Account Planning Agent

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Introduction

Welcome to Your Account Planning Agent (APA). The Account Planning Agent automates creation, enrichment, and summarization of Account Plans in Salesforce using Apex services, custom metadata-driven guidance by user role, GenAI Functions/Plugins for orchestration, and LWCs for UI. It calculates KPIs, detects changes, guides SWOT analysis per role, checks for existing plans, and saves consolidated summaries back to Account records.

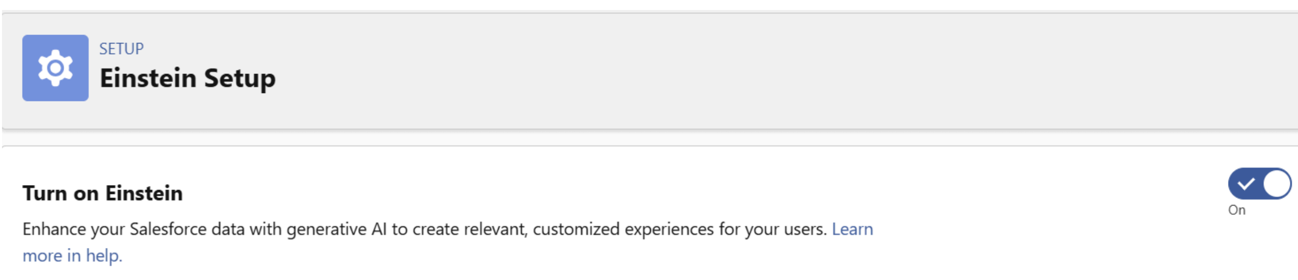
User Personas

- **Admins:** Responsible for configuration, setting up einstein, Activating agent and adding permission sets.
- **End Users:** Interact with the agent for Account planning, SWOT and planning tasks.

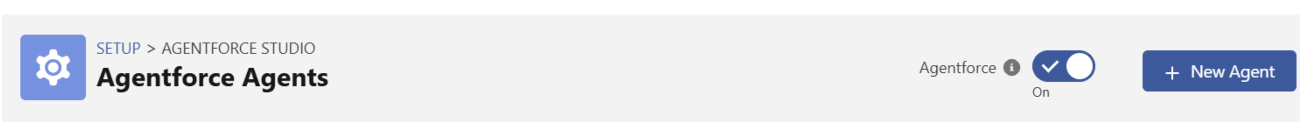
1. Pre-Requisite

Ensure your Salesforce environment and user permissions are ready to support autonomous agents.

1. **Salesforce Edition:** Enterprise, Performance, or Unlimited Edition (with Agentforce enabled).
2. **Permissions:**
   - System Administrator access to install packages.
   - Manage Agents and Customize Application permissions.
3. **Feature Activation:**
   - Go to Setup > Einstein Setup and toggle Einstein to ON and Refresh.

