



# Build Your First Agent with Tableau and Agentforce Guide

Agentforce Only

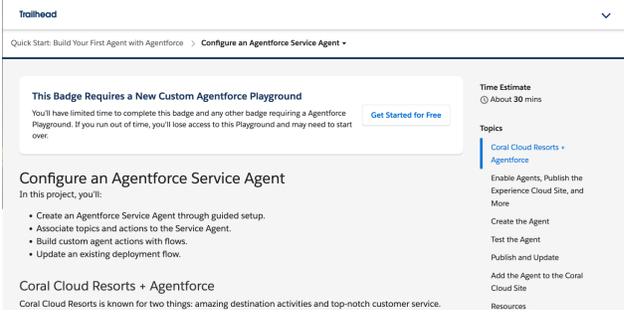


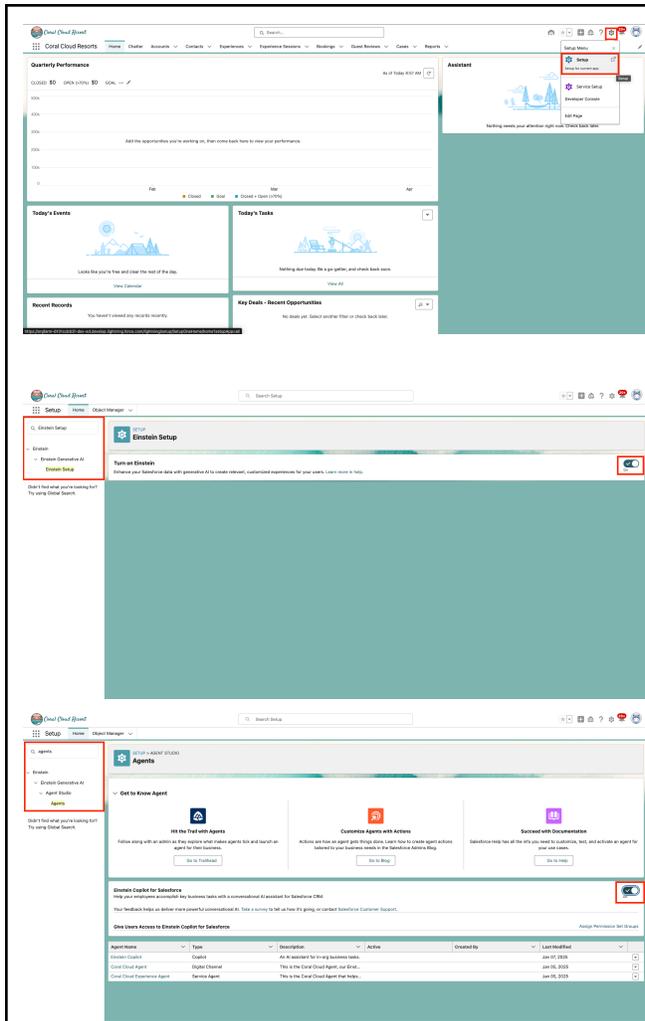
## Summary of Workshop:

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:

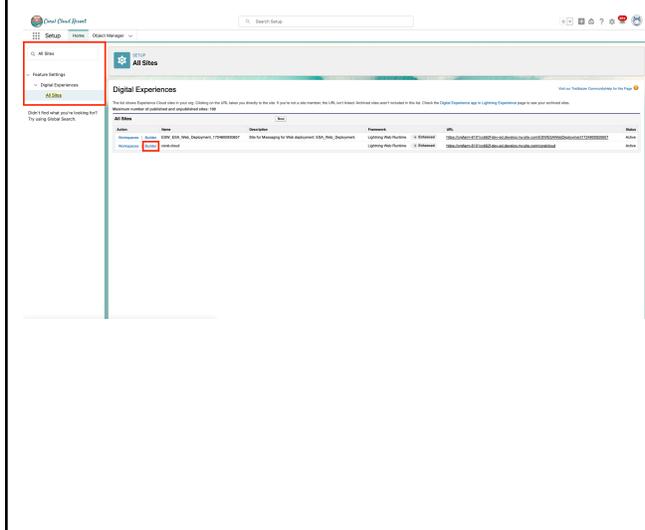
Steps	Notes
<p><b>1) <u>Create Agentforce Playground</u></b></p> 	<ol style="list-style-type: none"><li>1. Open the <a href="#">Configure an Agentforce Service Agent Trail</a></li><li>2. Create Agentforce Playground by clicking the button “Get Started for Free”.</li><li>3. Sign in.</li></ol>
<p><b>2) <u>Enable Agents</u></b></p>	<ol style="list-style-type: none"><li>1. Click  and click <b>Setup</b>. The</li></ol>



