We love feedback!
Share yours for a chance to win 1 of 5 Salesforce certification vouchers.

Salesforce Hands-on Training
Get Started with Agentforce
(formerly Get Started with Einstein Copilot)
EXERCISE GUIDE



Log in to Salesforce

Instructions:

1. Sign up for an org.
    a. Open Chrome and navigate to sforce.co/OrgFarmSignup
    b. Click the **Sign up here!** button.
    c. Use event code: **Q2bMXi**
    d. Complete the form and click **Submit**.
2. Log in with your credentials.
    a. Use the provided **username** and **password** to login to your org at login.salesforce.com

© Copyright 2024 salesforce.com, inc. All rights reserved.

Exercise 1: Get Started with Agents

Instructions:

Task 1: Enable Einstein Features

1. Open **Setup** from the Setup menu at the top right.
2. Enable Einstein:
    a. Use Quick Find to locate and open **Einstein Setup**.
    b. Verify that Einstein is turned on. If not, toggle the **Turn on Einstein** slider to **On**.
    c. Refresh your browser page if you had to turn it on.
3. Enable Agents *(formerly Einstein Copilot)*:
    a. Use Quick Find to locate and open **Agents**.
    b. Verify that Agents is turned on. Toggle the **Einstein Copilot for Salesforce** slider to **On**.
4. Configure the agent with a standard topic and activate.
    a. In the list of agents at the bottom of the screen, select **Einstein Copilot**.
    b. Select **Open in Builder**.
    c. Assign the standard topic to the agent.
        i. Verify the agent is deactivated. If not, deactivate it.
        ii. Verify the **Topics** section of the sidebar is open.
        iii. Open the dropdown menu (down arrow). It is located above the **Search topics...** field and to the right.
        iv. Select **Add from Asset Library**.
        v. Locate **General CRM** and check its box.
        vi. Select **Finish**.
        vii. Select the **Activate** button to activate the agent.

© Copyright 2024 salesforce.com, inc. All rights reserved.

d. Refresh the page.

5. Review the actions in the agent.
    a. Open the **Actions** sidebar by selecting .
    b. Note the standard actions assigned to the agent. These actions power the default capabilities of Einstein Agent.
    c. Select the **back arrow button** to leave Agent Builder and return to Setup.

Task 2: Explore Standard Actions in an App

1. Use the App Launcher to open the **Coral Cloud** App.
2. Select the **Einstein** icon in the upper-right corner to open the Einstein sidebar.

   Note: If you don't see the Einstein icon, refresh the browser.
3. Enter the following utterance in the Einstein sidebar to check for high priority cases:

   ```
   Are there any high priority cases open?
   ```
4. Enter the following utterance to learn more about the case:

   ```
   Can you summarize the first case?
   ```
5. Enter the following utterance to learn more about the customer:

   ```
   Can you give me an overview of the contact?
   ```
6. Enter the following utterance to see how many contacts there are in Minnesota:

   ```
   How many contacts do we have in the state of Minnesota?
   ```

Task 3: Explore Standard Actions in the Agent Builder

1. In Setup, use Quick Find to locate and open **Agents**.
2. Select **Einstein Copilot** in the list of agents.
3. Select **Open in Builder**.
4. View the standard actions used to execute your prompts in the Dynamic Plan panel.
    a. Observe how Einstein uses the **Query Records** action (that it selects from the **EmployeeCopilot_GeneralCRM** topic) by entering the following utterance:

       ```
       Are there any high priority cases open?
       ```

© Copyright 2024 salesforce.com, inc. All rights reserved.

b. Observe how Einstein uses the **Get Record Details** action (that it selects from the **EmployeeCopilot_GeneralCRM** topic) by entering the following utterance:
`Can you summarize the first case?`

c. Determine what Einstein does when you enter the following utterance:
`Can you give me an overview of the contact?`

   i. What topic was selected?
   ii. What action was selected?

d. Observe how the agent uses the **Query Records with Aggregate** action (that it selects from the **EmployeeCopilot_GeneralCRM** topic) by entering the following utterance:
`How many contacts do we have in the state of Minnesota?`

5. Select the **back arrow** button to return to Setup.

© Copyright 2024 salesforce.com, inc. All rights reserved.

