

# **Jpetto Project Manager - Agentforce Suite**

User Guide Part-1

**Schedule the Meetings using Einstein Copilot**



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## Agentforce

Salesforce Agentforce is a platform that allows organizations to create, customize, and deploy AI agents for business functions. By taking advantage of it we come up with a use case in Jpetto to schedule the meet with users or project-specific team via google meet or zoom based on the scheduler choice by AI agents.

## Overview

In Jpetto AI Extension app users can easily schedule the meetings with an user/s or with project-specific team members directly from the salesforce UI page using AI agents to discuss project status, requirements, challenges facing, etc.. 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 for scheduling a call:

1. Would you like to schedule a meeting for a specific project or as a general meeting?  
For General Meeting:  
=====
2. Would you like to schedule the meeting on Google Meet or Zoom?
3. Please provide the names of the attendees for the meeting if the general meeting is selected in Step 1.
4. Please provide the following details to schedule the Google Meet:
  - Meeting Summary
  - Meeting Description
  - Start Time (in ISO 8601 format, e.g., 2025-01-20T17:25:10Z)
  - Duration (in minutes)
5. A meeting is scheduled and invites sent to the respective recipients.  
For Project-specific Meeting:  
=====
6. Please provide the name of the project for which you would like to schedule the meeting.
7. If multiple projects are available matches with the name given then a list of projects will be displayed to select the one to schedule call.
8. With selection of the project among the list, AI fetches the list of PTM(Project team members) related to the project with their names and email address to confirm.

9. Would you like to proceed with scheduling the meeting with this team member? If yes, please specify whether you prefer Google Meet or Zoom, along with the meeting details such as start time, duration, summary, and description.
10. With all the provided information a meeting will be scheduled and invites are sent to the recipients.

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

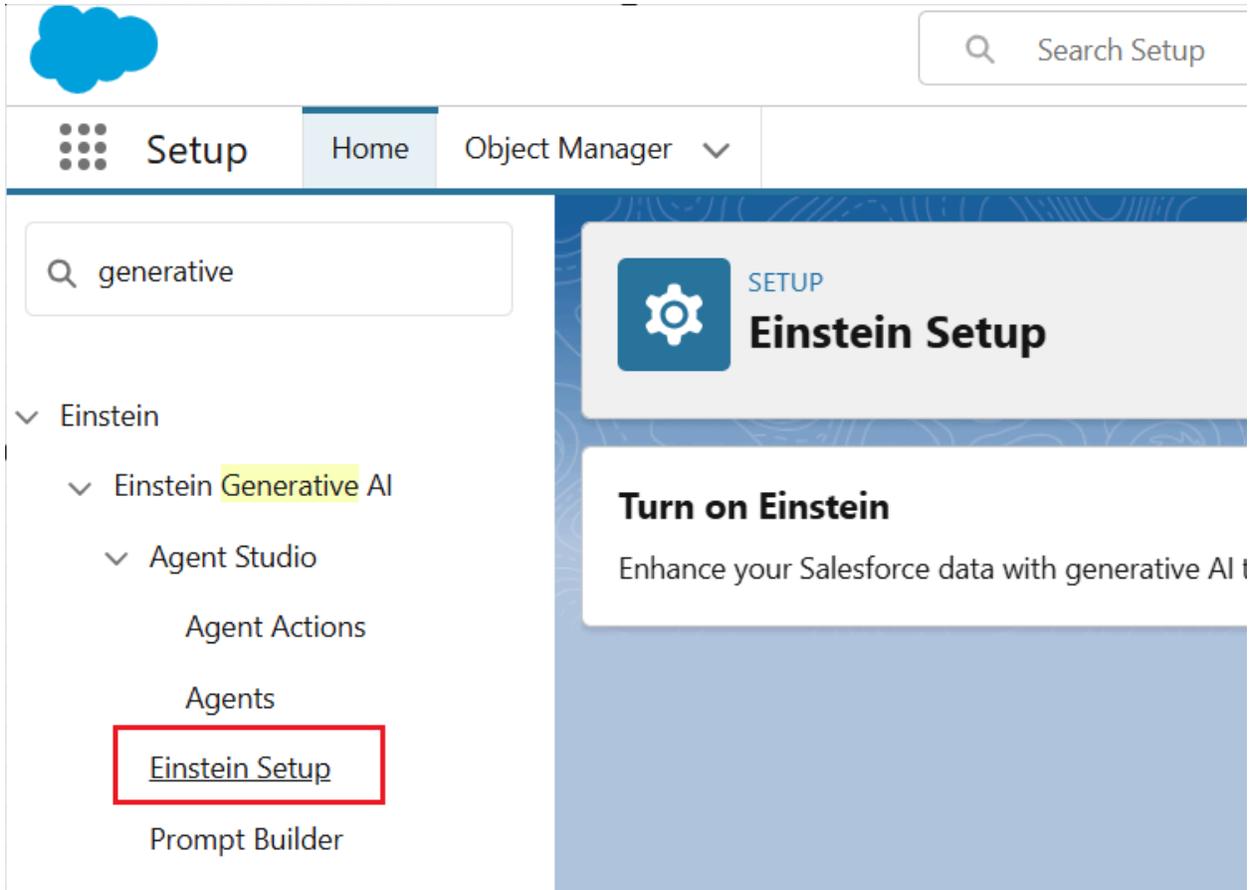
#### **Steps to create agent actions for use case:**

##### **Turn-On Einstein**

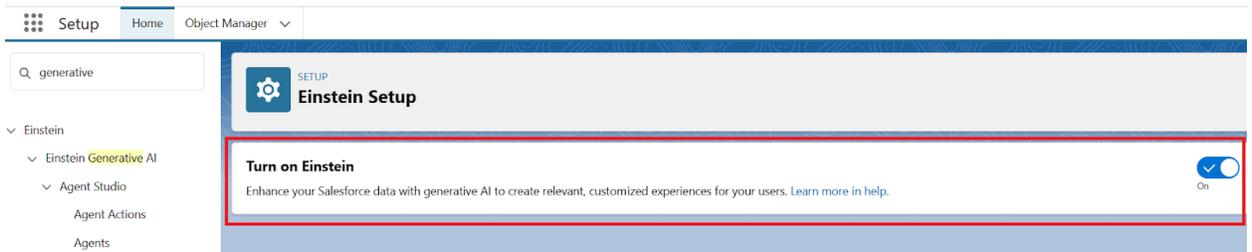
=====

**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.

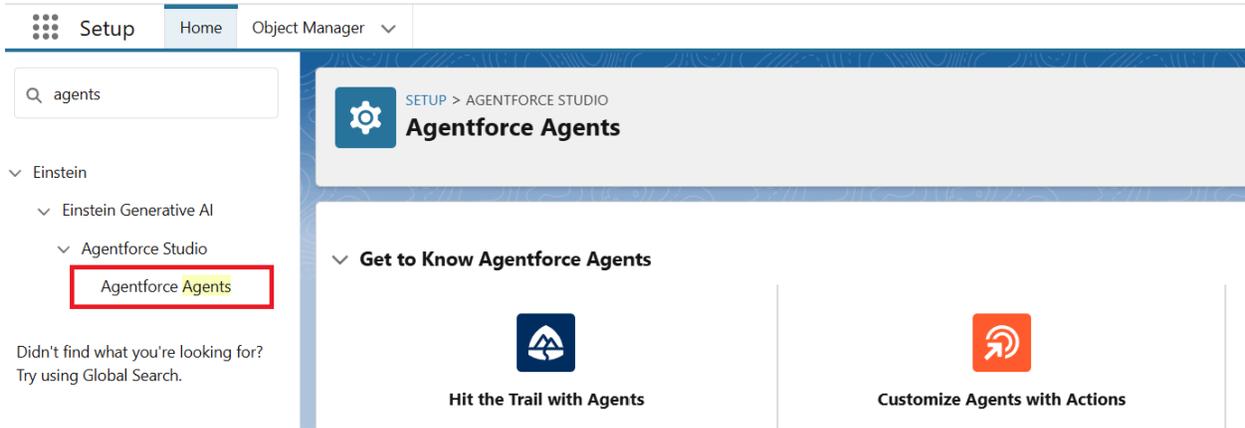


**Enable Agents:**

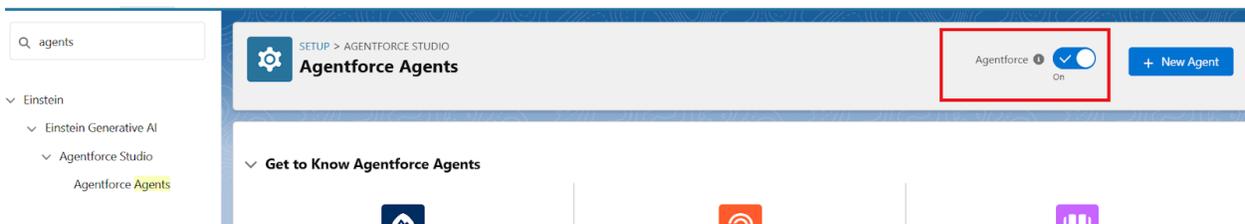
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**Step 4:** Click Setup.

