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.
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:

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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

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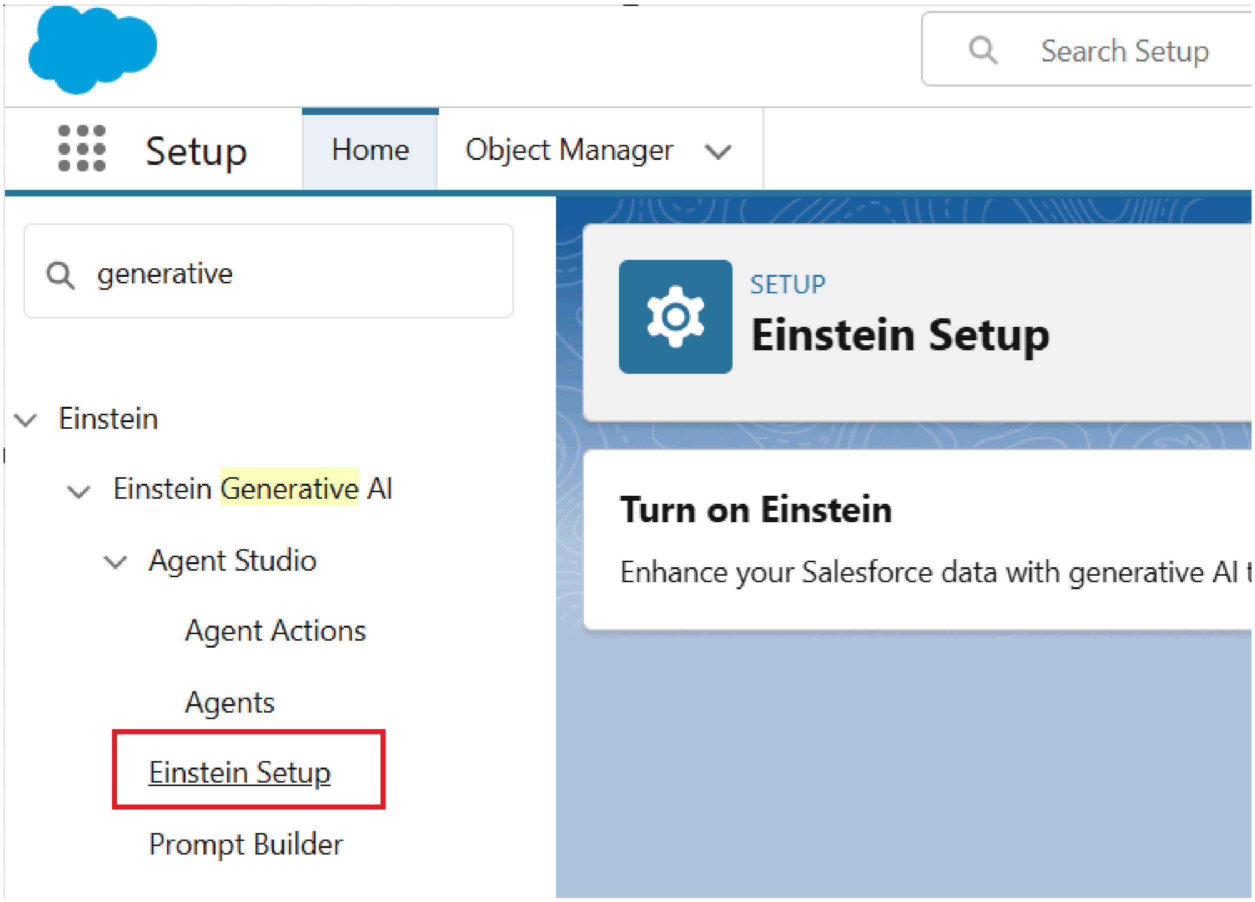
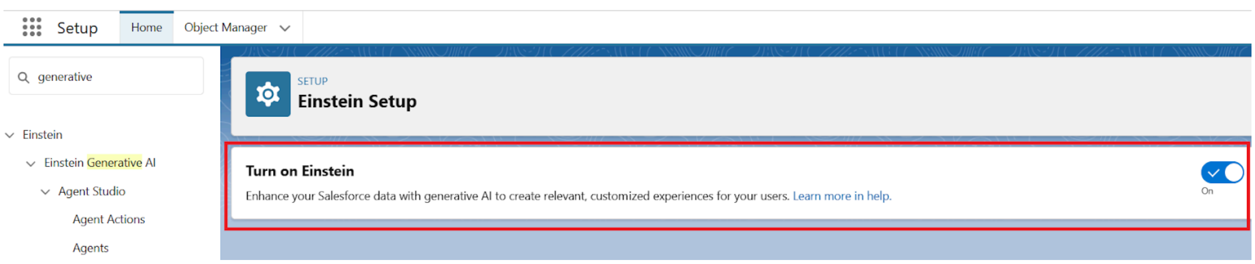
Step 1: Open the Setup Menu and click Setup.

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:

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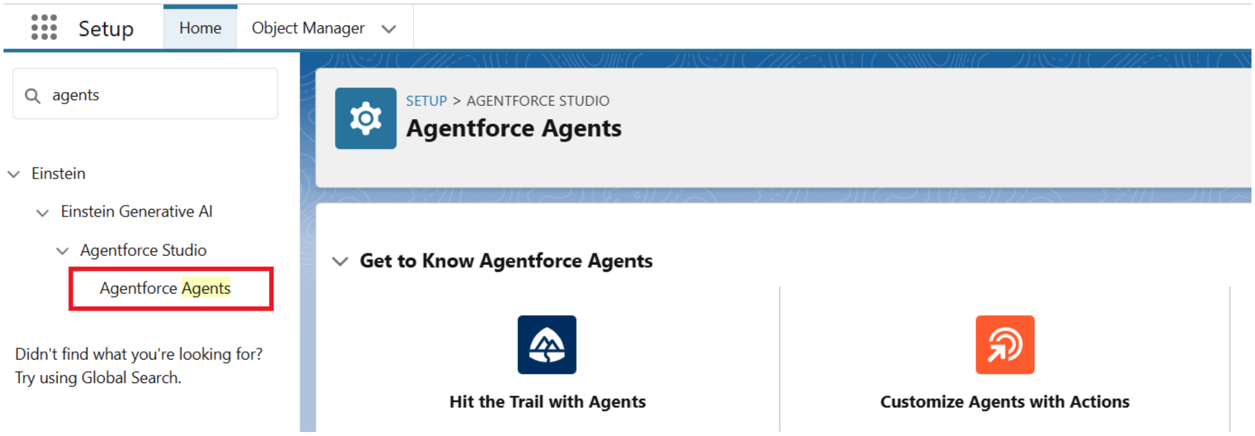
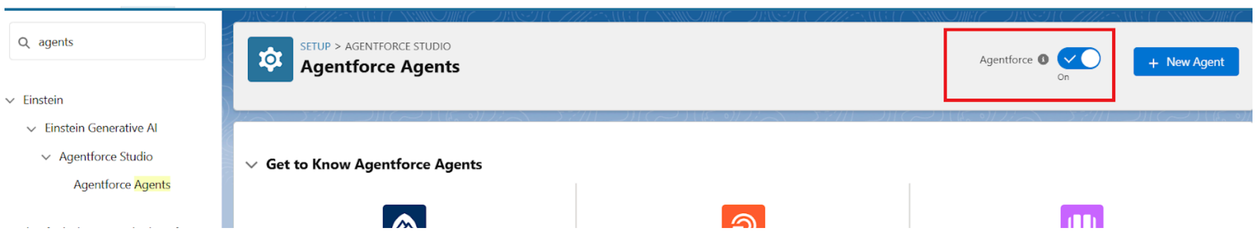
Step 4: Click Setup.

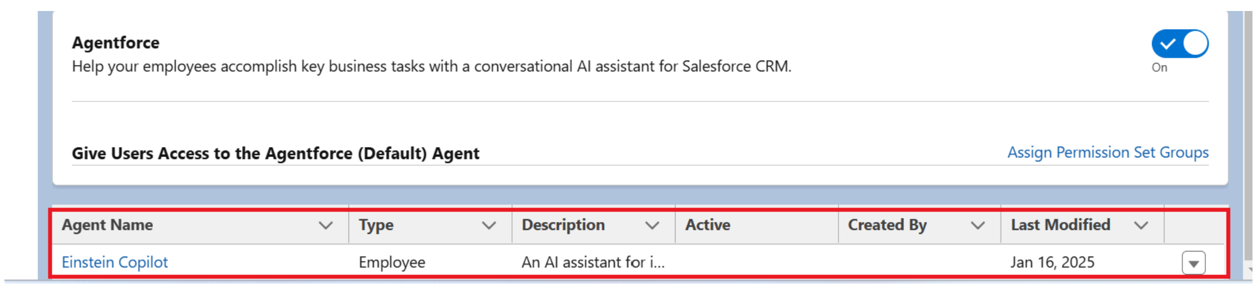
Step 5: In the quick find, search for Agents and click on **Agentforce Agents** (under Agentforce Studio).



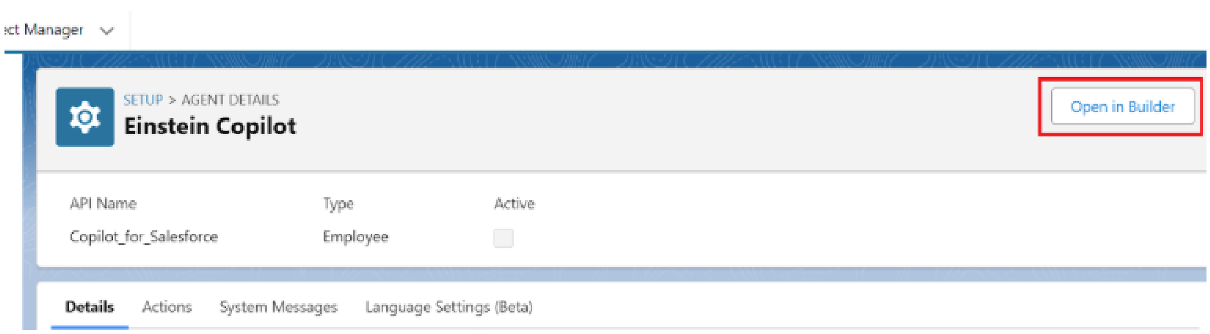
Step 6: Turn on the **Agentforce** toggle.



