

10:20 AM - 11:05 AM

Integrating WhatsApp with Agentforce

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.ext

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About Me - Pato Sapir



- Solutions Consultant
- Started working with Salesforce Marketing Cloud in 2012
- Salesforce MVP & Marketing Champion
- Founder of Devs United: www.devsutd.com
- Now founder of .ext: www.exhq.com
- Amateur Beekeeper

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.ext
www.exthq.com

Giving **freedom** back to marketers by
creating tools that extend and maximize
their investments.



Content Scheduler

Schedule and manage promotions.



Nucleus

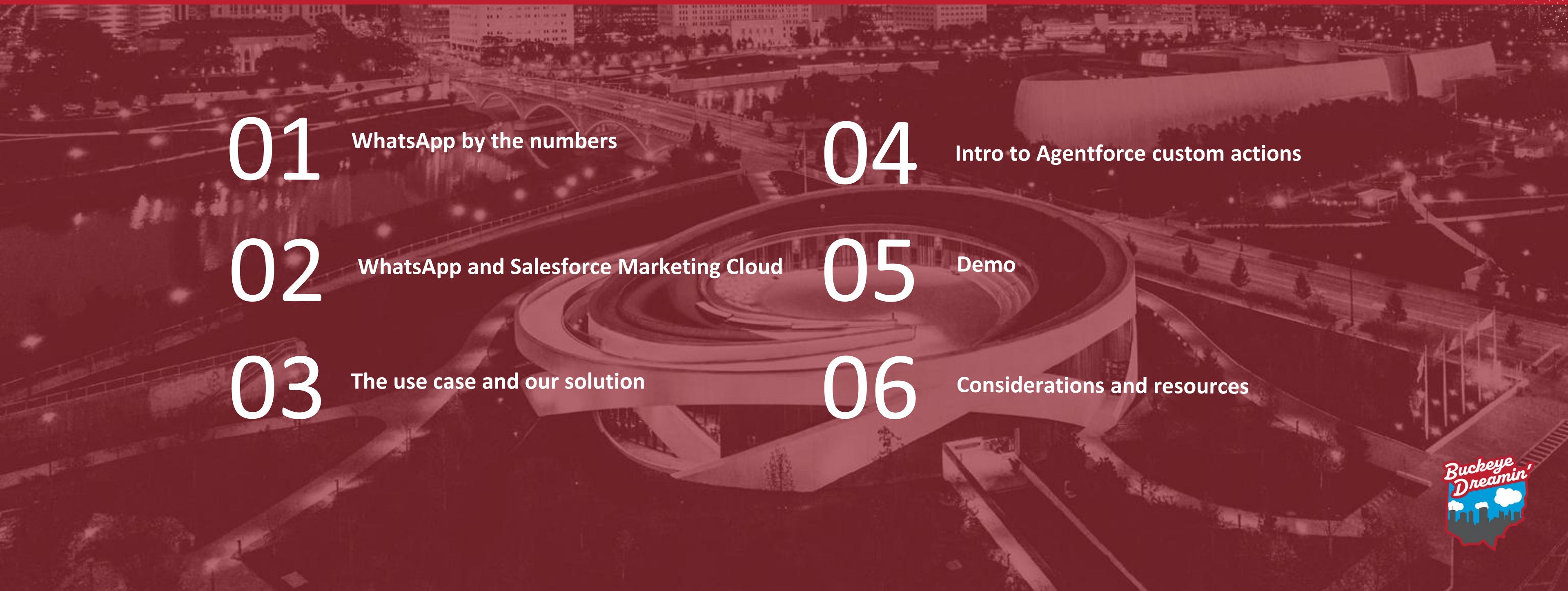
Centralize and automate your
campaign management workflow.



Octopai

Multivariate content testing for
Marketing Cloud powered by AI.

