

CHEATSHEET

Deploying Agentforce without setting strict Topics and Guardrails is the fastest way to get your Salesforce AI project pulled by compliance. Here is your governance playbook.

Agentforce for Salesforce Teams: Use Cases, Governance, and Guardrails

How to structure permissions, define clear topics, and enforce safety boundaries in your Salesforce org.

Every Agentforce agent is governed by three critical layers. If you don't structure these properly, your agent can access records it shouldn't.

- ✦ **Agent Topics:** The domains of work (e.g., Case Management) — the agent's job description.
- ✦ **Agent Actions:** The specific tools/operations (e.g., querying records, sending emails).
- ✦ **Guardrails:** Explicit, unbreakable rules that stop agents from acting outside their scope.

Start your deployment with high-volume, repetitive tasks where the cost of an error is low. Avoid complex financial transactions in your initial launch phase.

- ✦ Case Deflection: Deflecting routing queries via self-service portal tools.
- ✦ Knowledge Retrieval: Quick internal Q&A for sales and onboarding support.
- ✦ Lead Qualification: Filtering incoming leads before assigning to SDRs.
- ✦ Order Lookups: Checking delivery status in Commerce Cloud without manual search.

Prevent your autonomous AI agent from exposing draft data or bypassing internal checks. Always configure these guardrails before going live.

- ✦ **Strict FLS:** Ensure agents respect the running user's Field-Level Security.
- ✦ **Object Restrictions:** Isolate Case agents from accessing sensitive Opportunity records.
- ✦ **Manual Handoffs:** Always define a clear pathway to route complex queries to live agents.
- ✦ **Approval Controls:** Prevent agents from bypassing multi-step approval workflows.

THAT'S A WRAP

Build Secure Agentforce Workflows

Ready to scale secure, autonomous AI workflows inside your Salesforce org? Read our complete technical guide on Agentforce use cases, architecture, and safety guardrails.

- ✦ Visit salesforcelwc.com for the complete playbook.
- ✦ Learn to construct scalable orchestration patterns.
- ✦ Master Salesforce architecture, LWC, and secure AI integration.

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