


Geeks for Geeks - Build your First Agent

In this hands-on exercise, you'll work with the Coral Cloud Resorts sample app. Coral Cloud Resort is a fictional beach resort that leverages data and artificial intelligence to provide highly personalized experiences to its guests. Your task is to create a customer service agent to assist guests in learning more about their available experiences. You will explore their pre-built capabilities powered by standard actions, and you can choose to extend them with custom actions built with Flow, Apex, and prompts. Get started by enabling Generative AI in your Org.

Before You Begin


Sign up for an org and install Coral Cloud App

1. Sign up for an https://www.salesforce.com/form/developer-signup/?utm_source=geeks4geeks&utm_medium=workshop5&utm_campaign=apac-trailblazer-relations. Data Cloud is also enabled in this org ;)
2. Install the Coral Cloud App in your org.
 - a. Once logged in into your org, replace the URL segment that comes after lightning.force.com with:
`/packaging/installPackage.apexp?p0=04tgL00000006DVQAY`
 - b. Press **Enter**.
 - c. Select **Install for Admins Only** and click **Install**.
3. Approve Third Party access




Install coralcloudws


By Salesforce



☒ **Install for Admins Only**



☐ **Install for All Users**



☐ **Install for Specific Profiles...**

> Advanced Options

Install

Cancel

App Name	Publisher	Version Name	Version Number
coralcloudws	Salesforce	ver 0.1	0.1 (Beta 2)

Description

Coral Cloud App for Agentforce Handson

Additional Details [View Components](#)

- When the package is installed (it should take less than a minute), click **Done**.

Import Sample Data

- Click **App Launcher**, type `Sample Data Import` and select **Sample Data Import**.
- Click **Import sample data**.



Setup

Home

Object Manager 

App Launcher

 Sample Data Import 

Apps

 **Sample Data Import**

Items

No results

[View All](#)

Release Updates

To remove a pack

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

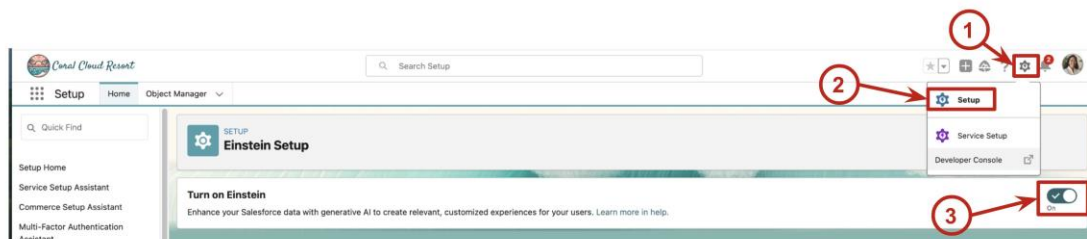
CSP Trusted Site	
https://*.my.salesforce-scrt.com	
https://*.my.site.com	
https://s3-us-west-2.amazonaws.com	

Website	SSL Encrypted
raw.githubusercontent.com	<input checked="" type="checkbox"/>

☒ Yes, grant access to these third-party web sites

Step 1: Verify Generative AI is Enabled

1. Open **Setup** by clicking the **Gear** icon in the top-right corner.
2. In the **Quick Find** search bar, type **Generative AI**, then select **Einstein Setup**.
3. Ensure that the **Turn on Einstein** toggle is set to **On**.



Step 2: Verify Agentforce Agents is Enabled

1. Open **Setup** by clicking the **Gear** icon in the top-right corner.
2. In the quick find, search for **Agents** and click **Agents** (under Agent Studio).
3. Ensure that the **Einstein Copilot for Salesforce** toggle is set to On.
4. You can see the default Agentforce Agent is available in your Org.

Agentforce

Help your employees accomplish key business tasks with a conversational AI assistant for Salesforce CRM.

On

Give Users Access to the Agentforce (Default) Agent

Assign Permission Set Groups

Agent Name	Type	Description	Active	Created By	Last Modi...
Agentforce (Default)	Employee	An AI assistant...			Mar 11, 2025

Step 3: Configure the Coral Cloud Agent

Configure the agent with topics and actions that it can use to support your customers.

1. In the quick find, search for **Agents** and click **Agents** (under Agent Studio).
2. On the Agents page in setup, click on the **Agentforce (Default)**.
3. Remove the default topics **General CRM** and **Single Record Summary** by clicking the dropdown next to each and selecting **Remove from Agent**. (Before removing the topics, make sure to click the Deactivate button on the top right of the page.
4. In Agent Builder, click on the **New** drop down and click on **New Topic**.

orgfarm-fd5f40df85-dev-ed.develop.lightning.force.com/AiCopilot/copilotStudio..

