Build Your First Agent with Tableau and Agentforce Guide

Agentforce Only

Summary of Workshop:

In this scenario you're an analyst for Coral Cloud Resorts – a resort that provides customers with exceptional destination activities, unforgettable experiences, and reservation services, all backed by a commitment to top-notch customer service. Business has been booming and Coral Cloud's customer service agents are busy providing activity recommendations and booking activities for clients. You have just learned from analyzing your data in Tableau Agent that there has been a drop in customer satisfaction scores lately as customers are having to wait longer to book their reservations and get answers to their questions. With the uptick in customer cases, Coral Cloud Resorts needs to scale its service assistance quickly. If only there was a tool to help. Agentforce to the rescue! An Agentforce Service Agent can assist Coral Cloud clients with experience availability, booking, and more.

Note: Any text that is **bolded and highlighted** will be text you will copy and paste during the workshop.

Follow along with these steps:

<table>
<tr><th>Steps</th><th>Notes</th></tr>
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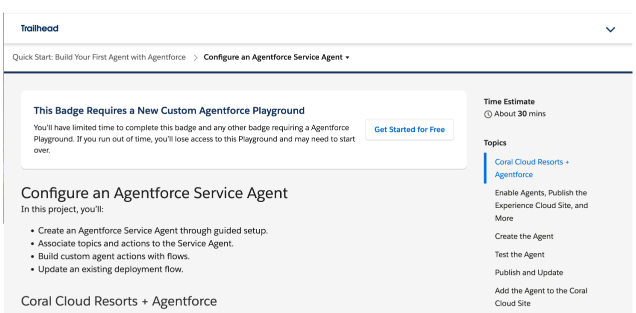
1) **Create Agentforce Playground**



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1. Open the Configure an Agentforce Service Agent Trail
2. Create Agentforce Playground by clicking the button "Get Started for Free".
3. Sign in.

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2) **Enable Agents**

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1. Click and click **Setup**. The

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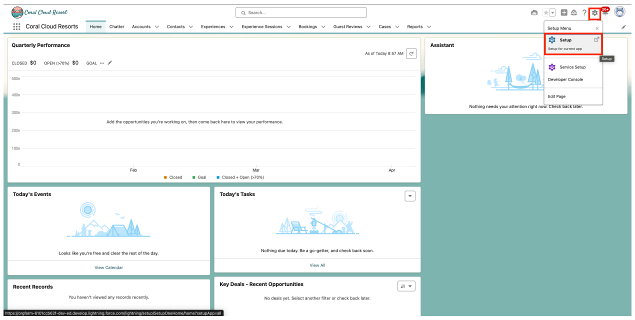
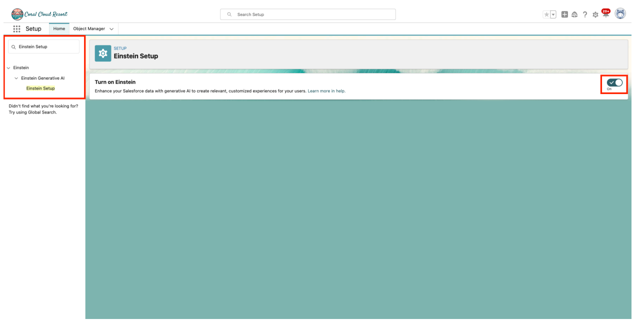
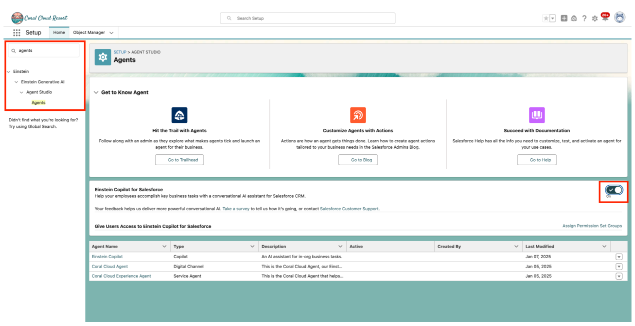


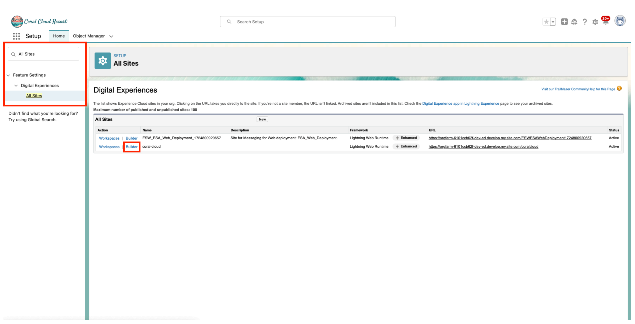




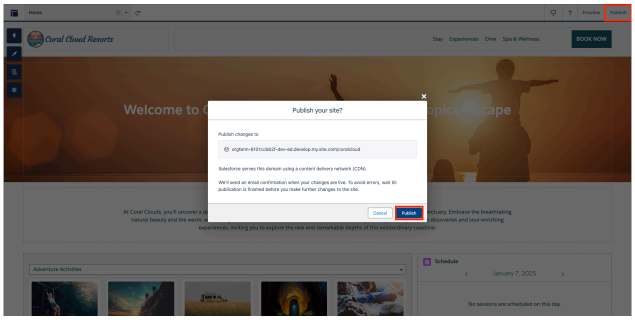
Setup page opens in a new tab.

