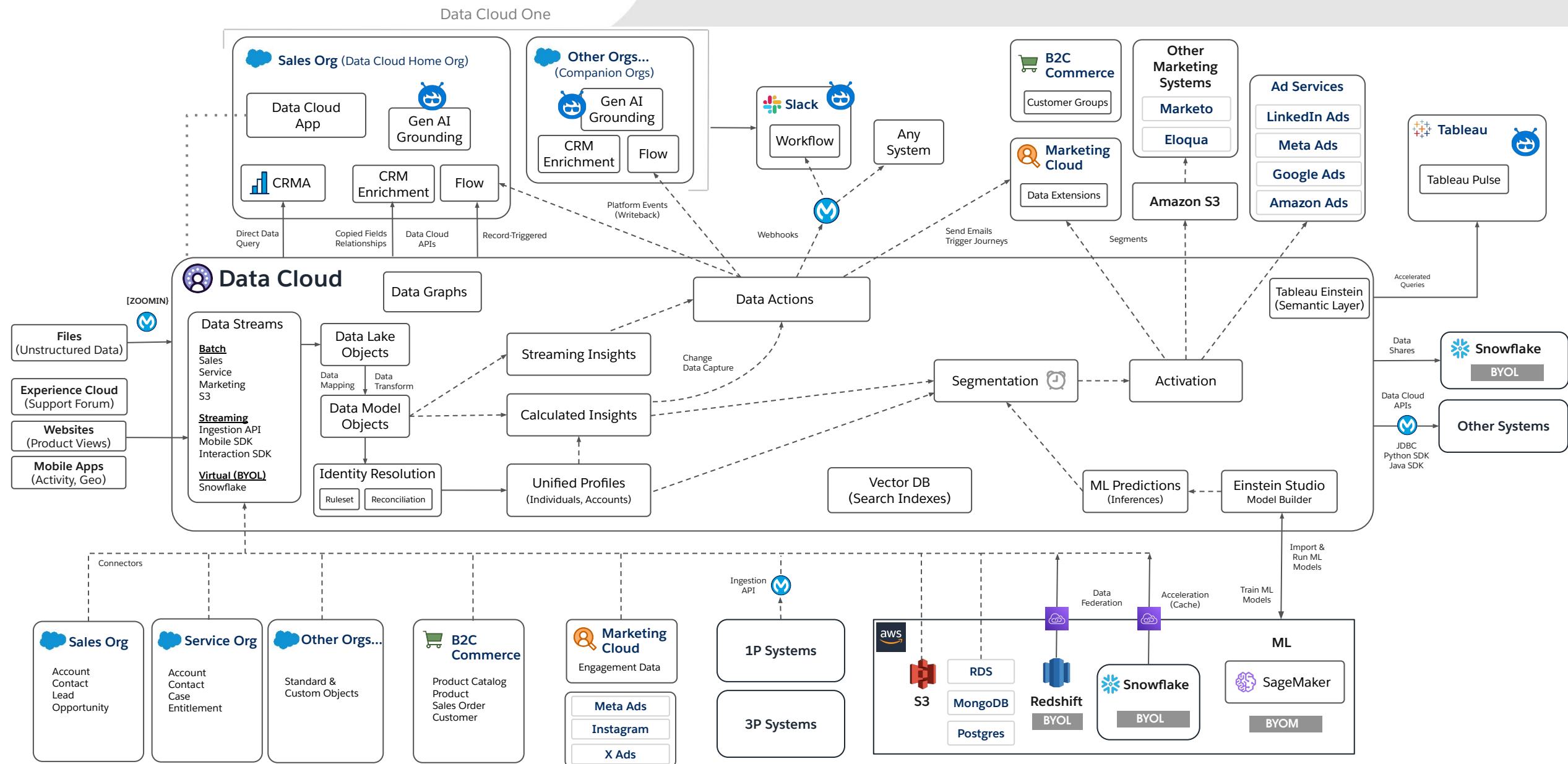
Invokes Salesforce Copilot Actions | Standard & Custom

User Memory
Short term | Long Term

Agentforce + Data Cloud

Vision for the Salesforce platforms within an enterprise architecture

(+ everything else)



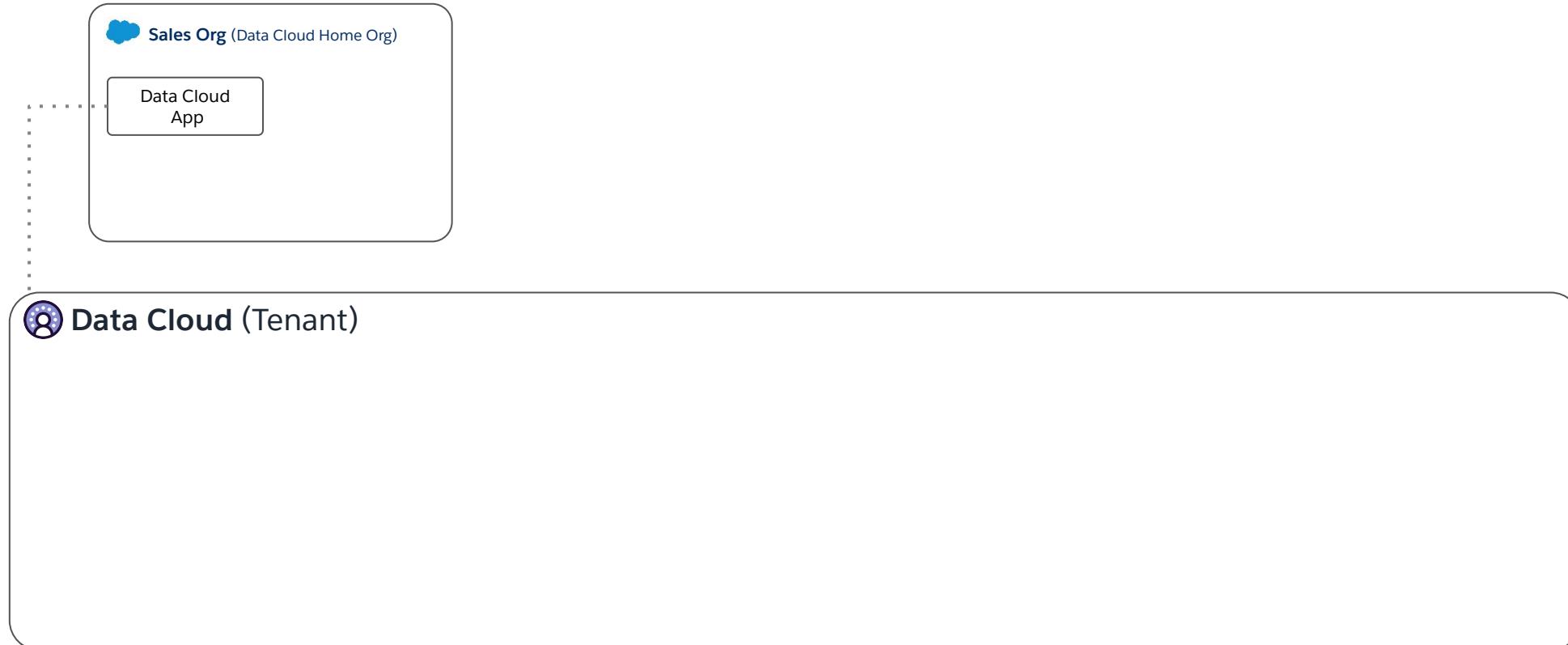
Architecture of the growing Salesforce ecosystem



Data Cloud



Data Cloud Instance



Data Cloud

Batch Data Ingestion and Harmonization

Frequency

Real-time

2 mins

5 mins

10 mins

15 mins

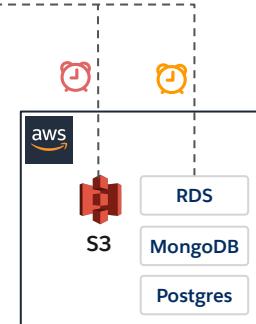
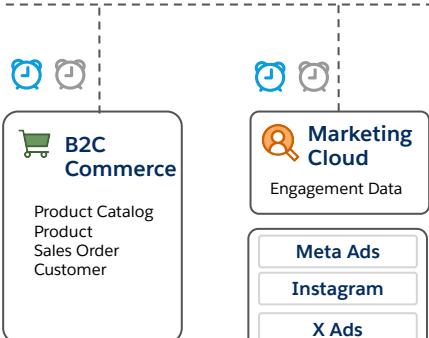
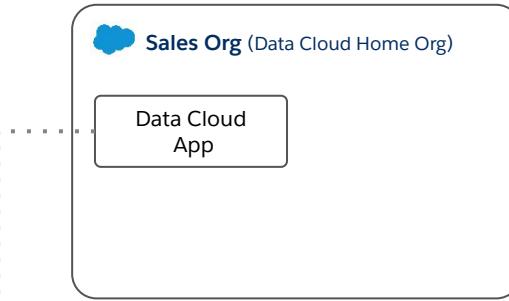
Hourly

Daily

Weekly

Real-Time

Scheduled or Async



Data Cloud

Streaming Data Ingestion and Ingestion API

Frequency

Real-time

2 mins

5 mins

10 mins

15 mins

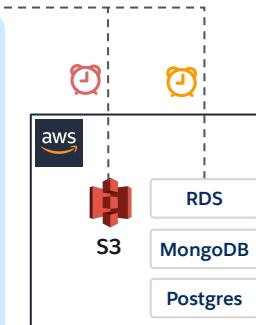
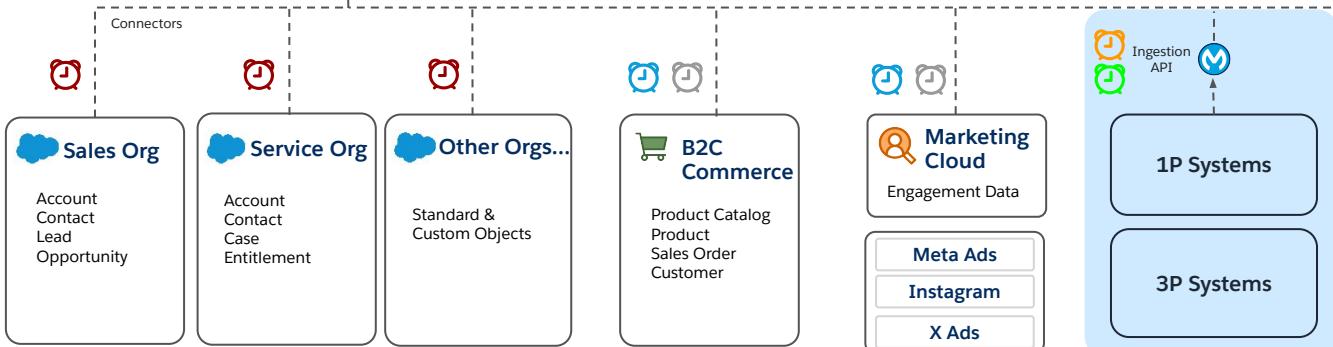
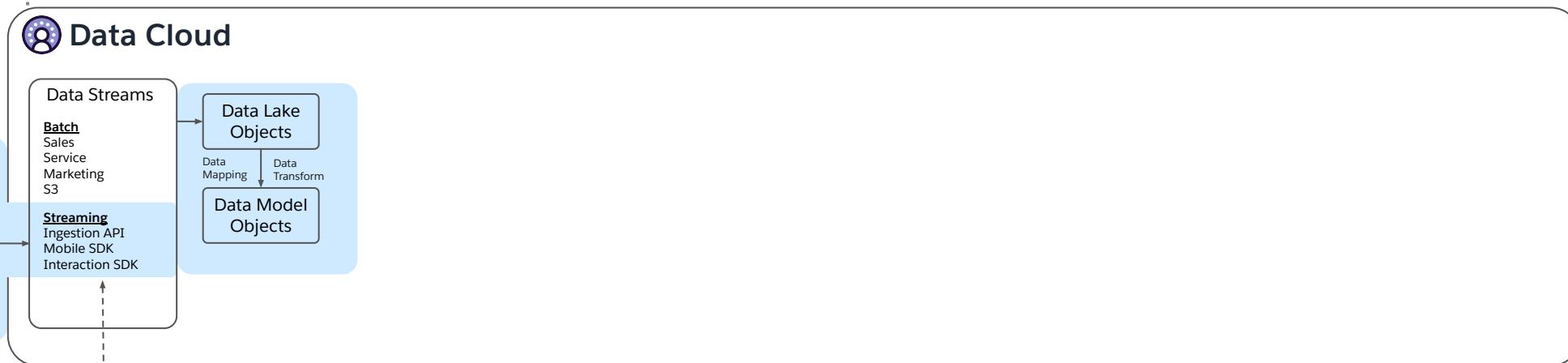
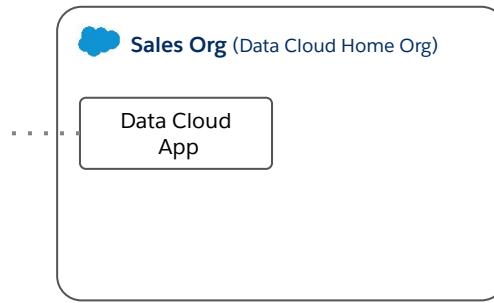
Hourly

Daily

Weekly

Real-Time

Scheduled or Async



Data Cloud

Bring Your Own Lake (BYOL)

Frequency

Real-time

2 mins

5 mins

10 mins

15 mins

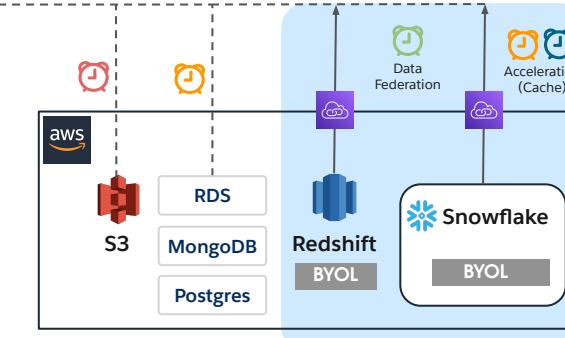
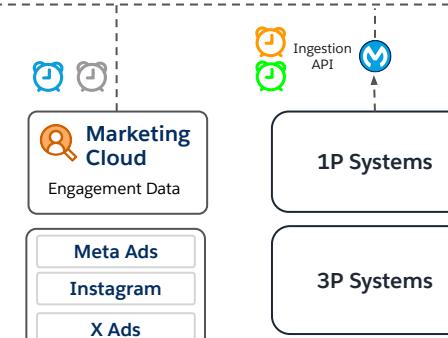
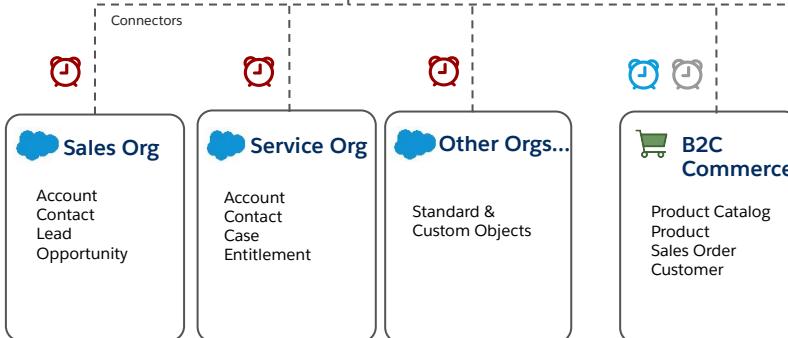
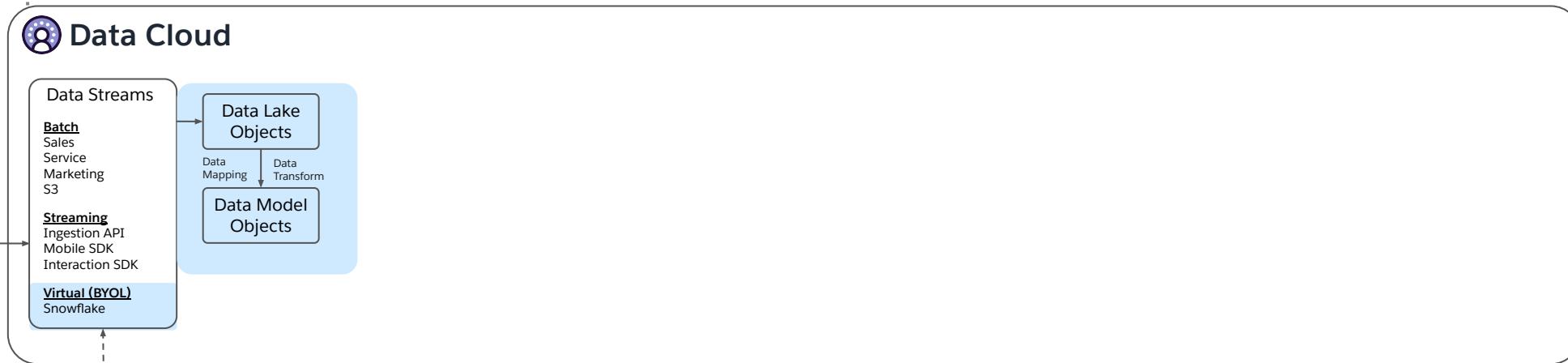
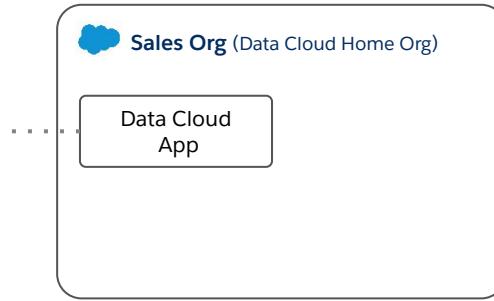
Hourly

Daily

Weekly

Real-Time

Scheduled or Async



Data Cloud

Profile Unification

Frequency

Real-time

2 mins

5 mins

10 mins

15 mins

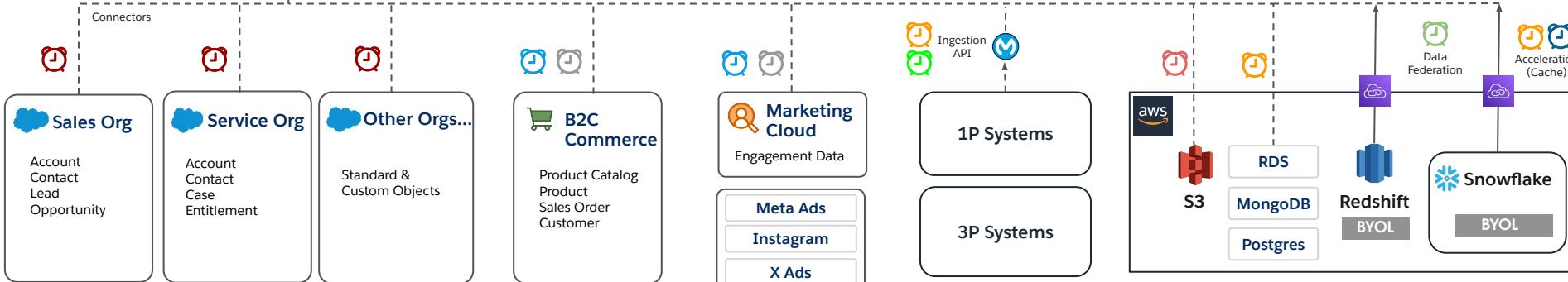
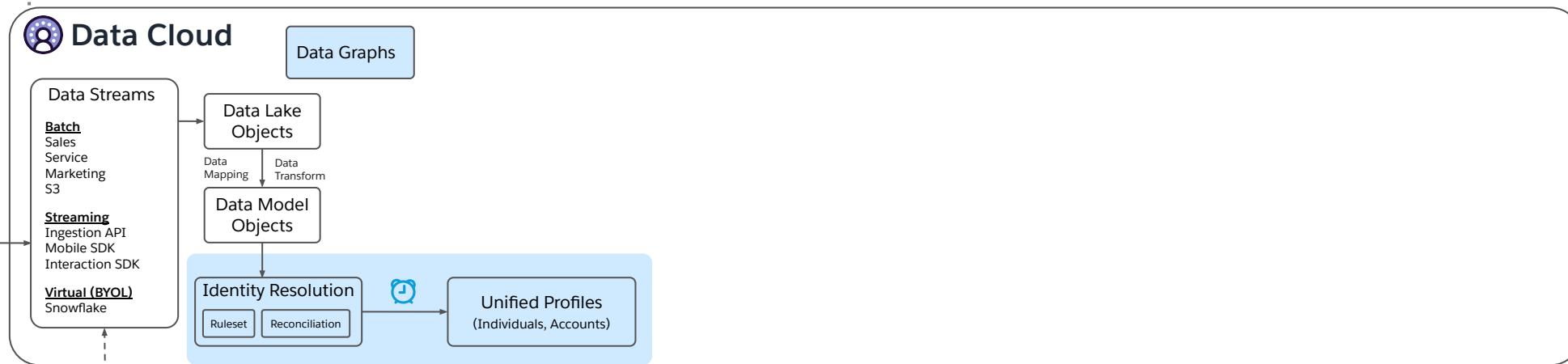
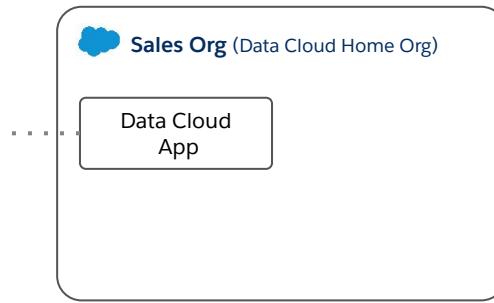
Hourly

Daily

Weekly

Real-Time

Scheduled or Async



Data Cloud

Calculated Insights

Frequency

Real-time

2 mins

5 mins

10 mins

15 mins

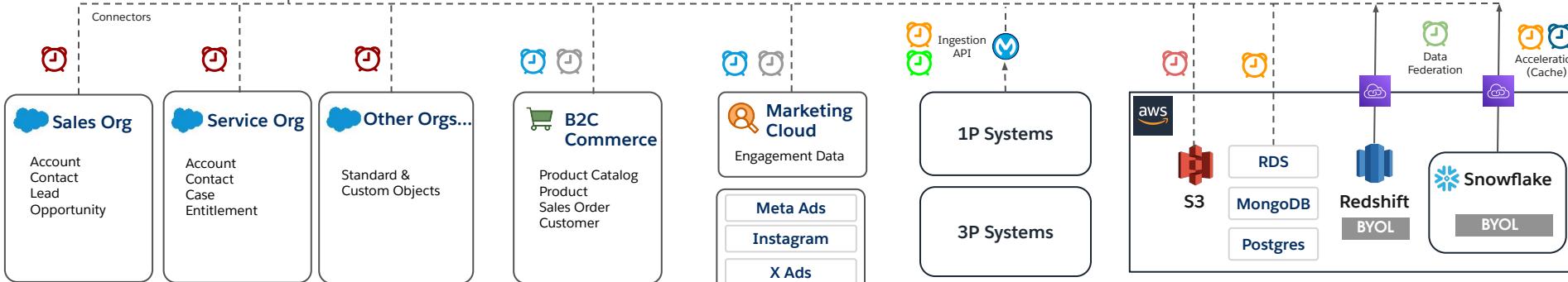
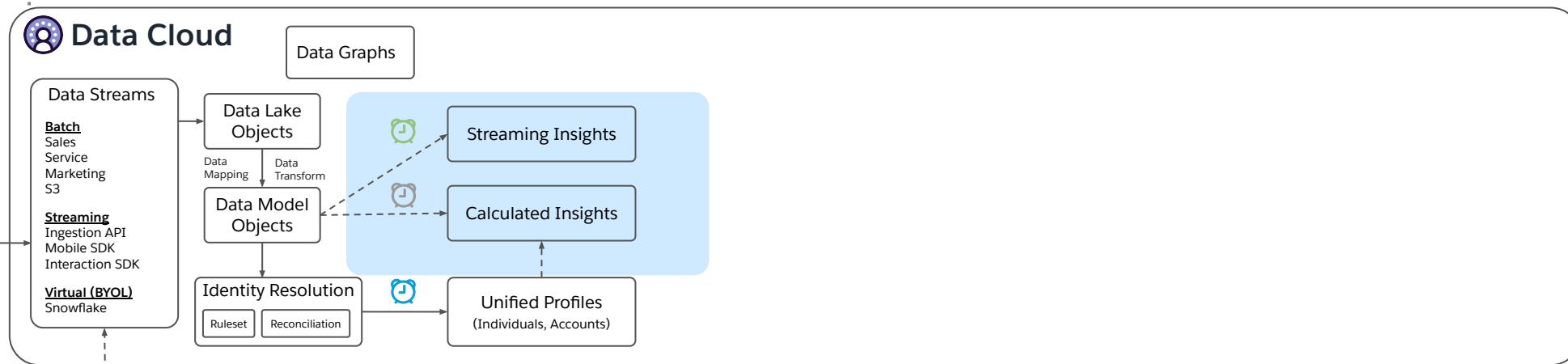
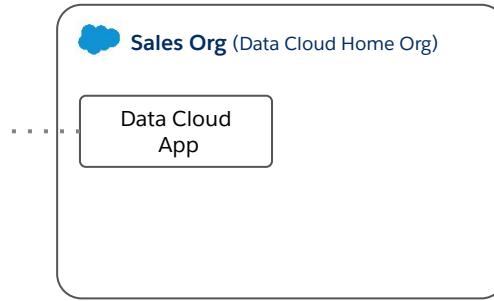
Hourly

