

Watsonx Orchestrate Lab 1a:

Out of the Box Skills

Objective:

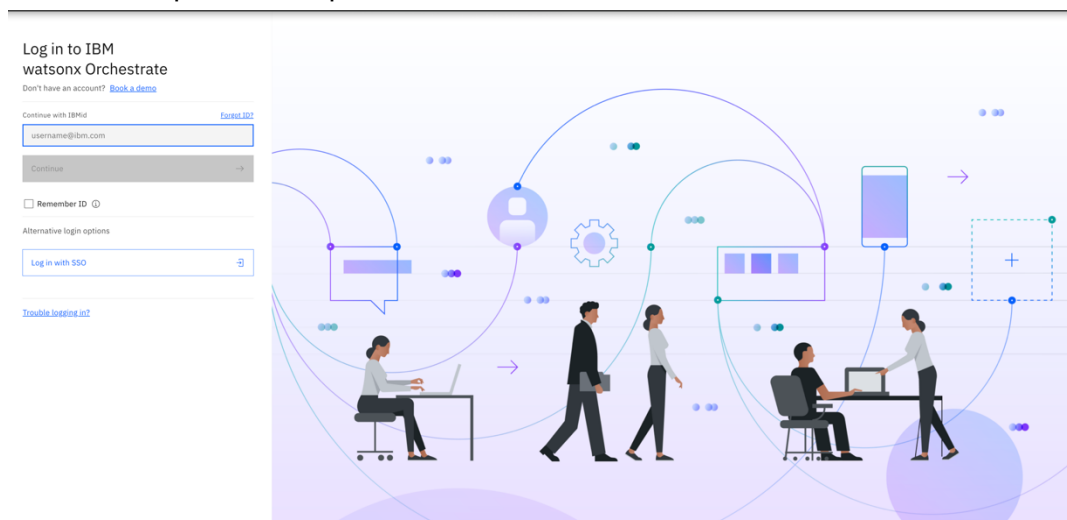
Welcome to watsonx Orchestrate Lab. Watsonx Orchestrate runs on applications and skills. To start off, we will walk through how to connect and use the out of the box skills and use it within the AI Chat.

Use Case:

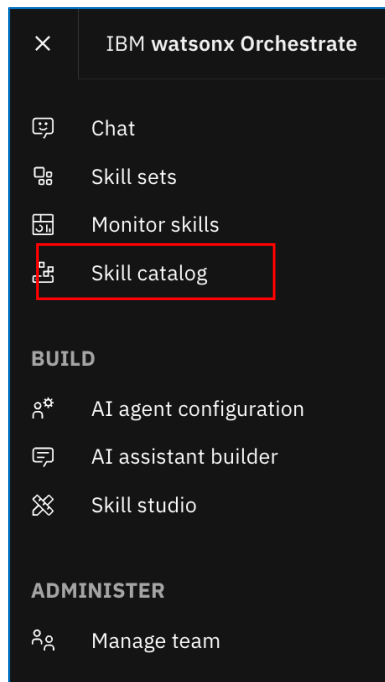
In this lab, you will learn how to connect to salesforce with watsonx orchestrate, add prebuilt skills of salesforce and how to use in AI chat. Credentials for this lab can be found here.

