

Required Licenses for Agentforce & Data Cloud

1.Ensure the target org has the following licenses enabled:

Salesforce Data Cloud

Einstein 1 / Agentforce

API Enabled (for Connected App & callouts)

2.How to check:

1. Go to **Setup → Company Information**
2. Verify:Data Cloud license count &Einstein / Agentforce entitlements
3. Go to **Setup → Users → User → Permission Set License Assignments**

📖 Help Doc:

Salesforce Data Cloud Licensing

https://help.salesforce.com/s/articleView?id=data.c360_a_dc_editions.htm&type=5

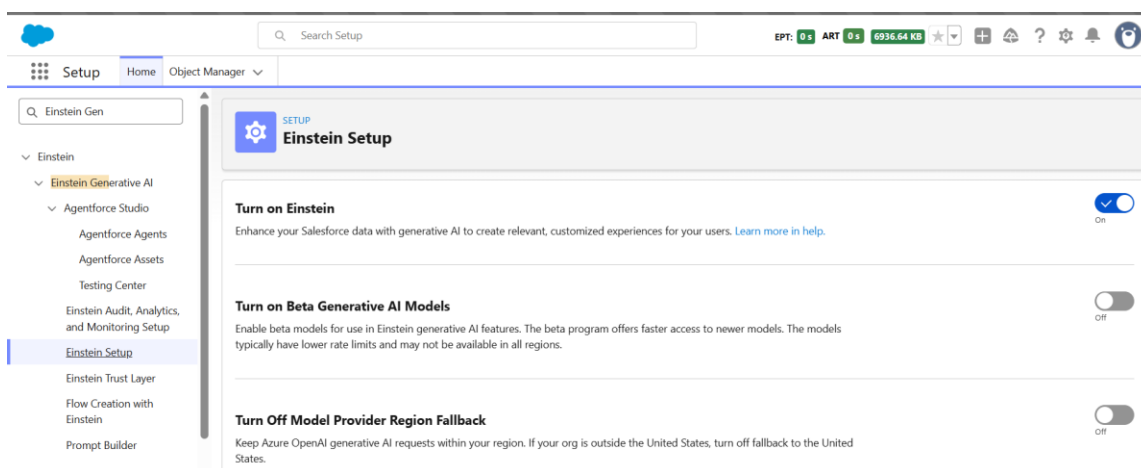
Einstein 1 Credits & Agentforce Docs

<https://help.salesforce.com/s/articleView?id=005197697&type=1>

1. Enable Einstein Features

Steps:

1. Log in to your Salesforce org where the package will be installed.
2. Click the ⚙ Gear icon (top-right corner) → Select Setup.
3. In the Quick Find search box, type “Einstein Gen”.
4. Click Einstein Setup under the Einstein section.
5. Turn ON Einstein setup by following the on-screen instructions.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar, and system status indicators (EPT: 0s, ART: 0s, 6936.64 KB). The left sidebar shows the Setup menu with 'Einstein Setup' selected. The main content area is titled 'Einstein Setup' and contains three toggle switches:

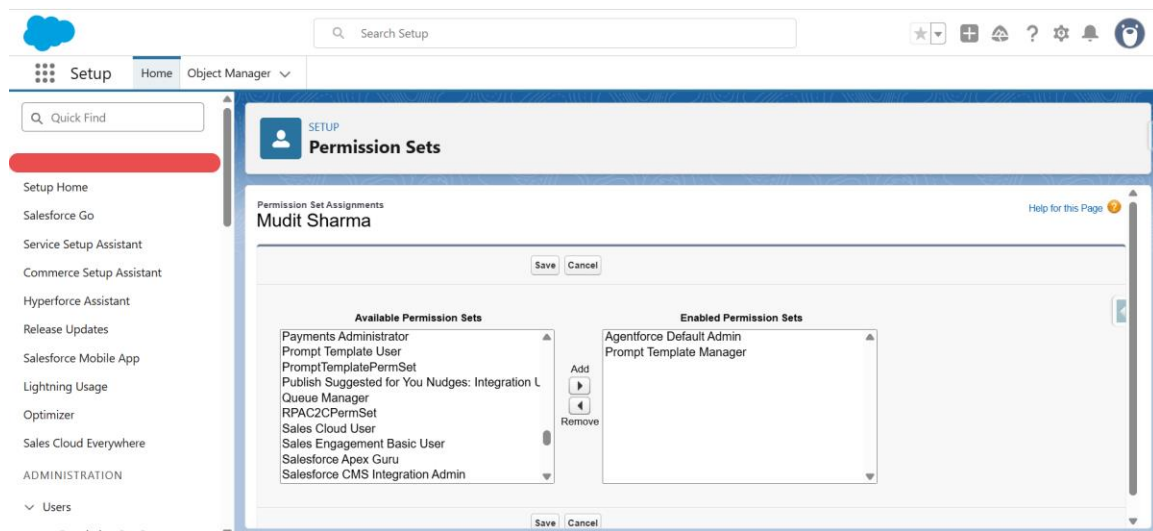
- Turn on Einstein**: A toggle switch is turned ON. Description: Enhance your Salesforce data with generative AI to create relevant, customized experiences for your users. [Learn more in help.](#)
- Turn on Beta Generative AI Models**: A toggle switch is turned OFF. Description: Enable beta models for use in Einstein generative AI features. The beta program offers faster access to newer models. The models typically have lower rate limits and may not be available in all regions.
- Turn Off Model Provider Region Fallback**: A toggle switch is turned OFF. Description: Keep Azure OpenAI generative AI requests within your region. If your org is outside the United States, turn off fallback to the United States.