Daily

Weekly

Real-Time

Scheduled or Async



Data Cloud

Data Actions

Frequency

Real-time

2 mins

5 mins

10 mins

15 mins

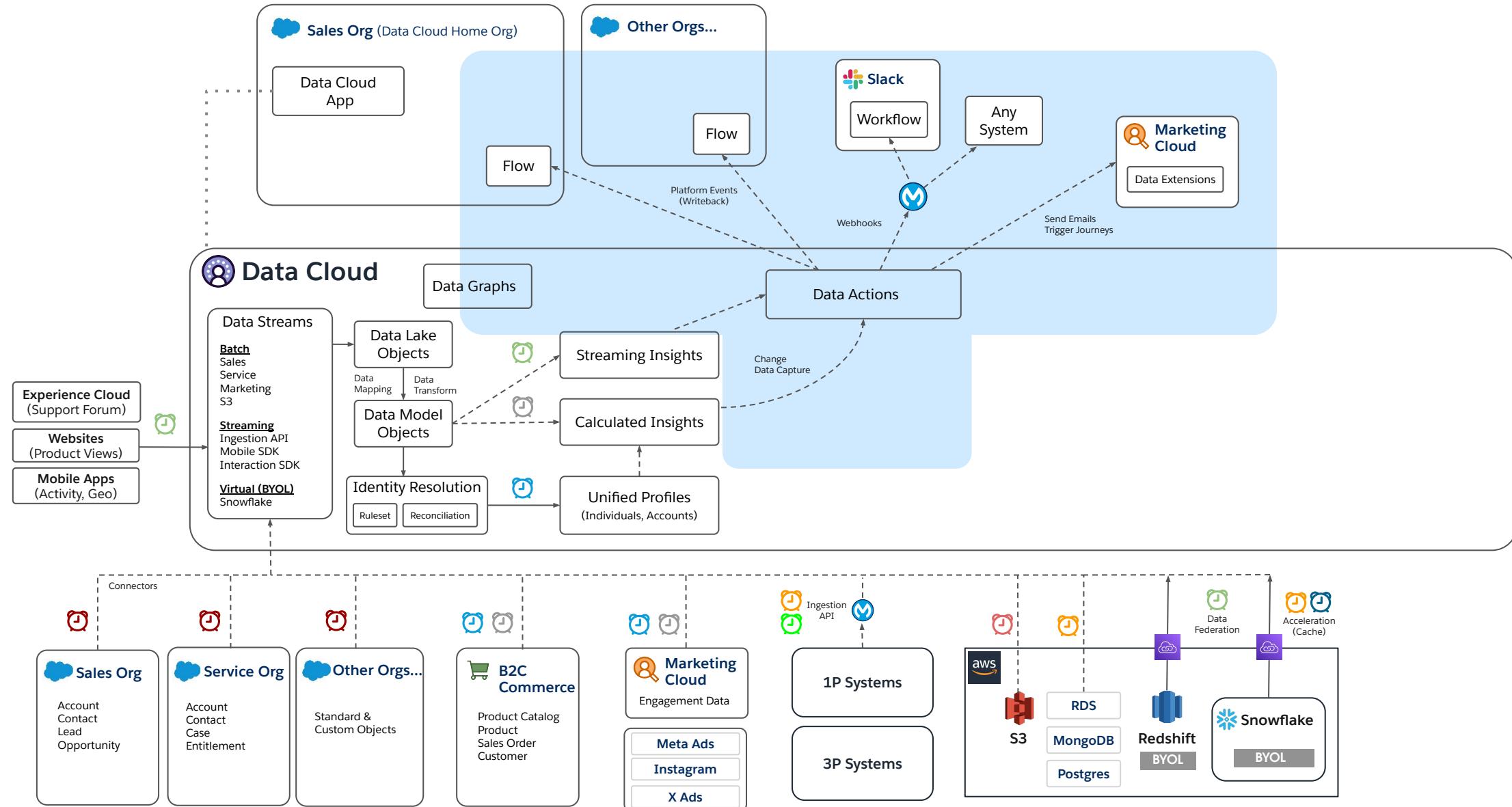
Hourly

Daily

Weekly

Real-Time

Scheduled or Async



Data Cloud

CRM Enrichment & Agents

Frequency

Real-time

2 mins

5 mins

10 mins

15 mins

Hourly

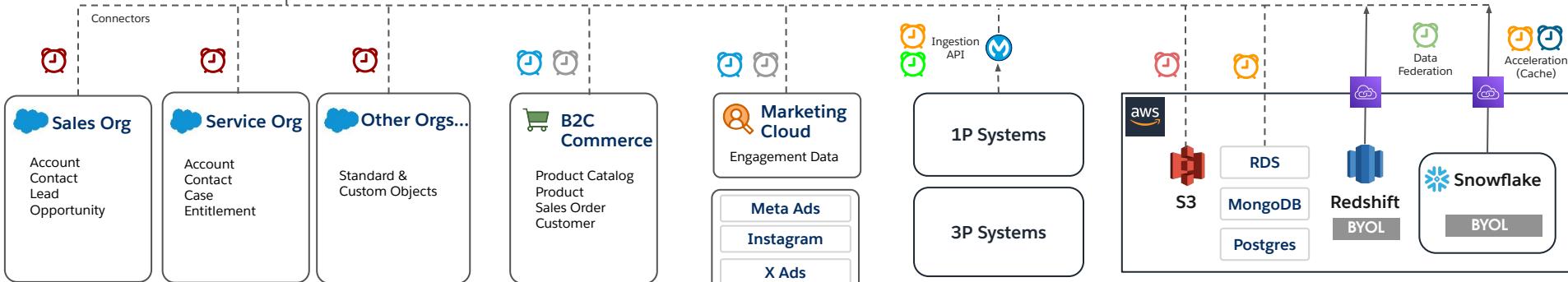
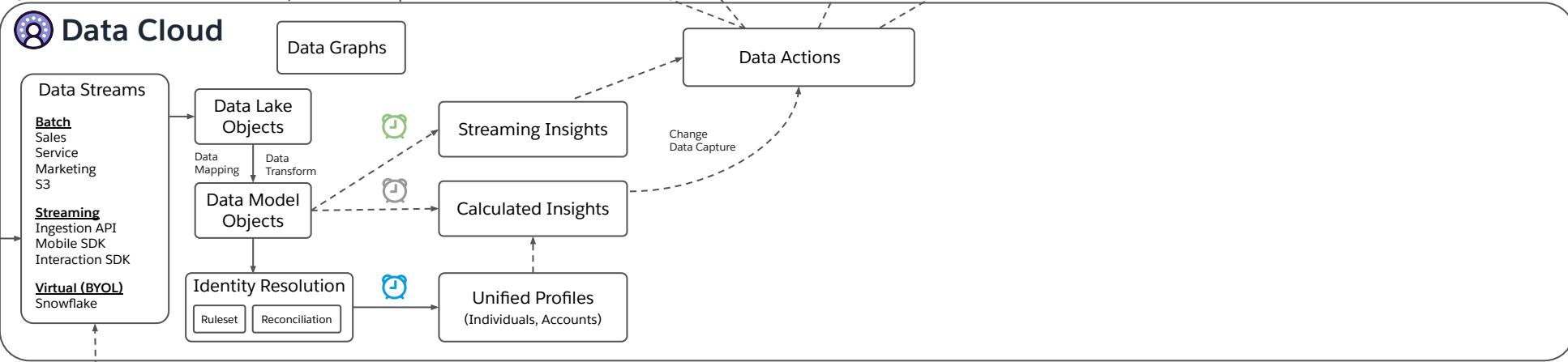
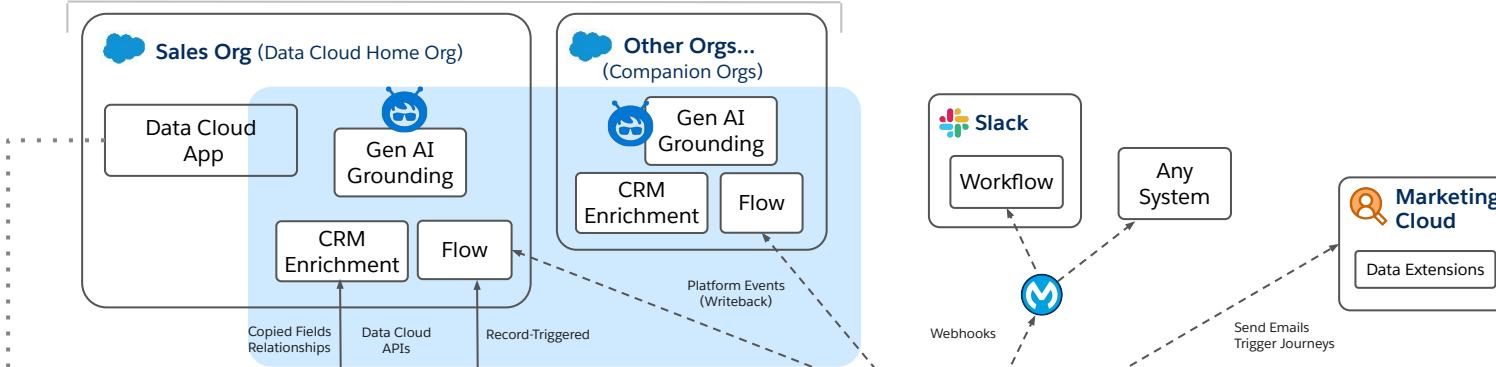
Daily

Weekly

Real-Time

Scheduled or Async

Data Cloud One



Data Cloud

Train and Run ML Models

Frequency

Real-time

2 mins

5 mins

10 mins

15 mins

Hourly

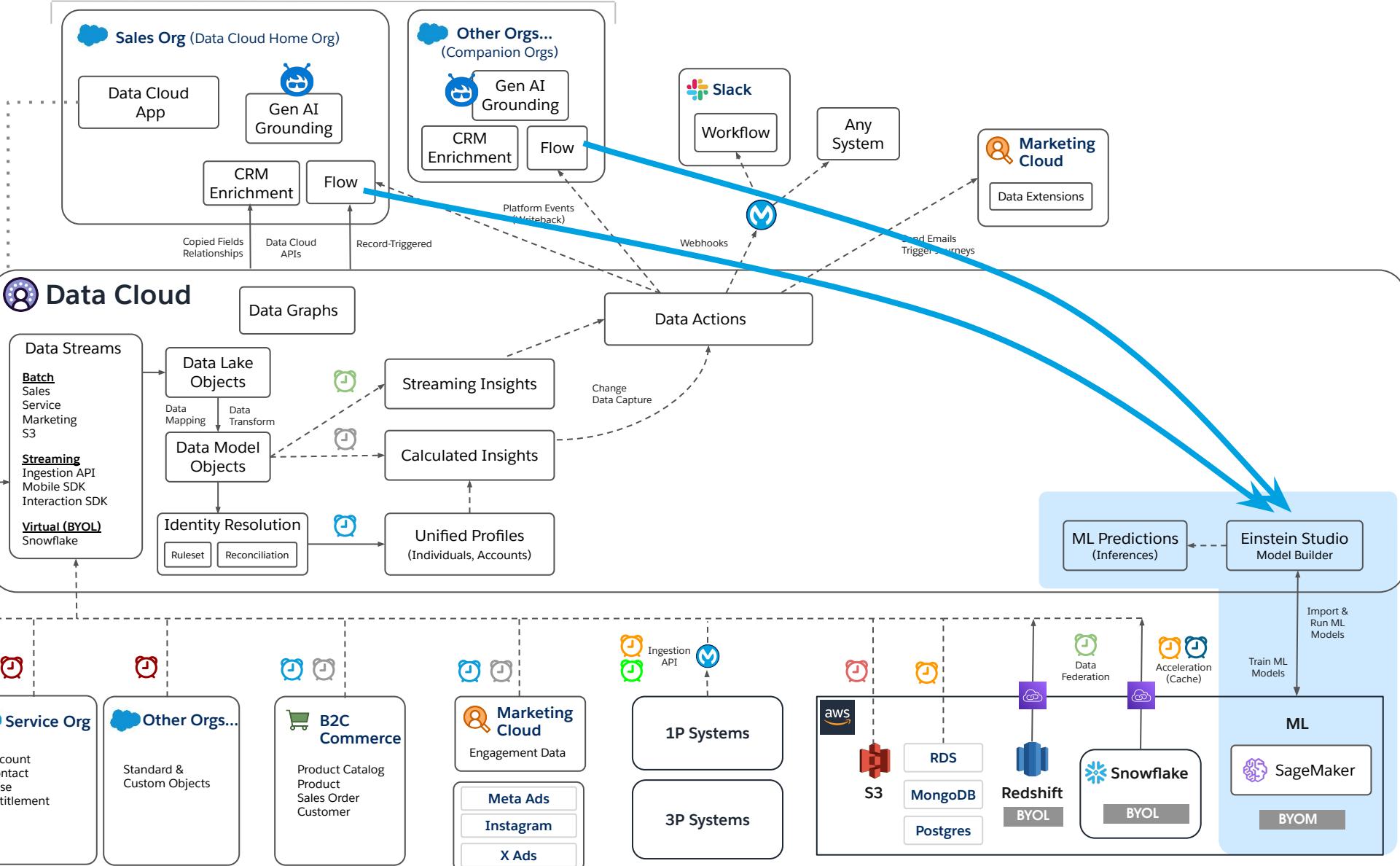
Daily

Weekly

Real-Time

Scheduled or Async

Data Cloud One



Data Cloud

Marketing Segmentation and Activation

Frequency

Real-time

2 mins

5 mins

10 mins

15 mins

Hourly

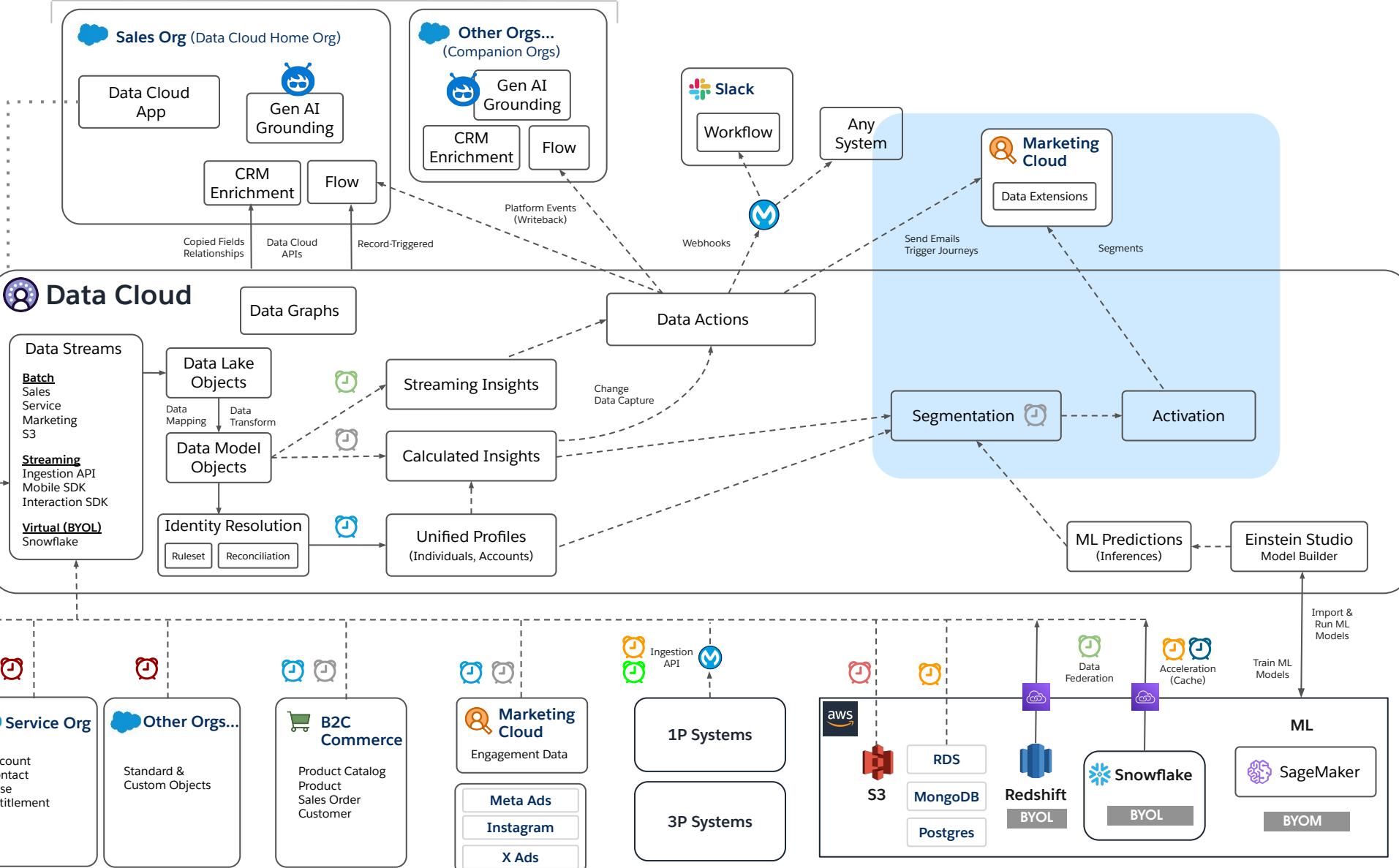
Daily

Weekly

Real-Time

Scheduled or Async

Data Cloud One



Data Cloud

Marketing Segmentation and Activation (++targets)