AGENDA



01

WhatsApp by the numbers

02

WhatsApp and Salesforce Marketing Cloud

03

The use case and our solution

04

Intro to Agentforce custom actions

05

Demo

06

Considerations and resources



WhatsApp by the numbers

2B

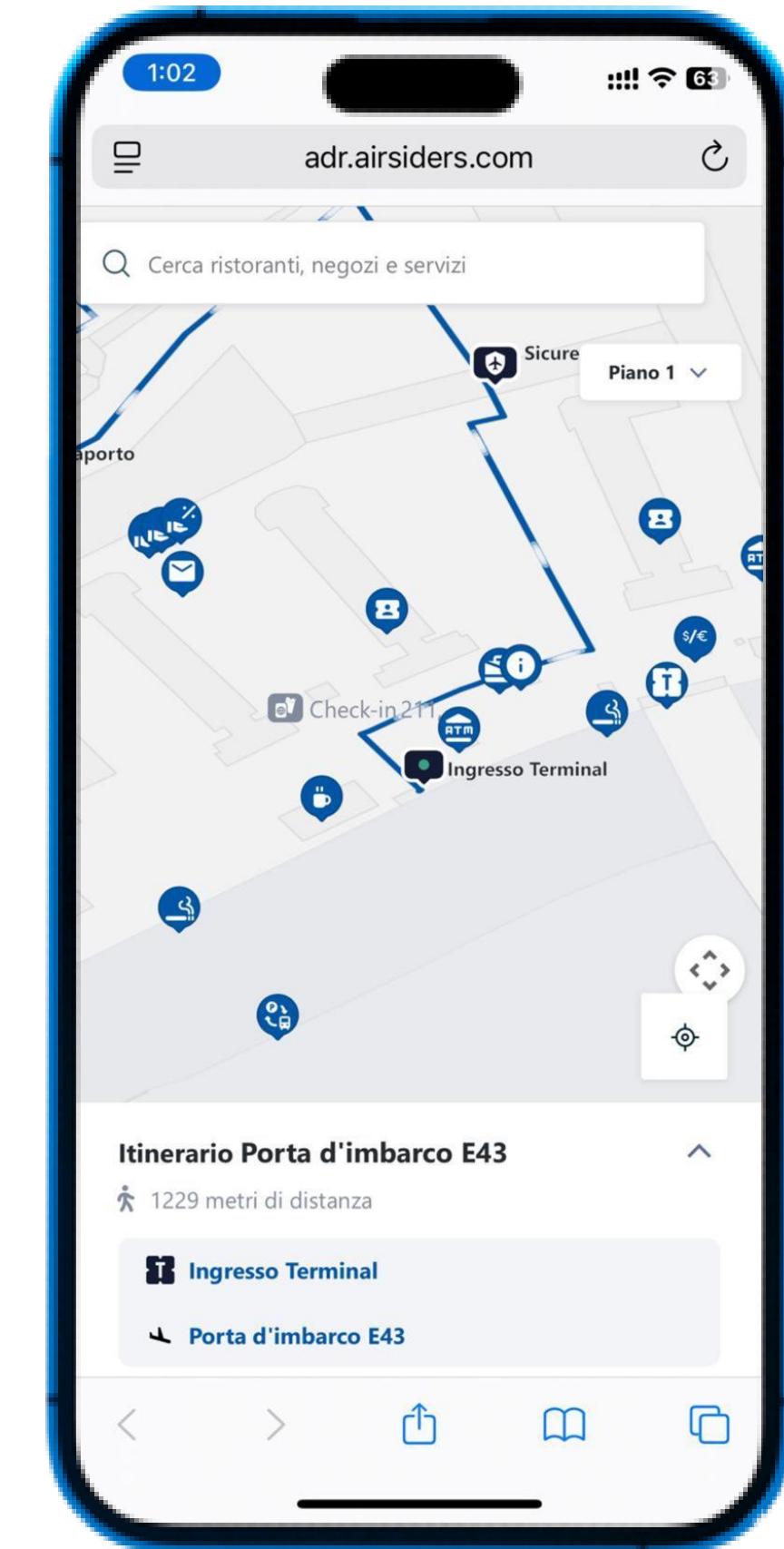
Monthly Active users
worldwide.

100M

Monthly active users in the
US (about 29% of US
adults).

45%

Click-through rates with
WhatsApp Marketing
Campaigns (compare to 2-
5% average engagement).





WhatsApp + Salesforce Marketing Cloud Engagement

- Connect your WhatsApp business account to SFMCE.
- Send personalized messages to your contacts in Journey Builder.
- Respond to messages sent by users.
- Redirect messages to customer service reps (requires a Unified number).