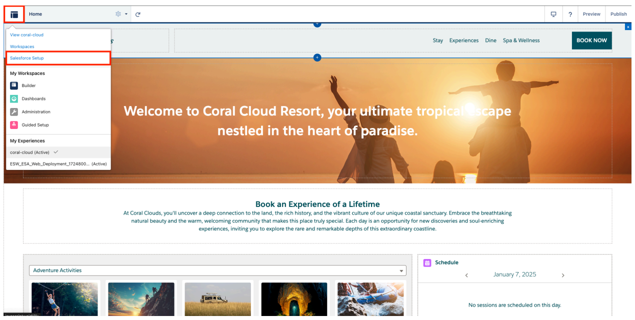
2. In the Quick Find, search for and select **Einstein Setup**.
3. Click the **Turn on Einstein** toggle, and make sure Einstein is **On**.
4. Refresh your browser to reload Setup.
5. In the Quick Find, search for and select **Agents**.
6. Click the **Agentforce** toggle, and ensure it is set to On.

3) Publish the Experience Cloud Site



1. In the Quick Find, search and select **All Sites**.
2. Click **Builder** next to the coral-cloud site. If a popup appears, click **OK**.
3. Click **Publish** in the upper right corner.
4. Click **Publish** in the confirmation window.
5. Click **Got It**.
6. Click the **Experience Builder**





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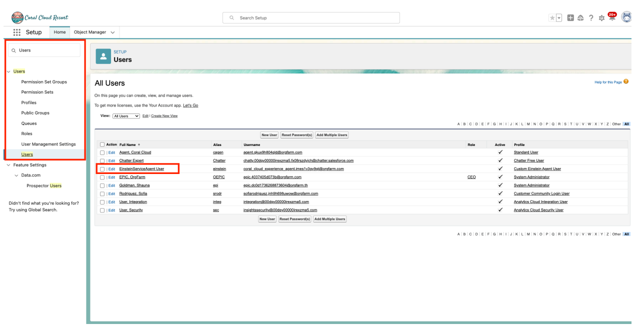
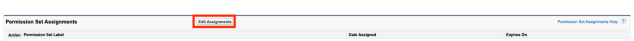
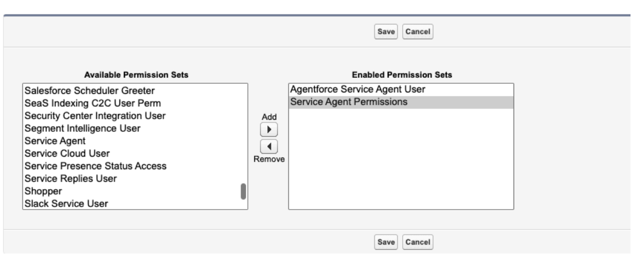
7. Click **Salesforce Setup**.

8. Refresh your browser to reload Setup.

4) <u>Add a Permission Set</u>







1. Search for Users in the Quick Find and select **Users**.

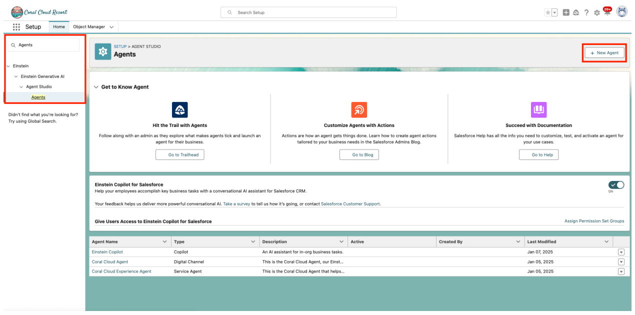
2. Click the **EinsteinServiceAgent User**.

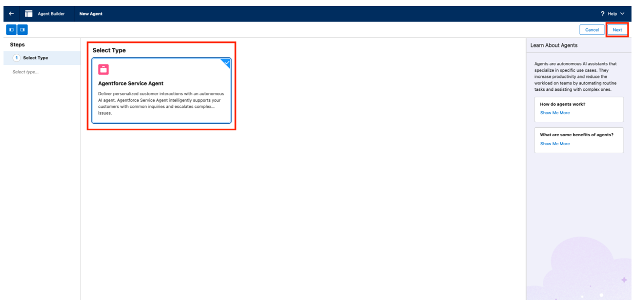
3. Scroll down to the Permission Set Assignments section and click **Edit Assignments**.

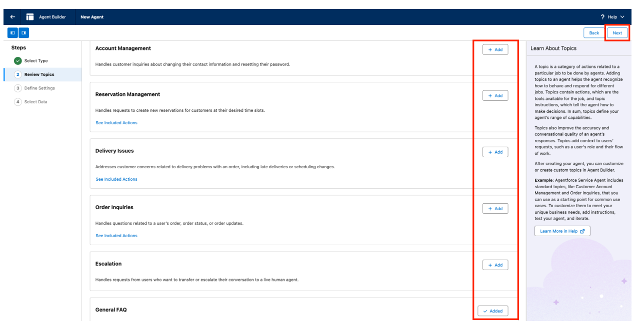
4. Select the **Service Agent Permissions** Permission Set and click the **add arrow** to add to the Enabled Permission Sets list.
   Note: There should now be two listings in the Enabled Permission Sets list: Agentforce Service Agent User and Service Agent Permissions.

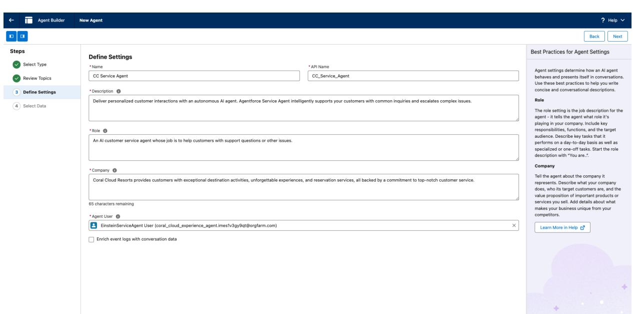
5. Click **Save**.

