

Jpetto Project Manager - Agentforce Suite

User Guide Part-2

Log Hours using Einstein Copilot



P.O. Box 1085 Woodbury, CT 06798

Table of Contents

Introduction	3
Overview	3
Prerequisites of Agentforce Agents	4
How to assign Permission Set Licenses to User	4
How to assign Permission Sets to User	4
How to assign Permission Set Group to User	5
Steps to create agent actions for use case	5
Turn-On Einstein	5
Enable Agents	6
Add Agent Actions	9
Add Agent Actions to Agent	22

Introduction

This user guide explains how to use Agentforce (Einstein Copilot) within the Jpetto platform to log work hours through a conversational interface. Agentforce is configured with topics using packaged Apex-based actions such as "Log Hours," "Recent Work Items," "Assigned Work Items," and "Get Active Timesheet." These actions allow the assistant to retrieve relevant work items and record user input accurately.

Overview

In Jpetto AI Extension app users can easily log their work time in recent or assigned Work Items directly from the salesforce UI page using AI agents without navigating complex menus. To achieve this user has to create an agent/topic as outlined below to invoke the apex actions added in the package.

Scheduler will be prompted with below questions that are required to log hours:

1. Please provide your email address to proceed.
2. Would you like to see your recent work items or your assigned work items?
For Recent Work Items:
=====
3. With the selection of recent work items, AI fetches the list of all recently viewed work items of the email user specified in Step 1 with their name,title and project. Among the list users have to select one by its number to log hours.
4. Please provide the following details to log your hours:
 - Billable to Client
 - Date Worked
 - Worked Hours
 - Work Description
 - Work Type
5. Timesheet Entry record is created and returns the record ID on the screen.
For Assigned Work Items:
=====
6. With the selection of assigned work items, AI fetches the list of all work items assigned to the email user specified in Step 1 with their name and title a. Among the list users have to select one work item and submit it to log hours.
7. Please provide the following details to log your hours:
 - Billable to Client
 - Date Worked

- Worked Hours
- Work Description
- Work Type

8. Timesheet Entry record is created and returns the record ID on the screen.

To create the AI agent action above in your org then follow the steps mentioned below:

Prerequisites of Agentforce Agents:

=====

To enable Agentforce agent actions with Einstein Copilot/Custom Agentforce Agent actions users has to be assigned with few permission set licenses, permission set groups and permission set like

- Permission Set Licenses:
1. Agentforce (Default)
 2. Agentforce Service Agent Builder
 3. Einstein Prompt Templates

- Permission Sets:
1. Jpeto Agentforce Apex Classes Access
 2. Jpeto API Credentials Access
 3. Prompt Template User
 4. Agentforce Default Admin
 5. Access Agentforce Default Agent
 6. Prompt Template Manager

- Permission Set Group:
1. CopilotSalesforceAdminPSG
 2. CopilotSalesforceUserPSG

How to assign Permission Set Licenses to User:

- Step 1: Go to Setup
- Step 2: In the Quick Find box, enter Users
- Step 3: Select the user you want to assign the license to
- Step 4: In the Permission Set License Assignments related list, select Edit Assignments
- Step 5: Enable all the permission set licenses you want to assign
- Step 6: Click Save

How to assign Permission Sets to User:

- Step 1: Go to Setup
- Step 2: In the Quick Find box, type Users
- Step 3: Select the user you want to assign the permission set to

Step 4: In the Permission Set Assignments related list, click Edit Assignments

Step 5: Select all the permission sets you want to assign from Available Permission Sets

Step 6: Click Add

Step 7: Save your changes

How to assign Permission Set Group to User:

Step 1: Go to Setup

Step 2: In the Quick Find box, type Users

Step 3: Select the user you want to assign the permission set group to

Step 4: In the Permission Set Group Assignments related list, click Edit Assignments

Step 5: Select all the permission set groups you want to assign from Available Permission Set Groups

Step 6: Click Add

Step 7: Save your changes

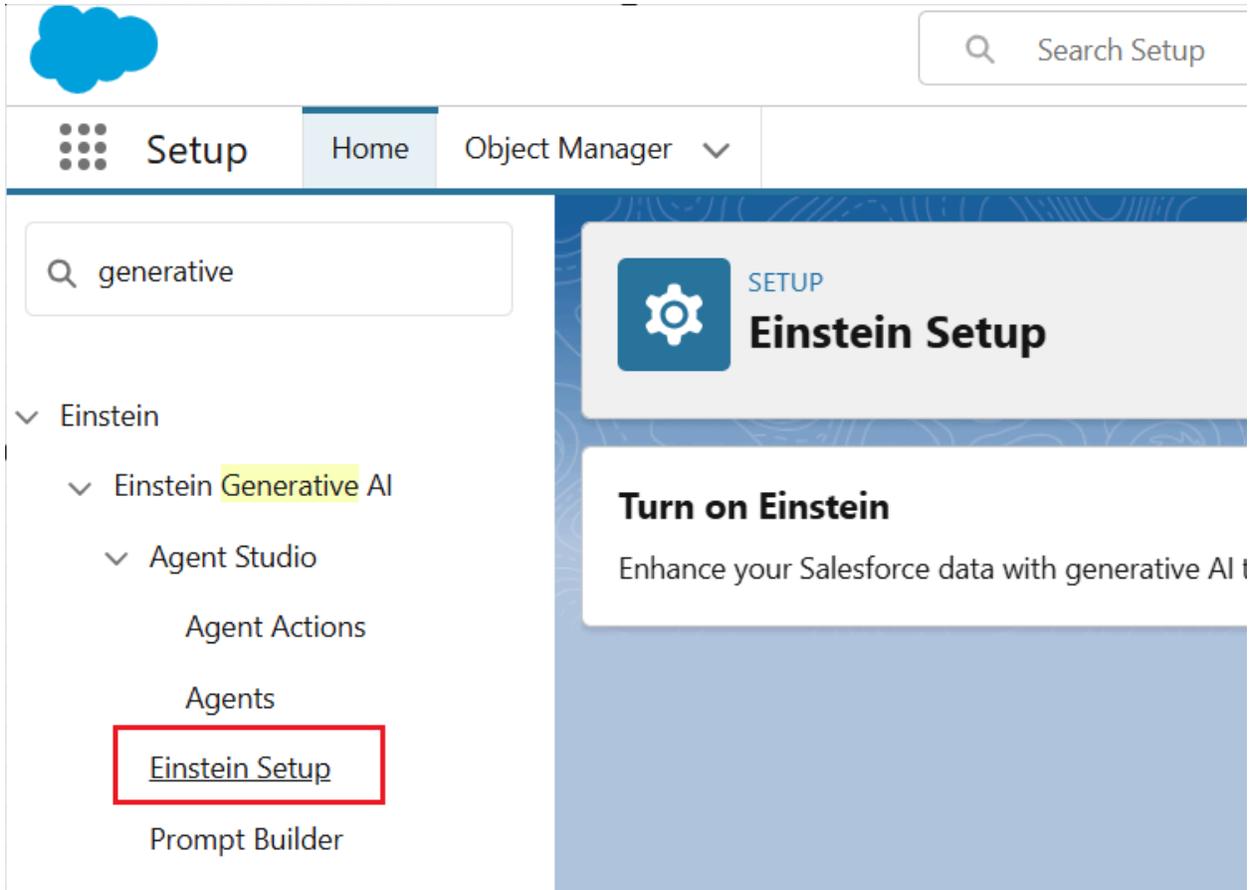
Steps to create agent actions for use case:

Turn-On Einstein

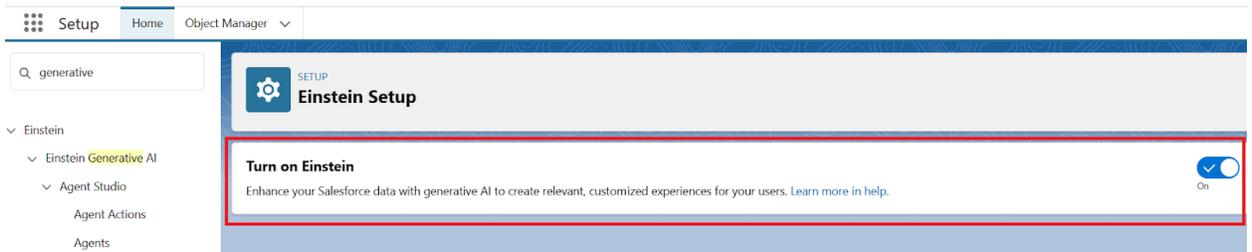
=====

Step 1: Open the Setup Menu and click Setup.