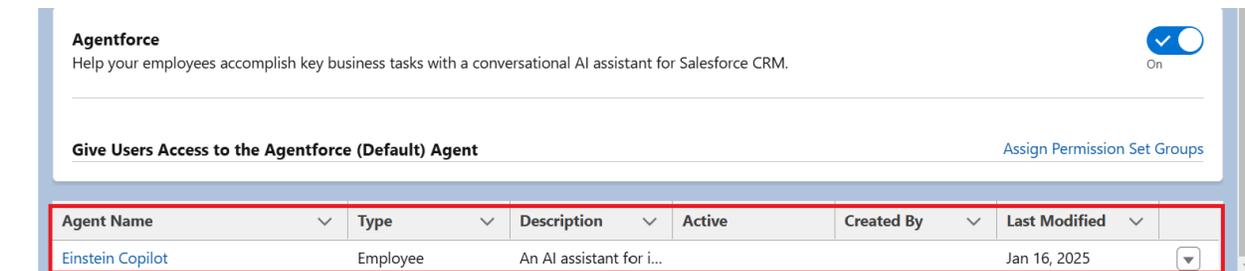
**Step 5:** In the quick find, search for Agents and click on **Agentforce Agents** (under Agentforce Studio).



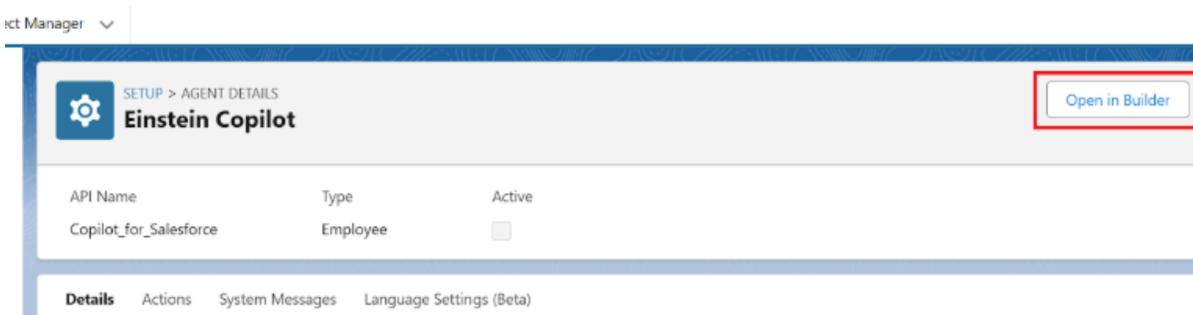
**Step 6:** Turn on the **Agentforce** toggle.



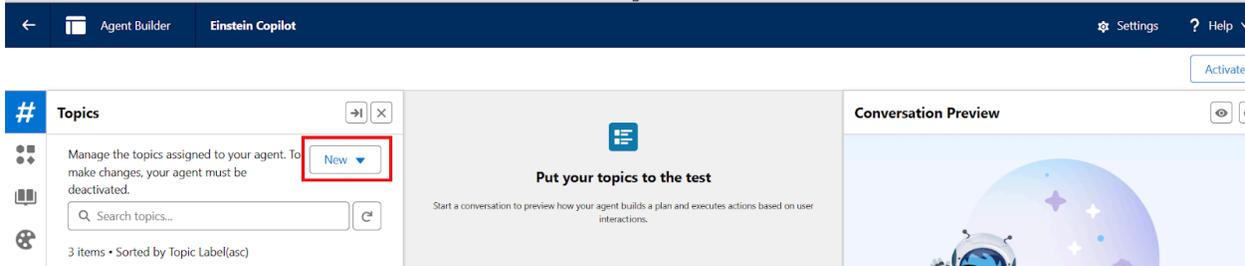
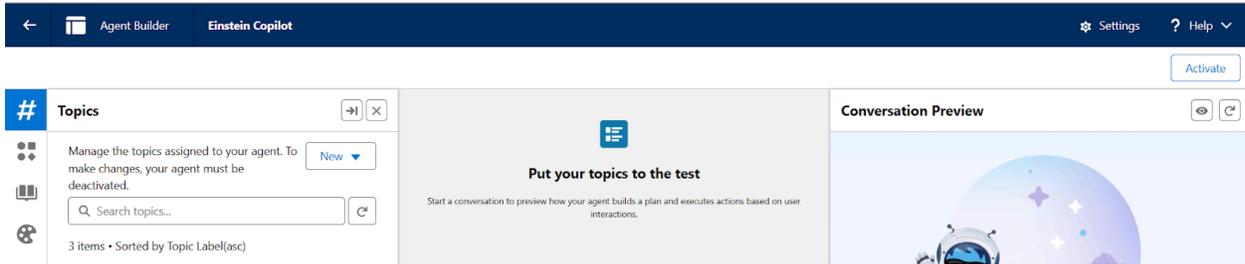
**Step 7:** Refresh the page, In the list of agents (at the bottom of the screen), click **Einstein Copilot** (it's the only item in the list).



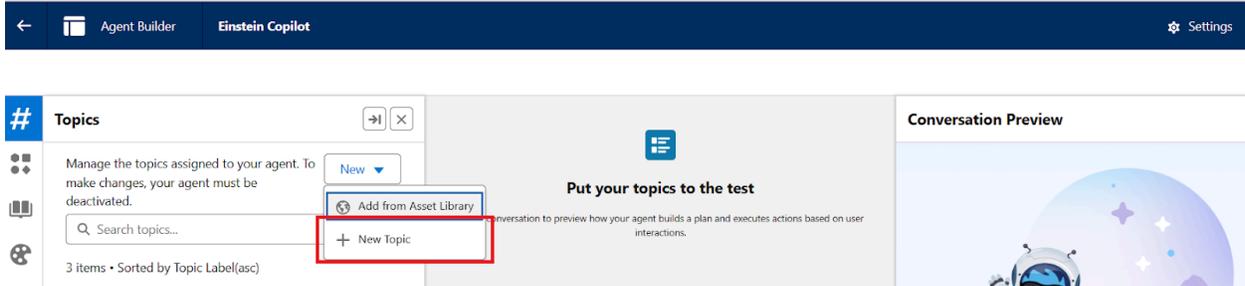
**Step 8:** Click **Open in Builder** (upper right corner).



**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 (Call Scheduling).



**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) :** Schedule google/zoom meetings for general/project-specific discussions with the team.

**Topic Label :** Schedule Meeting

**Classification Description :** Engages and interacts with the user to schedule the meetings.

**Scope :** Your job is to take input from the users and schedule the meetings.

**Instructions :**

**Instruction 1:** If the user wishes to schedule a meeting, inquire whether they would like to set it up for a specific project or as a general meeting.

**Instruction 2:** If they choose to schedule a general meeting, ask for the names of the attendees. Then, use the "Get Users List" action to retrieve matching user names and email addresses, display them to take confirmation from users and use those email addresses as inputs for the subsequent actions. If there are multiple users with the same name, ask for specific users.

**Instruction 3:** Then ask about whether they want to schedule a meeting on Google Meet or Zoom.

**Instruction 4:** If they want to schedule a meeting on Google Meet use action "Schedule Google Meet" and take required inputs. For the attendees emails use the emails that are retrieved using Get Users List action.

**Instruction 5:** If they want to schedule a meeting on Zoom use action "Schedule Zoom Meeting" and take required inputs. For the attendees emails use the emails that are retrieved using Get Users List action.

**Instruction 6:** If the meeting is project-specific, ask the user for the project name. Use the "Get Project Details" action to retrieve information and confirm the project with the user. Once confirmed, use the "Get Project Members" action to retrieve the names of the project team members. And ask user confirmation about the project team members. Then use the email addresses provided as attendees Emails.

**Instruction 7:** Repeat the process of scheduling the meets.

**Instruction 8:** If multiple projects are found with the input user provided, ask about selecting the project from the user.

**Instruction 9:** Always keep the date and time in this format 'yyyy-MM-dd\T\HH:mm:ss' and never add 'Z' in date and time.

**Instruction 10:** If the user gives the date something like this 'Tomorrow at 11' automatically convert this into this format 'yyyy-MM-dd\T\HH:mm:ss'.

**Instruction 11:** While showing a projects list/ Users list show a comprehensive list of projects instead of radio buttons.