Frequency

Real-time

2 mins

5 mins

10 mins

15 mins

Hourly

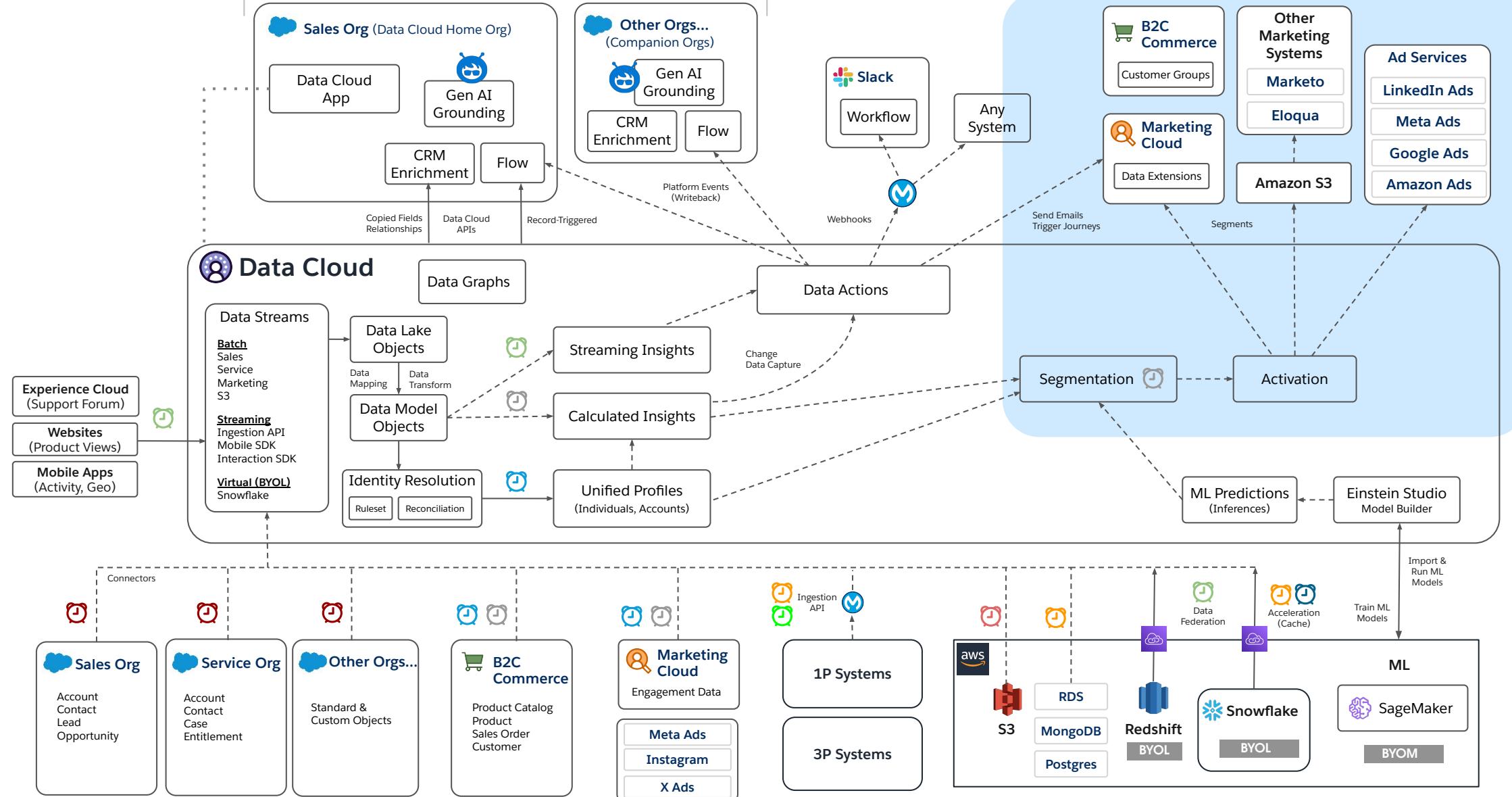
Daily

Weekly

Real-Time

Scheduled or Async

Data Cloud One



Data Cloud

Analytics and Data Sharing

Frequency

Real-time

2 mins

5 mins

10 mins

15 mins

Hourly

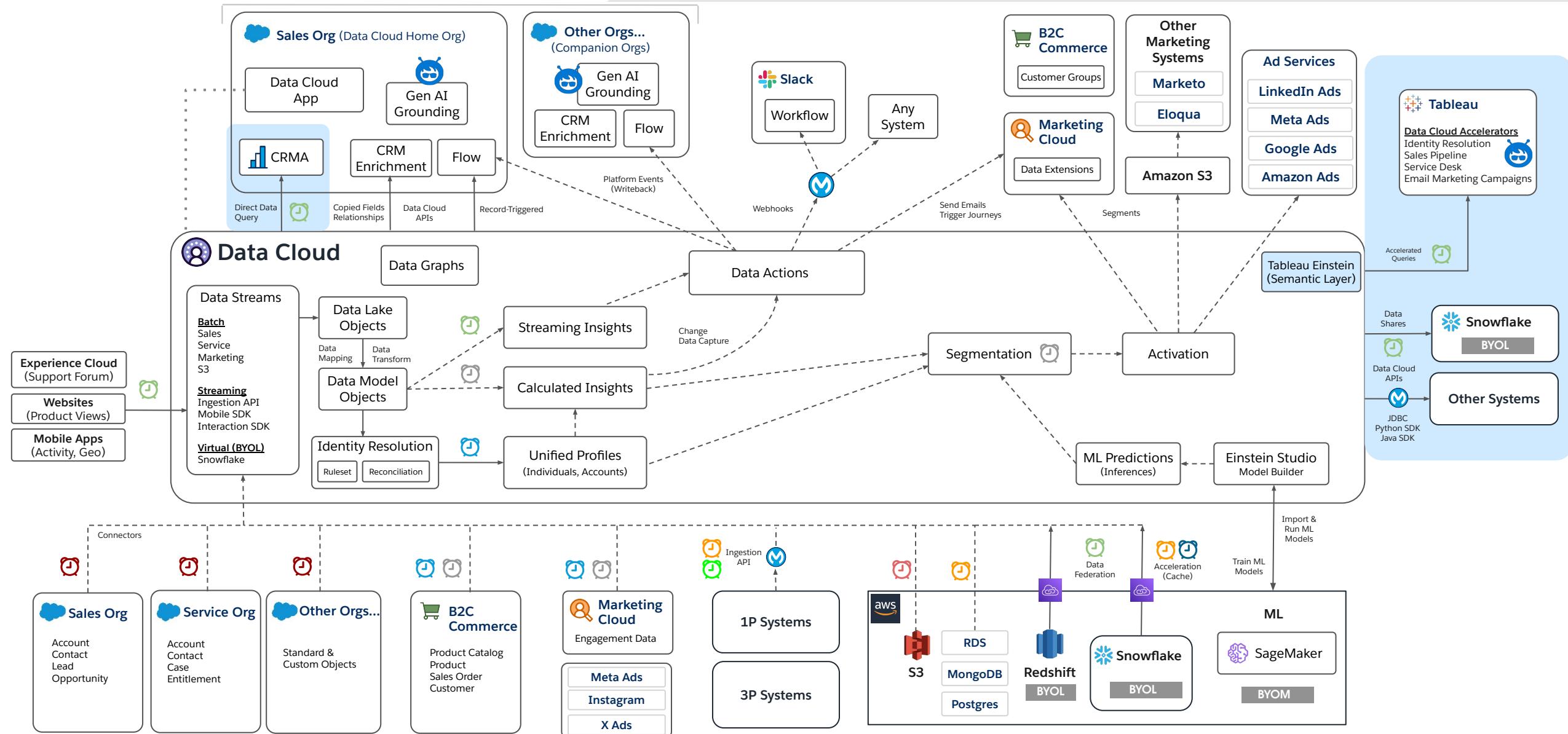
Daily

Weekly

Real-Time

Scheduled or Async

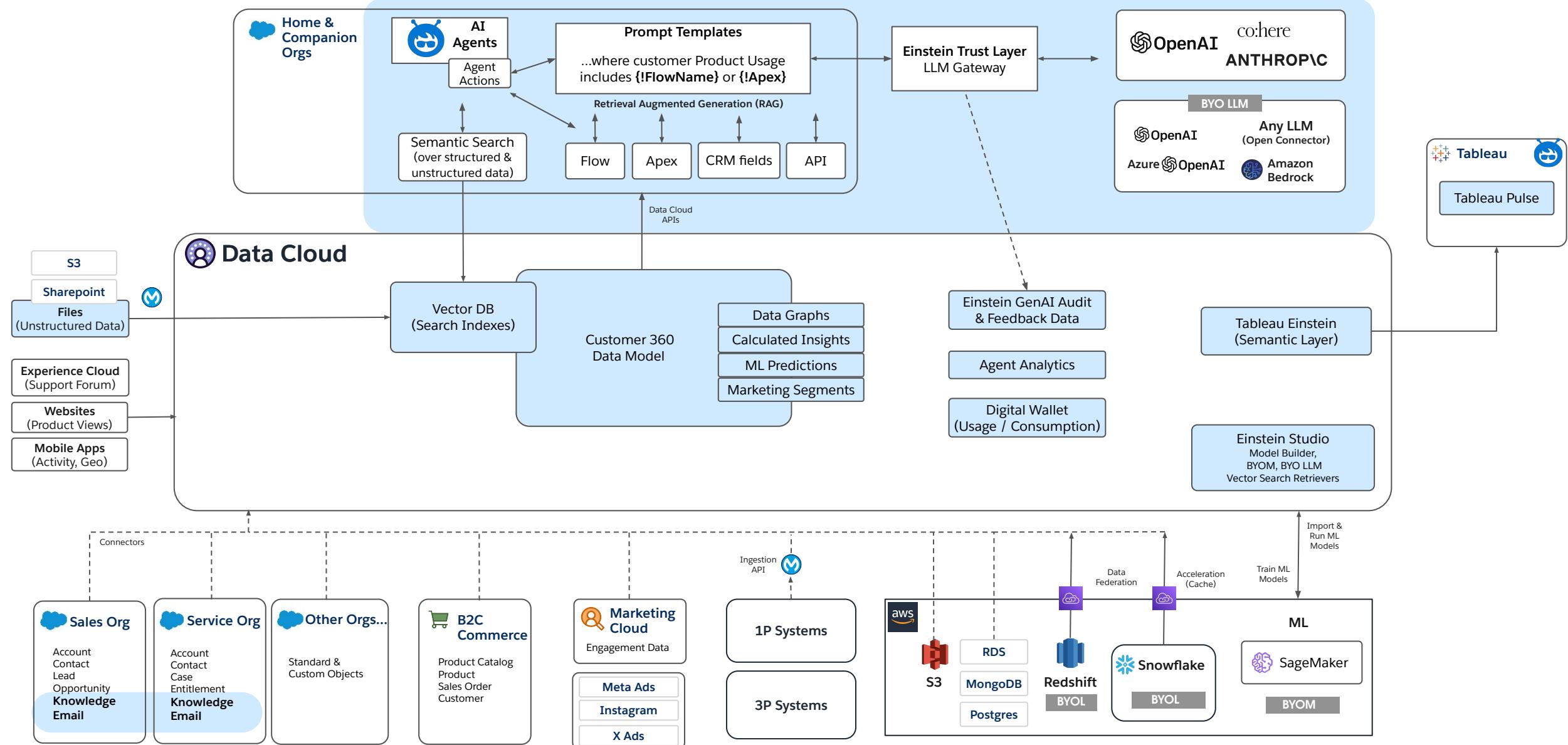
Data Cloud One



AI + Data Cloud



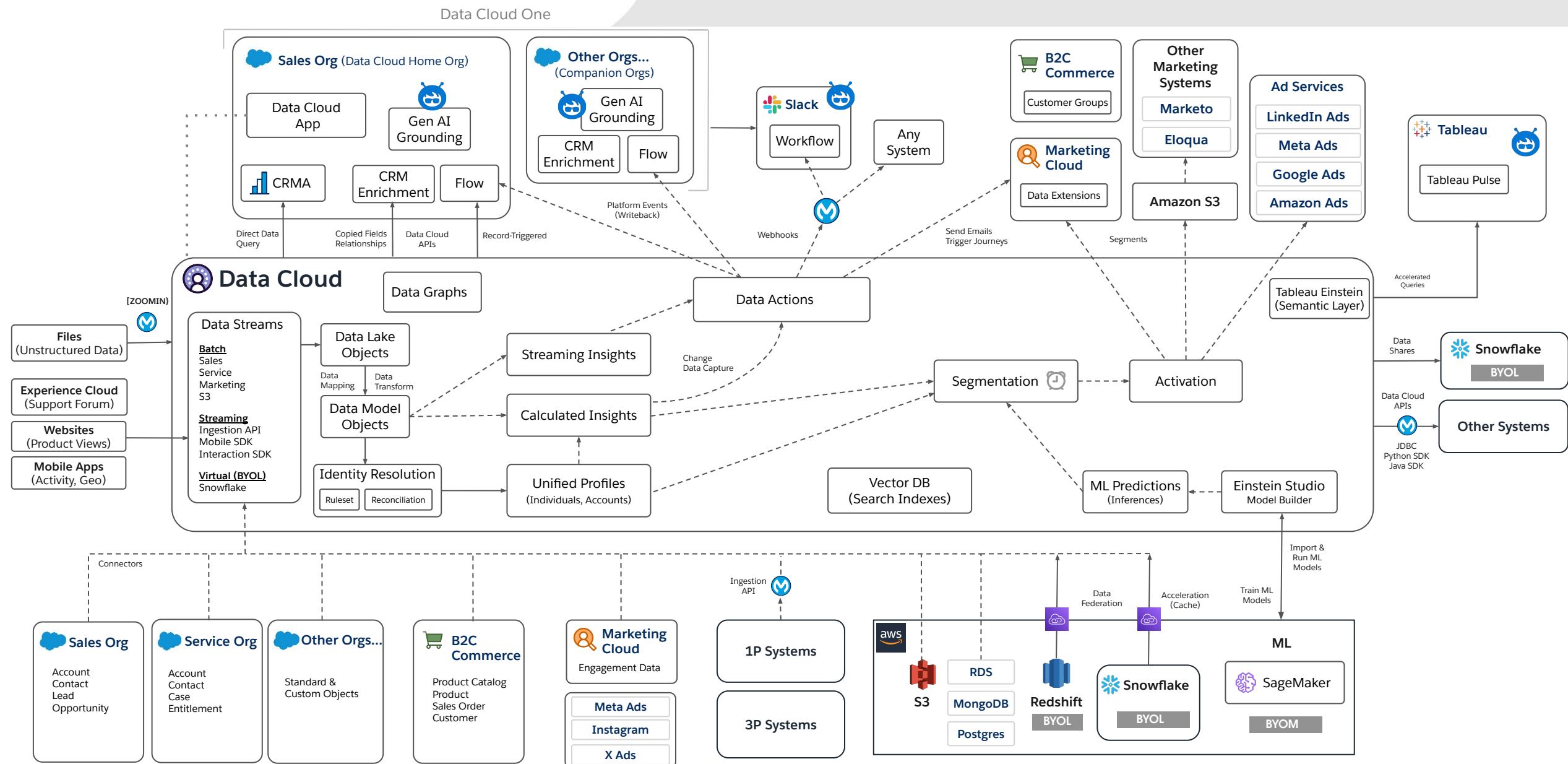
Agents & Generative AI with Data Cloud



Agentforce + Data Cloud

Vision for the Salesforce platforms within an enterprise architecture

(+ everything else)

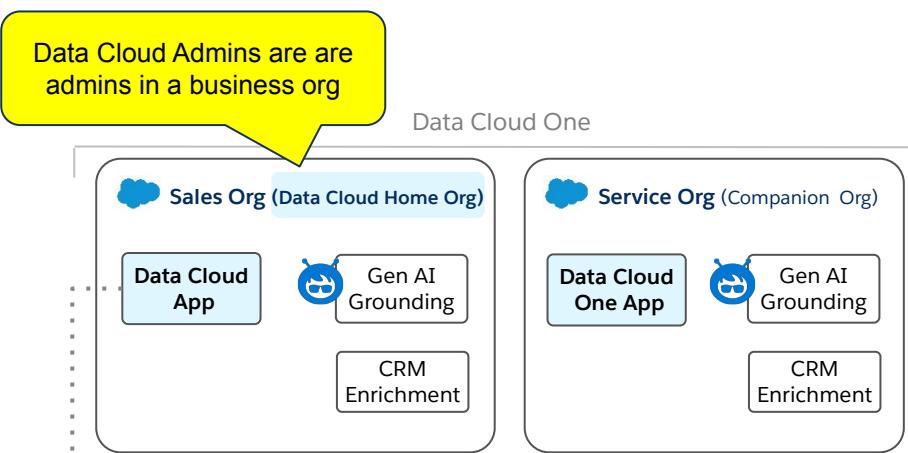


Salesforce Org Strategies (w/ Data Cloud & Agentforce)

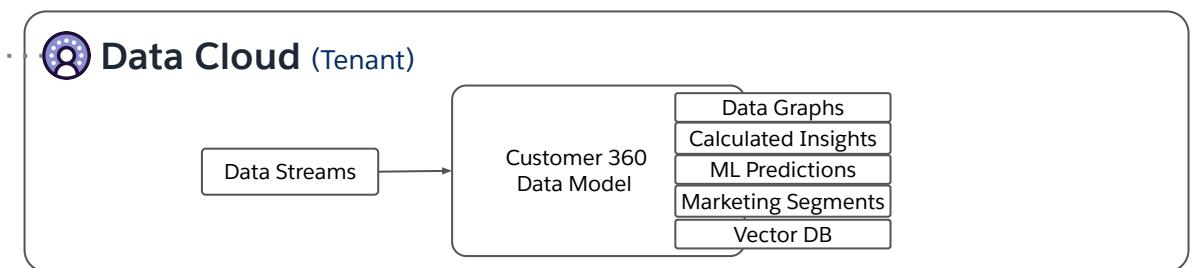
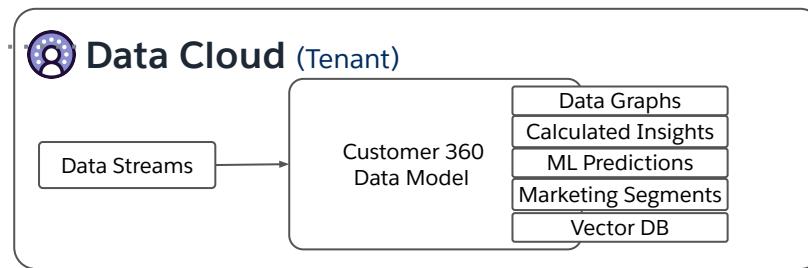
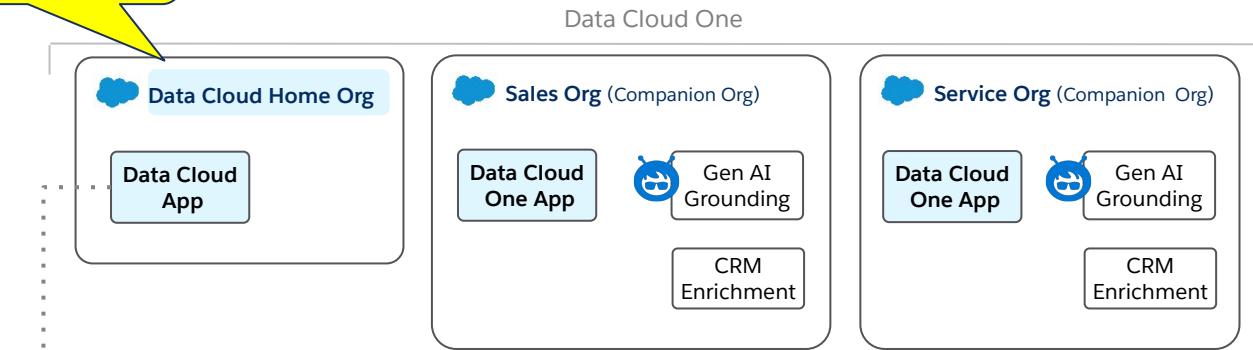
Data Cloud Home Org Options



Data Cloud Home in an Existing Org



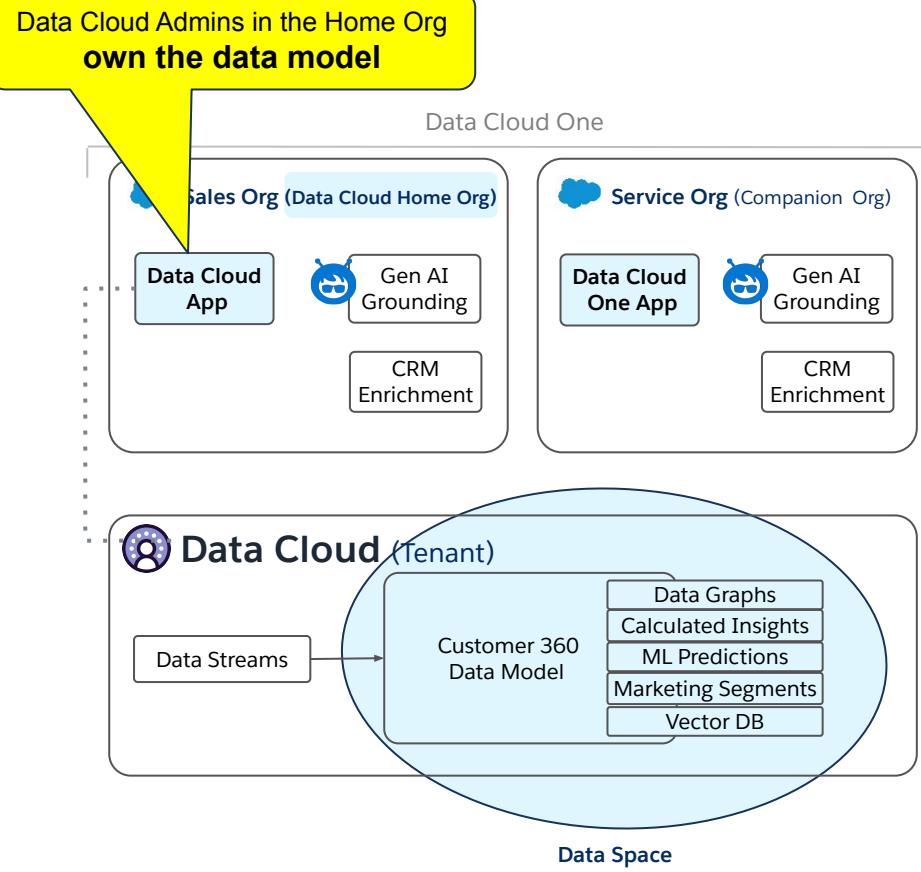
Data Cloud Home in a Dedicated Org



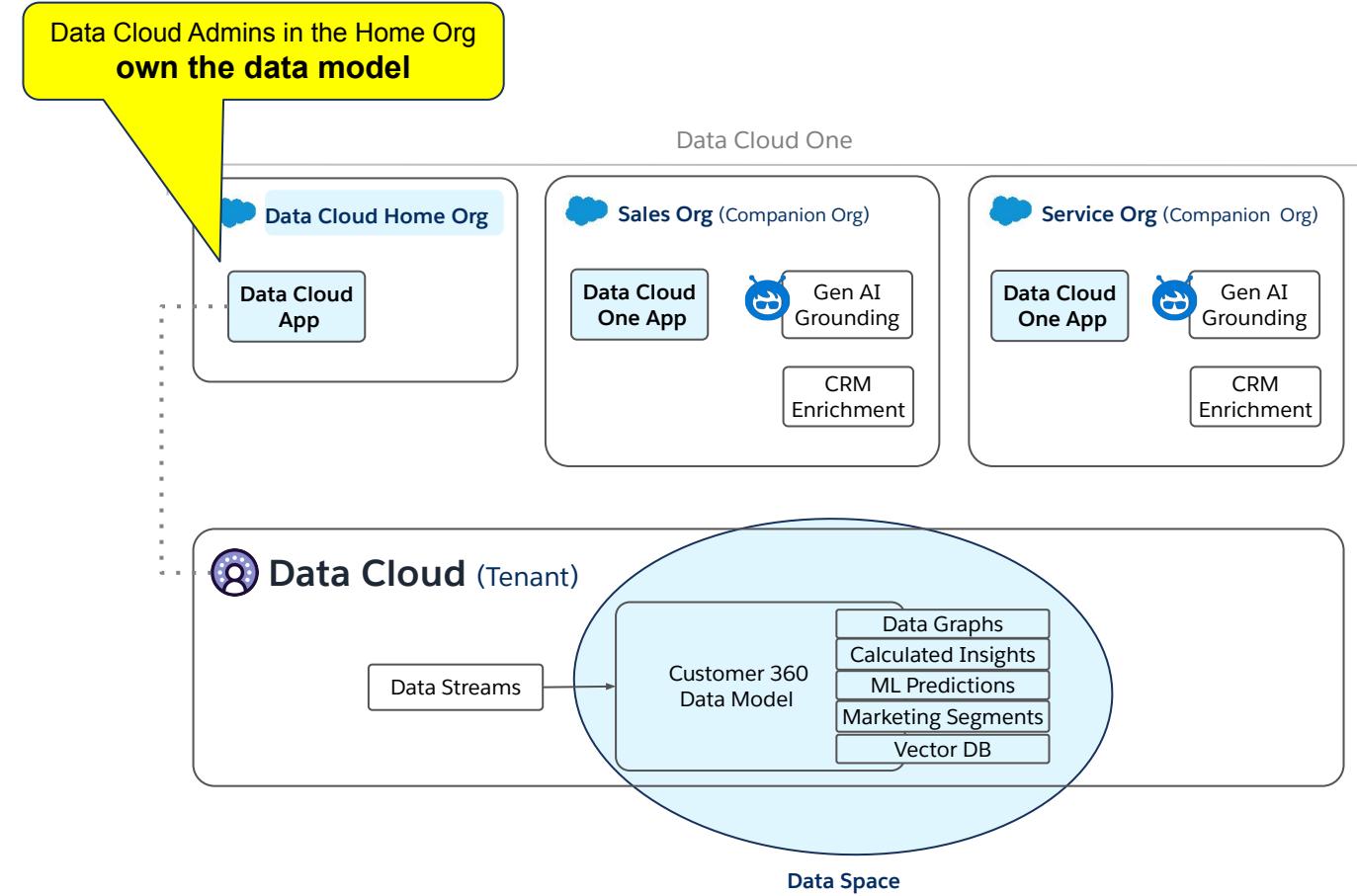
Data Cloud Data Model



Data Cloud Home in an Existing Org



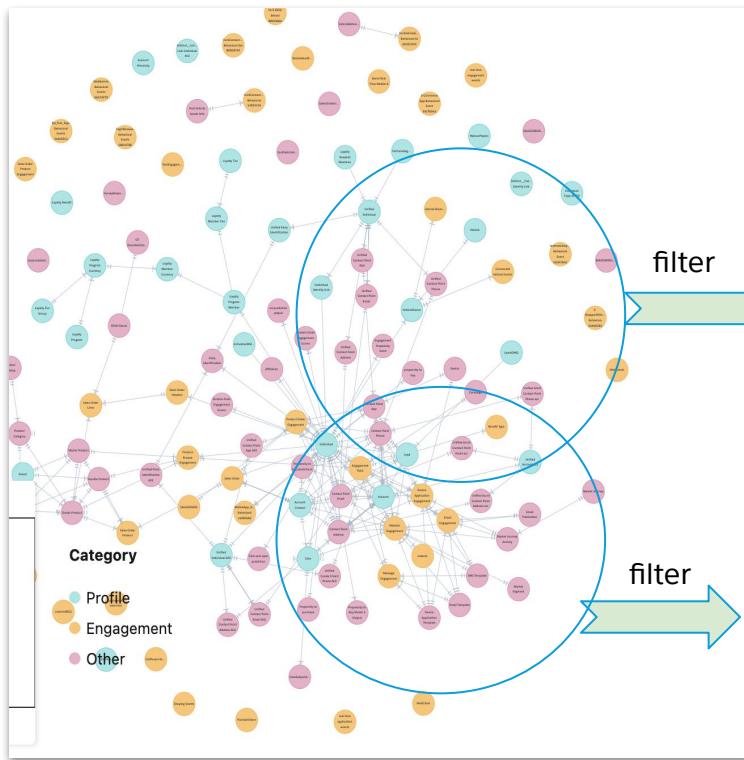
Data Cloud Home in a Dedicated Org



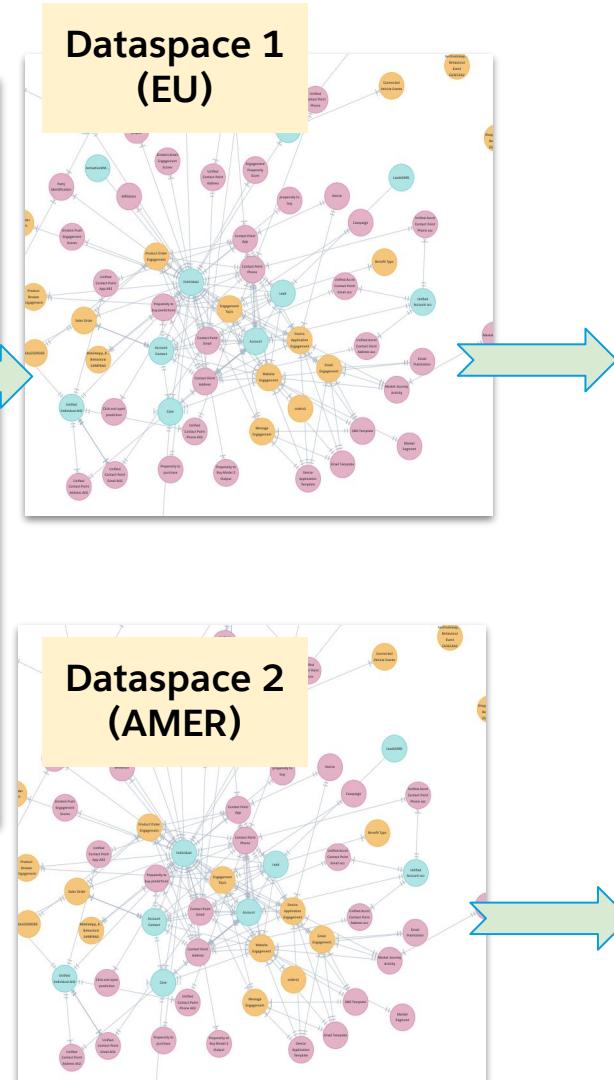
Data Spaces



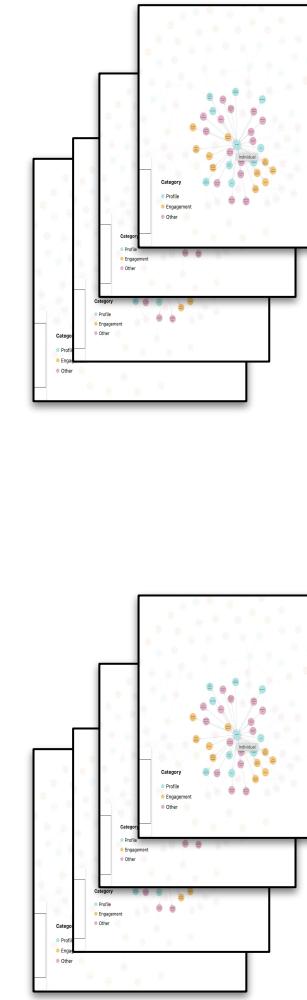
Enterprise Data Model



Organizational Data Models



Unified Profiles / Data Graphs



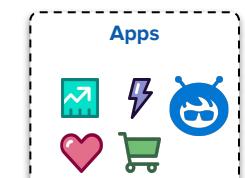
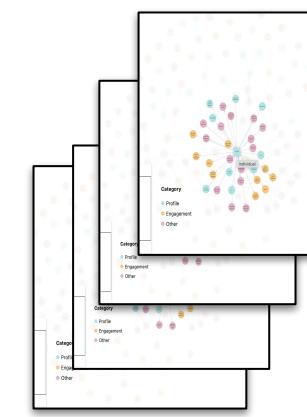
Apps