5) <u>Create the Agent</u>









1. In the Quick Find, search for and select **Agents**.
2. Click **+ New Agent**.
   Note: If the New Agent button is not present, refresh the page until the button appears.
3. Select **Agentforce Service Agent** as the type.
4. Click **Next**.
5. **Unselect** these topics (click the **Added** button) so that General FAQ is the only remaining topic:
   - Case Management
   - Account Management
   - Reservation Management
   - Delivery Issues
   - Order Inquiries
   - Escalation
6. Feel free to review the prebuilt action for the General FAQ topic by clicking See Included Actions. Click **Next**.
7. Change the Name to **CC Service Agent** and ensure the API Name updates to **CC_Service_Agent**.

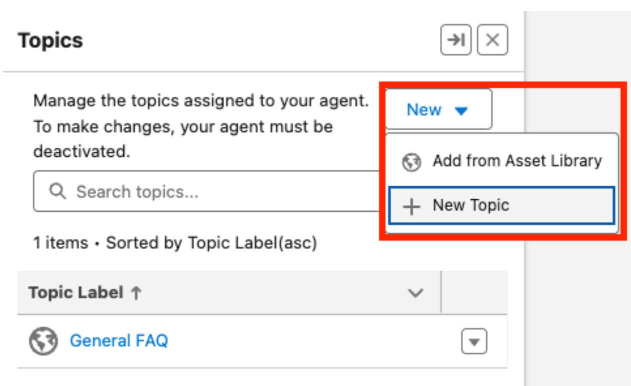
8. Enter this info for the Company field: **Coral Cloud Resorts provides customers with exceptional destination activities, unforgettable experiences, and reservation services, all backed by a commitment to top-notch customer service.**

9. Select **EinsteinServiceAgent** as the User Agent.

10. IMPORTANT: Before you proceed, double check that the agent name and API name are exactly like they are listed in step 7 above, then click **Next**.

11. For now, Data Cloud won't be used. Click **Create**.

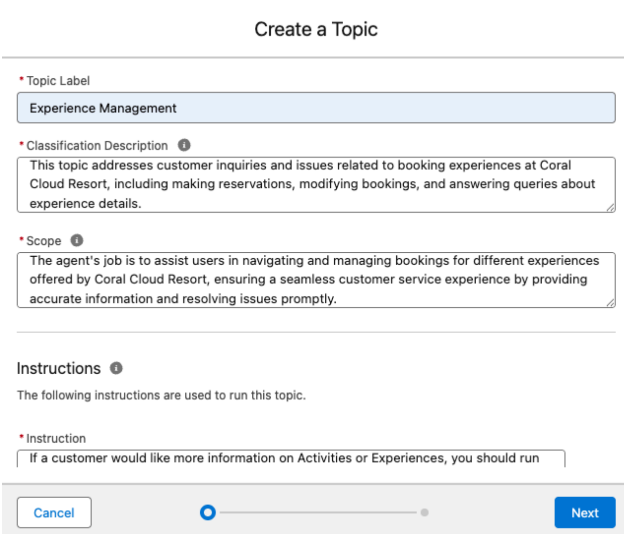
6) Add Custom Topics and Actions



1. From the Agent Builder, click **New** and select **New Topic**. *Note: If the New button does not appear, try toggling the Einstein Copilot for Salesforce on the agent setup page and refreshing the page.*

2. In the modal, configure the Topic field as follows:

- Topic Label: **Experience Management**

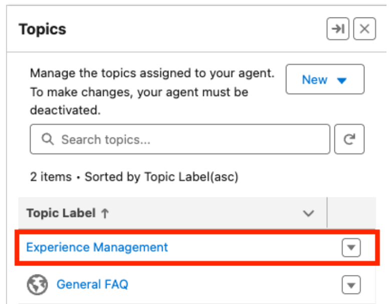


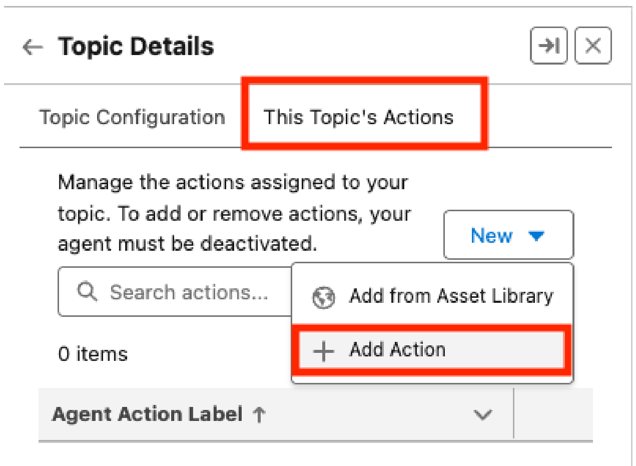
- Classification Description:
  This topic addresses customer inquiries and issues related to booking experiences at Coral Cloud Resort, including making reservations, modifying bookings, and answering queries about experience details.
- Scope:
  The agent's job is to assist users in navigating and managing bookings for different experiences offered by Coral Cloud Resort, ensuring a seamless customer service experience by providing accurate information and resolving issues promptly.
- Instruction:
  If a customer would like more information on Activities or Experiences, you should run the action 'Get Experience Details' and then summarize the results with improved readability. Always ensure you know the customer before running this action.