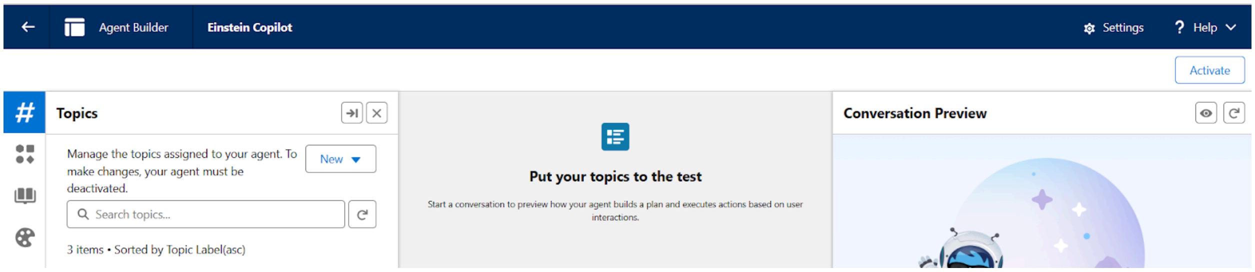
Step 7: Refresh the page, In the list of agents (at the bottom of the screen), click **Einstein Copilot** (it's the only item in the list).

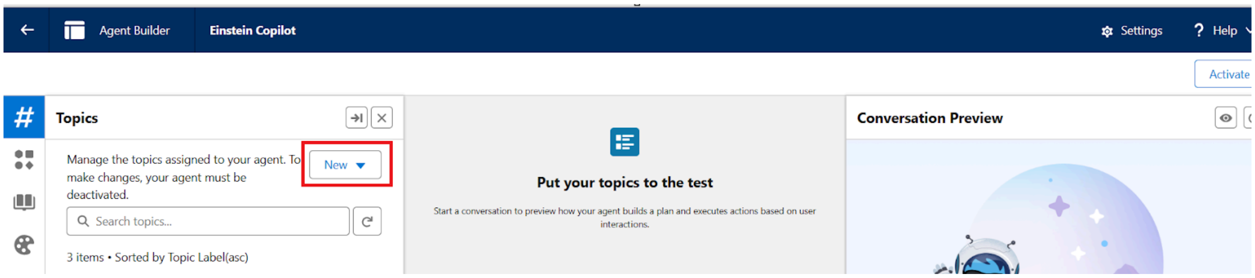


Step 8: Click **Open in Builder** (upper right corner).

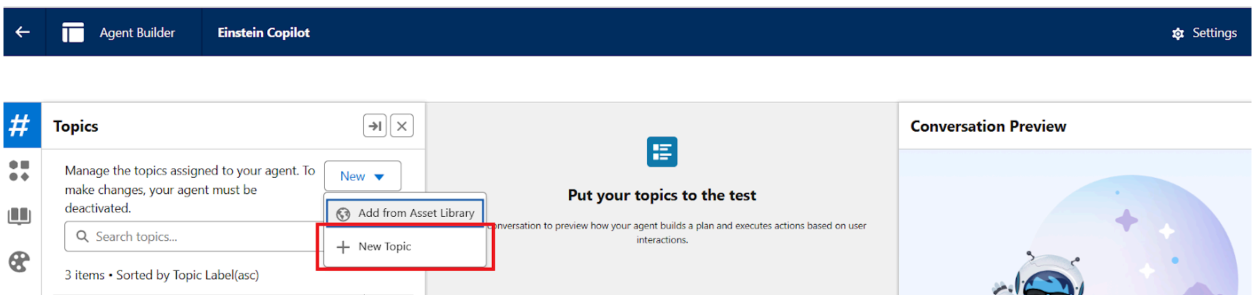


Step 9: You'll be redirected to the topics page as shown in the below screenshot. In that click on the New button to create a new topic for our use case (Log Hours).





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

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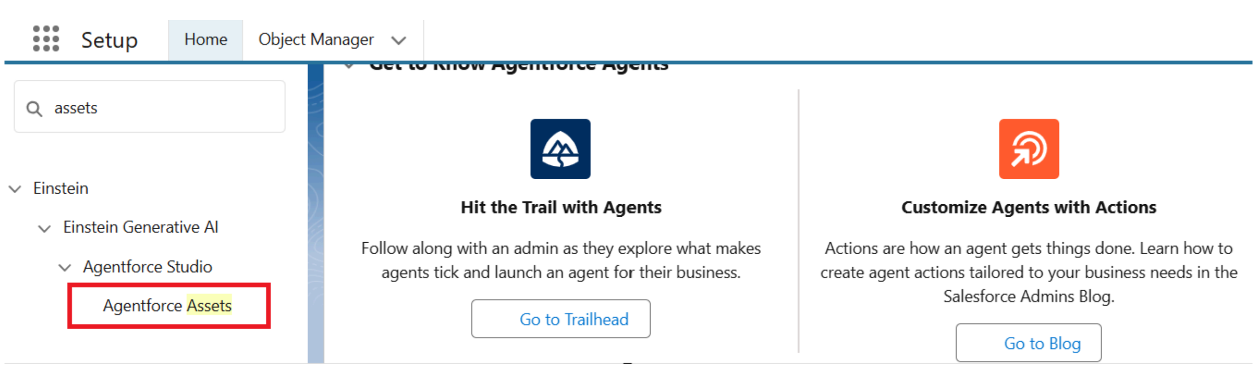
For Log Hours we have to create 4 agent actions as outlined below:

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

1. Get Recent Work Items

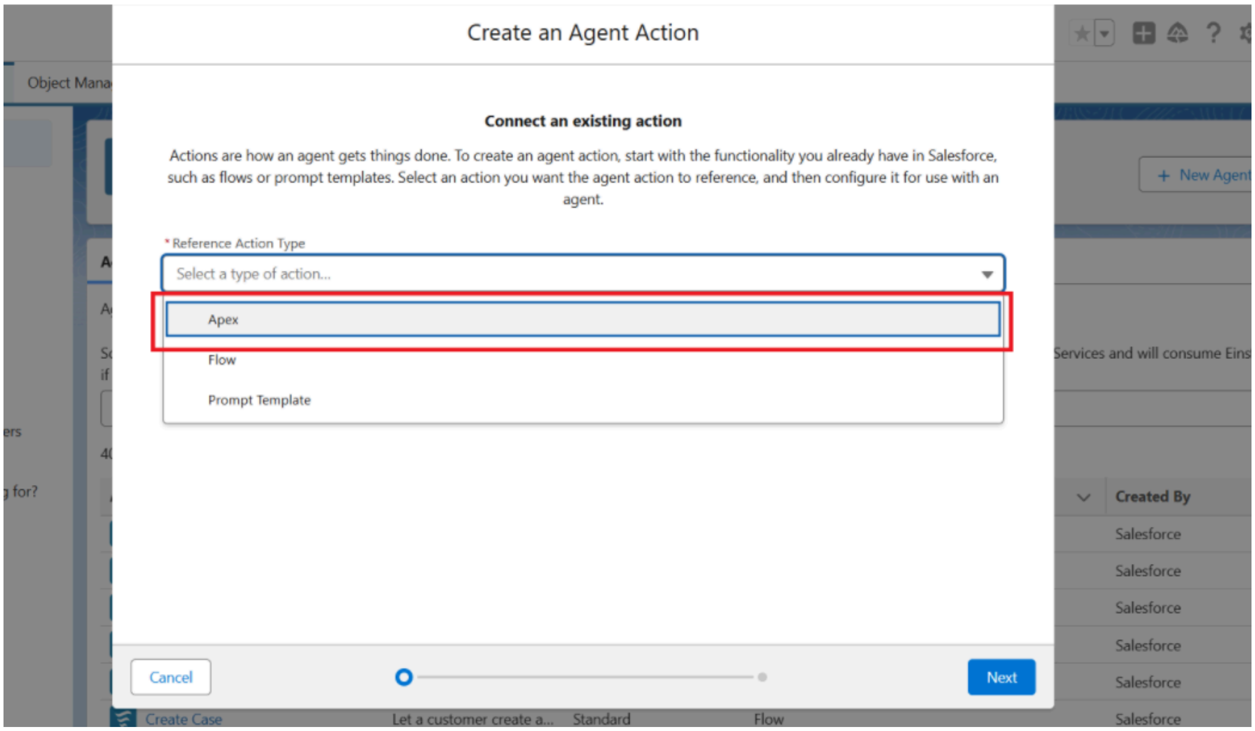
Step 1: Click Setup.

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

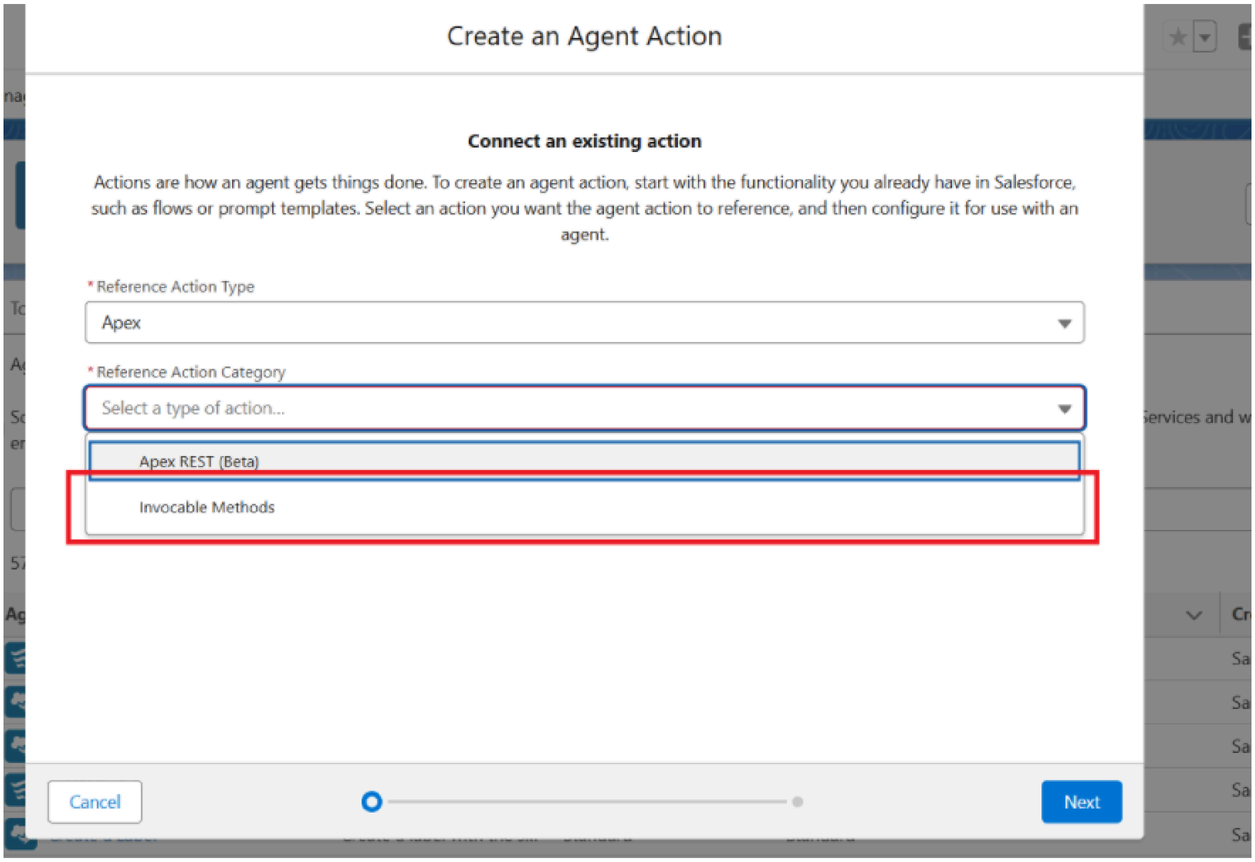


Step 3: Switch to the **Actions** tab and click on the **New Agent Action** button.