Get started here:

https://help.salesforce.com/s/articleView?id=mktg.mc_jb_whatsapp_chat_messaging.htm&type=5



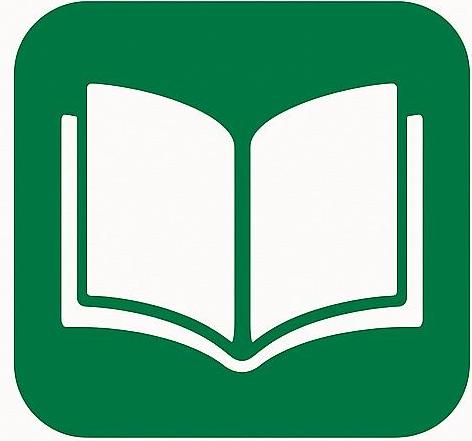


Other ways to integrate WA with SF

Method	Advantages	Considerations
Digital Engagement	<p>Unified conversation across multiple channels and platforms (you can transfer a messaging session from SFMC to Service Cloud!)</p>	<p>Requires a Unified number and migration if you already have a WhatsApp number in SFMCE.</p>
Custom integration with Meta API	<p>Interact directly with Meta and access all their API endpoints.</p>	<p>Requires custom development / tech debt.</p>
Marketing Cloud Growth/Advanced (Next)	<p>Sits on top of your Salesforce Data. One unified view of the customer with multiple outcomes.</p>	<p>Platform might not support complex use cases (for now).</p>



The use case: Books for you



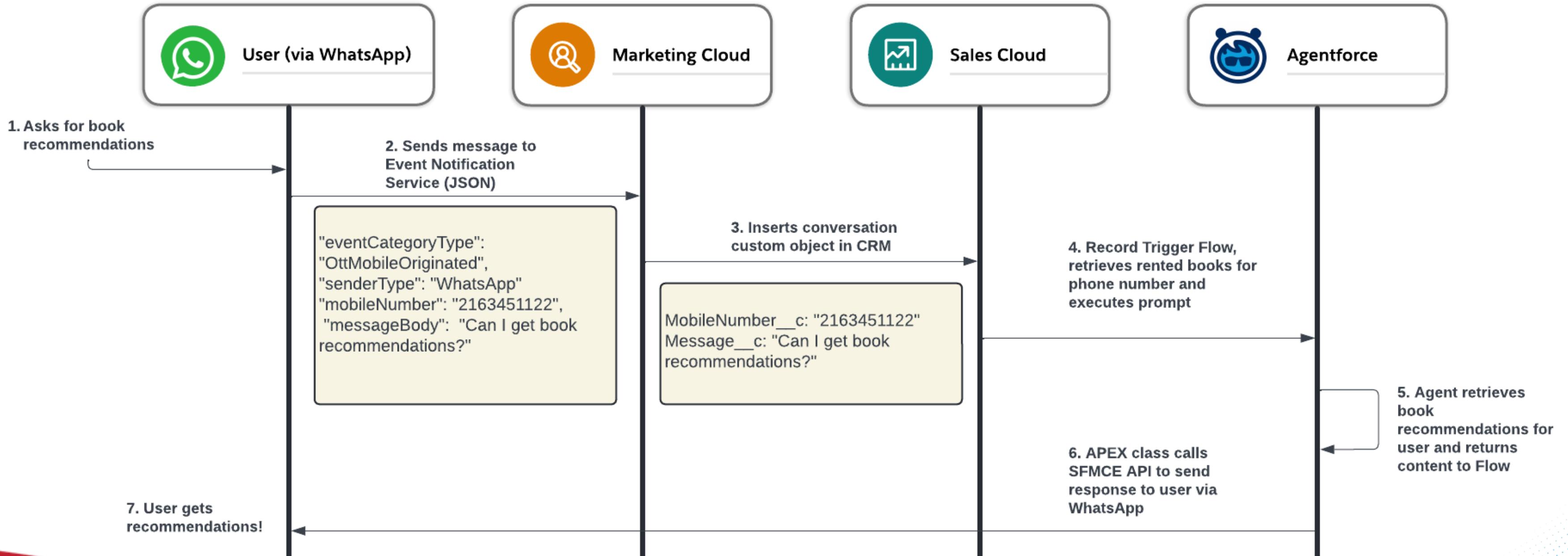
Books for You

- Books for You(not a real company) is the one stop destination for checking out library books in your phone or e-reader from libraries all over the country.
- They have Marketing Cloud Engagement, with WhatsApp.
- They have Sales Cloud where they hold all the user check outs and book data.
- They have the integration between SFMCE and Sales Cloud (MC Connect).

