



Hands On Training

Extend Agentforce with Custom Actions

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About me - Pato Sapir



- <https://www.linkedin.com/in/patosapir/>
- Solutions Consultant
- Started working with Salesforce Marketing Cloud in 2012
- Salesforce MVP & Marketing Champion
- Co-leader for Cleveland Marketer's Trailblazer Community
- Founder of Devs United: www.devsutd.com
- And now founder of .ext: www.exthq.com
- Amateur Beekeeper



<https://www.youtube.com/@PatoSapirOK>

<https://github.com/psapir>



<https://mcsnippets.herokuapp.com/>

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www.exthq.com



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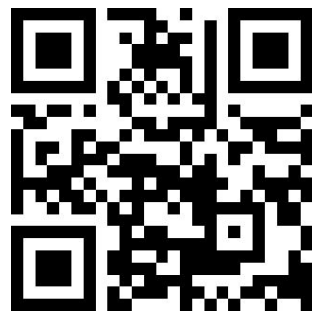
Octopai

Multivariate content testing for
Marketing Cloud powered by AI.

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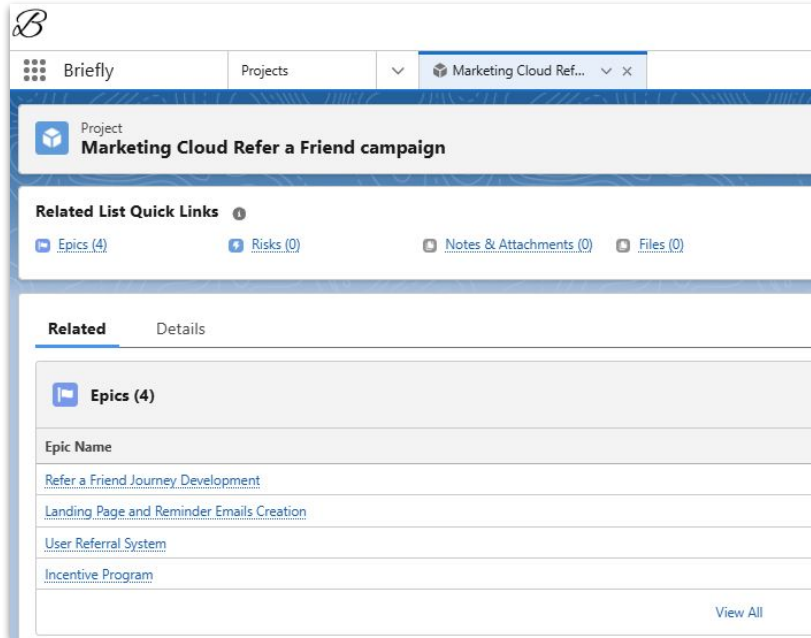
How will this Hands On Training work?

- We will work off my github repo:
<https://github.com/psapir/mwd-25-agentforce-workshop/>
- We will solve a Use Case together
- For each section we will look at a little bit of theory/explanation and then practice
- Each exercise will be timed to keep track of the Hands on Training
 - Level 1 - Setup (10 minutes)
 - Level 2 - Creating a Prompt Template (10 minutes)
 - Level 3 - Creating a Flow Custom Action (15 minutes)
 - Level 4 - Creating an Apex Custom Action (10 minutes)
 - Final Level - Putting it all together! (15 minutes)
 - Q&A
 - Final Raffle of prizes!



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The use case we will solve: Briefly!