2. Assign Required Permission Sets

After enabling Einstein, assign the following permission sets to the users who will use or configure the package.

Steps:

1. Go to Setup → In the Quick Find box, type Users → Click Users.
2. Open the user record (for example, the Admin user).
3. Scroll down to the Permission Set Assignments related list and click Edit Assignments.
4. Add the following permission sets:
 - Prompt Template Manager
 - Agentforce Default Admin
5. Click Save.



DATA CLOUD Setup

1.Enable Salesforce Data Cloud

Go to set up and search data cloud setup home and click Get started(takes some time).

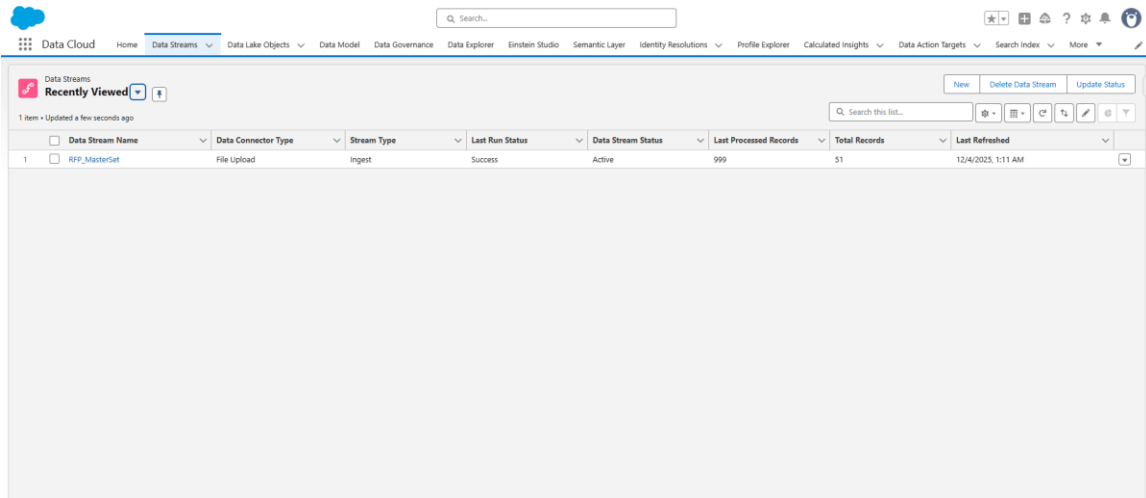
Help Doc :

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

Steps:

1. Go to APP launcher and search Data cloud
2. Confirm Data Cloud license is assigned to required users
3. Verify access to:

- Data Streams
- Data Model Objects (DMOs)
- Data Explorer



	Data Stream Name	Data Connector Type	Stream Type	Last Run Status	Data Stream Status	Last Processed Records	Total Records	Last Refreshed
1	RFP_MasterSet	File Upload	Ingest	Success	Active	999	51	12/4/2025, 1:11 AM

