

STEP BY STEP AGENTFORCE SETUP AND DEPLOYMENT ON SITE

(IMAGE FOR EVERY SINGLE STEP)

By Smriti Sharan
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AGENDA

1. **Enable Eistien and Create Agent**
2. **Create a Community Site**
3. **Enable Omni-Channel**
4. **Create Routing Configurations**
5. **Create a Fallback Queue**
6. **Build Omni-Channel Flow**
7. **Create Messaging Channel**
8. **Set up Embedded Service Deployment**
9. **Add CORS URL & Validate Deployment**

Those who embrace
AI today will define
the jobs of tomorrow.

SETUP > EINSTEIN SETUP > ENABLE



Setup

Home

Object Manager

Search Setup

★

+

🔒

?

⚙️

🔔

👤

Einstein Bots Assessor

Einstein Conversation Insights Assessor

Sales Cloud Einstein Assessor

Service Cloud Einstein Assessor

▼ Einstein Generative AI

▼ Agentforce Studio

Agentforce Agents

Agentforce Assets

Testing Center

Einstein Setup

Flow Creation with Einstein

Prompt Builder

▼ Einstein Platform

Einstein Bots

SETUP

Einstein Setup

Turn on Einstein

Enhance your Salesforce data with generative AI to create relevant, customized experiences for your users. [Learn more in help.](#)

✓

On

Turn on Global Language Support for Prompt Builder

Use global languages with prompt templates. Some elements of the Einstein Trust Layer may not be available for these languages. See [Einstein Trust Layer Region and Language Support](#).

Off

Deploy Prompt Templates


Activate and deactivate prompt templates when deploying between sandbox and production using change sets.

Off

SETUP > AGENTFORCE AGENTS > ENABLE

- ▼ Einstein
- ▼ Einstein Generative AI
- ▼ Agentforce Studio
- [Agentforce Agents](#)

Didn't find what you're looking for?
Try using Global Search.



SETUP > AGENTFORCE STUDIO

Agentforce Agents

Agentforce

✓

On

+ New Agent

▼ Get to Know Agentforce Agents



Hit the Trail with Agents

Follow along with an admin as they explore what makes agents tick and launch an agent for their business.

Go to Trailhead



Customize Agents with Actions

Actions are how an agent gets things done. Learn how to create agent actions tailored to your business needs in the Salesforce Admins Blog.

Go to Blog



Succeed with Documentation

Salesforce Help has all the info you need to customize, test, and activate an agent for your use cases.

Go to Help

Enable the Agentforce (Default) Agent

✓ On

Help your employees accomplish key business tasks in Salesforce and Slack with the default AI assistant for Salesforce CRM.

SELECT AGENTFORCE SERVICE AGENT



Steps

1 Select an agent

Select an agent

This determines your agent's role and what they do.



Create from a Template



Create with Gen AI

Search



Slack Employee Help

Help employees get answers to questions in Slack. Summarize findings from your company's Slack history and any added knowledge to get answers, or create a Slack canvas with these findings and share them with others.



Agent for Setup

Simplify administrative tasks with Agent for Setup. Customize and manage your org and quickly find documentation with Agent for Setup.



Agentforce Employee Agent

Automate common business tasks and assist users in their flow of work. Agentforce Employee Agent can search knowledge articles and other data sources. Customize it further to meet your employees' business needs.



Agentforce Service Agent

Deliver personalized customer interactions with an autonomous AI agent. Agentforce Service Agent intelligently supports your customers with common inquiries and escalates complex issues.

Cancel

Next

Learn About Agents

Agents are autonomous AI assistants that specialize in specific use cases. They increase productivity and reduce the workload on teams by automating routine tasks and assisting with complex ones.

How do agents work?

[Show Me More](#)

What are some benefits of agents?

[Show Me More](#)

ADD GENERAL FAQ IN THE TOPIC



Agentforce Builder

New Agent



Help

Back

Next

Steps



Select an agent



Select your topics



Customize your agent



Select data sources

Escalation

Handles requests from users who want to transfer or escalate their conversation to a live human agent.

+ Add

General FAQ

This topic is for helping answer customer's questions by searching through the knowledge articles and providing information from those articles. The questions can be about the company and its products, policies or business procedures

[See Included Actions](#)

✓ Added

Service Customer Verification

Verifies the customer's identity before granting access to sensitive data. Actions like managing cases or making a reservation require identity verification. Sensitive data includes confidential, private, or security-protected information, such as business-critical data or personally identifiable information (PII). After verification is successful, don't repeat the process within the same session.

[See Included Actions](#)

+ Add

Learn About Topics

A topic is a category of actions related to a particular job to be done by agents. Adding topics to an agent helps the agent recognize how to behave and respond for different jobs. Topics contain actions, which are the tools available for the job, and topic instructions, which tell the agent how to make decisions. In sum, topics define your agent's range of capabilities.

