



The Ultimate Guide to Supercharging Agentforce with Heroku

Executive summary

The business landscape is undergoing a fundamental transformation. We are moving beyond an era of passive software governed by rigid, pre-written rules to a new paradigm of proactive, autonomous AI agents. These agents are not just tools; they are a digital workforce capable of reasoning, planning, and executing complex tasks. Salesforce Agentforce is the definitive agentic layer of the Salesforce platform, engineered to build and deploy this new class of AI agent, revolutionizing organizations and driving extraordinary customer success.

While Agentforce is a powerful platform, its transformative potential is unlocked when supercharged by Heroku, Salesforce's AI Platform as a Service (AI PaaS). This strategic integration elevates Agentforce from a powerful set of tools into a limitless enterprise platform. Heroku provides the elastic compute, flexibility, and seamless data integration capabilities necessary for agents to move beyond standard functions. It enables the creation of powerful custom actions using a variety of programming languages, allowing agents to access and process external, complex, and diverse data, while performing computationally intensive tasks.

This combined power delivers secure, scalable, and highly personalized AI-driven solutions that enhance customer experiences and streamline complex business processes. This guide will explore how the capabilities of Agentforce can be dramatically expanded with Heroku, providing a comprehensive roadmap for building the next generation of intelligent automation.

Who is this guide for?

This guide is essential for the key stakeholders responsible for driving AI transformation:

Architects and technical practitioners:

Individuals responsible for designing, implementing, and optimizing AI agent solutions, who require a deep understanding of Agentforce's core capabilities and its extensibility through Heroku.

Developers:

Professionals aiming to build custom AI agent actions, integrate diverse data sources, and leverage advanced libraries using popular programming languages to push the boundaries of what's possible.

Technology leaders and AI strategy teams:

Professionals defining the AI vision, governance, and use cases within their organizations to enhance customer success, streamline operations, and drive revenue growth across sales, service, and marketing.

What is this guide for?

By the end of this guide, the above audiences will gain a deeper understanding of how to:



Extend Agentforce capabilities:

Learn how you can move beyond standard functionalities by enabling custom, computationally intensive, and data-rich actions that integrate with external APIs and specialized libraries. Discover how you can facilitate multi-step reasoning, dynamic decision-making, and the automation of intricate business processes that span multiple systems.



Unify and access disparate data:

Find new ways for AI agents to ingest, understand, and act upon data regardless of its origin, format, or location, from modern cloud services to legacy archives. Learn how agents can proactively engage with and increase efficiency in other systems, rather than just sending notifications that require human interaction.



Enhance near-real-time capabilities:

See how to gain near-real-time service capabilities, providing immediate agent responses to new data.



Achieve enterprise-grade scalability and performance:

Understand how to handle high-volume interactions and computationally demanding tasks without being constrained by platform limitations.

The AI imperative: understanding Agentforce

Agentforce represents a fundamental shift in how businesses interact with technology. It is not simply an evolution of chatbots or workflow automation; it is a new paradigm for human-computer collaboration. If traditional software is a set of rigid, pre-programmed instructions, an Agentforce agent is an autonomous digital employee that can reason, plan, and act to achieve a goal.

At its core, an agent is a type of software that leverages generative AI, particularly Large Language Models (LLMs), to make intelligent decisions about what to do next and how to execute them. This makes Agentforce agents remarkably dynamic and adaptive to various situations, environments, and information. As a core component of the #1 AI CRM, Agentforce is built on the trusted Salesforce Platform, inheriting its enterprise-grade security and governance.



Key capabilities of Agentforce agents include their ability to:

- ✓ **Understand user intent:** Agents can comprehend a user's question or "utterance" in natural language, discerning the underlying goal.
- ✓ **Autonomously reason and plan:** They can determine the necessary sequence of actions required to fulfill a user's request, even if it involves multiple steps.
- ✓ **Identify and utilize data:** Agents can pinpoint and access the precise data needed for their tasks, whether it resides in Salesforce, an external database, or an unstructured document.
- ✓ **Take action:** Agents can execute tasks such as updating records, calling APIs, or sending notifications, either autonomously or with human supervision.

Common business challenges addressed by Agentforce:

Organizations today face a common set of challenges: operational bottlenecks caused by manual processes, critical data locked away in silos, and an ever-increasing demand for dynamic, personalized customer interactions at scale. Agentforce directly addresses these pain points.

The problem:

Businesses are constrained by operational inefficiencies and an inability to scale personalized customer engagement. Manual tasks consume valuable employee time, rigid rule-based systems fail to adapt to changing customer needs, and fragmented data prevents a holistic view of the customer.

The solution:

Agentforce provides a digital workforce to automate and augment human capabilities.

Increasing efficiency

By automating tasks that traditionally require human intervention—from triaging support tickets to processing loan applications—Agentforce frees up employees to focus on high-value, strategic work.

Adapting to dynamic environments

Unlike rigid, rules-based systems, AI agents are built to handle evolving contexts, making them more robust and effective in real-world scenarios.

Navigating complex decision-making

When multiple paths are possible, agents can reason through the options based on available data and choose the optimal course of action.

Delivering hyper-personalized experiences

Agentforce provides a 24/7 digital presence, ensuring customers receive support whenever needed with highly personalized interactions.



“ We’ve built our platform to move fast, and Agentforce fits right into that mindset. It’s not just answering questions—it’s actually taking action, using near-real-time data from Heroku and Salesforce to help us support customers more intelligently.

Keegan Bakker, Founder & CEO, Audata

A prime example is **Audata**, a SaaS platform for the media industry. As it expanded globally, it faced the challenge of providing 24/7 customer support across multiple time zones without a massive increase in headcount. Agentforce provided the solution: an AI agent that could handle inquiries around the clock, scaling their service capabilities efficiently and cost-effectively.

Key use cases for adding additional functionality to Agentforce:

Agentforce offers a wide array of built-in capabilities, but its true power is realized through its extensibility. The platform is designed to be enhanced with specialized functionality to solve problems that are unique to each business, giving companies the ability to adapt the technology to their specific use case. These foundational use cases demonstrate the value Agentforce delivers out of the box, setting the stage for the more advanced capabilities that can be uniquely unlocked by Heroku, making it more appealing to use than external services.

The unique value of combining Agentforce and Heroku

- ✓ **Accelerates solutions** by reasoning against data, not just retrieving records.
- ✓ **Proactively engages with and increases efficiency** in other systems by enabling agents, as opposed to simply sending notifications.
- ✓ **Facilitates near-real-time capabilities** as an integrated part of the Salesforce trust layer, providing immediate agent responses to new data.