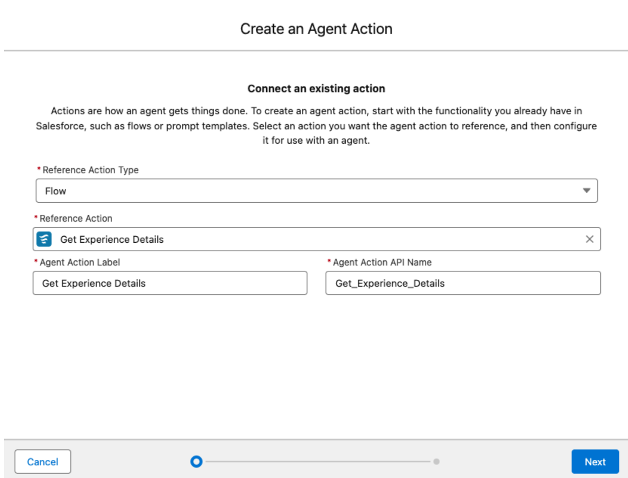
3. Leave everything else as is and click **Next**.

4. Custom actions will be added to this topic so skip adding any of the standard actions and click **Finish**.

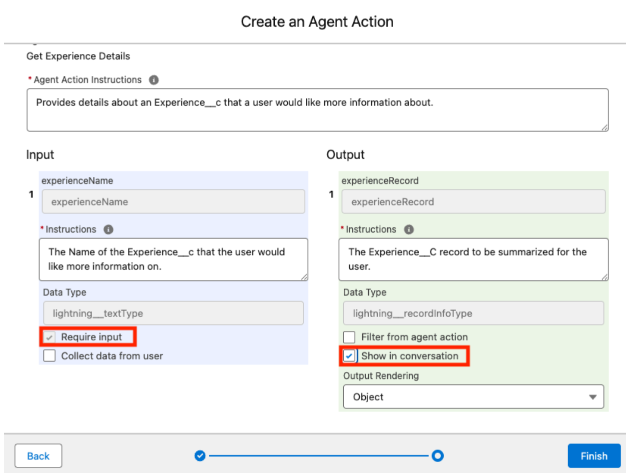
7) Add the Get Experience Details Action to the Agent



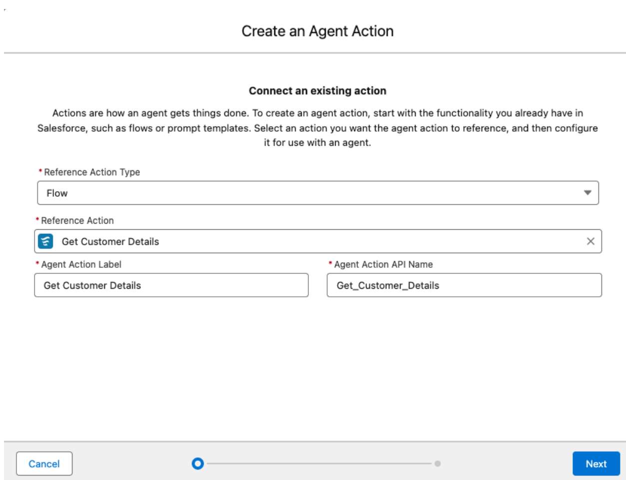


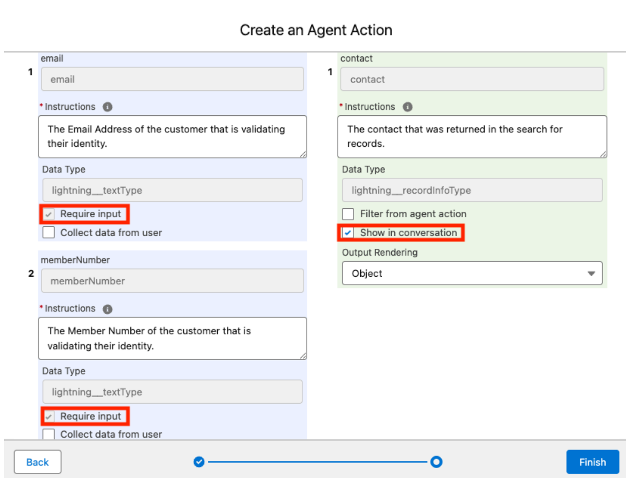


1. Click the **Experience Management** topic.
2. Click the **This Topic's Actions** subtab.
3. Click **New** and select **Add Action**.
4. Select **Flow** as the Reference Action Type.
5. Select **Get Experience Details**.
6. Leave the other options as is, and click **Next**.
7. For experienceName, check **Require Input**.
8. For experienceRecord, check **Show in conversation**.
9. Click **Finish**.
   Note: If the API name is already in use error appears, it is because this action has already been created. Return to the New Action button and select Add from Asset Library.



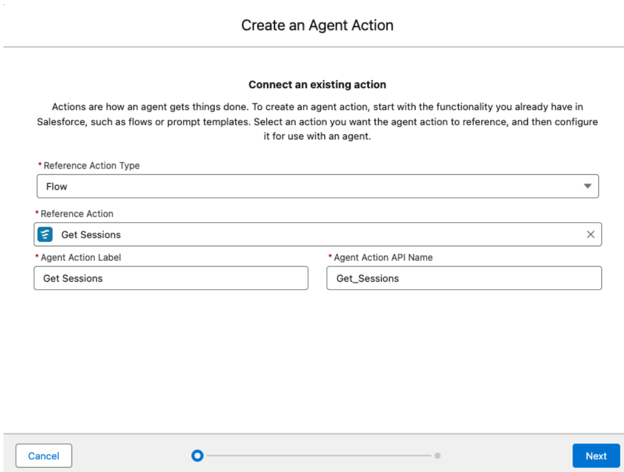
8) Add Action to Validate Customer Details