Contextual LLM Prompts

Relevant context for applications and agents



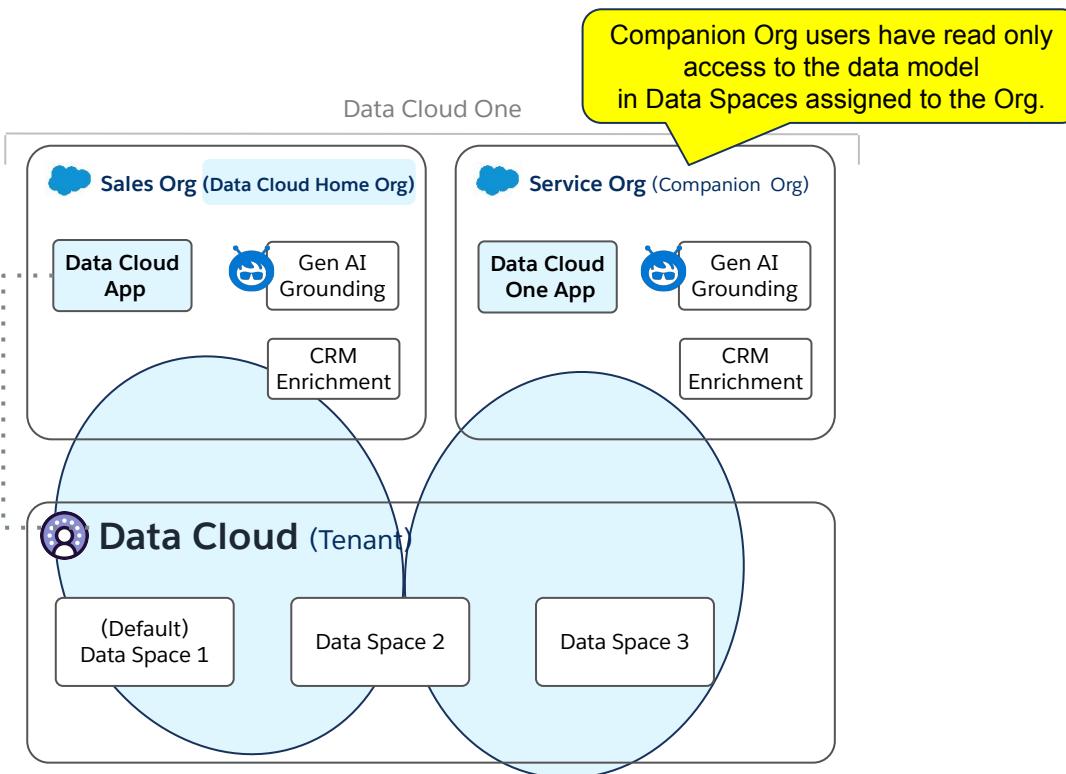
Profile: X
FirstName
LastName
Address
Last 4 purchase
Last 10 visits
LTV: Score



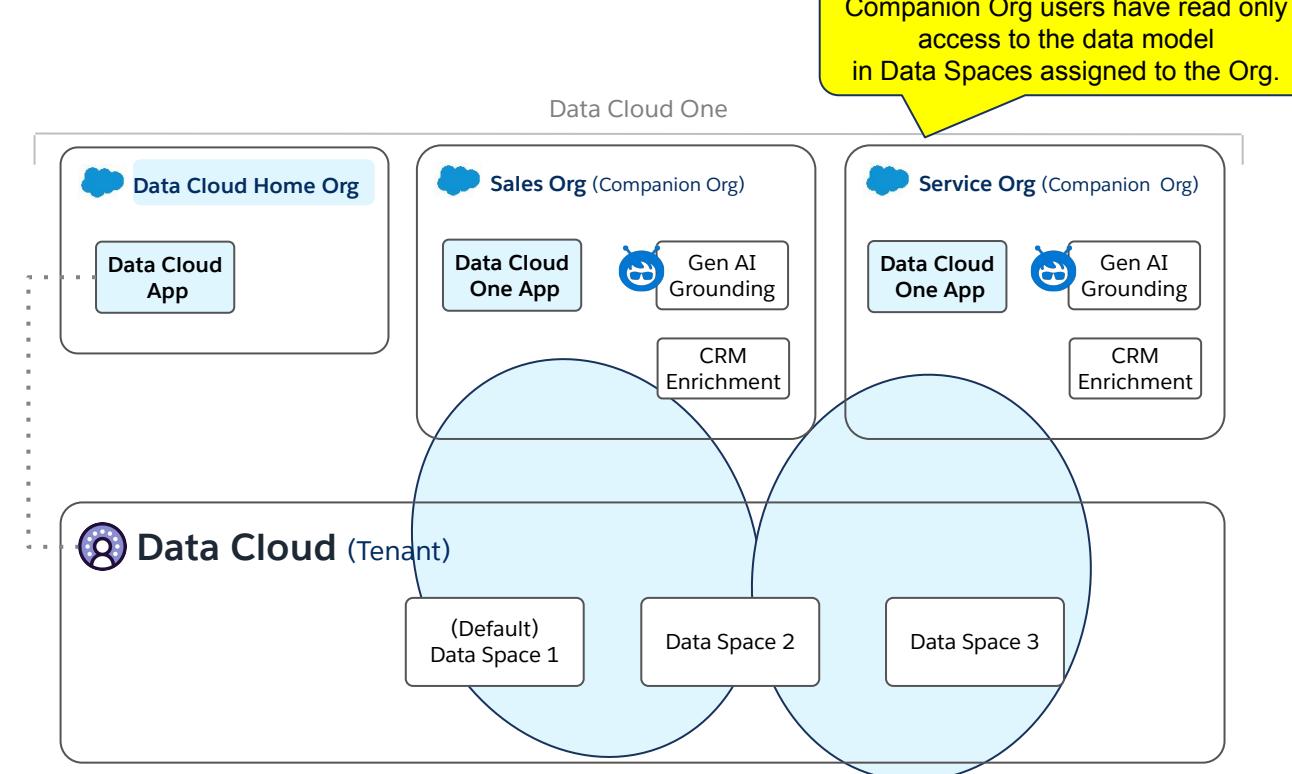
Data Cloud One (Data Spaces)



Data Cloud Home in an Existing Org



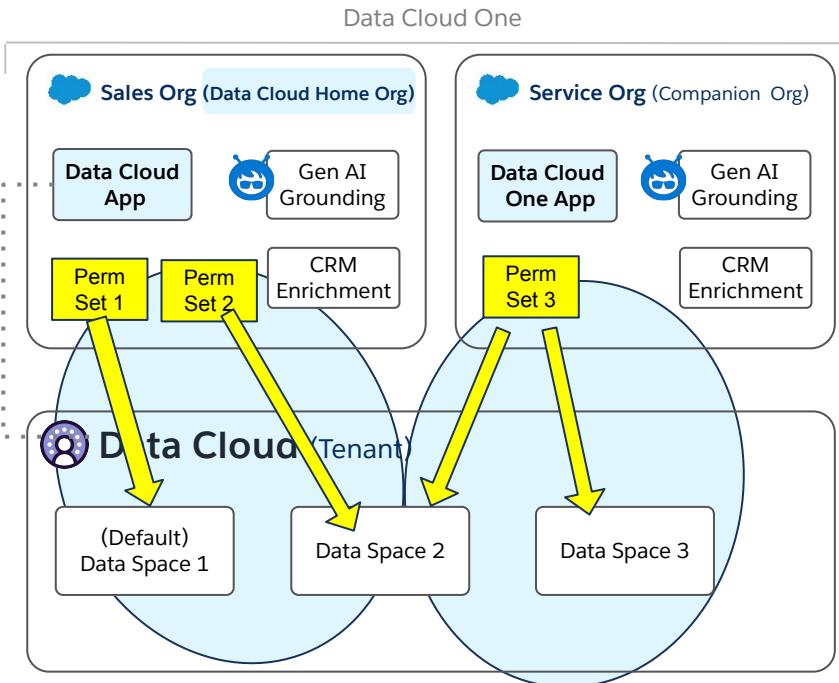
Data Cloud Home in a Dedicated Org



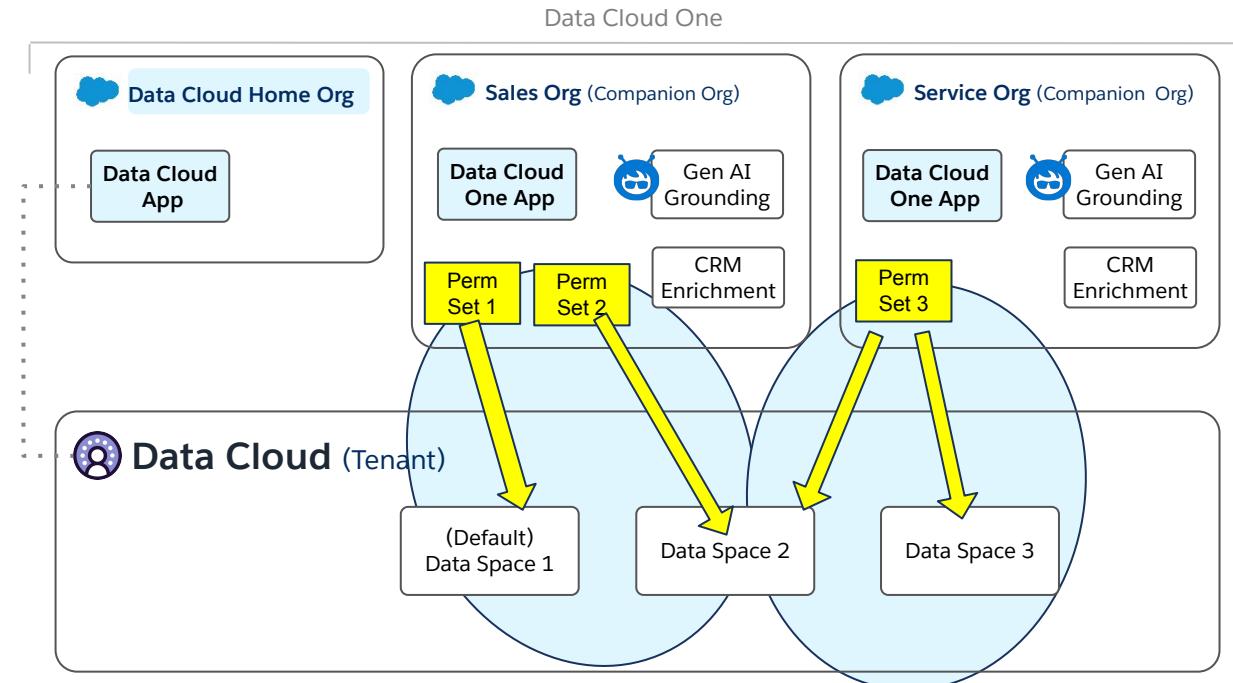
Data Cloud One (User Permissions)



Data Cloud Home in an Existing Org



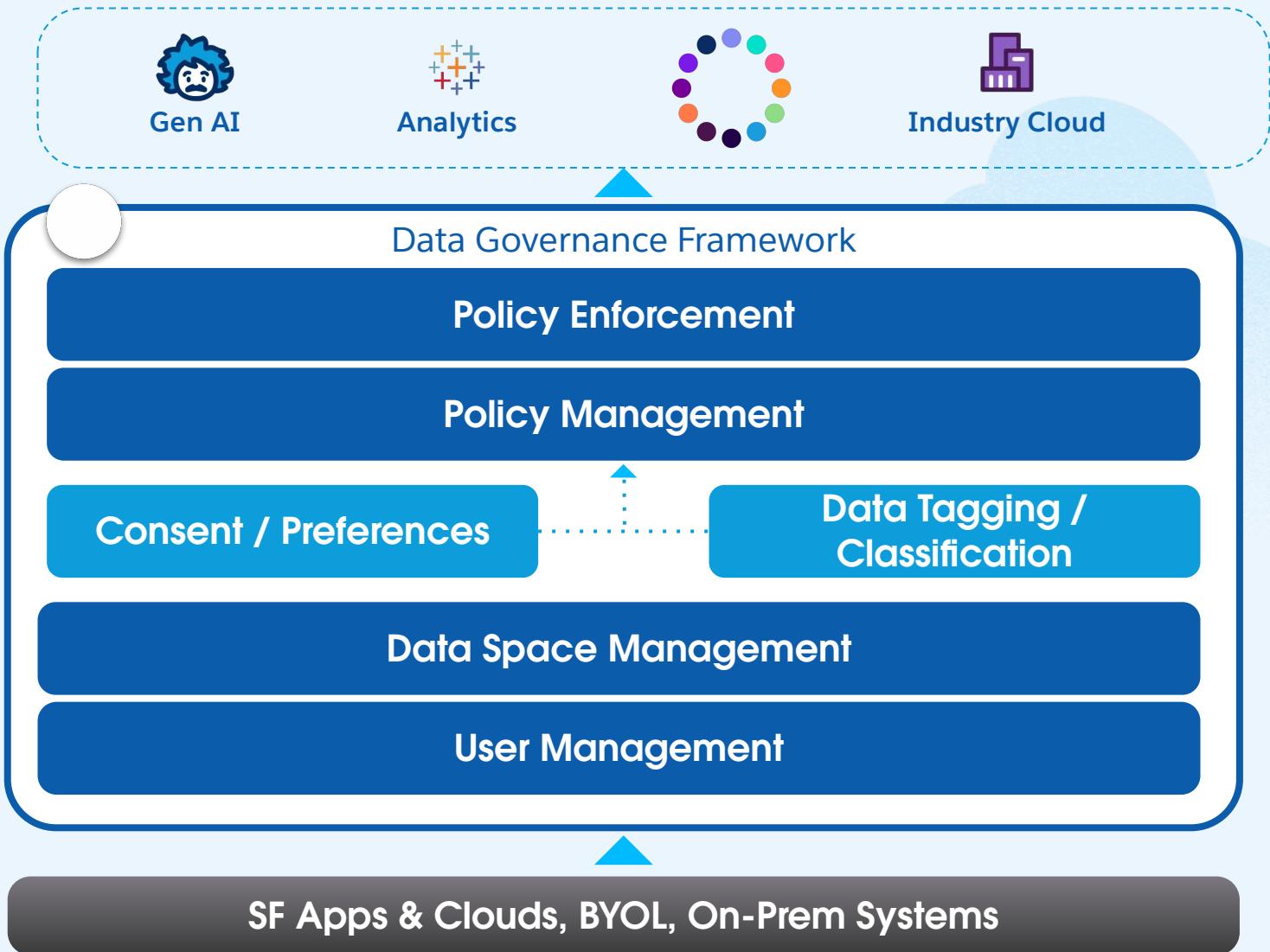
Data Cloud Home in a Dedicated Org



Data Cloud's Approach to Governance



Alation Collibra

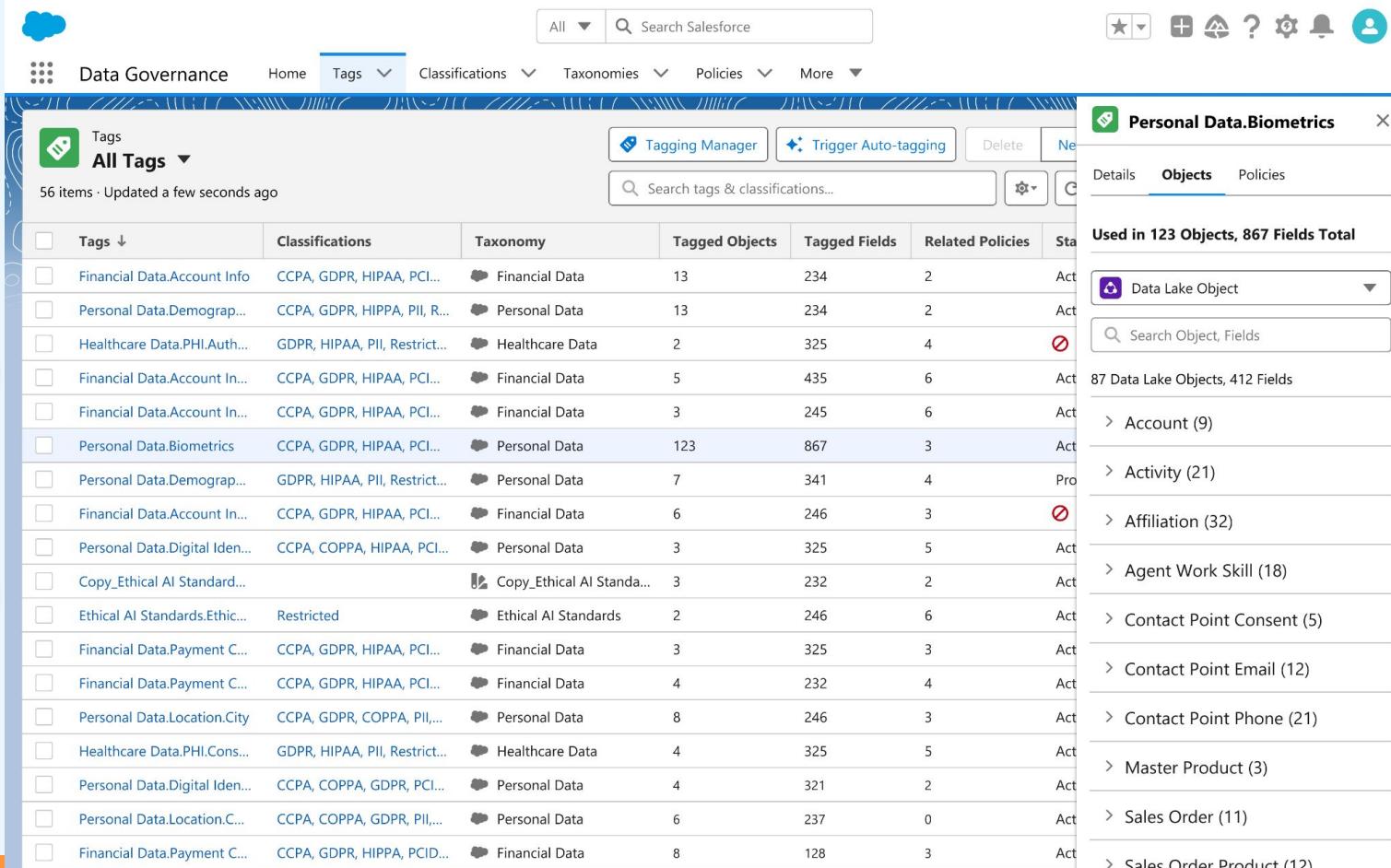


Data Cloud Tagging and Classification

Out of box and Custom Taxonomies

AI Tagging Recommendations

Tag Propagation



The screenshot shows the Salesforce Data Governance interface. The top navigation bar includes links for Home, Tags, Classifications, Taxonomies, Policies, and More. The main content area is titled "Tags" and "All Tags". It displays a table with 56 items, updated a few seconds ago. The columns are: Tags (with a sort arrow), Classifications, Taxonomy, Tagged Objects, Tagged Fields, Related Policies, and Status. The table lists various tags such as "Financial Data.Account Info", "Personal Data.Biometrics", and "Healthcare Data.PHI.Auth...". To the right of the table, there is a sidebar for "Personal Data.Biometrics" which shows it is used in 123 objects and 867 fields total. It includes sections for Details, Objects (which is selected), and Policies. The "Objects" section lists "Used in 123 Objects, 867 Fields Total" and provides a breakdown by object type like Account, Activity, etc.

Tags	Classifications	Taxonomy	Tagged Objects	Tagged Fields	Related Policies	Status
Financial Data.Account Info	CCPA, GDPR, HIPAA, PCI...	Financial Data	13	234	2	Active
Personal Data.Demograp...	CCPA, GDPR, HIPPA, PII, R...	Personal Data	13	234	2	Active
Healthcare Data.PHI.Auth...	GDPR, HIPAA, PII, Restrict...	Healthcare Data	2	325	4	Active
Financial Data.Account In...	CCPA, GDPR, HIPAA, PCI...	Financial Data	5	435	6	Active
Financial Data.Account In...	CCPA, GDPR, HIPAA, PCI...	Financial Data	3	245	6	Active
Personal Data.Biometrics	CCPA, GDPR, HIPAA, PCI...	Personal Data	123	867	3	Active
Personal Data.Demograp...	GDPR, HIPAA, PII, Restrict...	Personal Data	7	341	4	Prohibited
Financial Data.Account In...	CCPA, GDPR, HIPAA, PCI...	Financial Data	6	246	3	Prohibited
Personal Data.Digital Iden...	CCPA, COPPA, HIPAA, PCI...	Personal Data	3	325	5	Active
Copy_Ethical AI Standard...	Copy_Ethical AI Standard...	Ethical AI Standards	3	232	2	Active
Ethical AI Standards.Ethic...	Restricted	Ethical AI Standards	2	246	6	Active
Financial Data.Payment C...	CCPA, GDPR, HIPAA, PCI...	Financial Data	3	325	3	Active
Financial Data.Payment C...	CCPA, GDPR, HIPAA, PCI...	Financial Data	4	232	4	Active
Personal Data.Location.City	CCPA, GDPR, COPPA, PII, ...	Personal Data	8	246	3	Active
Healthcare Data.PHI.Cons...	GDPR, HIPAA, PII, Restrict...	Healthcare Data	4	325	5	Active
Personal Data.Digital Iden...	CCPA, COPPA, GDPR, PCI...	Personal Data	4	321	2	Active
Personal Data.Location.C...	CCPA, COPPA, GDPR, PII, ...	Personal Data	6	237	0	Active
Financial Data.Payment C...	CCPA, GDPR, HIPPA, PCID...	Financial Data	8	128	3	Active

Data Cloud Granular Security

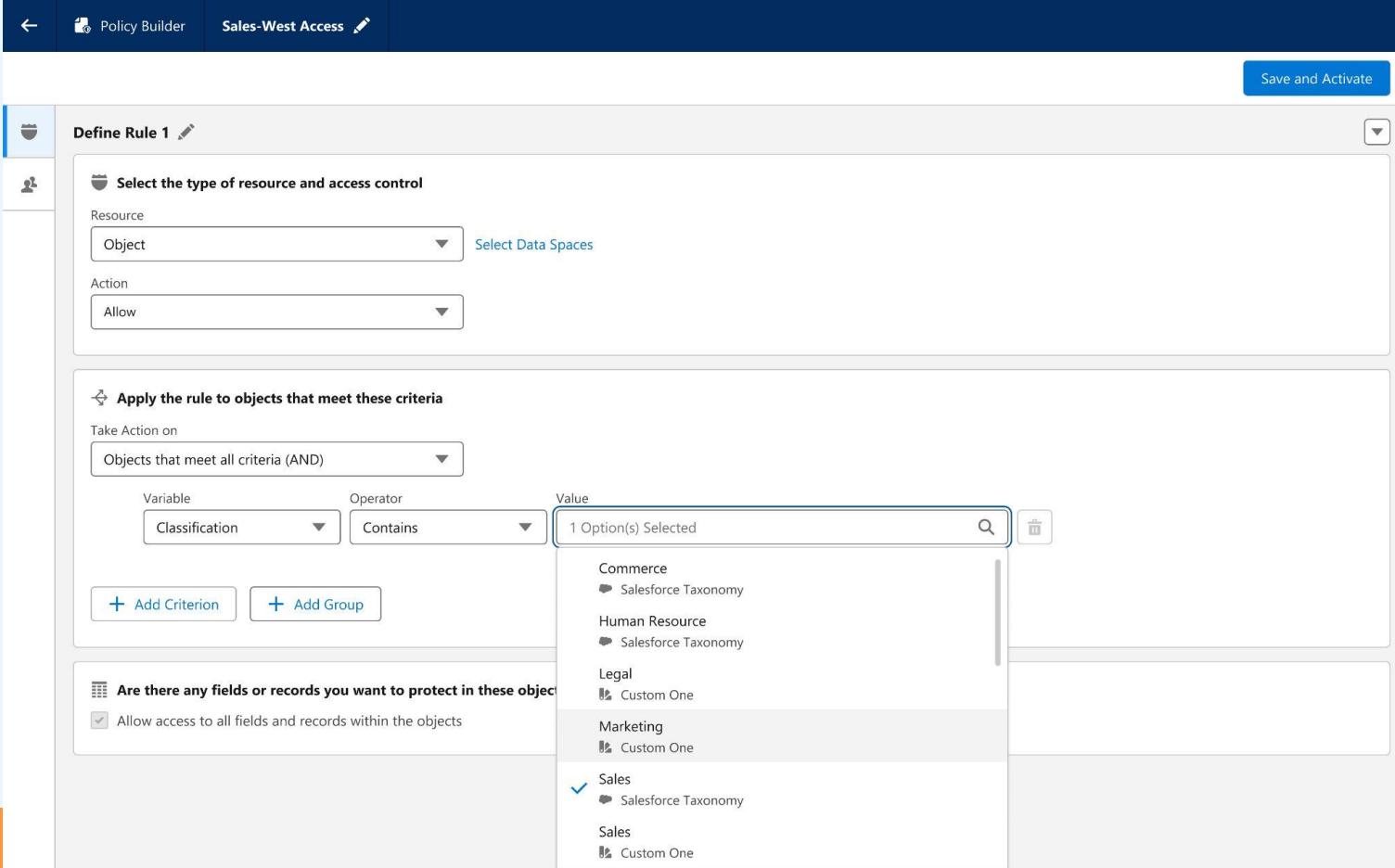
High level feature overview

Data Security Policy Authoring

Admins can write access control policies at the object and field level using tags and classifications

Enforcement

API and DC UI surface areas will honor access control policies, applying user context



The screenshot shows the Salesforce Policy Builder interface for creating a granular security rule. The top navigation bar includes 'Policy Builder' and 'Sales-West Access' with a pencil icon, and a 'Save and Activate' button on the right.