Topics also improve the accuracy and conversational quality of an agent's responses. Topics add context to users' requests, such as a user's role and their flow of work.

After creating your agent, you can customize or create custom topics in Agentforce Builder.

Example: Agentforce Service Agent includes standard topics, like Customer Account Management and Order Inquiries, that you can use as a starting point for common use cases. To customize them to meet your unique business needs, add instructions, test your agent, and iterate.

[Learn More in Help](#)

AGENT USER – EINSTEIN SERVICE AGENT

← Agentforce Builder **New Agent**

? Help ▾

Back

Next

Steps

- ✓ Select an agent
- ✓ Select your topics
- 3 Customize your agent**
- 4 Select data sources

Describe your agent's job in more detail. **You can edit this later.**

* Name

Agentforce Service Agent

* API Name

Agentforce_Service_Agent

* Description ⓘ

Deliver personalized customer interactions with an autonomous AI agent. Agentforce Service Agent intelligently supports your customers with common inquiries and escalates complex issues.

814 characters remaining

* Role ⓘ

An AI customer service agent whose job is to help customers with support questions or other issues.


156 characters remaining

* Company ⓘ

barista

248 characters remaining

* Agent User ⓘ

 EinsteinServiceAgent User (agentforce_service_agent@00dggk0000071z0b.ext)

☐ Keep a record of conversations with enhanced event logs to review agent behavior ⓘ

[Learn More](#)

Best Practices for Agent Settings

Agentforce Service Agent settings determine how an AI agent behaves and presents itself in conversations. Use these best practices to help you write concise and conversational descriptions.

Description

Describe the primary goals of the agent, including how it should achieve those goals. Include details that help the AI agent understand its end users, such as customers' context, preferences, and common behaviors.

Role

The role setting is the job description for the agent - it tells the agent what role it's playing in your company. Include key responsibilities, functions, and the target audience. Describe key tasks that it performs on a day-to-day basis as well as specialized or one-off tasks. Start the role description with "You are..".

Company

Tell the agent about the company it represents. Describe what your company does, who its target customers are, and the value proposition

SKIP DATA SOURCE > CLICK CREATE

Back

Create

Steps

- ✓ Select an agent
- ✓ Select your topics
- ✓ Customize your agent
- 4 Select data sources**

Select data sources (Optional)

Upload or add data sources so your Agent can generate accurate, relevant answers for your business. **You can edit this later.**



Turn On Data Cloud

To add a Data Library, first set up and turn on Data Cloud.

[Learn more in Help](#)

Add Data to Your Agentforce Service Agent

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.

[Learn More in Help](#)

ADD TOPIC

[Batch Test](#)[Activate](#)

Topics

Data

Connections

Context

Language

Events

Checklist

javascript:void(0)

Topics



Manage the topics assigned to your agent. To make changes, your agent must be deactivated.

[New](#) [▼](#)[🌐 Add from Asset Library](#)[+ New Topic](#)

2 items • Sorted by Topic Label(asc)

Topic Label [↑](#)[Barista Menu](#)[🌐 General FAQ](#)

Put your topics to the test

Start a conversation to preview how your agent builds a plan and executes actions based on user interactions.

Conversation Preview



Let's chat!

Hi, I'm an AI service assistant. How can I help you?

ENG
IN10:31 PM
7/16/2025

CREATE TOPIC

Batch Test

Activate

→

×

ew ▼

↺

▼

▼

Put your topics to the test

×

Create a Topic

What do you want this topic to do? (Optional) ⓘ


barista menu

Cancel

Next

Conversation Preview

✖



Let's chat!

Hi, I'm an AI service assistant. How can I help you?

Describe your task or ask a question...

INSTRUCTIONS ARE ADDED AUTOMATICALLY AND YOU CAN ADD MORE

The screenshot displays the 'Agentforce Builder' interface. On the left, the 'Topics' sidebar lists 'Barista Menu' and 'General FAQ'. The main area shows the 'Create a Topic' dialog box, which is currently open. This dialog contains a list of instructions for the topic, including 'Provide detailed descriptions of menu items when requested.', 'Offer information on customization options available for drinks.', 'Check and confirm the availability of specific menu items.', and 'Clarify any dietary restrictions or ingredient queries related to menu items.' A 'Next' button is visible at the bottom right of the dialog. In the background, a 'Conversation Preview' window shows a chat interface with a cartoon astronaut character and the text 'Let's chat! Hi, I'm an AI service assistant. How can I help you?'.

Agentforce Builder Agentforce Service Agent

Topics

Manage the topics assigned to your agent. To make changes, your agent must be deactivated.

New

Search topics...