Step 2: In the Setup Quick Find, search for **Generative AI**, and select **Einstein Setup**.



Step 3: Click the **Turn on Einstein** toggle.

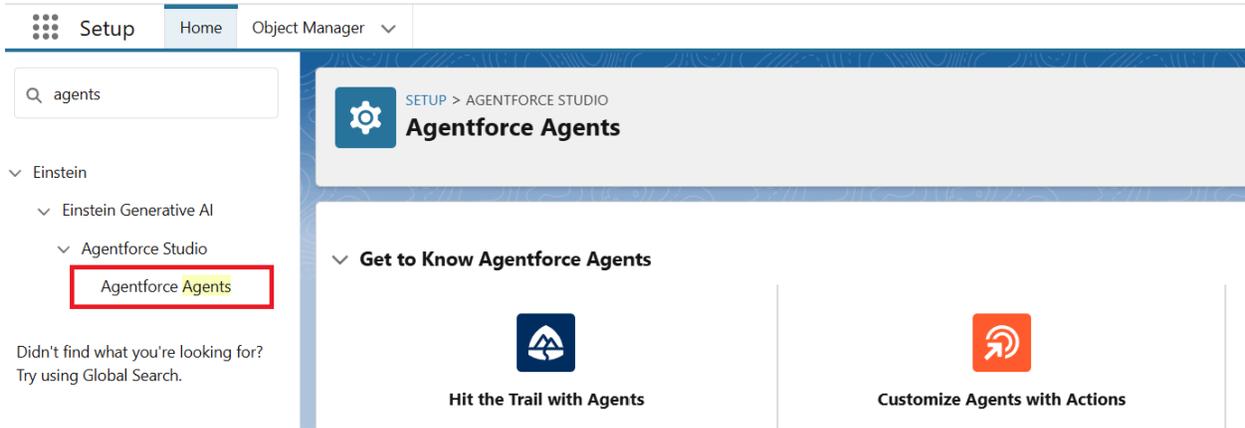


Enable Agents:

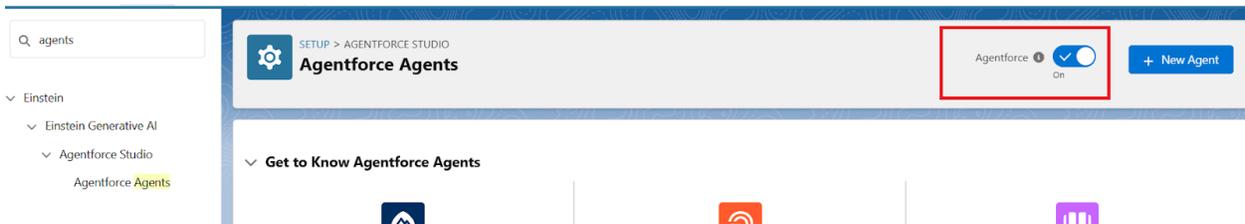
=====

Step 4: Click Setup.

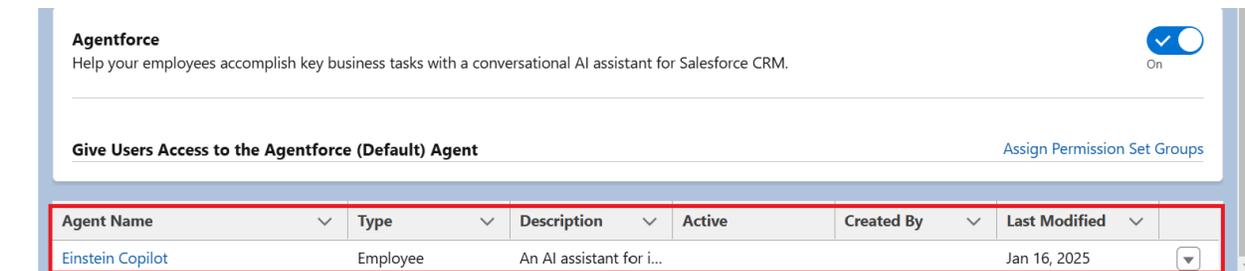
Step 5: In the quick find, search for Agents and click on **Agentforce Agents** (under Agentforce Studio).



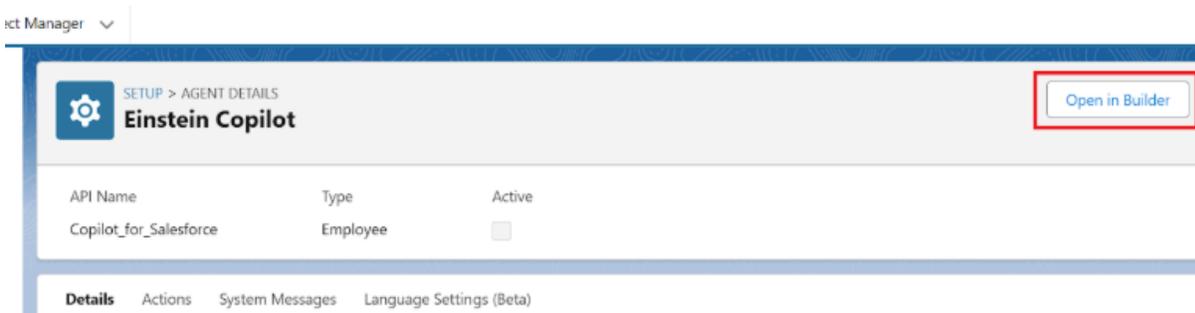
Step 6: Turn on the **Agentforce** toggle.



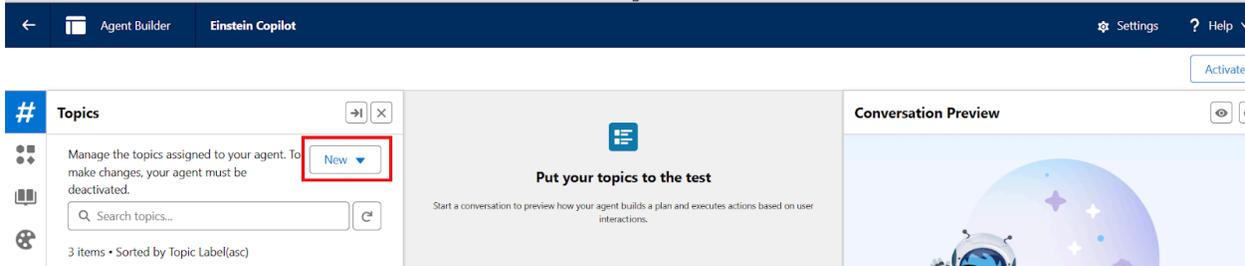
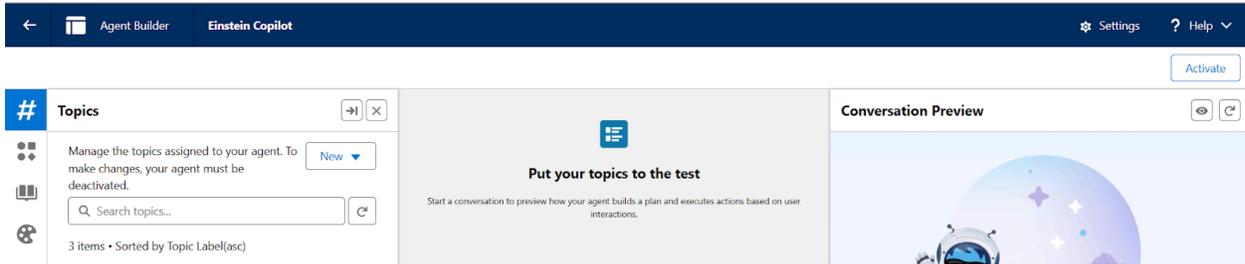
Step 7: Refresh the page, In the list of agents (at the bottom of the screen), click **Einstein Copilot** (it's the only item in the list).



