Jpetto Project Manager - Agentforce Suite

User Guide Part-2

Log Hours using Einstein Copilot



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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.
- 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
- Timesheet Entry record is created and returns the record ID on the screen.
 For Assigned Work Items:
- 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.

Setup	Home	Object N	Manager 🗸	
Q generative			SETUP Einstein Setup	
✓ Einstein				
✓ Einstein Generat	tive Al		Turn on Finstein	
✓ Agent Studio			Enhance your Salesforce data with generative AI to create relevant, customized experiences for your users. Learn more in help.	On
Agent Acti	ions			
Agents				

Enable Agents:

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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).

Agentforce Help your employees accomplish key business tasks with a conversational AI assistant for Salesforce CRM.									Or	*	
Give Users Access to th	ne Agentforce	e (Default) A	Agent						Assign Permissic	on Set (Groups
Agent Name	~	Туре	~	Description	~	Active	Created	3y ~	Last Modified	\sim	
Einstein Copilot		Employee		An Al assistan	for i				Jan 16, 2025		

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

SETUP > AGENT DETAIL Einstein Copil	s ot	MH SMART DISTACT	Open in Buil
API Name	Туре	Active	
Copilot_for_Salesforce	Employee		
Details Actions System	Messages Language S	ttings (Beta)	

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.

←	Agent Builder Einstein Copilot			🔅 Settings	
#	Topics	×		Conversation Preview	
* H * *	Manage the topics assigned to your agent. To make changes, your agent must be	New	Put your topics to the test		
	deactivated.	🚱 Add from Asset Library			
8	Q Search topics	+ New Topic			
-	3 items • Sorted by Topic Label(asc)		-		

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.

Object N	lanager 🗸	
	SETUP > AGENT STUDIO Agent Actions	+ New Agent Action
	Actions	
	Agents use actions to get things done intelligently and securely. These actions are configured and available to assign to a topic.	
_	Some Agent scheme are in hots and have limited functionality, as further described in the Decumentation. Including them in an agent is part of the Services	and will concurso Finetoin Roquests

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

	Create an Agent Action	* 🖬 🚓 ? 🛪
Object Mar		
	Connect an existing action	1938-71 (- 7777-7338-17) 1
11	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.	+ New Agent
	* Reference Action Type	
-	A Select a type of action	
	A Apex	
	St Flow	Services and will consume Eins
	Prompt Template	
ers	4	
g for?		✓ Created By
		Salesforce
)	Salesforce
		Salesforce
		Salesforce
	Cancel O Next	Salesforce
	Create Case Let a customer create a Standard Flow	Salesforce

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

	Create an Agent Action		*	E
na; 201	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			
Тс	Apex 🔹			
A:	* Reference Action Category Select a type of action		Services ar	nd w
er	Apex REST (Beta)			
	Invocable Methods	1		
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	Cancel O	d		Sa
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Step 6: Select 'Get Recent Work Items' from the Reference Action drop-down.

Version 1 🗸	<u> </u>
Create an Agent Action	
Connect an existing action	on Preview
Actions are how an agent gets things done. To create an agent action, start with the functionality you already have in Salest such as flows or prompt templates. Select an action you want the agent action to reference, and then configure it for use wi agent.	force, ith an
* Reference Action Type	
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* Reference Action	
Select an action	Q
E Get Google Meet Meeting IDs for Organizer	
E Get Project Details	
Get Project Members	'm Einstein, an
	nformation, su ils What can I
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E Get Recent Work Items	
E Get Active Timesheet	
🛛 🔄 🔁 Get Users List	ct
Schedule Google Meet	v yv ur task or ask a
	Version 1 ✓ 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 Saled's such as flows or prompt templates. Select an action you want the agent action to reference, and then configure it for use w agent. * Reference Action Type Apex * Reference Action Type Apex * Reference Action Category Invocable Methods * Reference Action Belect an action Set Google Meet Meeting IDs for Organizer Set Get Project Details Get Active Timesheet Set Organizer Set Active Timesheet Set Users List Schedule Google Meet

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.

Show loading text for this action	
*Loading Text 1	
Retrieving the recently viewed item for the user.	
Input	Output
User Email	output
userEmail	output
*Instructions ()	*Instructions ()
User email to retrieve recently viewed work items for.	Name and Title of the work item.
Data lype	Data lype
Require input	Filter from agent action
Collect data from user	Show in conversation
	Output Rendering

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.

				Create	e an Agent	t Action				(*•	8	a 1	? \$	
Object Mar		Actions are how such as flows or p	an agent gets things prompt templates. So	Conne done. To create a elect an action you	ect an existing n agent action, : u want the agent agent.	g action start with the it action to ref	functionality you erence, and then	already have in configure it for	Salesforce, use with an			+	New	Agent	
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		Gard										Greated Galesford Galesford Galesford	By e e e		
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Step 3: Select 'Invocable Methods' from the Reference Action Category drop-down.

		Create an Agent Action		*	E
na;		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.			(
Te		* Reference Action Type			
		Apex 🔹			
Aç Sc		* Reference Action Category Select a type of action		ervices ar	nd w
er		Apex REST (Beta)			
		Invocable Methods			
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1 <u>1</u>	C	Cancel O Next			Sa
			_		Sa



Step 4: Select 'Get Assigned Work Items' 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.

Retrieve recent assigned work items for the user		
Show loading text for this action 🚯		
*Loading Text		
Retrieve assigned work items for the user		
Input	Output	
User Email	output	
userEmail	output	
*Instructions (* Instructions 1	
User email to retrieve assigned work items for.	Assigned work item	
Data Type	Data Type	
lightning_textType	lightning_listType	
Require input	Filter from agent action	
 Collect data from user 	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.

