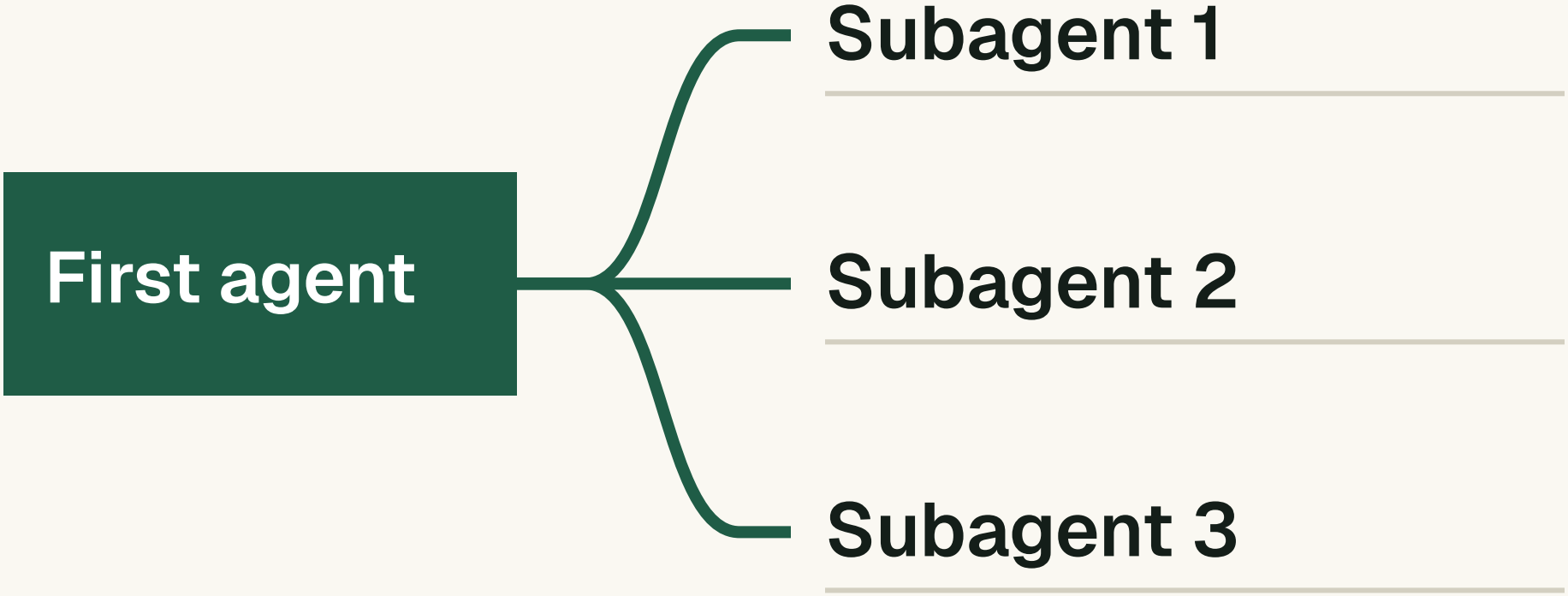
Clean Salesforce before an AI agent. 7 steps.

An agent does not repair your org. It reads what is there and answers for you.

Throughset

Decide the first agent and its subagents

Start with one agent. Write each subagent in one line.



STEP 2 OF 7

Settle who the agent runs as

Employee agent: the logged-in user. Service agent: a dedicated agent user. Limit what a service agent can reach.