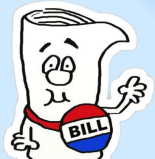
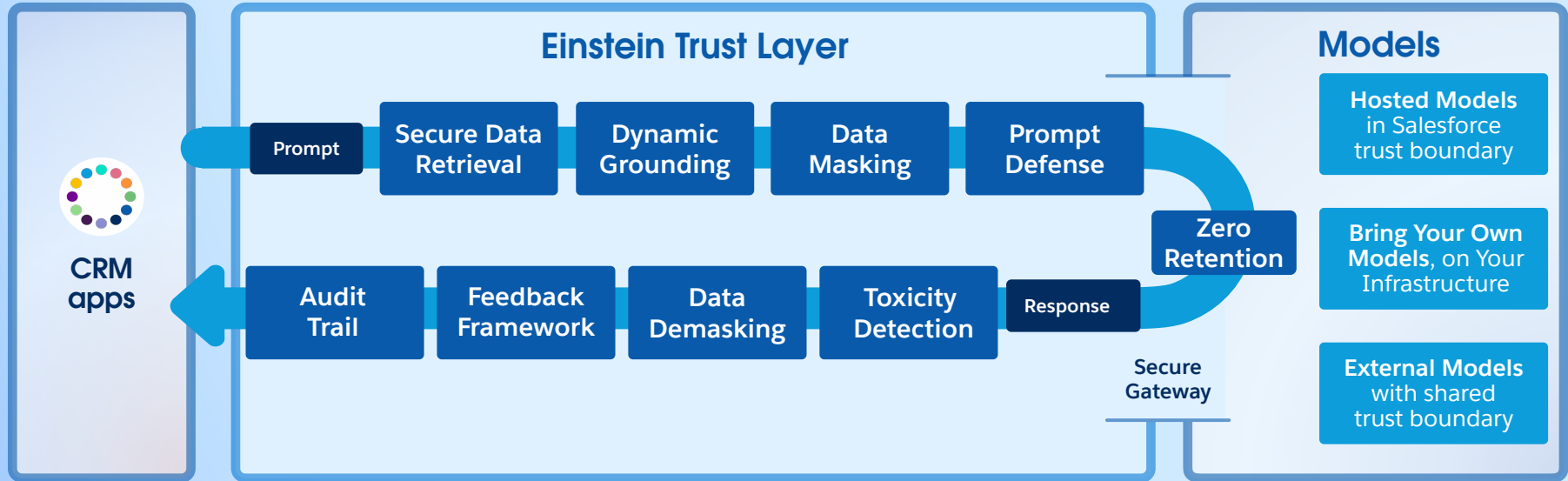


- Helps document project requirements and risks, no matter the project size.
- Utilizes Agentforce to help you come up with project's success indicators.
- Utilizes Agentforce to come up with suggestions for epics, stories and risks.
- Utilizes Agentforce to generate documentation for the project to share with your team.

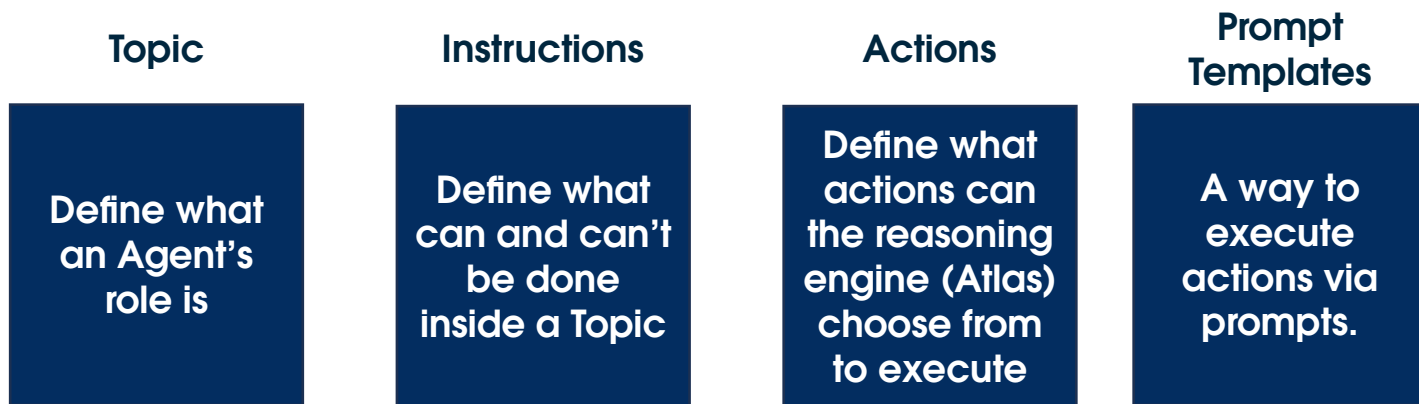
How agents work



How a Prompt becomes an outcome



Fundamental building blocks of Agentforce



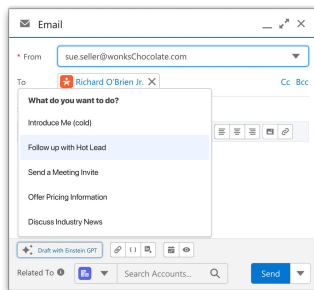
Level 1 - Setup (10 minutes)



