

Flow Agentforce Chat Set Up and User Guide

Set Up and User Guide



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This guide provides the configuration steps and architectural overview for the three AI implementation options included in this package. These tools allow you to embed Agentforce capabilities directly into your Salesforce Screen Flows.

 Architecture Comparison

Feature	Agentforce Agent Chat	Models API Chat	Flow Integration
Backend	Native Apex Controller	Native Apex Controller	Native Flow Engine
Authentication	Current User Session	Built-in	Current User Session
Primary Use Case	Persona-based Agents	Direct LLM Interaction	Structured Data Collection

1. Agentforce Agent Chat (flowAgentforceAgentChat)

The most common use case, allowing a full-featured Agentforce agent to be embedded in a Flow screen with real-time streaming and session management.

Prerequisites

- 1. **Permission Sets:** Assign the **Flow Agentforce Chat Access** and **Einstein Agent User** permission sets to all users.
- 2. **Agent Setup:** Ensure your Agentforce Agent is created and **Active** in *Setup > Agents*.

Component Properties

Property	Type	Requirement	Description
agentId	String	Required	The API Name (e.g., Service_Agent). Do NOT use the

			18-character ID.
defaultMessage	String	Optional	Placeholder text or the first message sent in auto-start mode.
autoStart	Boolean	Optional	If true, sends the defaultMessage after the delay period.
autoStartDelayMs	Integer	Optional	Delay (ms) before auto-start. Default: 2000.

Output Variables

- **conversationHistory**: The full transcript formatted with "Agent:" and "You:" prefixes.
- **lastAgentMessage**: The most recent response from the agent (useful for Flow decision logic).

2. Models API Chat (**flowAgentforceChat**)

Direct interaction with Large Language Models (LLMs) without a specific Agent persona. Best for general Q&A or summarization tasks.

Features & Configuration

- **Model Selection**: Specify the modelName from Einstein Studio (e.g., sfdc_ai__DefaultGPT4Omni).
- **Usage Tracking**: The component outputs consumedRequests, allowing you to monitor Einstein API credit consumption.
- **Typing Simulation**: Responses are displayed word-by-word for a natural UI feel.

3. Flow Integration System (**flowRenderer**)

Renders a Salesforce Screen Flow directly inside an Agentforce chat session.

Core Components

1. **flowRenderer (LWC)**: The UI component that visually displays the Flow within the chat.
2. **FlowAction (Apex)**: An invocable method that prepares Flow metadata for the renderer.
3. **Launch_Screen_Flow (GenAI Function)**: An agent action that connects natural

language triggers to Flow execution.

Common Troubleshooting

Authentication (401 Unauthorized)

- **Solution:** Verify the user has both the **Einstein Agent User** and **Flow Agentforce Chat Access** permission sets. Ensure the Agent is marked **Active**.

Agent Not Found (404 Not Found)

- **Solution:** You are likely using the Record ID. You **must** use the **API Name** (PascalCase or snake_case) found in the Agent's Setup page.

Best Practices

- **Audit Trails:** Map the conversationHistory output to a Long Text Area field on your records to save transcripts.
- **Interactive Branding:** Use the defaultMessage and autoStart features to provide a warm "Agent is here to help" greeting.
- **Error Handling:** Use Flow Decision elements to check if lastAgentMessage contains keywords like "error" or "escalate" to route the user to a human representative.

Version History (v2.2+)

-  **Native Apex:** Removed requirements for Connected Apps and Named Credentials.
-  **Enhanced UI:** Added "Agent is joining" and "Thinking" indicators.
-  **Markdown Support:** Full support for bold, italics, code blocks, and links in chat.

Resources

1. [Check out Labs on Github](#)
2. [Check out all Labs solutions on AppExchange](#)
3. [Trailblazer Community](#)