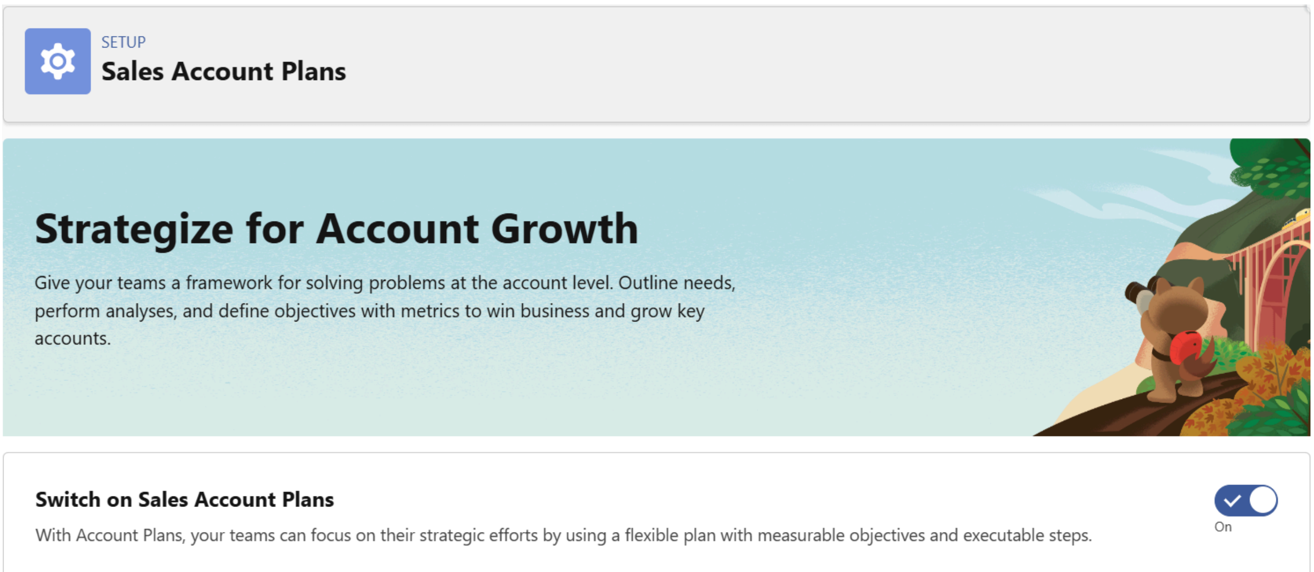


   - Go to Setup > Agentforce Agents and ensure Agentforce is enabled.

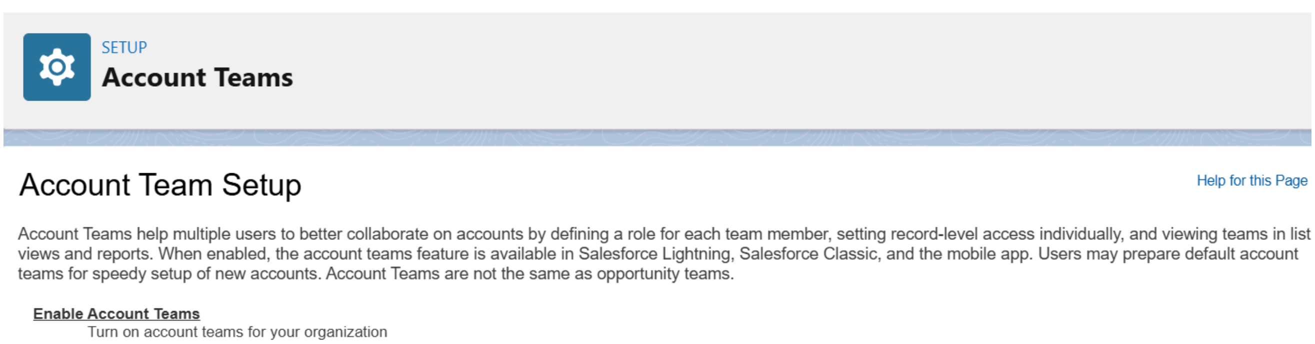


4. Data Readiness:

- Ensure the Account Plan object is enabled. Go to Setup > Sales Account Plans and toggle Switch on Sales Account Plans to ON.



- Ensure the Account Teams is enabled. Go to Setup > Account Teams and Click Enable Account Teams.



5. **Agent Exchange Access:** Navigate to the AppExchange and look for the Agent Exchange tab or category to locate the specific "Account Planning Agent" listing.

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2. Installation & Setup (Admin Focused)

Step by Step Installation

1. **Navigate to the Agent**: Open AppExchange > AgentExchange > Search for "Account Planning Agent."
2. Click the **[Get It Now]** (or **[Try It]**) button, and log in to your Salesforce Trailblazer account when prompted.
3. Choose your target environment.
4. Select your preferred security settings. For the easiest setup process, choose **Install for All Users**, and then click **[Install]**.
5. **Success!** Depending on your org's size, the installation may take a few minutes. Once the process finishes, you will receive an email confirmation from Salesforce letting you know the application is installed and ready to configure.