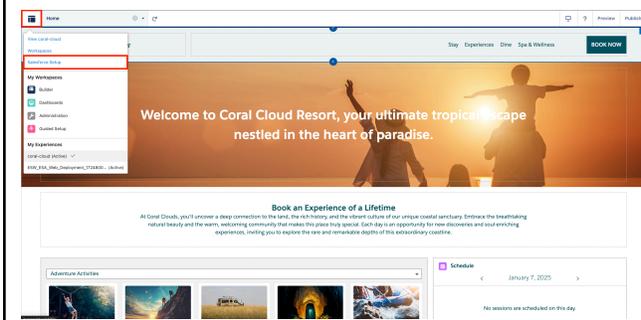
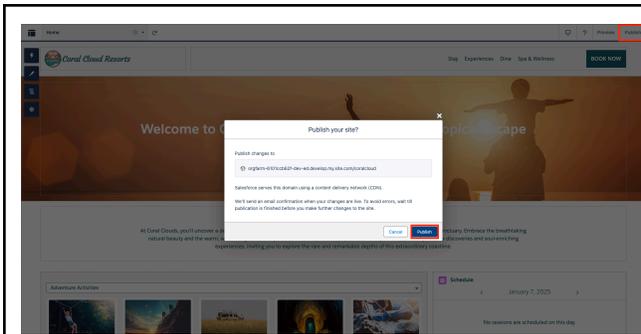
Setup page opens in a new tab.

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



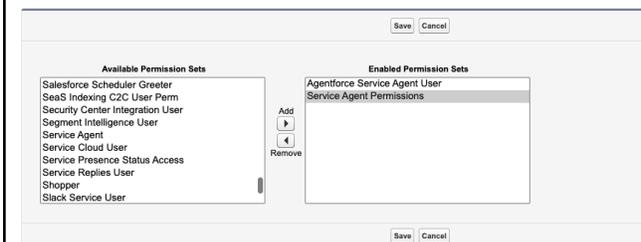
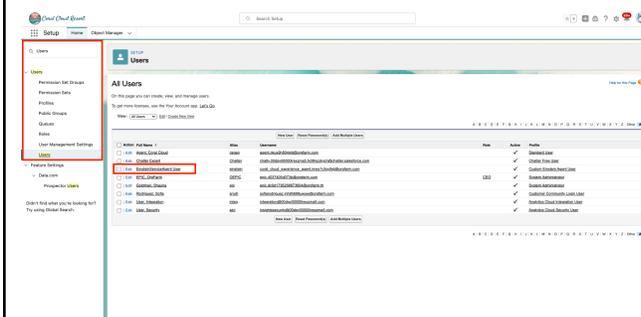
1. In the Quick Find, search and select **All Sites**.
2. Click **Builder** next to the coral-cloud site. If a popup appears, click **OK**.
3. Click **Publish** in the upper right corner.
4. Click **Publish** in the confirmation window.
5. Click **Got It**.
6. Click the **Experience Builder**



