

STEP BY STEP AGENTFORCE SETUP AND DEPLOYMENT ON SITE

(IMAGE FOR EVERY SINGLE STEP)

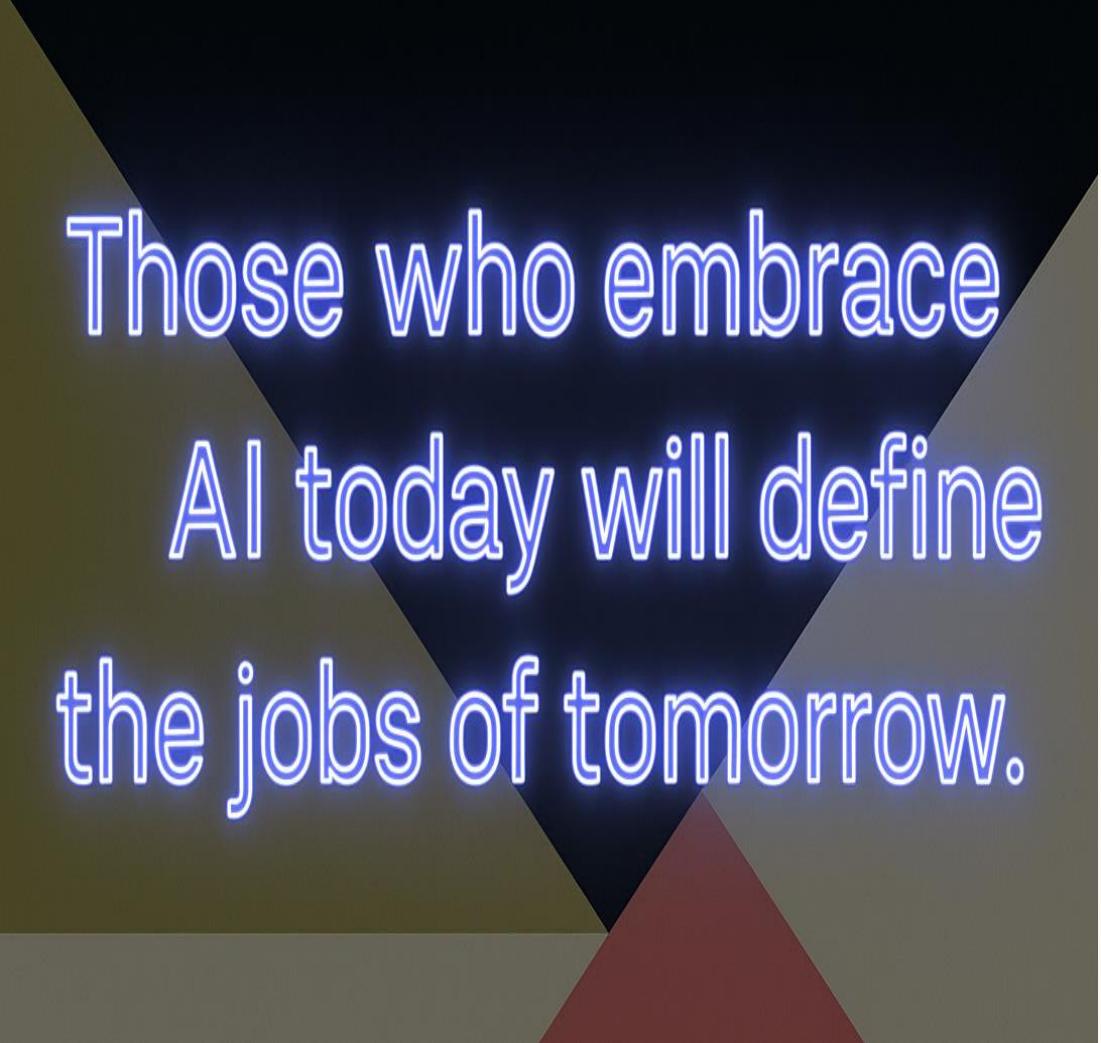
By Smriti Sharan

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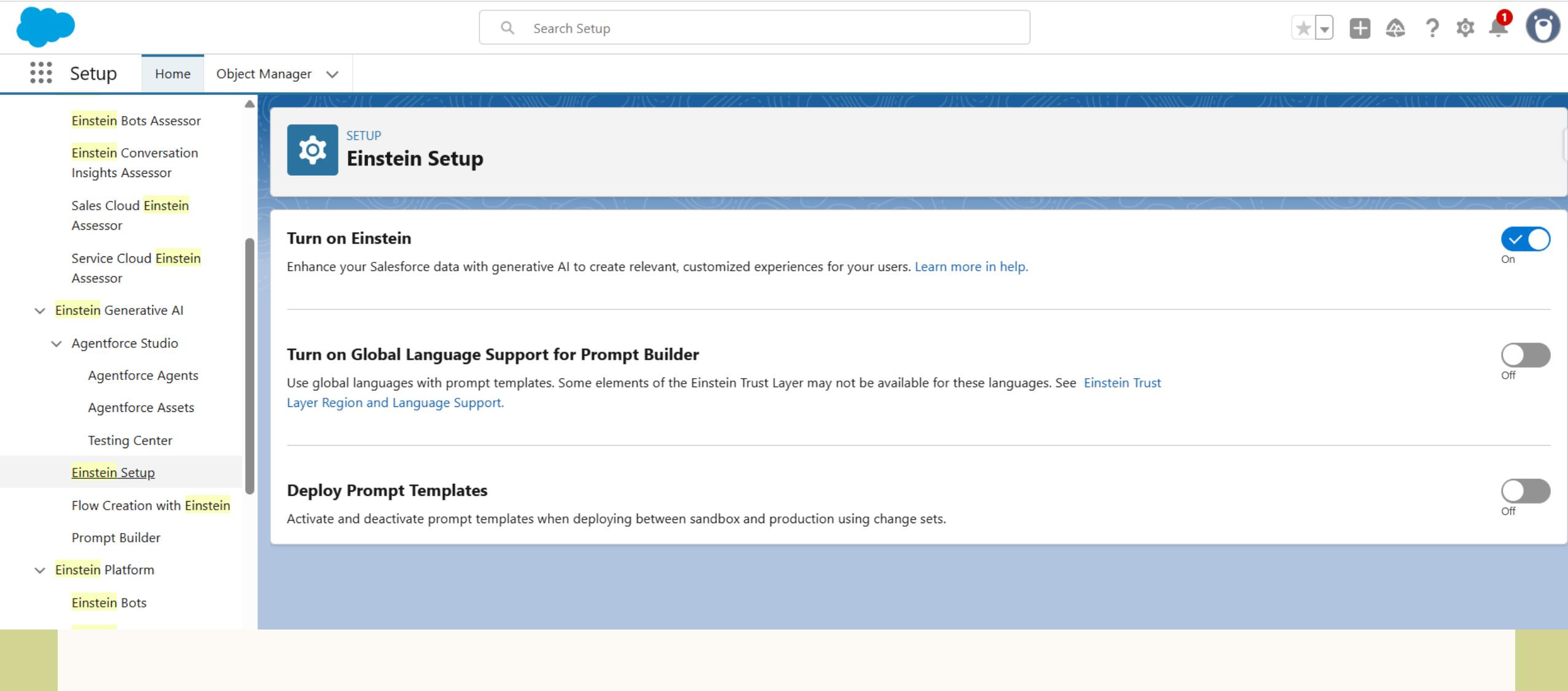
AGENDA