Agent BuilderCoral Cloud Agent

#Topics

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

New

Search topics...

0 items

Topic Label

Start a conversation to

Add from Asset Library

New Topic

4. Configure the Topic as follows:

Field	Value
-------	-------

1	Topic Label	Customer Experience Support
2	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.
3	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.
4	Instruction	If a customer would like more information on Activities or Experiences, you should search for the related Experience__c records and summarize the output. Do not share information about available slots, Ids or Record Numbers.

5. Click on **Next**
6. Do **not** select any actions.
7. Click **Finish**.

Step 4: Create custom service agent action

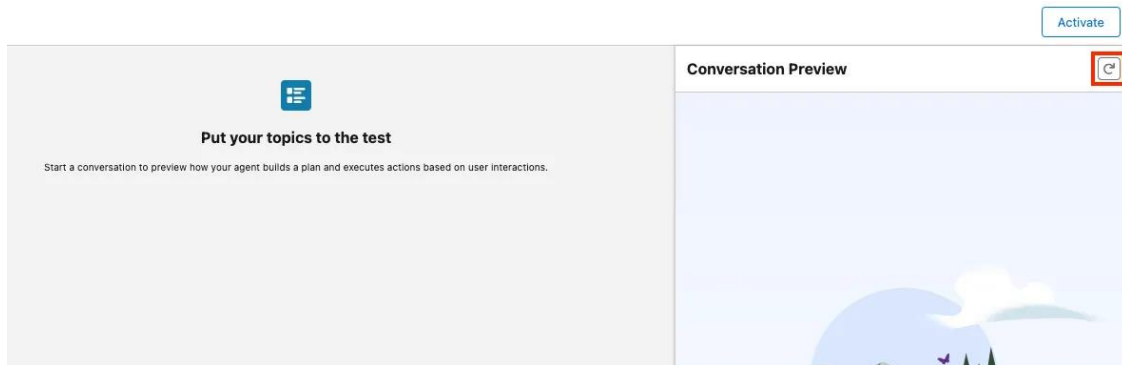
You can create custom actions for your agent using Flow, Apex, or prompts to access data in Salesforce. In this exercise, you will create a custom action to retrieve experience details using an existing flow called *Get Experience Details*.

1. In Agent Builder, select the **Customer Experience Support** topic.
2. Click on the **This Topic's Actions** tab in the topic details.
3. Click on the **New** drop down and click on **Create New Action**.
4. Configure the action as follows:

	Field	Value
1	Reference Action Type	Flow
2	Reference Action	Get Experience Details
3	Agent Action Label	Keep default
4	Agent Action API Name	Keep default

5. Click **Next**.
6. Uncheck **Show loading text for this action**.
7. Leave the default instructions in.
8. Check **Require input** for the `experienceName` input.
9. Check **Show in Conversation** for the `experienceDetails` output.
10. Click **Finish**.

11. Test out the instructions in the Conversation Preview. If prompted that you are about to use Einstein, click on **Got It**.
12. Click on the **refresh** button to reset the conversation.
13. Enter this prompt in the dialog box:



Can you let me know more about the full moon beach party experience?

14. Press your Return/Enter key and notice the response, which gives information about that party.
- In the planner, notice that the reasoning engine first selected the **Customer Experience Support** topic, then the **Get Experience Details** action you just created.
15. Click on **Activate** to activate the Agent
 16. Click the Back button on the top left corner to exit the Agent Builder.

Select Topic

#

Customer Experience Support *(Customer_Experience_Support)*

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.

> Instructions 1

> Actions 1

Select Action

0.43 sec

Get Experience Details *(Get_Experience_Details)*

Input

```
{
  "experienceName": "Full Moon Beach Party"
}
```

Output

```
{
  "experienceRecord": {
    "sObjectInfo": {
      "apiName": "Experience__c",
      "label": "Experience"
    }
  }
}
```

Agent Response

<>

👁

```
{
  "message": "Here are the details for the Full Moon Beach Party experience. How else can I assist you?",
  "data": [
    {
      "type": "copilotActionOutput/Get_Experience_Details",
      "message": "Here are the details for the Full Moon Beach Party experience. How else can I assist you?"
    }
  ]
}
```

You have just configured a Service Agent.