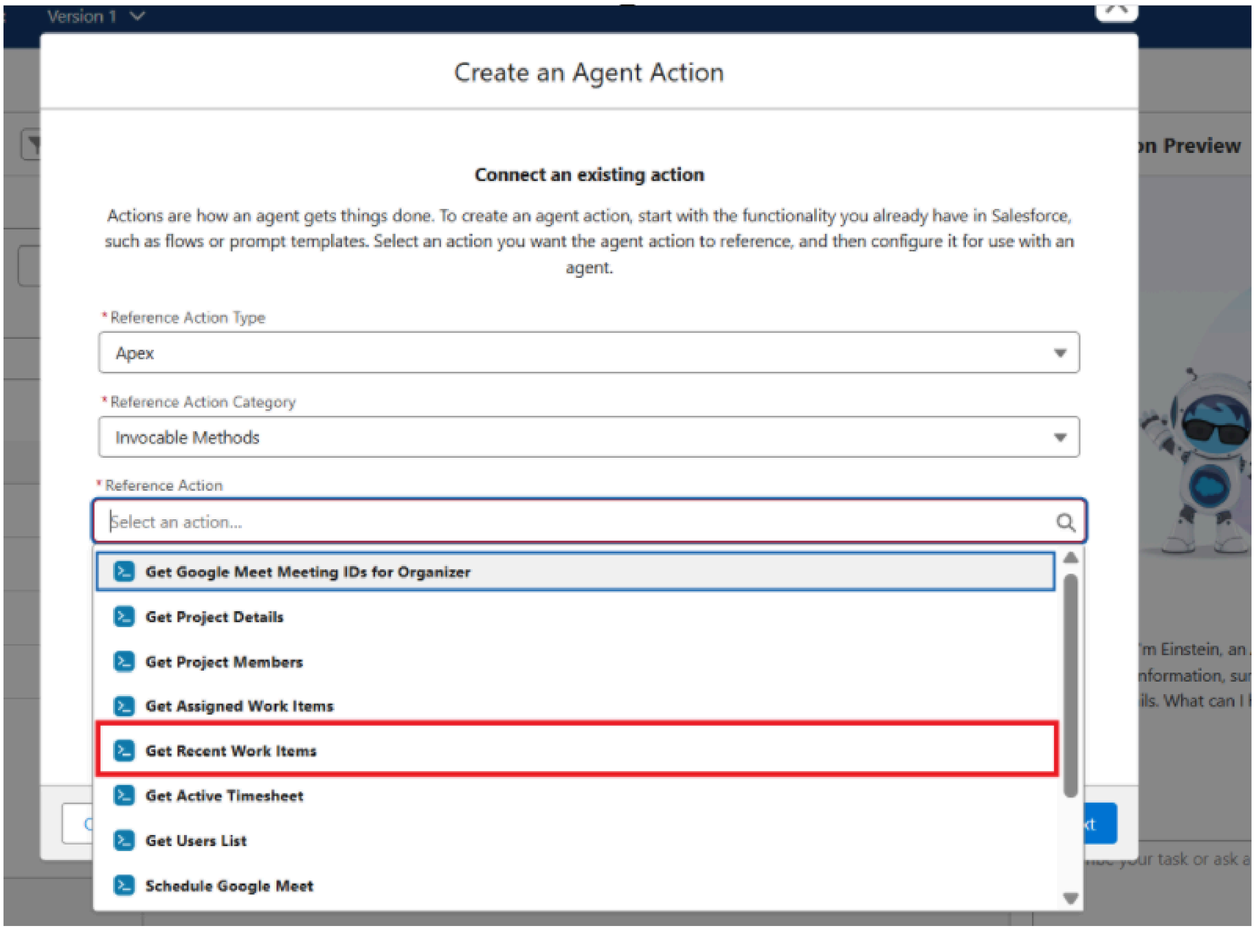
Step 4: Select **‘Apex’** from the **Reference Action Type** drop-down.



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

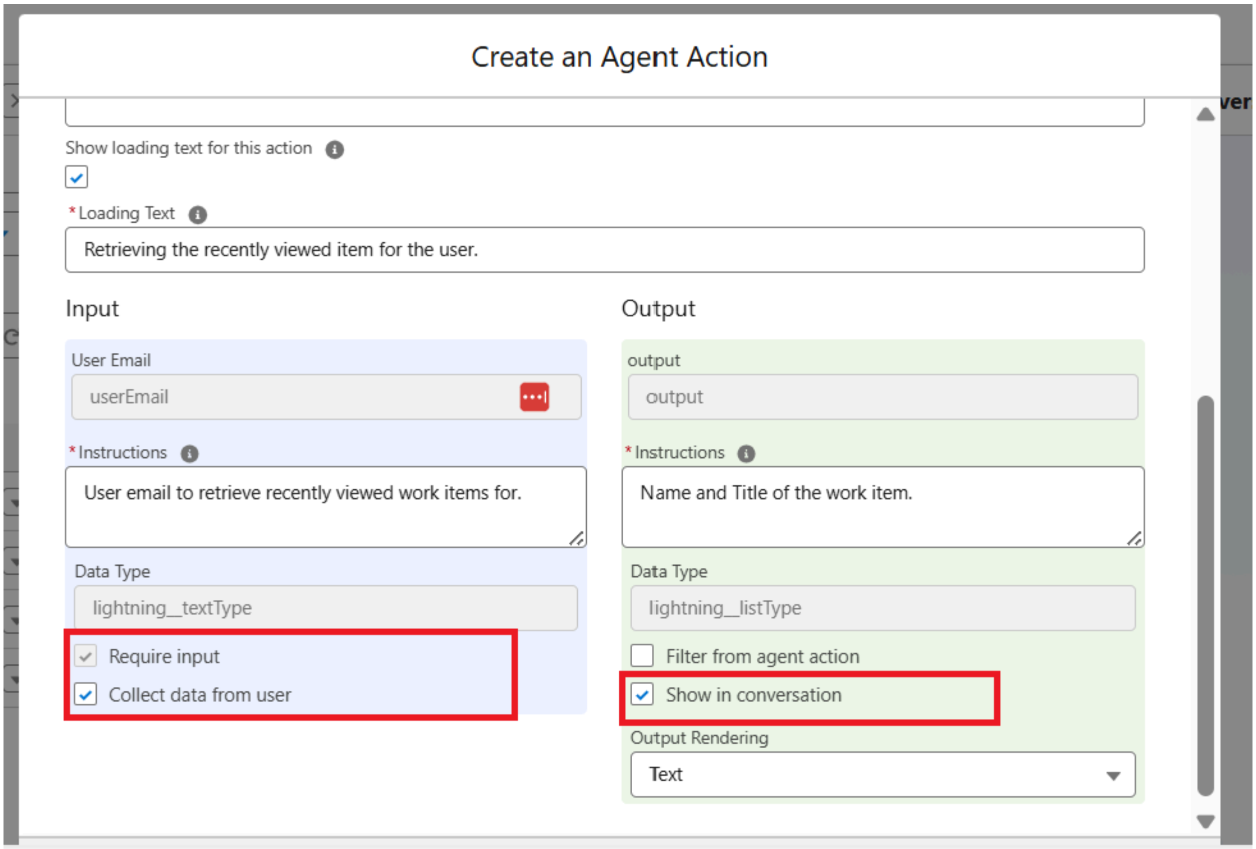


Step 6: Select **‘Get Recent Work Items’** from the **Reference Action** drop-down.



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.



