Build Your Own Agent

<https://trailhead.salesforce.com/content/learn/trails/get-ready-for-agentforce>

<https://trailhead.salesforce.com/content/learn/trails/build-ai-assistants-with-einstein-copilot>

| 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. |
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| 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. |
| 6th Instruction | If asked to recommend experiences that a user might be interested in, use the 'Generate Personalized 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. |