2 items • Sorted by Topic Label(asc)

Topic Label ↑

Barista Menu

General FAQ

Create a Topic

Instructions

The following instructions are used to run this topic.

- * Instruction
Provide detailed descriptions of menu items when requested.
- * Instruction
Offer information on customization options available for drinks.
- * Instruction
Check and confirm the availability of specific menu items.
- * Instruction
Clarify any dietary restrictions or ingredient queries related to menu items.

Add Instructions

Back

Next

Conversation Preview

Let's chat!

Hi, I'm an AI service assistant. How can I help you?

Describe your task or ask a question...

ACTIVATE THE SERVICE AGENT

[Batch Test](#)[Deactivate](#)

Topics

Data

Connections

Context

Language

Events

Checklist

← Topic Details

⌵ ⌶ ⌵

Topic Configuration This Topic's Actions

You're customizing

Barista Menu

* Name

Barista Menu

* API Name

Barista_Menu

* Classification Description ⓘ

This topic handles user inquiries related to the barista menu, including available drinks, ingredients, and customization options.

* Scope ⓘ

Your job is only to provide information on the barista menu, including details about the drinks, ingredients, and customization options available. Do not handle orders or other unrelated queries.


⌵

Put your topics to the test


Start a conversation to preview how your agent builds a plan and executes actions based on user interactions.

Conversation Preview

👁 ↺



Let's chat!



Describe your task or ask a question... [▶](#)

ASK AGENT IN THE CHAT

Agentforce Builder

Agentforce Service Agent

Version 1 (Active) ▾

⚙ Settings

? Help ▾

Batch Test

Deactivate

ics



age the topics assigned to your agent. To make changes, agent must be deactivated.

Search topics...



ms • Sorted by Topic Label(asc)

Label ↑ ▾

a Menu ▾

General FAQ ▾

▾ "Barista menu"

Plan ID: 0df1f6baf95e

User Prompt

Barista menu

⚡ **Reasoning: Topic Selection**

⌚ 0.41 sec

> **Prompt Used**

Topic Selected: Barista Menu (*Barista_Menu*)

This topic handles user inquiries related to the barista menu, including available drinks, ingredients, and customization options.

> **Instructions** 5

> **Actions** 1

⚡ **Reasoning: Action Selection**

⌚ 3.32 sec

> **Prompt Used**

Conversation Preview

information. If you have any questions about the menu or need help with customization, feel free to ask!



Barista menu

Here's a general overview of a typical barista menu:

1. Espresso Drinks:

- **Espresso:** A strong coffee brewed by forcing hot water under pressure through finely-ground coffee beans.
- **Americano:** Espresso with added hot water.
- **Latte:** Espresso with steamed milk and a small amount of milk foam.
- **Cappuccino:** Espresso with equal parts steamed milk and milk foam.
- **Macchiato:** Espresso with a small amount of milk foam.


2. Coffee Drinks:

- **Brewed Coffee:** Regular coffee made by brewing ground coffee beans.
- **Cold Brew:** Coffee brewed with cold water over an extended period.
- **Iced Coffee:** Brewed coffee served over ice.








3. Tea Drinks:

Describe your task or ask a question...

SETUP > ALL SITE > CLICK NEW



Search Setup



Setup

Home

Object Manager


all site

Feature Settings

Digital Experiences

All Sites

Didn't find what you're looking for?
Try using Global Search.

SETUP

All Sites

Digital Experiences

Visit our Trailblazer CommunityHelp for this Page

The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the [Digital Experience app in Lightning Experience](#) page to see your archived sites.

Maximum number of published and unpublished sites: 100

All Sites

New

CHOOSE TEMPLATE FOR SITE

[← Back to Setup](#)



[Help & Training](#)

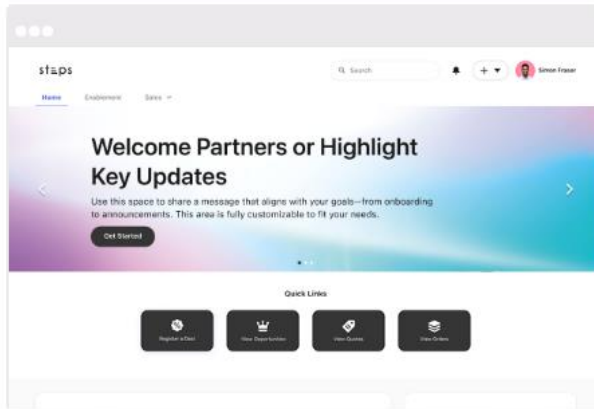
Choose the Experience You Love

Browse by:

[All](#) [Marketing](#) [Sales](#) [Service](#)

Partner Central (Enhanced)

by Salesforce



Onboarding • Channel Sales •
Collaboration & Support • Analytics

With our new and enhanced template, build and grow a PRM solution that evolves at the speed of business with Lightning...