Agentforce

 **HEROKU**
from Salesforce



Heroku: the Salesforce AI PaaS



Agentforce provides a powerful foundation for custom solutions. Complex AI challenges—like integrating with siloed data or running intensive custom code—demand a platform with scalable computational power and tools designed for cloud native development that natively integrate with Salesforce. That platform is Heroku, Salesforce’s AI PaaS.



Heroku is Salesforce’s developer-first AI Platform as a Service (PaaS) designed for building, deploying, managing, and scaling modern applications with unparalleled ease and speed. It acts as a strategic bridge, connecting the trusted Salesforce ecosystem with the vast, innovative world of open-source and pro-code development. Heroku is the strategic asset that empowers these developers to bring their skills and tools to the Salesforce ecosystem, making it the indispensable engine for the most sophisticated AI solutions.

Heroku's key attributes include:

Polyglot platform



Heroku provides native support for a wide array of the most popular programming languages, including Python, .NET, Java, Node.js, Go, PHP, and Ruby. This gives development teams the freedom to use the best language for the job.

Integrated data services



The platform includes reliable, fully managed data services like Heroku Postgres and Heroku Key-Value Store, which simplify application data persistence and management.

Fully managed infrastructure



Heroku takes on the complexity of infrastructure management. Applications run in lightweight, isolated containers called “dynos,” which are automatically managed by the platform. This frees developers to focus on more valuable tasks such as building valuable application logic.

Build in any language



Buildpacks extend Heroku to support your preferred languages or customizations, or to make particular binary packages available to the runtime. Heroku offers official classic buildpacks for Heroku Cedar and Heroku Cloud Native Buildpacks for Fir, but if you're using a language or framework not yet supported on Heroku, you can create a custom buildpack or choose from over 7,800 third-party buildpacks in the Elements Marketplace.

Native AI capabilities



Heroku is more than just a compute platform; it is a purpose-built environment for AI development. Features like Heroku Managed Inference and Agents enable developers to easily integrate powerful foundation models into their applications and build agents that can execute custom code and interact with external tools.

Model Context Protocol (MCP) servers



This allows Agentforce to connect with custom actions and tools hosted on Heroku. This integration enables Agentforce to call custom logic built in any language, connect to various data sources and external tools, and extend its capabilities.

Heroku enables you to leverage Agentforce's full potential for enterprise-grade solutions. And it's the same platform that powers numerous internal Salesforce services, demonstrating its central importance to Salesforce's AI and integration strategy. As a part of the Salesforce trusted environment, Heroku enables developers of all backgrounds to build services that plug seamlessly into the Salesforce experience, making complex AI solutions accessible and scalable.

Supercharging Agentforce with Heroku

The five pillars of a supercharged agent

Building an effective and robust agent requires five key components: Role, Data, Actions, Guardrails, and Channels. Heroku and Agentforce work together to solve complex business challenges, as shown in the image below, by providing the robust framework and tools to implement each of these components. This synergy creates a transformative enterprise solution that goes beyond basic automation.

Role

Agent topics & instructions



 Extend your agents with Heroku Applink

Data

What knowledge can they access?



 Complement Data Cloud with Heroku Data Services

Actions

What capabilities do they have?



 Custom agent actions in any programming language

Trust

What shouldn't they do?



 Enforce existing guardrails with Heroku Applink

Channels

Where do they work?



 Custom user-facing Agent experience

Powerful industry applications and business value

This powerful combination enables AI agents to tackle mission-critical, industry-specific challenges. Across retail, financial services, healthcare, and more, Heroku supercharges Agentforce to handle complex tasks like near-real-time fraud detection, dynamic pricing, and automated claims processing. This delivers measurable business value and unparalleled customer experiences.



Retail

Flash sale activation

Live promo validation

Personalized in-store experiences



Technology & security

Advanced threat detection

Incident response orchestration

Compliance audit prep



Financial services

Loan risk scoring & eligibility

Near-real-time credit assessment

Fraud detection alerts



Healthcare

Near-real-time clinical trial eligibility

Remote patient monitoring

Automated claims processing



Travel & hospitality

Integrated group bookings

Dynamic pricing optimization

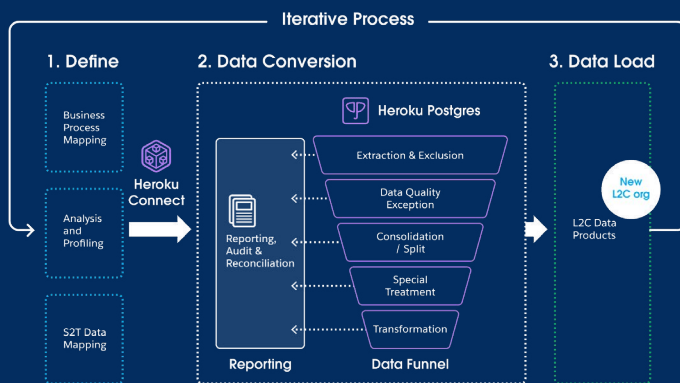
24/7 concierge-as-a-service

Unlocking and unifying customer data:

The challenge: An AI agent's intelligence is directly proportional to the quality and completeness of the data it can access. For most enterprises, this is a significant hurdle. Customer data is often fragmented across legacy systems, siloed in different cloud platforms like Azure or AWS, and locked away in unstructured formats, rendering it invisible and inaccessible to AI agents operating solely within the CRM.

The solution: Heroku acts as the central nervous system for data integration, creating a unified, near-real-time, and trusted data layer that Agentforce can draw upon for comprehensive, contextually rich responses.

Seamless Salesforce integration with Heroku Connect: As the gold standard for Salesforce data integration, Heroku Connect facilitates robust, bi-directional data synchronization between Salesforce objects and a Heroku Postgres database. This creates a seamless flow of information.



The Salesforce Data Migration Team uses Heroku to achieve **99.8%** data accuracy during mergers and acquisitions, demonstrating how this integration ensures data integrity across complex systems.

Before Heroku, the team would spend upwards of three months' worth of project hours setting up a single application processing system, which included creating the new solution and verifying the data. After Heroku, everything improved dramatically. The first obvious benefit was in no longer having to create a new, bespoke solution for each acquisition, instead letting Heroku establish a framework that could be reused and easily modified to work with new project requirements. Another key benefit was with data output, which, after a little tuning, was nearly 100% accurate, each and every time.



