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)
- 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.
- 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:

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.

| 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:

============

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).

| API Name | | | | |
|------------------------|----------|--------|--|--|
| | Туре | Active | | |
| Copilot_for_Salesforce | Employee | | | |

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.

| ← | Agent Builder Einstein Copilot | | | 🕸 Settings |
|------------|--|--------------------------|---|----------------------|
| | | | | |
| # | Topics | × | 8 | Conversation Preview |
| • = • + | Manage the topics assigned to your agent. To make changes your agent must be | New 🔻 | | |
| | deactivated. | S Add from Asset Library | Put your topics to the test | |
| - | Q Search topics | + New Topic | enversation to preview how your agent builds a plan and executes actions based on user interactions. | |
| 8, | 3 items • Sorted by Topic Label(asc) | | J | |

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).

| Setup Home Object | Manager 🗸 | | | |
|--|---|---|--|--|
| Q assets | | A | | |
| Einstein Einstein Generative Al | Hit the Trail with Agents | Customize Agents with Actions | | |
| Agentforce Studio Agentforce Assets | Follow along with an admin as they explore what makes agents tick and launch an agent for their business. | Actions are how an agent gets things done. Learn how to create agent actions tailored to your business needs in the Salesforce Admins Blog. | | |

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

| Object M | nager 🗸 | |
|----------|---|-------------------------------------|
| | 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 setions see 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 Einstein Requests |

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

| | Create an Agent Action | *• 🖿 🚓 ? 🍕 |
|------------|---|------------------------------------|
| Object Man | a | |
| | Connect an existing action | 488671 (<i>. 1997)</i> - 388877 (|
| | 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 | |
| - | Select a type of action | |
| | A, Apex | |
| | St Flow S | ervices and will consume Eins |
| | Prompt Template | |
| ers | 4 | |
| g for? | | ✓ Created By |
| | | Salesforce |
| | Cancel | Salesforce |
| | Create Case Lot a sustemer greate a Standard Eleve | Salasforsa |

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

| | Create an Agent Action | *• |
|------------|--|----------------|
| 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 | |
| Tc | Apex 💌 | |
| Ą | * Reference Action Category | |
| Sc | Select a type of action | Services and w |
| er | Apex REST (Beta) | |
| | Invocable Methods | |
| 57 | | |
| Ag | | ~ Cr |
| 111 | | Sa |
| ~ | | Sa |
| | | Sa |
| 111 | Cancel | Sa |
| R. | | Sa |

Step 6: Select 'Schedule Google Meet' from the Reference Action drop-down.

| | Create an Agent Action | * | |
|-------------|--|----------|--|
| Object Mana | 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. | | + Nev |
| A A | * Reference Action Type Apex Reference Action | | |
| Sc if | Select an action Set Google Meet Meeting IDs for Organizer Get Project Details | Services | and will consu |
| 4 | Get Project Members Get Users List Schedule Google Meet | ~ | Created By Salesforce |
| | Cancel O Next | | Salesforce Salesforce Salesforce |

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 | Age | ent Action | | * | V |
|-----------------------|---|--------------------|---|-----|--------|--------|
| Agent Act | ion Label | | | - | | |
| Schedule | Google Meet | | | | 77355 | -91 C |
| * Agent A | ction Instructions | | | | | |
| Schedu attende | ee names, meeting summary, description, start time offs | etails. set, an | This method accepts meeting parameters such as and duration. It fetches user emails from Salesforce based | | | |
| Inputs | | 0 | utput | | | |
| Attend | dee Emails | | output | | | |
| 1 atte | endeeEmails 🛄 | 1 | output | - 1 | | |
| * Instru | uctions () | | *Instructions | | Servic | es and |
| A lis part | t of Name of attendees Emails for the meeting icipants. | | | | | |
| Data | Туре | | Data Type | | | |
| ligh | ntning_listType | | lightning_listType | | ~ | Cr |
| F | lequire input | 1 | Filter from agent action | | | 5.0 |
| C | Collect data from user | | Show in conversation | | | Sal |
| | | 1 | Output Rendering | | | Sa |
| 2 , | ng Duration | | List | | | Sa |
| dur | ationMinutes | | | | : - | Sa |
| Back | 0 | | O Einis | h | | 6 |
| - Contra | ~ | | | ··· | | |

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.

| | | | | 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 |
| ers | A A if | * Reference Action Select a type of Apex Flow Prompt Tem | Type action | | | | | | · | Ser | vices ar | nd will c | onsum | e Eins |
| g for? | | Gard | | | | | | | | | | Greated Galesford Galesford Galesford | By e e e | |
| | 2 | Cancel | Le | t a customer create | e a Standard | d | Flow | | Next | | 5 | Salesford | e | |

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 | | | |
| 57 | | | | | |
| Ag | | | | \sim | Cr |
| 1 | | | | | Sa |
| ~ | | | | | Sa |
| 2 | | | | | Sa |
| 1 | C | Cancel O Next | | | Sa |
| | | | _ | | Sa |

Step 4: Select 'Schedule Zoom Meeting' from the Reference Action drop-down.