Microsite (LWR)

by Salesforce



Enhanced



Simplified Lead Capture • Lightning-Fast Experience •
Customizable Components

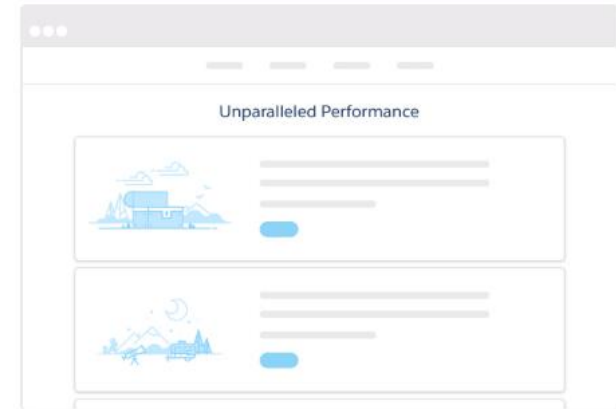
Available to Experience Cloud customers, deliver content-rich microsites that capture leads. Built on the Lightning Web...

Build Your Own (LWR)

by Salesforce



Enhanced



Unparalleled Performance •
Standards-Based Customization •

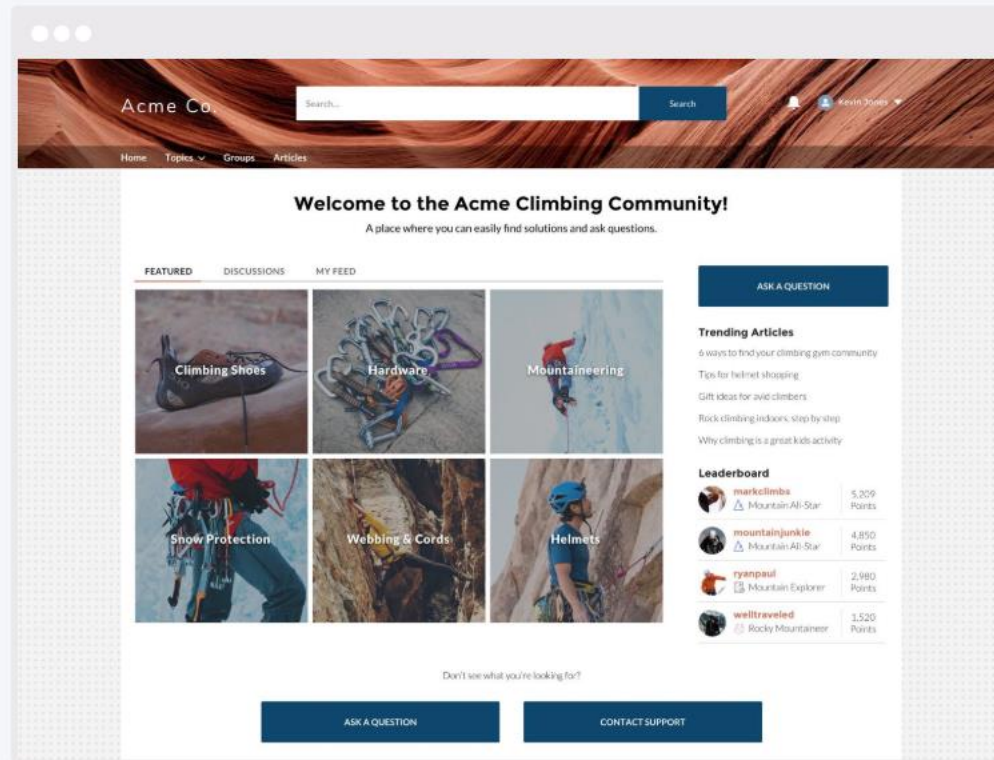
Develop blazing fast digital experiences, such as websites, microsites, and portals, using the Lightning Web...

SELECT GET STARTED

← Back



Help & Training



Customer Service

by Salesforce



Get Started

About This Template

Create a responsive site that lets members post questions, access relevant content and records, view articles, collaborate, and create support cases.

Features

Self-Service

Give access to articles, Q&A, and cases.

Collaboration

Use groups, discussions, and topics to organize content and solve issues quickly.

Customization

Use Experience Builder to brand your site, add ready-made Lightning components, and take advantage of custom Lightning components, layouts, and themes.