“ Our very first migration with the toolset, we had zero fallouts, and we were within 99.8% financial accuracy. When we walked away, everybody on the program was ecstatic with the result. There was no extended hyper care. In fact, I was so skeptical, I made Vishwa prove it to me several times that we had no fallouts and that we were that accurate.

Robert Boles, Salesforce Senior Solutions Architect

Multi-cloud data unification



Heroku can connect to virtually any data source, regardless of its location. For companies with data spread across multiple clouds, Heroku applications can act as intelligent aggregators, pulling data from various sources and presenting a unified view to Agentforce.

Powering Data Cloud



Heroku is a critical component in the broader Data Cloud ecosystem. It can ingest and process external data before feeding it into Data Cloud, which in turn powers essential Agentforce features like Retrieval Augmented Generation (RAG), agent analytics, and the ability to ground responses in trusted, harmonized data.

Enabling custom actions and advanced AI capabilities

The challenge:

Standard Agentforce actions are powerful for tasks within the Salesforce environment. However, truly complex business logic—requiring specialized algorithms, external API orchestrations, or access to extensive open-source libraries—demands greater flexibility.

The solution: Heroku empowers developers to build sophisticated custom actions in any programming language, leveraging a limitless ecosystem of libraries and tools. These custom applications are then exposed as simple, invocable actions within Agentforce via Heroku AppLink, the seamless bridge between the two platforms. More about Heroku AppLink will be discussed later in this guide.

This approach transforms Agentforce into a platform with boundless capabilities. For example, consider Audata. Using Heroku and Agentforce, it built an AI-powered agent named Aura that can triage support cases, answer routine questions, and summarize context for human agents by accessing near-real-time data from both Heroku Postgres and Salesforce Service Cloud. When a new feature request comes in via Agentforce, the system creates corresponding entries in both Salesforce and a lightweight, Heroku-hosted microsite, syncing it instantly across support workflows and a live public site for customers to vote on. This integration enables its agents to take real action, utilizing data from both platforms to support customers more intelligently.

Performing computationally intensive tasks (offloading compute)

The challenge: Long-running or computationally intensive tasks, such as complex financial modeling, large-scale data analysis, or dynamic document generation require massive amounts of resources beyond Salesforce governor limits.

The solution: Heroku provides a single-tenant, elastic compute environment that acts as a “governor limit escape hatch.” By offloading these heavy tasks to Heroku, Agentforce can perform operations of any complexity or duration.



Complex financial modeling: The financial services industry provides a perfect example. **Hero Fincorp**, a leading loan company, used Agentforce and Heroku to slash their loan approval time from two days to under 30 minutes. Complex multi-tier interest rate calculations, credit assessments, and dynamic PDF agreement generation are all offloaded to a Heroku service, which can perform these intensive tasks in near-real time without hitting any platform limits.

Facilitating near-real-time contextualization

The challenge:

An AI agent's response is only as good as its data is fresh. In a fast-moving business environment, relying on data from last night's batch process can lead to stale, irrelevant, and even incorrect answers, eroding user trust.

The solution: Heroku's architecture is designed for near-real-time data processing and event-driven interactions, ensuring Agentforce agents operate with up-to-the-second information.

- **Near-real-time sync:** Near-real-time sync: Heroku Connect provides a persistent, bi-directional synchronization between Salesforce and Heroku Postgres, ensuring that data changes in either system are reflected in the other.
- **Event-driven insights:** Heroku Eventing allows applications to react immediately to business events. For example, a change in inventory in an ERP system can trigger an event that a Heroku app consumes, instantly updating the data available to a sales agent, preventing it from offering an out-of-stock product.



Audata's AI agent, Aura, provides around-the-clock support by triaging cases and answering routine questions using live data pulled simultaneously from Heroku Postgres, Salesforce Service Cloud, and Audata's internal knowledge base.

Enabling complex integrations and data transformations

The challenge:

The modern enterprise is a complex web of applications. A single business process, like fulfilling an order, may require interaction with an ERP, a warehouse management system, a shipping provider's API, and a payment gateway. Agentforce needs to orchestrate these disparate systems, but the data often requires transformation and combination before it can be utilized.

The solution: Heroku, often working in concert with MuleSoft, serves as the intelligent integration and transformation layer for the enterprise. While MuleSoft provides robust, enterprise-wide API management and connectivity to systems of record, Heroku provides the custom logic needed for last-mile data preparation.

- **Connecting the enterprise:** MuleSoft is used to connect to the dozens of disparate systems of record, exposing their data through a managed layer of APIs.
- **Intelligent aggregation on Heroku:** A Heroku application can then act as an intelligent API gateway. It calls multiple MuleSoft APIs, aggregates the responses, performs any necessary transformations or calculations, and presents a single, simplified API endpoint to Agentforce.
- **Seamless invocation:** Agentforce consumes this simplified endpoint via Heroku AppLink, allowing a single agent action to trigger a complex, multi-system workflow.



The **World Economic Forum** showcases this use case at scale. It successfully integrated 64 disparate systems using the Salesforce Platform, including MuleSoft for seamless data connectivity and Heroku to power their online community platforms and mobile app APIs. This created a unified data environment for their global initiatives, demonstrating a powerful, two-layer integration strategy that can address any level of complexity.

Enhancing developer flexibility and productivity

The challenge:

Restricting development to a single proprietary language can limit access to talent, slow down innovation, and prevent teams from using the best tool for a specific problem. Modern development practices also demand streamlined, automated workflows for testing and deployment.

The solution: Heroku is celebrated for its developer-first experience, which significantly boosts flexibility, productivity, and morale for teams building Agentforce solutions.

- **Polyglot freedom:** Developers are not confined to Apex. They can build custom agent actions in their preferred language, whether it's Python for a data science task, Java for enterprise-grade backend logic, or Node.js for a fast and lightweight API. This broadens the available talent pool and allows teams to leverage their existing skills and codebases.
- **Streamlined DevOps:** Heroku's integrated CI/CD (Continuous Integration/Continuous Deployment) features, such as Heroku Pipelines and Review Apps, automate the testing and deployment process. Developers can push new code and have it automatically built, tested, and deployed to a staging environment for review, drastically reducing deployment friction and accelerating the delivery of new features.
- **No infrastructure overhead:** Heroku manages the underlying infrastructure, from servers and networking to security and patching. This allows development teams to focus purely on writing application code that delivers business value, rather than managing infrastructure.