Level 2 - Prompt Templates

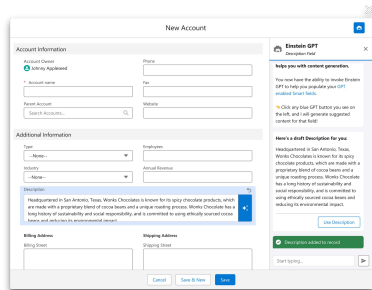
What are Prompt Templates?

Sales Email



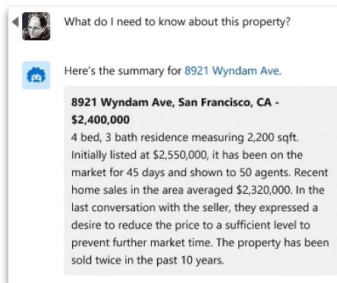
Auto-create highly personalized and relevant emails grounded on CRM data with a single click

Field Generation



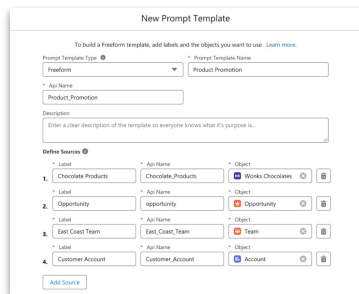
Enable single-click actions to auto-generate summaries, descriptions and other field values grounded on CRM data

Record Summary



Customize the default summarization Copilot action for any object based on field data, activity history, and related records

Flex



Create custom prompt templates that ground on multiple objects and can be called as an invocable action in any business process

Working with Prompts

Simple Example:

Write an email welcoming a guest for their upcoming stay at a luxury hotel.

Better Example:

Your name is **Jane**. You work in the guest success team at **Coral Cloud Resorts**, a luxury beachfront resort.

Write an email welcoming the guest for their upcoming stay.

Guest name: **John Smith**.

Check-in date: **05/01/2024**.

Write a story that paints the picture of infinite possibilities at the resort and that weaves in some of the resort experiences that match the guest's interests.

List of resort experiences matching the guest's interests:

- **Aqua Fitness in Paradise**
- **Tropical Snorkel**
- **Sunset Cruise**

But what if we could make it dynamic?

Your name is {{Sender.Fullname}}.

You work in the guest success team at {{Organization.Fullname}}.

Write an email welcoming the guest for their upcoming stay.

Guest name: {{Guest.FullName}}.

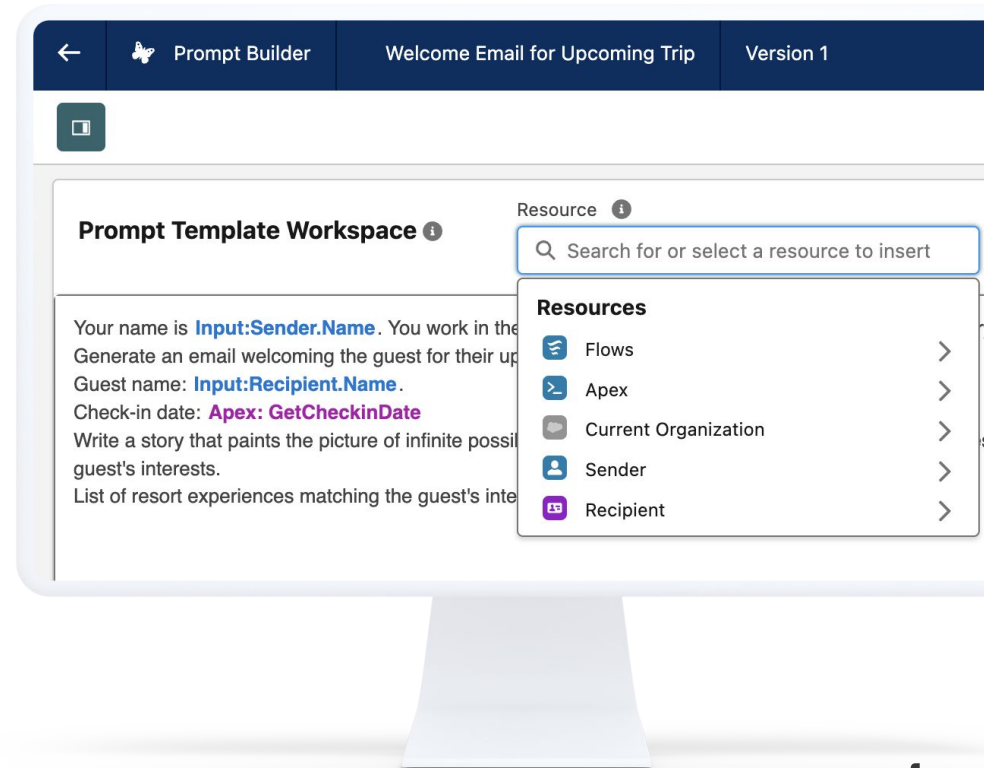
Check-in date: {{Guest.CheckinDate}}.