menu 

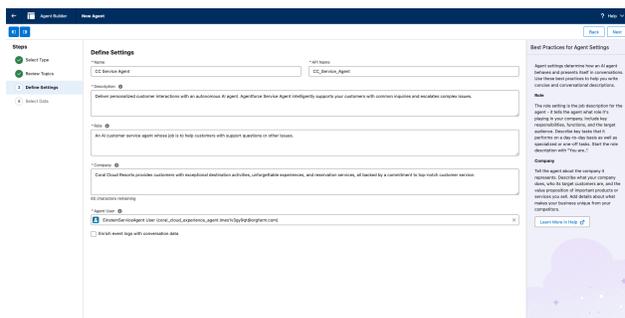
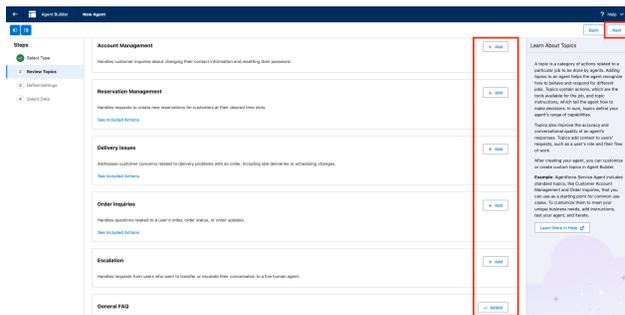
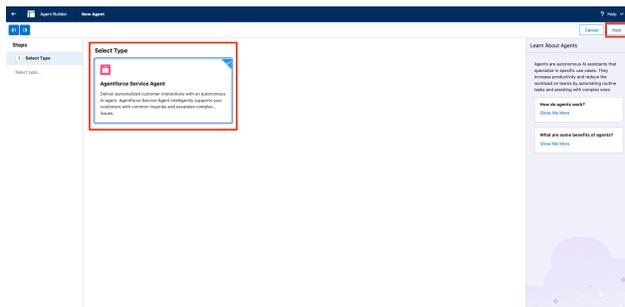
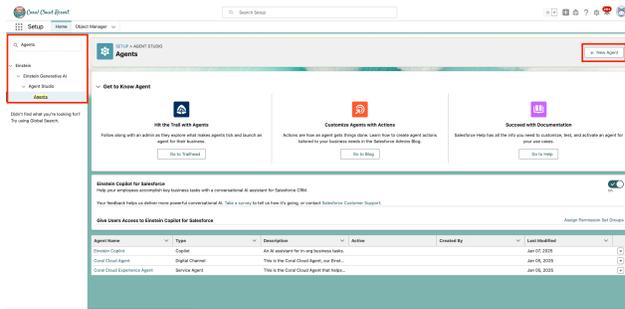
7. Click **Salesforce Setup**.
8. Refresh your browser to reload Setup.

#### 4) **Add a Permission Set**



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) Create the Agent



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

**Topics** [→] [×]

Manage the topics assigned to your agent. To make changes, your agent must be deactivated.

[New ▼]

⊕ Add from Asset Library

⊕ New Topic

🔍 Search topics...

1 items • Sorted by Topic Label(asc)

Topic Label ↑

🌐 General FAQ

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**

### Create a Topic

---

**\* 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.

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**\* 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.

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**Instructions** ⓘ

The following instructions are used to run this topic.

---

**\* Instruction**

If a customer would like more information on Activities or Experiences, you should run

---

○

- **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

**Topics** [Share] [Close]

Manage the topics assigned to your agent. To make changes, your agent must be deactivated. [New]

Search topics...

2 items · Sorted by Topic Label(asc)

Topic Label ↑

- Experience Management** [Dropdown]
- General FAQ [Dropdown]

### ← Topic Details [Share] [Close]

Topic Configuration

**This Topic's Actions**

Manage the actions assigned to your topic. To add or remove actions, your agent must be deactivated. [New]

Search actions...

[Add from Asset Library]

0 items

**+ Add Action**

Agent Action Label ↑

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  
Flow

\* Reference Action  
Get Experience Details

\* Agent Action Label  
Get Experience Details

\* Agent Action API Name  
Get\_Experience\_Details

Cancel

Next

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.*

Create an Agent Action

Get Experience Details

\* Agent Action Instructions ⓘ

Provides details about an Experience\_\_c that a user would like more information about.

Input

1 experienceName

experienceName

\* Instructions ⓘ

The Name of the Experience\_\_c that the user would like more information on.

Data Type

lightning\_\_textType

Require input

Collect data from user

Output

1 experienceRecord

experienceRecord

\* Instructions ⓘ

The Experience\_\_C record to be summarized for the user.