**Example User Input :** I want to schedule the meeting.

**Step 12:** Click on **Next**

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

**Step 14:** Click on **Finish**.

**Add Agent Actions**

=====

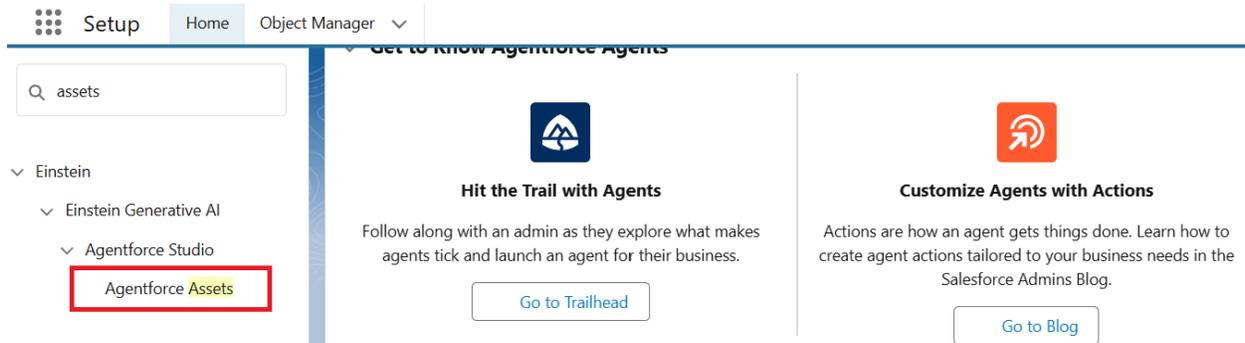
For Schedule Meeting we have to create 5 agent actions as outlined below:

1. Schedule Google Meet
2. Schedule Zoom Meeting
3. Get Project Details
4. Get Project Members
5. Get Users List

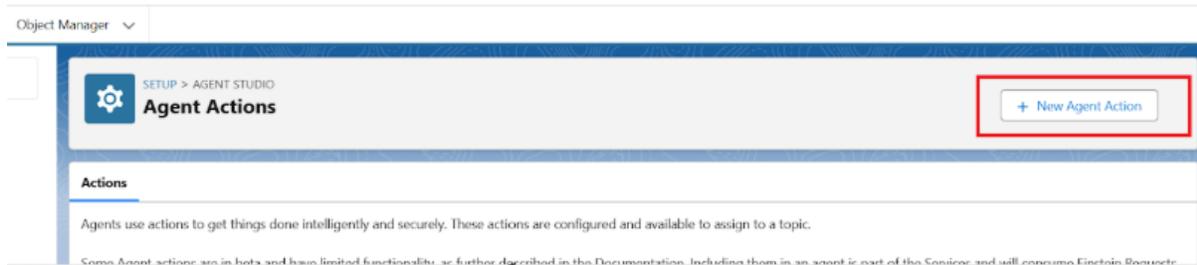
# 1. Schedule Google Meet

**Step 1:** Click Setup.

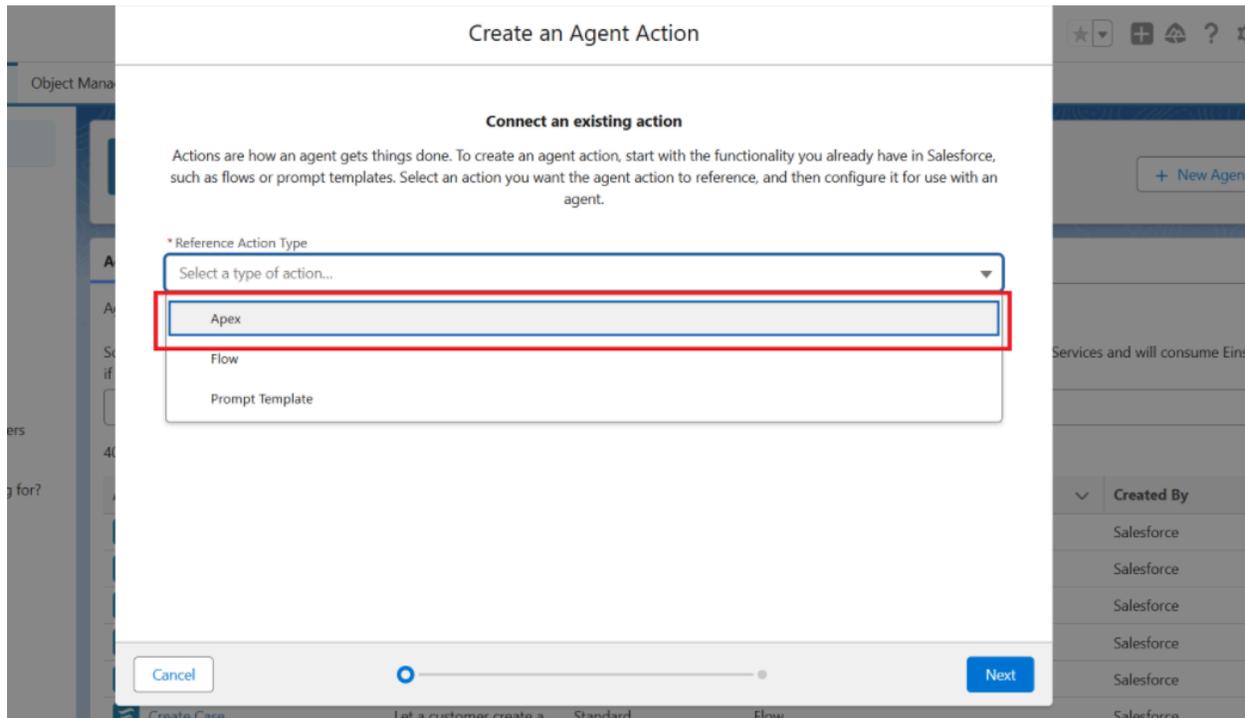
**Step 2:** In the quick find, search for 'Assets' and click on **Agentforce Assets** (under Agentforce Studio).



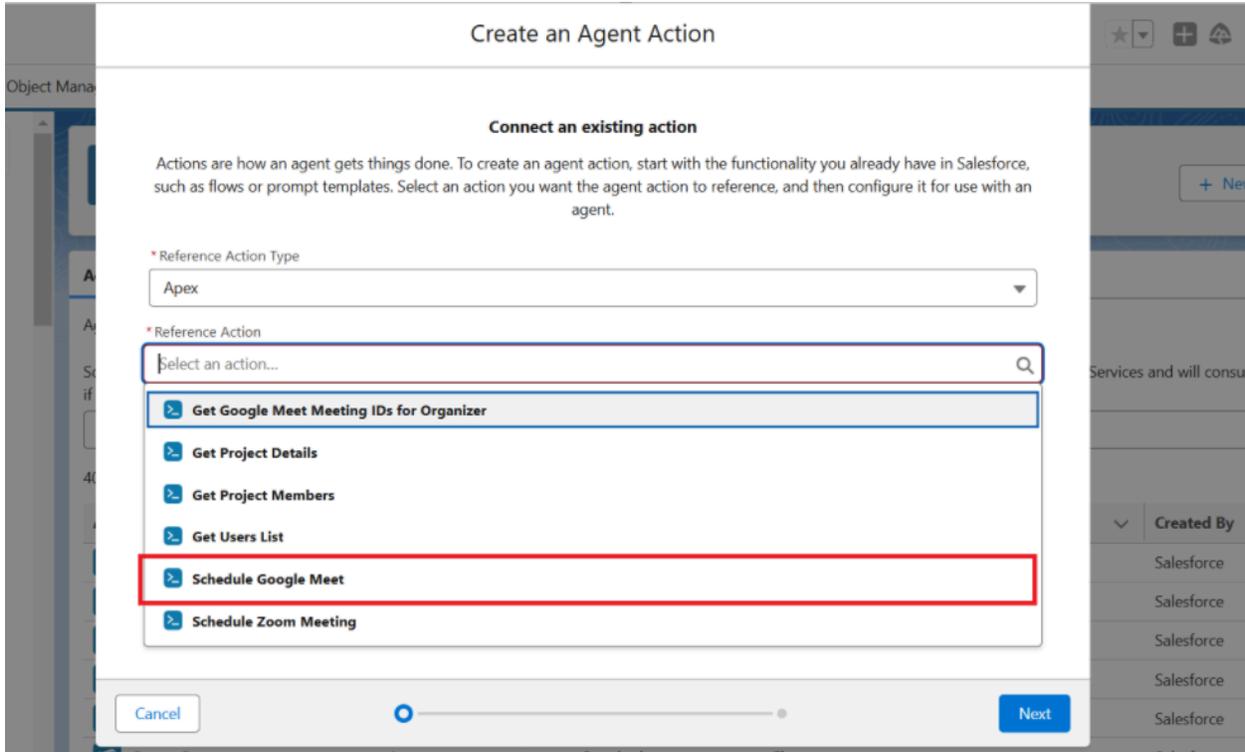
**Step 3:** Switch to the **Actions** tab and click on the **New Agent Action** button.



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







**Step 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

Agent Action Label  
Schedule Google Meet

\* Agent Action Instructions ⓘ

Schedules a Google Meet meeting using the provided input details. This method accepts meeting parameters such as attendee names, meeting summary, description, start time offset, and duration. It fetches user emails from Salesforce based

#### Inputs

Attendee Emails

1 attendeeEmails

\* Instructions ⓘ

A list of Name of attendees Emails for the meeting participants.