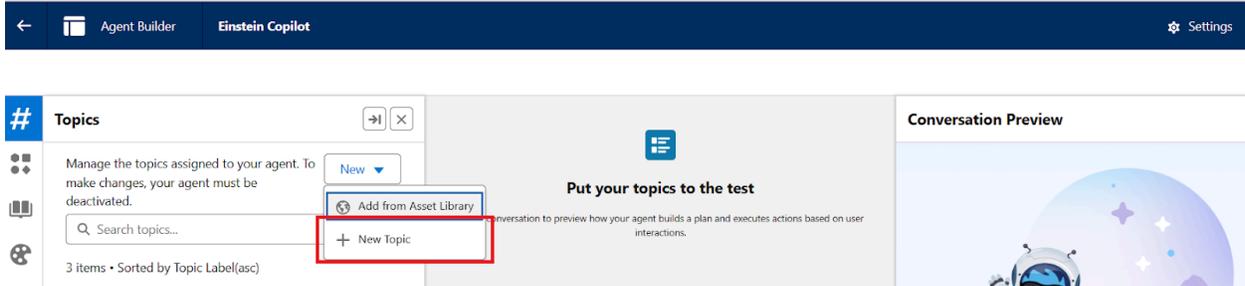
Step 8: Click **Open in Builder** (upper right corner).



Step 9: You'll be redirected to the topics page as shown in the below screenshot. In that click on the New button to create a new topic for our use case (Log Hours).



Step 10: Select **New Topic** in the **New** drop-down button.



Step 11: Fill out the below details in the sections of topic

What do you want this topic to do? (Optional) : Log work time for recent or assigned work items from Einstein Copilot.

Topic Label : Log Hours

Classification Description : This topic will be used to log hours for Jpetto Work Items.

Scope : Your job is to assist users to log hours.

Instructions :

Instruction 1: If the email provided by the user does not match, prompt them to enter the correct email.

Instruction 2: If the user wants to see recent work items use action "Get Recent Work Items" to fetch the recently viewed work items by the user and show it on the UI and ask them to select work items with their serial number. Else if user wants to see their assigned work Items use action "Get Assigned Work Items".

Instruction 3: Once user selects action above work items or View your assigned work items , use action "Get Active Timesheet" to fetch timesheet id, after fetching timesheet

id use action "Log Work Hours" to log hours. Use the work item name from the above actions.

Instruction 4: When users want to log hours, ask their email to confirm, after taking email, ask users whether they want to see their recent work item or they want to see assigned work item.

Instruction 5: While displaying the work items list display a comprehensive list instead of radio buttons.

Example User Input : Log Hours.

Step 12: Click on **Next**

Step 13: Deselect all the topics, if any are selected.

Step 14: Click on **Finish**.

Add Agent Actions

=====

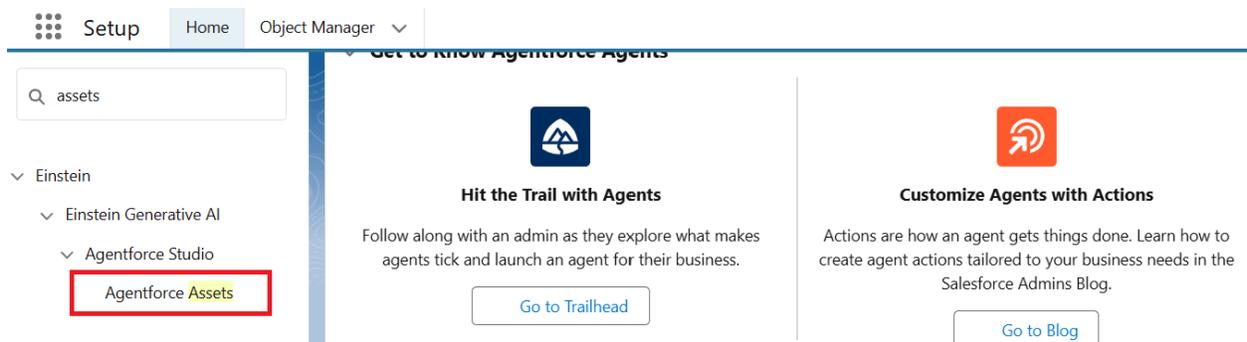
For Log Hours we have to create 4 agent actions as outlined below:

1. Get Recent Work Items
2. Get Assigned Work Items
3. Get Active Timesheet
4. Log Work Hours

1. Get Recent Work Items

Step 1: Click Setup.

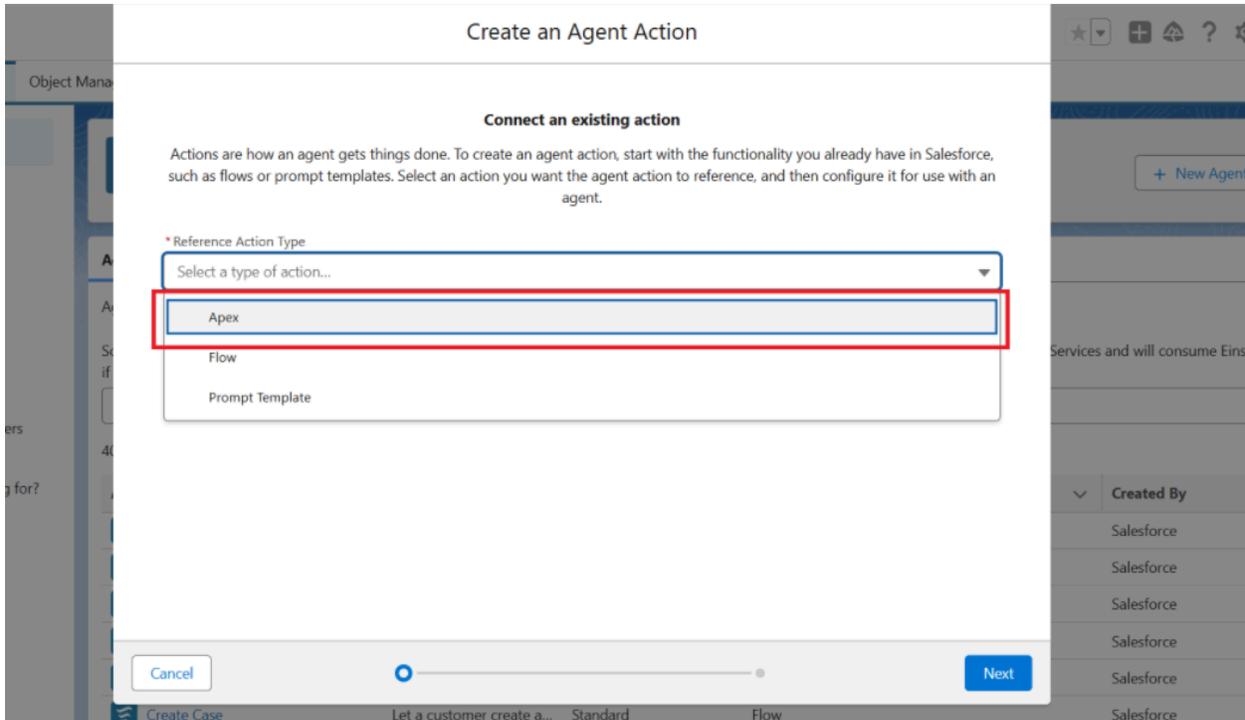
Step 2: In the quick find, search for 'Assets' and click on **Agentforce Assets** (under Agentforce Studio).



Step 3: Switch to the **Actions** tab and click on the **New Agent Action** button.



Step 4: Select 'Apex' from the **Reference Action Type** drop-down.



Step 5: Select 'Invocable Methods' from the **Reference Action Category** drop-down.

Create an Agent Action

Connect an existing action

Actions are how an agent gets things done. To create an agent action, start with the functionality you already have in Salesforce, such as flows or prompt templates. Select an action you want the agent action to reference, and then configure it for use with an agent.