		Create a	an Agent Action			*) 8 4	2 ? X
Object Mana	Actions are how a such as flows or p	Connect in agent gets things done. To create an a rompt templates. Select an action you wa	an existing action gent action, start with the ant the agent action to ref agent.	functionality you already hi erence, and then configure	ave in Salesforce, it for use with an		+	New Agent
A	* Reference Action T Select a type of a Apex	ype action			•			
Sc if	Flow Prompt Tem	plate				Services	and will co	onsume Eins
3 for?						~	Created I	By
							Salesforce Salesforce	e
	Cancel	C	Standard	● Flow	Next		Salesforce Salesforce Salesforce	e e

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

Creat	te an Agent Action	*
Actions are how an agent gets things done. To create a such as flows or prompt templates. Select an action yo	nect an existing action an agent action, start with the functionality you already have in Salesforce, ou want the agent action to reference, and then configure it for use with an	
* Reference Action Type Tc Apex	agent.	
A: *Reference Action Category Sc Select a type of action	~	Services and w
er Apex REST (Beta) Invocable Methods]
57 Ag		- Cr
		Sa
Cancel		xt Sa
State		Si

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

			-1
	Create an Agent Action		
			versa
	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	è,	
	such as flows or prompt templates. Select an action you want the agent action to reference, and then configure it for use with a agent.	n	
Ce	*Reference Action Type	_	
	Apex	r	
	* Reference Action Category	_	
	Invocable Methods	r	
	* Reference Action		
5	Select an action C	2	
6	Set Assigned Work Items		
	Set Recent Work Items		
<u> </u>	S Get Active Timesheet		H
	🔁 Get Users List		e
	Schedule Google Meet		
	2 Log Work Hours		
	2 Work Items	xt	
	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.

*Agent Action Instructions 🚯		
Retrieve active timesheet IDs for the provided user ema	nails	
Show loading text for this action 1		
Retrieves the Active Timesheet for the given user.		
Input	Output	
User Email	output	
userEmail	output	
*Instructions ()	Instructions	
User email to retrieve the active timesheet for.	Returns the Timesheet ID.	
Data Type	Data Type	
lightning_textType	lightning_listType	
Require input	Filter from agent action	
 Collect data from user 	Show in conversation	

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.

		Create a	an Agent Action			*) 8 4	2 ? X
Object Mana	Actions are how a such as flows or p	Connect in agent gets things done. To create an a rompt templates. Select an action you wa	an existing action gent action, start with the ant the agent action to ref agent.	functionality you already hi erence, and then configure	ave in Salesforce, it for use with an		+	New Agent
A	* Reference Action T Select a type of a Apex	ype action			•			
Sc if	Flow Prompt Tem	plate				Services	and will co	onsume Eins
3 for?						~	Created I	By
							Salesforce Salesforce	e
	Cancel	C	Standard	● Flow	Next		Salesforce Salesforce Salesforce	e e

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

Creat	te an Agent Action	*
Actions are how an agent gets things done. To create a such as flows or prompt templates. Select an action yo	nect an existing action an agent action, start with the functionality you already have in Salesforce, ou want the agent action to reference, and then configure it for use with an	
* Reference Action Type Tc Apex	agent.	
A: *Reference Action Category Sc Select a type of action	~	Services and w
er Apex REST (Beta) Invocable Methods]
57 Ag		- Cr
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Cancel		Sa xt Sa
State		Si

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

Create an Agent Action	
2	ver
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 Sa such as flows or prompt templates. Select an action you want the agent action to reference, and then configure it for use agent.	alesforce, with an
* Reference Action Type	
Apex	•
* Reference Action Category	
Invocable Methods	•
* Reference Action	
Select an action	Q
Get Assigned Work Items	•
E Get Recent Work Items	
E Get Active Timesheet	
E Get Users List	
Schedule Google Meet	
2 Log Work Hours	
2 Work Items	
Schedule Zoom Meeting	Descri

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 record	ds				
Show loading text for this action					
Create Timesheet Entry Records.					
Inputs	Output				
Billable to Client	output				
billableToClient	output				
*Instructions 🚯	*Instructions (
Is work billable to the client	List of Timesheet Entry Record Created.				
Data Type	Data Type				
lightning_booleanType	lightning_listType				
Require input Collect data from user	Filter from agent action				

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'.

÷	Agent Builder Einstein Copilot	
#	← Topic Details	
• =	Topic Configuration This Topic's Actions	
	You're customizing	Put your topics to the test
8	# Schedule Meeting	Start a conversation to preview how your agent builds a plan and executes actions based on user interactions.
	* Topic Label	
C)	Schedule Meeting	

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

÷	Agent Builder	Einstein Copilot	
#	← Topic Details	→I ×	
•=	Topic Configuration	his Topic's Actions	
	Manage the actions ass topic. To add or remove	signed to your e actions, your	Start a conversation to preview how your agent builds a plan and executes actions based on user interactions.
8	agent must be deactiva	Add from Asset Library	
C)	5 items • Sorted by Age	ent A + Add Action	

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.

÷	Agent Builder Einstein Copilot				🕸 Settings	? Help ~
						Activate
#	← Topic Details	×	-	Conversation Preview		• C
0 H 0 +	Topic Configuration This Topic's Actions	^	E			
	You're customizing		Put your topics to the test Start a conversation to preview how your agent builds a plan and executes actions based on user			
ЩШ.				+		

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