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



The image shows the Salesforce Setup interface with the following details:

- Left Navigation Bar:** Shows the "Setup" tab is selected. Other tabs include "Home" and "Object Manager".
 - Einstein Bots Assessor**
 - Einstein Conversation Insights Assessor**
 - Sales Cloud Einstein Assessor**
 - Service Cloud Einstein Assessor**
 - Einstein Generative AI** (expanded):
 - Agentforce Studio**
 - Agentforce Agents**
 - Agentforce Assets**
 - Testing Center**
 - Einstein Setup** (selected)
 - Flow Creation with Einstein**
 - Prompt Builder**- Einstein Platform** (expanded):
 - Einstein Bots**

Einstein Setup (Main Content Area):

- 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

Cloud Search Setup Object Manager

Setup Home Object Manager

agentforce agent

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

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

  On

Cloud Search Setup Object Manager

SELECT AGENTFORCE SERVICE AGENT

Agentforce Builder New Agent ? Help ▾

Cancel Next

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.

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



Back

Next

Steps

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

Escalation

+ Add

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

General FAQ

✓ Added

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](#)

Service Customer Verification

+ Add

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](#)

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 i

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 i

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

156 characters remaining

* Company i

barista

248 characters remaining

* Agent User i

EinsteinServiceAgent User (agentforce_service_agent@00dgk0000071z0b.ext)

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

[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

← Agentforce Builder New Agent ? Help ▾

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](#)

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

X

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

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

Add Instructions

Back

Next

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.

Batch Test

Activate

Settings

Help

Conversation Preview

Let's chat!

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

Describe your task or ask a question...

Batch Test

Activate

Settings

Help

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

← Agentforce Builder Agentforce Service Agent Vers. ✓ Your preview conditions were applied and a new session was started. X ⚙ Settings ? Help ▾

Batch Test Deactivate

Topics

← Topic Details

Topic Configuration This Topic's Actions

You're customizing

Barista Menu

* Name Barista Menu

* API Name Barista_Menu

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

* Scope i
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) Plan ID: 0df1f6baf95e

Batch Test Deactivate

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!

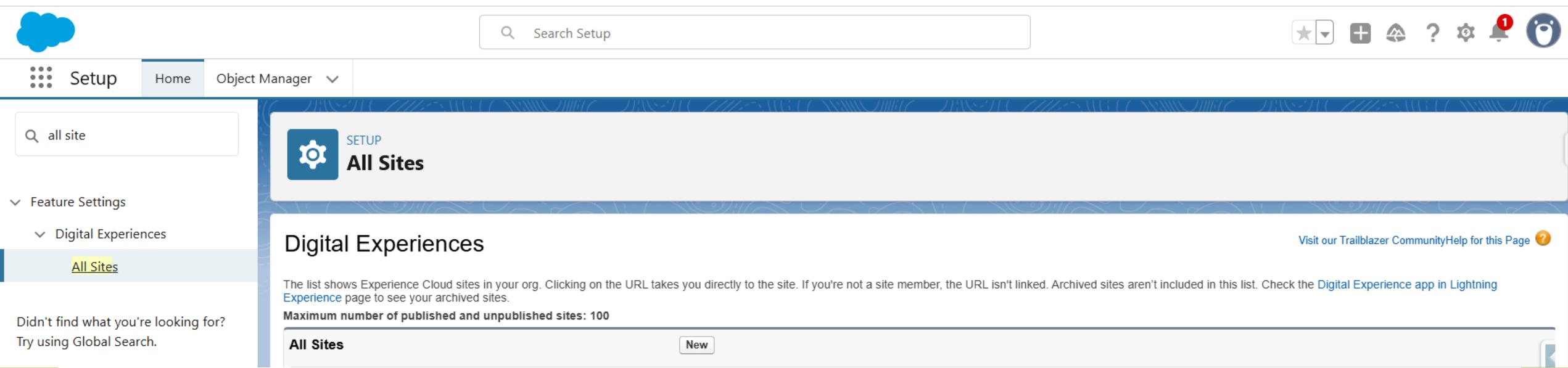
Barista menu

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

- 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.
- 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.

Describe your task or ask a question...

SETUP > ALL SITE > CLICK NEW



The screenshot shows the Salesforce Setup interface. The top navigation bar includes a blue cloud icon, a search bar with the placeholder "Search Setup", and various global buttons. The main menu bar has "Setup" selected, followed by "Home" and "Object Manager". A sidebar on the left contains a search bar with the query "all site", a "Feature Settings" section, a "Digital Experiences" section with "All Sites" selected, and a message about global search. The main content area is titled "All Sites" under "SETUP" and "Digital Experiences". It includes a note about Experience Cloud sites, a maximum of 100 sites, and buttons for "All Sites" and "New". A small note in the top right corner directs users to the Trailblazer Community Help for this page.

Setup

Home

Object Manager

Search Setup

all site

Feature Settings

Digital Experiences

All Sites

SETUP

All Sites

Digital Experiences

Visit our Trailblazer Community Help 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](#)

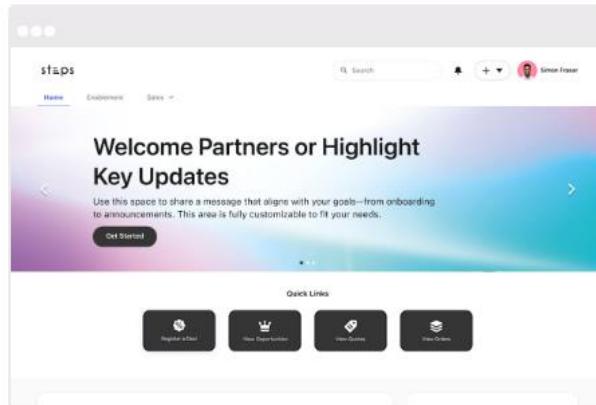
Choose the Experience You Love

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](#)

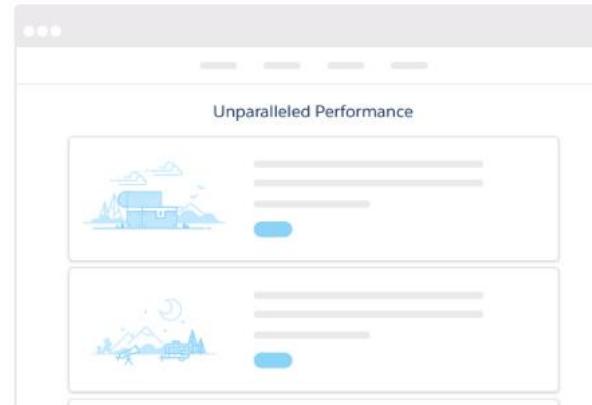


Simplified Lead Capture • Lightning-Fast Experience •
Customizable Components

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

Build Your Own (LWR)

by [Salesforce](#)