Intelligence

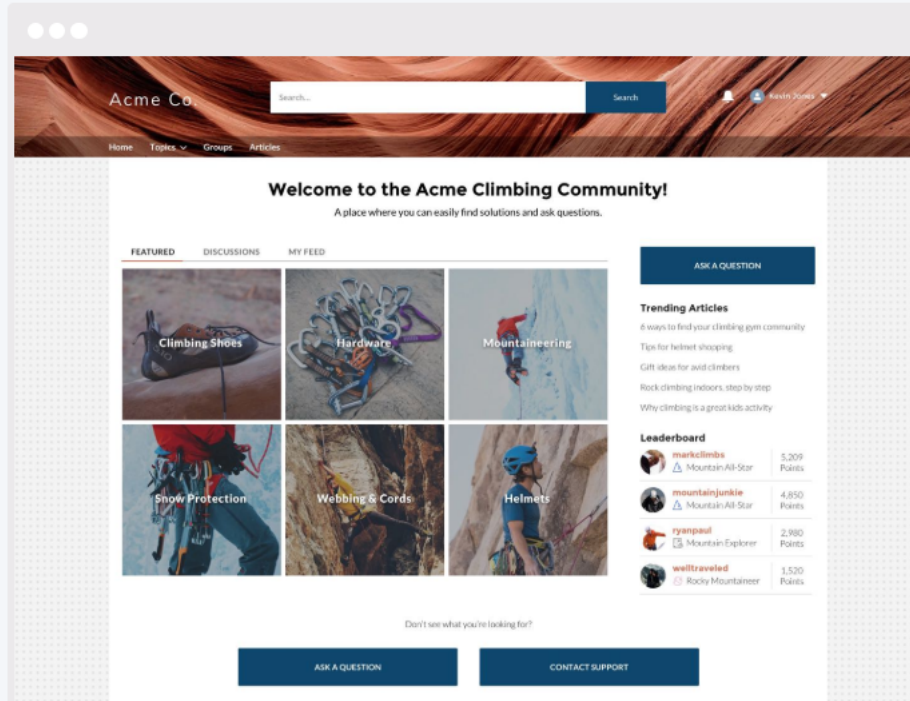
Personalize the member experience, automatically escalate important cases, and create a safe haven with rules to keep out trolls and bots.

ENTER NAME AND URL

← Back



Help & Training



Enter a Name

Not sure what to enter? Don't worry—you can always change it later.

Name

ehr

URL

orgfarm-f8f9335c45-dev-ed.develop.my.site.co...

ehr

Create

SITE > WORKSPACE > ADMINISTRATOR



Workspaces
ehr



smriti sharan

ehr (Active · Published)

[Add Metrics](#)

See your favorite metrics right here by getting the latest AppExchange package.

[Install AppExchange Package](#)

My Workspaces



Builder

Build, brand, and customize your site's pages.



Moderation

Monitor posts and comments, create rules.



Content Management

Organize, manage, and build collections for your Experience Cloud site.



Gamification

Keep your members engaged with recognition badges.



Dashboards

Examine the health of your site with reports and dashboards and engage with members.



Administration

Configure settings and properties for your experience.

Quick Links

[Experience Pulse Metrics](#)

[Lightning Carousel and Banner Components](#)

[Create Lightning Web Runtime Sites](#)

[Set Up and Manage Experience Cloud Sites](#)

[AppExchange](#)

Lightning Web Runtime for
Experience Cloud

[START LEARNING >](#)



'25

Salesforce Summer '25 Release Notes

javascript:void(0);

ADMINISTRATOR > ACTIVATE



Administration
ehr



smriti sharan

Settings

Preferences

Members

Contributors

Login & Registration

Emails

Pages

Rich Publisher Apps

URL Redirects

Settings

ehr



<https://orgfarm-f8f9335c45-dev-ed.develop.my.site.com/ehr>

Status

Active

Deactivate

Template

Customer Service

Change Template

ENABLE OMNI CHANNEL



Setup Home Object Manager

Feature Settings

OmniChannel Inventory

Service

Omni-Channel

Limits

Omni-Channel Home

Omni-Channel Settings

Presence Configurations

Presence Decline Reasons

Presence Statuses

Routing Configurations

Service Channels

Supervisor

Supervisor Configurations

Supervisor Settings

Didn't find what you're looking for?
Try using Global Search.



SETUP

Omni-Channel Settings

Omni-Channel Settings

Omni-Channel routes work items to your support agents. It sets agent capacity for accepting work and agent availability.

To access the latest Omni-Channel features, turn on enhanced routing. You can turn it on and off, but some advanced features are available only with enhanced routing. If you have standard messaging channels or any version of Chat, or use standard bots, you can't use enhanced routing and must turn it off. [Learn About Enhanced Routing in Salesforce Help](#)

Enhanced Omni-Channel Routing



! = Required Information

Enable Omni-Channel  

Enable Skills-Based and Direct-to-Agent Routing ☐

Enable Secondary Routing Priority ☐

Enable Status-Based Capacity Model ☐

Define login behavior when an agent using Omni-Channel opens a new window or tab


- ☒ Automatically log agents in to Omni-Channel in the new window or tab
- ☐ Warn agents in a popup that open tab-based work will be terminated
- ☐ Don't automatically log agents in to Omni-Channel on a new window or tab

Save Cancel

SETUP ROUTING COUNFIGURATION

- Feature Settings
 - Service
 - Omni-Channel
 - Routing Configurations

Didn't find what you're looking for?
Try using Global Search.