The impact on productivity is tangible. **Stratis Global**, a cloud development consultancy, reduced its build time by over 35% compared to its previous Azure-based workflows by adopting a Heroku-first strategy. For one client, it delivered a full Order Management System (OMS) rebuild for nearly 80% less than a competing quote by reusing components and leveraging Heroku's streamlined deployments. Its demo preparation time was cut from weeks to mere hours.

To hear more about what developers can accomplish with Agentforce, listen to the Code[ish] podcast episode [Agentforce for Developers](#).



“ Heroku lets us move fast without giving up the tools or architecture we care about. We were able to build five full apps in four months and still do it our way—with.NET, event-driven design, and real-time Salesforce data.

Jason Storey, Founder and CTO, Stratis Global

Operational efficiencies and revenue growth

The challenge: Ultimately, any technology investment must translate into measurable business value. The goal is not just to build sophisticated AI, but to use that AI to drive down costs, increase operational efficiency, and accelerate revenue growth.

The solution: The combined power of Agentforce and Heroku delivers tangible, quantifiable results across the business, turning AI from a cost center into a powerful engine for growth.



Reduced support costs and increased scalability

- **Audata** provides a compelling case study. By deploying their AI agent, Aura, on Agentforce with data powered by Heroku, they anticipate the agent will resolve **60% of incoming support requests**. This allows it to scale its operations internationally and provide 24/7 coverage with **zero increase in headcount** for its support team.

Audata anticipates its Agentforce agent will resolve 60% of incoming support requests, reducing manual load and improving response consistency.



Accelerated development and cost savings

- **Stratis Global's** switch to a Heroku-first strategy resulted in a build time reduction of over **35%** compared to previous workflows. This productivity gain allowed it to deliver a full OMS rebuild for a client for nearly **80% less** than a competitor's quote.¹
- **Softtrends'** customers achieved approximately **20% cleaner data** and **38% faster data workflows** by using Heroku to synchronize data across Marketing Cloud and Data Cloud, compared to legacy ETL tools.



Direct revenue growth

- **Audata** projects at least **50%** revenue growth in the coming year thanks to the operational efficiencies gained from their Agentforce and Heroku implementation.
- **Hero Fincorp's** dramatic reduction in loan approval time from **2 days to 30 minutes** directly accelerates revenue capture and improves dealer loyalty in a highly competitive market.
- The **World Economic Forum** used Agentforce to successfully resolve **75%** of Davos 2025 attendee queries without requiring human intervention, enabling leaders to focus on impact.

These results demonstrate that supercharging Agentforce with Heroku is not just a technical upgrade; it is a strategic business decision that yields a powerful return on investment. In fact, a [Forrester Total Economic Impact™ Study Commissioned By Salesforce, March 2025](#), found that Heroku customers can realize a 286% ROI over three years.

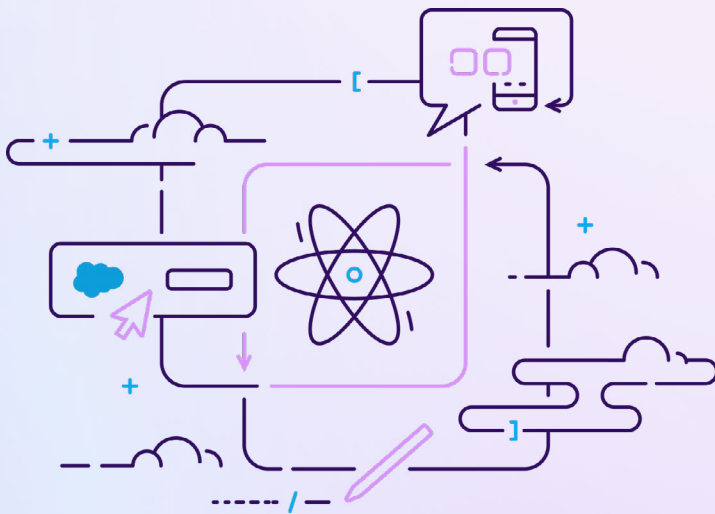
The technical bridge: the power of Heroku AppLink and MCP

To enable the powerful synergies described in the previous section, a secure and standardized technical bridge is required to connect Agentforce with custom applications running on Heroku. This bridge is built on two key technologies: Heroku AppLink and the Model Context Protocol (MCP).



Heroku AppLink: the seamless bridge

Heroku AppLink is a powerful integration solution designed to securely expose Heroku applications as native, invocable actions within the Salesforce ecosystem, eliminating the need for complex, custom-built integration plumbing. It acts as a universal adapter, allowing any “appliance” built on Heroku to plug directly and securely into Salesforce.



Key components and benefits of Heroku AppLink include:

- ✓ **Seamless connectivity:** Heroku AppLink automatically links Heroku apps with Salesforce and Data Cloud, creating a unified environment for near-real-time interactions.
- ✓ **Managed security:** Heroku AppLink is the cornerstone of the security model. It enforces verification of Salesforce user's permissions on any data access requests made from the Heroku app, ensuring all interactions operate within the Salesforce Trust Layer.
- ✓ **Flow & Apex Invocation:** Services hosted on Heroku can be called directly from Salesforce Flows and Apex code, providing flexible integration options for both low-code and pro-code developers.
- ✓ **OpenAPI-based discovery:** A Heroku application simply needs to provide a standard OpenAPI specification file that describes its API endpoints. AppLink uses this file to automatically generate the corresponding invocable actions within Salesforce, a process that takes minutes instead of weeks of manual coding.



“ Heroku Eventing is how we can do an event-driven architecture. We used to depend on external systems to do that eventing for us, but now with the AppLink feature we can natively do eventing through Heroku and all the user context as well as the security is intact. So, that was the winning factor and we got really good success out of it.

Rushikesh Choudhury, Senior Manager, Workday

Workday leverages **AppLink** to implement a native event-driven architecture through Heroku, moving away from reliance on external systems for that functionality. This capability is critical for optimizing operations such as their CPQ (Configure, Price, Quote) engine and case management systems, allowing them to offload asynchronous or less business-critical synchronous processes from Salesforce to Heroku. A significant benefit of using AppLink is that it keeps the user context and security intact throughout these complex, distributed processes, which was considered a winning factor in its adoption.