Unparalleled Performance •
Standards-Based Customization •

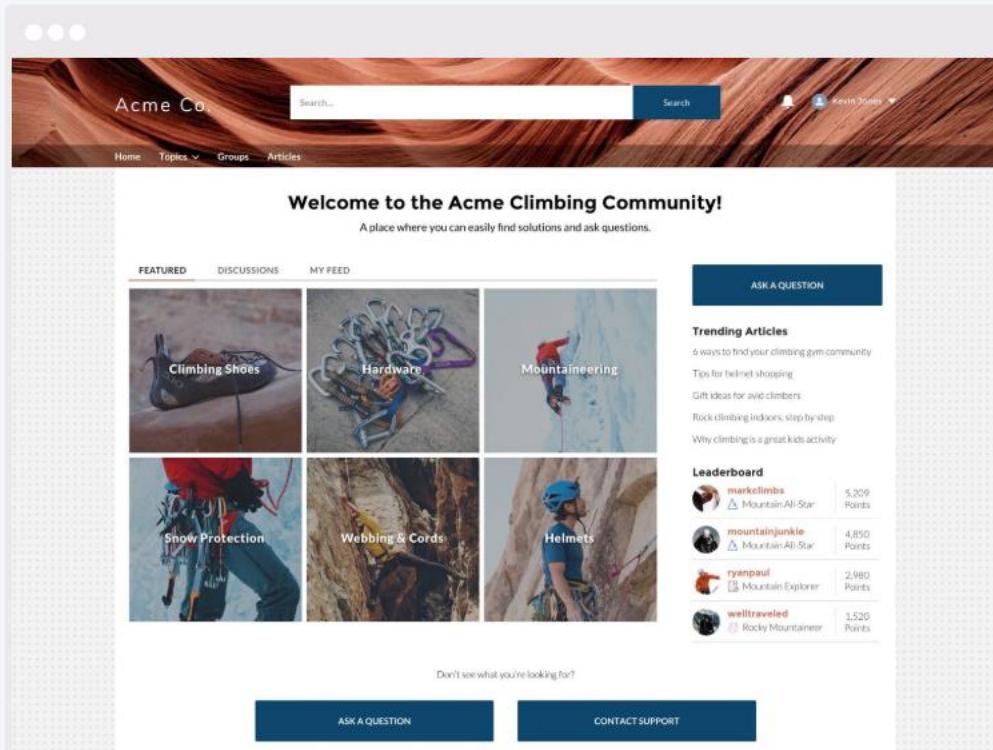
Develop blazing fast digital experiences, such as websites, microsites, and portals, using the Lightning Web...

SELECT GET STARTED

← Back



Help & Training

A screenshot of the Acme Climbing Community homepage. The header features the "Acme Co." logo, a search bar, and a "Search" button. The main content area is titled "Welcome to the Acme Climbing Community!" with a subtitle "A place where you can easily find solutions and ask questions." It includes sections for "FEATURED" (Climbing Shoes, Hardware, Mountaineering), "DISCUSSIONS" (Snow Protection, Webbing & Cords, Helmets), and "MY FEED". A "ASK A QUESTION" button is prominently displayed. To the right, there's a "Trending Articles" sidebar with links to "6 ways to find your climbing gym community", "Tips for helmet shopping", "Gift ideas for avid climbers", "Rock climbing indoors: step by step", and "Why climbing is a great kids activity". A "Leaderboard" section shows user profiles: markclimba (5,259 Points), mountainjunkie (4,890 Points), ryancpaul (2,980 Points), and welltraveled (1,520 Points). At the bottom, there are "ASK A QUESTION" and "CONTACT SUPPORT" buttons.A screenshot of the same Acme Climbing Community homepage as above, but with a different background image showing a person climbing a rock face.

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

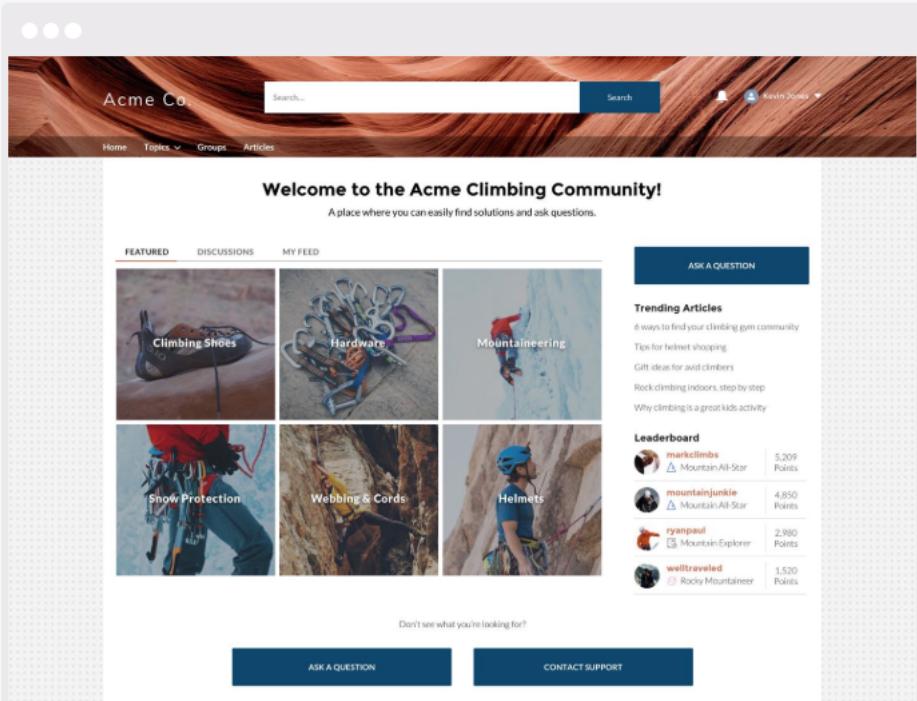
Personalize the member experience, automatically escalate important cases, and create a safe haven with rules to keep out trolls and bots.

ENTER NAME AND URL

← Back



Help & Training

A screenshot of the Acme Climbing Community homepage. The page features a header with the Acme Co. logo, a search bar, and a user profile for Kevin Jones. Below the header is a banner with the text "Welcome to the Acme Climbing Community! A place where you can easily find solutions and ask questions." The main content area includes a "FEATURED" section with images of climbing shoes, hardware, and mountaineering. There are also sections for "DISCUSSIONS" and "MY FEED". A sidebar on the right shows "Trending Articles" and a "Leaderboard" with users like markilmbs, mountainjunkie, ryancpaul, and welltraveled. At the bottom are "ASK A QUESTION" and "CONTACT SUPPORT" buttons.