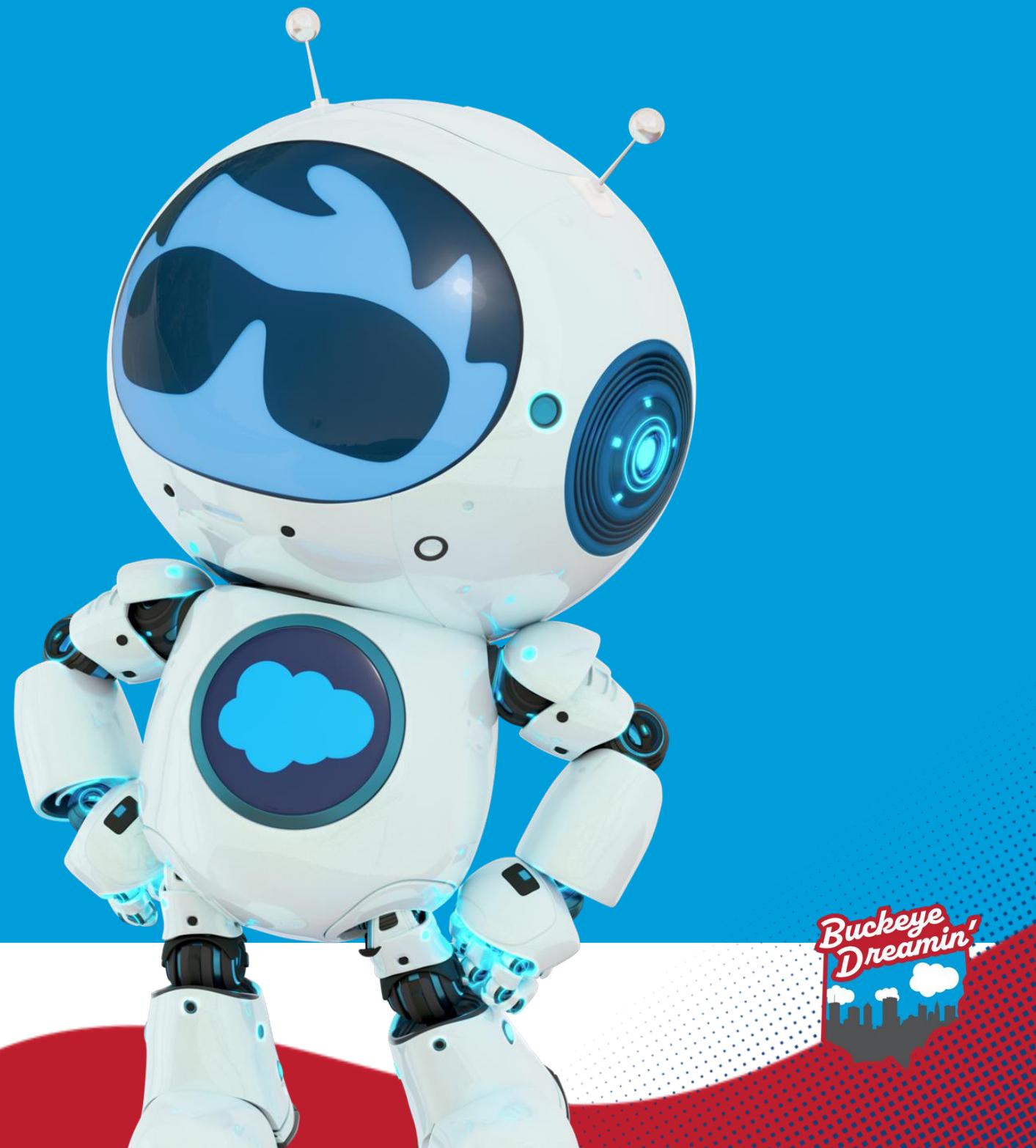
From the team: “We want to implement an AI Agent, so users ask for book recommendations in WhatsApp. The agent should provide book recommendations based on past check outs. This functionality will unlock future Agentforce use cases for us!”



Our Solution



IT'S AGENTFORCE TIME!