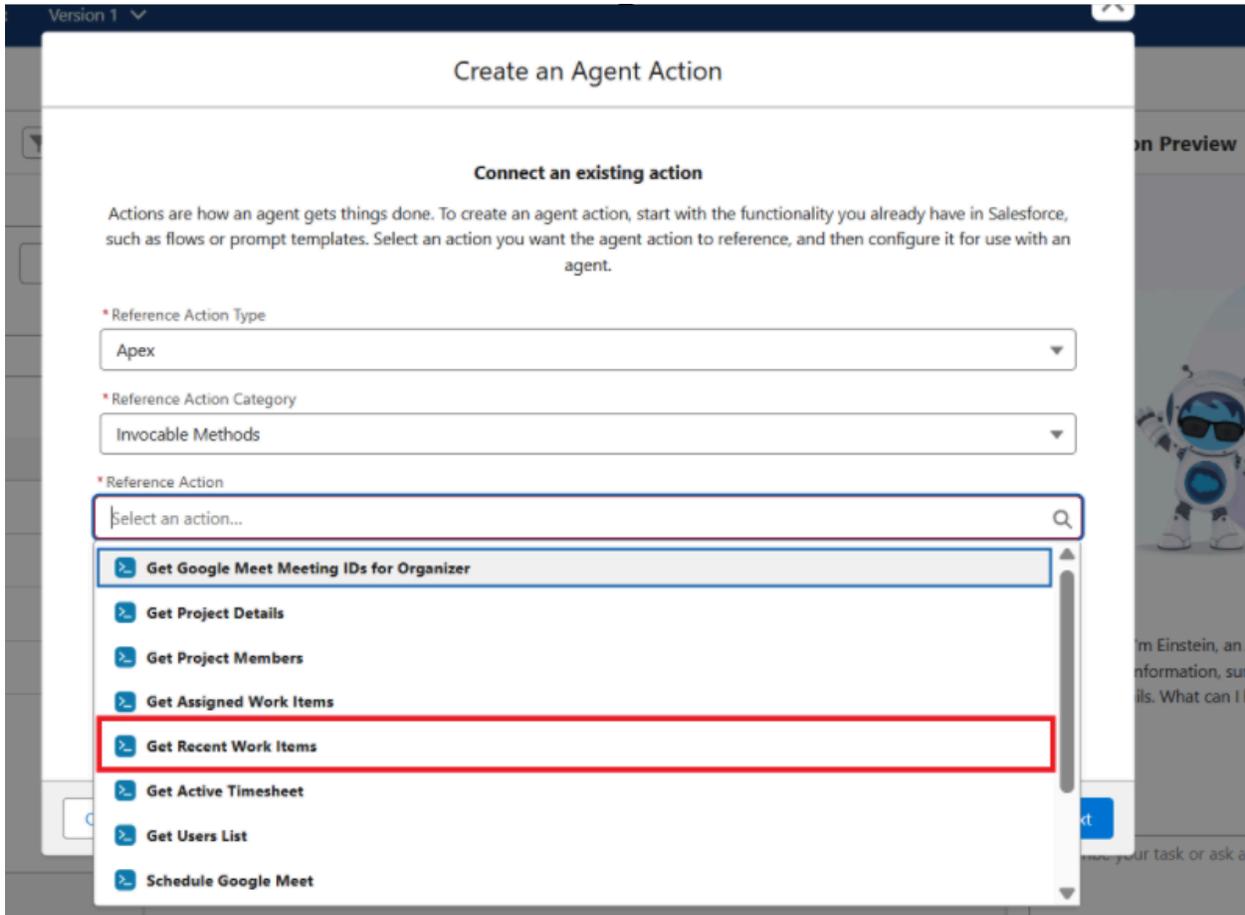
* Reference Action Type
Apex

* Reference Action Category
Select a type of action...

- Apex REST (Beta)
- Invocable Methods

Cancel ○ ● Next

Step 6: Select 'Get Recent Work Items' from the **Reference Action** drop-down.



Step 7: Click on **Next**.

Step 8: Input and output fields are auto-populated from apex classes added. To all the inputs populated enable the '**Require input**', '**Collect data from user**' checkboxes. and '**Show in conversation**' checkbox in output.

Create an Agent Action

Show loading text for this action ⓘ

* Loading Text ⓘ
Retrieving the recently viewed item for the user.

Input

User Email
userEmail

* Instructions ⓘ
User email to retrieve recently viewed work items for.

Data Type
lightning__textType

Require input
 Collect data from user

Output

output
output

* Instructions ⓘ
Name and Title of the work item.

Data Type
lightning__listType

Filter from agent action
 Show in conversation

Output Rendering
Text

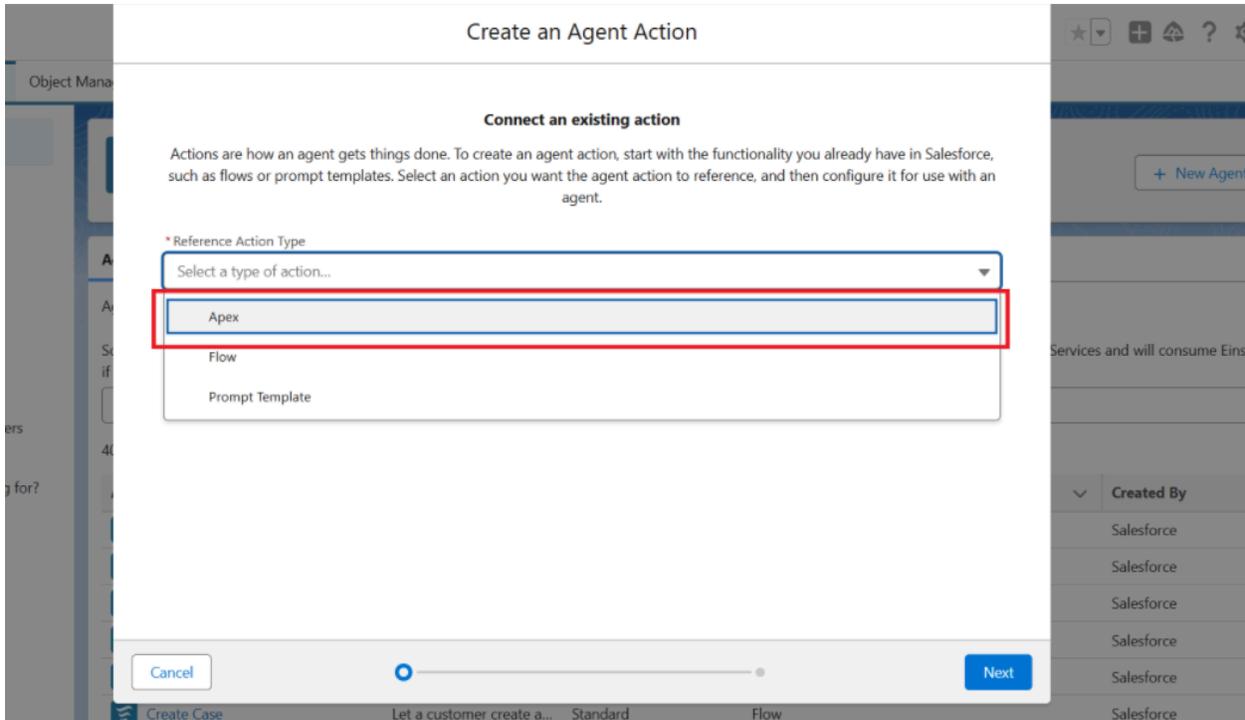
Step 9: Add this text 'Name and Title of the work item.' in the 'Instructions' field of the output Section.

Step 10: Click on the **Finish** button.