Enter a Name

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

Name

A text input field containing the text "ehr".

URL

A text input field containing the URL "orgfarm-f8f9335c45-dev-ed.develop.my.site.co...".A small blue icon with a white "C" shape, representing a copy or link function.

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

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

Cloud icon

Search Setup

Setup Home Object Manager ▾

omni

Feature Settings

- Omni-channel 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 On

Enable Omni-Channel Required Information

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

routing

Feature Settings

Service

Omni-Channel

Routing Configurations

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

The screenshot shows a software interface for 'SETUP' with a search bar at the top. The left sidebar has a 'Feature Settings' section with 'Service' and 'Omni-Channel' collapsed, and 'Routing Configurations' selected, which is highlighted with a yellow box. Below the sidebar is a message: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Routing Configurations' and shows a single configuration named 'messaging'. It has a 'Basic Information' section with fields for 'Routing Configuration Name' (messaging), 'Developer Name' (messaging), and 'Overflow Assignee'. Below this is a 'Routing Settings' section with fields for 'Routing Priority' (1), 'Routing Model' (Most Available), 'Push Time-Out (seconds)', 'Units of Capacity' (2.00), 'Percentage of Capacity', and 'Capacity Type' (Inherited). The 'Related Queues' section shows a table with one row, 'messaging_queue', under 'Label' and 'messaging_queue' under 'Queue Name'. There are 'Edit' and 'Delete' buttons above the 'Basic Information' section.

Routing Configurations

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

Basic Information	
Routing Configuration Name	messaging
Developer Name	messaging
Overflow Assignee	