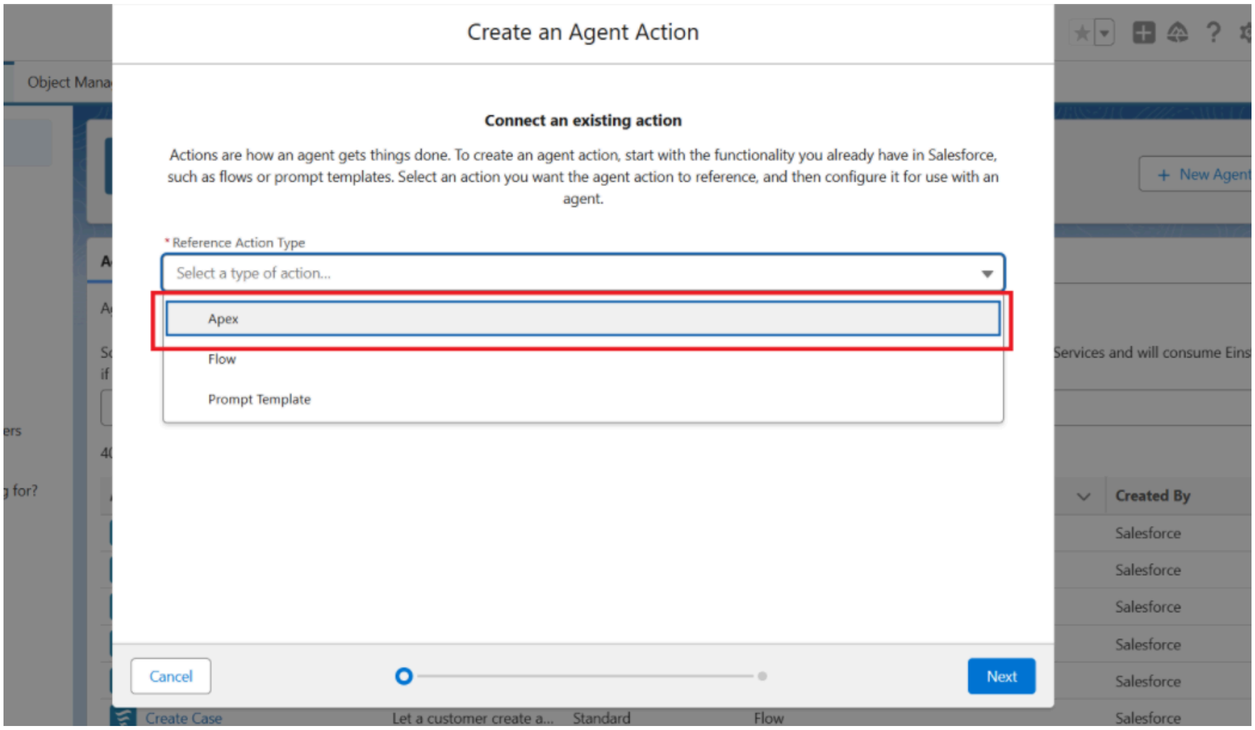
Step 9: Add this text **'Name and Title of the work item.'** in the **'Instructions'** field of the output Section.

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

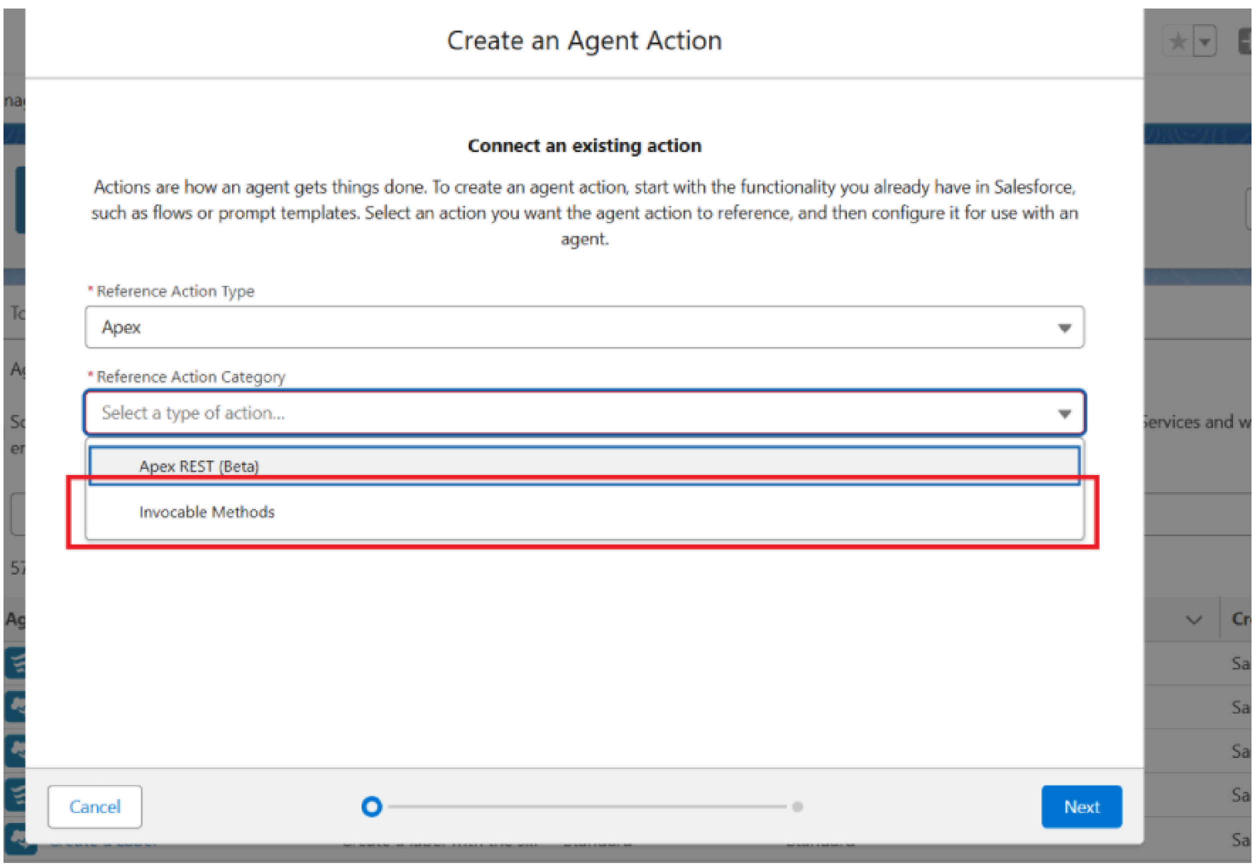
2. Get Assigned Work Items

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

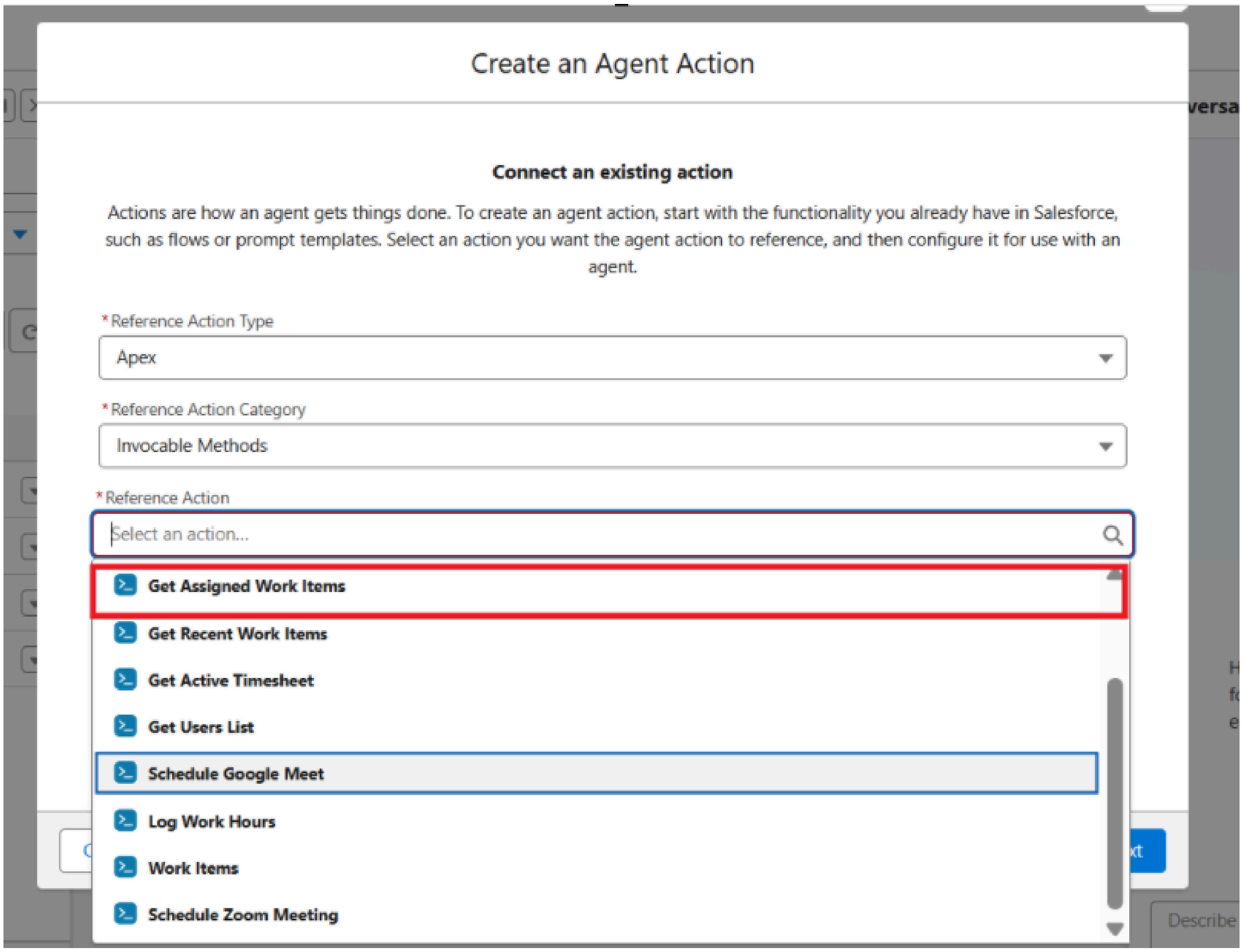
Step 2: Select **'Apex'** from the **Reference Action Type** drop-down.