Write a story that paints the picture of infinite possibilities at the resort and that weaves in some of the resort experiences that match the guest's interests.

List of resort experiences matching the guest's interests:
{{ExperienceList}}.

Prompt Dynamic Grounding

- Record Data
- Related Lists
- Flows
- Apex
- Data Cloud
- MuleSoft



Level 2 - Creating a Prompt Template (10 minutes)

Level 3 - Actions

Actions Overview

Standard Actions

Cloud Actions



Platform Actions



Custom Actions



Prompt Template



Flow



External Service
MCP



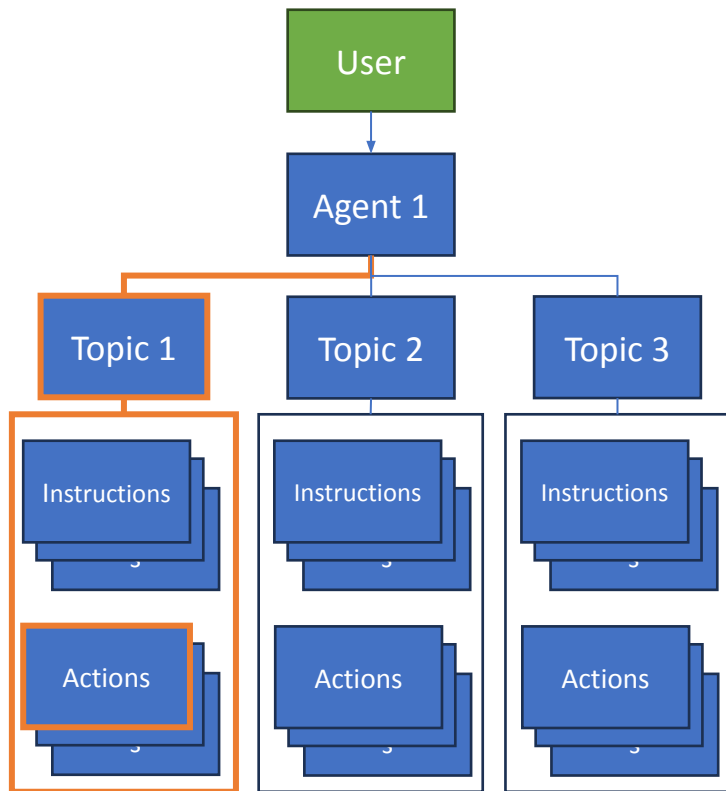
Apex

More info on actions:

https://help.salesforce.com/s/articleView?id=sf.copilot_actions_ref.htm&type=5



Topics, Instructions and Actions



The screenshot shows the 'Topic Details' configuration window. It has two tabs: 'Topic Configuration' (selected) and 'This Topic's Actions'. Below the tabs, there is a link icon and text: 'To edit this topic, create a custom version. Your changes apply only to this agent.'