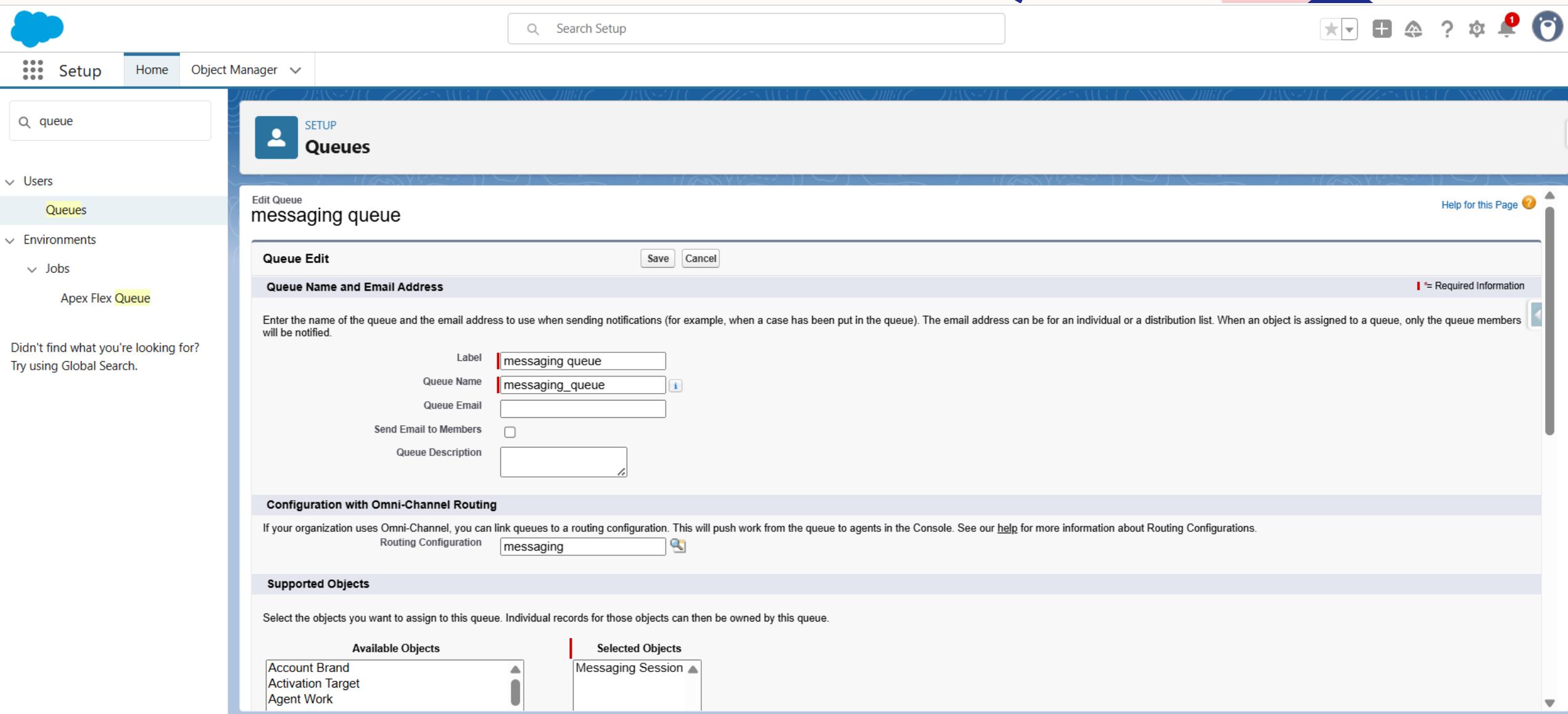
Routing Settings

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	

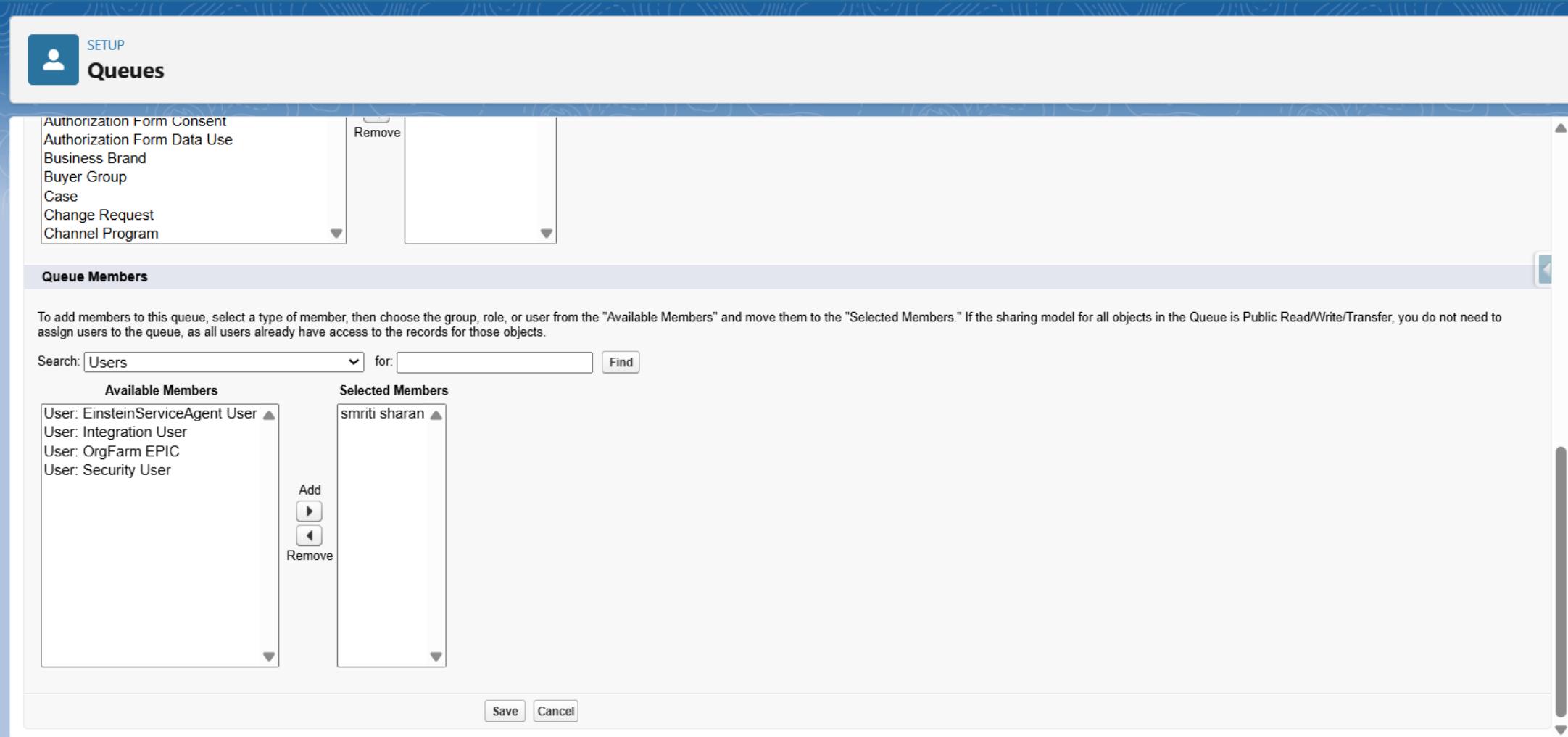
SETUP FALBACK QUEUE



The image shows the Salesforce Setup interface with the following details:

- Header:** The title "SETUP FALBACK QUEUE" is displayed prominently at the top center. The Salesforce logo is in the top-left corner, and a search bar with "Search Setup" is in the top-right.
- Navigation:** The top navigation bar includes "Setup", "Home", and "Object Manager".
- Left Sidebar:** A sidebar on the left lists "Users" (Queues is selected), "Environments", and "Jobs". Below this, a note says "Didn't find what you're looking for? Try using Global Search."
- Central Content:** The main area is titled "Queues" under "SETUP". It shows a list item for "messaging queue".
- Form:** A "Queue Edit" form is open for "messaging queue".
 - Queue Name and Email Address:** The "Label" is "messaging queue", "Queue Name" is "messaging_queue", and "Queue Email" is empty. A checkbox for "Send Email to Members" is unchecked. A "Queue Description" text area is empty.
 - Configuration with Omni-Channel Routing:** A "Routing Configuration" dropdown is set to "messaging".
 - Supported Objects:** A table shows "Available Objects" (Account Brand, Activation Target, Agent Work) and "Selected Objects" (Messaging Session).
- Right Sidebar:** A vertical sidebar on the right contains "Help for this Page" and a "Feedback" icon.

ADD USER TO THE QUEUE



The image shows the Salesforce Queue Members interface. The left sidebar includes a search bar with 'queue', a 'SETUP' icon, and a 'Queues' section under 'Users'. Other sections like 'Environments' and 'Jobs' are also listed. A note at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area has a 'Queue Members' section with a list of available objects: 'Authorization Form Consent', 'Authorization Form Data Use', 'Business Brand', 'Buyer Group', 'Case', 'Change Request', and 'Channel Program'. A 'Remove' button is next to the list. Below this is a 'Queue Members' section with a search bar for 'Users' and a 'Find' button. It shows 'Available Members' (User: EinsteinServiceAgent User, User: Integration User, User: OrgFarm EPIC, User: Security User) and 'Selected Members' (smriti sharan). Buttons for 'Add' and 'Remove' are between the two lists. At the bottom are 'Save' and 'Cancel' buttons.

queue

SETUP

Queues

Users

Environments

Jobs

Apex Flex Queue

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

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

Remove

Queue Members

Search: Users for: Find

Available Members

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

Selected Members

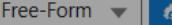
smriti sharan

Add Remove

Save Cancel

GO TO FLOW > CREATE OMNI CHANNEL FLOW

←  Flow Builder Enable flow scrollability ? 

Flow Builder        

Toolbox 

View All Automations
Showing 1 of 74 results for 'omni'
Filter By Triggered Scheduled Screen AutoLaunched

 omni 

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

The screenshot shows the Flow Builder interface. At the top, there's a toolbar with a back arrow, a 'Flow Builder' label, and several icons: a square, a checkmark, a double arrow, a circle with a slash, a gear, and a settings gear. Below the toolbar is a 'Toolbox' section with a 'Manager' tab selected. The 'Manager' tab has a search bar ('Search this flow...') and a 'New Resource' button. The main workspace shows a flow diagram with a rounded rectangle labeled 'Omni-Channel Flow Start' at the top, a blue circle with a plus sign in the center, and a red square with a white end symbol labeled 'End' at the bottom. The flow is represented by a single horizontal line connecting the start and end points. At the bottom of the workspace are zoom and orientation controls: a minus sign, a magnifying glass, and a plus sign.

CREATE RECORDED VARIABLE

Flow Builder

Enable flow scrollability ? ▾

Select Elements

Auto-Layout

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

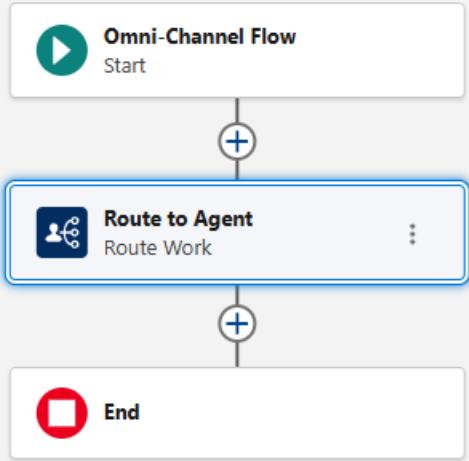
Available for input

Available for output

Cancel Done

This screenshot shows the Salesforce Flow Builder interface with a modal dialog titled 'New Resource'. The 'Resource Type' is set to 'Variable'. The 'API Name' is 'recordId'. The 'Data Type' is 'Text'. The 'Availability Outside the Flow' section has the 'Available for input' checkbox checked. The 'Default Value' field is empty. The 'Done' button is visible at the bottom right of the modal.