Data Type

lightning\_\_recordInfoType

Filter from agent action

Show in conversation

Output Rendering

Object

Back ○ ○ Finish

## 8) Add Action to Validate Customer Details

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

Flow

\* Reference Action

Get Customer Details

\* Agent Action Label

Get Customer Details

\* Agent Action API Name

Get\_Customer\_Details

Cancel ○ ○ Next

Create an Agent Action

email

1 email

\* Instructions ⓘ

The Email Address of the customer that is validating their identity.

Data Type

lightning\_\_textType

Require input

Collect data from user

memberNumber

2 memberNumber

\* Instructions ⓘ

The Member Number of the customer that is validating their identity.

Data Type

lightning\_\_textType

Require input

Collect data from user

contact

1 contact

contact

\* Instructions ⓘ

The contact that was returned in the search for records.

Data Type

lightning\_\_recordInfoType

Filter from agent action

Show in conversation

Output Rendering

Object

Back ○ ○ Finish

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

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  
Flow

\*Reference Action  
Get Sessions

\*Agent Action Label  
Get Sessions

\*Agent Action API Name  
Get\_Sessions

Cancel Next

---

Create an Agent Action

**experienceId**

1  
experienceId

\*Instructions  
The Id of the Experience\_\_c that you would like to check for.

Data Type  
lightning\_\_textType

Require input

Collect data from user

**startDate**

2  
startDate

\*Instructions  
The date that the user would like to view the Session\_\_c for.

Data Type  
lightning\_\_dateType

Require input

Collect data from user

Back Finish

**sessions**

1  
sessions

\*Instructions  
The available Session\_\_c records for the Experience\_\_c

Data Type  
lightning\_\_listType

Filter from agent action

Show in conversation

Output Rendering  
List

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

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  
Prompt Template

\*Reference Action  
Generate Personalized Schedule

\*Agent Action Label  
Generate Personalized Schedule

\*Agent Action API Name  
Generate\_Personalized\_Schedule

Cancel Next

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

Create an Agent Action

**Agent Action Configuration**

Agent Action Label  
Generate Personalized Schedule

\* 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.

**Inputs**

1 Contact  
Input:myContact

\* 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.

Data Type  
lightning\_\_recordInfoType

Require input  
 Collect data from user

**Outputs**

1 Prompt Response  
promptResponse

\* Instructions ⓘ  
The prompt response generated by the action based on the specified prompt and input.

Data Type  
lightning\_\_textType

Filter from agent action  
 Show in conversation

Output Rendering

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

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  
Flow

\* Reference Action  
Create Experience Session Booking

\* Agent Action Label  
Create Experience Session Booking

\* Agent Action API Name  
Create\_Experience\_Session\_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**.

Create an Agent Action

1 Contact\_Cid

Contact\_Id

\* Instructions

The Id of a Contact record that you would like to create the booking for.

Data Type

lightning\_\_textType

Require input

Collect data from user

2 Guests

Guests

\* Instructions

The number of guests that you would like to make the booking for.

Data Type

lightning\_\_numberType

Require input

Collect data from user

1 booking

Booking

\* Instructions

The booking that has been created.

Data Type

lightning\_\_recordInfoType

Filter from agent action

Show in conversation

Output Rendering

Object

2 Output\_Message

Output\_Message

\* Instructions

The message that you would like to display to the user after the action has run.

Data Type

lightning\_\_textType

○
○

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) Provide the Agent with Instructions to Choose the Correct Action**

← Topic Details → | X

This Topic's Actions

You're customizing

**# Experience Management**

\* Topic Label

Experience Management

Topic API Name

Experience\_Management

\* Classification Description

This topic addresses customer inquiries and issues related to booking experiences at Coral Cloud Resort.

\* Scope

The agent's job is to assist users in navigating and managing bookings for different experiences offered by

Instructions

The following instructions are used to run this topic.