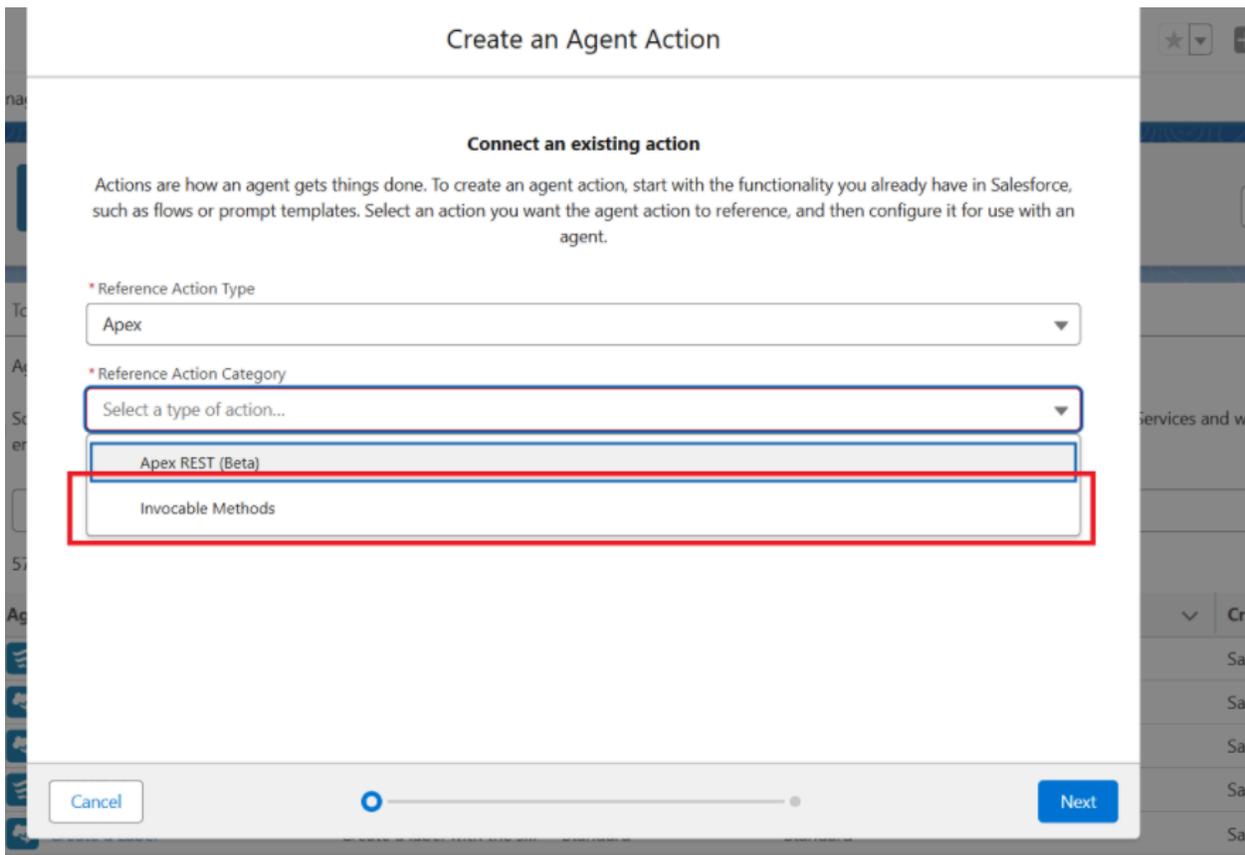
2. Get Assigned Work Items

Step 1: Go to Setup => Agentforce Assets => New Agent Action.

Step 2: Select 'Apex' from the **Reference Action Type** drop-down.



Step 3: Select 'Invocable Methods' from the Reference Action Category drop-down.



Step 4: Select 'Get Assigned Work Items' from the **Reference Action** drop-down.

The screenshot shows the 'Create an Agent Action' interface. The title is 'Create an Agent Action'. Below the title is the section 'Connect an existing action'. A paragraph explains: 'Actions are how an agent gets things done. To create an agent action, start with the functionality you already have in Salesforce, such as flows or prompt templates. Select an action you want the agent action to reference, and then configure it for use with an agent.'

There are three dropdown menus:

- *Reference Action Type: Apex
- *Reference Action Category: Invocable Methods
- *Reference Action: A search box with the placeholder text 'Select an action...'. Below the search box is a list of actions. The first item, 'Get Assigned Work Items', is highlighted with a red border. Other items include 'Get Recent Work Items', 'Get Active Timesheet', 'Get Users List', 'Schedule Google Meet', 'Log Work Hours', 'Work Items', and 'Schedule Zoom Meeting'.

Step 5: Click on **Next**.

Step 6: Input and output fields are auto-populated from apex classes added. To all the inputs populated enable the 'Require input', 'Collect data from user' checkboxes. and 'Show in conversation' checkbox in output.

Create an Agent Action

Retrieve recent assigned work items for the user

Show loading text for this action ⓘ

* Loading Text ⓘ

Retrieve assigned work items for the user

Input

User Email

* Instructions ⓘ

User email to retrieve assigned work items for.

Data Type

lightning__textType

Require input

Collect data from user

Output

output

* Instructions ⓘ

Assigned work item

Data Type

lightning__listType

Filter from agent action

Show in conversation

Output Rendering

Text

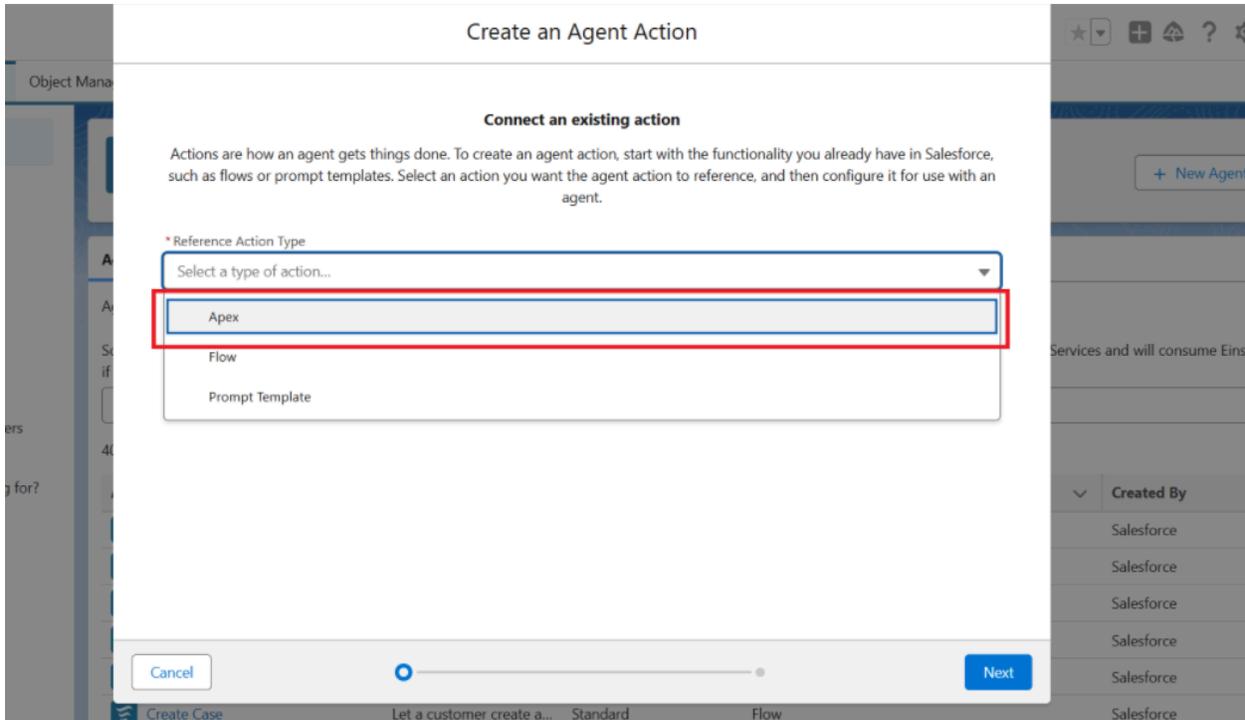
Step 7: Add this text 'Assigned work item' in the 'Instructions' field of the output Section.

Step 8: Click on the **Finish** button.