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 > AGENT DETAILS

Agentforce Service Agent

Version 1 (Active) Open in Builder

API Name: Agentforce_Service_Agent

Type: Service Agent

Active

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?

Inbound Omni-Channel Flows

Go to Flow Builder

Omni-Channel Flow	Status	Connections
Agentforce Omni Smriti	Active	

Connections

Add

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

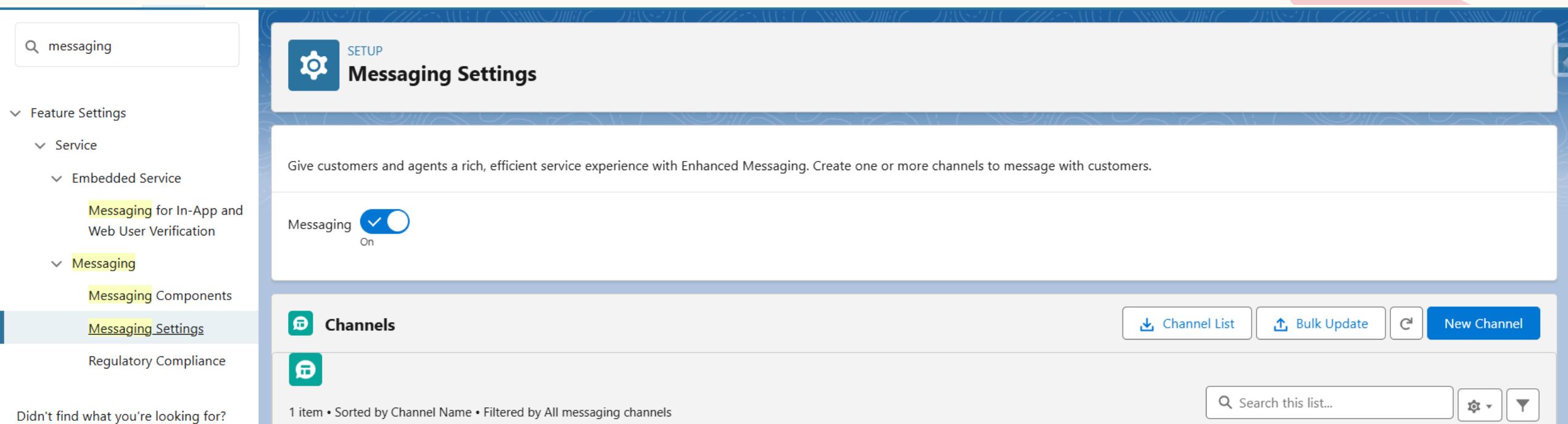
Users

Data

Email

javascript:void(0)

SETUP > MESSAGING SESSIONS > TURN ON



The screenshot shows the 'Messaging Settings' page within the 'SETUP' section of a software interface. The left sidebar has a search bar with 'messaging' and a tree view of feature settings under 'Feature Settings'. The 'Messaging' node is expanded, with 'Messaging Settings' highlighted. The main content area has a title 'Messaging Settings' with a gear icon and a sub-section 'Give customers and agents a rich, efficient service experience with Enhanced Messaging. Create one or more channels to message with customers.' Below this is a 'Messaging' toggle switch set to 'On'. The 'Channels' section shows a table with one item, sorted by Channel Name and filtered by All messaging channels. The table includes columns for Channel Name, Last Activity, and Actions (with icons for Channel List, Bulk Update, and New Channel). A search bar and filter icons are at the bottom of the table.

messaging

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 Name	Last Activity	Actions
1 item • Sorted by Channel Name • Filtered by All messaging channels		

Search this list...

CREATE NEW CHANNEL

Cloud icon

Setup Home Object Manager

Search Setup

Add a Messaging Channel

Get the conversation rolling

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.

Messaging On

Channels

1 item • Sorted by Channel Name

Channel Name ↑

1 Messaging Service A

Start

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.

Channel List Bulk Update New Channel

Unified... Modify... Modified On

smr 7/16/2025, 8:43 AM



SELECT MESSAGING AND WEB

Cloud icon

Setup Home Object Manager

Search bar: messaging

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.

SETUP Messaging S...

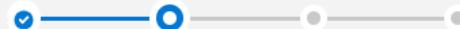
Give customers and agents a...

Messaging On

Channels

1 item • Sorted by Channel Name

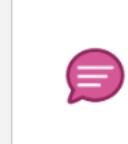
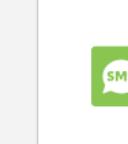
Channel Name
1 Messaging Service A

Back  Next

Add a Messaging Channel

Native Messaging Channels

Select from our native channel types.

 WhatsApp	 Messaging for In-App and Web	 SMS Text Messaging	 Facebook Messenger
 Apple Messages for Business	 LINE		

Channel List Bulk Update New Channel

Unified ... Modified ... Modified On

smr 7/16/2025, 8:43 AM

Cloud icon

ADD DETAILS TO MESSAGING CHANNEL

Search Setup

X

Object Manager

SETUP

Messaging S

Give customers and agents a

Messaging On

Channels

1 item • Sorted by Channel Name

Channel Name ↑

1 Messaging Service A

Channel List

Bulk Update

New Chan

Unified ...

Modifie...

Modified On

smr

7/16/2025, 8:43 AM

Search this list...

Back

Next

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

ADD CHANNEL ROUTING AS FLOW

Setup Home Object Manager X

Search Setup messaging

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.