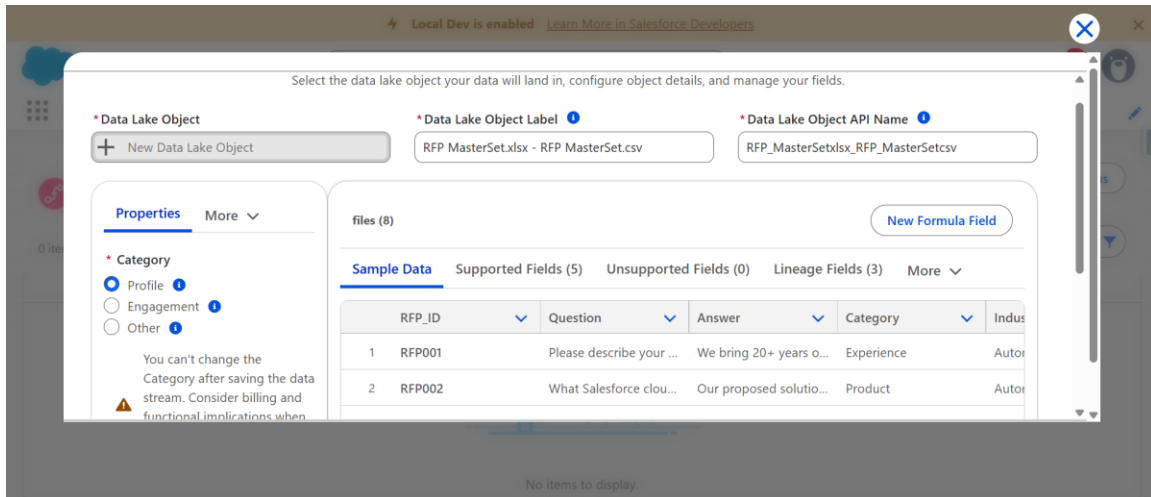
We are setting up **RFP Master Data** to store all previously answered RFP content. This dataset will act as the **knowledge base** for semantic and keyword search in **Data Cloud Hybrid Search**.

The quality of this dataset directly impacts:

- Search accuracy
- Vector similarity results
- Relevance of AI-generated answers

2. Upload Source File via Data Stream (One way of doing it)

- 1.Go to APP launcher and search Data cloud → Click Data cloud → select Data Streams tab
- 2.Click New→ Select file Upload option and upload the file you have (CSV / Parquet / etc.)
- 3.Map file fields to Data Model Objects (DMOs)
- 4.Activate the Data Stream
- 5.Confirm data ingestion status = Completed



(OR)Upload Source File via API (Option 2 – Postman using Connected App)

Generate OAuth Access Token

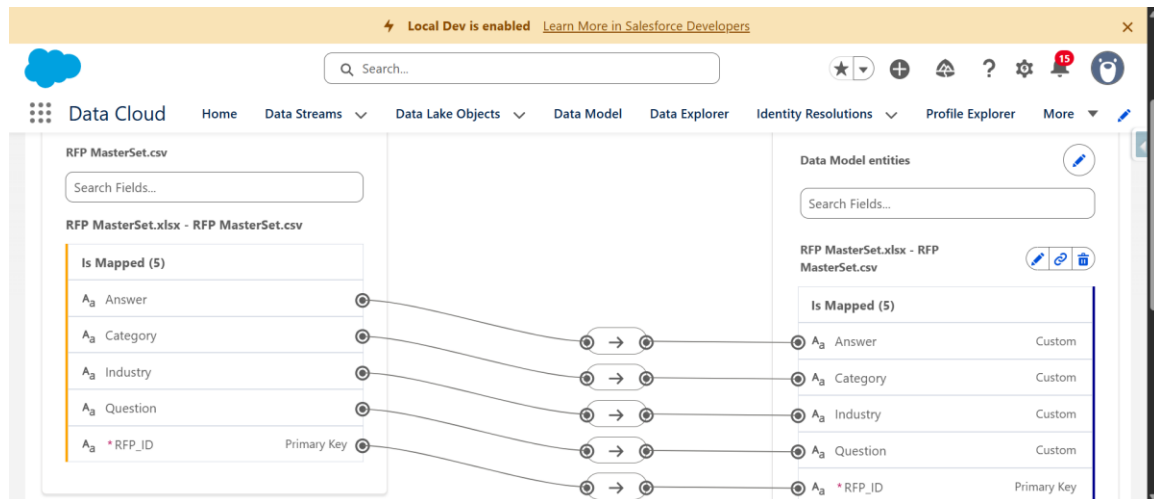
1. Open Postman
2. Create a new request → Method: **POST**
3. Token Endpoint:
https://login.salesforce.com/services/oauth2/token
(Use test.salesforce.com for sandbox)
4. Select Body → x-www-form-urlencoded
5. Provide parameters:
 - **grant_type = authorization_code (or refresh_token)**
 - **client_id = Connected App Consumer Key**
 - **client_secret = Connected App Consumer Secret**
 - **redirect_uri = Auth Provider Callback URL**
 - **code = Authorization Code**
6. Click Send
7. Copy the access_token