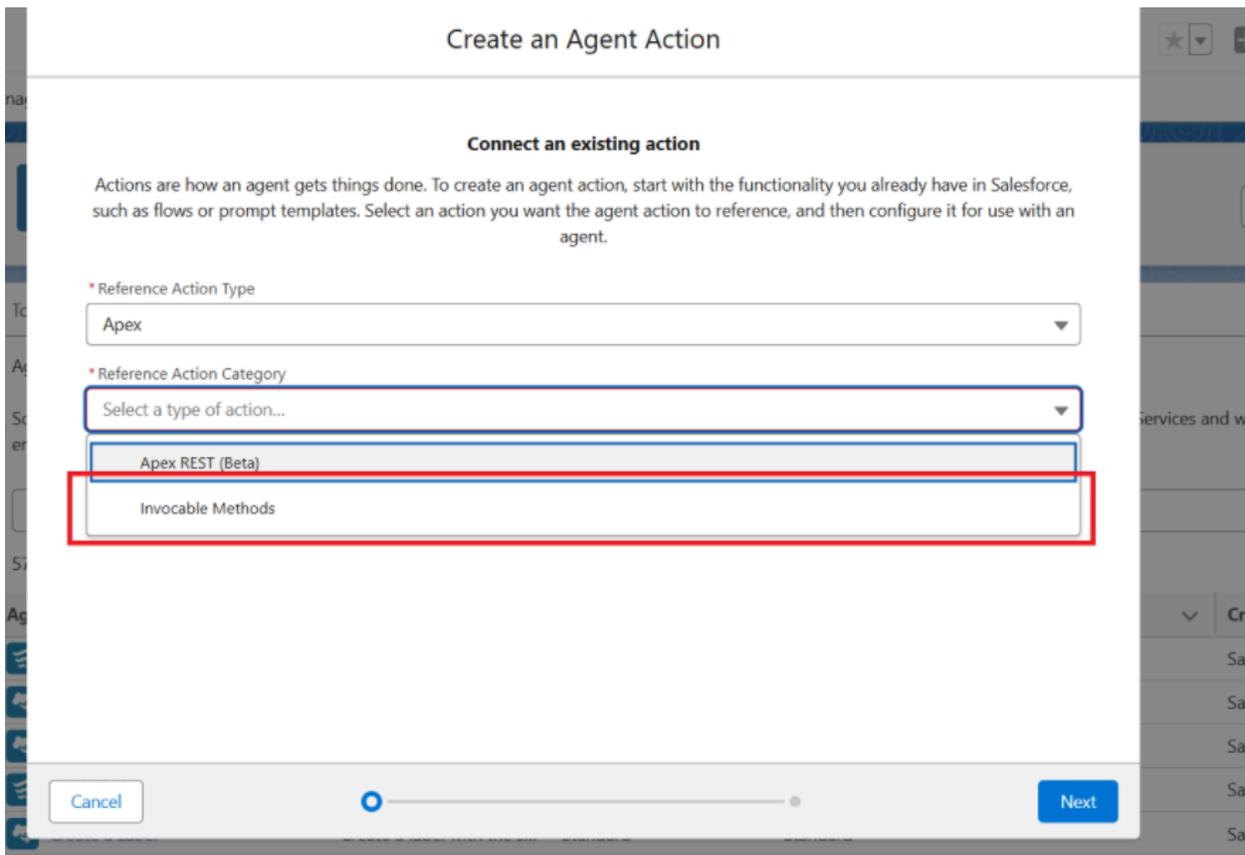
3. Get Active Timesheet

Step 1: Go to Setup => Agentforce Assets => New Agent Action.

Step 2: Select 'Apex' from the **Reference Action Type** drop-down.



Step 3: Select 'Invocable Methods' from the Reference Action Category drop-down.



Step 4: Select 'Get Active Timesheets' from the Reference Action drop-down.

Create an Agent Action

Connect an existing action

Actions are how an agent gets things done. To create an agent action, start with the functionality you already have in Salesforce, such as flows or prompt templates. Select an action you want the agent action to reference, and then configure it for use with an agent.

*Reference Action Type
Apex

*Reference Action Category
Invocable Methods

*Reference Action
Select an action...

- > Get Assigned Work Items
- > Get Recent Work Items
- > Get Active Timesheet
- > Get Users List
- > Schedule Google Meet
- > Log Work Hours
- > Work Items
- > Schedule Zoom Meeting

Describe

Step 5: Click on **Next**.

Step 6: Input and output fields are auto-populated from apex classes added. To all the inputs populated enable the **'Require input'**, **'Collect data from user'** checkboxes. and **'Show in conversation'** checkbox in output.

Create an Agent Action

*Agent Action Instructions ⓘ
Retrieve active timesheet IDs for the provided user emails

Show loading text for this action ⓘ

*Loading Text ⓘ
Retrieves the Active Timesheet for the given user.

Input

User Email
userEmail

*Instructions ⓘ
User email to retrieve the active timesheet for.

Data Type
lightning__textType

Require input
 Collect data from user

Output

output
output

*Instructions ⓘ
Returns the Timesheet ID.

Data Type
lightning__listType

Filter from agent action
 Show in conversation

Back ✓ ○ Finish

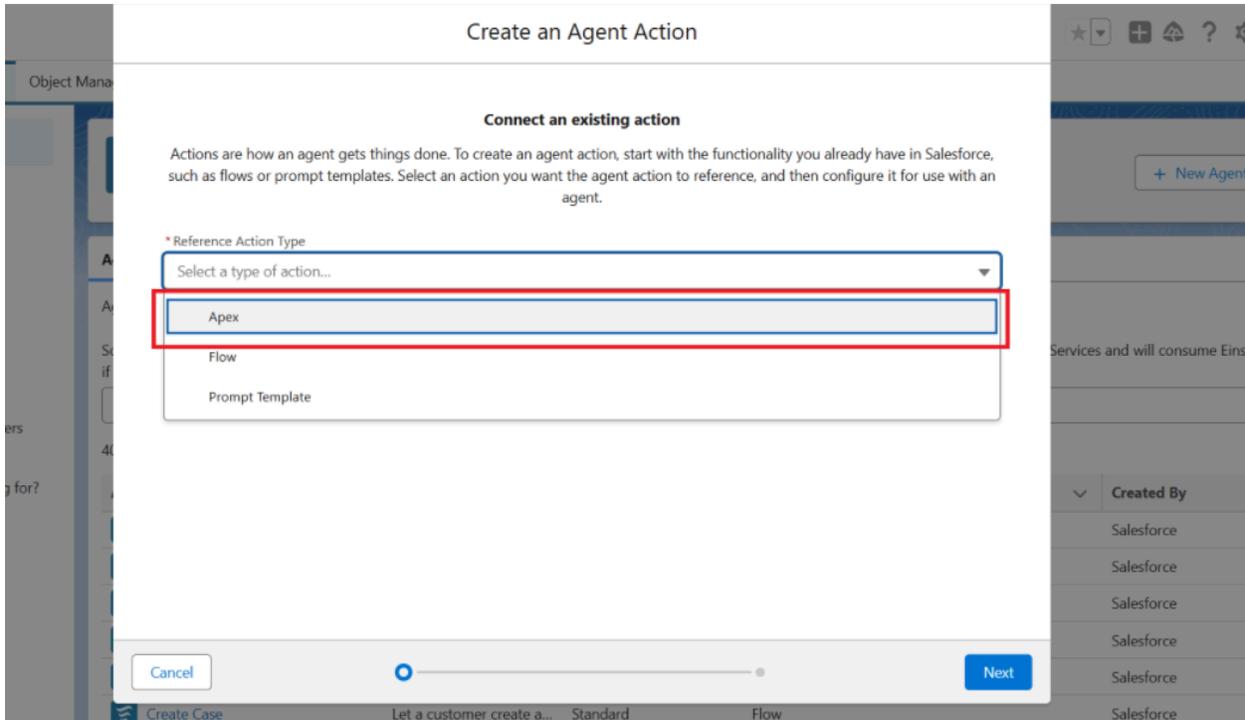
Step 7: Add this text 'Returns the Timesheet ID.' in the 'Instructions' field of the output Section.

Step 8: Click on the **Finish** button.