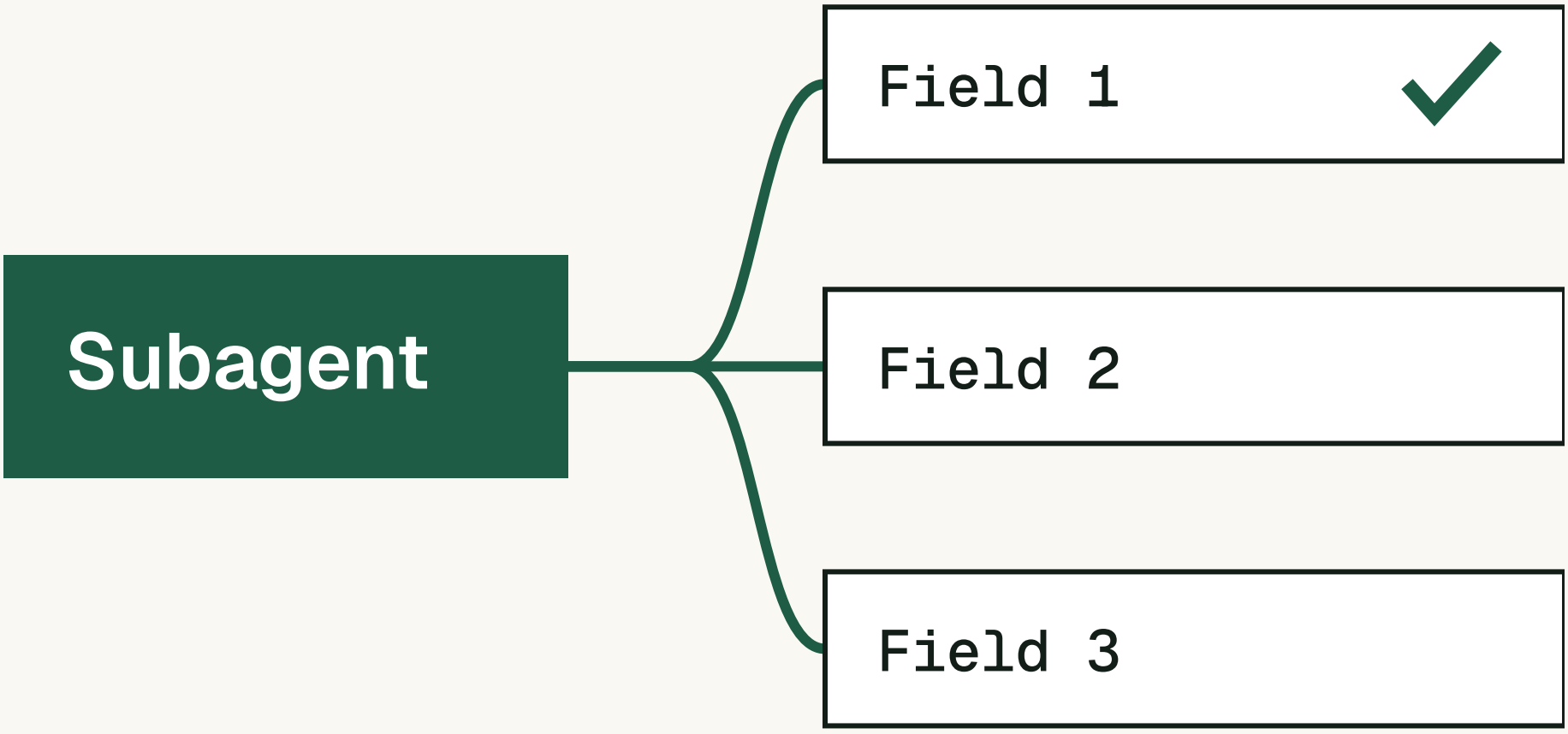
Employee agent

Service agent

STEP 3 OF 7

Clean what each subagent reads

List the objects and fields its actions read or write. Clean those first. Write a "ready when" line for each.



STEP 4 OF 7

Check every flow and Apex class it could call

Four checks on each one.

- ✓ Respects sharing?
- ✓ Primitive inputs only?
- ✓ Handles many records?
- ✓ Fits the action limits?

Give every action a distinct name

The agent picks by name and description. Rename near-duplicates and write one plain sentence for each.