 SETUP

Routing Configurations

[« Back to List: Routing Configurations](#)

Basic Information

EditDelete

Routing Configuration Name	messaging
Developer Name	messaging
Overflow Assignee	

▼ Routing Settings

Routing Priority	1
Routing Model	Most Available
Push Time-Out (seconds)	
Units of Capacity	2.00
Percentage of Capacity	
Capacity Type	Inherited

▼ Related Queues

Label	Queue Name	Queue Email
messaging.queue	messaging_queue	

SETUP FALLBACK QUEUE

queue

Users

Queues

Environments

Jobs

Apex Flex Queue

Didn't find what you're looking for?
Try using Global Search.

SETUP

Queues

Edit Queue

messaging queue

Help for this Page

Queue Edit

Save

Cancel

Queue Name and Email Address

Required Information

Enter the name of the queue and the email address to use when sending notifications (for example, when a case has been put in the queue). The email address can be for an individual or a distribution list. When an object is assigned to a queue, only the queue members will be notified.

Label

messaging queue

Queue Name

messaging_queue

Queue Email

Send Email to Members

☐

Queue Description

Configuration with Omni-Channel Routing

If your organization uses Omni-Channel, you can link queues to a routing configuration. This will push work from the queue to agents in the Console. See our [help](#) for more information about Routing Configurations.

Routing Configuration

messaging

Supported Objects

Select the objects you want to assign to this queue. Individual records for those objects can then be owned by this queue.

Available Objects

Account Brand

Activation Target

Agent Work

Selected Objects

Messaging Session

ADD USER TO THE QUEUE

Users

Queues

Environments

Jobs

Apex Flex Queue

Didn't find what you're looking for?
Try using Global Search.

SETUP Queues

Authorization Form Consent	Remove	
Authorization Form Data Use		
Business Brand		
Buyer Group		
Case		
Change Request		
Channel Program		

Queue Members

To add members to this queue, select a type of member, then choose the group, role, or user from the "Available Members" and move them to the "Selected Members." If the sharing model for all objects in the Queue is Public Read/Write/Transfer, you do not need to assign users to the queue, as all users already have access to the records for those objects.

Search: for:

Available Members

User: EinsteinServiceAgent User ▲
User: Integration User
User: OrgFarm EPIC
User: Security User

Selected Members

smriti sharan ▲

Add



Remove

Save

Cancel

GO TO FLOW > CREATE OMNI CHANNEL FLOW

←

≡

Flow Builder

↶ ↷

📄 ↻

⚙️

Free-Form ▾

🏠

Run

Debug

Save As

✕

Version ▾

Save

Activate

Enable flow scrollability ☒ ?

Toolbox

Elements

Manager

New Automation

View All Automations

Showing 1 of 74 results for 'omni'

🔍 omni ✕

Filter By ☒ Triggered ☒ Scheduled ☒ Screen ☒ AutoLaunched

Types (1)

🔗

Omni-Channel Flow

Define business and routing rules for service channel conversations.


Templates (0)



No results for 'omni'

Back

CREATE NEW RESOURCE


←


 Flow Builder

  Select Elements


↶

↷






Auto-Layout ▾




Toolbox


×


Manager

 Search this flow...


New Resource

 Omni-Channel Flow
Start



 End

—



+

CREATE RECORDED VARIABLE

←

≡ Flow Builder

Enable flow scrollability ☒ ?

☐

Select Elements

↶ ↷

⊘

⚙

Auto-Layout ▾

🏠

✕

Debug

Save As New Version ▾

Save

Activate

Toolbox

Manager

Search this flow...

New Resource

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

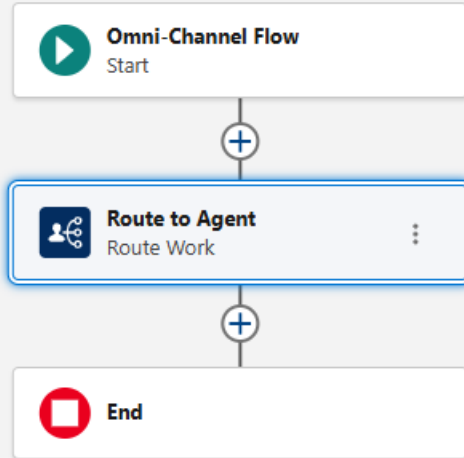
☐ Available for output

Cancel

Done

− ↶ +

CREATE ROUTE TO AGENT ELEMENT



Route Work

Set Input Values

* How Many Work Records to Route? ⓘ

- ☒ Single
☐ Multiple

* Record ID Variable

{!recordId}

* Service Channel

Messaging

* Route To

Agentforce Service Agent

* Agentforce Service Agent ⓘ

Agentforce Service Agent

Fallback Queue

- ☒ Select Queue
☐ Use Variable

* Fallback Queue ID

messaging queue

Set Additional Input Values

GO TO AGENTFORCE > SEE FLOW IN CONNECTION

Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Service Cloud Reports

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

javascript:void(0)