Exercise 2: Extend the Agent with a Flow Action

Instructions:

Task 1: Create the Agent Flow Action

1. From **Setup**, open **Agent Actions**.
2. Select **+ New Agent Action**.
3. Configure the action as follows:
    a. Reference Action Type: **Flow**
    b. Reference Action: **Issue Resort Credit**
    c. Copilot Action Label: [keep default]
    d. Copilot Action API Name: [keep default]
    e. Select **Next**.
    f. Leave the default instructions in.
    g. Check **Require Input** for the amount and contactId.
    h. Check **Show in conversation** for the creditID output.
4. Select **Finish**.

Task 2: Add the Action to the Agent

1. From **Setup**, open **Agents**.
2. Select **Einstein Copilot** in the list of agents.
3. Select **Open in Builder**.
4. **Deactivate** the agent to add your new custom action. Select **OK**.
5. Create a new topic and add the agent flow action to that topic.
    a. With the **Topics** sidebar open, remove the **MigrationDefaultTopic** topic by selecting the dropdown arrow next to it and selecting **Remove from Agent**.
    b. Select **New Topic** in the dropdown menu next to the **Search topics...** field.
    c. Configure the topic as follows:

© Copyright 2024 salesforce.com, inc. All rights reserved.

Field	Value
Topic Label	`Experience Management`
Classification Description	`This topic addresses customer inquiries and issues related to booking experiences at Coral Cloud Resort, including making reservations, issuing resort credits, and answering queries about experience details.`
Scope	`The agent's job is to assist users in navigating and managing bookings and refunds for different experiences offered by Coral Cloud Resort, ensuring a seamless customer service experience by providing accurate information and resolving issues promptly.`
Instruction	`When a user asks for an issue of resort credit, use the Issue Resort credit action in the topic Experience Management to issue the resort credit.`

   d. Select **Next**.
   e. Add the **Issue Resort Credit** action by checking its box.
   f. Add the **Identify Record by Name** action by checking its box.
   g. Select **Finish**.
6. **Activate** the agent.
7. Click the back arrow to exit the Builder.

Task 3: Test the action

1. Test in the Coral Cloud App.
   a. Use the App Launcher to open the **Coral Cloud** App.
   b. Navigate to the contact record for **Sofia Rodriguez**.
   c. Open the Einstein Copilot by selecting the Einstein icon .
   d. Enter the following utterance:

      ```
      Issue $100 resort credit to this contact
      ```

   e. Go to the **Related** tab and scroll down to **Credits**. Verify the resort credit you just issued is there.

© Copyright 2024 salesforce.com, inc. All rights reserved.

f. Remove the credit by going to the dropdown arrow next to it and selecting **Delete**.

2. Test the action in the Agent Builder.
    a. From **Setup**, open **Agents**.
    b. Select the **Einstein Copilot** in the list of agents.
    c. Select **Open in Builder**.
    d. Enter the following utterance:

    ```
    Issue $250 resort credit to Sofia Rodriguez
    ```

        i. What topic was selected?
        ii. What action was selected?

© Copyright 2024 salesforce.com, inc. All rights reserved.