Connecting to watsonx Orchestrate

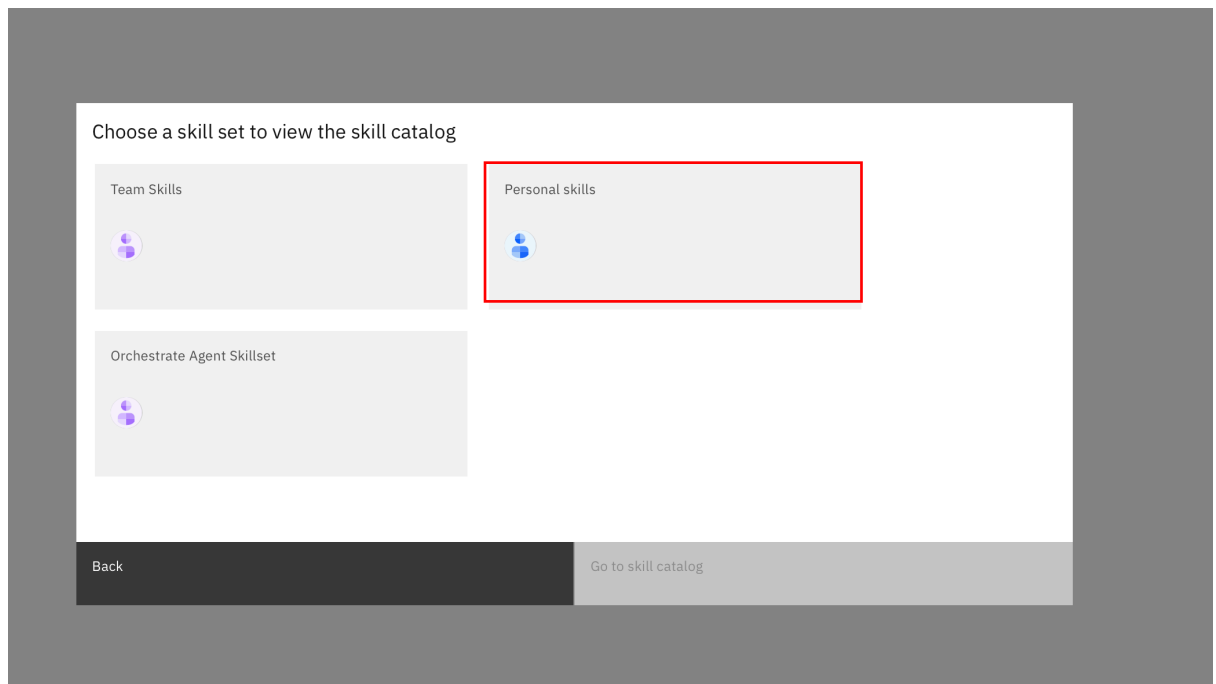
1. Login to watsonx Orchestrate (<https://dl.watson-orchestrate.ibm.com>) using your IBM Cloud email id and password. If you have trouble locating your username and password, please contact an IBM-er.



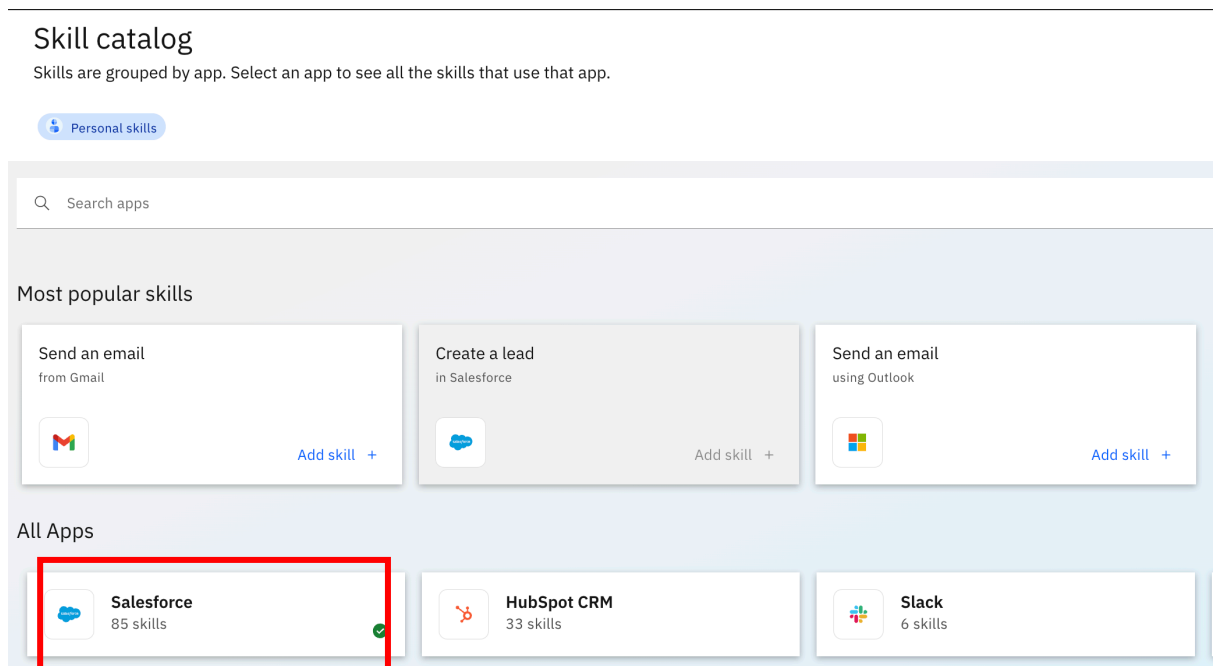
2. You will land on watsonx Orchestrate homepage. Click on Skill Catalog on the left hand hamburger menu