The main area is titled 'Define Rule 1' with a pencil icon. It starts with a step: 'Select the type of resource and access control'. Under 'Resource', 'Object' is selected from a dropdown, and 'Allow' is selected under 'Action'. A 'Select Data Spaces' link is available.

The next section, 'Apply the rule to objects that meet these criteria', shows 'Objects that meet all criteria (AND)' selected under 'Take Action on'. It includes fields for 'Variable' (set to 'Classification'), 'Operator' (set to 'Contains'), and 'Value' (a search bar containing '1 Option(s) Selected'). Below these are buttons for '+ Add Criterion' and '+ Add Group'.

The final section, 'Are there any fields or records you want to protect in these objects?', contains a checkbox for 'Allow access to all fields and records within the objects'.

A detailed sidebar on the right lists various classifications and taxonomies:

- Commerce
 - Salesforce Taxonomy
- Human Resource
 - Salesforce Taxonomy
- Legal
 - Custom One
- Marketing
 - Custom One
- Sales
 - Salesforce Taxonomy
- Sales
 - Custom One

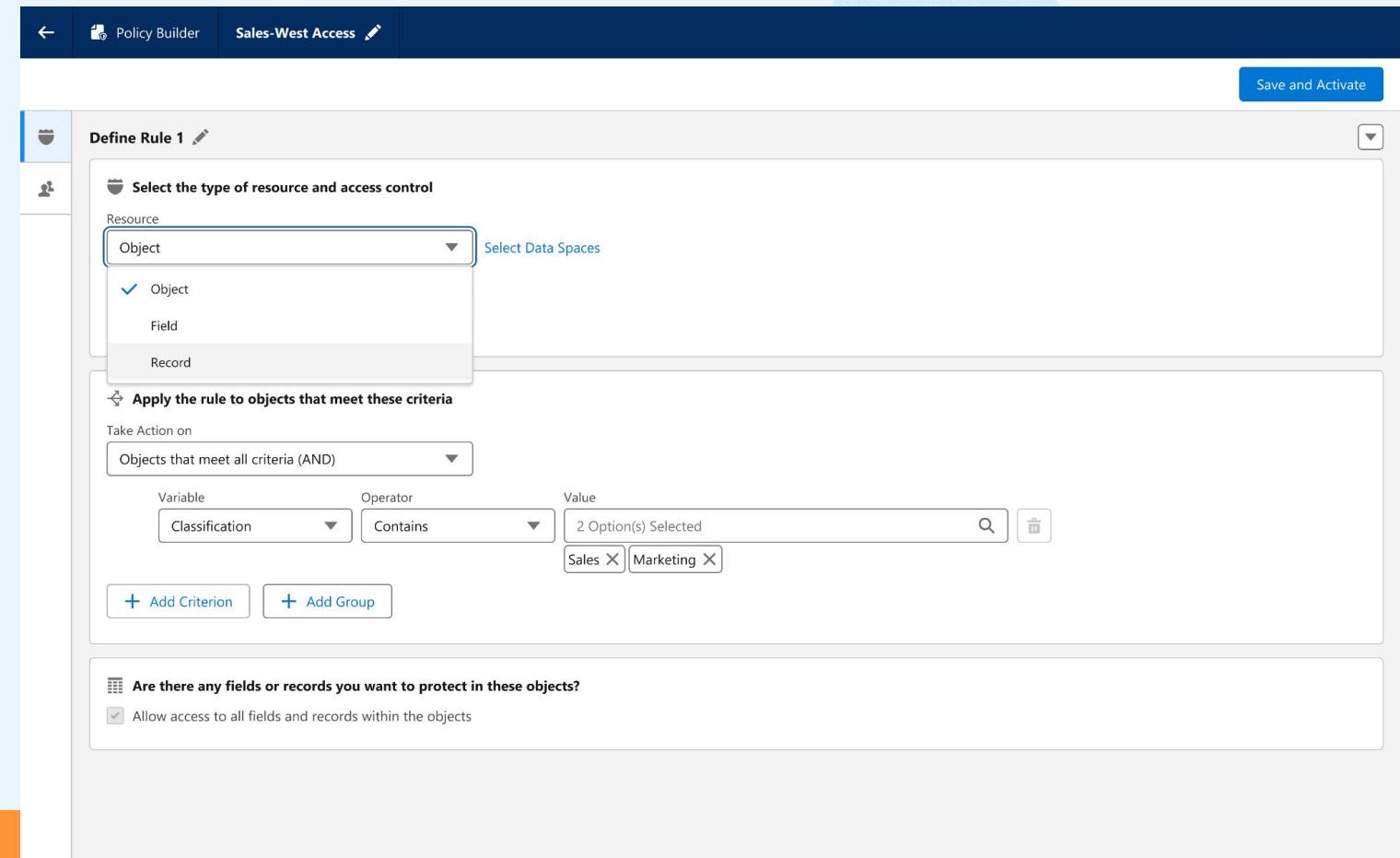
Security Policy Authoring

Secure your objects using simple to use and scalable platform

Object Level Policies (OLS)

Field Level Policies (FLS)

Row Level Policies (RLS)



The screenshot shows the Salesforce Policy Builder interface for defining security rules. The top navigation bar includes 'Policy Builder' and 'Sales-West Access'. A 'Save and Activate' button is located in the top right corner.

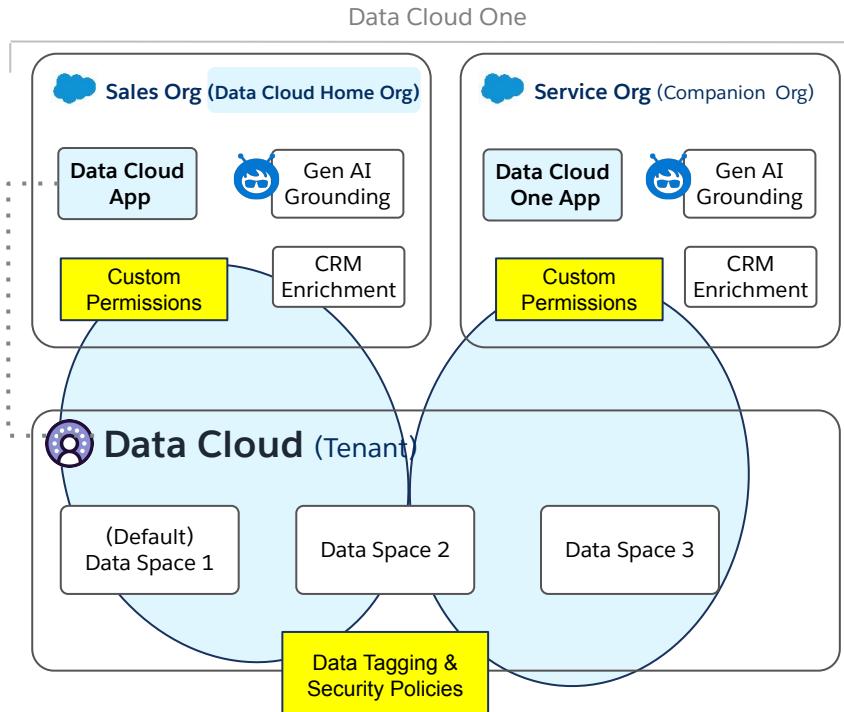
The main area is titled 'Define Rule 1' and contains the following sections:

- Select the type of resource and access control:** Under 'Resource', 'Object' is selected. A dropdown menu also lists 'Field' and 'Record'. A link 'Select Data Spaces' is present.
- Apply the rule to objects that meet these criteria:** Under 'Take Action on', 'Objects that meet all criteria (AND)' is selected. Below this, a criterion is defined: Variable 'Classification' (Contains '2 Option(s) Selected'), Operator 'Contains', Value 'Sales X Marketing X'.
- Are there any fields or records you want to protect in these objects?**: A checkbox 'Allow access to all fields and records within the objects' is checked.

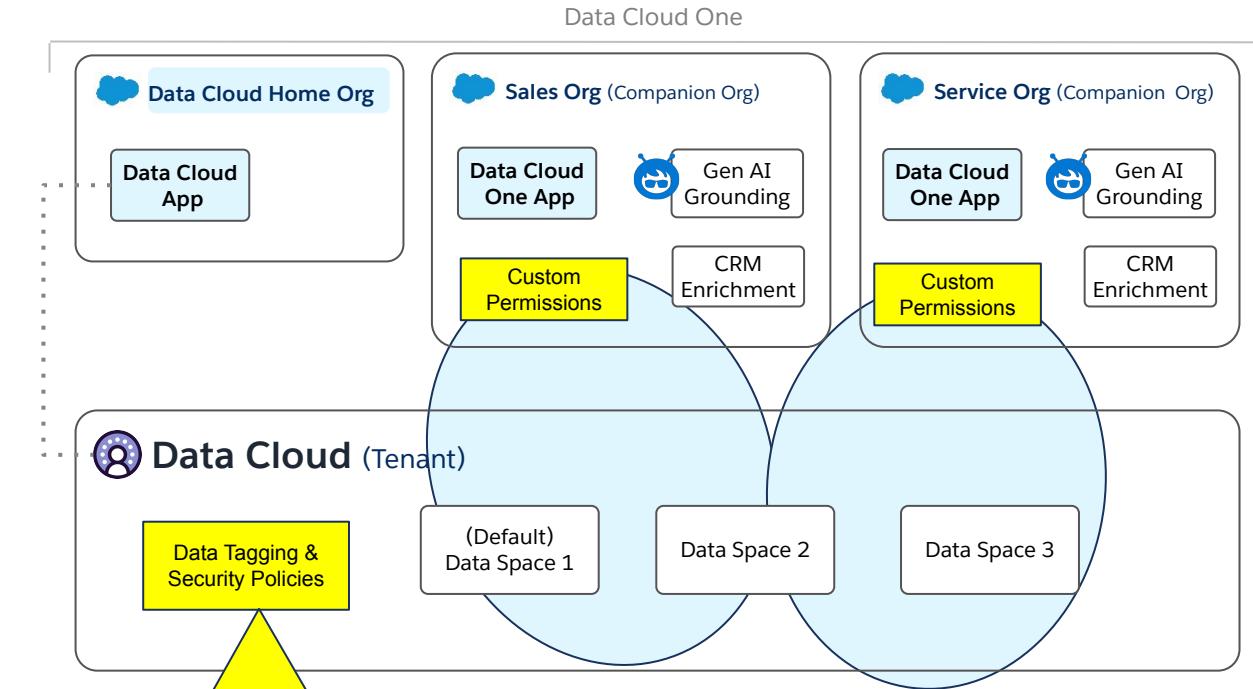
Data Cloud One (Data Tagging & Security Policies)



Data Cloud Home in an Existing Org



Data Cloud Home in a Dedicated Org

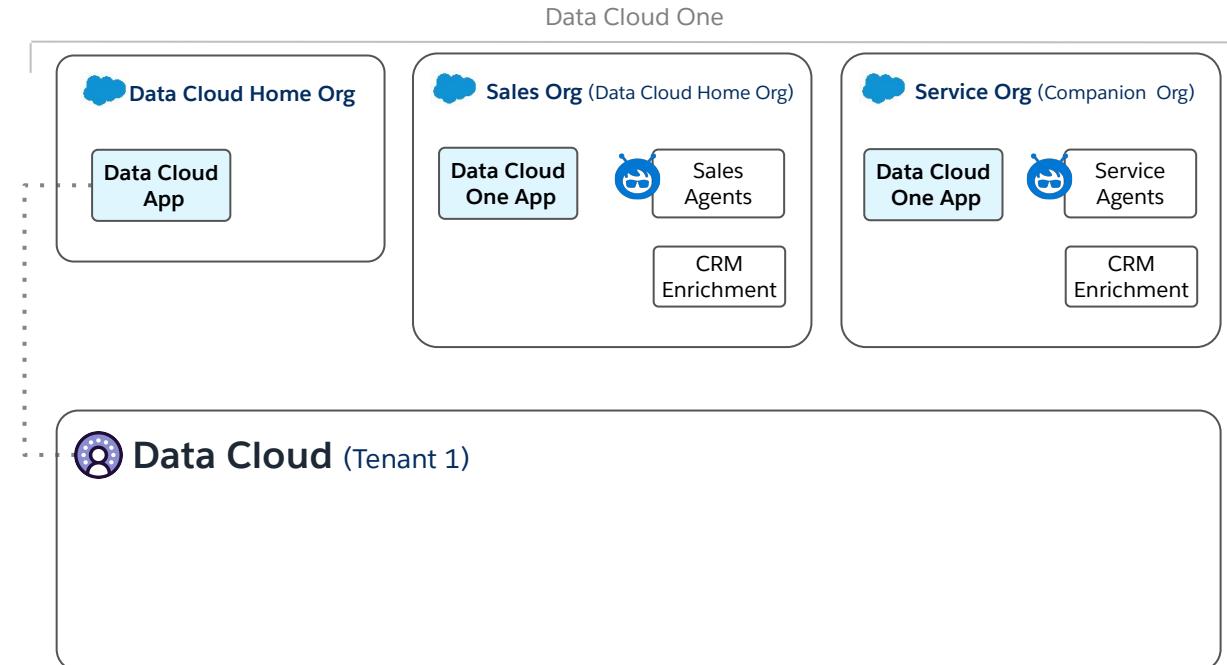


Fine-grained Security Policies
will be authored in the Home Org and
in Companion Orgs

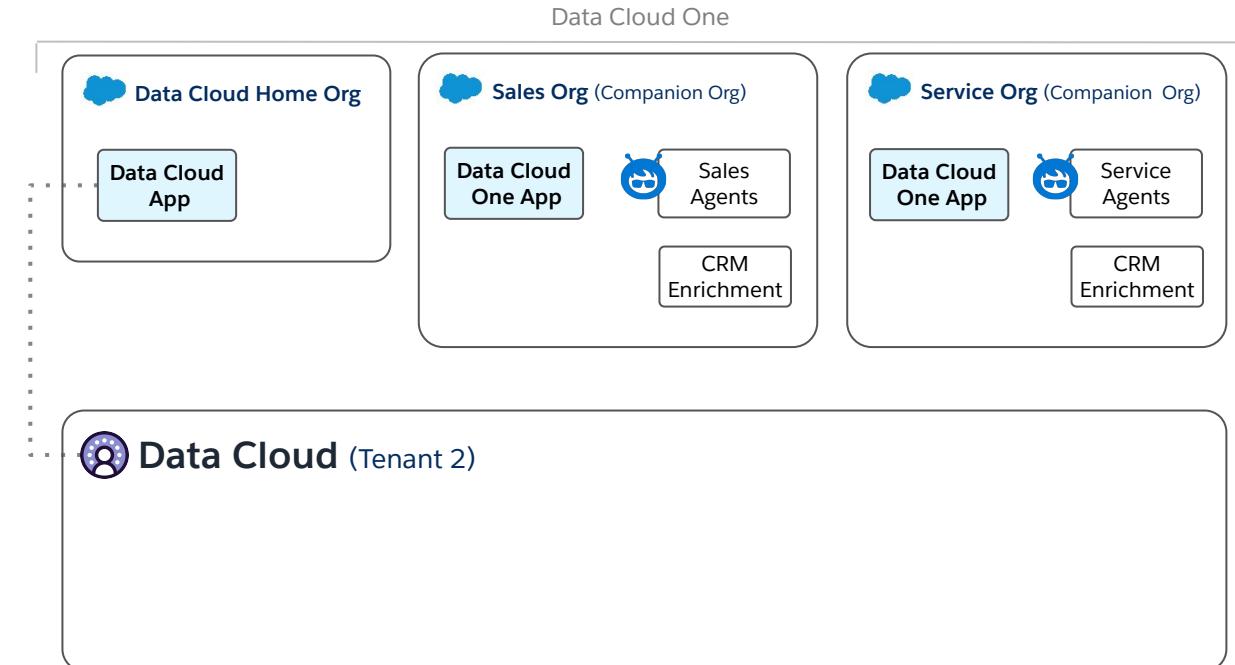
[Customer Example] Separate Data Cloud Environments



Business Unit / Division / Geo 1



Business Unit / Division / Geo 2

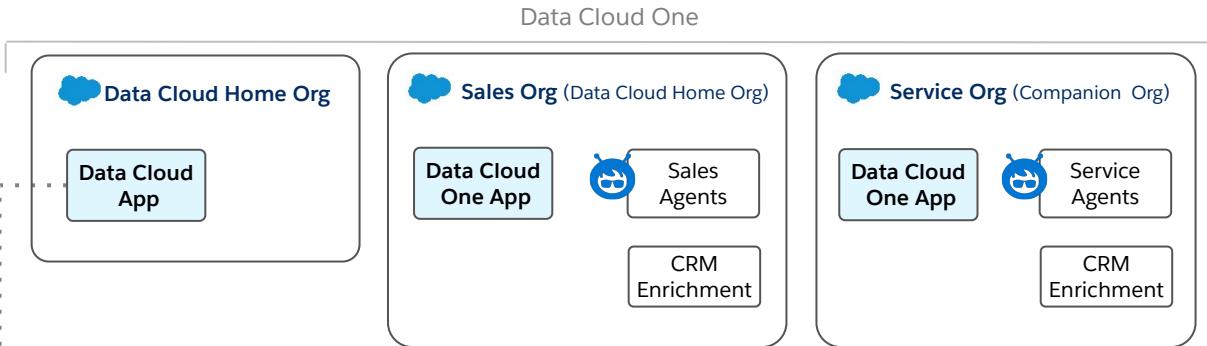


[Customer Example] Separate Data Cloud Environments

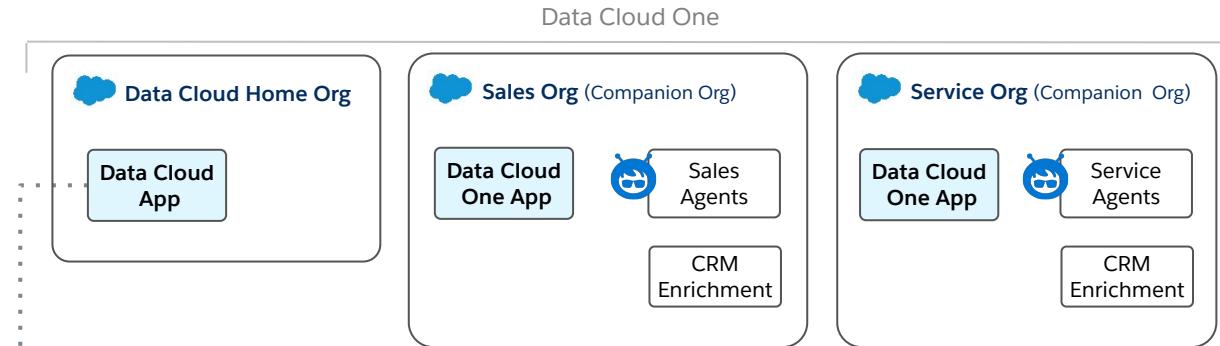
FUTURE



Business Unit / Division / Geo 1



Business Unit / Division / Geo 2



Data Cloud (Tenant 1)