Data Type

lightning\_listType

Require input

Collect data from user

Meeting Duration

2 durationMinutes

#### Output

output

1 output

\* Instructions ⓘ

Data Type

lightning\_listType

Filter from agent action

Show in conversation

Output Rendering

List

Back
✓
○
Finish

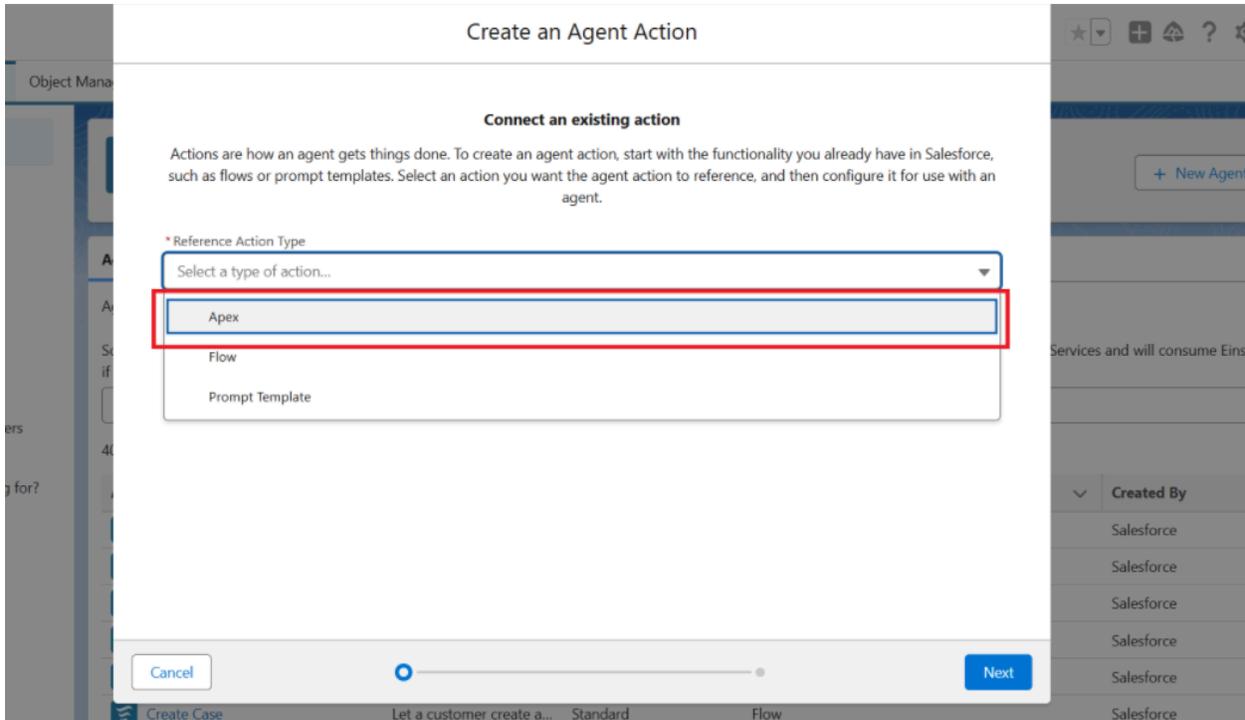
**Step 9:** Add this text ‘A list string of Google Meet Link.’ in the ‘Instructions’ field of the output Section.

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

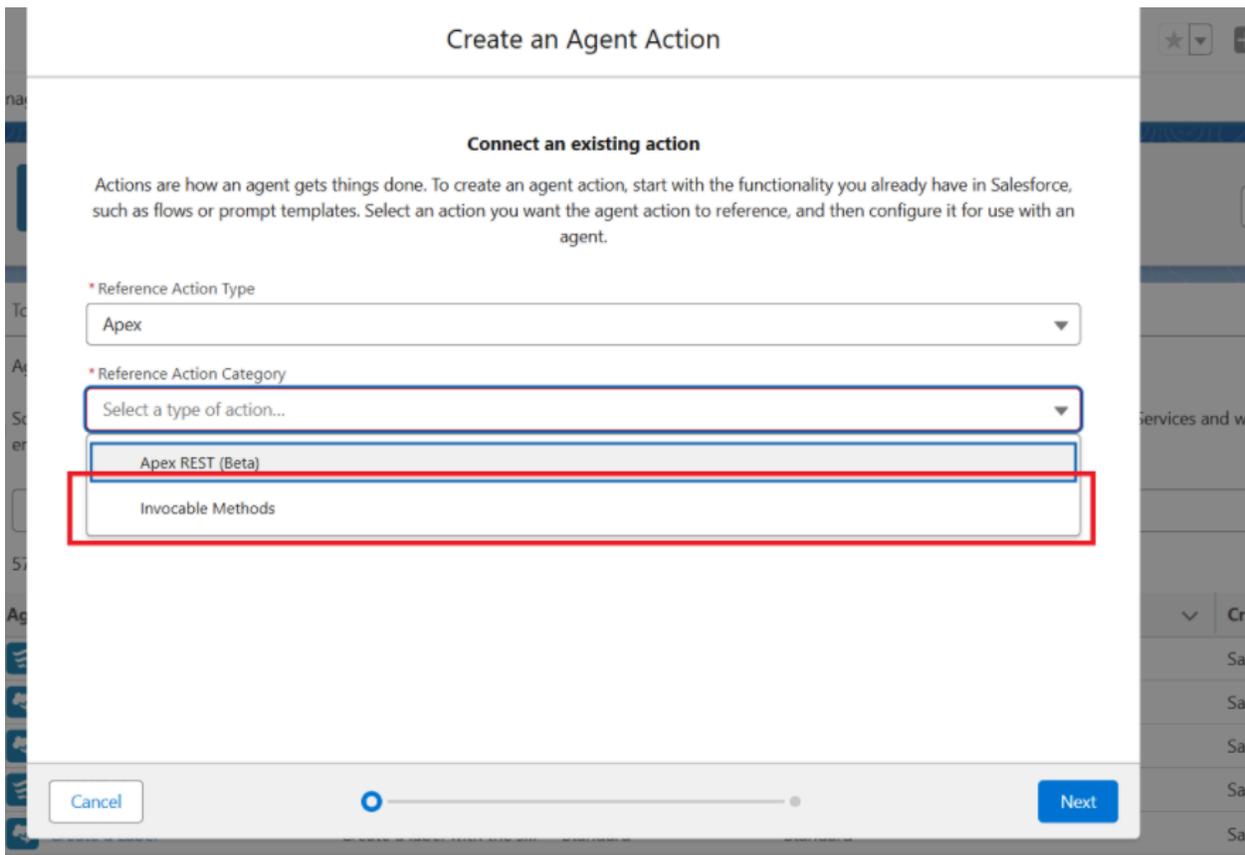
## 2. Schedule Zoom Meeting

**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 **'Schedule Zoom Meeting'** 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  
Select an action...  
Get Google Meet Meeting IDs for Organizer  
Get Project Details  
Get Project Members  
Get Users List  
Schedule Google Meet  
**Schedule Zoom Meeting**

Cancel Next

**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

agenda

\* Instructions ⓘ  
A brief description or purpose of the meeting.

Data Type  
lightning\_textType

Require input  
 Collect data from user

Attendee Emails  
2 attendeeEmails

output

\* Instructions ⓘ

Data Type  
lightning\_listType

Filter from agent action  
 Show in conversation

Output Rendering  
List

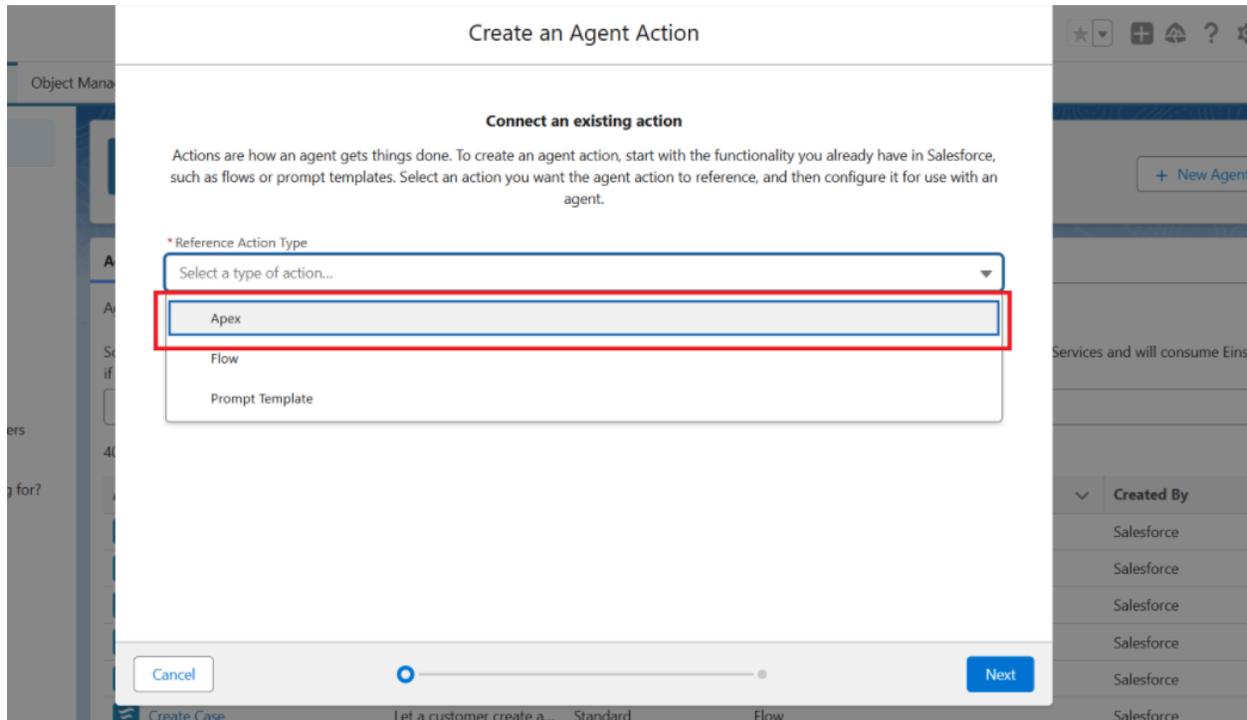
**Step 7:** Add this text **'A list of strings of Zoom Meeting Link.'** in the **'Instructions'** field of the output Section.