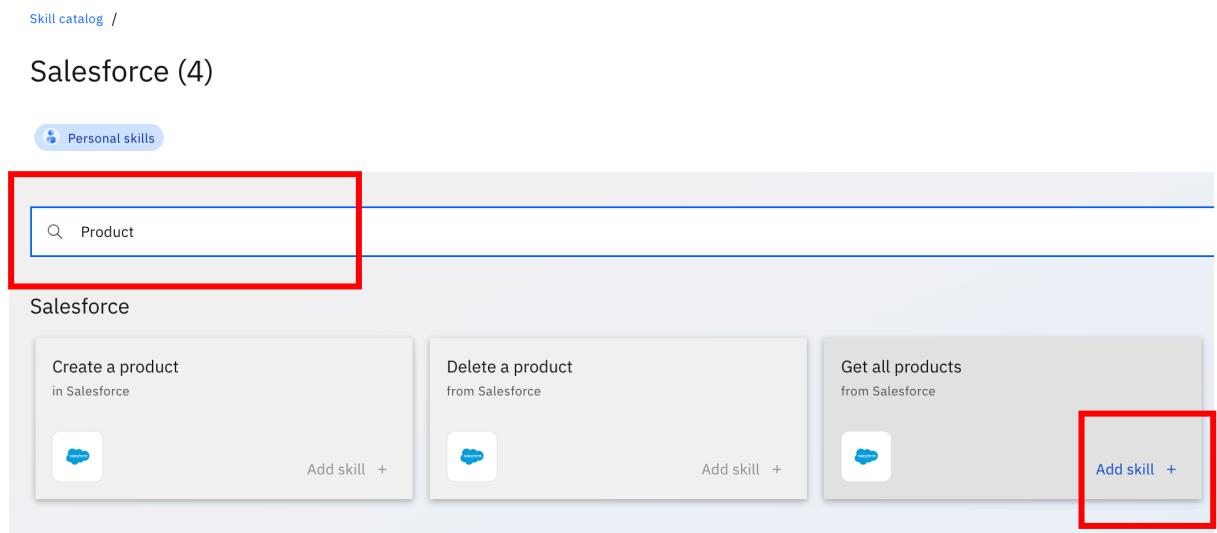
Next select “Personal Skills” and click “Go to skill Catalog”