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3. Admin Configuration Steps

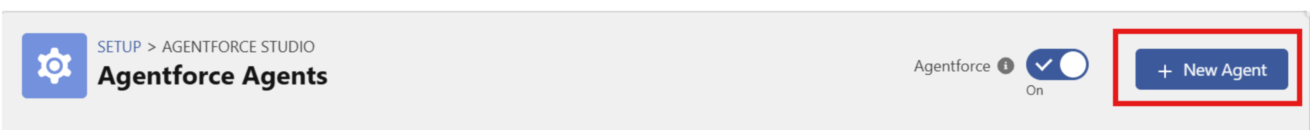
Post installation Checklist

1. Agent Setup

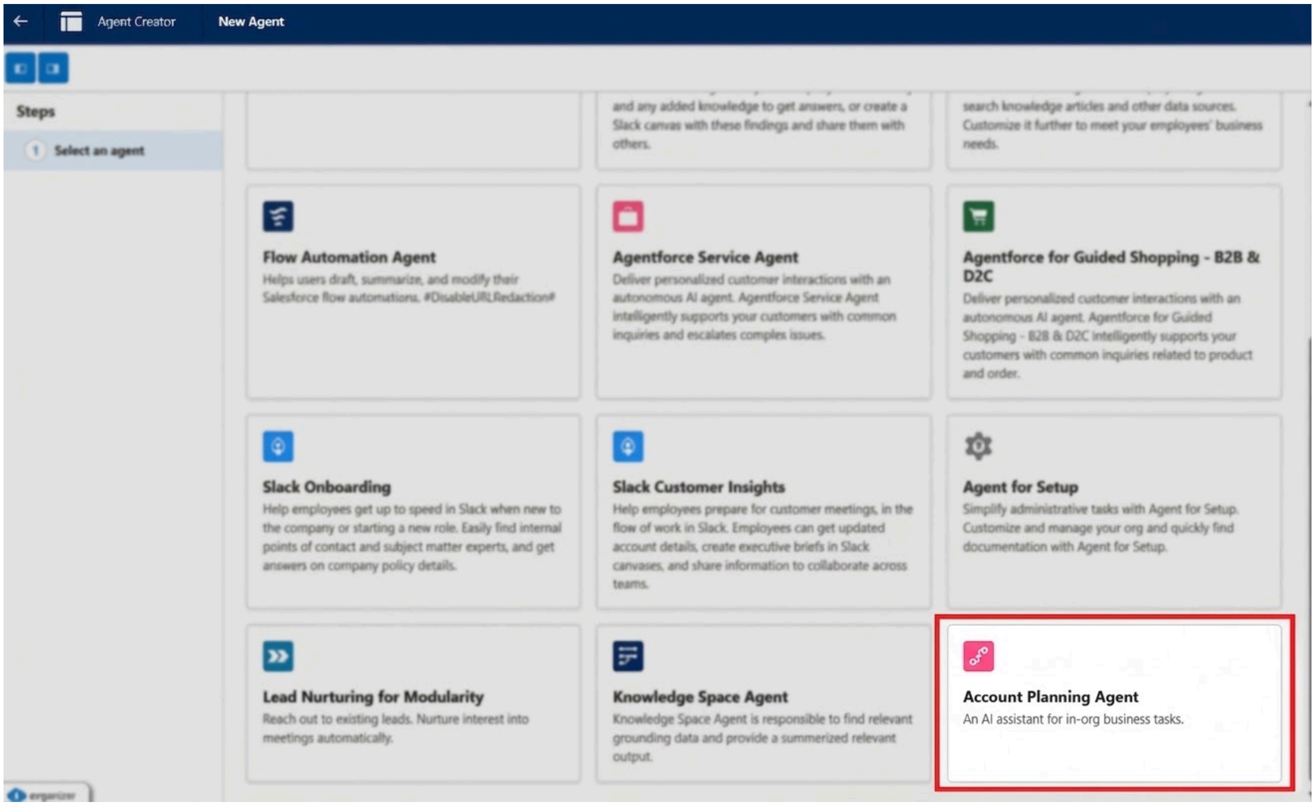
Installation is merely the initial step. You must now "hook" the agent Template into your business logic.

1. **Configure the "Reasoning" (Agentforce Builder):**

- Go to Setup > Agentforce Agents.
- Click on New Agent.



- Under the Create from a Template tab, Select “Account Planning Agent” as your template, then click Next > Next > Enter Role & company Name, again click Next.



