

## 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.

<u>Note</u>: 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
<section-header><b>1) Create Agent force Playgopada</b> (Intermediate a state of the state of</section-header>	<ol> <li>Open the <u>Configure an</u> <u>Agentforce Service Agent Trail</u></li> <li>Create Agentforce Playground by clicking the button "Get Started for Free".</li> <li>Sign in.</li> </ol>
2) Enable Agents	1. Click 🄯 and click <b>Setup</b> . The

Construit functioned     Construit functi	Setup page opens in a new tab.
La Del De Construit Be Construi	<ol><li>In the Quick Find, search for and select Einstein Setup.</li></ol>
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C Sector	<ol> <li>Refresh your browser to reload Setup.</li> </ol>
Constraints     Constraint     Constraint     Constraint     Constraint     Constraints	<ol><li>In the Quick Find, search for and select Agents.</li></ol>
	<ol><li>Click the Agentforce toggle, and ensure it is set to On.</li></ol>
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3) Publish the Experience Cloud Site	<ol> <li>In the Quick Find, search and select All Sites.</li> </ol>
Contraction	2. Click <b>Builder</b> next to the
A set of	coral-cloud site. If a popup appears, click <b>OK</b> .
	3. Click <b>Publish</b> in the upper right corner.
	<ol> <li>Click <b>Publish</b> in the confirmation window.</li> </ol>
	5. Click <b>Got It</b> .
	6. Click the <b>Experience Builder</b>

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Welcome to C Pater jurian Appical Scape	7. Click Salesforce Setup.
Arrow and a sector of a s	8. Refresh your browser to reload Setup.
4) Add a Permission Set	<ol> <li>Search for Users in the Quick Find and select Users.</li> </ol>
Bag we Restroyer	<ol> <li>Click the EinsteinServiceAgent User.</li> </ol>
A conservation for a service of a servi	<ol> <li>Scroll down to the Permission Set Assignments section and click Edit Assignments.</li> </ol>
Description         Enabled Permission Bets           Autoble Permission Sets         Enabled Permission Bets           Selestionce Scheduler Geeler Service Deter Integration User Service Outel Integration User Service Outel Integration User Service Deter Integration User Servic	<ul> <li>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.</li> </ul>
	5. Click <b>Save</b> .



- 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.
- 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
  - $\circ$  Escalation
- Feel free to review the prebuilt action for the General FAQ topic by clicking See Included Actions. Click Next.
- 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.
	<ol><li>Select EinsteinServiceAgent as the User Agent.</li></ol>
	<ul> <li>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.</li> <li>11. For now, Data Cloud won't be used. Click Create.</li> </ul>
6) Add Custom Topics and Actions	1. From the Agent Builder, click
Manage the topics assigned to your agent. To make changes, your agent must be deactivated. Q Search topics 1 items · Sorted by Topic Label(asc)	Note: If the New button does not appear, try toggling the Einstein Copilot for Salesforce on the agent setup page and refreshing the page.
General FAQ	<ol> <li>In the modal, configure the Topic field as follows:</li> </ol>
	<ul> <li>Topic Label:</li> <li>Experience Management</li> </ul>

Create a Topic	0	Classification
Topic Label		<mark>This topic ado</mark>
Experience Management		<mark>inquiries and</mark>
lassification Description 0		booking expe
loud Resort, including making reservations, modifying bookings, and answering queries about sperience details.		<mark>Cloud Resort</mark> ,
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curate information and resolving issues promptly.		answering qu
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following instructions are used to run this topic.		-
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	3.	Leave everyth click <b>Next</b> .
	4.	Custom action
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		CIICK FINISH.

 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.

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.

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

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- 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.

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Require input     Collect data from user		e with an agent:	<ol> <li>Select Get Customer Details.</li> <li>Leave the other options as is, and click Next.</li> <li>For email, check Require Input</li> <li>For memberNumber, check Require Input.</li> <li>For contact, check Show in conversation.</li> <li>Click Finish.</li> </ol>
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		e with an agent:	<ol> <li>Select Get Customer Details.</li> <li>Leave the other options as is, and click Next.</li> <li>For email, check Require Input</li> <li>For memberNumber, check Require Input.</li> <li>For contact, check Show in conversation.</li> <li>Click Finish.</li> </ol>

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<b>10)</b> Add Action to Generate a Personalized Schedule         Create an Agent Action         Create an Agent Action         Durate an existing action         Actions are how an agent gets things done. To create an agent action, start with the functionality you already have in Salesfores, such as flows or prompt templates. Select an action to reference, and then configure it for use with an agent.         *Reference Action Type         *Reference Action Type         *Reference Action Label         *Agent Action Label         *Agent Action Label         *Reference Action Label         *Agent Action Apple         *Agent Action Label         *Agent Action Apple         *Agent Action Apple         *Agent Action Apple         *Agent Action Apple	<ol> <li>With the This Topic's Actions subtab still selected, click New and select Add Action.</li> <li>Select Prompt Template as the Reference Action Type.</li> <li>Select Generate Personalized Schedule as the Reference Action.</li> <li>Leave the other options as is and click Next.</li> <li>Configure the instructions as</li> </ol>

	follows:
<section-header></section-header>	<ul> <li>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.</li> <li>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.</li> <li>For the Prompt Response Output, check Show in conversation.</li> </ul>
	7. CIICK FINISN.
11)Add Action to Create a Booking	<ol> <li>Click New and select Add Action.</li> </ol>
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 promot terminates. Salest an action you want the agent action to reference and then configure	<ol><li>Select Flow as the Reference Action Type.</li></ol>
Reference Action     Flow     Reference Action     Create Experience Session Booking     X	<ol> <li>Select Create Experience Session Booking.</li> </ol>
Agent Action Label     Agent Action API Name Create Experience Session Booking Create_Experience_Session_Booking	<ol> <li>Leave the other options as is, and click <b>Next</b>.</li> </ol>
	<ol> <li>For Contact_Id, check Require Input.</li> </ol>
. Not	<ol> <li>For Guests, check Require Input and Collect data from user.</li> </ol>

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- 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.
- 1. Click the **Topic Configuration** subtab.
- 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.