\* Instruction

If a customer would like more information on Activities or Experiences, you should run the action

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.**

← Topic Details

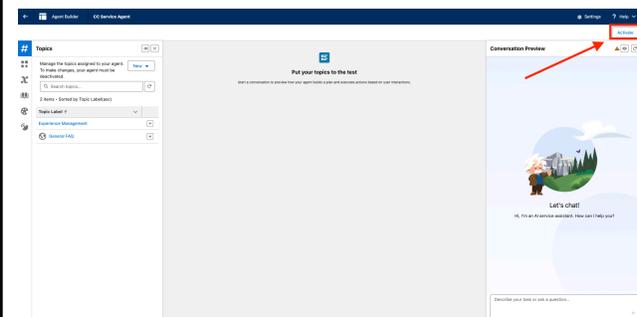
The agent's job is to assist users in navigating and managing bookings for different experiences offered by

Instructions

The following instructions are used to run this topic.

- \*Instruction  
results with improved readability. Always ensure you know the customer before running this action.
- \*Instruction  
number to get their Contact record by running the action 'Get Customer Details' before running any other actions.
- \*Instruction  
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.
- \*Instruction  
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.
- \*Instruction  
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.
- \*Instruction  
contact record from 'Get Customer Details' and pass it into the Contact input.

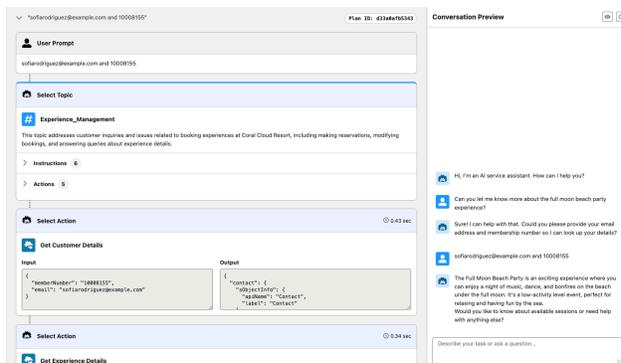
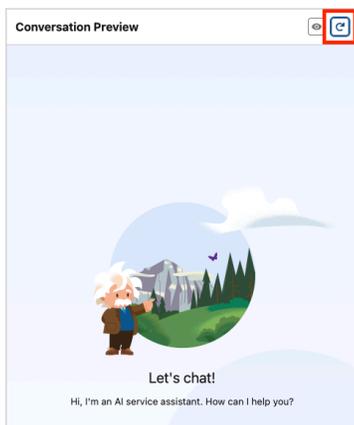
Cancel Save



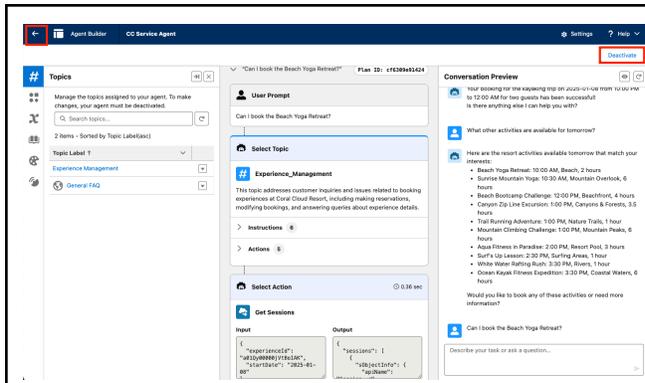
- 3rd Instruction:  
Whenever a date is provided, convert the date to YYYY-MM-DD format and ensure that the date is not in the past before using it for the 'Get Sessions' action. If a past date is provided, explain to the client the date must be future.
- 4th Instruction:  
If asked to get sessions for 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) Test the Agent



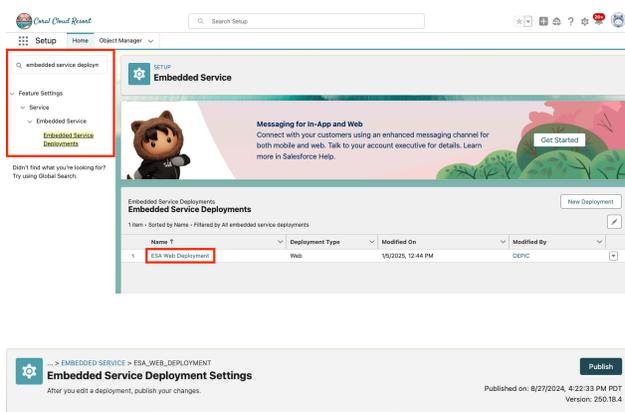
1. While still in the Agent Builder, click **Refresh** (circular arrow) in the top right corner of the **Conversation Preview**.
2. Don't worry if the dots are spinning in the Conversation Preview, go ahead and enter this prompt:  
**Can you let me know more about the full moon beach party experience?**
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?**



○ Can you book a kayaking trip for two for tomorrow?