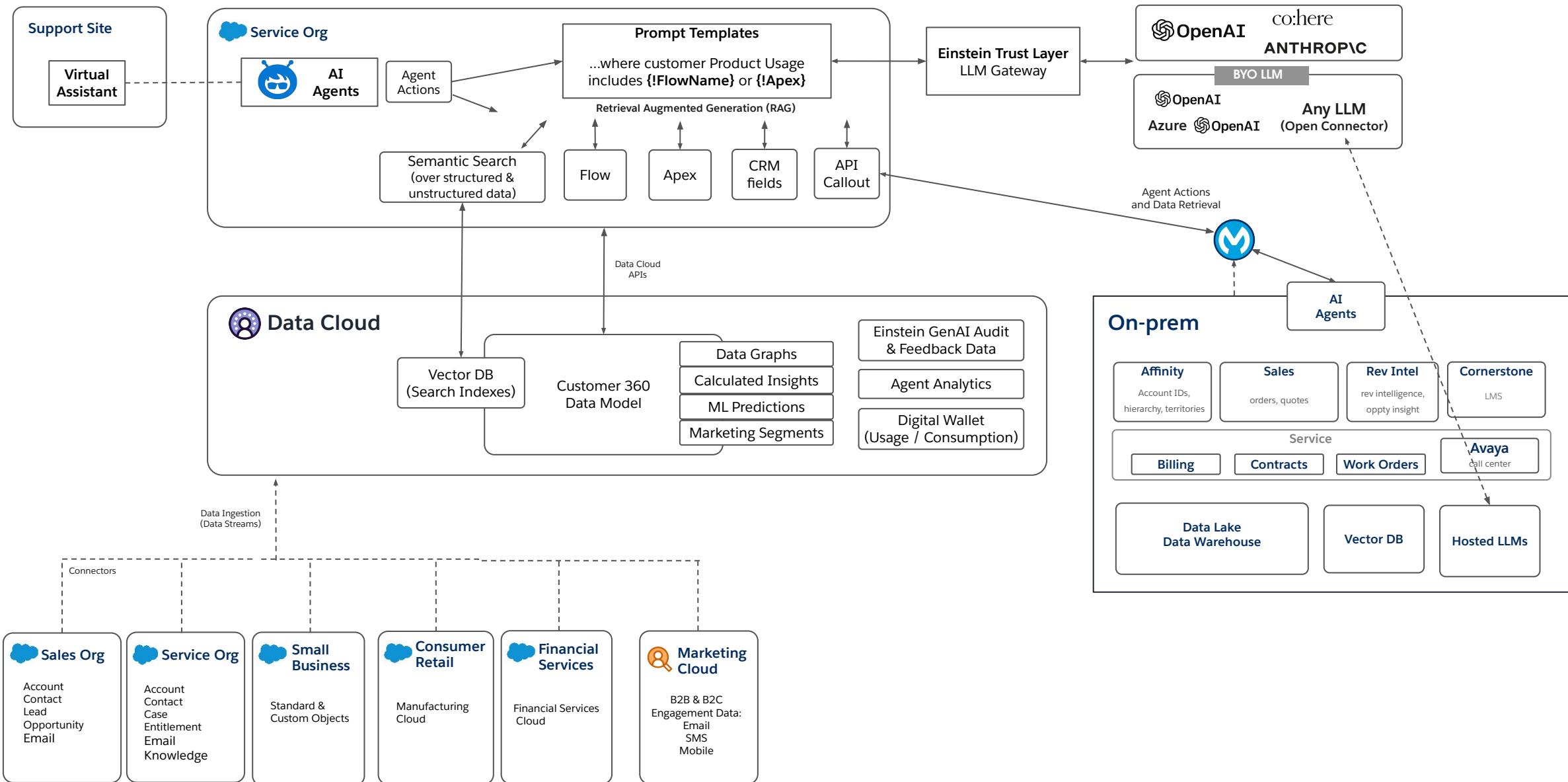


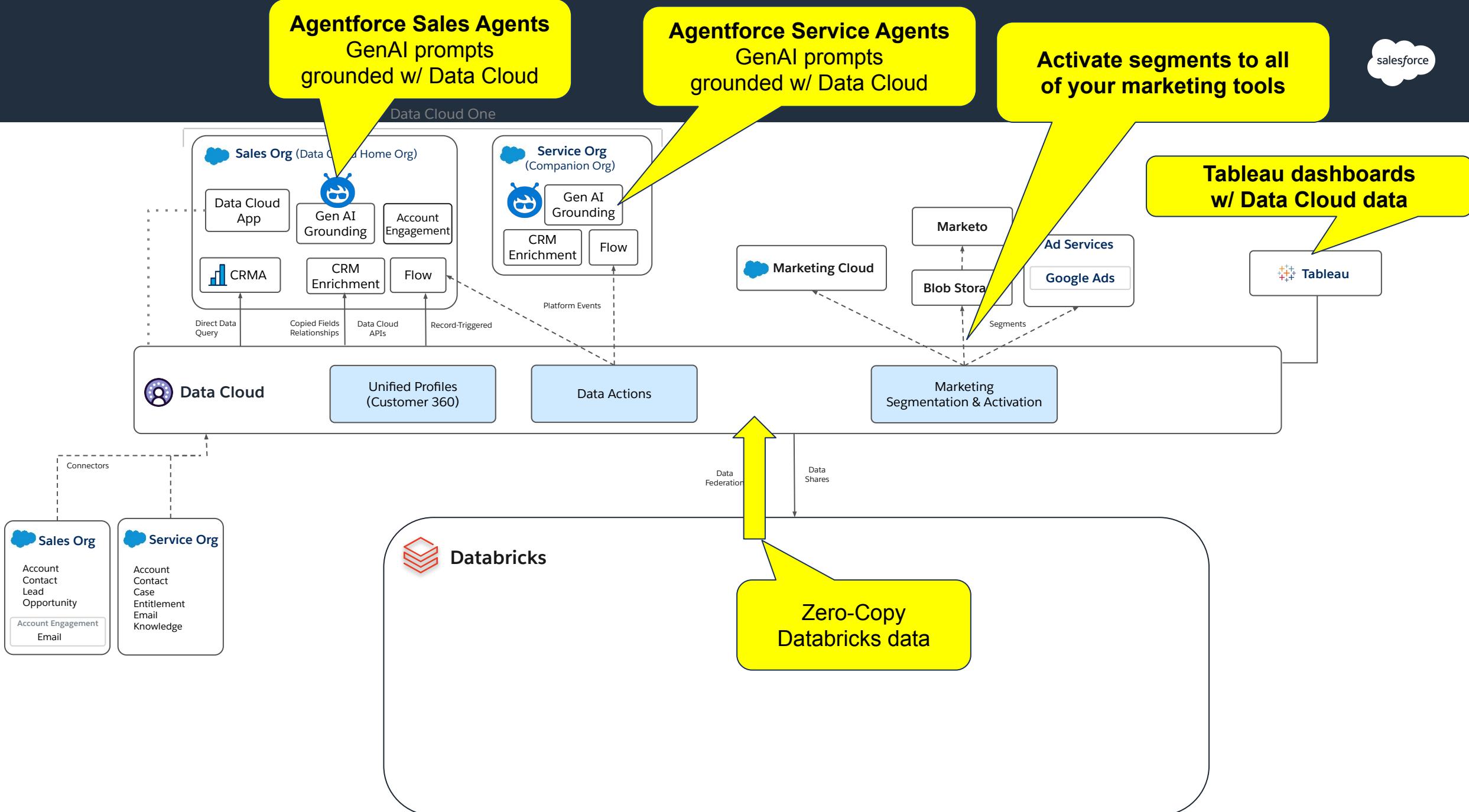
Data Cloud (Tenant 2)

Data Cloud to Data Cloud zero-copy data sharing

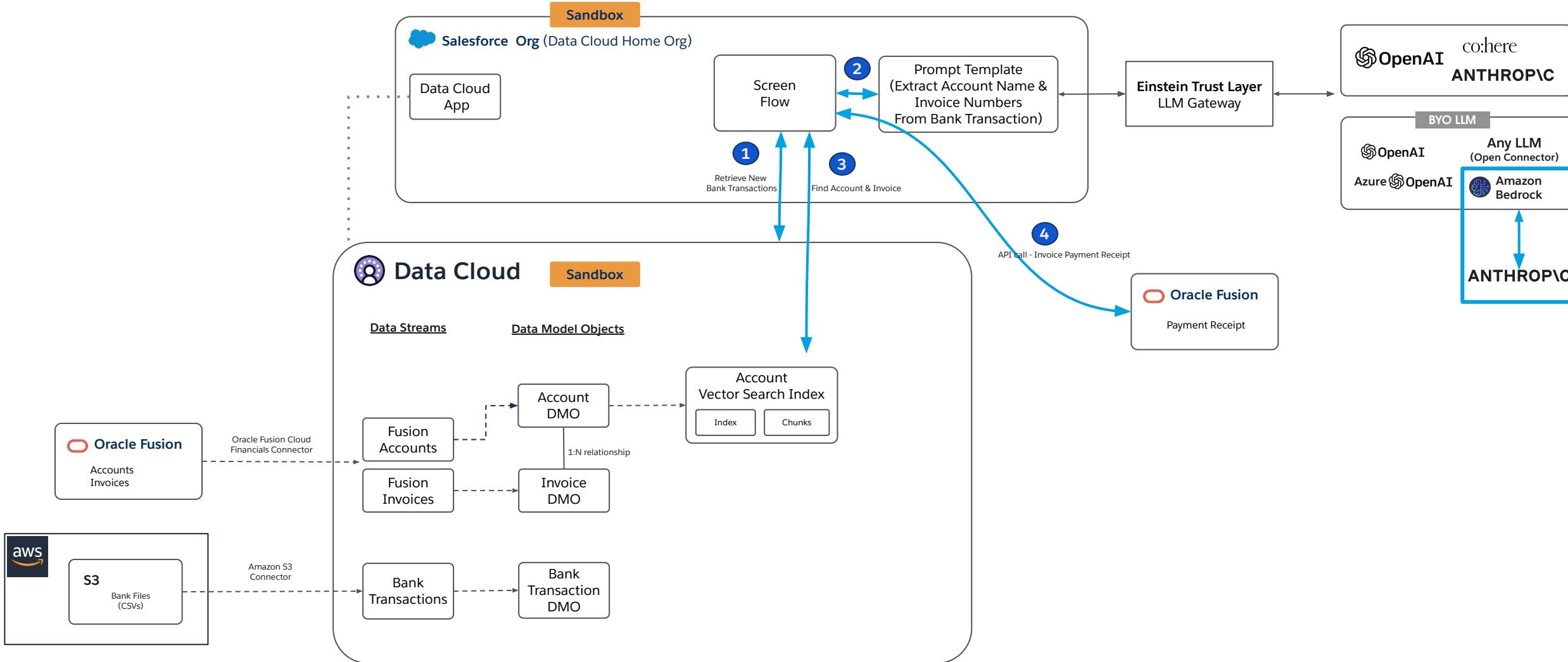
FUTURE

[Customer Example] Salesforce + On-prem Data & AI





[Customer Example] Finance App - automate payment receipts



DevOps / Deployment Options



Methods for configuring Data Cloud and Agents



Salesforce Admin UI

Salesforce admins use declarative and low-code tools to configure Data Cloud and Agents through the Salesforce UI.

