

Accounting Seed Agents – Configuration Details

What Can Be Configured

1. During creation of agents from a template
 - a. Can add or remove topics altogether

← Agent Creator New Agent

Steps

- ✓ Select an agent
- 2 Select your topics**
- 3 Customize your agent
- 4 Select Language and Tone

Select your agent's topics
Topics are the jobs your agent can do. Agents have topics that are pre-selected for you, but you can deselect any you don't want to include. **You can edit topics in a later step.**

Communications & Notifications ✓ Added
Handles customer communications, including sending overdue billing notice emails to let customers know they are past due on payment.
[See Included Actions](#)

Billing Status & Inquiry ✓ Added
Performs record searches based on user inputs.
[See Included Actions](#)

Customer Payment Analytics and Predictions ✓ Added
This topic focuses on analyzing customer payment data and providing predictive insights related to payment trends and behaviors.
[See Included Actions](#)

- b. Can customize the name, description, API Name, Role, Company, and whether event logs should be tracked

← Agentforce Builder Collections Agent Version 1 ▾

Topics

← Topic Details

Filter Copy Close Co

Credit Memo always refers to a Billing (AcctSeed__Billing__c) with Type (AcctSeed__Type__c) = 'Credit Memo'.

* Instruction ⓘ

Always include the Customer field (AcctSeed__Customer__c) when querying Billings (AcctSeed__Billing__c) or Cash Receipts (AcctSeed__Cash_Receipt__c) and display to the user.

* Instruction ⓘ

'Open' always means the record is posted and has a balance greater than 0.

* Instruction ⓘ

Never query the Customer object. If asked about customers this means the Account object.

* Instruction ⓘ

'past due' always means overdue.

* Instruction ⓘ

When querying customers with overdue billings (past due billings), search for Accounts which are related to 1 or more overdue Billings. If a number of days overdue / past due is not provided the use Billings with AcctSeed__Due_Date2__c < TODAY.
Example query which finds customers with billings 90 days past due, 'SELECT Name FROM Account WHERE Id IN (SELECT AcctSeed__Customer__c FROM AcctSeed__Billing__c WHERE AcctSeed__Due_Date2__c <= LAST_N_DAYS:90 AND AcctSeed__Balance__c > 0 AND AcctSeed__Type__c = 'Invoice')'
Example suggestions: Which customers have overdue billings? Find customers with billings that are 90 days past due.

Add Instructions

Example User Input ⓘ

b. Topic configuration can be adjusted

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Topics

← Topic Details

Filter Copy Close

Topic Configuration This Topic's Actions

You're customizing

Billing Status & Inquiry

Name

Billing Status & Inquiry

API Name

Billing_Status_Inquiry_16jgL000000oQgr

* Classification Description ⓘ

Performs record searches based on user inputs.

* Scope ⓘ

Your job is to query and filter records as requested by the user. You will not perform tasks outside of these operations.

c. Actions can be removed

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Topics

← Topic Details Filter Sort Close

Topic Configuration This Topic's Actions

Manage the actions assigned to your topic. To add or remove actions, your agent must be deactivated. New ▾

Search actions...

6 items • Sorted by Agent Action Label(asc)

Agent Action La...	Description	Source	Reference Action ...	Last Modified	Created By	
Identify Record by N...	Searches for Salesforce...	Custom	Standard	Nov 13, 2025	Carly Crossland	
Summarize Record	Summarizes a single Sal...	Custom	Standard	Nov 13, 2025	Carly Cr	
Identify Object by N...	Finds the Salesforce obj...	Custom	Standard	Nov 13, 2025	Carly Cr	
Query Records	Finds and retrieves Sale...	Custom	Standard	Nov 13, 2025	Carly Crossland	
Get Record Details	Generates a text blob c...	Custom	Standard	Nov 13, 2025	Carly Crossland	
Query Records with	Answers aggregation qu...	Custom	Standard	Nov 13, 2025	Carly Crossland	

d. Custom Actions can be added

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Topics

← Topic Details Filter Sort Close Conversation

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Query Records with	Answers aggregation qu...	Custom	Standard	Nov 13, 2025	Carly Crossland	

+ Create New Action
+ Add from Asset Library
+ Add from AgentExchange

3. Permission sets can be customized

a. "Accounting Seed Agents" permission set can be cloned and adjusted for custom security settings

SETUP

Permission Sets

Permission Set Accounting Seed Agents Video Tutorial | Help for this Page ?


Find Settings... Manage Assignments View Summary

Permission Set Overview

Description	Accounting_Seed_Agents
License	AcctSeedAgent
Session Activation Required	<input type="checkbox"/>
Created By	Carly Crossland, 11/12/2025, 2:14 PM
Last Modified By	Carly Crossland, 11/12/2025, 2:14 PM
Permission Set Groups Added To	0

What Cannot Be Configured

1. Apex Actions. The Apex Class is Global, so it can be utilized, but the code is not visible or modifiable. Alternatively, custom Apex Classes can be created.

 **Apex Classes**

Apex Class

CreatePaymentProposal

Help for this Page ?

This Apex Class is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Apex Class Detail

EditSecurityShow Coverage

Name	CreatePaymentProposal	Status	Active
Namespace Prefix	AcctSeedAgent	Installed Package	Accounting Seed Agents
Created By	Carly Crossland , 11/12/2025, 2:14 PM		
Last Modified By	Carly Crossland , 11/12/2025, 2:14 PM		

Class Summary

Version SettingsTrace Flags

global class CreatePaymentProposal

Constructors (1)

SignatureCreatePaymentProposal()

Methods (2)

SignatureANY clone()

static List createPaymentProposalRecords(List request)

Inner Class

global class InputParams

Properties (5)

Name