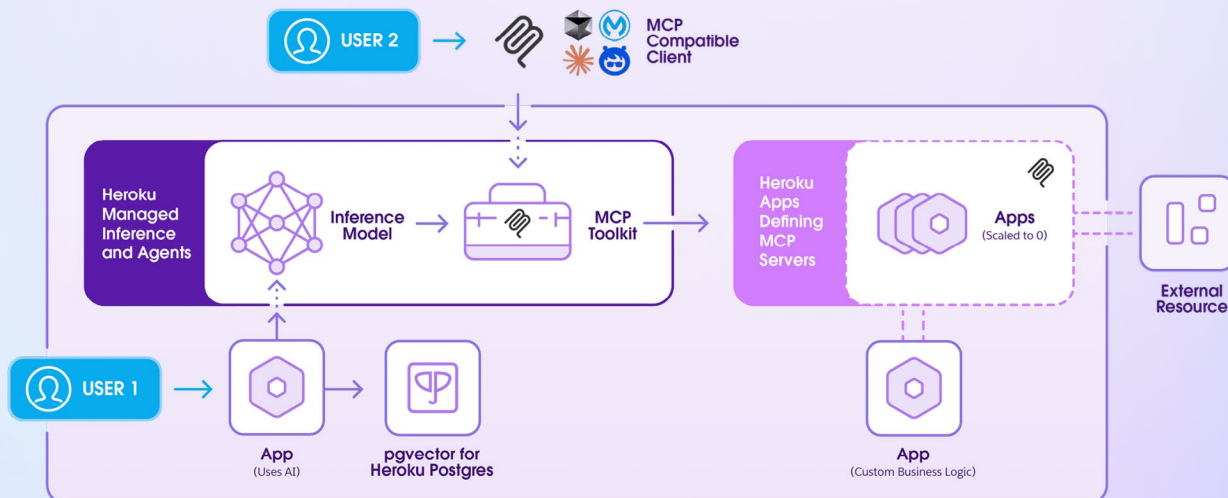
Introducing Heroku's MCP server

Model Context Protocol (MCP) is an open standard that defines a common language for how AI agents (like those in Agentforce) can discover, understand, and use external tools and APIs.

A **Heroku MCP server** is an application running on Heroku that implements this protocol. It effectively serves as a “toolbelt” for an AI agent. The agent can interact with the MCP server to ask, “What tools do you have available?”

The server then responds with a standardized description of its capabilities, such as “calculate shipping cost” or “query inventory database,” including the specific inputs each tool requires. The agent can then decide to execute one of these tools to fulfill a user's request.

This architecture allows developers to define an agent's capabilities as code, manage them using standard DevOps workflows (e.g., [git push](#)), and run them in Heroku's secure, scalable, and managed environment.



Customer's Heroku Account

Why AppLink and MCP are so powerful for Agentforce

AppLink and MCP are two sides of the same coin, working together to provide a robust, scalable, and developer-friendly framework for agent extensibility. AppLink is the secure **transport layer** (the “how”), while MCP is the standardized **language for tool usage** (the “what”).

Consider the process of giving an Agentforce agent a **new skill**, like

✦ calculating
a complex
insurance quote



- 1. Build the logic:**
A developer uses Python and advanced data analysis libraries to build complex quoting logic, then deploys it as an application on Heroku.
- 2. Define the tool:**
The Heroku application is built as an **MCP server**, which advertises its “CalculateQuote” tool in a standardized format that any MCP-compliant agent can understand.
- 3. Establish the connection:**
Heroku AppLink provides the secure, authenticated connection from the Salesforce org to the Heroku app. It handles passing the user’s context and the request payload.
- 4. Agent invocation:**
When a user requests a quote from the Agentforce agent, the agent’s reasoning engine identifies the need for the “CalculateQuote” tool. It uses the AppLink connection to securely invoke the tool on the Heroku MCP server, passing the required inputs.
- 5. Execution and response:**
The Python code on Heroku executes, performs the complex calculation, and returns the result to the agent, which then presents it to the user.



This combination creates a powerful and elegant architecture, turning Heroku into an infinitely expandable “brain extension” for Agentforce, allowing organizations to build highly customized, secure, and intelligent AI-driven solutions.



Securing Salesforce integrations with Heroku AppLink

Many companies often leverage third-party or custom services to extend their orgs, and they do so with two common options: Connected Apps and External Services. Connected Apps let third-party vendors or custom code call Salesforce APIs using long-lived OAuth tokens, while External Services call vendor APIs through declarative configurations with vendor-managed hosting, scaling, and endpoint security. While both approaches deliver functionality, the dynamic security threat landscape challenges us to continuously improve the risk and governance of our applications.

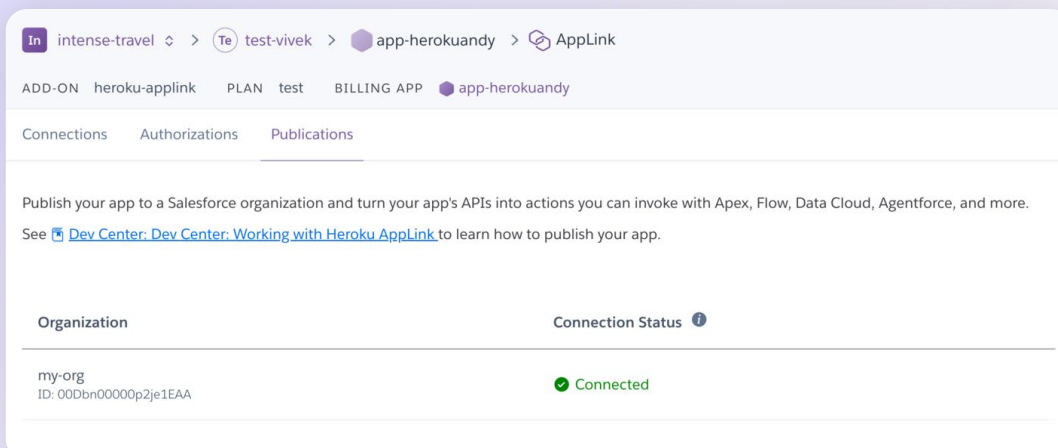
Heroku AppLink improves your security model and provides a managed bridge between Salesforce and Heroku, so developers or vendors can deploy services in any language and expose them as native Salesforce actions. Heroku AppLink automatically handles authentication, service discovery, and request validation while its service mesh and short-lived credentials mean that your integrations no longer depend on stored credentials or exposed endpoints. Development teams can reuse existing code and libraries instead of rewriting in Apex, admins get centralized visibility into connections and authorizations, and security teams gain tighter trust boundaries across both Connected App and External Service scenarios.