3. Search “Salesforce” App in the given Application tiles under Personal skills.

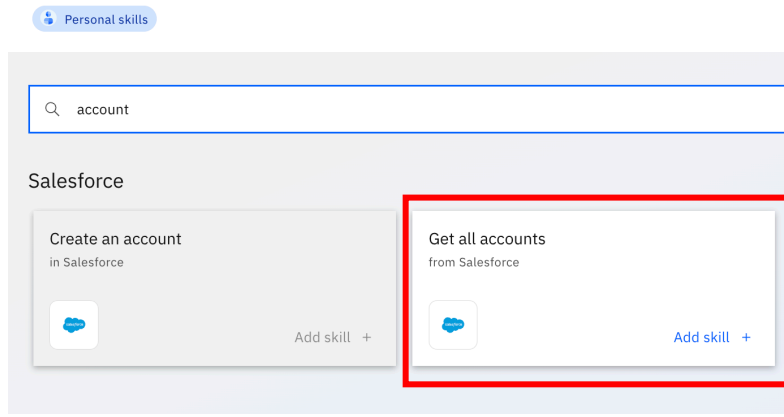


4. Search for “Product” in the search bar and select “Get all Products”. click “Add skill”

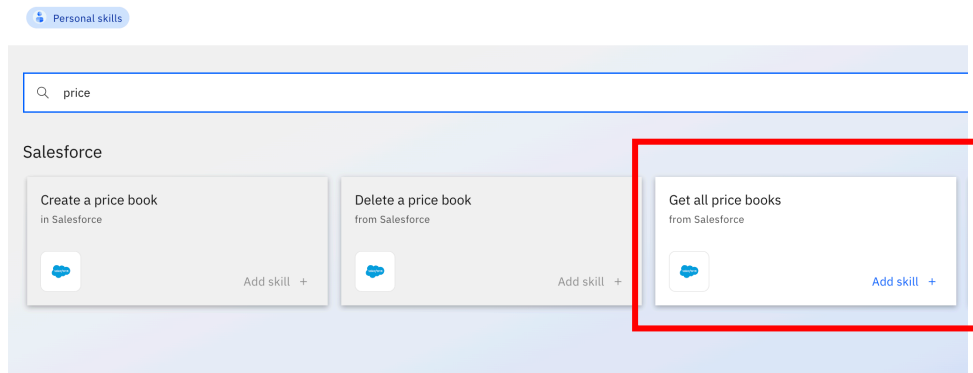


5. Repeat the above steps to add in “Get all Pricebooks” and “Get all Accounts” by searching “Account” and “Price” in the search bar. Add all the respective skills.

Salesforce (3)



Salesforce (4)



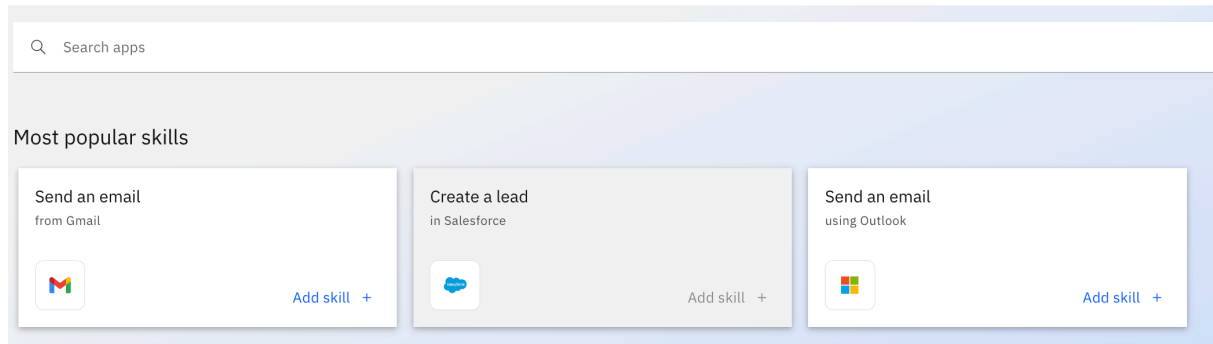
6. The above skills do not require any credentials as an admin have already connected it into this instance.
7. Next, we will try one skill which requires you to add in the credential on your own.
8. In the next steps, we will be showing how to connect to the Send an email skill from either Gmail/Outlook.
 - a. For Gmail, you will be using your own “Gmail” credentials
 - b. For Outlook, refer to the [connection details sheet](#) and use the outlook credentials given to you. (Your IBM Credentials will not work)
9. Let’s go back to main skill catalog page by simply clicking on the **Skill Catalog** at the left corner of the page.

You will see the following screen.

Skill catalog

Skills are grouped by app. Select an app to see all the skills that use that app.

Personal skills



Here, you can add either of the skills as per your choice.

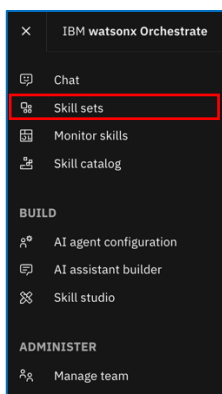
Till now, you have learned how to select the specific applications (App) and their respective skill sets to your Personal skill sets which can be used further. Let's move to the next step.