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

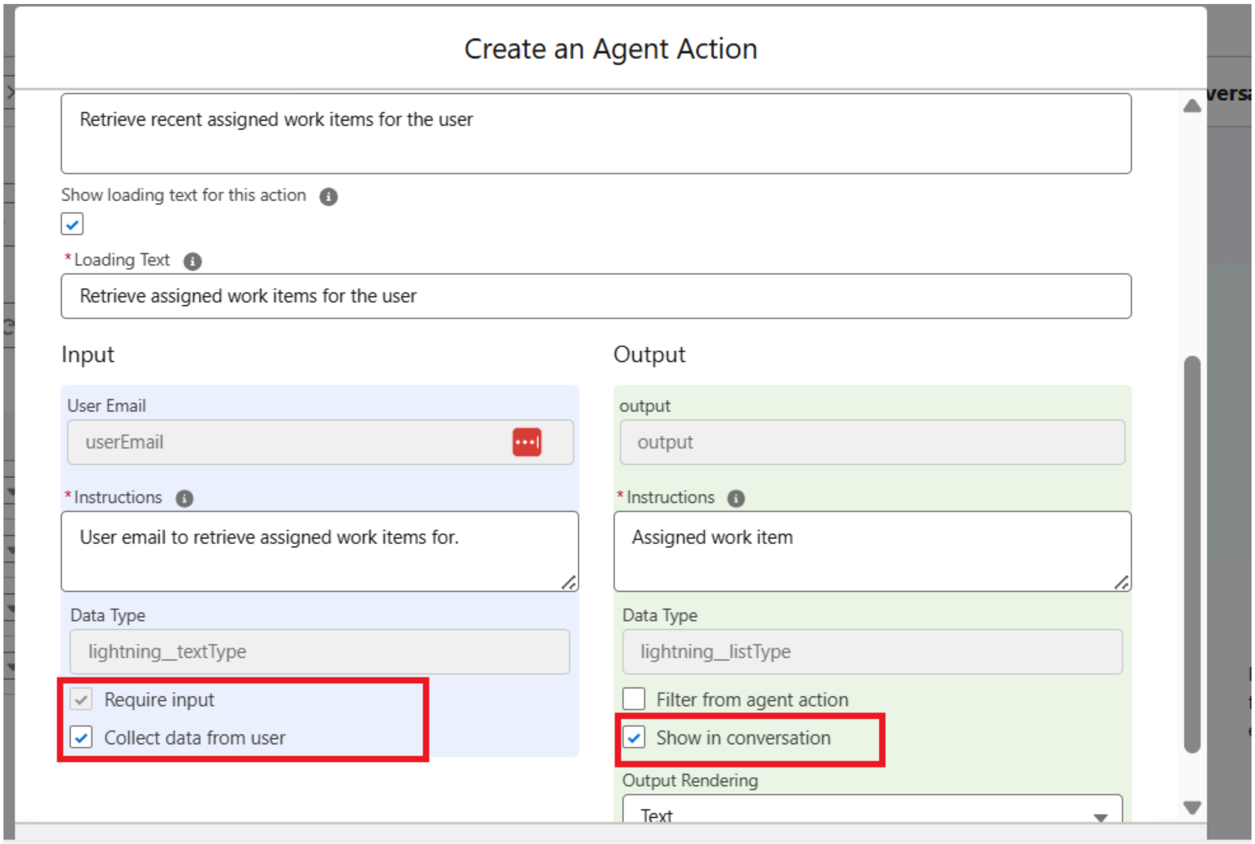


Step 4: Select **'Get Assigned Work Items'** from the **Reference Action** drop-down.



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.



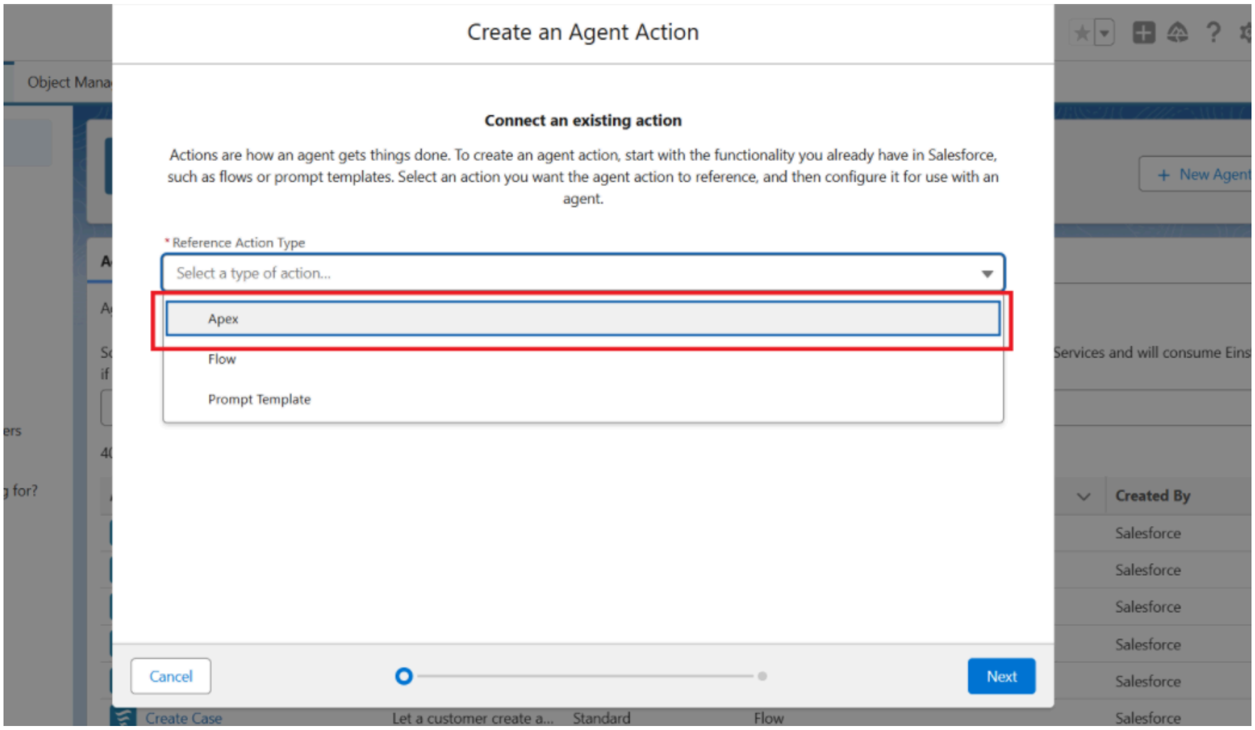
Step 7: Add this text **'Assigned work item'** in the **'Instructions'** field of the output Section.