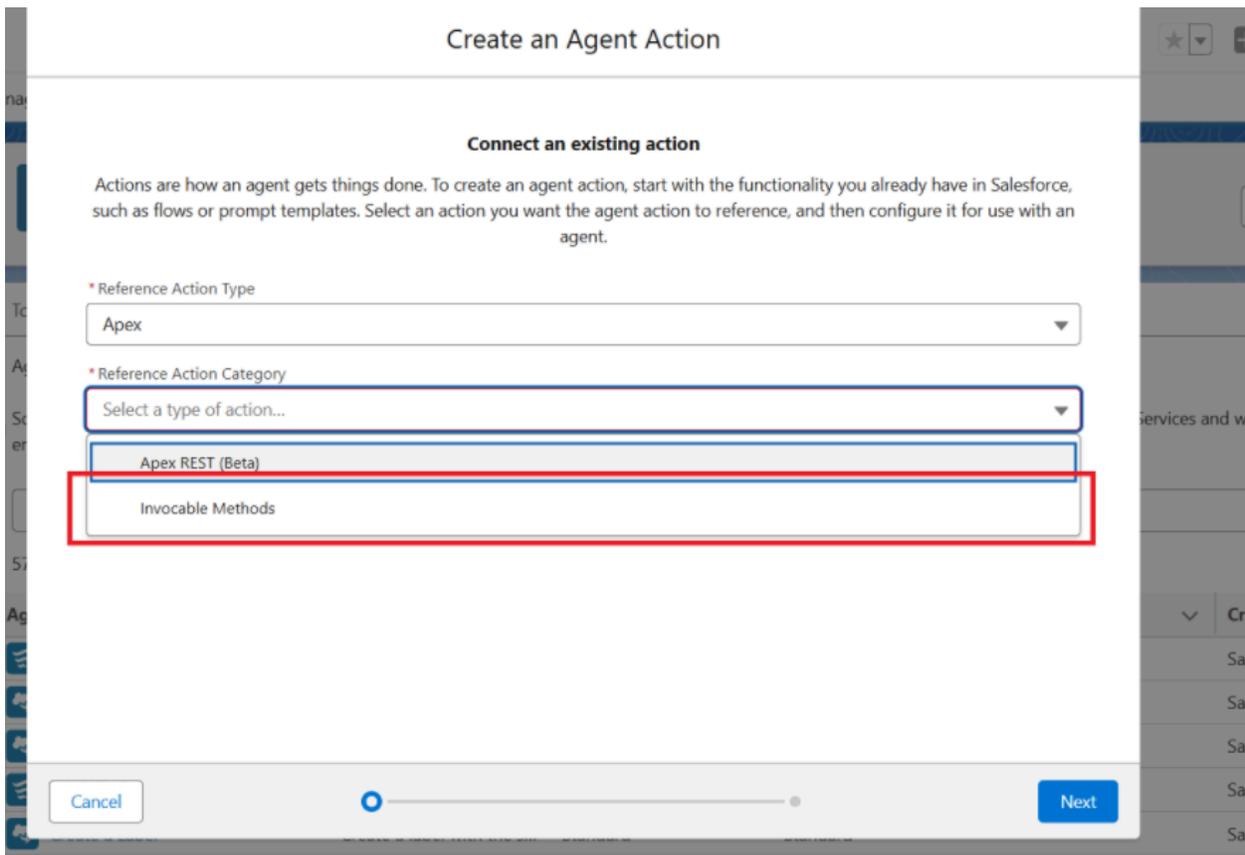
4. Log Work Hours

Step 1: Go to Setup => Agentforce Assets => New Agent Action.

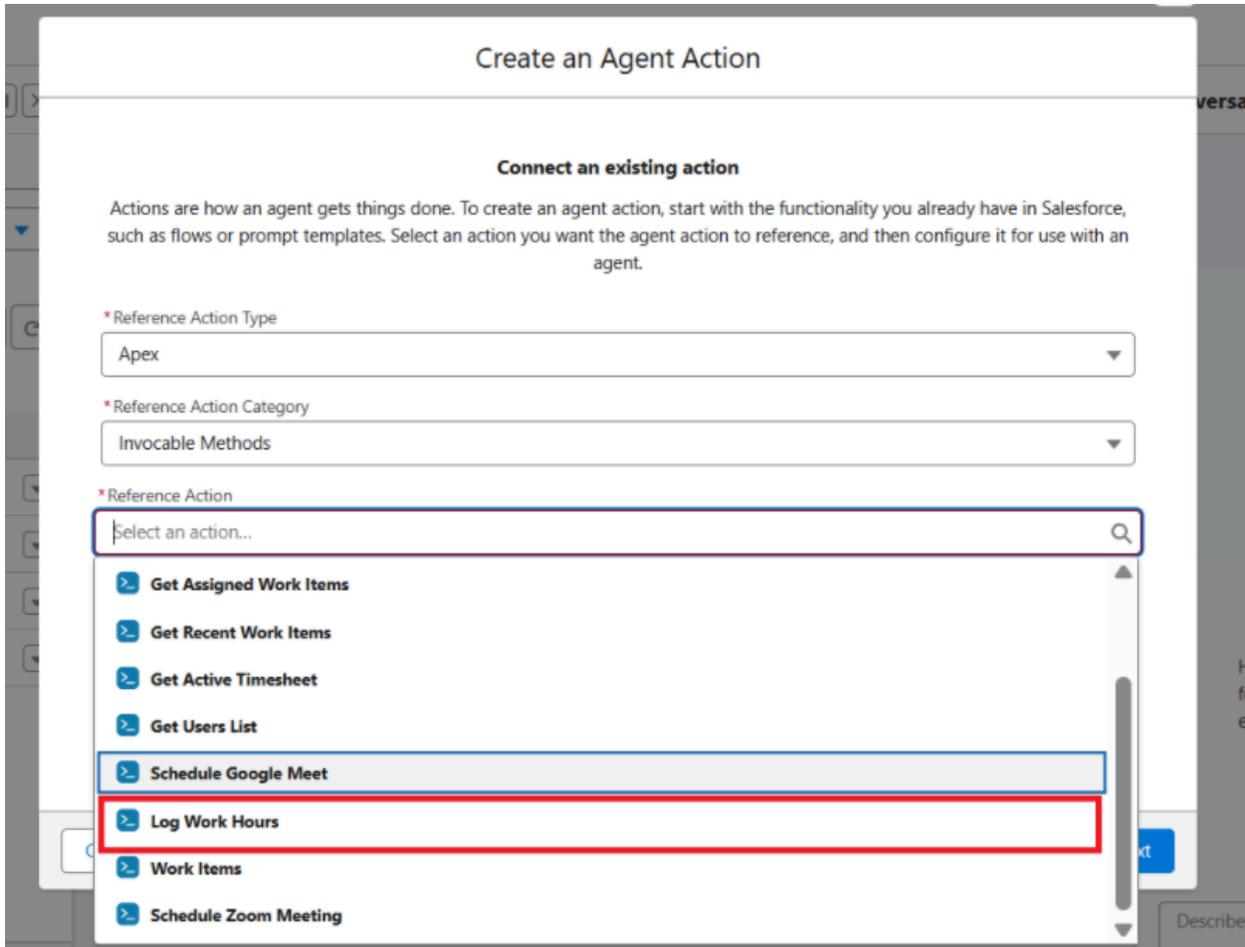
Step 2: Select 'Apex' from the **Reference Action Type** drop-down.



Step 3: Select 'Invocable Methods' from the Reference Action Category drop-down.



Step 4: Select 'Log Work Hours' from the Reference Action drop-down.



Step 5: Click on **Next**.

Step 6: Input and output fields are auto-populated from apex classes added. To all the inputs populated enable the **'Require input'**, **'Collect data from user'** checkboxes. and **'Show in conversation'** checkbox in output.

Create an Agent Action

*** Agent Action Instructions** ⓘ

Create timesheet entries for work items and return the records

Show loading text for this action ⓘ

*** Loading Text** ⓘ

Create Timesheet Entry Records.

Inputs

Billable to Client

billableToClient

*** Instructions** ⓘ

Is work billable to the client

Data Type

lightning__booleanType

Require input

Collect data from user

Output

output

output

*** Instructions** ⓘ

List of Timesheet Entry Record Created.

Data Type

lightning__listType

Filter from agent action

Show in conversation

Step 7: Add this text ‘List of Timesheet Entry Record Created..’ in the ‘Instructions’ field of the output Section.