BONUS Exercise 3: Extend Copilot with an Apex Action

Task 1: Create the Apex Class

1. From **Setup**, go to **Apex Classes**.
2. Select **New**.
3. Enter the following code and then **Save** the file:

> **Important** ⚠️ Copying text from a PDF can sometimes introduce line-break or character encoding errors. We created a helpful Quip document where you can easily copy a "clean" version of the code below. Check it out here: https://sfdc.co/aicopypaste

```
public with sharing class CheckWeather {
@InvocableMethod(label='Check Weather' description='Check weather at Coral Cloud Resort at
a specific date')
public static List<WeatherResponse> getWeather(List<WeatherRequest> requests) {
// Retrieve the date for which we want to check the weather
Datetime dateToCheck = (Datetime) requests[0].dateToCheck;
WeatherService.Weather weather = WeatherService.getResortWeather(dateToCheck);
// Create the response for Copilot
WeatherResponse response = new WeatherResponse();
response.minTemperature = weather.minTemperatureC;
response.maxTemperature = weather.maxTemperatureC;
response.temperatureDescription = 'Temperatures will be between ' + weather.minTemperatureC
+ '°C ('+ weather.minTemperatureF +'°F) and ' + weather.maxTemperatureC + '°C ('+
weather.maxTemperatureF +'°F) at Coral Cloud.';
return new List<WeatherResponse>{ response };
}
public class WeatherRequest {
@InvocableVariable(required=true description='Date for which we want to check the
temperature. The variable needs to be an Apex Date type with format yyyy-MM-dd.')
public Date dateToCheck;
}
public class WeatherResponse {
@InvocableVariable(description='Minimum temperature in Celsius at Coral Cloud Resort
location for the provided date')
public Decimal minTemperature;
@InvocableVariable(description='Maximum temperature in Celsius at Coral Cloud Resort
location for the provided date')
public Decimal maxTemperature;
@InvocableVariable(description='Description of temperatures at Coral Cloud Resort location
for the provided date')
public String temperatureDescription;
}
}
```

© Copyright 2024 salesforce.com, inc. All rights reserved.

Task 2: Create the Agent Action

1. From **Setup**, open **Agent Actions**.
2. Select **+ New Agent Action**.
3. Configure the action as follows:
    a. Reference Action Type: **Apex**
    b. Reference Action: **Check Weather**
    c. Copilot Action Label: [keep default]
    d. Copilot Action API Name: [keep default]
    e. Select **Next**.
4. Notice that the instructions fields are pre-filled based on the descriptions provided in the Apex code.
5. Check **Collect data from user** for the input dateToCheck.
6. Check **Show in conversation** for the temperatureDescription output.
7. Select **Finish**.

Task 3: Add the Action to the Agent

1. From **Setup**, go to **Agents**.
2. Select **Einstein Copilot** in the agent list.
3. Select **Open in Builder**.
4. **Deactivate** the agent. Select **OK**.
5. Add the action to the Experience Management topic.
    a. Select **Edit** from the dropdown menu next to the topic **Experience Management**.
    b. Go to the **This Topic's Actions** tab.
    c. Select the plus sign button to add the action.
    d. Check the **Check Weather** action and then select **Finish**.
    e. Go to the **Topic Configuration** tab.
    f. Update the topic configuration with the following:

© Copyright 2024 salesforce.com, inc. All rights reserved.

Field	Value
Classification Description	`This topic addresses customer inquiries and issues related to booking experiences at Coral Cloud Resort, including making reservations, issuing resort credits, and answering queries about experience details and providing weather information.`
Scope	Leave as-is
New Instruction [add by clicking New Instruction button]	`When a user asks about the weather use the check weather action in the topic Experience management.`

g. Select **Save**.

6. **Activate** the Copilot.
7. Test it.

   a. In the Conversation Preview panel, enter the following prompt:

   `Check weather in San Francisco for [Enter Tomorrow's Date]`

© Copyright 2024 salesforce.com, inc. All rights reserved.