Extend Agent with Flow Action

Step 1: Create the Agent Custom Action

You can extend Agent with custom actions built with Flow, Apex, or prompts. In this exercise, you extend your agent with a custom action powered by another Flow. This custom action allows customer service representatives to issue resort credits to guests. You can use the flow, **Issue Resort Credit** which is installed in your org.

1. In the Setup Quick Find, search for and select **Agent Actions**(under Agent Studio).
2. Click **New Agent Action**.
3. Configure the action as follows:

	Field	Value
1	Reference Action Type	Flow

2	Reference Action	Issue Resort Credit
3	Agent Action Label	Keep default
4	Agent Action API Name	Keep default

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

Issue Resort Credit

* Agent Action Label

Issue Resort Credit

* Agent Action API Name

Issue_Resort_Credit

Cancel

Next

- Click **Next**.
- Uncheck **Show loading text for this action**.
- Leave the instructions with the default values.
- Check **Require Input** for both inputs (`amount` and `contactId`).
- Check **Show in conversation** for the `creditId` output.

Create an Agent Action

1 amount

amount

*** Instructions** ⓘ

The amount of the resort credit.

Data Type

lightning__numberType

☒ Require input

☐ Collect data from user

1 creditId

creditId

*** Instructions** ⓘ

The id of the Credit record that was created.

Data Type

lightning__textType

☐ Filter from agent action

☒ Show in conversation

2 contactId

contactId

*** Instructions** ⓘ

The Id of the Contact the credit will be issued to.

Data Type

lightning__textType

☒ Require input

☐ Collect data from user

Back

✓
○

Finish

9. Click **Finish**.

Step 2: Add the Action to Your Agent

1. In the Setup Quick Find, search for and select **Agents**(under Agent Studio).
2. Click on the **Agentforce (Default)** in the list of agents at the bottom.
3. Click **Open in Builder**.
4. Click **Deactivate** to deactivate the agent so that you can add your new custom action.
5. In the **Topics** sidebar, click the **Customer Experience Support** topic.
6. Click the **This Topic's Actions** tab.

#

← Topic Details

→I X

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Topic Configuration

This Topic's Actions

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Add your topic's details, including when and how to use the topic and the actions associated with it.

















📡

* Topic Label

Customer Experience Support

7. Click **New** button and click **Add from Asset Library**.
8. Check the **Identify Record by Name** and **Issue Resort Credit** actions, then click **Finish**.

Add Available Actions

<input type="checkbox"/>	 Get Case By Case Number	Returns a case associated with a given con...
<input type="checkbox"/>	 Get Delivery Time Slots	Returns a list of available time slots to sch...
<input type="checkbox"/>	 Get Order By Order Number	Returns the order information associated ...
<input type="checkbox"/>	 Get Orders By Contact	Returns a list of orders associated with a gi...
<input type="checkbox"/>	 Get Record Details	Generates a text blob containing record de...
<input type="checkbox"/>	 Get Reservation Time Slots	Returns a list of available time slots for the ...
<input type="checkbox"/>	 Identify Customer By Email	Identify a customer by their email address ...
<input type="checkbox"/>	 Identify Object by Name	Finds the Salesforce object API name by e...
<input checked="" type="checkbox"/>	 Identify Record by Name	Searches for Salesforce CRM records by n...
<input type="checkbox"/>	 Identify User Permissions by N...	Get the names of the most relevant require...
<input checked="" type="checkbox"/>	 Issue Resort Credit	Issue a resort credit for a Contact
<input type="checkbox"/>	 Label a Record	Assign or apply a label to another CRM reco...
<input type="checkbox"/>	 Log a Call	Save a call based on the user input by iden...
<input type="checkbox"/>	 Look Up a Slack User	Given a Salesforce user ID, looks up the co...
<input type="checkbox"/>	 Query Records (Beta)	Finds and retrieves Salesforce CRM record...
<input type="checkbox"/>	 Query Records with Aggregate	Answers aggregation questions (such as a...

Cancel

Finish

Step 3: Try it out

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

Issue \$100 resort credit to contact named Sofia Rodriguez

In the planner, notice that the reasoning engine first selected the **Identify Record By Name** action, then the **Issue Resort Credit** action you just created.

Select Action0.72 sec

Identify Record By Name

Searches for Salesforce CRM records by name and returns a list of matching Salesforce CRM record IDs.