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

## 14) Publish and Update

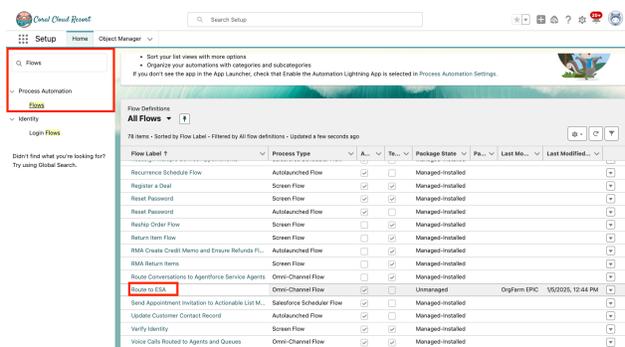


1. In the Quick Find, search for and select **Embedded Service Deployments**.

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.*

## 15) Re-route the Flow



1. In the Quick Find, search for and select **Flows**.

2. Click on the **Route to ESA** flow.

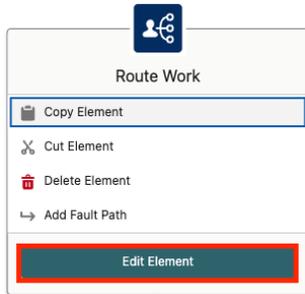
3. Click the **Route to ESA** component  and select **Edit Element**.

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*

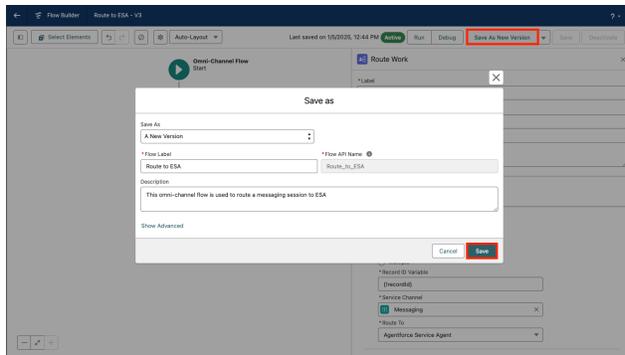


Set Input Values

- \* How Many Work Records to Route?
  - Single
  - Multiple
- \* Record ID Variable
  -
- \* Service Channel
  -
- \* Route To
  -