The configuration fields include:

- * Topic Label:** General CRM
- Topic API Name:** GeneralCRM
- * Classification Description:** Engages and interacts with the user about any request that could be CRM data related. This could be tasks such as identify and summarize records, answer queries, aggregate data, find and query objects, update records, or drafting and refining emails.
- * Scope:** Your job is to interact and answer questions for the user about anything Salesforce or CRM data related, combining all data retrieval functions. i.e: QueryRecords, GetRecordDetails(), GetActivitiesTimeline(), GetActivityDetails(), WebSearch()

On the right side, there is a section titled 'Instructions' with a sub-header 'The following instructions are used to run this topic.' Below this, there are several instruction cards:

- * Instruction:** There are multiple available data retrieval functions at your disposal. You can use each one of them multiple times if needed. You should use functions as many times as necessary until you have all the data required.
- * Instruction:** Do not declare your intent i.e. "I will now retrieve the data" - Just fetch the data.
- * Instruction:** Identify the object type (i.e., leads, opportunities, accounts) the user asks about. If unclear, confirm with the user.
- * Instruction:** When only the name of a record is mentioned in the user request, you MUST call the IdentifyRecordByName action.
- * Instruction:** Always call QueryRecords & QueryRecordsWithAggregate passing plain natural language.
- * Instruction:** For accounts and contacts, combine the WebSearch action with the CRM data retrieval actions. MUST

Level 3 - Creating a Flow Custom Action (15 minutes)

Level 4 - Apex Custom Actions

Apex Custom Actions

- Requires an InvocableMethod.
- Output can be used by Agent.
- Annotations are very important for Agent context and to find actions easily.

```
WhatsAppSFMCEService.cls
public with sharing class WhatsAppSFMCEService {

    @InvocableMethod(label='Send WhatsApp Message' description='Sends a WhatsApp Message utilizing the WhatsApp API')
    public static void sendMessage(List<MessageRequest> requests)
    {
        for (MessageRequest req : requests) {
            sendWhatsAppFuture(req.message, req.mobileNumber);
        }
    }

    private static void sendMessage(String message, String mobileNumber) {
        String authToken = authenticate();
        String sfmceDomain = "YOUR_SFMCE_REST_DOMAIN_HERE";
        Blob b = Crypto.GenerateAESKey(128);
        String h = EncodingUtil.ConvertToHex(b);

        public class MessageRequest {
            @InvocableVariable(label='Message' required=true)
            public String message;

            @InvocableVariable(label='Mobile Number' required=true)
            public String mobileNumber;
        }
    }
}
```

Invocable Method Annotation:

https://developer.salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/apex_classes_annotation_InvocableMethod.htm

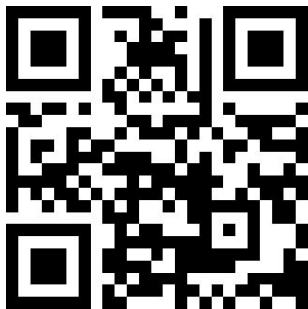
Level 4 - Creating an Apex Custom Action (10 minutes)

Final Level - Putting it all together! (15 minutes)

Wrap-up

- When working with prompts, understand prompt basics, experiment and test!
- Consider Agentforce usage pricing and implementation.
- Think about how Agentforce can Augment your team not replace it (Rebrand AI term to: **A**ugmented **I**ntelligence not **A**rtificial **I**ntelligence).
- Think about other use cases to solve with Briefly and play with it. You don't need an actual project to learn!
 - Can you create a button that executes an Agent Action?
 - Can you make it so it will identify and create risks?
 - Can you use RAG to search through meeting notes and come up with missing requirements?

Resources



- **This deck and workshop:**
<https://github.com/psapir/mwd-25-agentforce-workshop/>
- **Agentforce Actions:**
https://help.salesforce.com/s/articleView?id=sf.copilot_actions_ref.htm&type=5
- **Invocable Methods:**
https://developer.salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/apex_classes_annotation_InvocableMethod.htm
- **Invoke Agents with Apex:**
<https://developer.salesforce.com/blogs/2025/04/invoke-agentforce-agents-with-apex-and-flow>
- **Agentforce workshops:**
<https://developer.salesforce.com/agentforce-workshop>

Enough with AI, let's do an old school raffle!



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Q&A



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Thanks!

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