Salesforce orgs often call out to external logic like AI models, payment gateways, or industry-specific APIs that live on public clouds or are operated by a third-party vendor. Traditionally, the vendors expose a public endpoint and trust any client presenting a bearer token. This delivers functionality but creates risk. If a token is stolen or the endpoint is misconfigured, attackers can replay calls and pull data directly from Salesforce.

Heroku AppLink solves this by putting a service mesh in front of the integration service when it is deployed. Instead of a public endpoint, only Salesforce orgs that you explicitly connect can reach the app. The mesh validates each request before handing safe context to the SDK. This ensures that inbound traffic is authenticated at the org level, not just by a token.

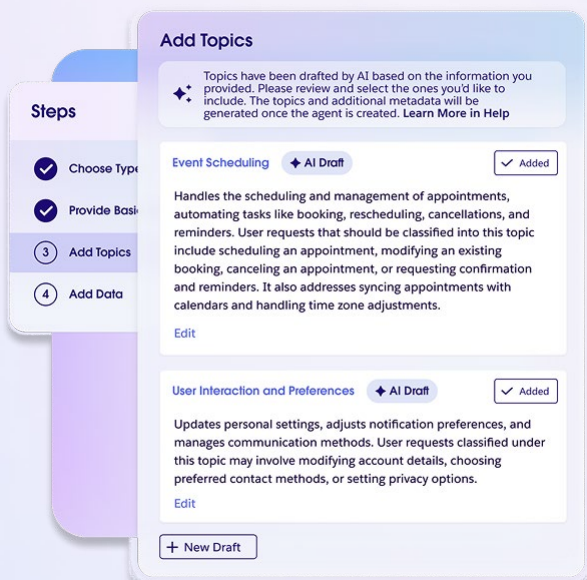
For companies, this means you can ask vendors to move their integration service onto Heroku with AppLink and gain the assurance that only your org can invoke it. For vendors, it means they can take the same Node.js or Python service running in AWS or Azure, deploy it to Heroku, and instantly benefit from Salesforce-native request validation.

Find a [step by step guide](#) on securing salesforce integrations with Heroku AppLink.



From vision to reality: a roadmap for implementation

Successfully deploying supercharged AI agents requires more than just powerful technology; it demands a clear strategy, a structured implementation path, and a commitment to continuous improvement. This section provides a practical roadmap for turning the vision of an agentic enterprise into a reality.

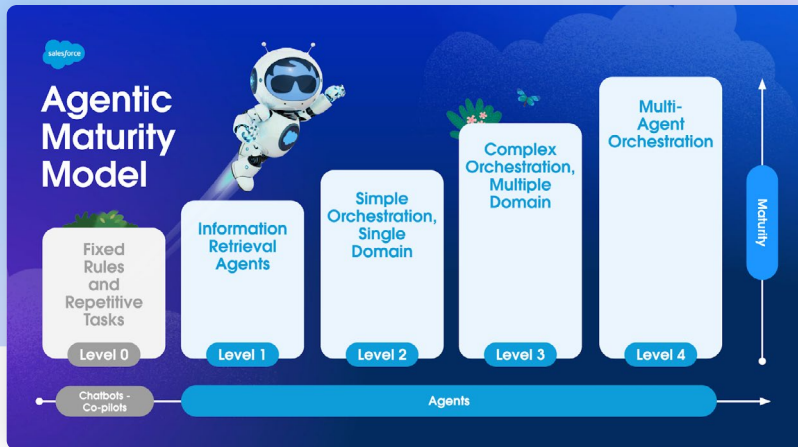


Strategic planning and use case definition:

The journey begins with strategic planning. AI initiatives must be tightly aligned with core business goals to deliver measurable value.

- ✓ **Define your AI vision:** Start by articulating the organization's overarching strategic vision and craft an AI vision that helps you achieve it.
- ✓ **Identify high-impact use cases:** Pinpoint specific "jobs to be done" that Agentforce agents can solve. Focus on areas that will provide always-on support to employees or customers and deliver the highest business impact.
- ✓ **Process mapping:** For each use case, create a detailed process map. Outline the ideal user experience, how the system will respond to various inputs, and how potential errors will be handled. This diagram is crucial for generating clear instructions for the agent and identifying where to effectively use actions, variables, and filters.
- ✓ **Define key use case attributes:** When defining a use case, consider these five critical dimensions:
 - **Role:** What is the agent's primary function? (e.g., service agent, sales assistant)
 - **Data:** What knowledge sources can it access? (e.g., Salesforce knowledge, external databases)
 - **Actions:** What specific capabilities does it have? (e.g., update case, calculate quote)
 - **Guardrails:** What should it not do? (e.g., Do not provide financial advice)
 - **Channel:** Where will it interact with users? (e.g., web chat, Slack, WhatsApp)

The Agentic Maturity Model: charting your course



To help organizations navigate their AI journey, Salesforce developed the Agentic Maturity Model. This strategic framework provides a structured path for progressing from basic automation to sophisticated multi-agent orchestration, allowing businesses to assess their current state and plan their evolution.

Level Name	What it is	Example	How to advance
Level 0 Fixed rules & repetitive tasks	Basic automation of repetitive tasks using predefined rules, with no reasoning or learning capabilities.	A chatbot handling password resets or answering FAQs based on a simple decision tree.	Identify limitations of rigid rules, quantify capacity saved, and select low-risk use cases.
Level 1 Information retrieval agents	Agents that assist humans by retrieving information from structured and unstructured sources and recommending actions.	A support agent pulling data from a knowledge base to suggest troubleshooting articles for a support ticket.	Shift from recommendations to autonomous execution, harmonize data sources, and measure ROI.
Level 2 Simple orchestration, single domain	Agents that autonomously orchestrate multi-step, low-complexity tasks within a siloed data environment or single system.	An agent that schedules meetings and automates follow-up emails using internal calendar and email systems.	Grant agents access with least privilege, design scalable architecture, and use APIs to extend capabilities.
Level 3 Complex orchestration, multiple domains	Agents that autonomously orchestrate multiple workflows with harmonized data across multiple domains or departments.	An agent managing a sales pipeline by pulling data from CRM, service tickets, and financial reports to create a holistic customer view.	Focus on near-real-time, cross-domain agent collaboration, develop a universal agent communication layer, and establish robust governance.
Level 4 Multi-agent orchestration	Any-to-any agent operability across disparate systems with agent supervision and collaboration.	Multiple agents from different systems collaborating to autonomously process orders, manage inventory, and route feedback in near-real time.	Evolve security for ecosystem-wide collaboration, explore new business models, and develop metrics to quantify multi-agent value.