| | Create an Agent Action | |
|----------|--|---------------------|
| Mana | 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. | 4 |
| | * Reference Action Type | |
| A | Apex 💌 | |
| A | * Reference Action | |
| Sc | Select an action Q | Services and will c |
| if | Set Google Meet Meeting IDs for Organizer | |
| | Set Project Details | _ |
| 40 | Set Project Members | |
| | S Get Users List | ✓ Created |
| | | Salesfor |
| | | Salesfor |
| | Schedule Zoom Meeting | Salesfor |
| | | Salesfor |
| | Cancel O Next | Salesfor |

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 | n Agent Action | ſ |
|--------------------|--|--------------------------|------|
| /lana _! | agenda | output | |
| | * Instructions | *Instructions () | 275 |
| | A brief description or purpose of the meeting. | | . 8 |
| | Data Type | Data Type | |
| - | lightning_textType | lightning_listType | |
| A | Require input | Filter from agent action | - 18 |
| A | ✓ Collect data from user | Show in conversation | - 18 |
| 5. | Attendee Emails | Output Rendering | Can |
| if | 2 attendeeEmails | List | Ser |

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.

| | | Create an a | Agent Action | | | * | 8 8 4 | 2 ? | r. |
|-----------|---|---|--|---|--------------------------------|-----------|-------------|---------------|------|
| Object Ma | na | | | | | | | | |
| | | Connect an | existing action | | | ///////// | | <u>S.II.G</u> | 17 |
| | Actions are how an a such as flows or prom | gent gets things done. To create an agen npt templates. Select an action you want t a | t action, start with the fu the agent action to refere gent. | nctionality you already have in ence, and then configure it fo | n Salesforce, r use with an | | + | New Ag | jent |
| | * Reference Action Type | | | | | | 5,25277 | | |
| - | A Select a type of action | on | | | - | | | | |
| | Ay | | | | | | | | |
| | Flow | | | | | Services | and will co | nsume l | Eins |
| | Prompt Template | 2 | | | | | | | |
| ers | 40 | | | | | | | | |
| g for? | | | | | | ~ | Created B | }y | |
| | | | | | | | Salesforce | • | |
| | | | | | | | Salesforce | • | |
| | | | | | | | Salesforce | • | |
| | | | | | _ | | Salesforce | | |
| | Cancel | 0 | | | Next | | Salesforce | | |
| | Create Case | Let a customer create a | Standard | Flow | | | Salesforce | | |

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

| | Create an Agent Action | * |) (|
|----------------|--|------------|-------|
| 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 | | |
| Aq Sc er | * Reference Action Category Select a type of action Apex REST (Beta) Invocable Methods | iervices a | ind w |
| 57 | | | |
| Ag | | \sim | Cr |
| Ĩ | | | Sa |
| | | | Sa |
| | | | Sa |
| | Cancel Next | | Sa |
| | | | Sa |

Step 4: Select 'Get Project Details' from the Reference Action drop-down.

| | Create an Agent Action | |
|-------|---|------------------------------|
| Manag | | |
| | Connect an existing action | 1738-24 (<i>. 7.11)</i> |
| | 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 | |
| A | Apex 💌 | |
| A | * Reference Action | |
| Sc | Select an action Q | Services and will c_{\Box} |
| if | E Get Google Meet Meeting IDs for Organizer | |
| | E Get Project Details | |
| -41 | E Get Project Members | |
| | 2 Get Users List | |
| | Schedule Google Meet | Salesfor |
| | Schedule Zoom Meeting | Salesfor |
| | | Salesfor |
| | | Salesfor |
| | Cancel | Salesfor |

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 | | | | | |
|--------------------|---|--|-------|--|--|--|
| /lana _! | agenda | output | • | | | |
| | * Instructions () A brief description or purpose of the meeting. | * Instructions | | | | |
| | Data Type lightning_textType | Data Type lightning_listType | 15 | | | |
| A, | Require inputCollect data from user | Filter from agent action Show in conversation | ł | | | |
| Sc | Attendee Emails 2 attendeeEmails | Output Rendering List | Servi | | | |

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.

| | Create an Agent Action | | * | ₩ 4 | ? \$ |
|--|---|---|-------------|-------------|-----------|
| Object Ma | na | | | | |
| | Connect an existing action | | 1885-111 | | SMULE |
| 1 | Actions are how an agent gets things done. To create an agent action, start with the functionality such as flows or prompt templates. Select an action you want the agent action to reference, and t agent. | you already have in Salesforce, hen configure it for use with an | | + N | lew Agent |
| | * Reference Action Type | | | | |
| | A Select a type of action | * | | | |
| | Apex | | | | |
| | Sc Flow | | Services an | d will cons | sume Eins |
| | Prompt Template | | | | |
| ers | 4(| | | | |
| g for? | | | ~ 0 | reated By | , |
| | 1 | | S | alesforce | |
| | 1 | | S | alesforce | |
| | | | S | alesforce | |
| Object Mana A A A sk if for? | | | S | alesforce | |
| | Cancel | Next | S | alesforce | |
| | Create Case Let a customer create a Standard Flow | | | alesforce | |