Configure AI Agent with Custom Skill

Note:

- For this workshop, we've given everyone admin rights. If you notice you're not one, feel free to contact the course owner.
- **For this workshop, we've added all apps and skills required to complete this lab. You can follow through the steps, but now onwards you DO NOT NEED to connect or add on any of the skills anymore.**
- **DO NOT** edit any skills credentials

1. Go to "Skill Sets" from the top left hamburger menu.



2. From the dropdown menu “Team Skills” please select “Orchestrate Agent Skillset”.

IBM watsonx Orchestrate

English

Team Skills

Skill sets

Team Skills

Orchestrate Agent Skillset

Team Skills

Skills (11)

The skills added to this team are available to this team's members. These skills complete related tasks for the team members so members can work more efficiently and effectively.

Search

Manage skills

Name	App
Supplier Research	
Reorder_Decision_Flow	
Optimal Reorder Quantity	
Get all products	
Get_Supplier_Flow	
Create a new order in Salesforce	

3. After selecting “Orchestrate Agent Skillset”, select “Connections”

Orchestrate Agent Skillset

Skill sets

Orchestrate Agent Skillset

Skills

Connections

Skills (11)

The skills added to this team are available to this team's members. These skills complete related tasks for the team members so members can work more efficiently and effectively.

Search

Manage skills

Name	App
Get_Supplier_Flow	
Create an order item in salesforce	
Fetch all price books from salesforce	
Optimal Reorder Quantity	
Reorder_Decision_Flow	
Create a new order in Salesforce	

4. Under Connections tab search for “Gmail” or “Outlook”

Skills

Connections

These are the applications that are used by the skills in team enable skills to either use personal or team credentials.

Search

outlo

Application

Microsoft Outlook

Skills

Connections

These are the applications that are used by the skills in team skill set. Appl enable skills to either use personal or team credentials.