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

### 3. Get Project Details

**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.

### 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.

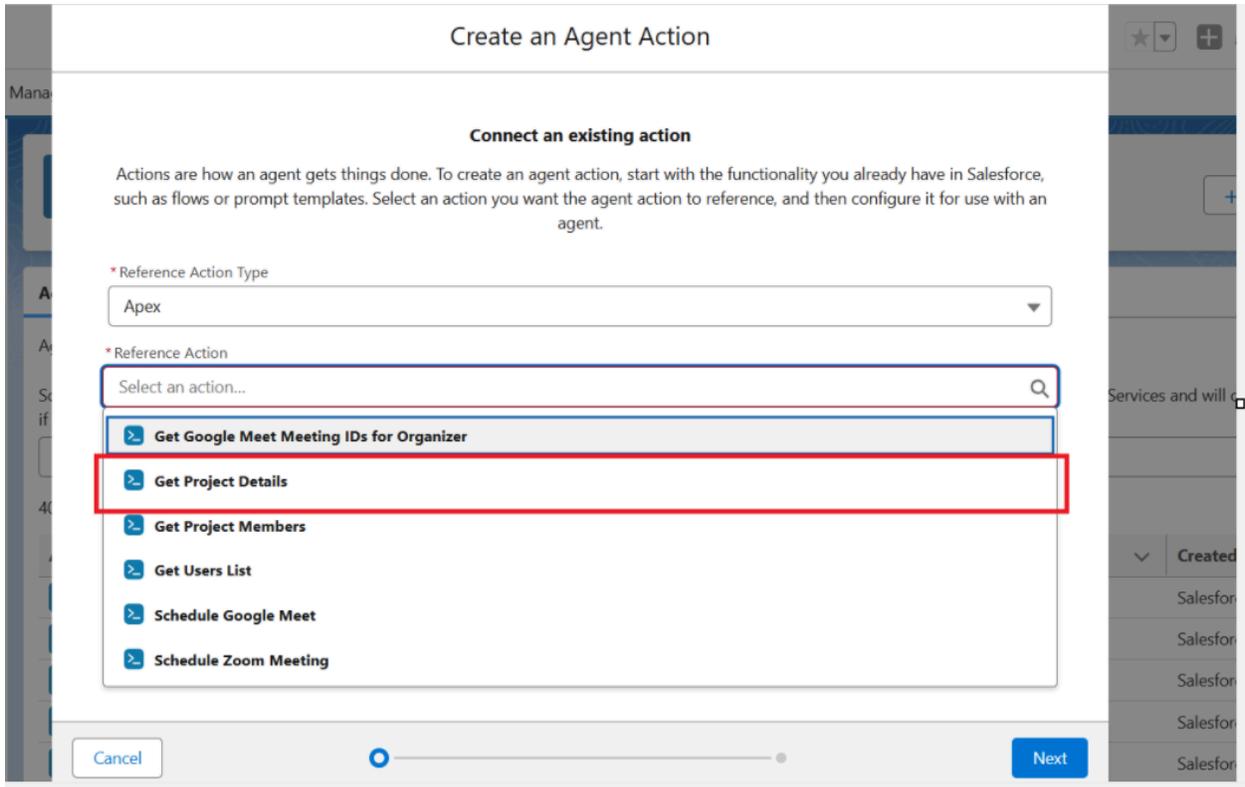
\* Reference Action Type  
Apex

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

- Apex REST (Beta)
- Invocable Methods

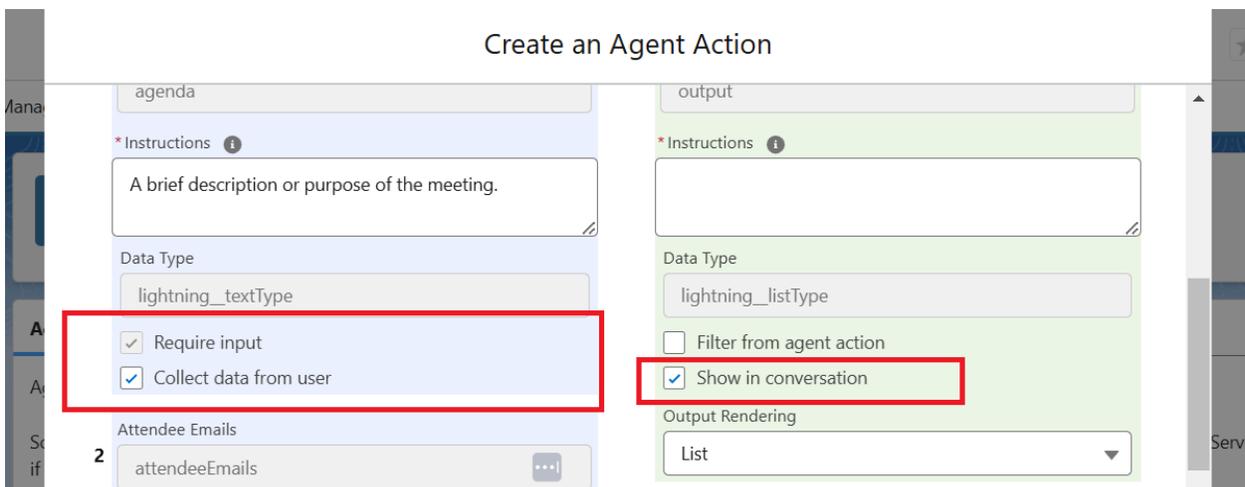
Cancel ○ ● Next

**Step 4:** Select 'Get Project Details' 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.



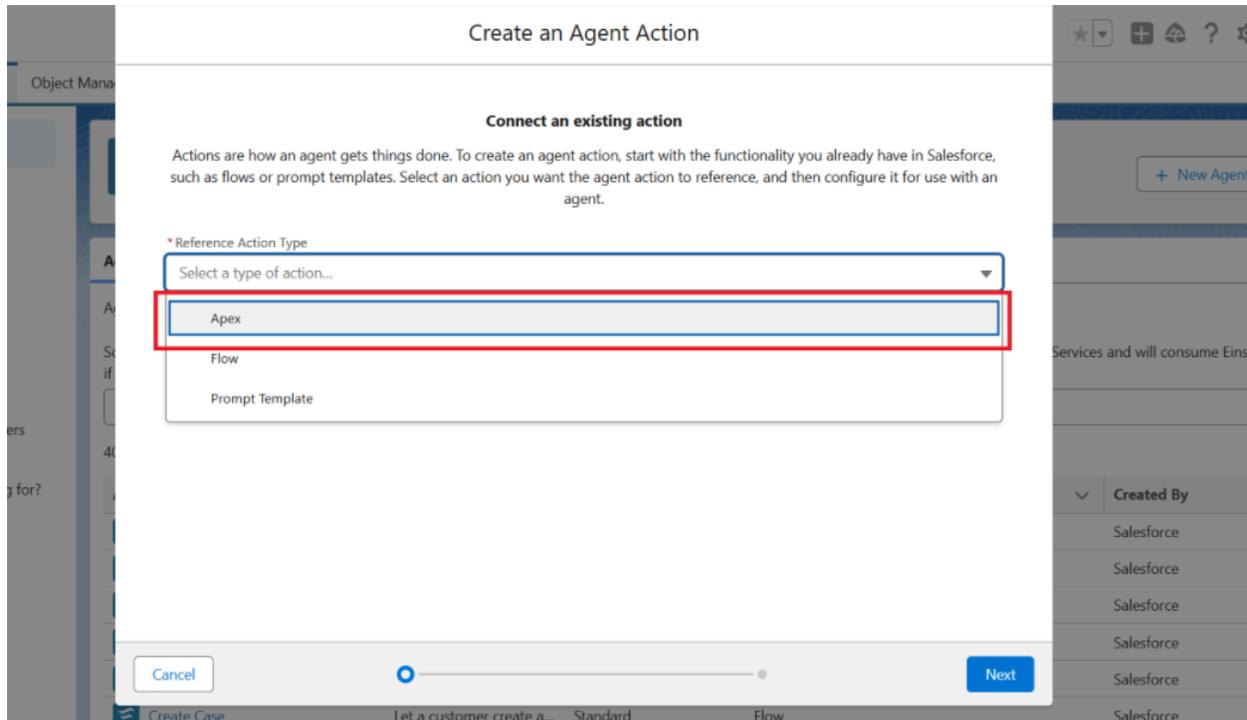
**Step 7:** Add this text **'A list of projects with their overview.'** in the **'Instructions'** field of the output Section.