---

- \* Agentforce Service Agent
  -

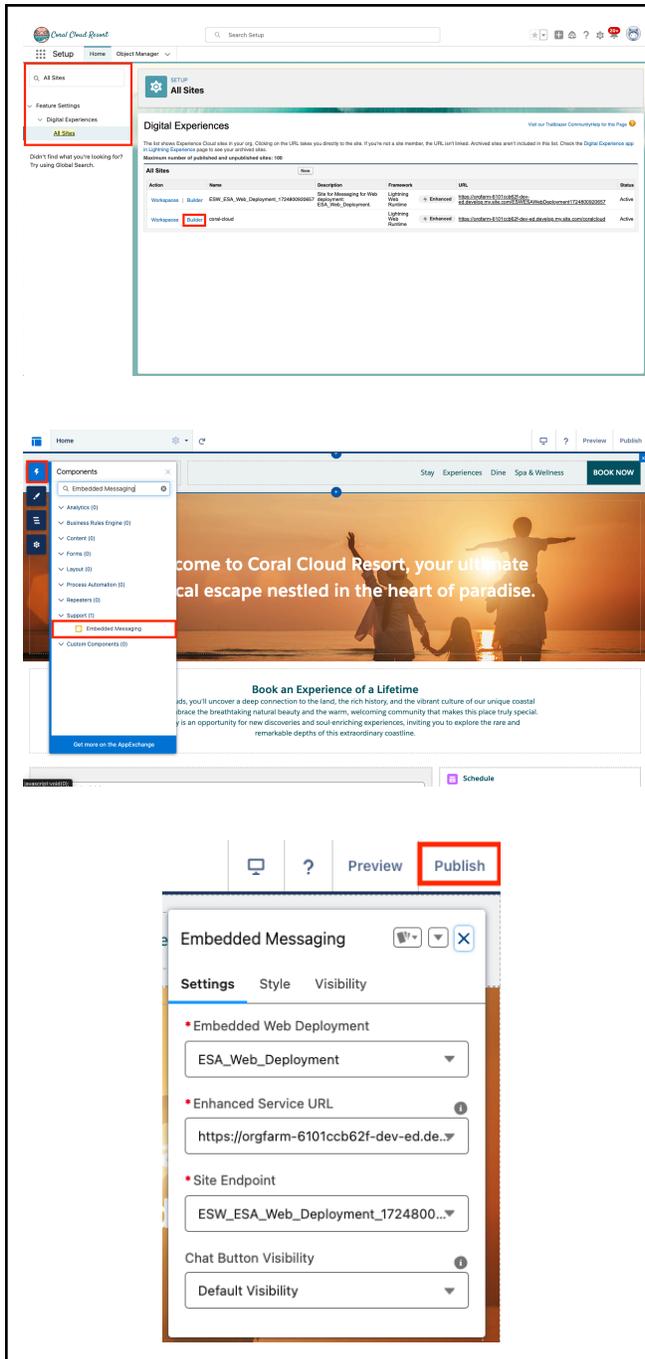


*doesn't show up as an option, return to Agent Builder for the CC Service Agent and make sure it's activated*

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.

## 16) Add the Agent to the Coral Cloud Site

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



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.*

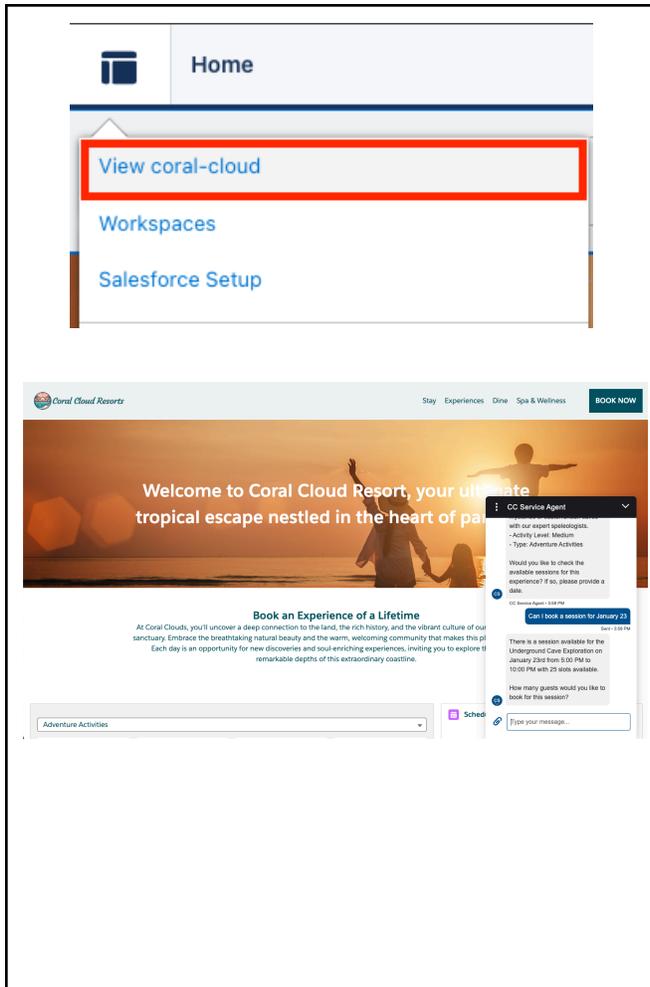
5. Leave the default settings.
6. Click **Publish** in the upper right corner.
7. Click **Publish** in the confirmation window.
8. Click **Got It**.

## 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.