SETUP > AGENT DETAILS

Agentforce Service Agent

Version 1 (Active)

Open in Builder

API Name

Type

Active

Agentforce_Service_Agent

Service Agent

☒

Details

Topics

System Messages

Language Settings

Connections

Turn on adaptive response formats

Adaptive response formats help your agent optimize responses for a specific experience. To use them in agent responses, create custom agent actions that return the required information. It can take the agent an extra second to craft and deliver formatted responses. [Learn More in Help](#)

> What are adaptive response formats?

Go to Flow Builder

Omni-Channel Flow

Status

Connections

Agentforce Omni Smriti

Active

Connections

Add

SETUP > MESSAGING SESSIONS >

TURN ON

Feature Settings

Service

Embedded Service

Messaging for In-App and Web User Verification


Messaging

Messaging Components

Messaging Settings


Regulatory Compliance


Didn't find what you're looking for?

 SETUP


Messaging Settings

Give customers and agents a rich, efficient service experience with Enhanced Messaging. Create one or more channels to message with customers.



Messaging  On

 Channels

[Channel List](#) [Bulk Update](#) [Refresh](#) [New Channel](#)



1 item • Sorted by Channel Name • Filtered by All messaging channels

CREATE NEW CHANNEL

The screenshot displays the Salesforce Setup interface with a modal window titled "Add a Messaging Channel". The modal contains the following elements:

- Title:** Add a Messaging Channel
- Section Header:** Get the conversation rolling
- Description:** Give your customers more ways to connect with you. Messaging lets customers contact you via conversation channels, so they can reach you in the way that's most convenient for them.
- Illustration:** A graphic showing a smartphone and a tablet displaying messaging interfaces, with speech bubbles floating above them.
- Progress Bar:** A progress bar at the bottom of the modal, currently at the start.
- Start Button:** A blue button labeled "Start" at the bottom right of the modal.

The background interface shows the "Setup" menu on the left with "Messaging" selected. The main content area displays the "Messaging" setup page, which includes a toggle for "Messaging" (currently "On") and a "Channels" section. The "Channels" section shows a table with one item, "Messaging Service A".

Channel Name
1 Messaging Service A

SELECT MESSAGING AND WEB

The image shows a software setup window titled "Add a Messaging Channel". The background interface includes a "Setup" menu with options like "Home", "Object Manager", and "messaging". A sidebar on the left lists "Feature Settings" with sub-items: "Service", "Embedded Service", "Messaging for In-App and Web User Verification", "Messaging", "Messaging Components", "Messaging Settings", and "Regulatory Compliance". The main content area shows a "Messaging" section with a toggle switch set to "On" and a "Channels" section with a table listing one item: "Messaging Service A".

The "Add a Messaging Channel" dialog is centered and contains the following elements:

- Title:** Add a Messaging Channel
- Section Header:** Native Messaging Channels
- Instruction:** Select from our native channel types.
- Channel Options:**
 - WhatsApp (Green speech bubble icon)
 - Messaging for In-App and Web (Pink speech bubble icon)
 - SMS Text Messaging (Green square with SMS icon)
 - Facebook Messenger (Blue speech bubble icon)
 - Apple Messages for Business (Green speech bubble icon)
 - LINE (Green square with LINE icon)
- Navigation:** A "Back" button, a progress indicator with four steps (the first is checked), and a "Next" button.

The background interface also features a search bar at the top, a "Channel List" button, a "Bulk Update" button, and a "New Channel" button. A table at the bottom shows a list of channels with columns for "Unified ...", "Modifie...", and "Modified On".

ADD DETAILS TO MESSAGING CHANNEL

Object Manager

Search Setup

✕

★ + ? ⚙️ 1

SETUP

Messaging S

Give customers and agents a

Messaging ☒ On

Channels

1 item • Sorted by Channel Name

Channel Name
1 Messaging Service A

Add a Messaging Channel

Name your channel

Create a Channel Name and a unique Developer Name.