`Update Opportunity Stage`

~~`Update Opp Stage v2`~~

~~`Stage Update (new)`~~

An illustration, not a real client

STEP 5 OF 7

Keep rules that must never vary in flows and Apex

A model reads instructions. Limits, thresholds and approvals belong where you can test and audit them.

INSTRUCTIONS

Read by a model

FLOW OR APEX

Limits, thresholds, approvals

STEP 6 OF 7

Test in a sandbox on your messiest records

Testing can change CRM data and uses credits. Include the contact that exists twice.

CONTACT

Pat Example
pat@example.com

CONTACT

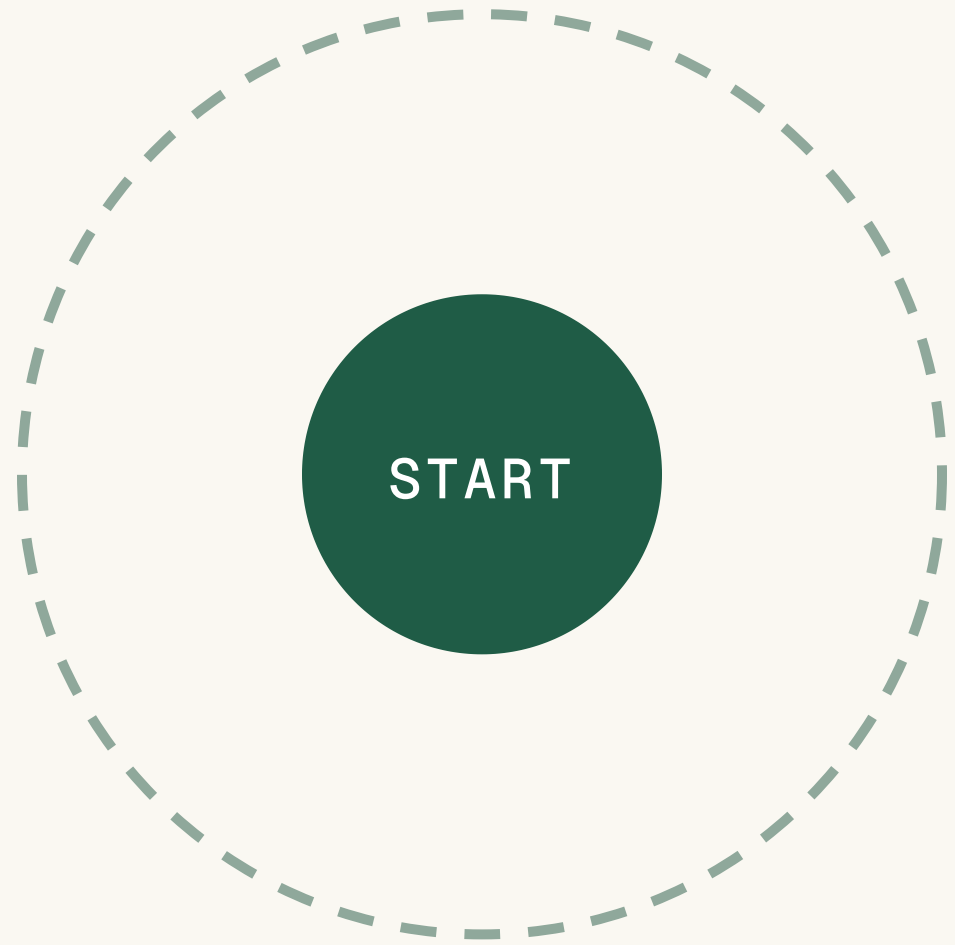
Pat Example
pat@example.com

An illustration, not a real client

STEP 7 OF 7

Launch small. Watch the traces. Widen slowly.

Widen the scope only when the results hold.



WIDEN WHEN RESULTS HOLD

THE GUIDE

Save this before your first agent goes live.

Full guide with the Salesforce sources: throughset.com/insights/clean-salesforce-before-ai-agent. Salesforce statements checked 28 October 2026.

Throughset

Your Salesforce has grown messy. We fix it.

Throughset