Deploy with Metadata API

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE package SYSTEM "http://www.w3.org/2005/05/xmlmime">
<package>
<version>59.0</version>
<id>00D8000000000047v2</id>
<name>C980_Data_Cloud</name>
<type>Data Cloud</type>
<description>C980 Data Cloud - Case Updated</description>
<files>
<file name="C980_Data_Cloud_Case_Updated.flow-meta.xml" type="Flow Meta Data" id="00E8000000000047v2" version="59.0" encoding="UTF-8" />
</files>
</package>
```

Supported Data Cloud Feature Metadata can be retrieved and deployed using the Salesforce Metadata API.

The Metadata API will support Agentforce components.

Deploy with Packaging

Packages			
Search by package name or ID			
Count	Metadata Package ID	Versions	Subscribers
294	BofPerMan-2G	2GPM Versions	BofPerMan-2G Subscribers
7	2GPM	2GPM Versions	2GPM Subscribers
1	Old 2GPM	Old 2GPM Versions	Old 2GPM Subscribers

Org Type	Metadata Package ID	Subscriber Org Status (Active or Inactive)	Subscriber Org Type (Production or Sandbox)
Select an option			
Count	Metadata Package ID	Subscriber Org Status (Active or Inactive)	Subscriber Org Type (Production or Sandbox)
212	BofPerMan-2G	Demo	Sandbox
48	BofPerMan-2G	Active	Production
33	BofPerMan-2G	Free	Production
5	2GPM	Free	Production
1	2GPM	Trial	Production
1	BofPerMan-2G	Trial	Production
1	Old 2GPM	Free	Production
1	2GPM	Trial	Sandbox

Supported Data Cloud Features can be deployed using **Data Kits** within Change Sets or Salesforce Packaging.

Agentforce components will be supported in Change Sets and Packaging.

Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes



Single Org, First Data Cloud Implementation

② Salesforce Sandbox Org created

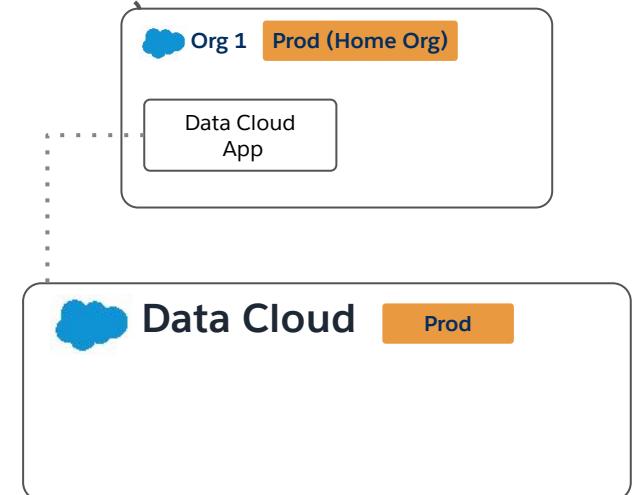
- all sandbox types supported
(Dev, Dev Pro, Partial Copy, Full Copy)

Data Cloud “DEV”



① Create Sandbox

Data Cloud “PROD”



Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes



Single Org, First Data Cloud Implementation

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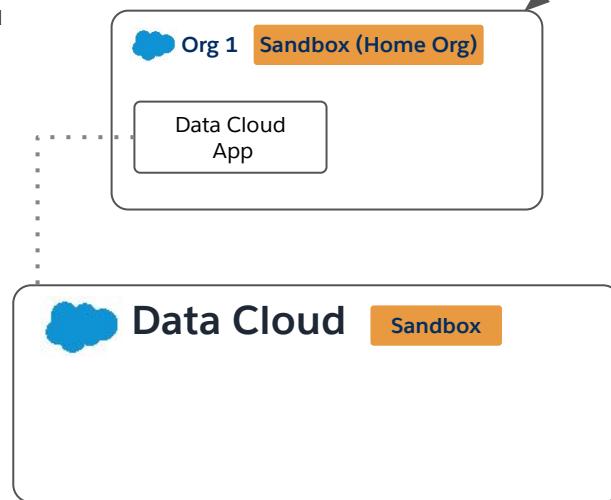
- all sandbox types supported
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③ Provision Data Cloud tenant

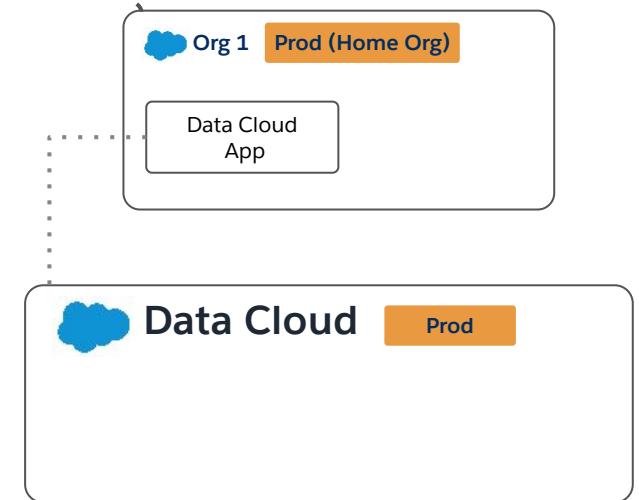
- Manual step to provision the Data Cloud Sandbox tenant under Data Cloud Setup
-> Get Started

① Create Sandbox

Data Cloud “DEV”



Data Cloud “PROD”



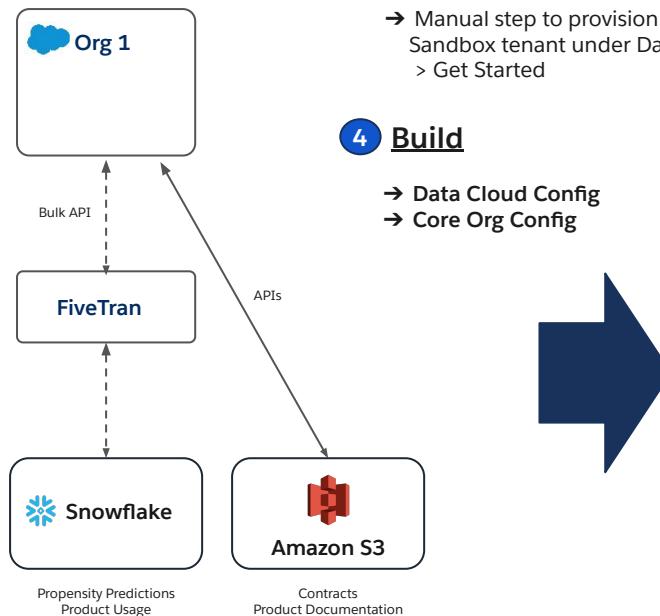
Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes



Single Org, First Data Cloud Implementation

Current



② Salesforce Sandbox Org created

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③ Provision Data Cloud tenant

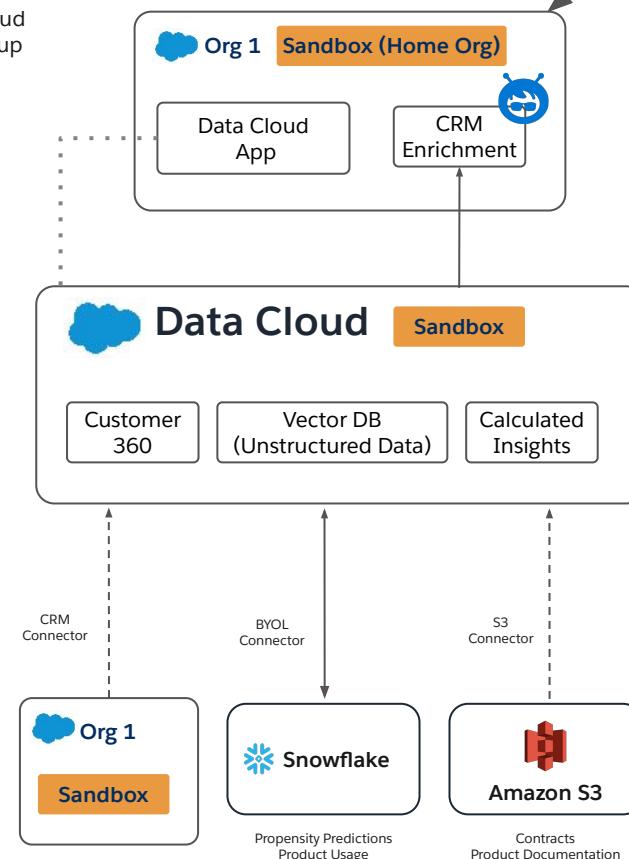
- Manual step to provision the Data Cloud Sandbox tenant under Data Cloud Setup
-> Get Started

④ Build

- Data Cloud Config
- Core Org Config

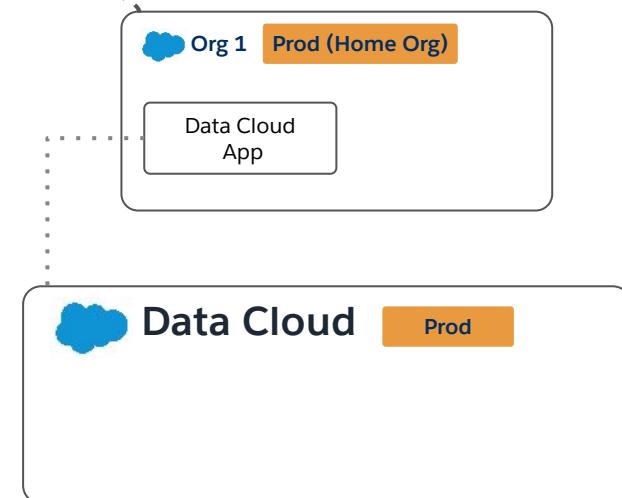


Data Cloud “DEV”



① Create Sandbox

Data Cloud “PROD”



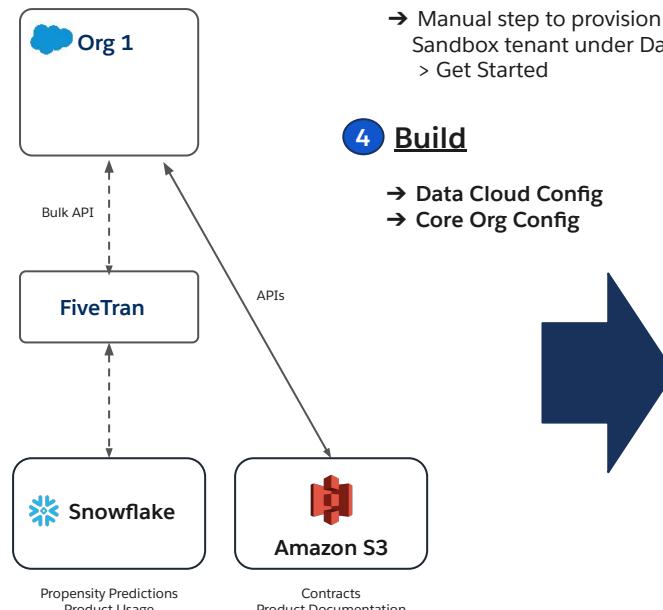
Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes



Single Org, First Data Cloud Implementation

Current



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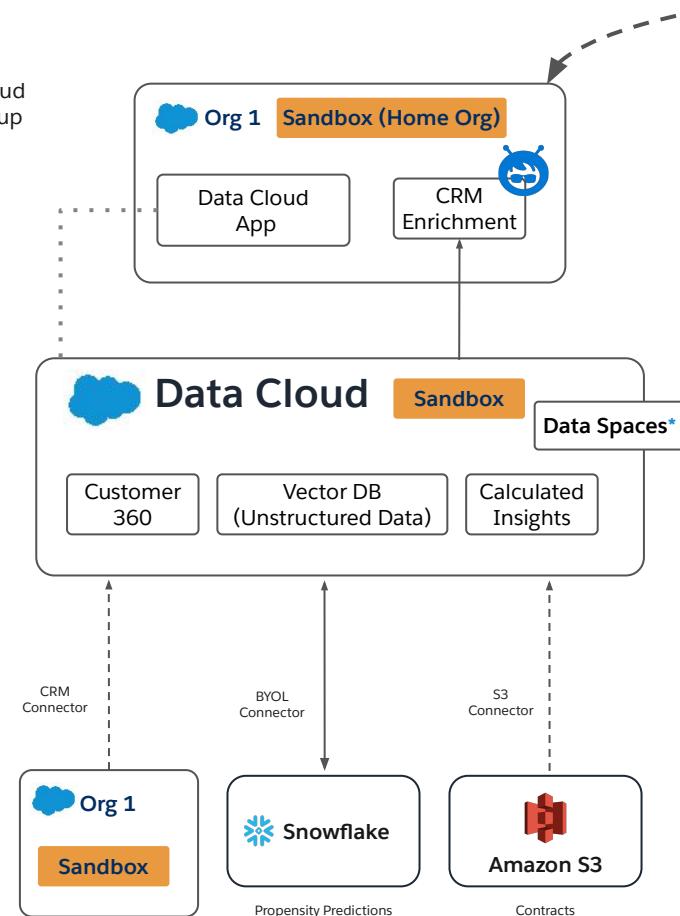
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④ Build

- Data Cloud Config
- Core Org Config

Data Cloud “DEV”



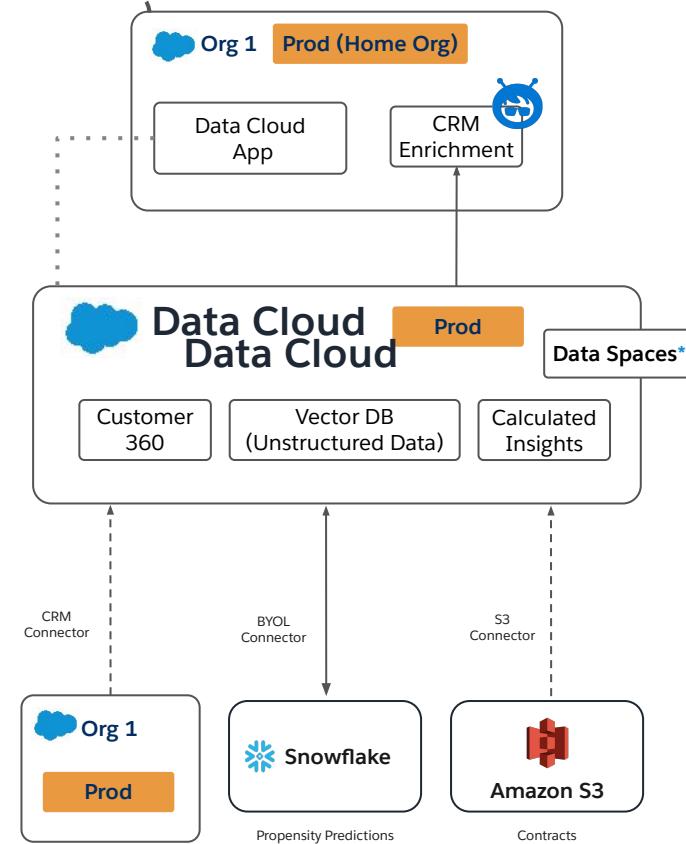
① Create Sandbox

⑤ Deploy

- Core Org Config
 - CRM Enrichment
(Apex, Flows, Lightning Pages, Copy Fields*, Related Lists*)
 - Gen AI grounding
(AI Agents, Agent Actions, Prompt Templates)
 - Data Cloud permissions
 - Depends On

- Data Cloud Config
 - Change Sets (Data Kits)
 - Packages (Data Kits)
 - **Metadata API***
 - **DevOps Center support***
 - Manual Configuration

Data Cloud “PROD”



*Future/roadmap support

*Packaging and Metadata API support for Data Cloud Copy Fields and Related Lists are roadmap items (Safe Harbor)

*Data Spaces have to be configured in Prod before deploying the data model that relies on them into Prod

Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes

Single Org, Existing Data Cloud Implementation



Data Cloud “DEV”

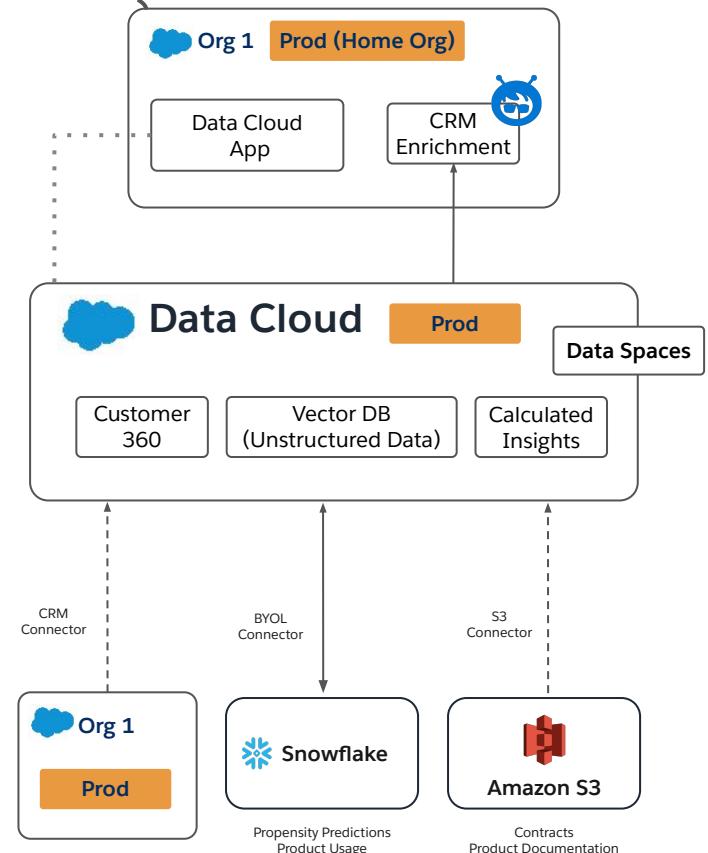


2 Salesforce Sandbox Org created

- all sandbox types supported
(Dev, Dev Pro, Partial Copy, Full Copy)

① Create Sandbox

Data Cloud “PROD”



Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes



Single Org, Existing Data Cloud Implementation

Data Cloud “DEV”

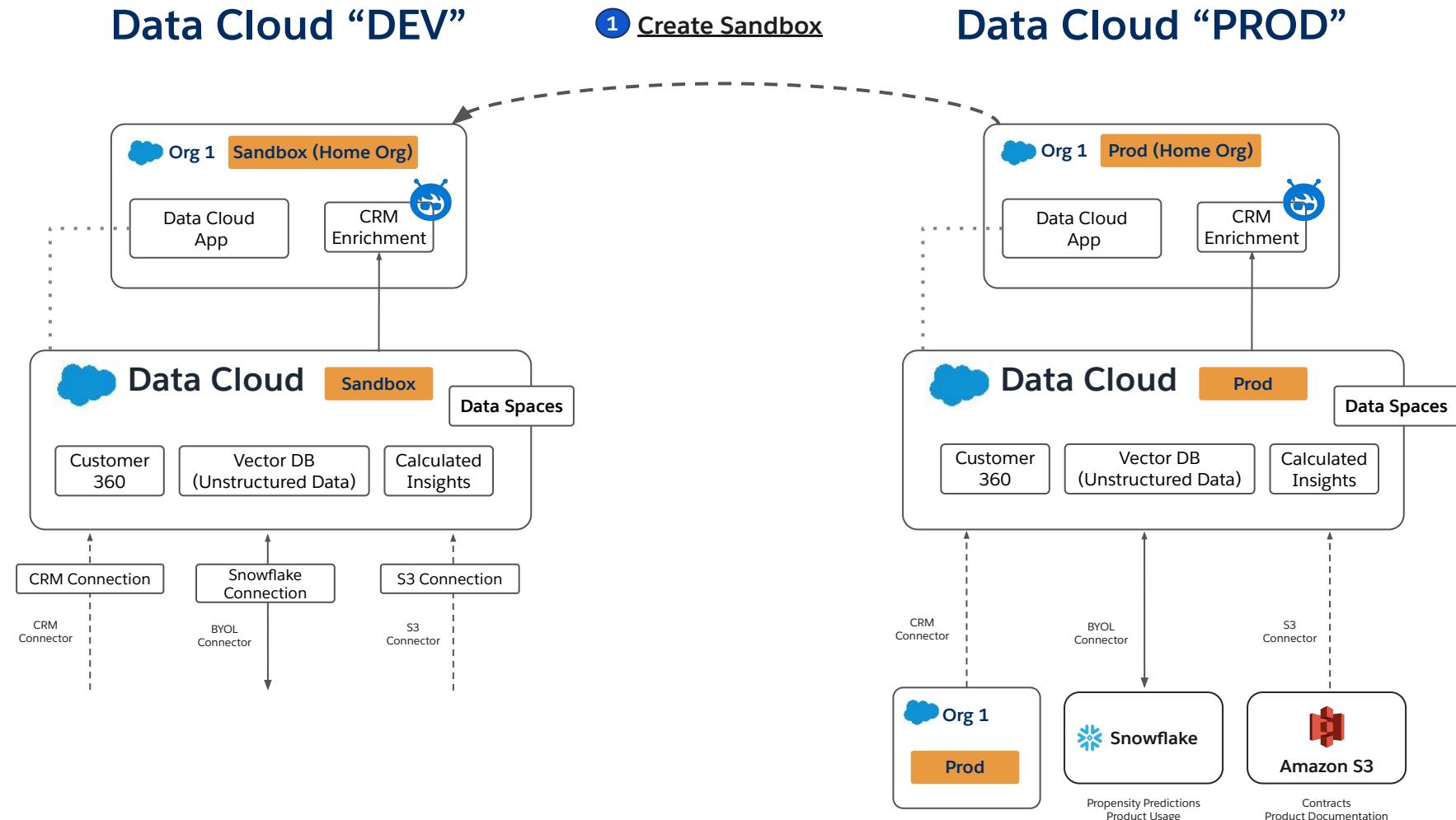
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- no Data Cloud data is replicated from Prod

1 Create Sandbox



Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes



Single Org, Existing Data Cloud Implementation

Data Cloud “DEV”

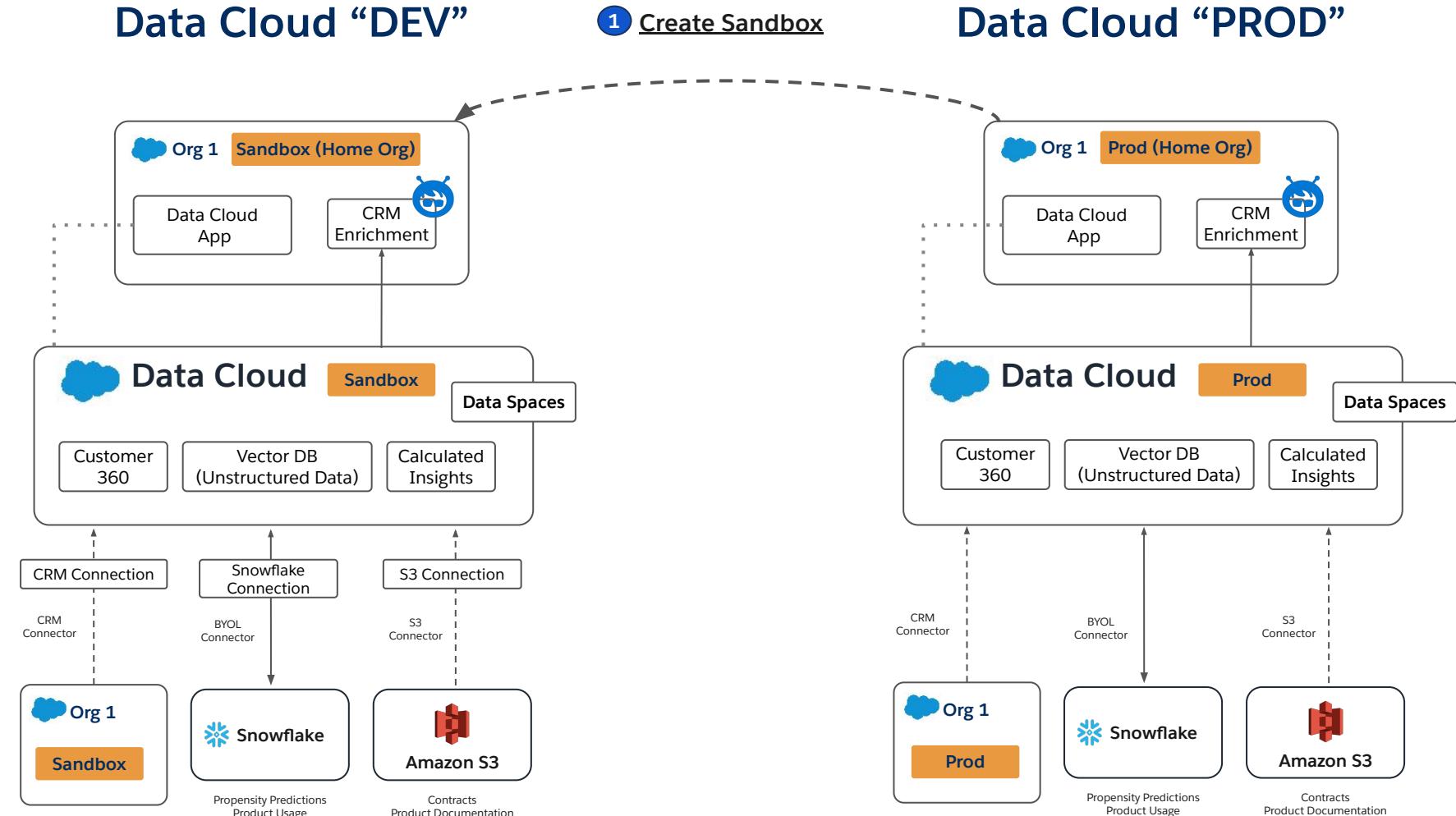
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4 Reconfigure existing connections so Data Streams can ingest data



Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes

Single Org, Existing Data Cloud Implementation



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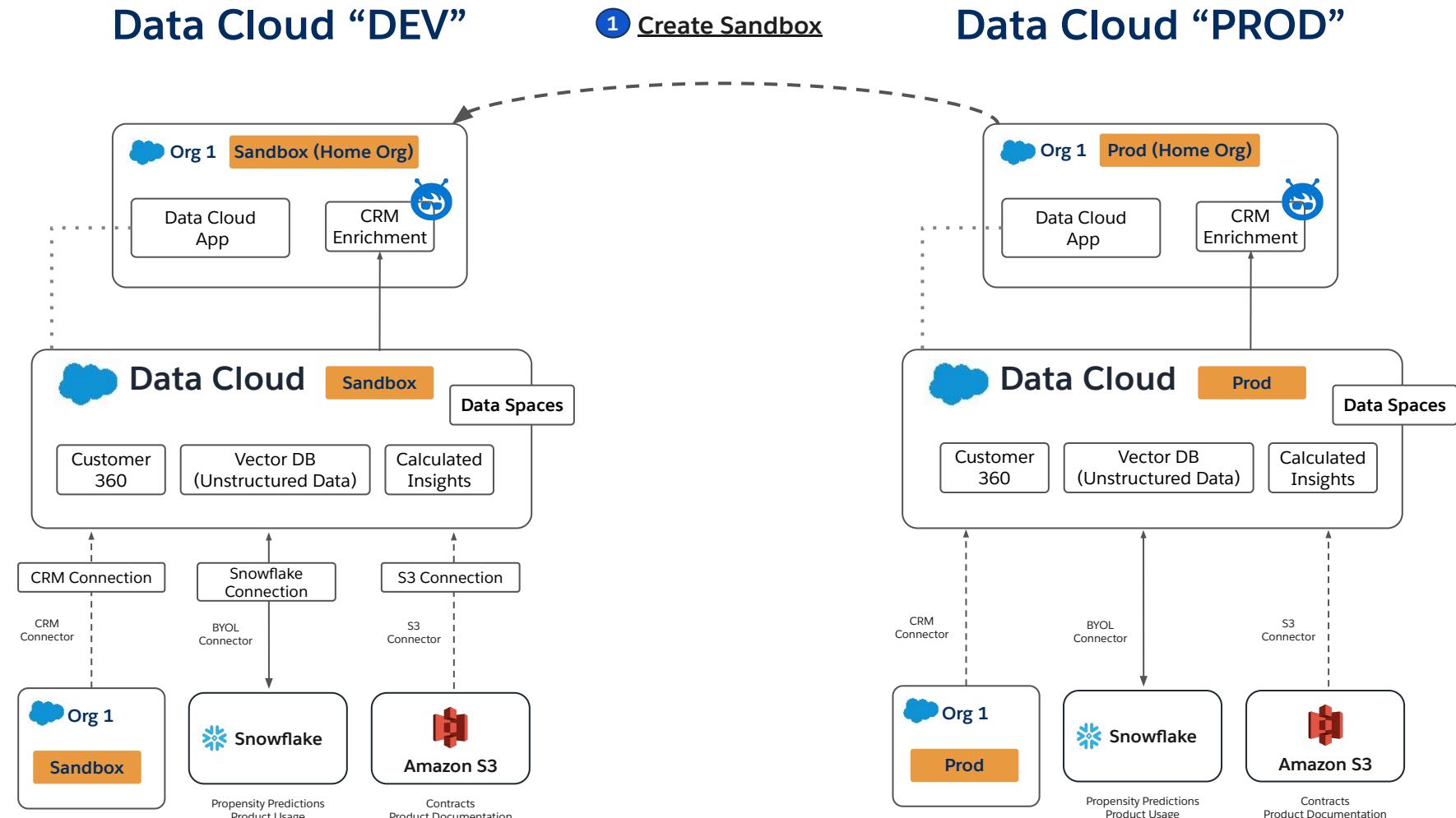
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- Data Cloud Config