* Channel Name

Messaging Service Agent

* Developer Name

Messaging_Service_Agent

* Deployment Type

Web

* Domain ⓘ

my.site.com

Back

✓

✓

●

○

Next

ADD CHANNEL ROUTING AS FLOW

ADD CHANNEL ROUTING AS FLOW

Setup | Home | Object Manager

Search Setup

Channel Routing

Select and configure channel routing

Routing Type: Omni-Flow

* Flow Definition: Agentforce Omni Smriti

* Fallback Queue: messaging queue

Back | Save

Feature Settings

- Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
 - Messaging
 - Messaging Components
 - Messaging Settings
 - Regulatory Compliance

Didn't find what you're looking for? Try using Global Search.

Channels

1 item • Sorted by Channel Name

Channel Name
1 Messaging Service A

Channel List | Bulk Update | New Channel

Search this list...

Unified ...	Modifie...	Modified On
<input type="checkbox"/>	smr	7/16/2025, 8:43 AM

GO BACK TO SITES

site

- Feature Settings
- Digital Experiences

All Sites

- User Interface
- Sites and Domains

- Custom URLs
- Domains
- Sites

- Security
- Remote Site Settings
- Trusted URLs

Didn't find what you're looking for?
Try using Global Search.



SETUP

All Sites

Digital Experiences

Visit our Trailblazer CommunityHelp for this Page

The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the Digital Experience app in Lightning Experience page to see your archived sites.

Maximum number of published and unpublished sites: 100

All Sites						New	
Action	Name	Description	Framework	URL	Status		
Workspaces Builder	ESW_Messaging_Service_Agen_1752680615718	Site for Messaging for Web deployment: Messaging_Service_Agent.	Lightning Web Runtime	https://orgfarm-f8f9335c45-dev-ed.develop.my.site.com/ESWMessagingServiceAgen1752680615718	Active	⚡ Enhanced	
Workspaces Builder	ehr		Aura	https://orgfarm-f8f9335c45-dev-ed.develop.my.site.com/ehr	Active		

ID DRO

Home

Preview

Publish

Components

Q messaging

✕

Files (0)

Gamification (0)

Layout (0)

Messages (0)

Mobile Publisher (0)

Process Automation (0)

Records (0)

Sales (0)

Support (1)

Embedded Messaging

Topics (0)

Other Components (0)

Get more on the AppExchange

Template Header Top

SEARCH

1

USER17526... ▾

Template Header Bottom

WELCOME!

A place where you can easily find solutions and ask questions

MY FEED

ASK A QUESTION

Embedded Messaging

Embedded Messaging

* Embedded Web Deployment

Messaging_Service_Agent ▾

* Enhanced Service URL

https://orgfarm-f8f9335c45-dev-ed.devel... ▾

* Site Endpoint

ESW_Messaging_Service_Agen_17526806... ▾

Chat Button Visibility

Default Visibility ▾

☐ Add credential-based user verification

GO TO SITE > CHAT AT BOTTOM RIGHT

SEARCH



USER17526... ▾



HOME

WELCOME!

A place where you can easily find solutions and ask questions

FEATURED

DISCUSSIONS

MY FEED

ASK A QUESTION

Don't see what you're looking for?

ASK A QUESTION

CONTACT SUPPORT



The image is a screenshot of a web application interface. At the top, there is a large blue header with the text "CHAT WITH AGENTFORCE AND SEE MAGIC". Below the header is a navigation bar with a search bar and a "SEARCH" button. The search bar contains the text "Search...". To the right of the search bar is a user profile icon with the text "USER17526...". Below the navigation bar is a main content area with a "WELCOME!" message and a subtitle "A place where you can easily find solutions and ask questions". There are three tabs: "FEATURED", "DISCUSSIONS", and "MY FEED". The "FEATURED" tab is selected. Below the tabs is a section with the text "Don't see what you're looking for?" and two buttons: "ASK A QUESTION" and "CONTACT SUPPORT". On the right side of the page, there is a chat window titled "Agentforce Service Agent". The chat window shows a message from the agent: "hi barista menu and price". Below this is a response from the user: "Our barista menu includes a variety of delicious drinks. Here's a list of some popular options along with their prices: 1. Espresso - \$2.50 • A strong and rich coffee shot. 2. Americano - \$3.00 • Espresso with hot water." The chat window has a "Type your message..." input field at the bottom.

SEARCH

USER17526...

FEATURED

MY FEED

ASK A QUESTION

A place where you can easily find solutions and ask questions

Don't see what you're looking for?

ASK A QUESTION

CONTACT SUPPORT

Agentforce Service Agent • 9:25 PM

hi barista menu and price

Our barista menu includes a variety of delicious drinks. Here's a list of some popular options along with their prices:

1. **Espresso** - \$2.50
 - A strong and rich coffee shot.
2. **Americano** - \$3.00
 - Espresso with hot water.

Type your message...

By Smriti Sharan

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[sfdc amplified](#)



“

AI is probably the most important thing humanity has ever worked on. I think of it as something more profound than electricity or fire.”

Sundar Pichai
(CEO, Google)

”