Search

gmail

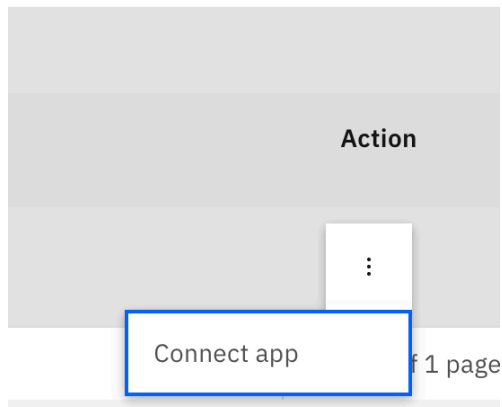
Application

Number of skills

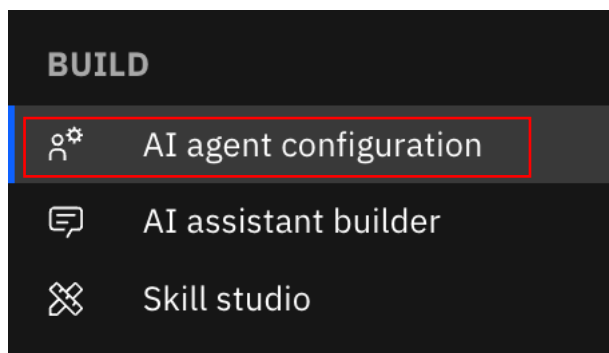
Gmail

1

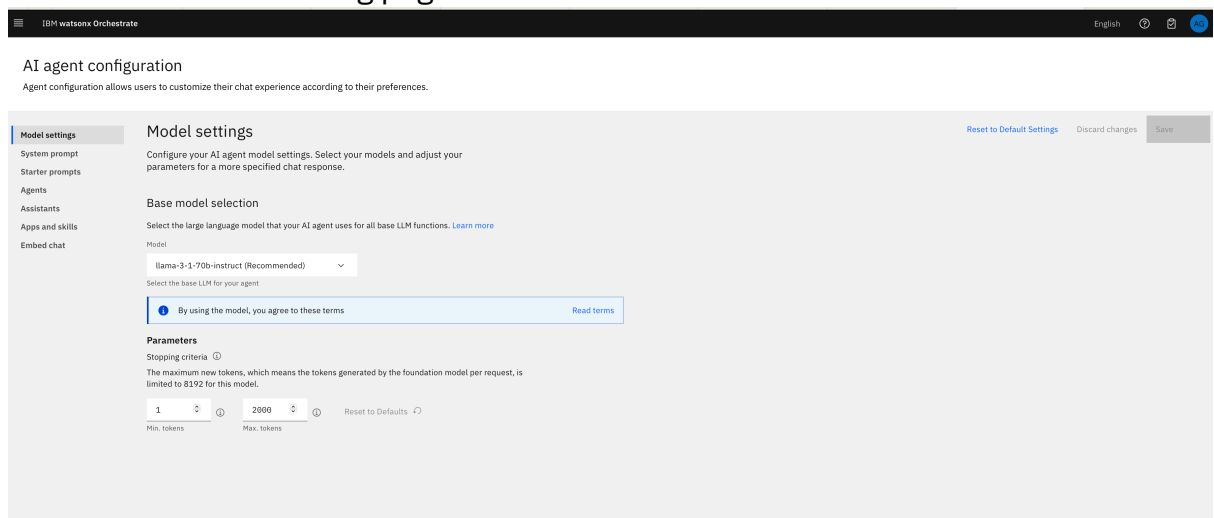
- Click on the triple dots at the end of the row and click on “Connect app”. Follow the instructions to authenticate.



- Navigate to the ‘AI Agent Configuration’ under “Build” from the left hamburger menu.



You will see the following page.



7. Select “Apps and Skills” and search for Salesforce

Model settings
System prompt
Starter prompts
Agents
Assistants
Apps and skills
Embed chat

Apps and skills let your team connect to data and complete tasks in other applications

[Why add apps and skills?](#)

Apps

Skills are grouped by their associated application. Select an app to see all the skills in them.

Search: Salesforce

Custom Salesforce API	Visible	Salesforce

8. Click on the Salesforce tile.

IBM Watsonx Orchestrate

AI agent configuration
Agent configuration allows users to customize their chat experience according to their preferences.

Model settings
System prompt
Starter prompts
Agents
Assistants
Apps and skills
Embed chat

Apps and skills let your team connect to data and complete tasks in other applications

[Why add apps and skills?](#)

[Back to all apps](#)

Search: Salesforce

Create a campaign	Create a case	Create a case comment	Create a case team member	Create a case team member role
Add to chat	Add to chat	Add to chat	Add to chat	Add to chat
Create a contract	Create a contract	Create a feed comment	Create a feed item	Create a file
Add to chat	Add to chat	Add to chat	Add to chat	Add to chat
Create a lead	Create an account	Create an asset	Create an individual	Create an order
Add to chat	Add to chat	Add to chat	Add to chat	Add to chat
Create a predefined case team (templ...	Create a price book	Create a product	Create a role	Create a solution
Add to chat	Add to chat	Add to chat	Add to chat	Add to chat




Items per page: 20 1-20 of 85 items 1 of 5 pages

9. Search for “Get All Product” and click “Add to chat”. If it is already added, please ignore and move to step 15.


< Back to all apps

Salesforce @salesforce

Hidden ⓘ Product

Create a product From Salesforce  Add to chat +	Delete a product From Salesforce  Add to chat +	Get all products From Salesforce  Add to chat +
---	---	---

10. Give a description to this skill and click “Add Skill”. Be as descriptive.

 **Get all products**
from Salesforce

An accurate description of the purpose and capabilities of the skill is required for the AI model to successfully activate this skill in the chat.