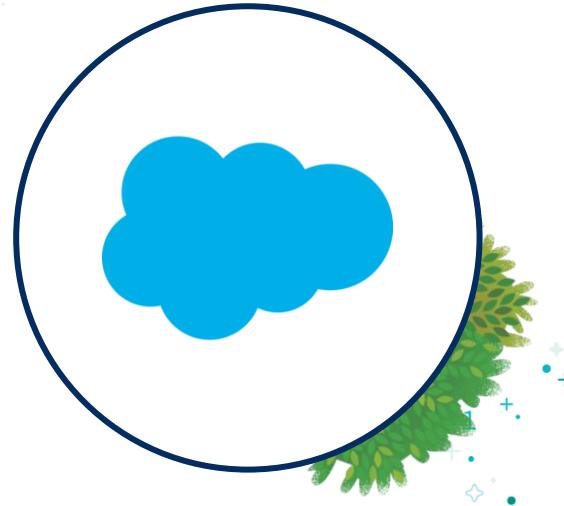


How agents work



Einstein Trust Layer

Actions Overview



Salesforce



Customers

Standard Actions

Cloud Actions



Platform Actions



Custom Actions Invoke



Prompt Template



Flow



External Service



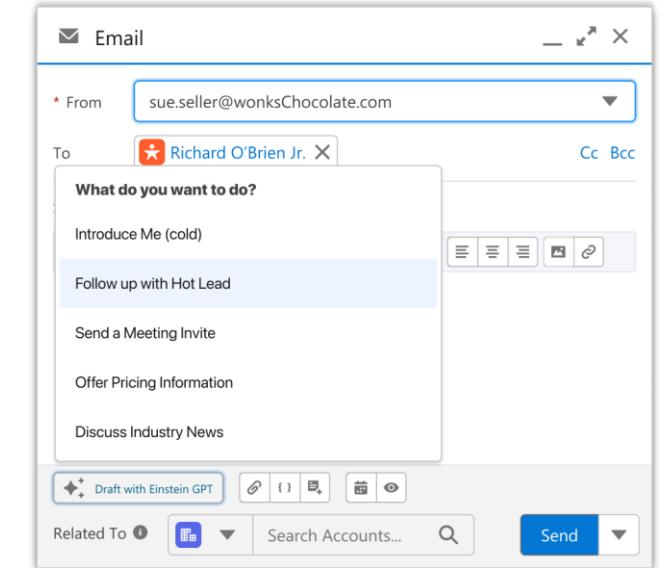
Apex

More info on actions: https://help.salesforce.com/s/articleView?id=sf.copilot_actions_ref.htm&type=5