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

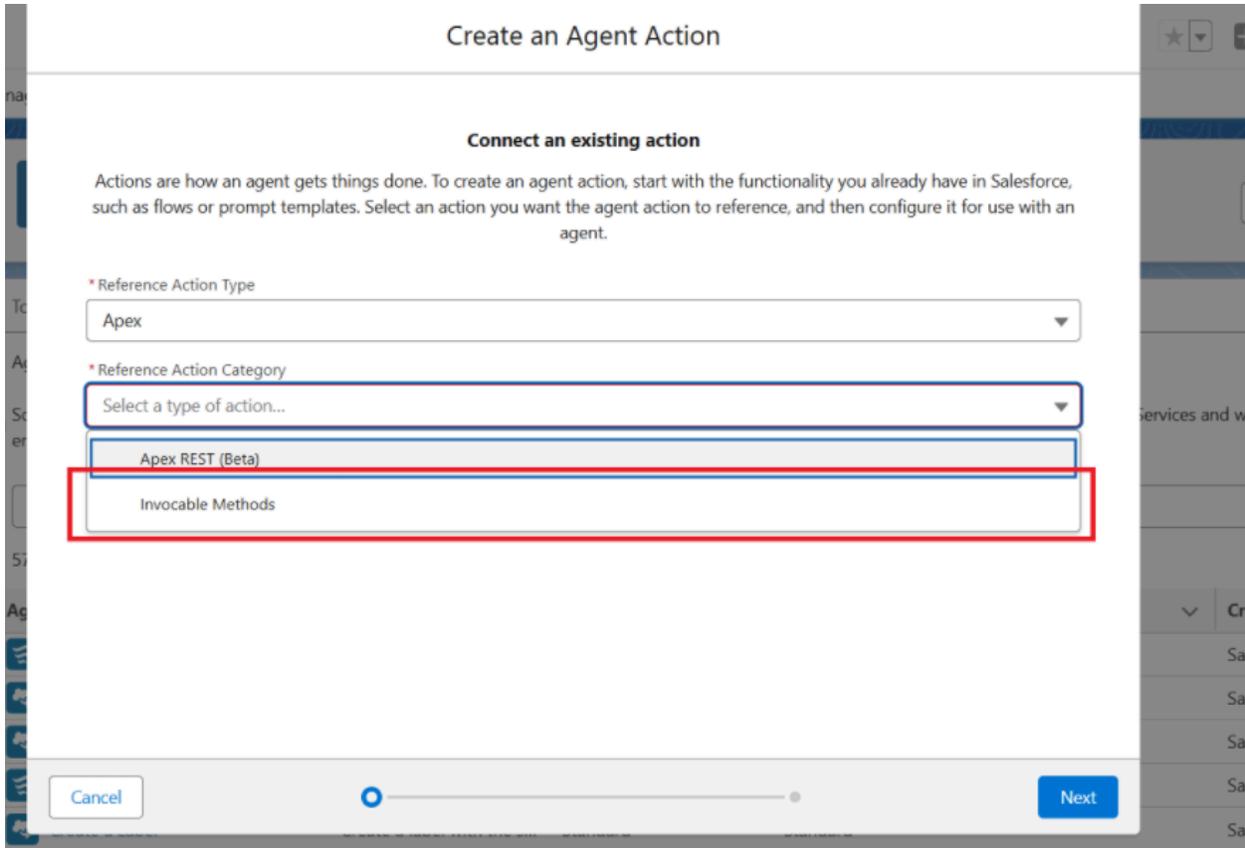
#### 4. Get Project Members

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

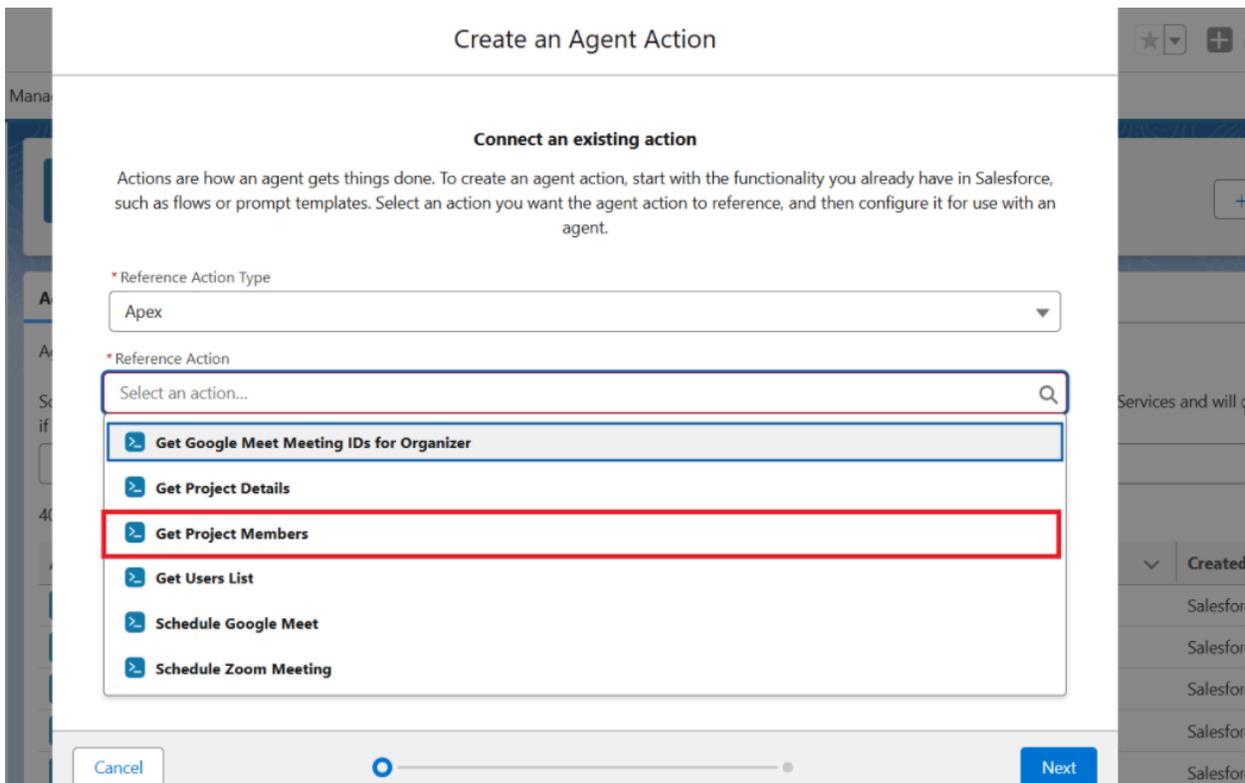
**Step 2:** Select 'Apex' from the **Reference Action Type** drop-down.



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



**Step 4:** Select 'Get Project Members' 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

agenda

\* Instructions ⓘ

A brief description or purpose of the meeting.

Data Type

lightning\_textType

Require input

Collect data from user

Attendee Emails

2 attendeeEmails

output

\* Instructions ⓘ

Data Type

lightning\_listType

Filter from agent action

Show in conversation

Output Rendering

List

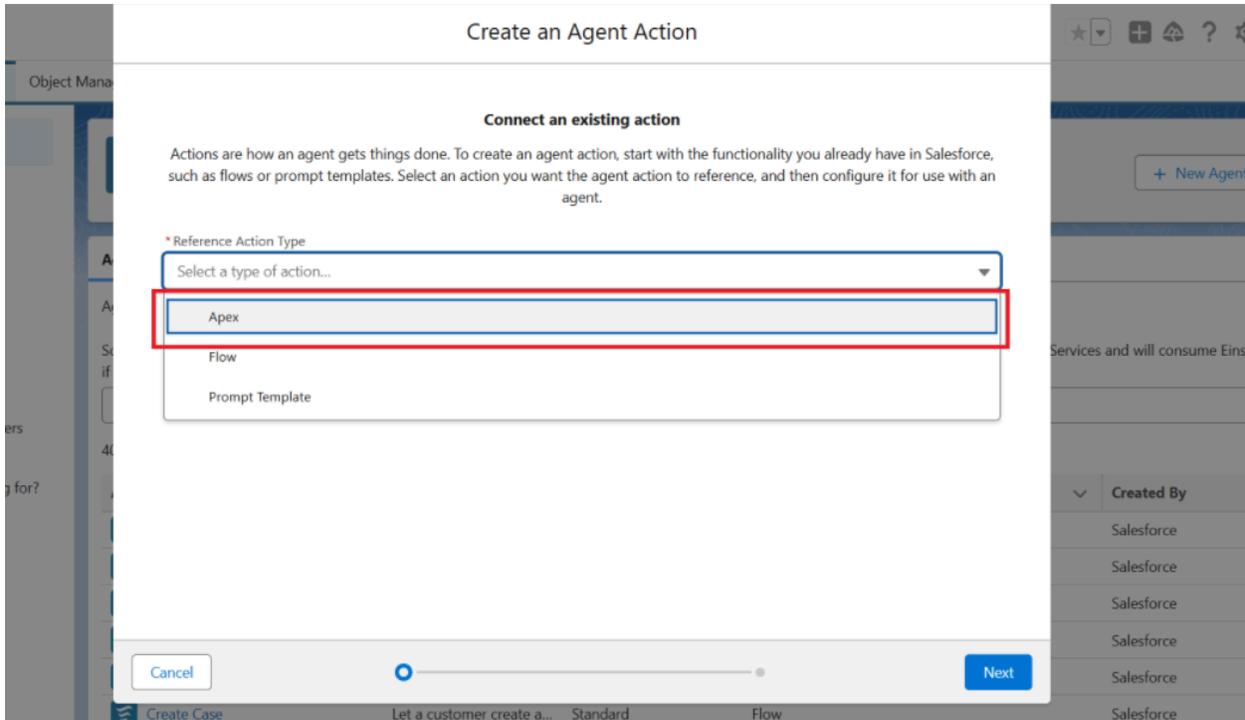
**Step 7:** Add this text **'A list of project member names.'** in the **'Instructions'** field of the output Section.

