

ReferenceEdgeAI

Powered by **Agentforce**

Welcome to the Future of Customer Advocacy

Customer advocacy is evolving fast—and ReferenceEdgeAI is built to put you ahead of the curve.

Powered exclusively by Salesforce Agentforce and seamlessly integrated with your existing ReferenceEdge package, ReferenceEdgeAI introduces the Advocate Agent: your always-on, AI-powered partner for accelerating customer marketing and advocacy.

Imagine finding the perfect customer reference in seconds. Surfacing buried quotes from structured and unstructured data without breaking a sweat. Drafting polished customer content in moments instead of hours. Whether you're in Salesforce, collaborating through Slack, or scaling your advocacy program, ReferenceEdgeAI delivers intelligent, real-time insights and automates the heavy lifting—without compromising data security.

Meet your
Advocate Agent



And here's the kicker: because ReferenceEdgeAI lives 100% inside your Salesforce environment, your data never leaves your control. Salesforce's Einstein Trust Layer ensures enterprise-grade security, grounding, and transparency at every step.

This isn't just an add-on—it's the start of a new era where advocacy, customer intelligence, and AI work together to drive revenue, influence buyers, and elevate your brand.

Welcome to smarter advocacy. Let's go.

ReferenceEdgeAI FAQs

What is ReferenceEdgeAI?

 ReferenceEdgeAI is a separate package. It's dependent on the ReferenceEdge package. It uses Salesforce Agentforce exclusively. The agent is called the Advocate Agent.

What's needed in Salesforce to use ReferenceEdgeAI?

 Agentforce and required, related components (e.g., Data Cloud). Your Salesforce account executive will be able to provide a list based on your intended uses of Agentforce.

How do I know if my company has Agentforce?

 Check with your Salesforce system administration team, which would have installed it if you have it.

How much does Agentforce cost?

 The suite of products is included in the enterprise and unlimited Salesforce editions. There is currently a consumption pricing model based on a pool of credits allotted to Salesforce customers, which will vary. The most accurate pricing will come from a company's assigned Salesforce account executive.

How is it installed?

 Like the ReferenceEdge package, an installation link is provided to a member of your Salesforce system administration team where it can be installed on a sandbox and tested, before deploying to your production environment.



Make your security team happy. Data never leaves the Salesforce platform.

How long does it take to install and are there costs involved?

 We don't yet have a definitive answer to this question yet, but will shortly.

How is data security protected?

 Because our solutions are built on the Salesforce platform, data never leaves your Salesforce environment. [More on the Einstein Trust Layer](#).

What's the cost of ReferenceEdgeAI?

 There is no cost in 2025. Estimated cost in 2026 will be approximately 20% of current ReferenceEdge licenses.

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What can ReferenceEdgeAI do?

- Find Advocates - find References for an Opportunity.
- Create a Request - create requests for accounts surfaced by Advocate Agent.
- Find Reference Content - find referenceable content for an Opportunity.
- Share Content - create an invitation and share the surfaced content with contacts.
- Surface Potential Content - search both structured and unstructured data to surface positive customer sentiments.
- Create Content - convert one or more of the potential quote content items that have been uncovered into Custom Reference Content.
- Generate Account Summaries - provide useful insights to executives and product managers, and for advocates in preparation for a reference call.
- Create a Nomination - facilitates the nomination of advocate program candidates.



How is it accessed?



Inside Salesforce it is accessible through the CoPilot panel. It is also accessible through Slack (requires Slack Sales Elevate add-on).



Is any configuration of Advocate Agent required?



For some agent Topics, yes. Surfacing potential content, for example, can include any number of data sources. These data source may be defined so the agent is looking in the right places. The amount of time to make these modifications will vary by customer. For other topics, like search, Agentforce is using existing ReferenceEdge code/logic, which delivers reliable results with each prompt, which ensures AI doesn't hallucinate results.



What should I be doing to prepare for ReferenceEdgeAI?



- **Polish your advocate data** – The better your data in ReferenceEdge, the smarter ReferenceEdgeAI becomes. Use Profile Update Minder consistently to keep advocate info complete and current.
- **Map your content sources** – If you want the AI to surface hidden gems, start identifying where that content lives. Every company's ecosystem is unique, so partner with your company's data guru to create an inventory of sources the agent should search.

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In Summary

ReferenceEdgeAI brings the power of Salesforce Agentforce directly into your customer advocacy strategy, transforming how you find, manage, and leverage your advocates. With the Advocate Agent at your side, you can uncover insights, surface advocates, create content, and engage customers faster—and securely, since your data never leaves your Salesforce environment.

Whether you're working inside Salesforce or collaborating through Slack, ReferenceEdgeAI helps you scale advocacy with intelligence, speed, and confidence. The future of customer marketing isn't coming—it's here, and it's built right into ReferenceEdgeAI.

Have more questions? Ask your account director or Point of Reference sales contact.