Establish your position on the Agentic Maturity Model

Determining your organization's current and desired position on the Agentic Maturity Model is a critical strategic exercise. This requires an honest, holistic assessment of your capabilities and aspirations.

This assessment goes beyond just technology. It must consider broader organizational factors:

- ? Data readiness:** How clean, integrated, and accessible is your data? As maturity increases, the need for harmonized data across multiple systems becomes paramount.
- ? Governance and risk mitigation:** Do you have a robust governance framework? This should include clear testing methods, performance metrics, continuous monitoring, and strategies for gathering user feedback.
- ? Workforce readiness:** Have you invested in upskilling your teams to foster seamless human-agent collaboration? The goal is not to replace humans, but to augment them.

Alpine Intel, an insurance solutions provider, leverages this framework to bring order to its process of scaling agentic capabilities. The framework helps Alpine Intel identify its current position and sparks ideas for future steps, such as developing time-saving summary agents and multi-org applications.

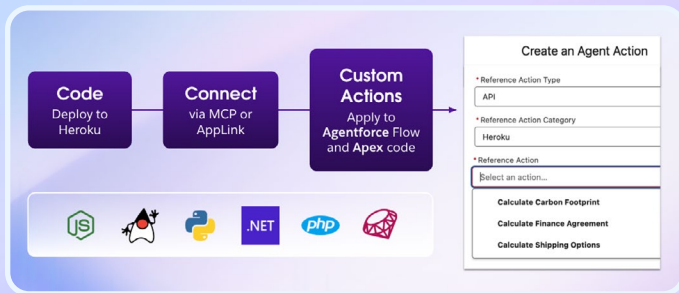


“As a business handling high volumes of insurance claims, every minute we save counts. Salesforce's framework brings order to what can feel like chaos, offering a clear path for how and when to scale agentic capabilities. It not only helps us identify where we are today, but sparks ideas for what's next—from creating time-saving summaries to exploring multi-org applications across our acquisitions. That kind of clarity is rare in emerging tech, and exactly what we need to turn vision into value.

Kelly Bentubo, Director of Architecture, Alpine Intel

Building custom Heroku actions

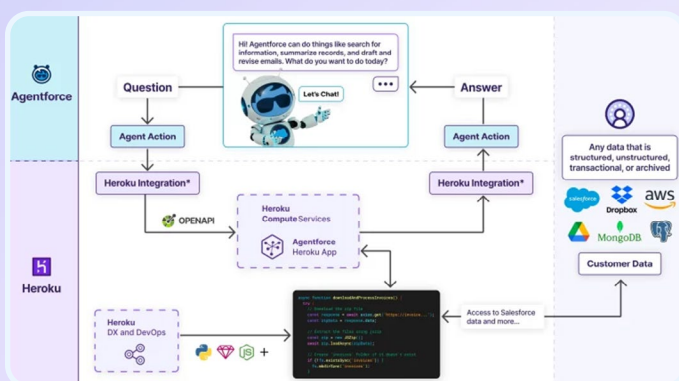
Building custom actions on Heroku is the key to unlocking the advanced capabilities of Agentforce. The process is straightforward for developers familiar with modern application development.



- ✓ **Choose your language:** Select the best programming language for the task from Heroku's extensive list of supported languages (e.g., Python, Java, Node.js).
- ✓ **Develop the API:** Implement the core business logic of your action and expose it as a REST API endpoint.
- ✓ **Define the OpenAPI schema:** Create an OpenAPI (Swagger) file that describes your API's inputs, outputs, and endpoints. This machine-readable contract is what allows Heroku AppLink to automatically configure the action in Salesforce.
- ✓ **Deploy to Heroku:** With Heroku's simplified deployment workflow, pushing your code to a live, production-ready environment can be as simple as a single command: `git push heroku main`.

Integrating Heroku actions with Agentforce

Once the custom action is deployed on Heroku, the final step is to integrate it with Agentforce so the agent can begin using its new skill.



- ✓ **Define the external service:** In Salesforce Setup, use the point-and-click interface to create a new external service, importing the OpenAPI schema from your Heroku application. Salesforce automatically parses the schema and creates the necessary invocable actions.
- ✓ **Create a named credential:** Configure a named credential to securely store the authentication details for your Heroku service, ensuring all communication is secure and authenticated.
- ✓ **Define the Agentforce action:** In Agent Builder, create a new agent action that references the external service action. The most critical step here is writing the **description and instructions** for the action in clear, natural language. This text is what the Agentforce Atlas Reasoning Engine uses to understand when and how to use this new tool. A well-written description is the key to reliable and accurate action selection by the AI.

Deployment, testing, and optimization

A comprehensive approach to deployment, testing, and continuous optimization is vital for the long-term success of any AI agent solution.

Deployment



Agentforce agents can be deployed across a variety of channels to meet users where they are, including:

- Slack
- Messaging in-app & web (MIAW)
- Embedded service chat
- Salesforce flows
- Upcoming channels include WhatsApp, SMS, and email

Rigorous testing



- **Manual testing:** Perform interactive, manual testing directly within the Agent Builder interface to quickly validate agent behavior.
- **Batch testing:** Utilize the Testing Center to run a suite of pre-defined test cases against your agent. This allows you to test multiple scenarios simultaneously and evaluate performance at scale, ensuring that changes to one part of the agent's logic do not negatively impact other areas.
- **Event logs:** Enable enriched event logs to capture detailed insights into the agent's reasoning process. These logs show how the agent interpreted a user's question, which topic it selected, and why it chose a particular action, providing invaluable data for troubleshooting and refinement.

Continuous monitoring and improvement

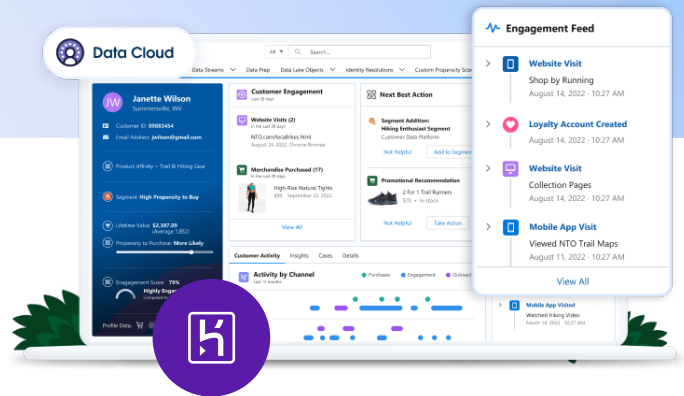


After deployment, the optimization begins. This is a continuous cycle of monitoring performance and refining the agent's configuration.