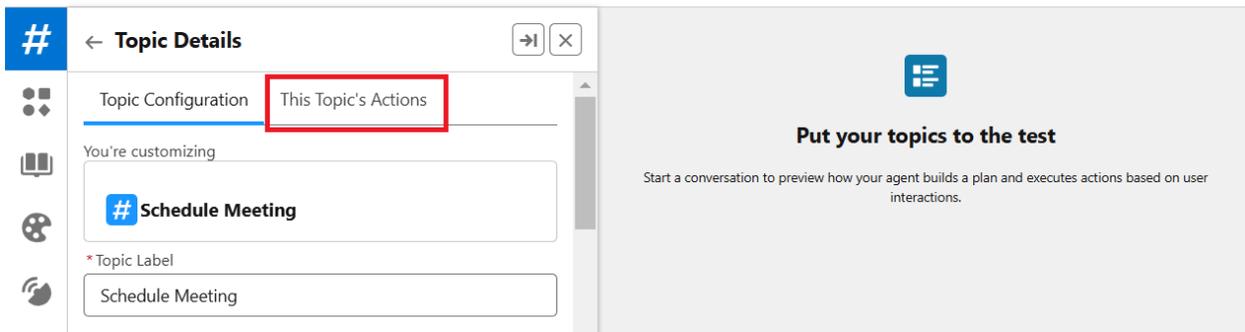
Step 8: Click on the **Finish** button.

Add Agent Actions to Agent

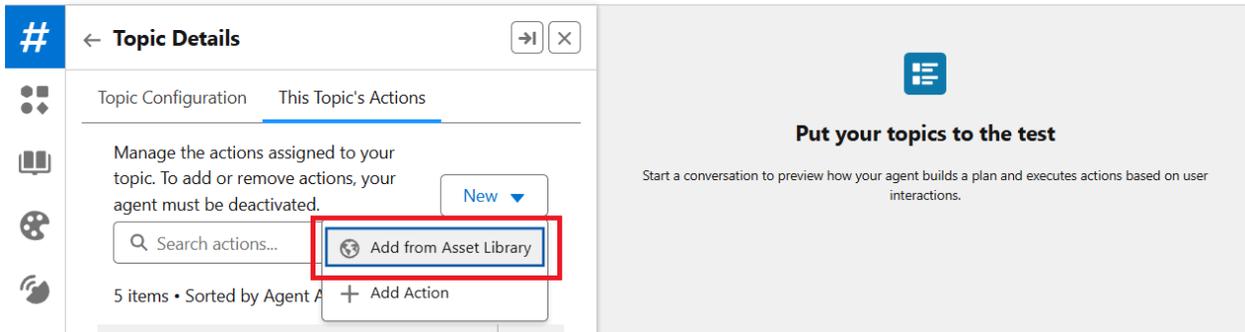
=====

Step 1: Go to Setup => Agentforce Agents => Einstein Copilot => Open in Builder => Log Hours

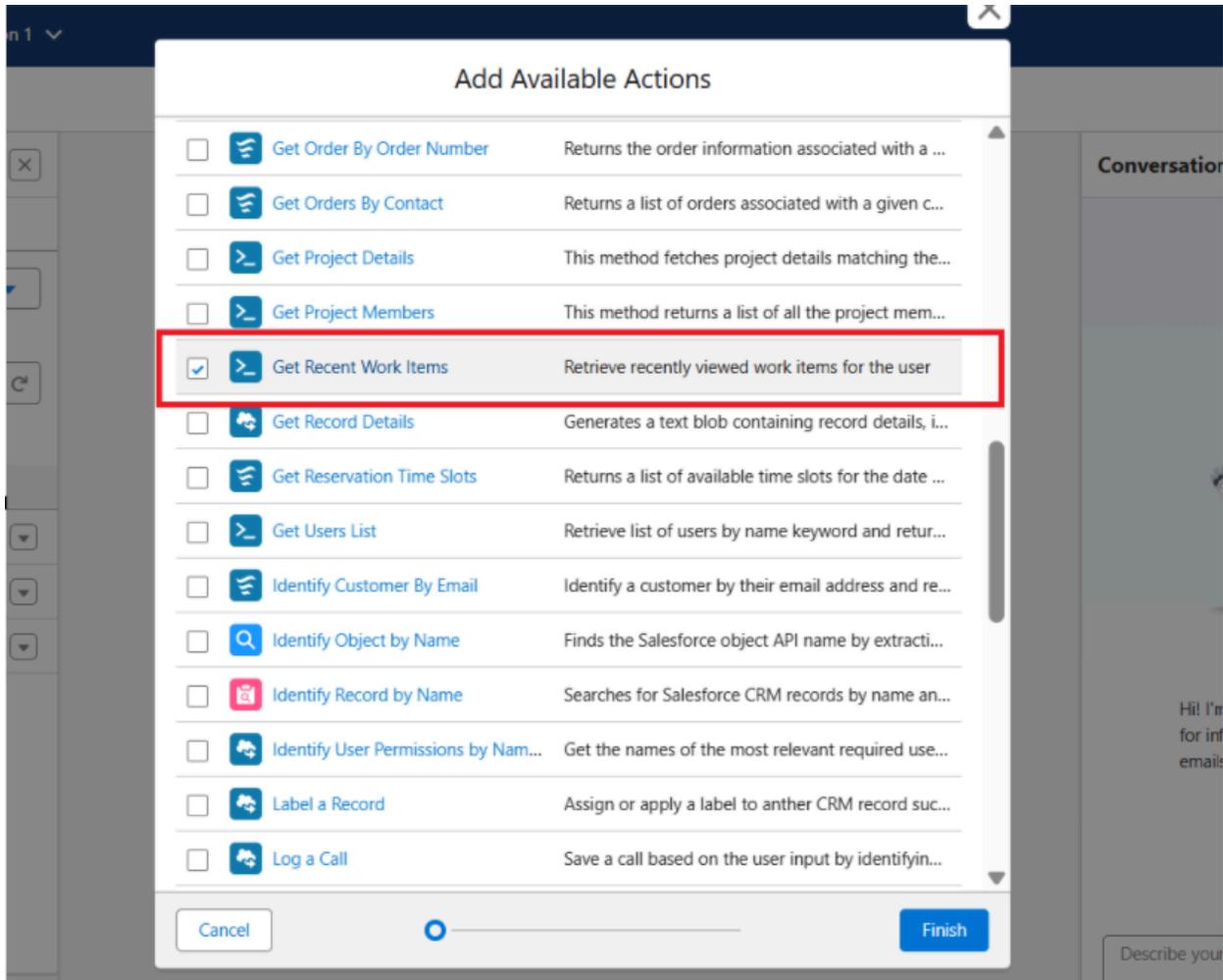
Step 2: Go to ‘This Topic’s Actions’.



Step 3: Click on the 'Add from Asset Library' button in the New button drop-down.

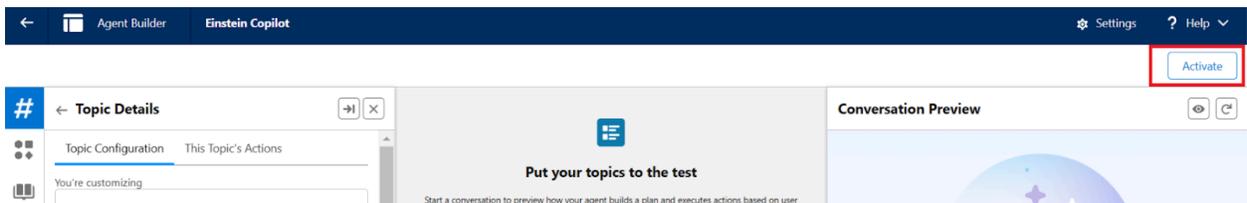


Step 4: Select the 'Get Recent Work Items' created in agent actions from the library.



Step 5: Click 'Finish'. Repeat till Step 4 to add the topic 'Get Assigned Work Items', 'Get Active Timesheet', 'Log Work Hours' from the library to the agent.

Step 6: Activate the agent by clicking on the **Activate** button.



Step 7: Now our agent is ready to log hours as per user inputs.

Deactivate

Topic Details

← Topic Details

Topic Configuration This Topic's Actions

You're customizing

Log Hours

* Name
Log Hours

* API Name
Log_Hours

* Classification Description ⓘ
This topic will be used to log hours for Jpetto WorkItems.

* Scope ⓘ
Your job is to assist user to log hours.

Instructions ⓘ

The following instructions are used to run this topic.

* Instruction ⓘ
If the email provided by the user does not match, prompt them to enter the correct email.

Put your topics to the test

Start a conversation to preview how your agent builds a plan and executes actions based on user interactions.

Conversation Preview



Let's chat!

Hi! I'm Einstein, an AI assistant. I can do things like search for information, summarize records, and draft and revise emails. What can I help you with?

Describe your task or ask a question...