	<ul> <li>6th Instruction:         <ul> <li>If asked to recommend experiences that a user might be interested in, use the 'Generate Personalized</li> <li>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.</li> </ul> </li> </ul>
	4. Click Save.
	5. Click Activate.
13) <u>Test the Agent</u>	<ol> <li>While still in the Agent Builder, click <b>Refresh</b> (circular arrow) in the top right corner of the <b>Conversation Preview</b>.</li> </ol>
Let's chat! Hi, I'm an Al service assistant. How can I help you?	<ol> <li>Don't worry if the dots are spinning in the Conversation Preview, go ahead and enter this prompt:</li> <li>Can you let me know more about the full moon beach party experience?</li> </ol>
	<ol> <li>Reminder: email address is sofiarodriguez@example.com and 10008155 is the membership number.</li> </ol>
Description     0     A forme is down'ter address.       2     Instructions @     0       3     A stations     0       4     Best of address address.     0       5     Best of address address.     0       6     Best of address.     0       6     Best of address.     0       7     Best of address.     0	<ol> <li>Continue to interact with the agent with prompts like:</li> </ol>
wroccustore trails     Organ <sup>1</sup> - machine dispersione due and <sup>1</sup> - machine dispersione due	<ul> <li>What experiences would you recommend for today?</li> </ul>

	<ul> <li>Can you book a kayaking trip for two for tomorrow?</li> <li>5. Click the back arrow to return to Setup</li> </ul>
<complex-block><complex-block><complex-block><complex-block><complex-block><complex-block><image/><image/><image/><image/><image/><image/><image/></complex-block></complex-block></complex-block></complex-block></complex-block></complex-block>	<ol> <li>In the Quick Find, search for and select Embedded Service Deployments.</li> <li>Select the ESA Web Deployment.</li> <li>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.</li> </ol>
State in the set of	<ol> <li>In the Quick Find, search for and select Flows.</li> <li>Click on the Route to ESA flow.</li> <li>Click the Route to ESA component Route to ESA and select Edit Element.</li> </ol>
RAA Bars have Series Top Development to Series Top Development to Series Top Development to Series Top Development to Series Top Development Top Series Top Serie	<ul> <li>4. Select these values in the Set Input Values section:</li> <li>Route To: Agentforce Service Agent</li> <li>Agentforce Service Agent: CC Service Agent</li> <li>Note: If CC Service Agent</li> </ul>

Route Work Copy Element Cut Element Delete Element Add Fault Path Edit Element	<ul> <li>doesn't show up as an option, return to Agent Builder for the CC Service Agent and make sure it's activated</li> <li>5. Click Save As New Version.</li> <li>6. Keep everything as is and click Save.</li> </ul>
Set Input Values <ul> <li>How Many Work Records to Route?</li> <li>Sincla</li> </ul>	7. Click Activate.
Suitgie Multiple Record ID Variable (recordId) Service Channel Service Channel Record To Agentforce Service Agent	8. Click the <b>back arrow</b> to return to Setup.
Agentforce Service Agent     CC Service Agent     X	
? ↓ Inactive Run Debug Save As New Version   Save Activate	
← 😴 Flow Builder	
16) <u>Add the Agent to the Coral</u> <u>Cloud Site</u>	<ol> <li>In the Quick Find, search and select All Sites.</li> </ol>
	2. Click <b>Builder</b> next to the coral-cloud site.
	3. Click the <b>Components</b> widget

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	<b>F</b> .
	<ul> <li>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.</li> </ul>
C Entedded Masagni  V Magasili V Magasili V Consert (I) V Consert (I) V Consert (I)	5. Leave the default settings.
• Least Bit     come to Coral Cloud Resort, your ultimate       • News Alteration     cal escape nestled in the heart of paradise.       • News Nill     • Start Bit       • Start Bit     • Control Corport	6. Click <b>Publish</b> in the upper right corner.
Book an Experience of a Lifetime dis, you'll uncover a deep connection to the lind, the rich history, and the vibrant culture of our uncape coastal incente the breathinghave, muchanismic commonly that makes this place truly special, yis an opportunity for new discoveries and coult enriching experiences, inviting you to applice the rare and remarkable depths of this extraordinary coastile.	7. Click <b>Publish</b> in the confirmation window.
Preview Publish     Embedded Messaging   Settings   Style   Visibility     • Embedded Web Deployment   ESA_Web_Deployment   • Enhanced Service URL   • https://orgfarm-6101ccb62f-dev-ed.de*   • Site Endpoint   ESW_ESA_Web_Deployment_1724800*   Chat Button Visibility   Default Visibility	8. Click <b>Got It</b> .
17) <u>View the Agent as a Customer</u>	<ol> <li>Click the Experience Builder menu          <ul> <li>Select View coral-cloud to open the published coral cloud site. Note: It may take a few minutes for the site to publish.</li> </ul> </li> </ol>



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.