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

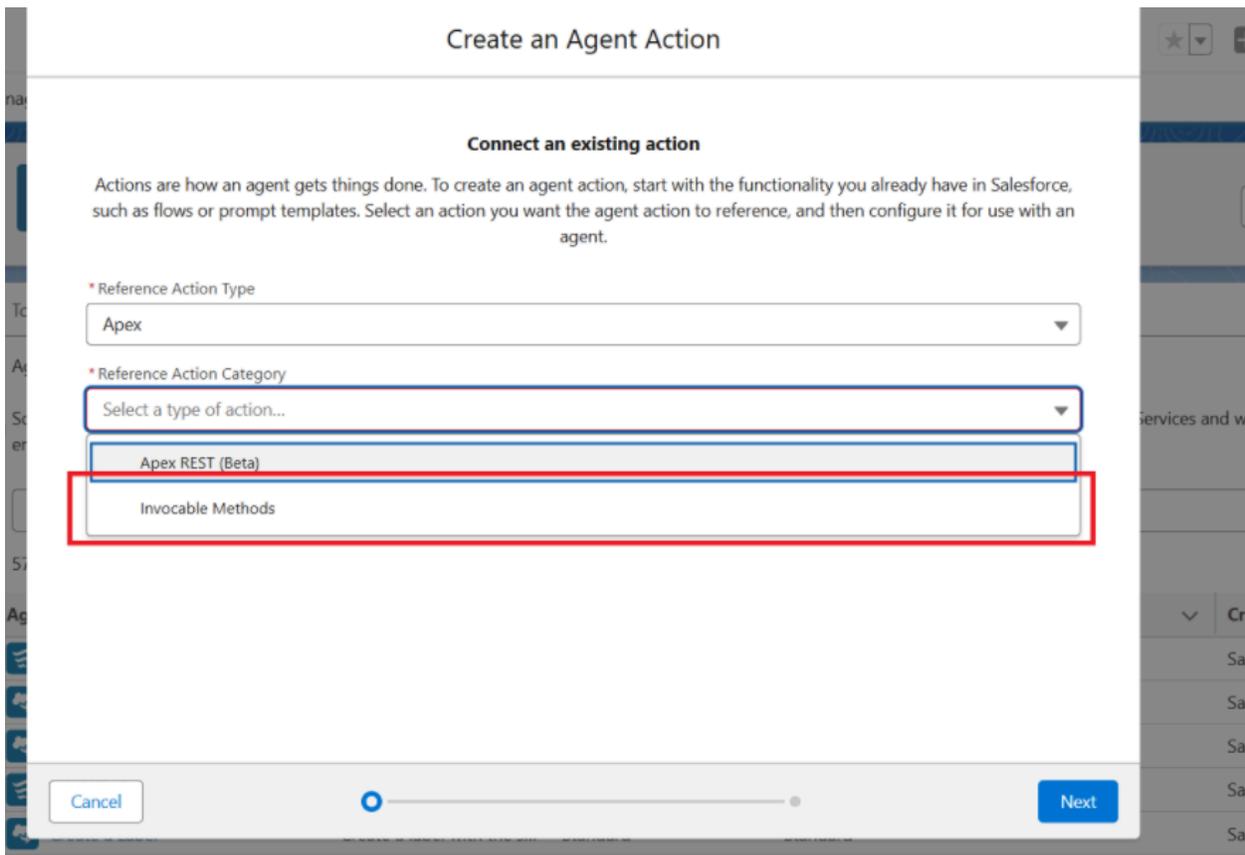
## 5. Get Users List

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

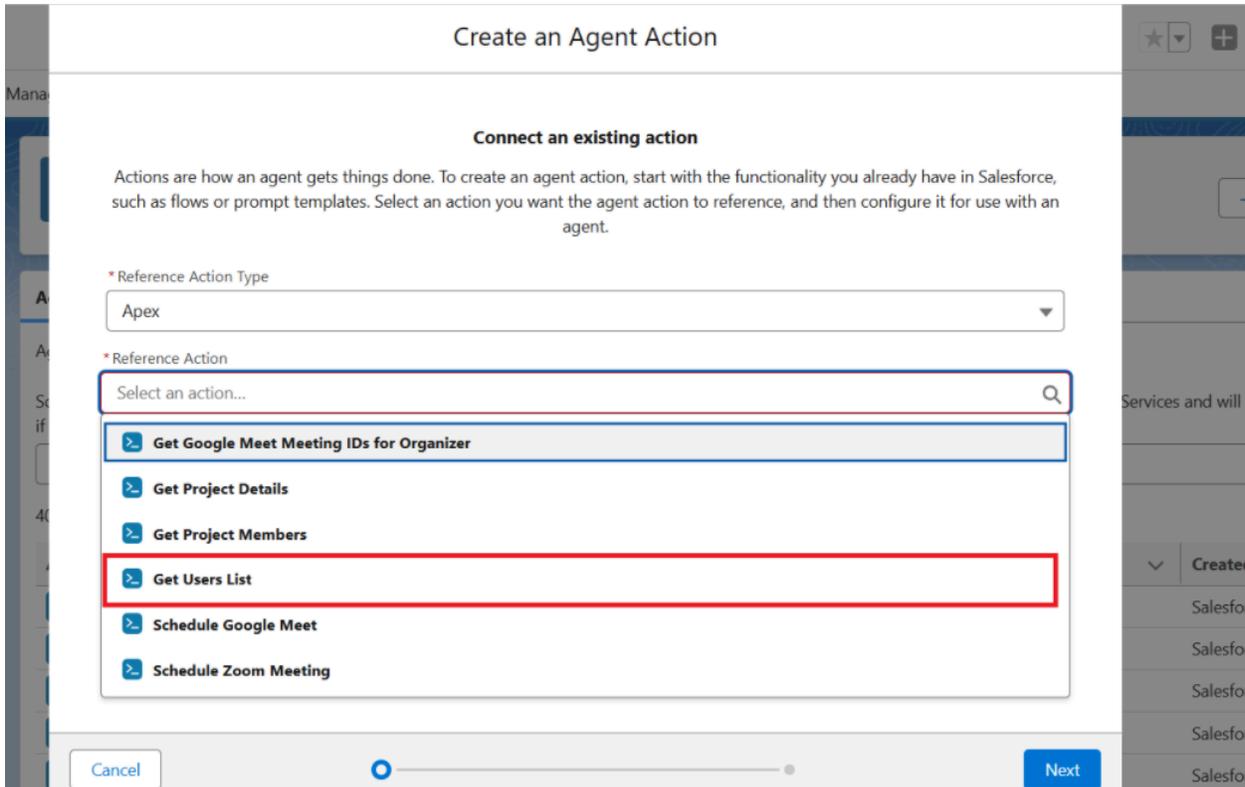
**Step 2:** Select **'Apex'** from the **Reference Action Type** drop-down.



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

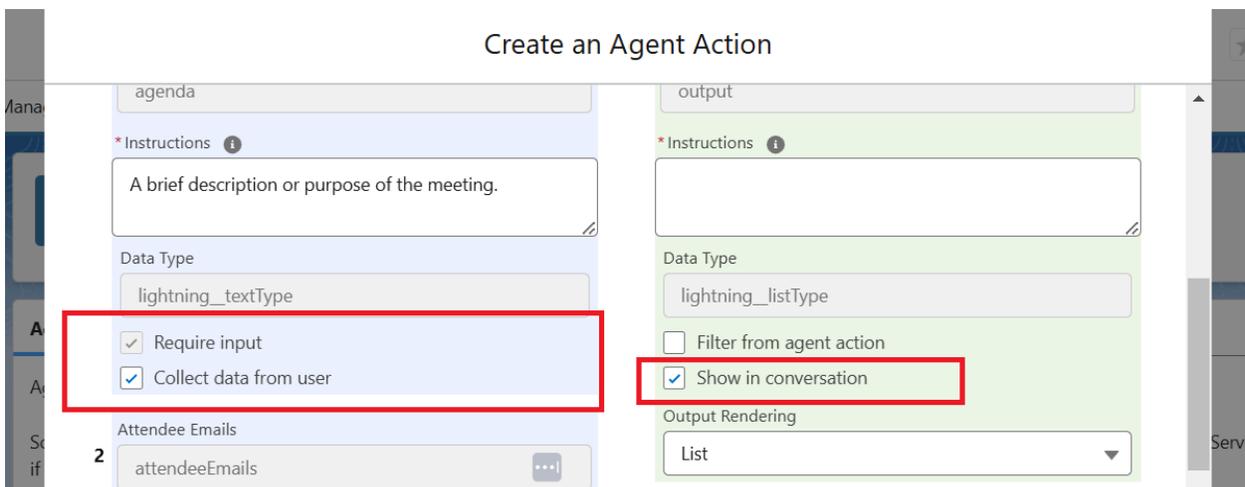


**Step 4:** Select 'Get Users List' from the Reference Action drop-down.



**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 **'A list of User Names and Emails.'** in the **'Instructions'** field of the output Section.