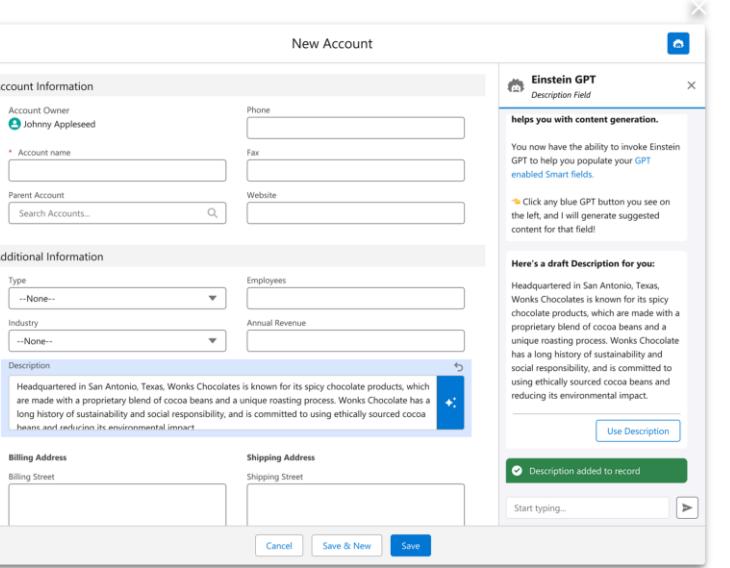
Prompt Templates Types

Sales Email



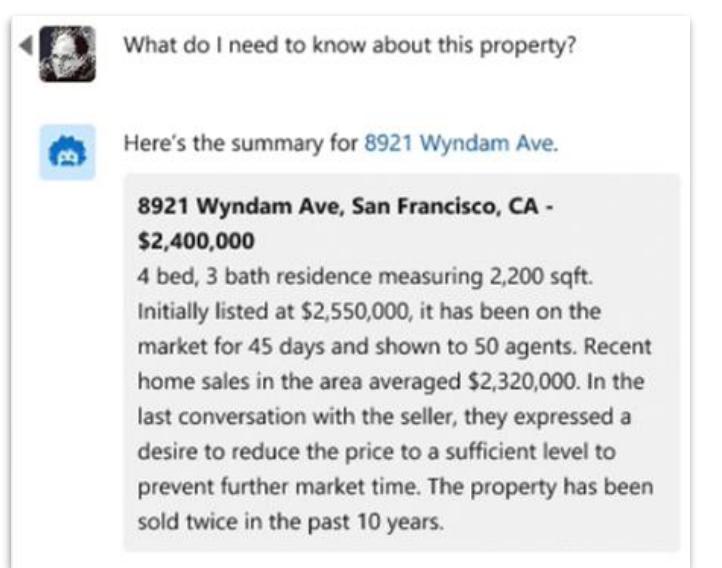
Auto-create highly personalized and relevant emails grounded on CRM data with a single click

Field Generation



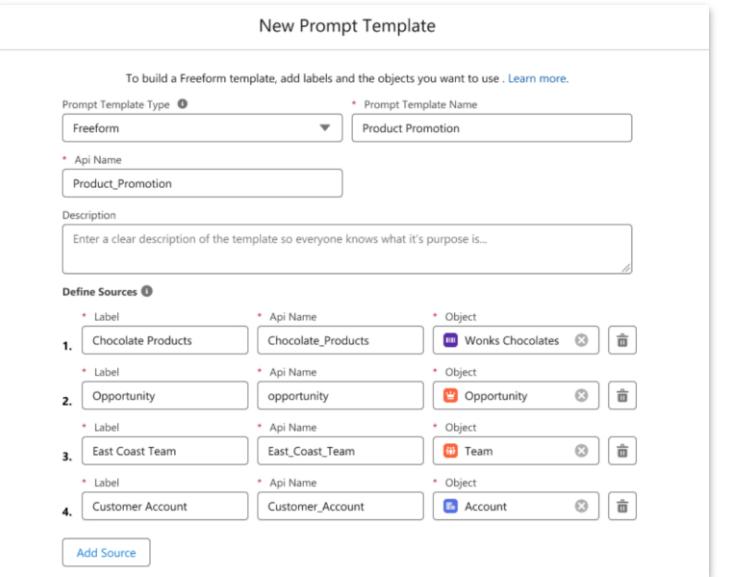
Enable single-click actions to auto-generate summaries, descriptions and other field values grounded on CRM data

Record Summary



Customize the default summarization Copilot action for any object based on field data, activity history, and related records

Flex



Create custom prompt templates that ground on multiple objects and can be called as an invocable action in any business process



Grounding Prompts with your Data

Record Data

Related Lists

Flows

Apex

Data Cloud

MuleSoft

Prompt Builder Welcome Email for Upcoming Trip Version 1

Record Data

Related Lists

Flows

Apex

Data Cloud

MuleSoft

Prompt Template Workspace i

Your name is **Input:Sender.Name**. You work in the **Marketing** department. Generate an email welcoming the guest for their upcoming trip. Guest name: **Input:Recipient.Name**. Check-in date: **Apex: GetCheckinDate**. Write a story that paints the picture of infinite possibilities based on the guest's interests. List of resort experiences matching the guest's interests.