Give customers and agents a **Messaging** On

Channels 1 item • Sorted by Channel Name Channel Name ↑ 1 Messaging Service A

Add a Messaging Channel

Channel Routing

Select and configure channel routing

Routing Type: Omni-Flow

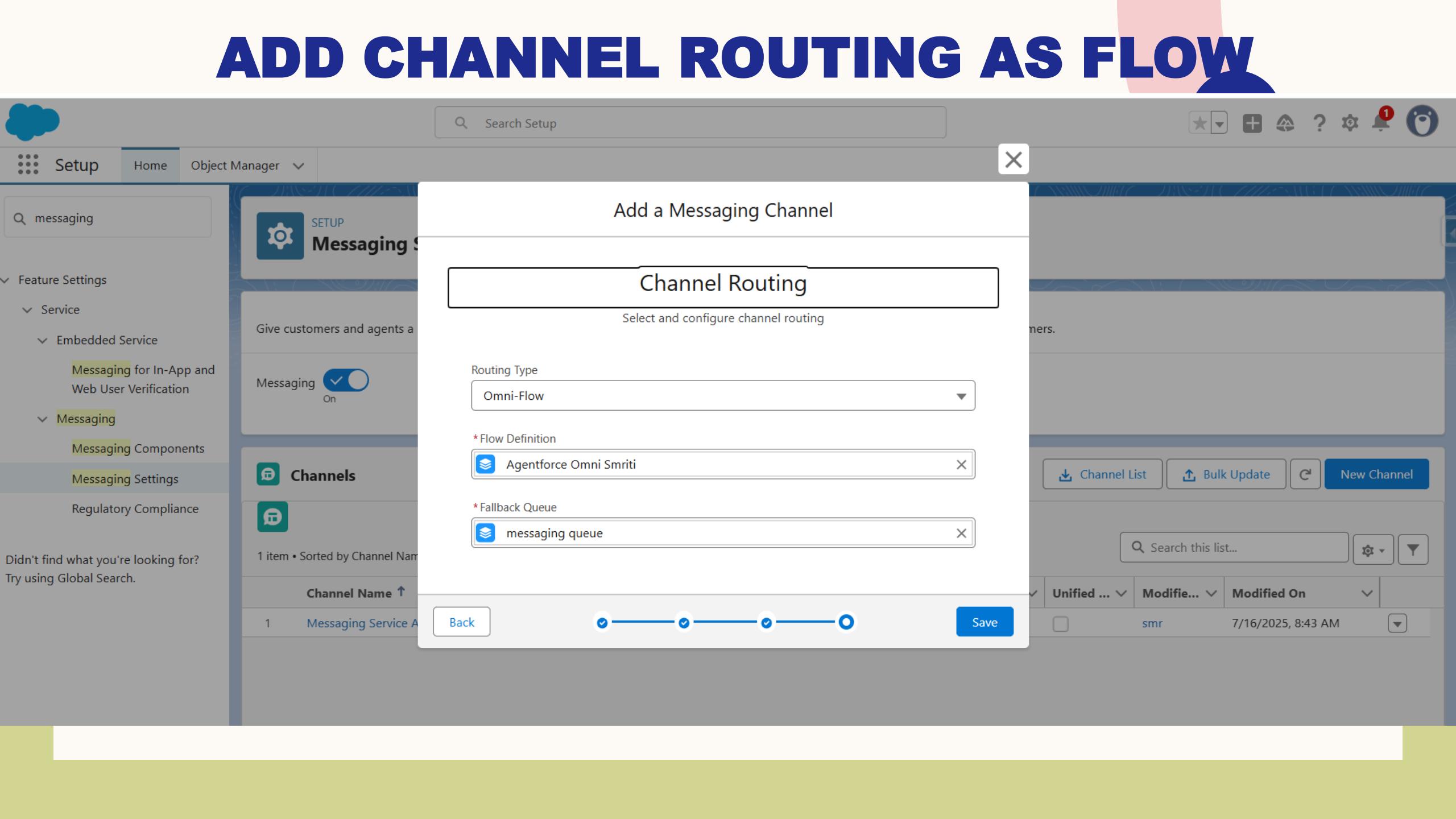
* Flow Definition: Agentforce Omni Smriti

* Fallback Queue: messaging queue

Back Save

Channel List Bulk Update New Channel

Search this list... Unified... Modify... Modified On smr 7/16/2025, 8:43 AM



GO BACK TO SITES

Setup Home Object Manager

site

 **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						
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	 Enhanced	https://orgfarm-f8f9335c45-dev-ed.develop.my.site.com/ESWMessagingServiceAgen1752680615718	Active
Workspaces Builder	ehr		Aura		https://orgfarm-f8f9335c45-dev-ed.develop.my.site.com/ehr	Active

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  Enhanced https://orgfarm-f8f9335c45-dev-ed.develop.my.site.com/ESWMessagingServiceAgen1752680615718 Active

Workspaces | Builder ehr Aura https://orgfarm-f8f9335c45-dev-ed.develop.my.site.com/ehr Active

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

COMPONENT > BUILDER > DRAG AND DROP

The screenshot shows the Oracle ADF Component Builder interface. The top navigation bar includes 'Home', 'Settings', 'Refresh', 'Back', 'Forward', 'Preview', and 'Publish' buttons. The left sidebar has a 'Components' section with a search bar for 'messaging' and a list of categories: 'Files (0)', 'Gamification (0)', 'Layout (0)', 'Messages (0)', 'Mobile Publisher (0)', 'Process Automation (0)', 'Records (0)', 'Sales (0)', 'Support (1)', 'Topics (0)', and 'Other Components (0)'. The 'Support (1)' category is expanded, showing 'Embedded Messaging' selected. A blue button at the bottom of this sidebar says 'Get more on the AppExchange'. The main workspace is divided into two header sections: 'Template Header Top' and 'Template Header Bottom'. The 'Template Header Top' section contains a search bar with a 'SEARCH' button and a user profile for 'USER17526...'. The 'Template Header Bottom' section contains a 'WELCOME!' message, a sub-message 'A place where you can easily find solutions and ask questions', a 'MY FEED' section, and a 'ASK A QUESTION' button. A circular icon in the bottom right corner indicates a pending action. The right sidebar contains sections for 'Embedded Messaging' (with 'Messaging_Service_Agent' selected), 'Enhanced Service URL' (with 'https://orgfarm-f8f9335c45-dev-ed.devel...' selected), 'Site Endpoint' (with 'ESW_Messaging_Service_Agen_17526806...' selected), 'Chat Button Visibility' (with 'Default Visibility' selected), and a checkbox for 'Add credential-based user verification'.

Components

messaging

Files (0)

Gamification (0)

Layout (0)

Messages (0)

Mobile Publisher (0)

Process Automation (0)

Records (0)

Sales (0)

Support (1)

Topics (0)

Other Components (0)

Get more on the AppExchange

Template Header Top

SEARCH

USER17526...

Template Header Bottom

WELCOME!