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

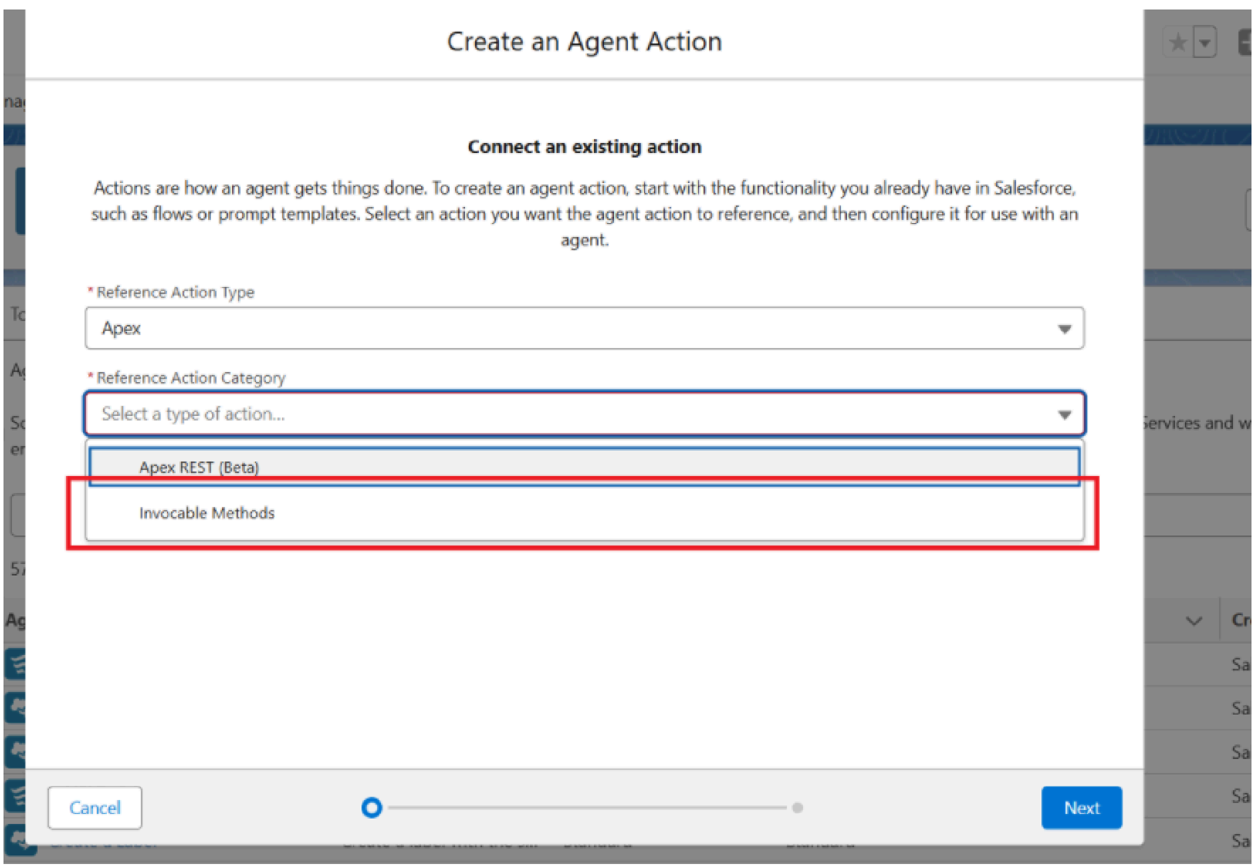
3. Get Active Timesheet

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

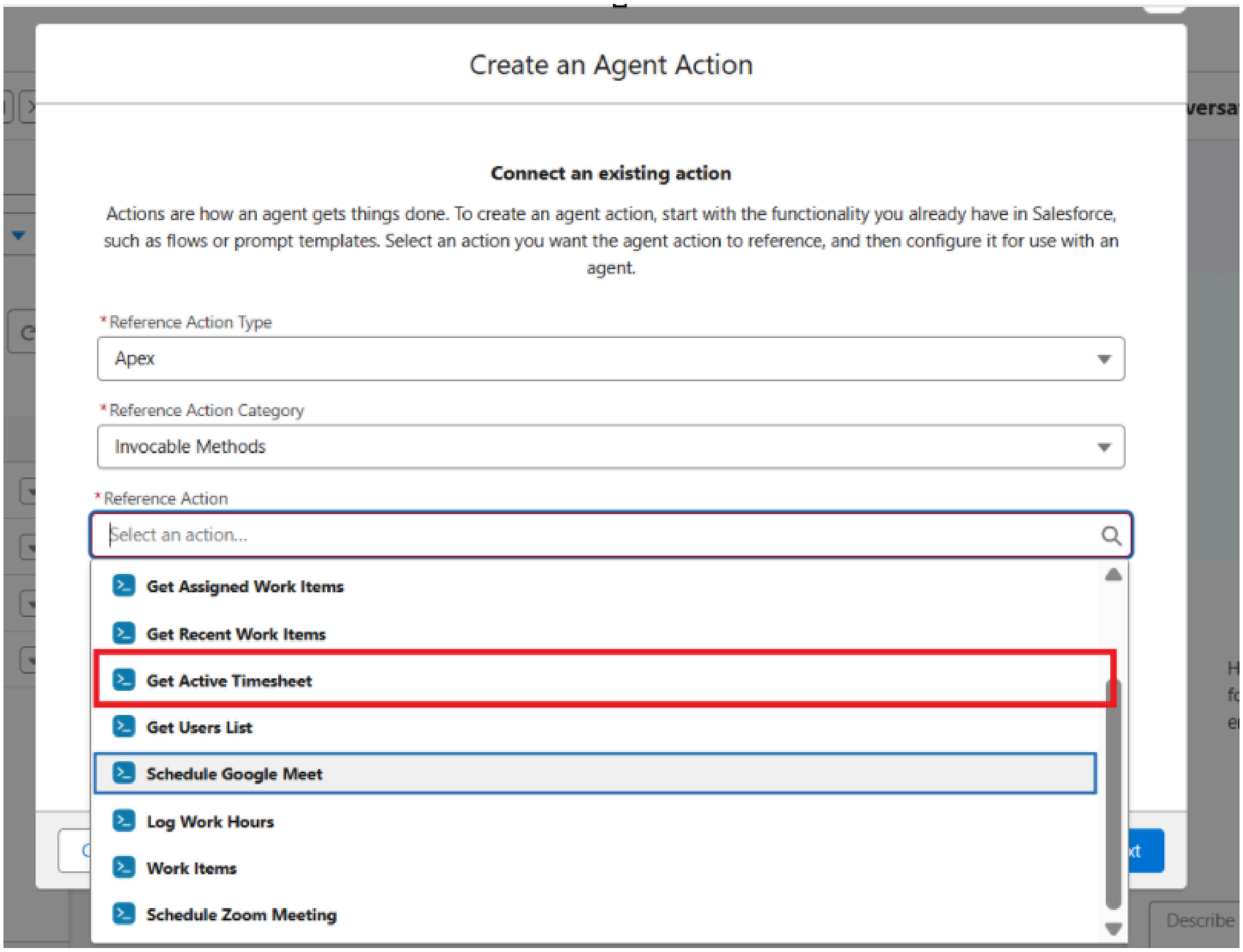
Step 2: Select **'Apex'** from the **Reference Action Type** drop-down.



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

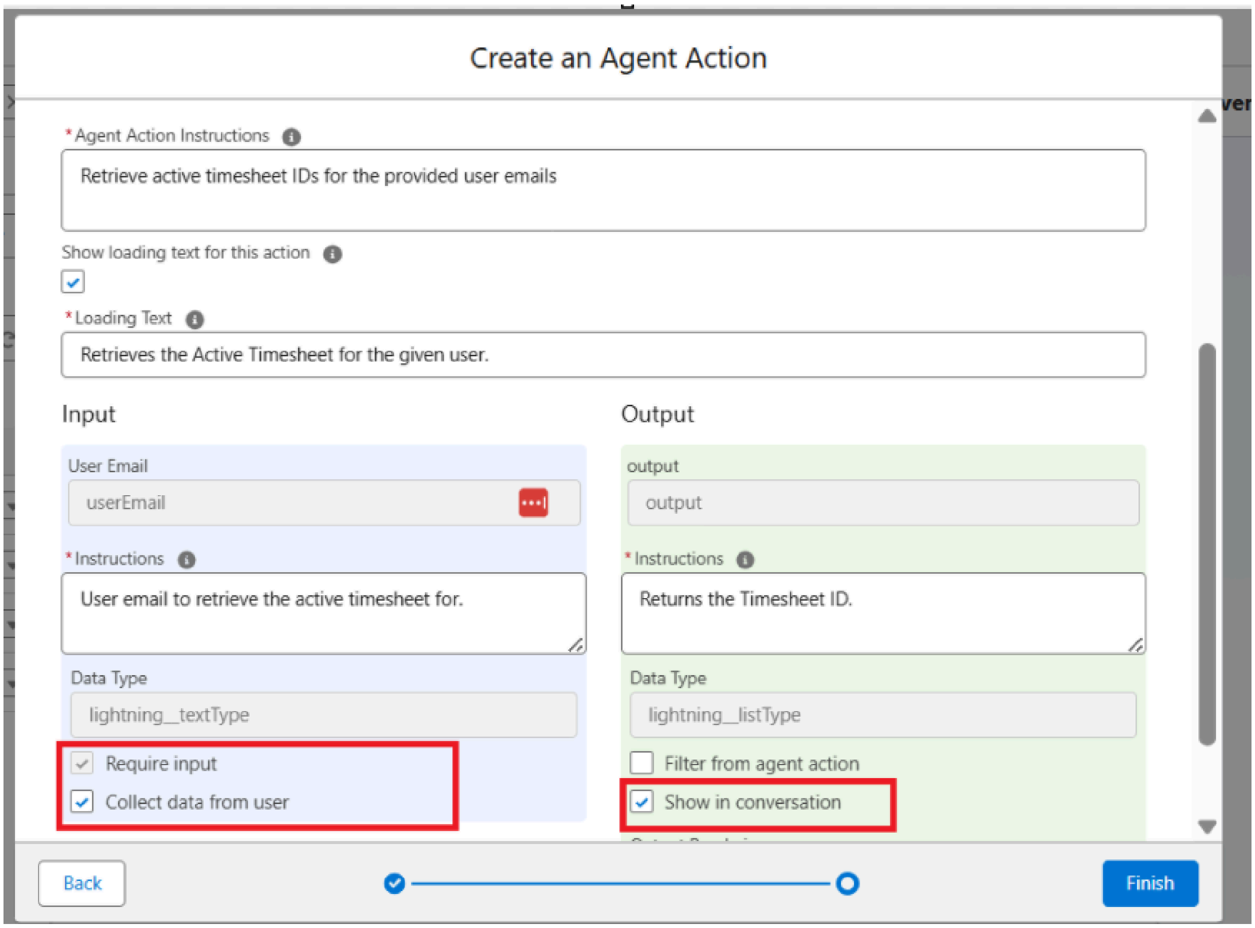


Step 4: Select **'Get Active Timesheets'** from the **Reference Action** drop-down.



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.



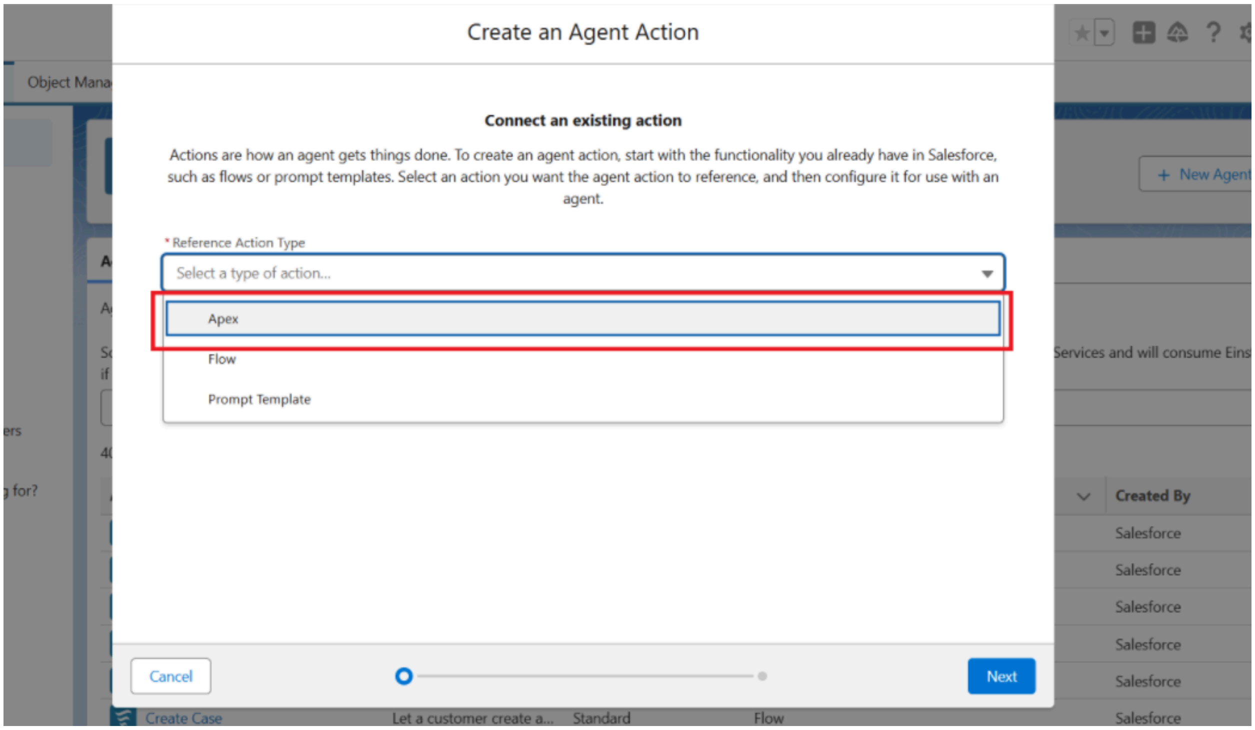
Step 7: Add this text **'Returns the Timesheet ID.'** in the **'Instructions'** field of the output Section.