Input

```
{
  "recordName": "Sofia Rodriguez",
  "objectApiName": "Contact"
}
```

Output

```
{
  "searchResults": [
    {
      "sObjectInfo": {
        "apiName": "Contact",
        "id": "0034U000003HYZXgQAP"
      }
    }
  ]
}
```

Select Action0.67 sec

Issue Resort Credit

Input

```
{
  "amount": "100",
  "contactId": "0034U000003HYZXgQAP"
}
```

Output

```
{
  "creditId": "a044U000002Tw06lQAF"
}
```

Reasoning

GROUNDING: The response accurately reflects the actions taken in the function history, including identifying the contact and issuing the resort credit.

2. Launch Coral Cloud Resorts app using the App Launcher, navigate to the contact record for **Sofia Rodriguez**.
3. Click the **Related** tab.
4. Scroll down and verify that you see the resort credit you just issued using your agent.
(**Note:** If Credits is not found in the Related tab, Add it to the Contact Page Layout from the Credit__c Object setup)

Credits (1)

1 item • Updated a few seconds ago

New

Change Owner

<div><input type="checkbox"/></div>	Record Number <div>▼</div>	Amount <div>▼</div>	Created Date <div>▼</div>	Created By <div>▼</div>
1	<div><input type="checkbox"/></div> C-00000000	\$100	10/11/2024, 5:48 AM	OrgFarm Epic <div><div></div></div>
<div>View All</div>				

Extend Agent with Apex Action

Coral Cloud Resorts front-desk employees need an easy way to check the weather, so that they can recommend experiences based on the weather forecast. In this exercise, you'll create a custom action using an Invocable Apex class that allows your agent to invoke a third-party weather API.

Step 1: Create the Apex class

1. From Setup, search for **Apex** and click **Apex Classes**.
2. Click **New** button and copy-paste the following code to create **CheckWeather** Apex class.

```
public with sharing class CheckWeather {
    @InvocableMethod(
        label='Check Weather'
        description='Check weather at Coral Cloud Resorts at a
specific date. The date must be in the future, not today or
earlier.'
    )
    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;

        // Call a weather service to retrieve the weather
through an API call
        WeatherService.Weather weather =
WeatherService.getResortWeather(
            dateToCheck
```

```
);
```

```
// Create the response for the agent
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 Resorts.';
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 Resorts location for the provided date'
    )
    public Decimal minTemperature;
    @InvocableVariable(
        description='Maximum temperature in Celsius at Coral
Cloud Resorts location for the provided date'
    )
    public Decimal maxTemperature;
    @InvocableVariable(
        description='Description of temperatures at Coral
Cloud Resorts location for the provided date'
    )
    public String temperatureDescription;
}
}
```

The `getWeather()` method is defined as an `@InvocableMethod` so it can be invoked by your agent. The method returns a `WeatherResponse` object. The attributes of the `WeatherResponse` class are defined as `@InvocableVariable`. The descriptions in both `@InvocableMethod` and `@InvocableVariable` are important because they allow your agent to understand how to use the action.

3. Click **Save**.

Step 2: Create the agent custom action

1. From Setup, open **Agents Actions**.
2. Click **New Agent Action**.
3. Configure the action as follows:

	Field	Value
1	Reference Action Type	Apex
2	Reference Action Category	Invocable Methods
3	Reference Action	Check Weather
4	Agent Action Label	Keep default
5	Agent Action API Name	Keep default

4. Click **Next**.
5. Uncheck **Show loading text for this action**.
6. Notice that the instructions fields are pre-filled based on the descriptions provided in the Apex code.
7. Check **Collect data from user** for the input (`dateToCheck`).
8. Check **Show in conversation** for the `temperatureDescription` output.
9. Click **Finish**

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

Apex

* Reference Action Category

Invocable Methods

* Reference Action

>

 Check Weather

×

* Agent Action Label

Check Weather

* Agent Action API Name

Check_Weather

Cancel

Next

Step 3: Add the Action to Your Agent

1. In the Setup Quick Find, search for and select **Agents**(under Agent Studio).
2. Click on the **Agentforce (Default)** in the list of agents at the bottom.
3. Click **Open in Builder**.
4. Click **Deactivate** to deactivate the agent so that you can add your new custom action.
5. In the **Topics** sidebar, click the **Customer Experience Support** topic.
6. Click the **This Topic's Actions** tab.

#

← Topic Details

Topic Configuration

This Topic's Actions

Add your topic's details, including when and how to use the topic and the actions associated with it.