Routing description

Description of skill capabilities 32/500

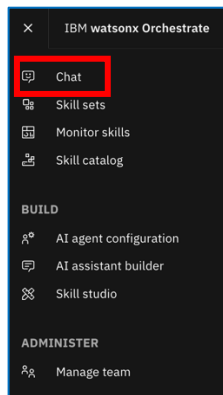
Get all products from Salesforce

Tip: [What makes a good description?](#)

Cancel Add skill

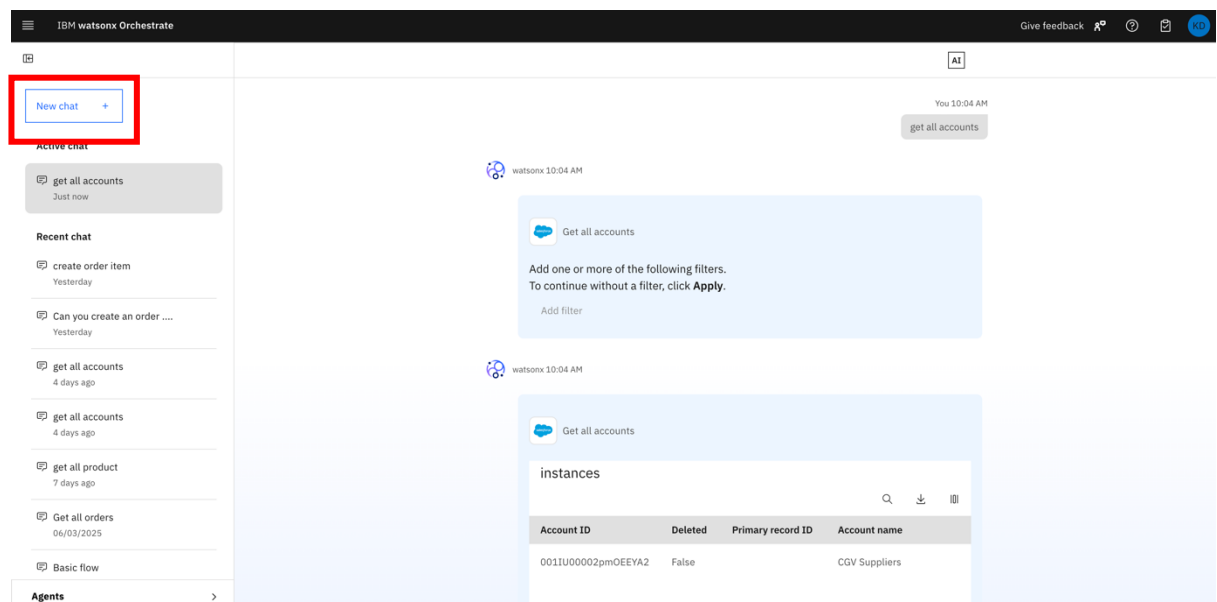
11. Repeat steps 9 and 10 to add “Get all accounts” to the configuration. If it is also added already, please ignore and move to next step.

12. Now, you are ready to use “Get all accounts” skills in your AI chat. Click on chat option from the left hamburger menu.



Next select “New Chat”

13. Type skill name and you can see the response. You can use these skills in your assistant. Click on new chat, type in chat “get all accounts”.



14. If time permits, you may the above steps to add in the “Gmail” or “Outlook” skills into the AI agent Configuration and test out the Send Email function.

IBM watsonx Orchestrate

EnglishGive feedback

New chat

Active chat

get all accounts
Just now

Recent chat

You don't have any active tasks currently being monitored

Active works are started by you or assigned to you and will be monitored until they are completed.

Apps

Assistants

AI

watsonx 5:00 PM

Get all accounts

instances

Account ID	Deleted	Primary record ID	Account name
0011U00002pm0EEYA2	False		CGV Suppliers
0011U00002oGjMBYAO	False		Edge Communications
0011U00002oGjMCYAO	False		Burlington Textiles Corp of A
0011U00002oGjMEYAO	False		Dickenson plc
0011U00002oGjMFYAO	False		Grand Hotels & Resorts Ltd
0011U00002oGjMGYAO	False		United Oil & Gas Corp.
0011U00002oGjMHYAO	False		Express Logistics and Transp
0011U00002oGjMIYAO	False		University of Arizona
0011U00002oGjMJOYAO	False		United Oil & Gas, UK

Type something...

This is the end of the Lab 1a.