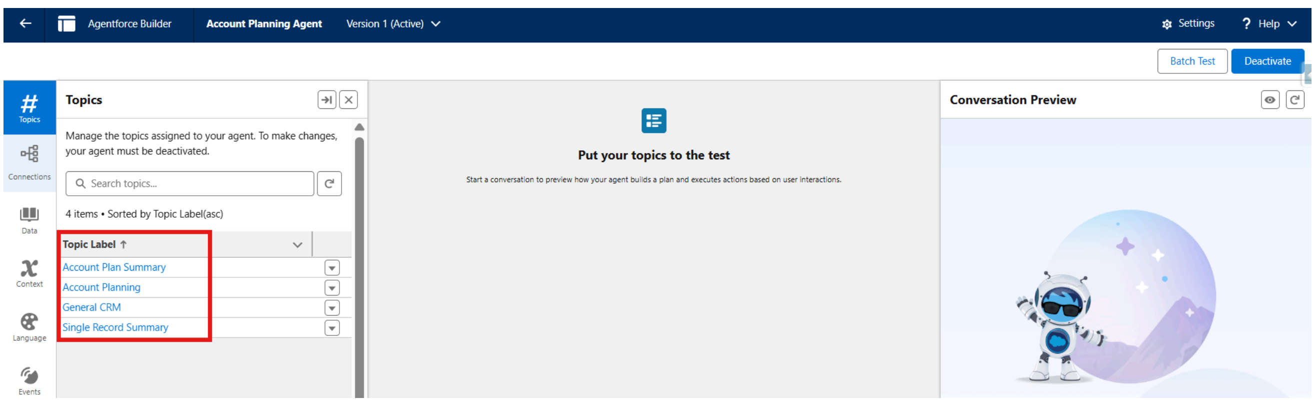
- Select the languages required & tone of the agent & then click Create.
- Once created, Agent will be available under agent list in AgentForce Agents.
- Click on "Account Planning Agent" > Open In Builder.

2. You will need to create a few Context Variables which are used in actions.

- Click on **Context > New Variable**.
- Create all the variables listed in the table & map those variables to the actions as specified.

- Ensure the agent includes the following standard topics: 'Single record summary' and 'General CRM'. If these topics are missing, add them.

- Once all the variables are added, the Account Planning Agent is ready for use. Make Sure to **activate the agent**.



Add below listed Context Variables to the Agent

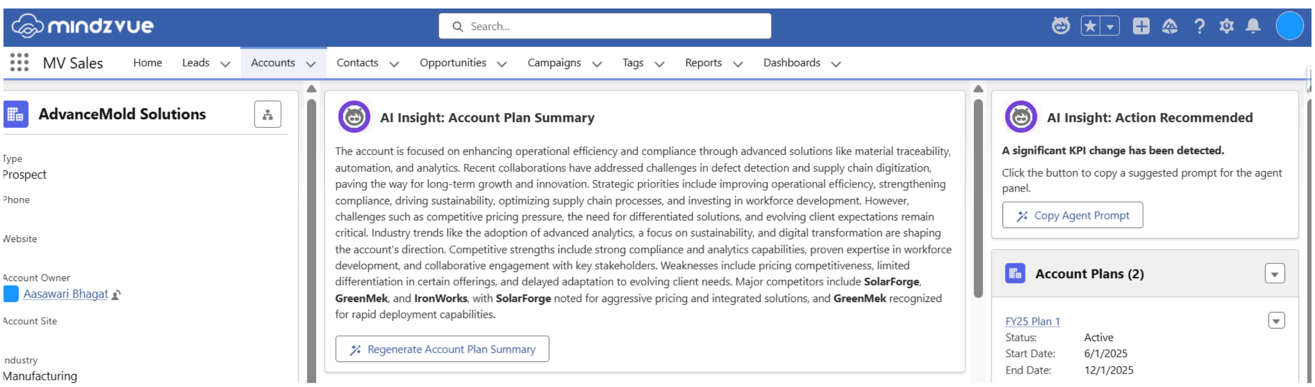
Name	Description	Data Type	Allow value to be set by API	Allow LLM to use value	Assign or Map This Variable
Current Record Id	The ID of the record on the user's screen. It may not relate to the user's input. Only use this if the user input	Text	True	true	Account Planning > Get SWOT analysis instructions by role > opportunityAgentInstruction

	mentions 'this', 'current', 'the record', etc. If in doubt, don't use it.				
Current App Name	Salesforce Application Name.	Text	True	true	
Current Page Type	Type of Salesforce Page.	Text	True	true	
canCreateAccountPlan		Boolean	false	true	Account Planning > Get SWOT analysis instructions by role > canCreateAccountPlan
opportunityAgentInstruction		Text	false	true	Account Planning > Get SWOT analysis instructions by role > opportunityAgentInstruction
strengthAgentInstruction		Text	false	true	Account Planning > Get SWOT analysis instructions by role > strengthAgentInstruction
threatAgentInstruction		Text	false	true	Account