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

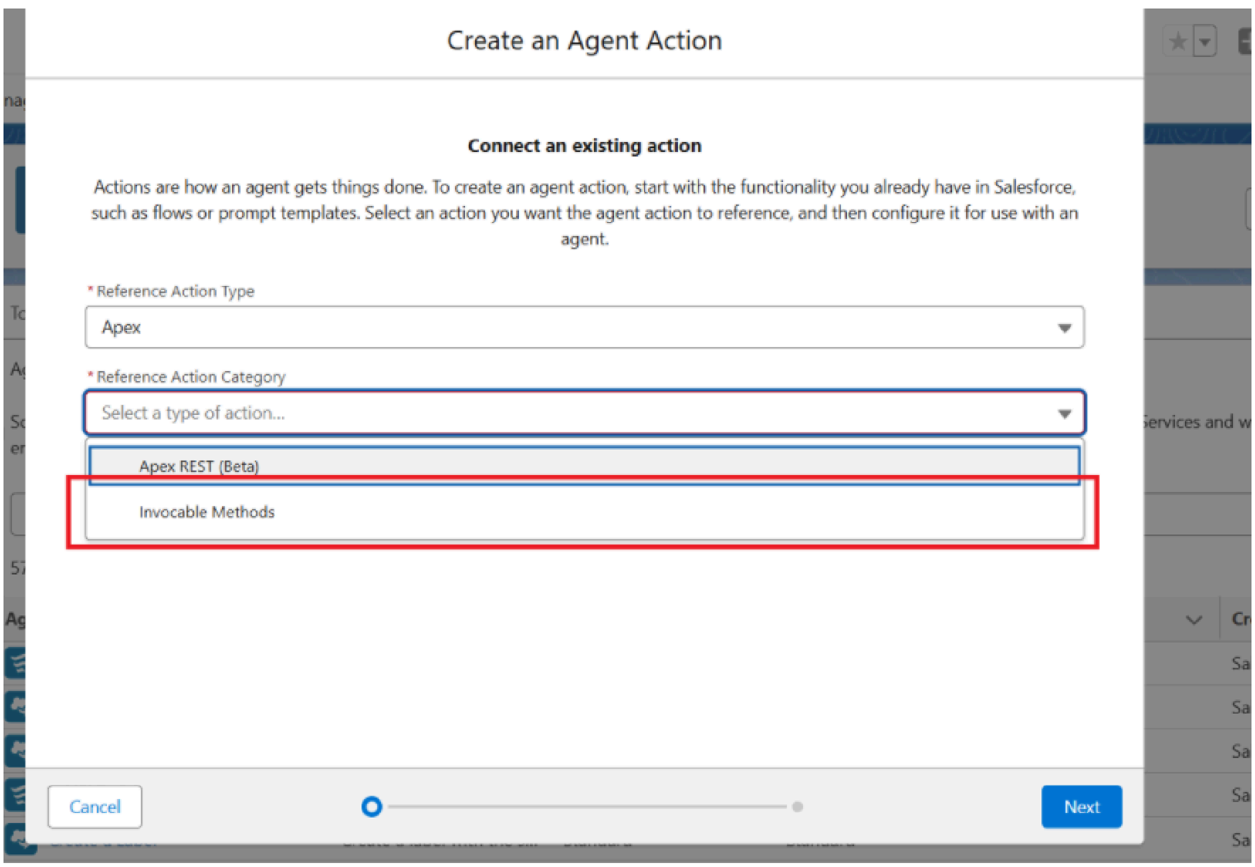
4. Log Work Hours

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

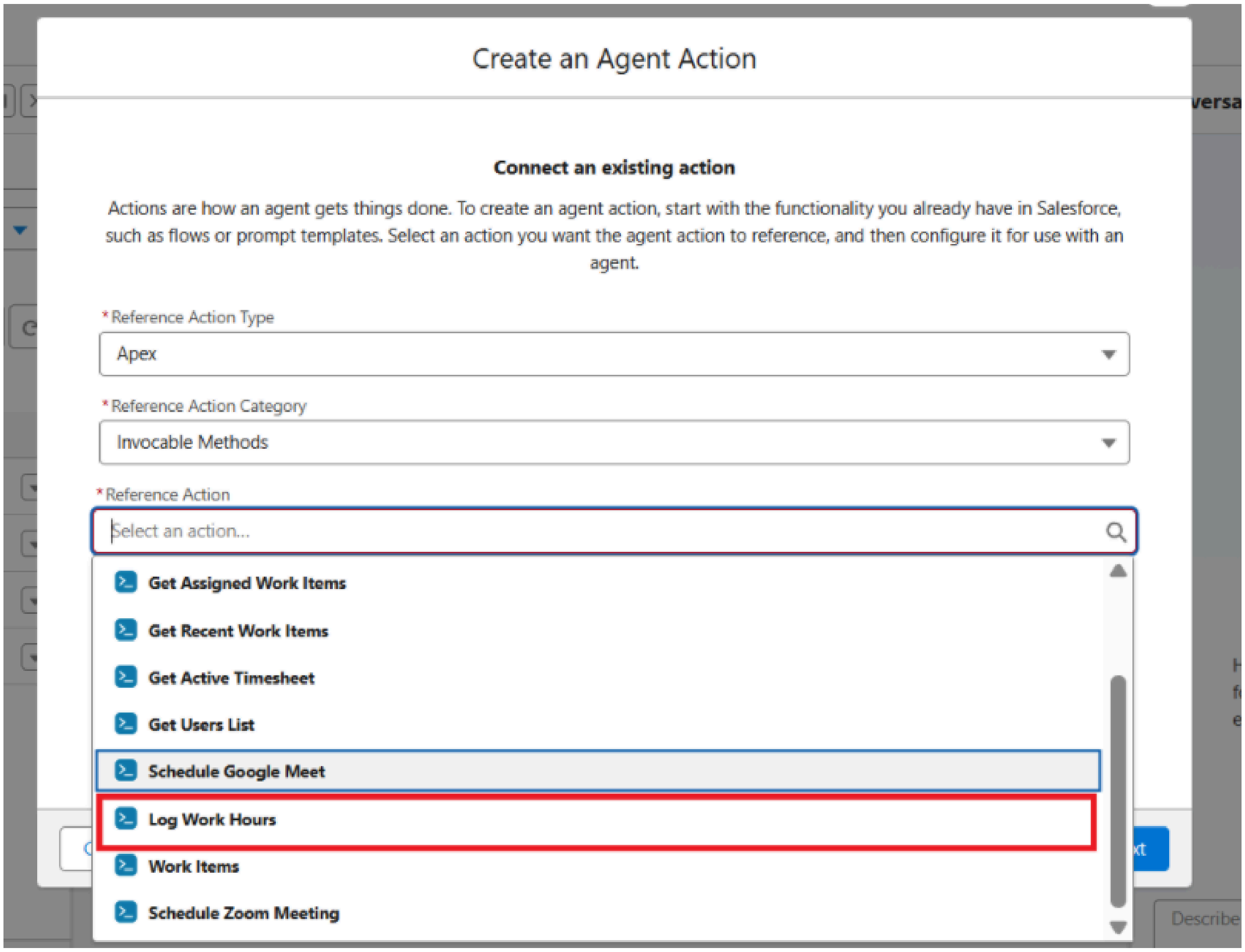
Step 2: Select **'Apex'** from the **Reference Action Type** drop-down.



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

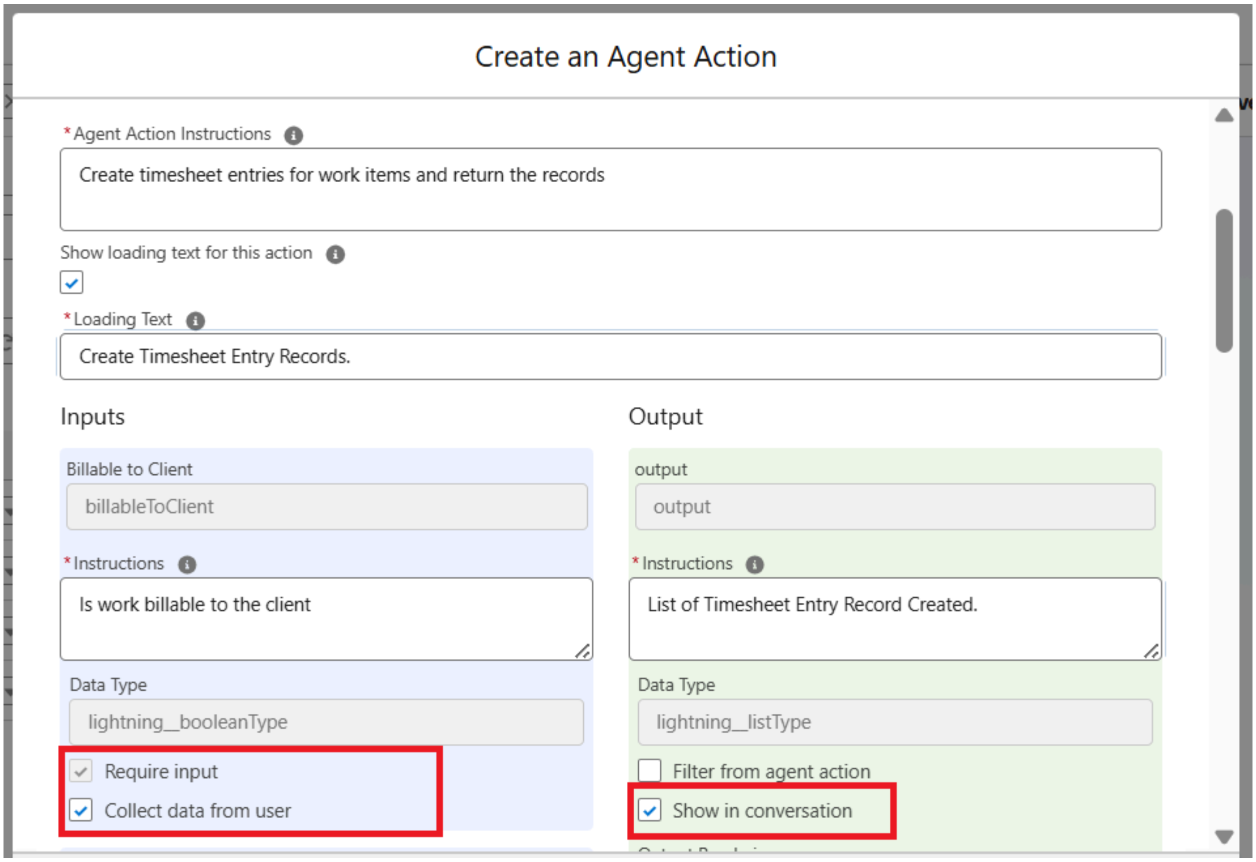


Step 4: Select **'Log Work Hours'** from the **Reference Action** drop-down.



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.