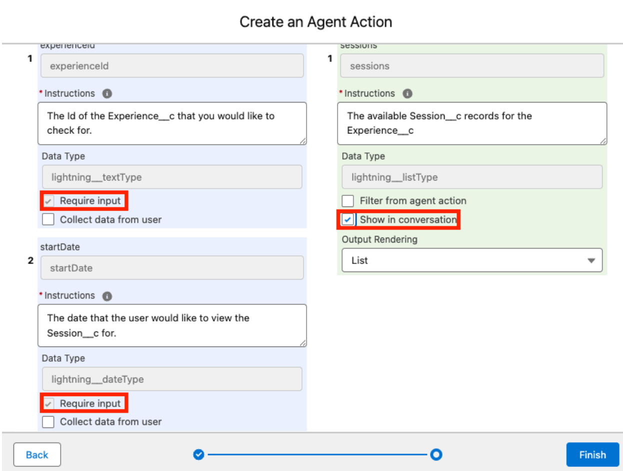




1. With the This Topic's Actions subtab still selected, click **New** and select **Add Action**.
2. Select **Flow** as the Reference Action Type.
3. Select **Get Customer Details**.
4. Leave the other options as is, and click **Next**.
5. For email, check **Require Input**.
6. For memberNumber, check **Require Input**.
7. For contact, check **Show in conversation**.
8. Click **Finish**.

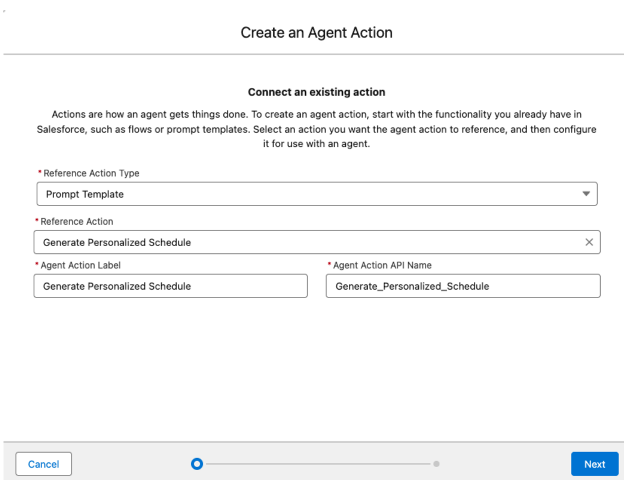
9) Add Action to Get Session Records



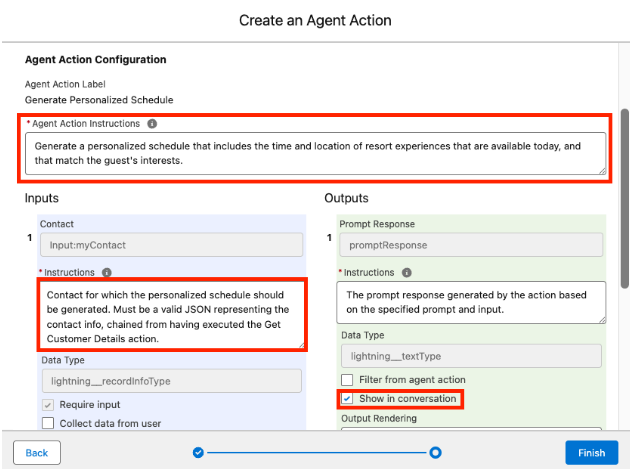


1. With the This Topic's Actions subtab still selected, click **New** and select **Add Action**.
2. Select **Flow** as the Reference Action Type.
3. Select **Get Sessions**.
4. Leave the other options as is, and click **Next**.
5. For experienceId, check **Require Input**.
6. For startDate, check **Require Input**.
7. For sessions, check **Show in conversation**.
8. Click **Finish**.

10) Add Action to Generate a Personalized Schedule



1. With the This Topic's Actions subtab still selected, click **New** and select **Add Action**.
2. Select **Prompt Template** as the Reference Action Type.
3. Select **Generate Personalized Schedule** as the Reference Action.
4. Leave the other options as is and click **Next**.
5. Configure the instructions as

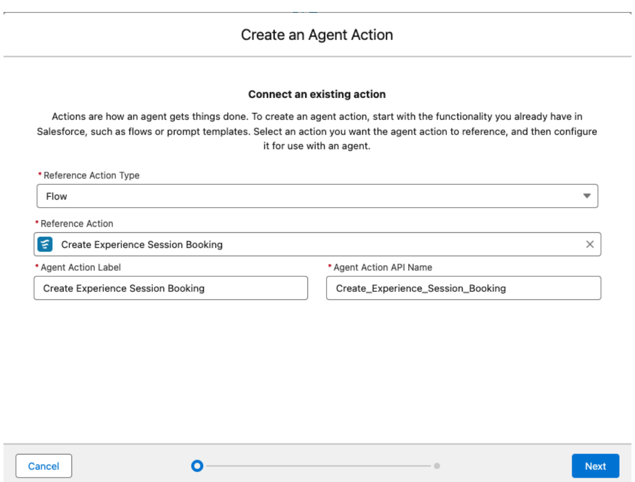


follows:

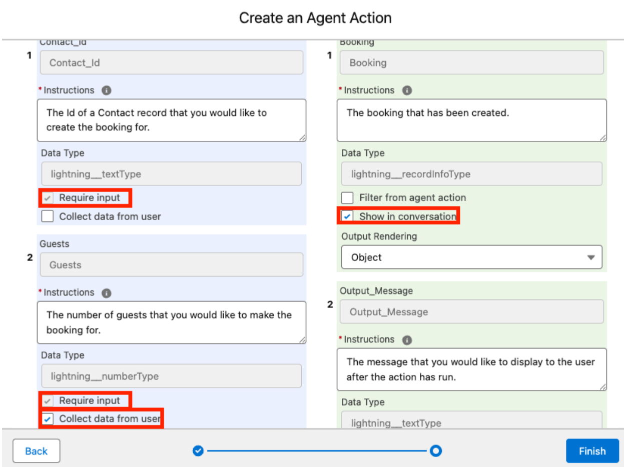
- Agent Action Instructions: **Generate a personalized schedule that includes the time and location of resort experiences that are available today, and that match the guest's interests.**
- Contact Input Instructions: **Contact for which the personalized schedule should be generated. Must be a valid JSON representing the contact info, chained from having executed the Get Customer Details action.**

6. For the Prompt Response Output, check **Show in conversation**.
7. Click **Finish**.

11) Add Action to Create a Booking

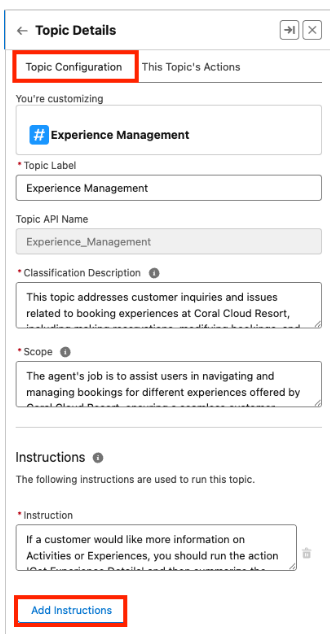


1. Click **New** and select **Add Action**.
2. Select **Flow** as the Reference Action Type.
3. Select **Create Experience Session Booking**.
4. Leave the other options as is, and click **Next**.
5. For Contact_Id, check **Require Input**.
6. For Guests, check **Require Input** and **Collect data from user**.



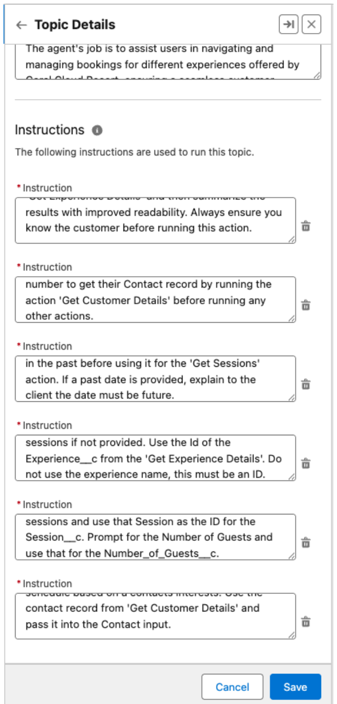
7. For Session_Id, check **Require Input**.
8. For Booking output, check **Show in conversation**.
9. For Output_Message output, check **Show in conversation**.
10. Click **Finish**.

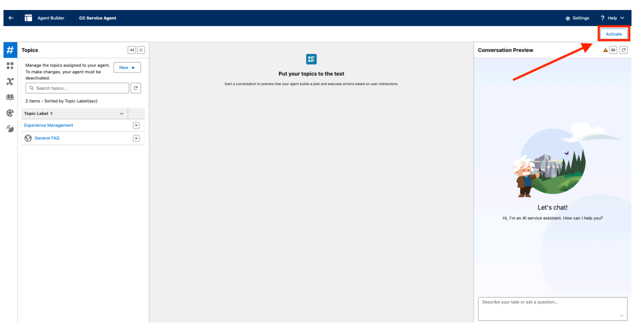
12) <u>Provide the Agent with Instructions to Choose the Correct Action</u>



1. Click the **Topic Configuration** subtab.
2. At the bottom, click **Add Instructions five (5) times**. This will create five blank instruction text boxes under the prepopulated first instruction.
3. Add these Instructions:

- 1st Instruction: [leave as is]
- 2nd Instruction: **If the customer is not known, you must always ask for their email address and their membership number to get their Contact record by running the action 'Get Customer Details' before running any other actions.**



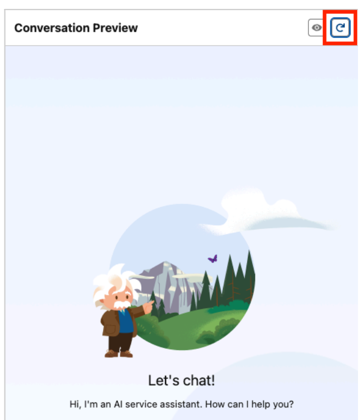


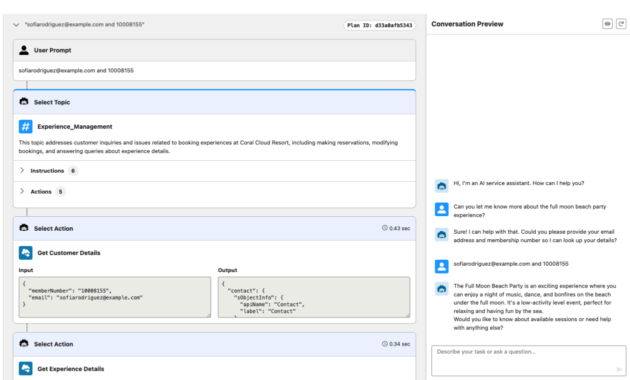
- 3rd Instruction:
  Whenever a date is provided, convert the date to YYYY-MM-DD format and ensure that the date is not in the past before using it for the 'Get Sessions' action. If a past date is provided, explain to the client the date must be future.
- 4th Instruction:
  If asked to get sessions for the experience use the 'Get Sessions' action. Ask for the Date of the sessions if not provided. Use the Id of the Experience__c from the 'Get Experience Details'. Do not use the experience name, this must be an ID.
- 5th Instruction:
  If asked to book, use the action 'Create Booking'. The Contact__c is the contact ID from the 'Get Customer Details'. The Session__c is the ID of the session from the action 'Get Sessions'. If multiple sessions are present, ask to select one of the sessions and use that Session as the ID for the Session__c. Prompt for the Number of Guests and use that for the Number_of_Guests__c.