Upload Data File to Data Cloud

1. Create a new POST request in Postman
2. Endpoint:
/services/data/vXX.X/connect/dataCloud/ingest
3. Headers:
 - **Authorization: Bearer <Access_Token>**
 - **Content-Type: multipart/form-data**
4. Body:
 - file = CSV / Parquet file
 - dataStreamName = **RFP_Master_Data_Stream**
5. Click Send

3. Configure Data Mapping

1. Open the Data Stream and Click **Start** under Data Mapping
2. Under **Data Model Entities** → Select **Custom Data Model** → Click **+** to auto-create Custom DMO and Verify mapping.
3. Save



4 Create Search Index <Mandatory step>

Creating a Search Index is a mandatory step to enable semantic (vector) search, keyword search, and hybrid search on Data Cloud data. Without a Search Index, data stored in DMOs cannot be queried using Hybrid Search or used by Copilot / AI use cases.

The Search Index:

- Converts text fields into **vector embeddings**
- Enables **semantic similarity matching**
- Combines **keyword + vector ranking (Hybrid Search)**
- Powers **AI-driven search, Copilot responses, and recommendations**

In this use case, the Search Index allows matching **new RFP questions** against **previously answered RFPs**.

Help Doc:

https://help.salesforce.com/s/articleView?id=data.c360_a_search_index_easy_setup_search_index.htm&type=5

Steps

1. Go to Search Index
2. Click New and Choose **Advanced Setup**

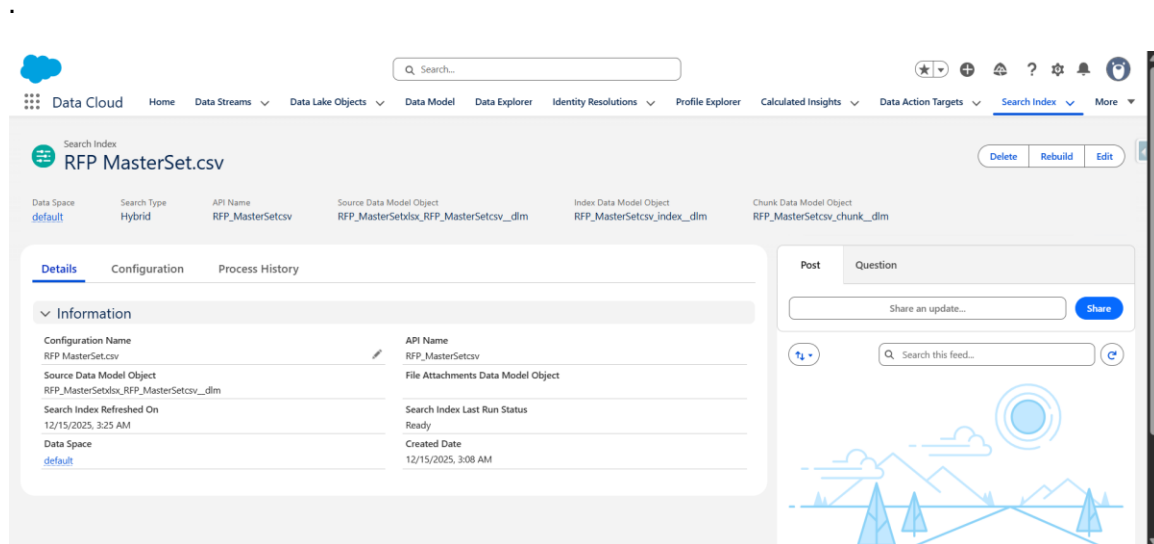
3. Select **Hybrid Search** and Select the **Custom DMO**

4. Configure:

 Chunk fields (e.g., RFP Question)

 Filter / ranking fields if needed

5. Save



Testing the setup:

1. Go to Query Editor - Paste the sample query below

Note: Query might change on how the data stream created

```
SELECT c.Chunk__c, c.SourceRecordId__c, h.hybrid_score__c, h.keyword_score__c,
       h.vector_score__c FROM hybrid_search(table(RFP_Custom_DMO_dlm), 'Describe the RFP
       approval process') h JOIN RFP_Custom_DMO_dlm c ON h.record_id = c.Id LIMIT 5
```

2. Click Run