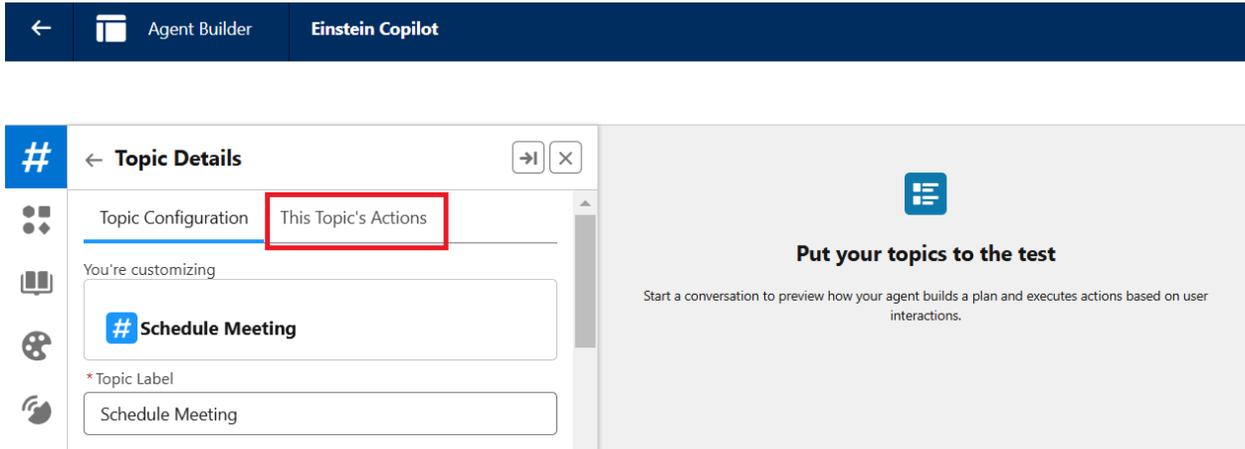
**Step 8:** Click on the **Finish** button.

## Add Agent Actions to Agent

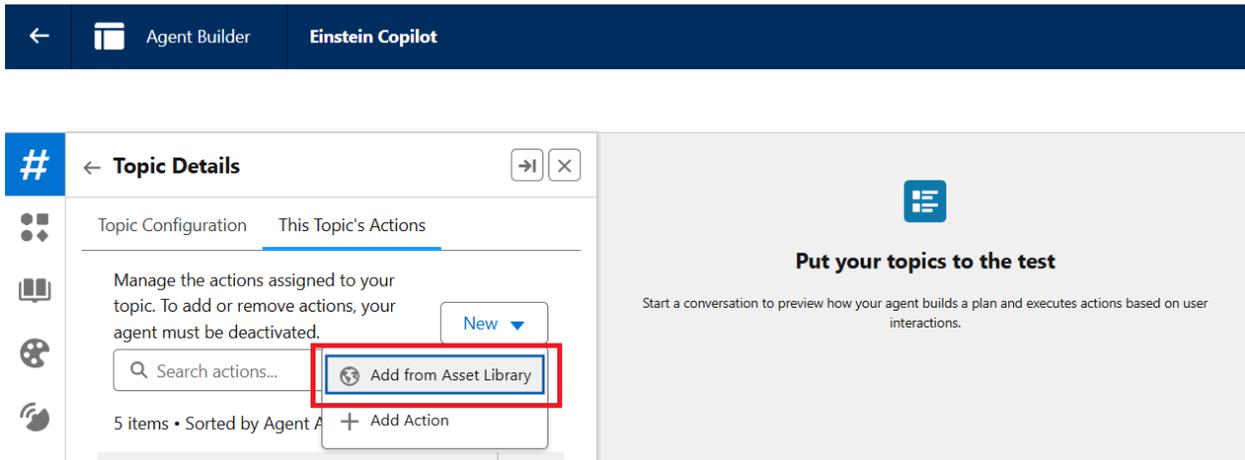
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**Step 1:** Go to Setup => Agentforce Agents => Einstein Copilot => Open in Builder => Schedule Meeting

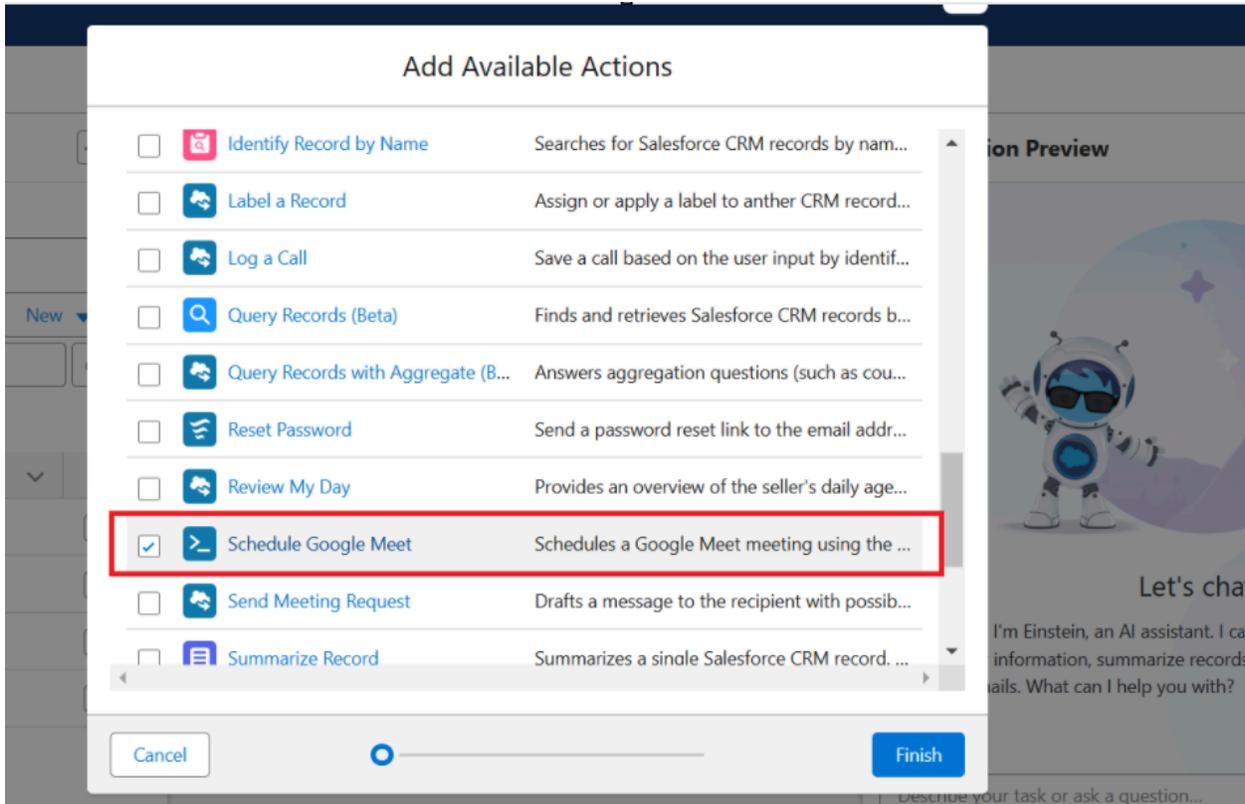
**Step 2:** Go to 'This Topic's Actions'.



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

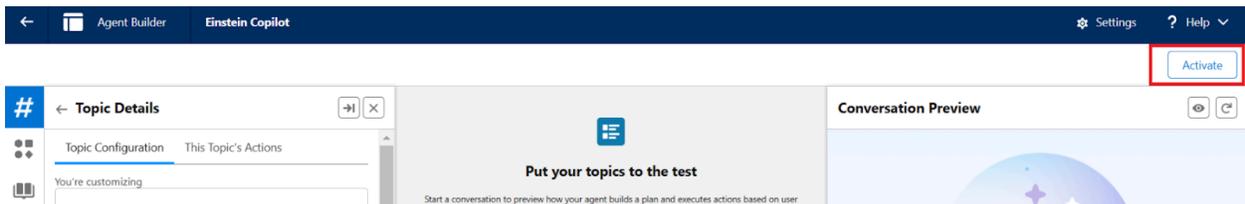


**Step 4:** Select the 'Schedule Google Meet' created in agent actions from the library.



**Step 5:** Click 'Finish'. Repeat till Step 4 to add the topic 'Schedule Zoom Meeting', 'Get Project Members', 'Get Project Details', 'Get Users List' 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 schedule meetings as per user inputs.

Deactivate

### # ← Topic Details

Topic Configuration This Topic's Actions

You're customizing

#### # Schedule Meeting

\* Topic Label

Schedule Meeting

Topic API Name

Schedule\_Meeting

\* Classification Description ⓘ

Engages and interacts with the user to schedule the meetings.

\* Scope ⓘ

Your job is to take input from the users and schedule the meetings.

### 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...