

Agentforce Initial Setup: Best Practices and Key Considerations

Introduction

The purpose of this document is to provide best practices for getting Agentforce ready to use and to help SI's streamline the initial setup. The agency is responsible for enabling Agentforce in controlled orgs, while SIs may setup Agentforce in their sandboxes. **Even if Agentforce is enabled in an org you have access to, you must have explicit approval to utilize the Agentforce features.**

Prepare for Enablement (Org Readiness)

- **Confirm licenses are assigned to your org.**
 - Navigate to **Setup > Company Information** or check contract details. If licensing isn't available, Agentforce menus won't appear even if Einstein is enabled.
 - Net new sandboxes: **Productions licenses do not automatically carry over and must be manually matched to the sandbox after it is created.**
- **Confirm consumption allocation and reporting.**
 - Verifying consumption allocation prevents features being unavailable during setup due to "insufficient allocation."
 - Navigate to **Setup > Einstein > AI Consumption**
 - Request consumption reporting access visibility into credit usage, request access to consumption reports early—this often requires coordination with your Salesforce account team or a separate enablement step.
- **Confirm org security settings won't block Agentforce**
 - Verify API access is turned on in the org and note any API limits.
 - Make sure Shield/Encryption policies won't block data access needed by agents.
- **Validate that the org's data model is ready**
 - Check key objects exist.
 - Confirm required fields aren't hidden.
 - Confirm org-wide defaults and sharing rules won't block agent queries.
 - Ensure sample and test records exist for agent validation.

Data 360

1. In **Setup**, search for **Data Cloud Setup**.
2. Click on **Get Started**.
3. **Wait:** This process is automated but can take anywhere from **30 minutes to a few hours**.
4. Once finished, you will see a "Success" state and a link to the **Data Cloud Admin** app in your App Launcher.
5. **Data Cloud Admin/Architect** permission set must be assigned. Otherwise, the Data Cloud tab won't appear even after provisioning.

Note: "Data Cloud setup in progress" means Salesforce is still setting up the Data Cloud environment for this sandbox. Wait for it to finish before you continue with Agentforce or Data Cloud tasks. If it stays stuck, the sandbox may not have copied Data Cloud licenses correctly.

Agentforce

If you enable features out of order, menus may not appear or features may error. A typical sequence may include the following:

1. **Enable Einstein Generative AI** (Setup > Einstein > Einstein Setup)
2. **Verify the Trust Layer status.** After enabling Einstein, check that:
 - a. The Trust Layer is active
 - b. Model selection loads
 - c. Safety filters show as enabled
3. **Enable Agentforce** (Setup > Agentforce Studio > toggle on)
4. **Confirm Agentforce Metadata loaded correctly.** After enabling Agentforce:
 - a. Ensure Agentforce Setup pages load
 - b. Ensure the "Default Agent" can be toggled on/off
 - c. Ensure the Agent Studio menu appears in Setup
5. **Enable Data Cloud** if using Setup with Agentforce or Data Cloud-dependent features
6. **Enable specific agent types** (Service Agent requires Enhanced Chat setup; Employee Agent requires org authentication)

Permissions Check

Being a System Administrator alone will not suffice to develop and manage Agents and Data 360; users must also be assigned the appropriate Permission Set Groups for Agentforce and Data Cloud.

Feature	Required Permission Sets
Agentforce	Agentforce Console User, AI Accelerator, and Prompt Builder User.
Data Cloud	Data Cloud Admin or Data Cloud User.
Generative AI	Einstein GPT User.

Validate

To ensure everything is connected, follow these steps:

1. **App Launcher:** Confirm the **Agentforce** app is now visible.
2. **Data Cloud:** Open the Data Cloud app and verify you can see the **Data Streams** tab.
3. **Prompt Builder:** Navigate to **Setup > Prompt Builder** to ensure you can create templates (this is how you give "instructions" to your Agent).

Note: If you plan on using Data Cloud data to ground Agentforce responses, remember to navigate to **Data Cloud Setup > Workspaces**, and ensure the Agentforce user has access to the relevant Data Space.