BONUS Exercise 4: Extend Copilot with a Prompt Template Action

Task 1: Create the Flex Prompt Template

1. In Setup, locate and open **Prompt Builder**.
2. Select **New Prompt Template** and configure a new Flex Prompt Template based on guest contact records:
    a. Prompt Template Type: **Flex**
    b. Prompt Template Name: `Generate Personalized Schedule`
    c. API Name: [this is auto-filled, leave as default]
    d. Template Description:
    ```
    Generates a personalized schedule that includes the time and location of resort experiences that are available today, and that match the guest's interests.
    ```
    e. Source Name: `Contact`
    f. API Name: `myContact`
    g. Source Type: **Object**
    h. Object: **Contact**
    i. Select **Next**.
3. Add the following into the Prompt Template Workspace:
    ```
    Your name is {!$User.FirstName}. You work in the guest success team at {!$Organization.Name}.
    Introduce yourself, then present the list of resort activities happening today that match the guest's interests.
    For clarity, use a bullet list.
    For each activity, include name, time, location and duration on a single line. Do not include the date.
    Tell the guest to reach out if they'd like to book any of these activities.
    List of activities happening today that match the guest's interests:
    ```
4. In the Preview panel, verify the **Resolution** is enabled.

© Copyright 2024 salesforce.com, inc. All rights reserved.

5. Select **Sofia Rodriguez** in the Contact field.
6. Select **Save & Preview**.
7. Review and activate.
    a. In the **Resolution** panel, review the prompt that was generated.
    b. In the **Response** panel, review the response.
    c. Activate the prompt template.
8. Select the back arrow to return to Setup.

Task 2: Create the Agent Action

1. In **Setup**, open **Agent Actions**.
2. Select **New Agent Action**, and configure the action as follows:
3. Enter the following:
    a. Reference Action Type: **Prompt Template**
    b. Reference Action: **Generate Personalized Schedule**
    c. Copilot Action Label: [keep default]
    d. Copilot Action API Name: [keep default]
    e. Select **Next**.
4. For the Copilot Action instructions, enter the following:

    ```
    This action is used to generate a personalized schedule for a
    contact. The personalized schedule includes a list of resort
    experiences the contact may be interested in and a suggested schedule
    for the day. You must use the QueryRecords action to fetch the contact
    before executing the action.
    ```

5. For the Input instructions, enter the following:

    ```
    Contact for which the personalized schedule should be generated. Must
    be a valid JSON representing the contact info, chained from having
    executed the QueryRecords action.
    ```

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

© Copyright 2024 salesforce.com, inc. All rights reserved.

Task 3: Add the Action to the Agent

1. From **Setup**, open **Agents**.
2. Select **Einstein Copilot** in the Agent list.
3. Select **Open in Builder**.
4. **Deactivate** the agent.
5. Add the action to the Einstein Copilot Agent.
    a. Select **Edit** from the dropdown menu next to the topic **Experience Management**.
    b. Go to **This Topic's Actions** and select the plus sign.
    c. Check the **Generate Personalized Schedule** action and then select **Finish**.
    d. Go to the **Topic Configuration** tab.
    e. Update the topic configuration with the following:

Field	Value
Classification Description	`This topic addresses customer inquiries and issues related to booking experiences at Coral Cloud Resort, including making reservations, issuing resort credits, and answering queries about experience details, generating personalized schedules, and providing weather information.`
Scope	Leave as-is
New Instruction	No new instructions are needed

6. Select **Save**.
7. **Activate** the agent.
8. Test in the Action Builder Conversation Preview.
    a. Refresh the conversation preview panel.
    b. Enter the following prompt in the Conversation Preview:

    ```
    Generate a personalized schedule for contact named Sofia Rodriguez
    ```

© Copyright 2024 salesforce.com, inc. All rights reserved.

Additional Resources

Help Documentation

Introducing the Agentforce Platform

Considerations for Agents and Copilot

Standard Agent Action Reference

Best Practices for Copilot Action Instructions

Self-paced Learning

Build Your First Agent with Agentforce

Get Hands-on with Data Cloud

Credentials

Certified AI Associate

Certified AI Specialist

© Copyright 2024 salesforce.com, inc. All rights reserved.