Resource i

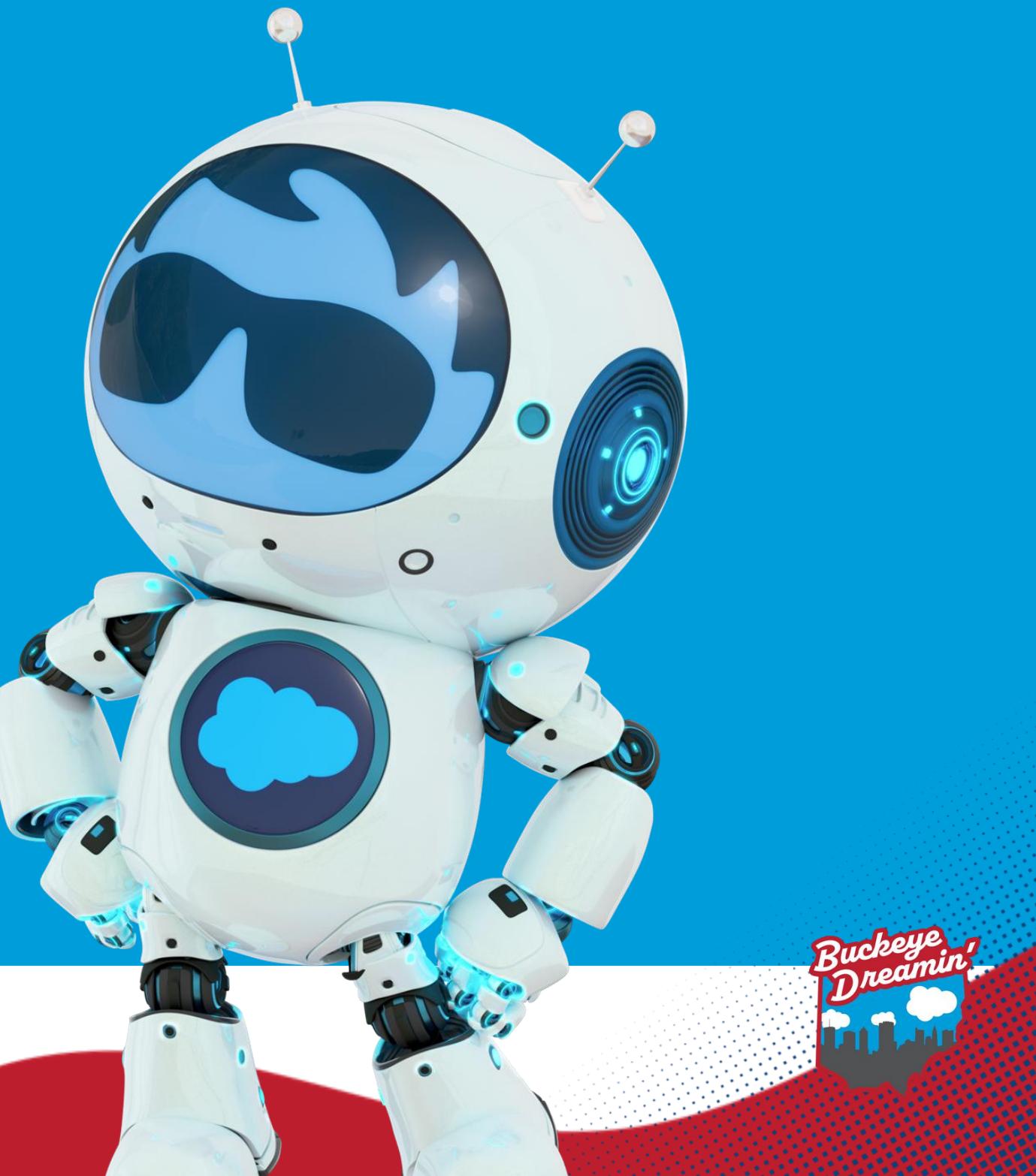
Search for or select a resource to insert

Resources

- Flows
- Apex
- Current Organization
- Sender
- Recipient



DEMO



Buckeye
Dreamin'



Considerations

- **When implementing WhatsApp in SFMCE**

- Messaging multipliers
- Mobile Terminated Templates
- Consent

- **When thinking about this use case**

- This is one way to solve this challenge (you could solve this challenge with the Agentforce API or Digital Engagement, for example).
- This use case doesn't only apply to WhatsApp (same use case can be solved for SMS or even email!)
- When working with prompts, understand prompt basics, experiment and test!
- Consider Agentforce usage pricing and implementation.



Resources

- This deck and solution details: <https://github.com/psapir/agentforce-whatsapp-example/>
- Getting started with WhatsApp for Marketing Cloud Engagement:
https://help.salesforce.com/s/articleView?id=mktg.mc_jb_whatsapp_get_started.htm
- Getting started with Event Notification Service:
<https://developer.salesforce.com/docs/marketing/marketing-cloud/guide/ens-get-started.html>
- Agentforce Actions:
https://help.salesforce.com/s/articleView?id=sf.copilot_actions_ref.htm&type=5
- Agentforce workshops: <https://developer.salesforce.com/agentforce-workshop>



CONTACT

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