* Topic Label

Customer Experience Support

- Click **New** button and click **Add from Asset Library**.
- Check the **Check Weather** action and click **Finish**.

Add Available Actions

Select the actions you want to include in your topic.

12 items • Sorted by Agent Action Label(asc)

<input type="checkbox"/>	Agent Action Label ↑	Instructions
<input checked="" type="checkbox"/>	Check Weather	Check weather at Coral Cloud Resort at a s...
<input type="checkbox"/>	Draft or Revise Email	Creates an email draft or revises the latest ...
<input type="checkbox"/>	Get Activities Timeline	Retrieve a timeline of all CRM activities ass...
<input type="checkbox"/>	Get Activity Details	Provides data about an activity record (Cal...
<input type="checkbox"/>	Get Record Details	Generates a text blob containing record de...
<input type="checkbox"/>	Identify Object by Name	Finds the Salesforce object API name by e...

Cancel

Finish

Step 4: Try it out

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

Check the weather for tomorrow

The screenshot displays the Einstein Copilot Agent Builder interface. The top navigation bar includes 'Agent Builder' and 'Einstein Copilot' tabs, along with a 'Deactivate' button. The main workspace is divided into two panels. The left panel, titled 'Engages and interacts with the user about any request related to the resort...', contains sections for 'Instructions' (1) and 'Actions' (10). The 'Check Weather' action is highlighted with a red box. Below this, the 'Input' and 'Output' JSON data is shown. The 'Input' is a JSON object with 'dateToCheck': '2024-09-28'. The 'Output' is a JSON object with 'maxTemperature': 32.3, 'minTemperature': 17, and 'temperatureDescription': 'Temperatures will be between 17.0°C'. The right panel, titled 'Conversation Preview', shows a simulated conversation. It starts with a system message: 'Hi! I'm Einstein, an AI assistant. I can do things like search for information, summarize records, and draft and revise emails. What can I help you with?'. This is followed by a user message: 'Check the weather for tomorrow'. The system then responds with: 'The weather for tomorrow at Coral Cloud Resort will have temperatures between 17.0°C (62.6°F) and 32.3°C (90.1°F). How else can I help?'. A 'Copy' button is visible below the response. At the bottom of the preview panel is a text input field with the placeholder 'Describe your task or ask a question...'.

Examine the planner and note that the reasoning engine selected the **Check Weather** action to fulfill the request.

2. Click the **back arrow button** to go back to setup.

That's how easy it is to extend agents with custom actions powered by Apex.

Create Your Own Agent

Create a new Agent

The default Agentforce Agent is available for you to distribute to your internal Salesforce users. You have just configured and extended the Agent with flow and apex actions. You can also create custom Agents that you can use just about anywhere else you want - Slack, Website, etc.. Adding a new agent is as simple as clicking a button and adding details.

1. In the Setup Quick Find, search for and select **Agents**.
2. Click **+New Agent**.
3. Click **Agentforce Service Agent** to select it and click **Next**.

4. Deselect all of the pre-created topics and click **Next**.
5. Set field values as follows:

	Field	Value
1	Topic Label	Coral Cloud Service Agent
2	Description	This is the Coral Cloud Agent that helps customers learn more about Experiences as well as book sessions.
3	Role	The agent's job is to assist users in navigating and managing bookings for different experiences offered by Coral Cloud Resorts, ensuring a seamless customer service experience by providing accurate information and resolving issues promptly.
4	Company	Coral Cloud Resorts is a fictitious seaside resort that manages guests and their reservations. It offers a rich set of experiences.
5	Agent user	New Agent User
6	Enrich event logs with conversation data	TRUE

6. Click **Next**.
7. Click **Create**.

TIP

Each agent has a designated running user and will have access to all of the data and metadata that that user can see. Ensure that you start with a [minimum access profile](#) and only give the agent access to the data that it needs.

Agent Name	Type	Description	Active	Created By	Last Modified	
Agentforce (Default)	Employee	An AI assistant f...			Mar 11, 2025	▼
Coral Cloud Service Agent	Service Agent	This is the Coral ...			Mar 11, 2025	▼

Optional: Add Get Experience Details action to your new Agent.

You have just created a custom Service Agent that can now be deployed anywhere you want - Slack, Website, etc. You can extend this agent by creating topics and actions. You can create actions by using flows, apex, or prompt templates. You can learn more by exploring the below resources.

Resources

[Trailhead: Build an AI Agent with Agentforce](#)