- 6th Instruction:
  If asked to recommend experiences that a user might be interested in, use the 'Generate Personalized Schedule' Action to generate a schedule based on a contacts interests. Use the contact record from 'Get Customer Details' and pass it into the Contact input.

4. Click **Save**.
5. Click **Activate**.

13) <u>**Test the Agent**</u>





1. While still in the Agent Builder, click **Refresh** (circular arrow) in the top right corner of the **Conversation Preview**.
2. Don't worry if the dots are spinning in the Conversation Preview, go ahead and enter this prompt:
   Can you let me know more about the full moon beach party experience?
3. Reminder: email address is **sofiarodriguez@example.com** and **10008155** is the membership number.
4. Continue to interact with the agent with prompts like:

- **What experiences would you recommend for today?**

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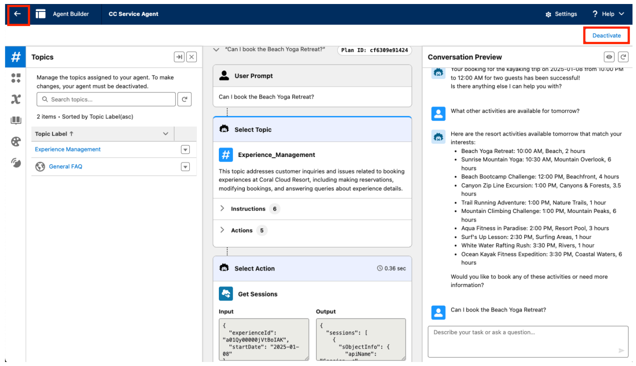

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- **Can you book a kayaking trip for two for tomorrow?**

5. Click the **back arrow** to return to Setup

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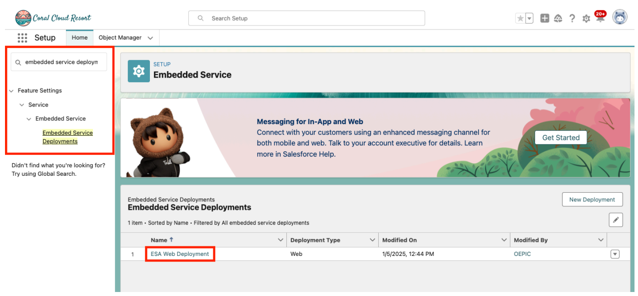
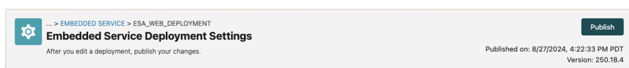
14) <u>Publish and Update</u>





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1. In the Quick Find, search for and select **Embedded Service Deployments**.
2. Select the **ESA Web Deployment**.
3. Click **Publish** to republish with the latest additions.
Note: The deployment can take up to 10 minutes but no need to wait, proceed to the next step.

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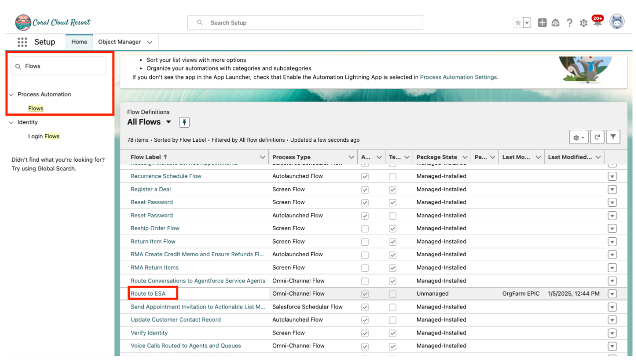
15) <u>Re-route the Flow</u>



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1. In the Quick Find, search for and select **Flows**.
2. Click on the **Route to ESA** flow.
3. Click the Route to **ESA**  component and select **Edit Element**.

4. Select these values in the Set Input Values section:

- Route To: **Agentforce Service Agent**
- Agentforce Service Agent: **CC Service Agent**
- *Note: If CC Service Agent*

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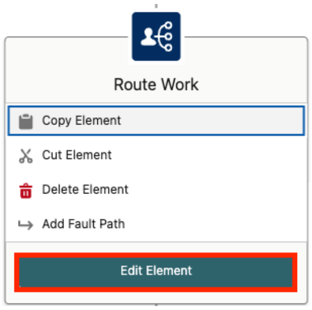