A place where you can easily find solutions and ask questions

MY FEED

ASK A QUESTION

Embedded Messaging

Messaging_Service_Agent

Enhanced Service URL

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

Site Endpoint

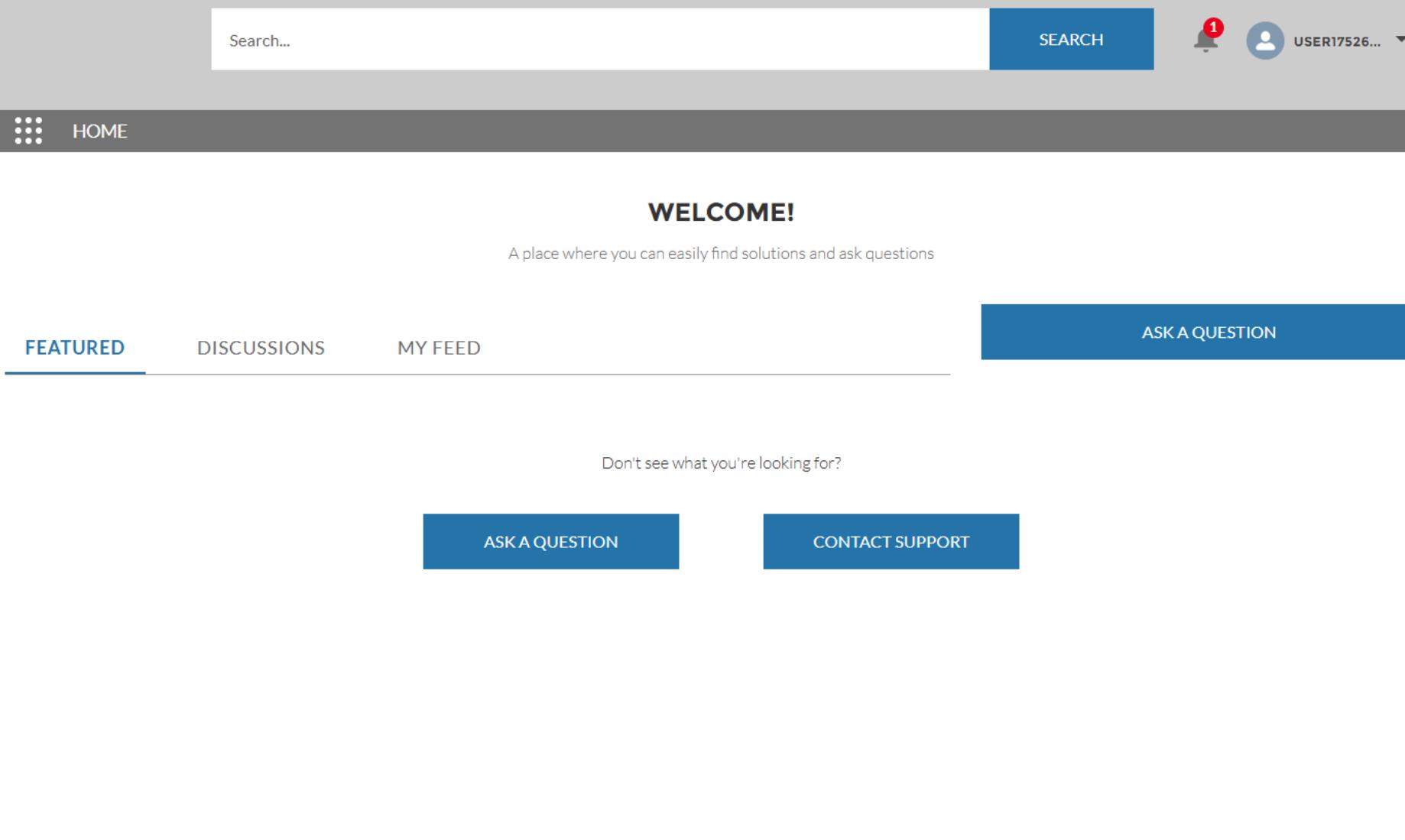
ESW_Messaging_Service_Agen_17526806...

Chat Button Visibility

Default Visibility

Add credential-based user verification

GO TO SITE > CHAT AT BOTTOM RIGHT



CHAT WITH AGENTFORCE AND SEE MAGIC

← → C ⌂ orgfarm-f8f9335c45-dev-ed.develop.my.site.com/ehr/s/ ⌂

Aloha Alohal Customize Concierge the fun way to learn... new new feed upda... smart/CaPAD: Servic... Salesforce - Unlimit... sandbox How to Set Up Git a... Logout All Bookmarks

Search... SEARCH

1 USER17526...

HOME

WELCOME!

A place where you can easily find solutions and ask questions

FEATURED DISCUSSIONS MY FEED ASK A QUESTION

Agentforce Service Agent 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.

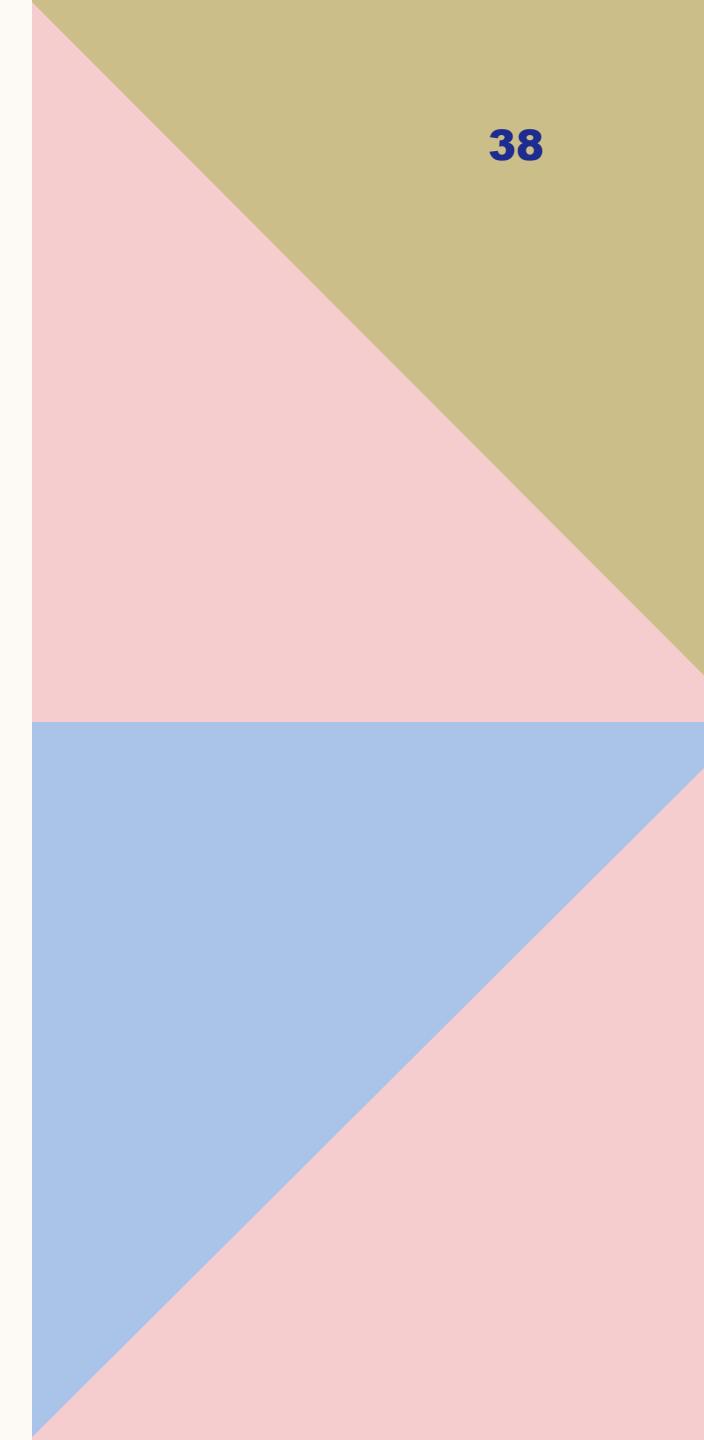
Don't see what you're looking for?

ASK A QUESTION CONTACT SUPPORT

Type your message...

By Smriti Sharan

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[sfdcAMPLIFIED](#)



66

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)