- Core Org Config

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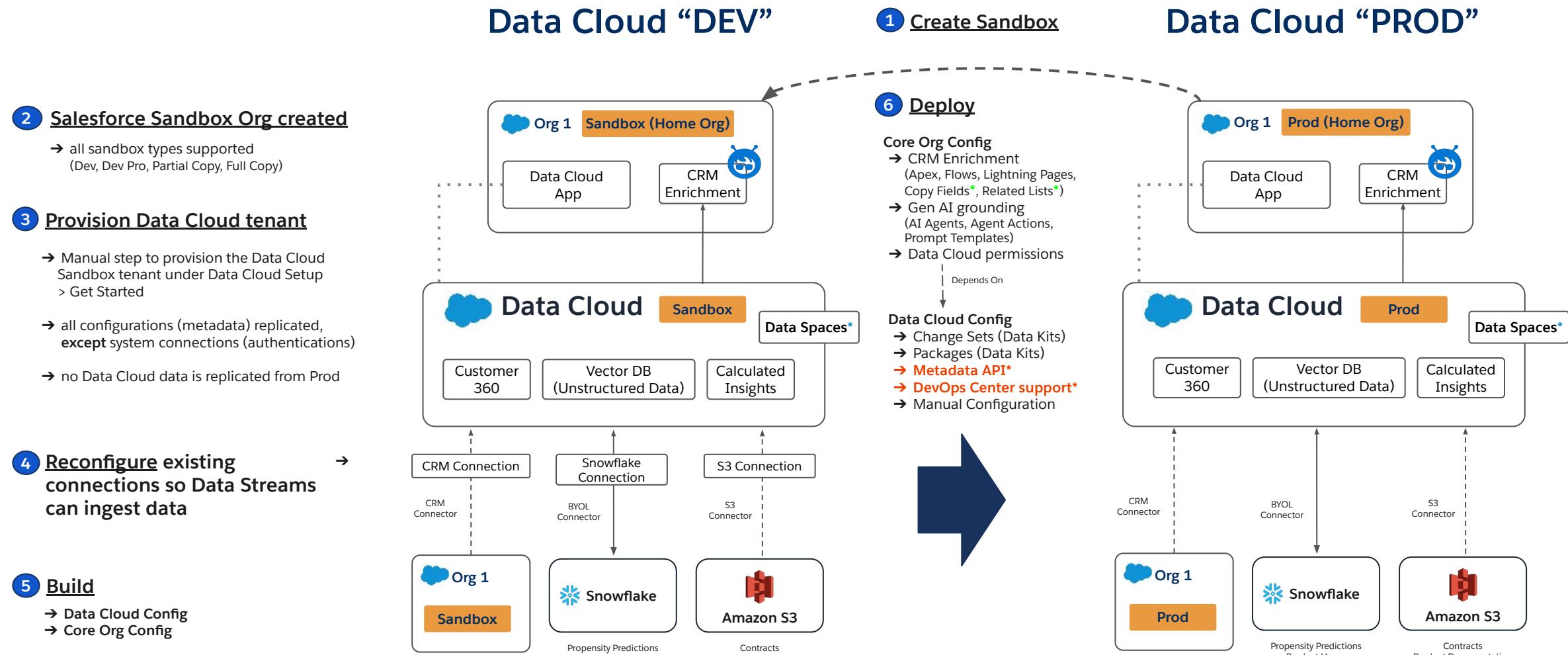


Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes



Single Org, Existing Data Cloud Implementation



*Future/roadmap support

*Packaging and Metadata API support for Data Cloud Copy Fields and Related Lists are roadmap items (Safe Harbor)

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Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes



Multiple Orgs, Existing Data Cloud Implementation

Data Cloud "DEV"

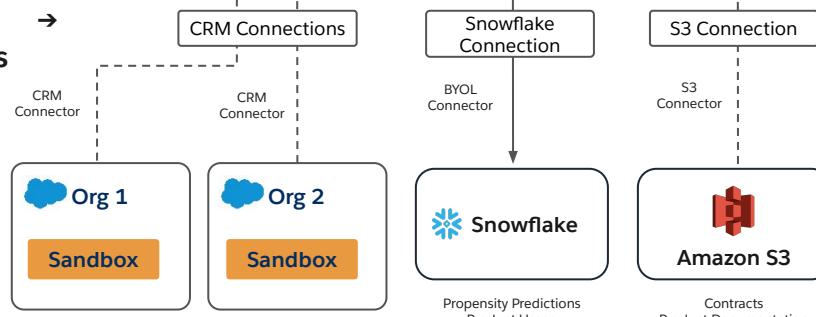
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5 Build

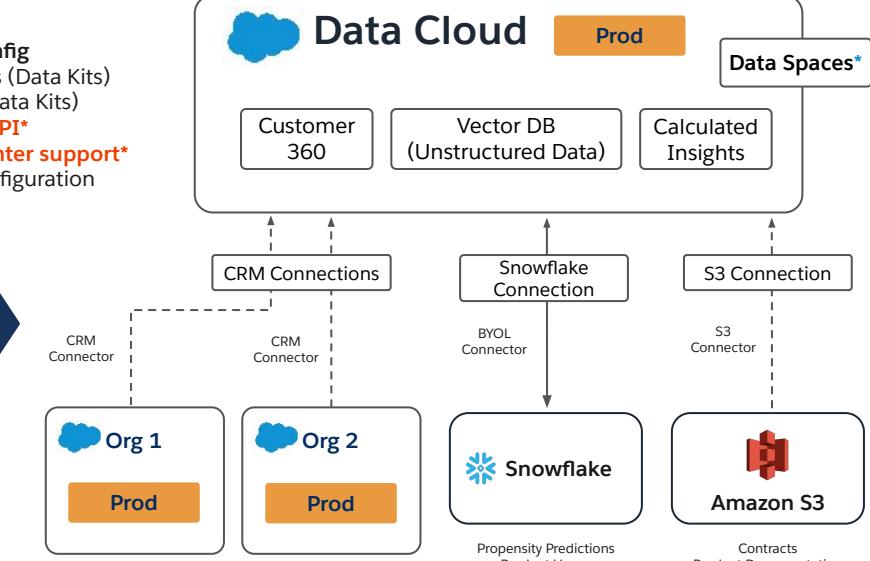
- Data Cloud Config
- Core Org Config

1 Create Sandbox

6 Deploy

- Core Org Config
 - CRM Enrichment
(Apex, Flows, Lightning Pages, Copy Fields*, Related Lists*)
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- Depends On
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Data Cloud "PROD"



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Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes



Multiple Orgs, Existing Data Cloud Implementation

How does Data Cloud One work with Sandboxes?

Data Cloud “DEV”

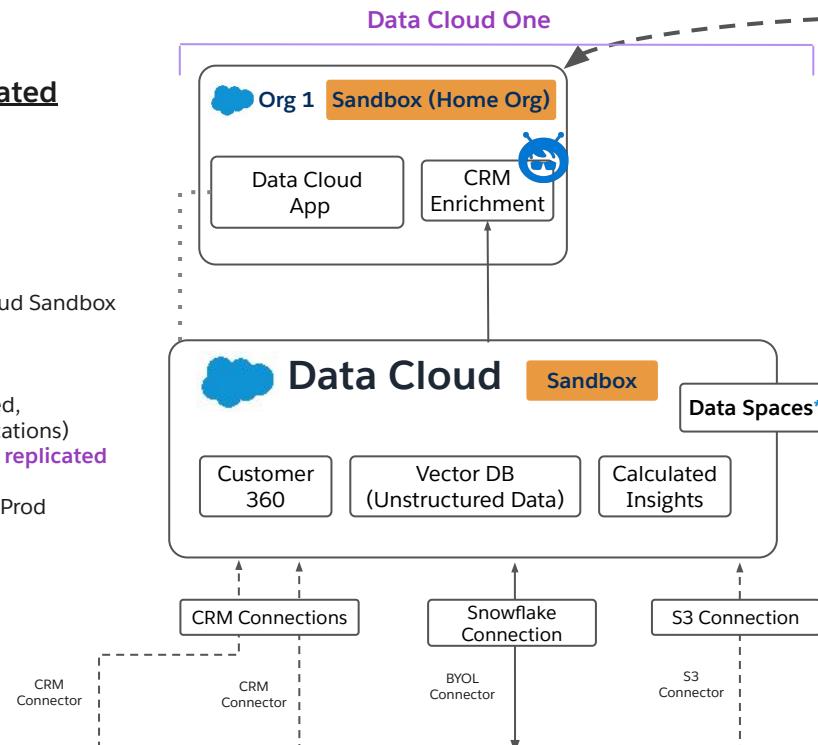
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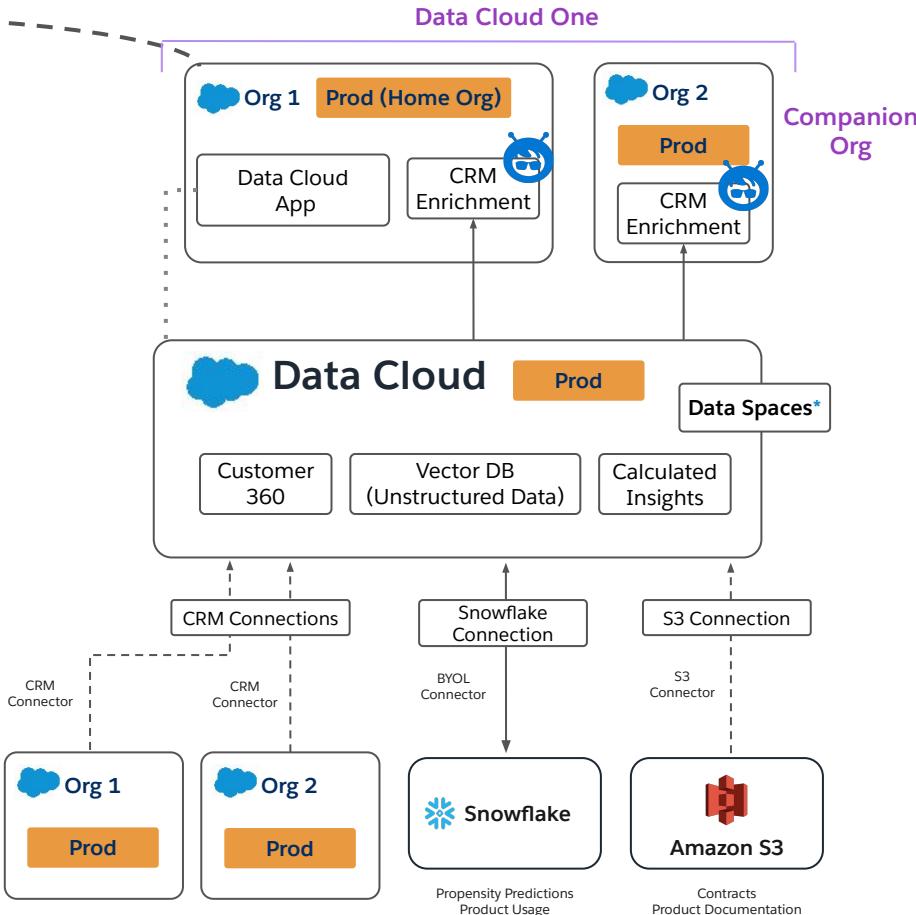
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1 Create Sandbox



Data Cloud “PROD”



Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes



Multiple Orgs, Existing Data Cloud Implementation

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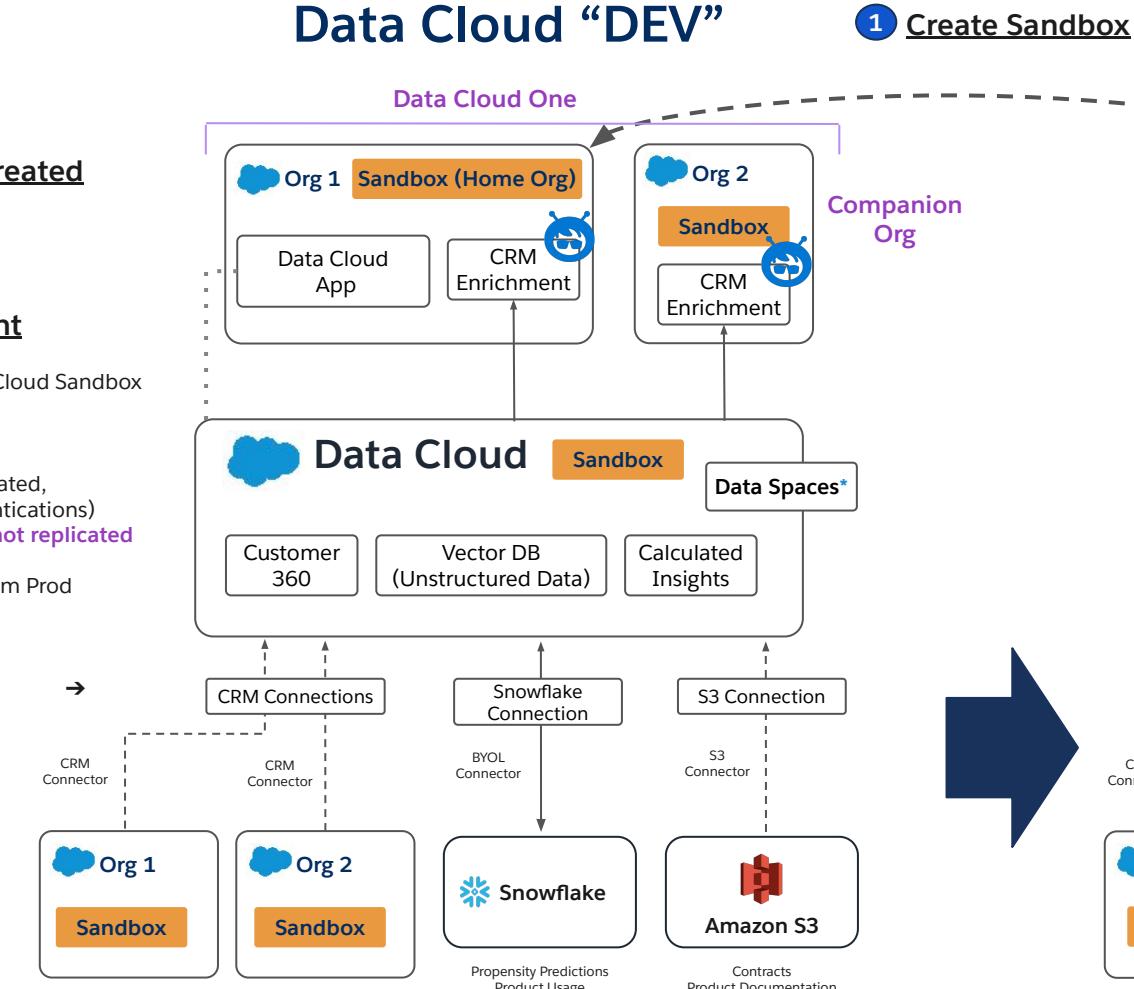
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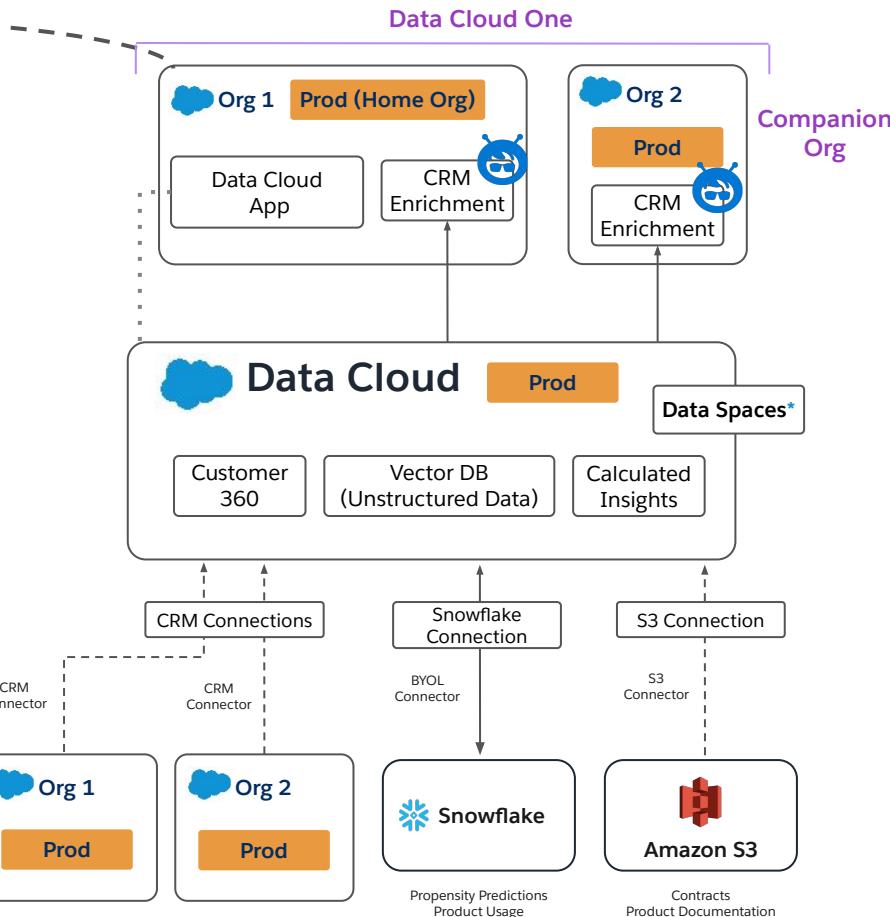
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4 Reconfigure connections for Data Streams and Companion Orgs



Data Cloud “PROD”



Data Cloud - Sandboxes

DevOps Pipeline w/ Data Cloud Sandboxes



Multiple Orgs, Existing Data Cloud Implementation

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Data Cloud “DEV”

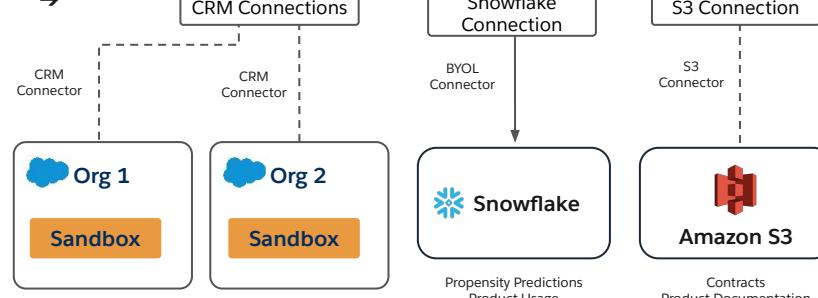
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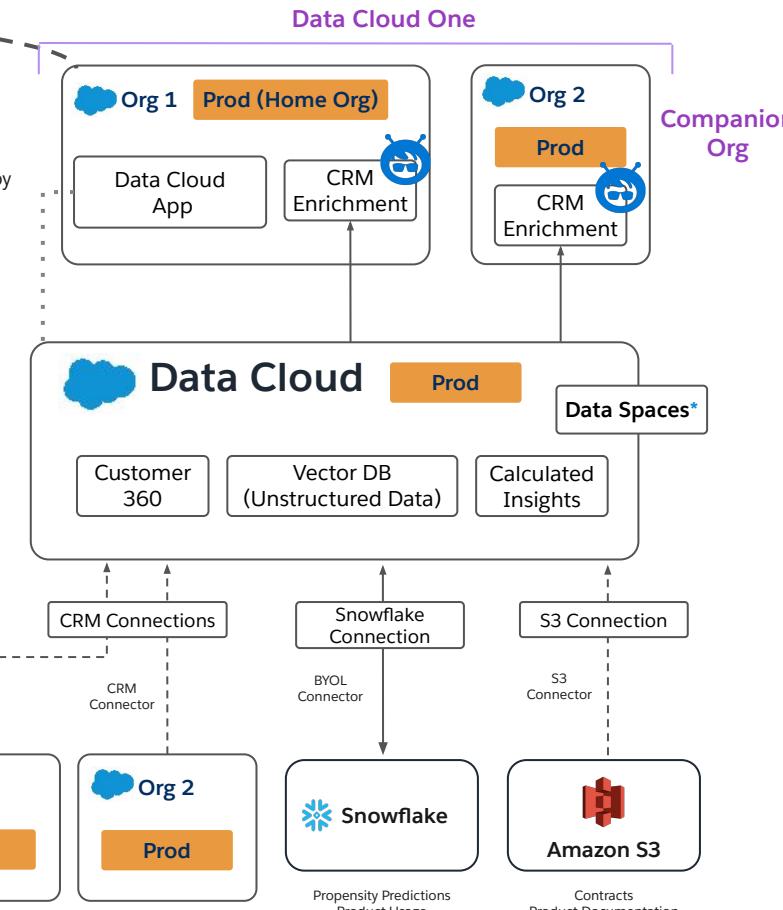
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- Core Org Config

1 Create Sandbox

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Data Cloud “PROD”



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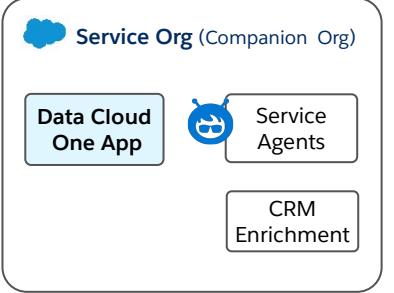
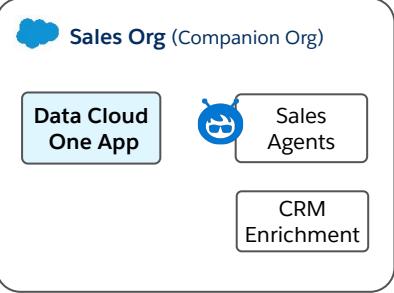
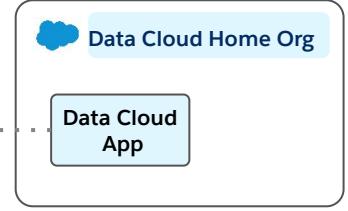
*Data Spaces have to be configured in Prod before deploying the data model that relies on them into Prod

Sandbox env when you have a Dedicated Home Org



PROD

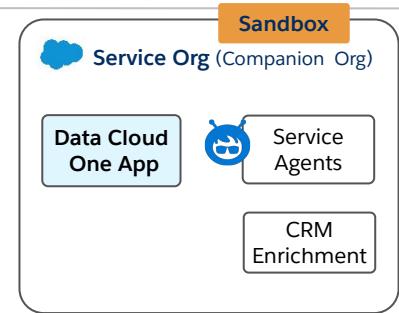
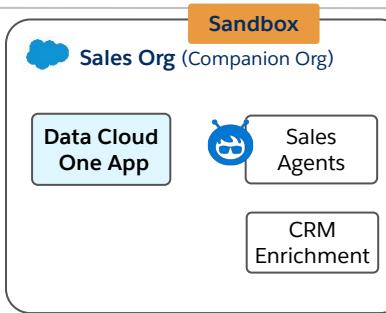
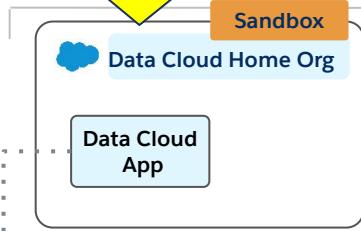
Data Cloud One



Because the dedicated Home Org doesn't have business data, the sandbox will be created much quicker and/or not refreshed often or ever.

DEV

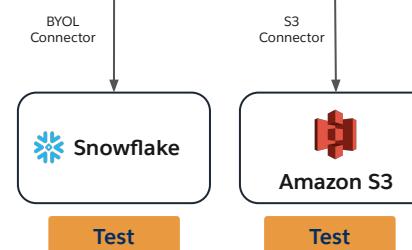
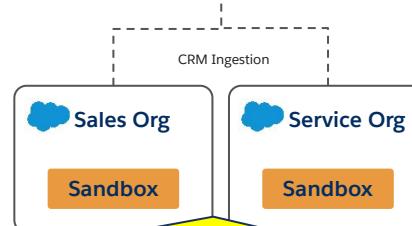
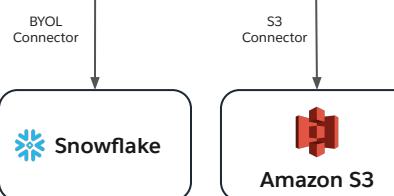
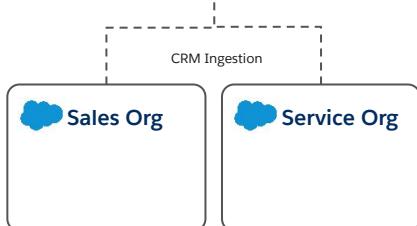
Data Cloud One



Data Cloud (Tenant)

Data Cloud config isn't affected much by LOB sandbox refreshes.

Only connections to Source and Companion Orgs need to be updated.

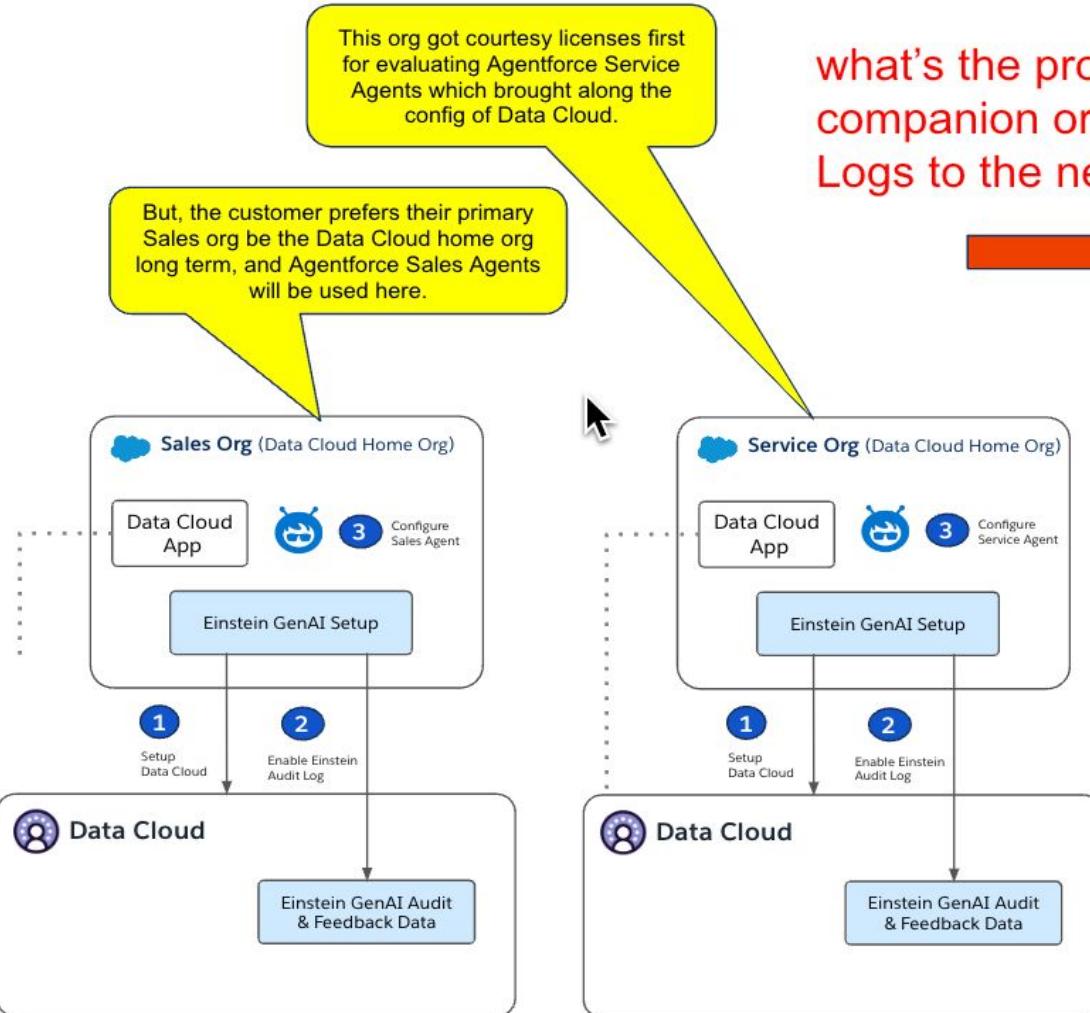


Only LOB Orgs need to be partial or full-copy sandboxes and refreshed periodically

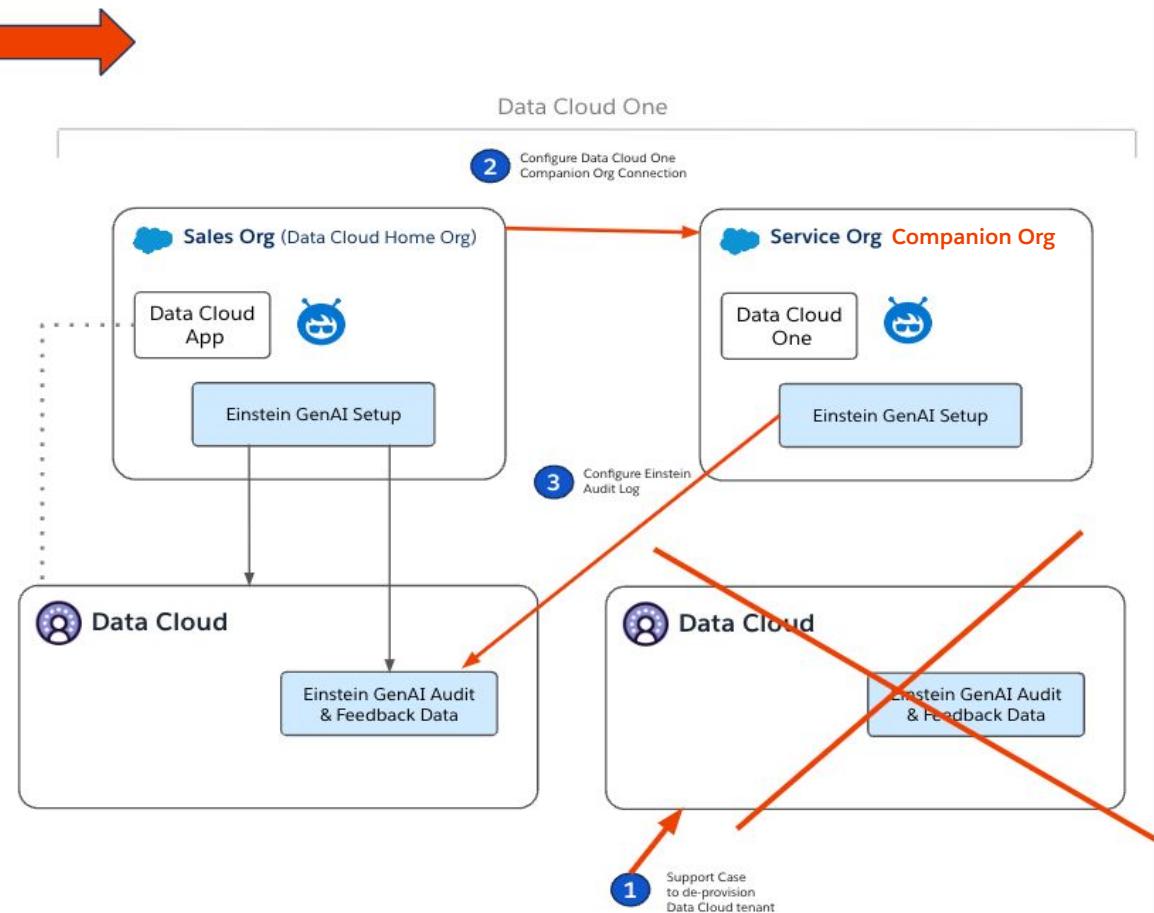
Other Considerations



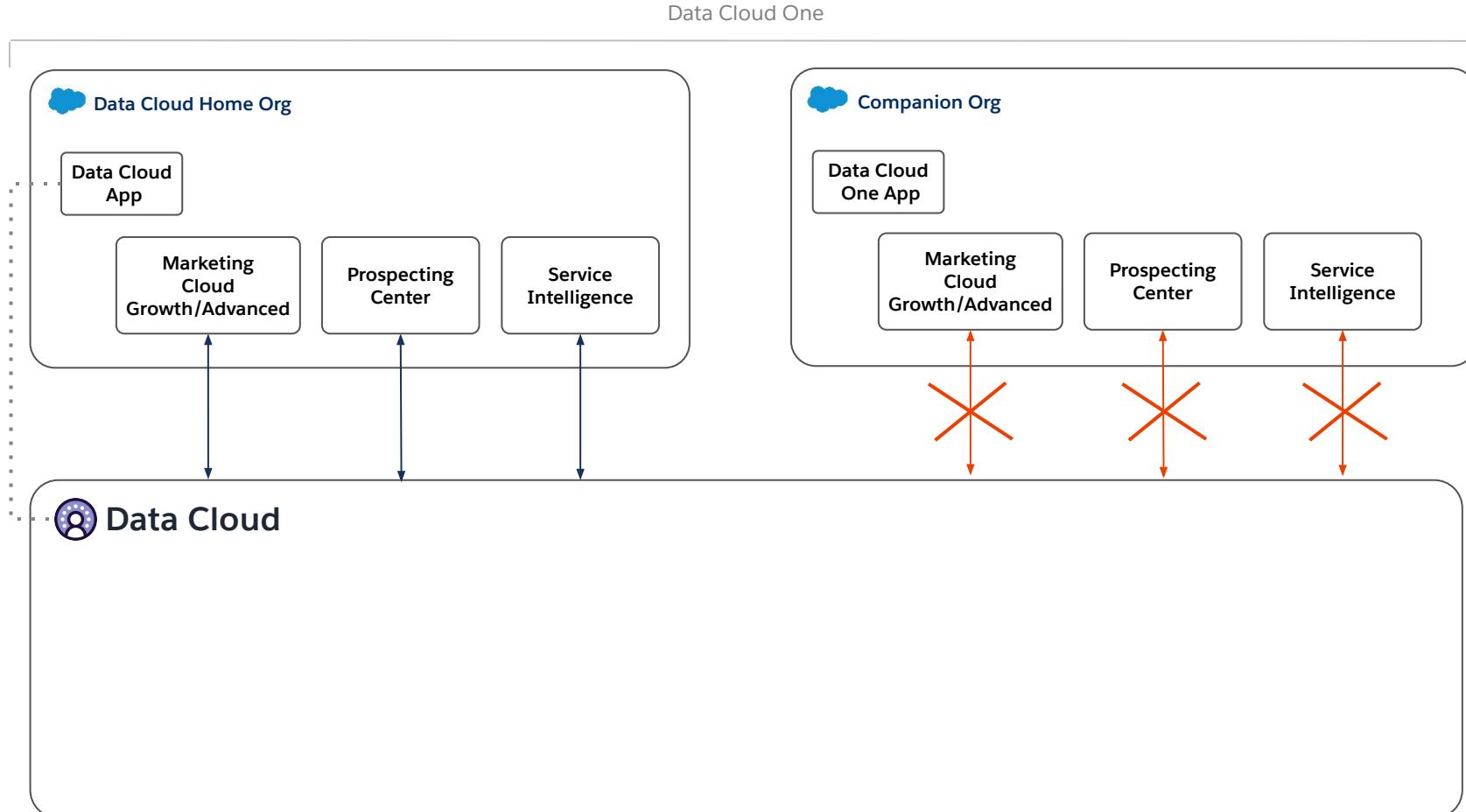
Converting a Home Org to a Companion Org



what's the process to turn an existing home org into a companion org and point the Einstein Audit/Feedback Logs to the new Data Cloud tenant?



Some products only supported in the Data Cloud Home Org today



Business Value Map



Strategic Objectives		Differentiated Capabilities	Value Drivers (KPIs)
Business Objectives	Improve customer relationships	Single 360° customer view Join various data sources into a single, easily accessible unified profile	↑ Data accuracy ↓ Duplicate records
	Increase marketing effectiveness	Proactive customer service Anticipate & deflect cases by sharing info proactively (e.g., utilization, upcoming renewals, potential CSAT issues, etc.)	↑ Customer retention / CSAT ↓ Data processing time
	Deliver operational efficiency	Real-time personalization Monitor customer tendencies. Real-time segmentation of your customer to provide personalized messaging and content	↑ Employee productivity ↓ M&A activation time
	Position for continued growth & acquisition integration	AI-powered insights & analytics Predict behavior to offer assistance & recommendations (e.g., renewals, next best action, propensity to buy)	↑ Renewal upsell ↑ Customer lifetime value
IT Objectives		Cross-functional collaboration Break down data silos with forecasting, collaboration & seamless passing of leads across BUs	↓ Tech debt
		Scalable & trusted architecture Data management solution that is easy-to-use with point & click capabilities for connecting, harmonizing, and unifying data	↓ IT costs ↑ Speed to market

Thank You