					Planning > Get SWOT analysis instructions by role > threatAgentInstructio
userRole		Text	false	true	Account Planning > Get SWOT analysis instructions by role > userRole
weaknessAgentInstruction		Text	false	true	Account Planning > Get SWOT analysis instructions by role > weaknessAgentInstruction
accountId		Text	false	true	Account Planning > Get SWOT analysis instructions by role > accountId

2. Component Setup

- Access the Account record page and click on the 'Setup' gear icon, then select 'Edit Page'.
- Locate the two LWC components included in the package: accountPlanSummary and kpiChangeDetector.
- Drag and drop these components onto the desired location on the record page.
- Once placed, click 'Save' and then 'Activate' the page.



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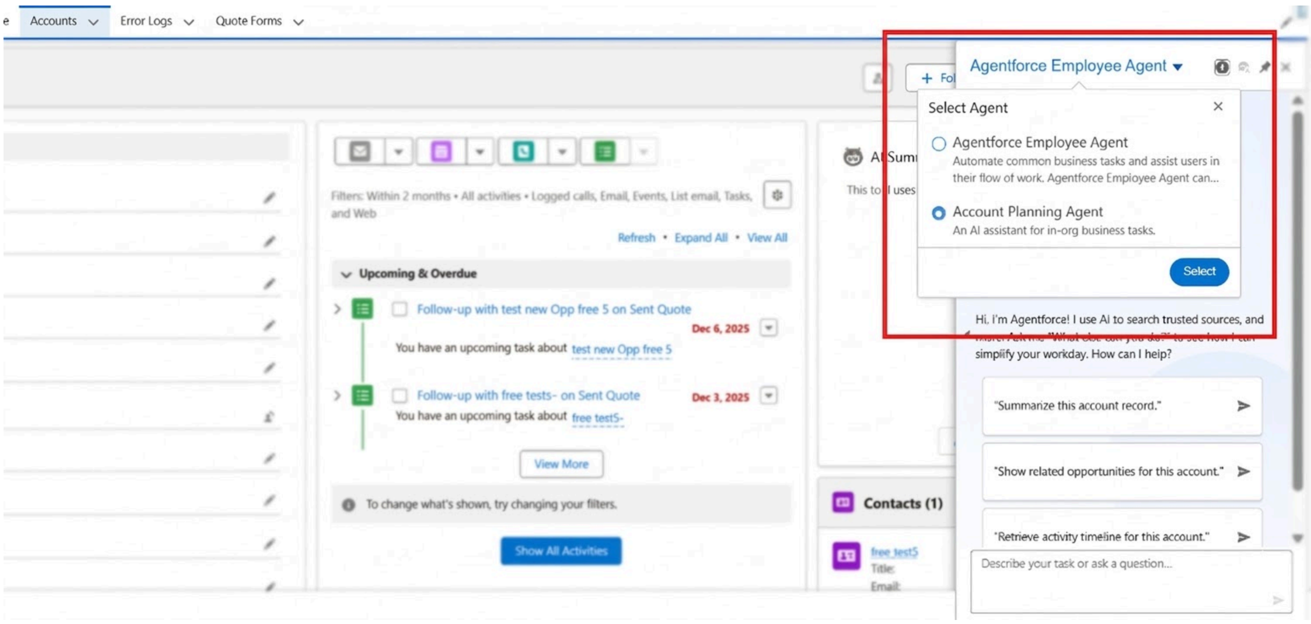
3. Navigate to the APA

- Open the **App Launcher** and search for the **Accounts.**

- Click on Agentforce Icon.
- If You Already Have an Employee agent enabled, then Account Planning agent will be available in the dropdown.



4. Troubleshooting & Support

- **Support Contact:** Reach out to our team at acp-support@mindZvue.com for further assistance.