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 |) | Services and v |
| | | ~ C |
| | | Sa |
| | | Sa |
| | | Sa |
| Cancel | ext | Sa |
| | | Sa |

Step 4: Select 'Get Project Members' from the Reference Action drop-down.

| | Create an Agent Action | *• • |
|---------|--|--|
| Mana | 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. | |
| A A | * Reference Action Type Apex * Reference Action | |
| s if | Select an action Q Select Google Meet Meeting IDs for Organizer Select Details | Services and will (|
| 4 | Get Project Members Get Users List Schedule Google Meet Schedule Zoom Meeting | ✓ Created Salesfor Salesfor |
| | Cancel O Next | Salesfor Salesfor Salesfor |

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 | |
|-----|--|--------------------------|-----|
| ana | agenda | output | • |
| 21 | *Instructions | * Instructions () | 211 |
| 1 | A brief description or purpose of the meeting. | | |
| ١. | Data Type | Data Type | |
| | lightning_textType | lightning_listType | |
| A | Require input | Filter from agent action | |
| Ag | ✓ Collect data from user | Show in conversation | 18 |
| Sc | Attendee Emails | Output Rendering | Ser |
| if | 2 attendeeEmails | 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.

| | | Create a | an Agent Action | | | * | • | 2 ? \$ |
|-------------|--|--|--|---|--|------------|--------------------------|------------|
| Object Mana | Actions are how a such as flows or p | Connect In agent gets things done. To create an agent gets things done. To create an agent gets things done and the set of the set | an existing action gent action, start with the ant the agent action to rel agent. | functionality you already he ference, and then configure | ive in Salesforce, it for use with an | | + | New Agent |
| A | * Reference Action T Select a type of Apex | ype action | | | - | | | |
| Sc if | Flow Prompt Tem | plate | | | | Services - | and will co | nsume Eins |
| 3 for? | | | | | | ~ | Created E | 3y |
| | | | | | | | Salesforce Salesforce | • |
| | Cancel | C | Standard | ● Flow | Next | | Salesforce Salesforce | 2 |

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

| | Create an Agent Action | * | E |
|-----------------|---|--------------|----------|
| na _t | 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 | | |
| Тс | agent. * Reference Action Type Apex | | |
| Aq Sc | * Reference Action Category Select a type of action | Services and | d w |
| er | Apex REST (Beta) Invocable Methods | | |
| 57 Ag | | ~ | Cr |
| 111 a | | | Sa Sa |
| 11 IV | Cancel O Next | | Sa Sa |
| | | | 20 |

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

| | Create an Agent Action | |
|-----|---|-------------------|
| ana | | |
| | Connect an existing action | |
| Į. | 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 | |
| A | Apex | |
| A | * Reference Action | |
| Sc | Select an action Q | Services and will |
| if | Set Google Meet Meeting IDs for Organizer | |
| | E Get Project Details | |
| 4(| E Get Project Members | |
| 4 | E Get Users List | ✓ Created |
| | Schedule Google Meet | Salesfor |
| | | Salesfor |
| 1 | Schedule Zoom Meeting | Salesfor |
| - | | Salesfor |
| | Cancel O Next | Salesfor |

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 | | | | |
|-------|--|--------------------------|-------|--|--|
| /lana | agenda | output | • | | |
| | *Instructions | * Instructions | 77:N | | |
| | A brief description or purpose of the meeting. | | | | |
| | Data Type | Data Type | | | |
| | lightning_textType | lightning_listType | | | |
| A | Require input | Filter from agent action | | | |
| A | ✓ Collect data from user | Show in conversation | | | |
| S. | Attendee Emails | Output Rendering | Soni | | |
| if | 2 attendeeEmails | List | bervi | | |

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

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

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

| Agent Builder Einstein Copilot | |
|--|---|
| | |
| ← Topic Details | × IF |
| Topic Configuration This Topic's Actions | |
| You're customizing | Put your topics to the test |
| # Schedule Meeting | interactions. |
| * Topic Label | |
| Schedule Meeting | |
| | Agent Builder Einstein Copilot ← Topic Details Topic Configuration This Topic's Actions You're customizing This Topic Label * Topic Label Schedule Meeting |

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

| ~ | Agent Builder Einstein Copilot | |
|--------------|--|---|
| | | |
| # | ← Topic Details | |
| • = | Topic Configuration This Topic's Actions | |
| | Manage the actions assigned to your topic. To add or remove actions, your agent must be deactivated. | Start a conversation to preview how your agent builds a plan and executes actions based on user interactions. |
| 8 | Q Search actions | set Library |
| ¢ | 5 items • Sorted by Agent A + Add Action | |

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.

| ÷ | Agent Builder Einstein Copilot | | 🕸 Settings | ? Help ∨ |
|------------|--|---|----------------------|------------------|
| | | | | Activate |
| # | ← Topic Details | | Conversation Preview | • C ⁴ |
| 0 H 0 + | Topic Configuration This Topic's Actions | · 🖆 | | |
| (88) | You're customizing | Put your topics to the test | · · · | |
| Ļ | | Start a conversation to preview how your agent builds a plan and executes actions based on user | | |