- **Agentforce analytics reports:** Leverage the powerful, Data Cloud-based reports to gain deep insights into agent performance. Key metrics include adoption rate, latency, user satisfaction, and topic use.
- **Utterance analysis:** Analyze trends in user queries to understand how people are interacting with your agent. This can reveal new use cases, identify areas where the agent is struggling, and provide data to refine topic instructions and action descriptions.
- **Session engagement report:** For service agents, track metrics like escalation rates, messages before escalation, and overall time-to-resolution to quantify the agent's impact on support operations and identify opportunities for improvement.

The agent development lifecycle is a continuous process of ideation, configuration, testing, deployment, and monitoring to ensure ongoing optimization and value delivery.

Data Cloud + Heroku for enhanced capabilities



Salesforce Data Cloud is the foundational infrastructure that unlocks the platform's most powerful capabilities. For any organization serious about building a scalable, intelligent, and trusted agentic ecosystem, Data Cloud is a highly valuable component.

Data Cloud's architecture is the engine that powers essential Agentforce features:

- **Retrieval augmented generation (RAG):** Data Cloud provides the indexing and chunking capabilities necessary for RAG, which allows agents to ground their responses in trusted company data, such as knowledge articles or product manuals, dramatically improving accuracy and reducing hallucinations. The Agentforce Data Library (ADL) leverages Data Cloud to simplify hybrid (semantic + keyword) search across this data.
- **Agent analytics:** All agent usage and performance data is streamed to Data Cloud, where it is used to generate the comprehensive reports and dashboards needed for continuous monitoring and optimization.
- **Audit trail:** Data Cloud provides the infrastructure for logging feedback and maintaining a complete audit trail for all generative AI interactions, which is critical for compliance and governance.
- **The Einstein Trust Layer:** Data Cloud is a prerequisite for leveraging the Einstein Trust Layer, which safeguards data privacy, enhances AI accuracy, and promotes the responsible use of AI across the entire Salesforce ecosystem.

Data Cloud provides powerful extensibility options for Agentforce, including:

- ✓ **Bring your own large language model (BYO-LLM):** Allows customers to integrate their own fine-tuned or preferred LLMs.
- ✓ **External data sources:** Enables agents to ground AI-generated responses in data from external, non-CRM sources, unified within Data Cloud.
- ✓ **Near-real-time data graphs:** Allows agents to use a normalized, near-real-time view of data from multiple sources within Data Cloud to ground their responses with up-to-the-second accuracy.

Data Cloud provides the hyperscale, petabyte-scale data infrastructure required for Agentforce to handle the largest and most complex enterprise datasets, making it a cornerstone of any mature AI strategy.

Your agentic future: conclusion and next steps

The combination of Agentforce and Heroku represents a paradigm shift in enterprise AI. It moves organizations beyond the limitations of rigid automation and into a future where a flexible, intelligent, and scalable digital workforce can collaborate with humans to drive unprecedented levels of customer success and operational excellence. Agentforce and Heroku together provide a complete platform for building next-generation business automation, with Agentforce delivering the agentic layer and Heroku powering the pro-code engine.

Questions to ask your organization

As you consider implementing or expanding Agentforce with Heroku, facilitate a strategic conversation within your organization by asking these critical questions:



What are our most pressing “jobs to be done” that could benefit from dynamic, AI-driven automation?



What specific computational bottlenecks or governor limits are we encountering in Salesforce that could be offloaded to Heroku?



Do we have vast amounts of unstructured, historical, or external data that our agents need to access and analyze in near-real time to be effective?



What is our current position on the Agentic Maturity Model, and what is our strategic roadmap for advancing to higher levels?



How can we leverage Heroku’s polyglot support and developer flexibility to empower our teams to build custom agent actions more quickly and securely?



How will we ensure robust security, compliance, and data governance as our agents become more autonomous and interact with diverse data sources?



What operational efficiencies and revenue growth opportunities can we realistically expect to achieve by integrating Agentforce with Heroku?

How to get started

Getting started with Agentforce and Heroku involves a structured, iterative approach that emphasizes strategic planning, agile development, and continuous monitoring.

1. **Ideate and plan:** Define your AI vision, identify a high-impact initial use case, and create detailed process maps for your agents. Determine your position on the Agentic Maturity Model.
2. **Setup and configuration:** Lay the technical foundation by enabling agents, Einstein, and the Trust Layer in your Salesforce org. Configure your first agent, defining its topics, instructions, and actions with clear, descriptive metadata.
3. **Data integration:** Evaluate your data landscape. Enable Data Cloud for RAG, analytics, and unstructured data processing. For external data or complex transformations, plan to use Heroku Connect or custom Heroku actions.
4. **Build custom Heroku actions:** Develop your specialized services on Heroku using your team's preferred programming language, ensuring they adhere to the OpenAPI standard for seamless integration.
5. **Integrate with Agentforce:** Expose your Heroku services as external services in Salesforce, create named credentials for security, and define the corresponding Agentforce actions in Agent Builder, paying close attention to the natural language instructions.
6. **Test and deploy:** Rigorously test your agents using manual and batch testing in the Testing Center. Monitor event logs to troubleshoot and optimize agent performance before deploying to your chosen channels.
7. **Monitor and improve:** Continuously monitor agent performance using Agentforce Analytics Reports. Analyze user utterances and session engagement to identify areas for improvement and iterate on topics, instructions, and actions for ongoing optimization.

Next steps

To embark on or accelerate your journey with supercharged agents, consider the following next steps:



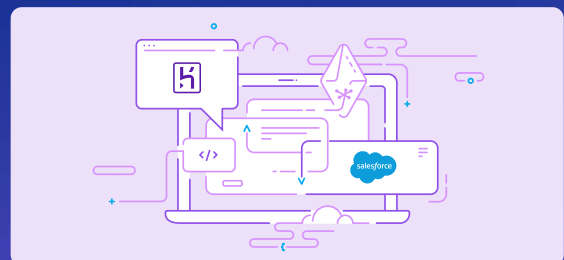
Watch demos and get expert guidance

Engage with available product demonstrations and connect with Salesforce representatives to discuss your specific business needs and see how this powerful combination can address them.



Deep dive into resources

Utilize the wealth of available resources in the Heroku Dev Center by starting with the AppLink resources, to build foundational knowledge.



Start your journey

Schedule a call with an architect to uncover the right Heroku and Agentforce solution for your company.



Thank you