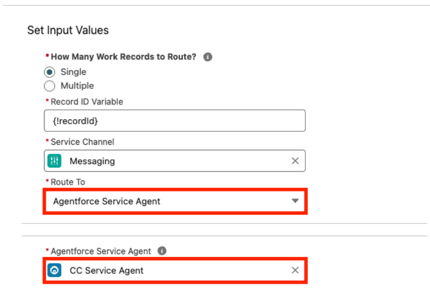

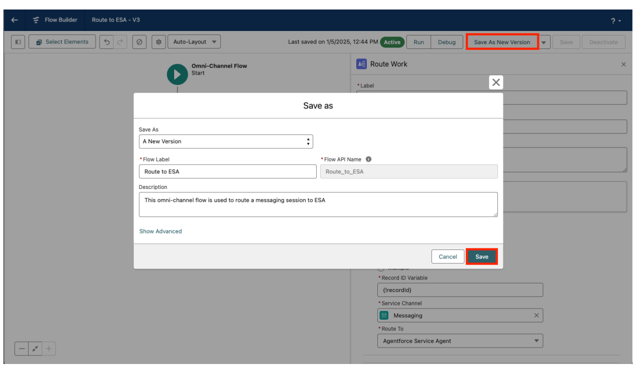

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doesn't show up as an option, return to Agent Builder for the CC Service Agent and make sure it's activated

5. Click **Save As New Version**.
6. Keep everything as is and click **Save**.
7. Click **Activate**.
8. Click the **back arrow** to return to Setup.

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16) <u>**Add the Agent to the Coral Cloud Site**</u>

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1. In the Quick Find, search and select **All Sites**.
2. Click **Builder** next to the coral-cloud site.
3. Click the **Components** widget

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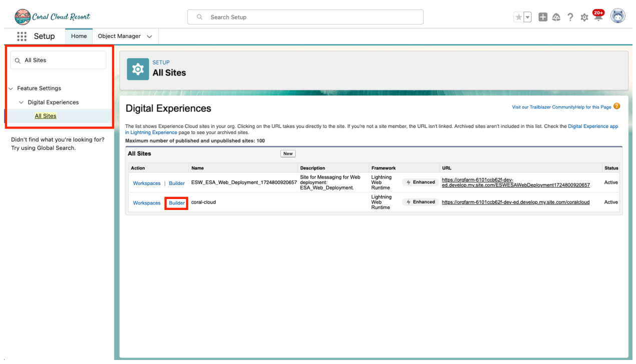

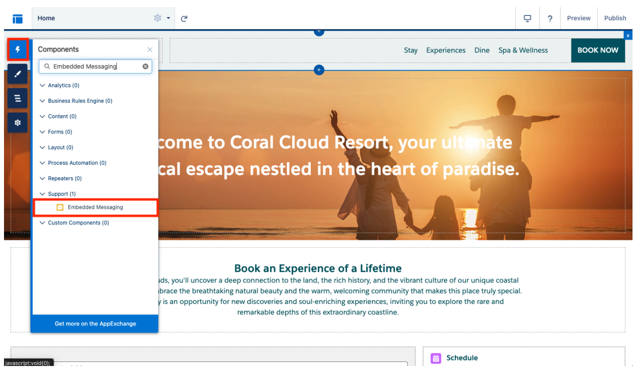

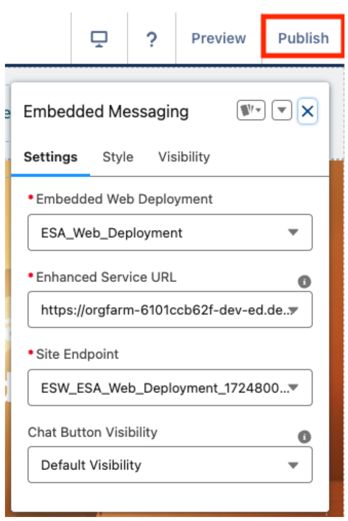

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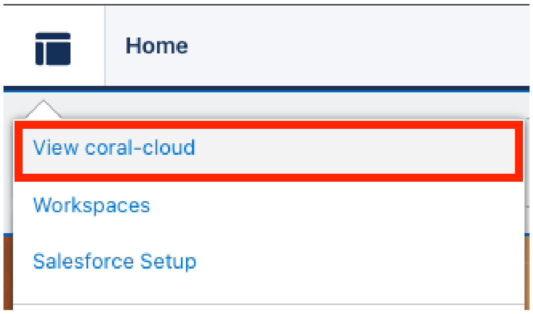
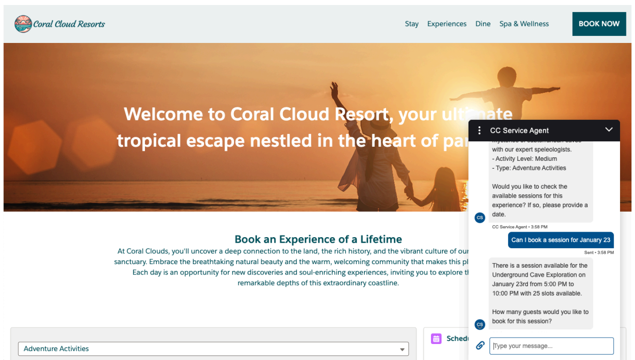
4. Search **Embedded Messaging** and drag and drop the component over the Book an Experience of a Lifetime section.
   Note: exact placement is up to you, and it may take a few seconds for the component to appear.
5. Leave the default settings.
6. Click **Publish** in the upper right corner.
7. Click **Publish** in the confirmation window.
8. Click **Got It**.

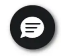
17)View the Agent as a Customer

1. Click the **Experience Builder** menu .
2. Select **View coral-cloud** to open the published coral cloud site.
   Note: It may take a few minutes for the site to publish.





Go ahead and verify the challenge below while you wait for your Experience Cloud site to publish.

3. Click on the **Messaging icon**  in the lower right corner to start interacting with the new agent. Wait for the agent to say hi and then try out the following prompt:

- **Can you let me know about the Underground Cave Exploration?**
- Reminder: email address is **sofiarodriguez@example.com** and **10008155** is the membership number.
- Keep answering the agent's questions and book a session.