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

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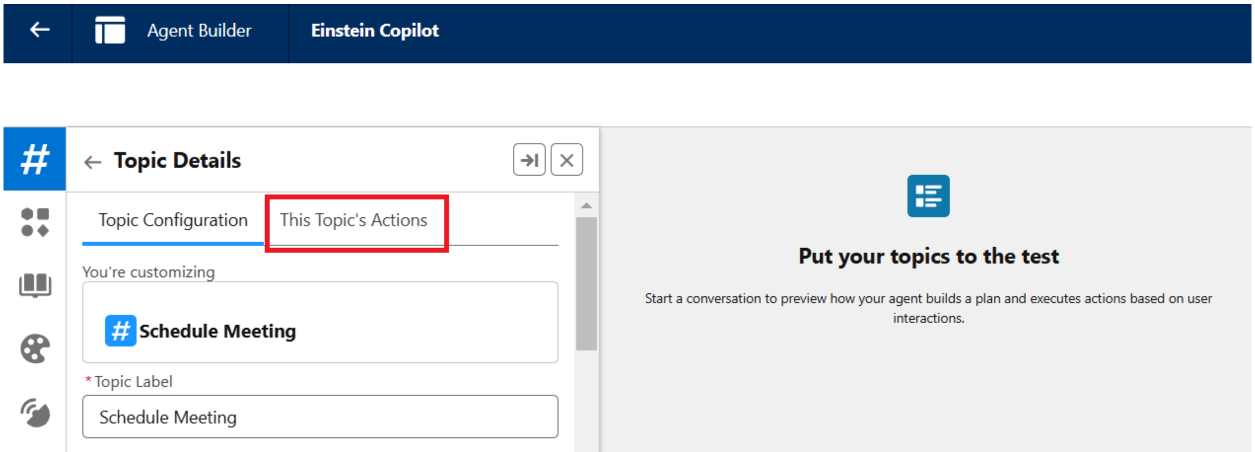
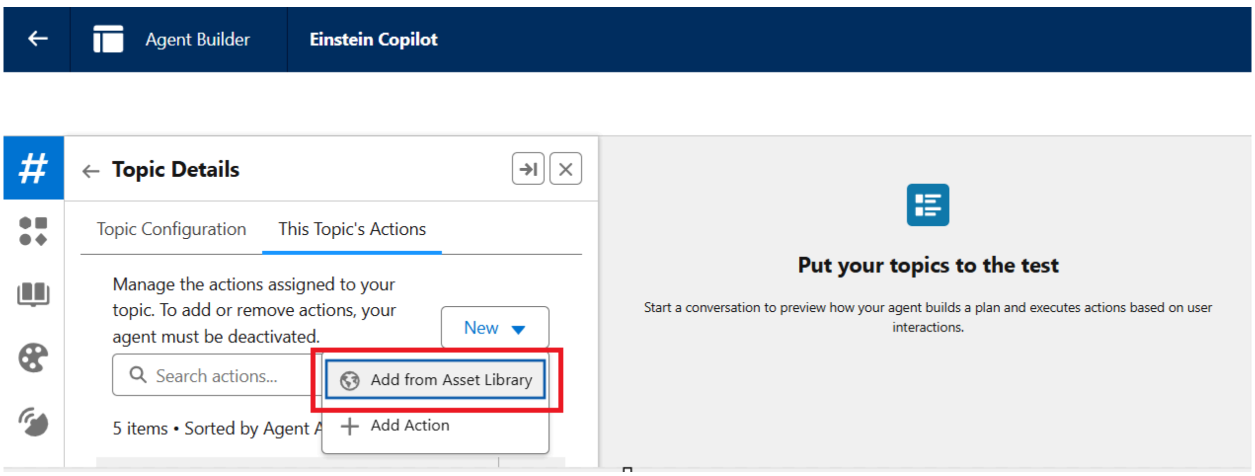
Step 1: Go to Setup => Agentforce Agents => Einstein Copilot => Open in Builder => Log Hours

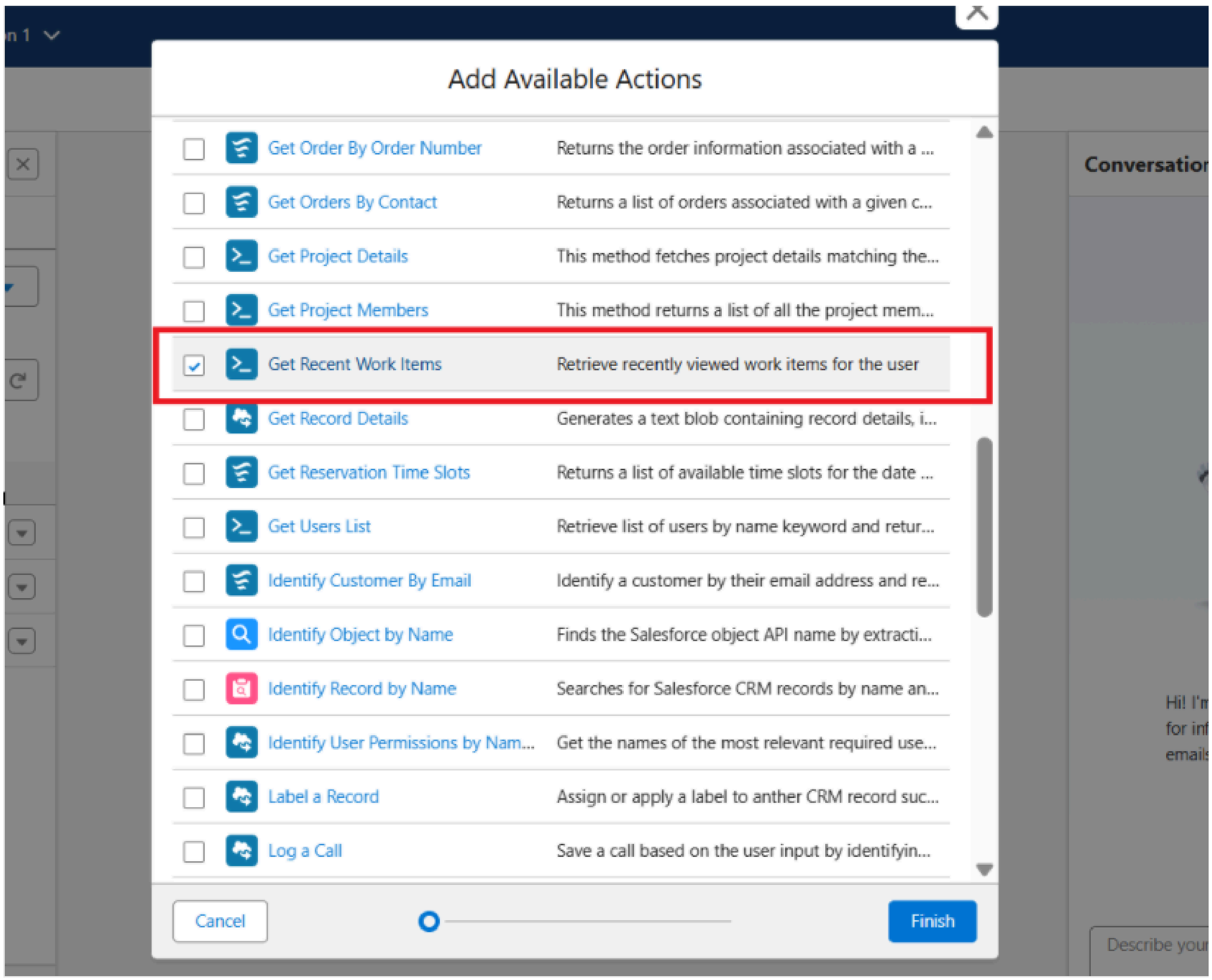
Step 2: Go to **'This Topic's Actions'**.



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

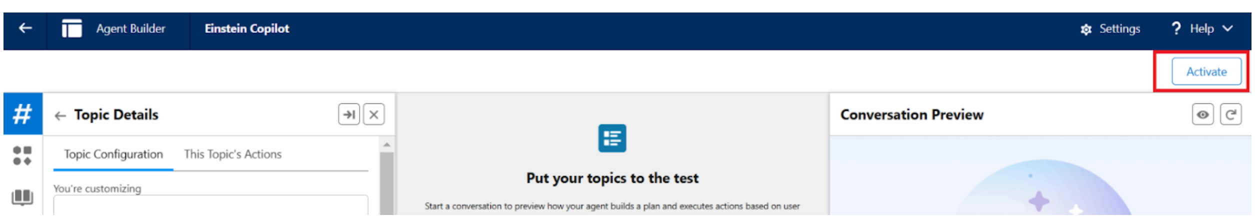


Step 4: Select the **'Get Recent Work Items'** created in agent actions from the library.

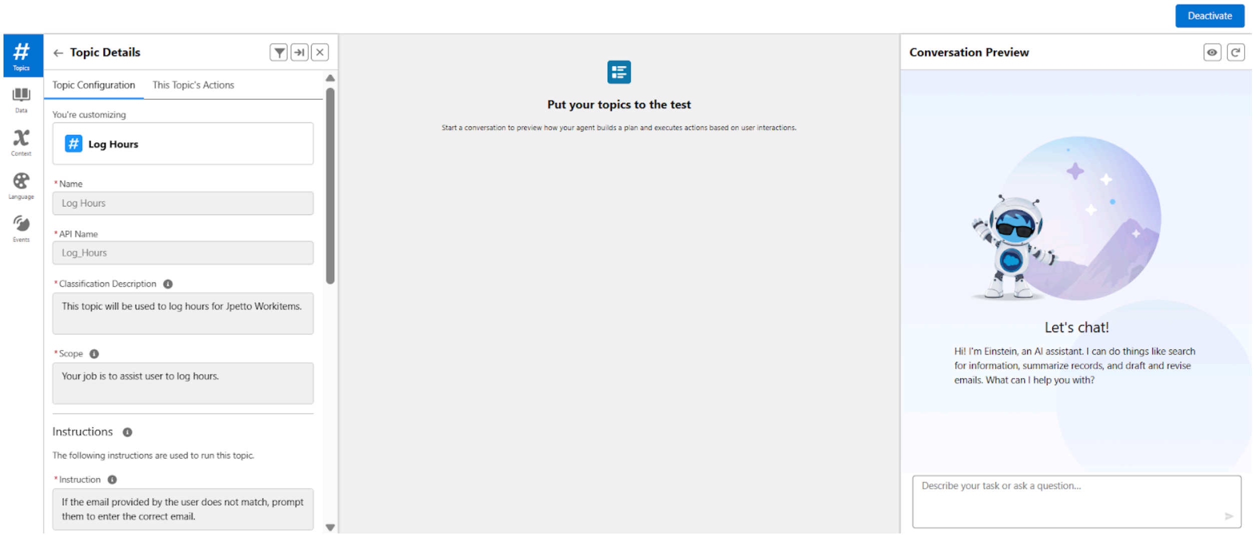


Step 5: Click **'Finish'**. Repeat till Step 4 to add the topic **'Get Assigned Work Items'**, **'Get Active Timesheet'**, **'Log Work Hours'** from the library to the agent.

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
Topics
Data
Context
Language
Events
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...