Oracle Fusion Service

How do I set up a workflow to manage service requests using AI Agents?

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G42557-07

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1 Implementation Summary

Implementation Overview

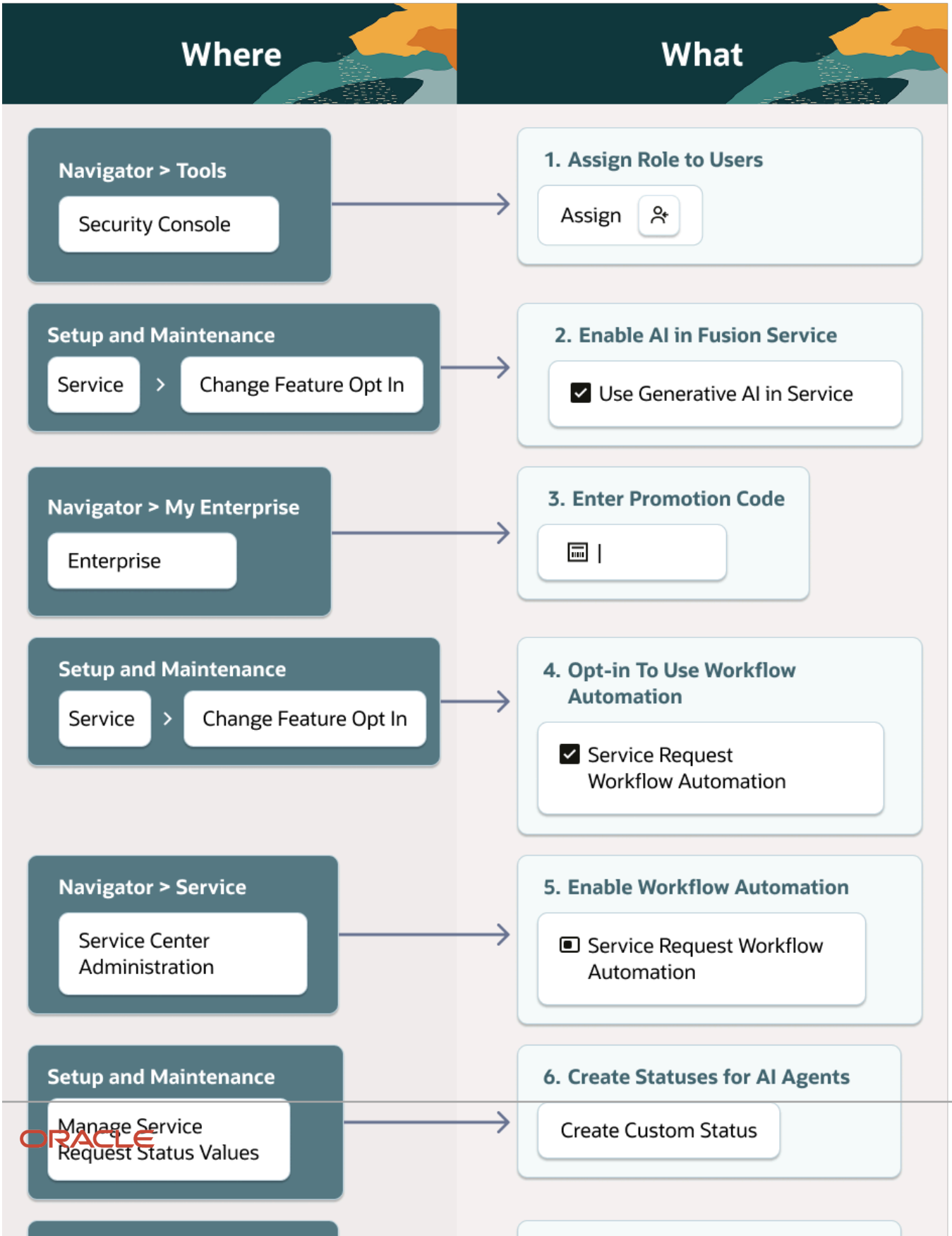
You can use this playbook to set up workflows in Oracle Fusion Service to leverage AI Agents to manage your customer service requests.

At a high-level, this is what you need to do:

- *Grant Required Roles and Privileges*
- *Enable Generative AI Features in Fusion Service*
- *Enable Workflow Automation*
- *Create Custom Statuses for Agentic AI Orchestration*
- *Configure Groovy Scripts to Enable Agenting Orchestration*
- *Configure Action Plan Actions*
- *Load Contextual Data*
- *Create a Workflow*
- *Verify the Workflow*

This diagram explains the configuration steps required for using AI Agents in a Fusion Service workflow:

Configuration Steps



What You Will Be Able to Do After Completing the Setups

After you complete the setups, your service agents should be able to:

- Triage a service request by reviewing, editing, and sending the response email composed by the Service Request Triage Agent
- Mark a service request as resolved after reviewing, editing, and sending the response email composed by the Service Request Resolution Agent

Before You Start

You should have subscribed to Oracle Fusion Service and have received the email with your environment and initial sign in information.

Case Study

In this playbook, a case study is used to define the scope of the Fusion Service workflow to use AI agents to manage service requests.

The case study is based on a fictitious company named Vision Corp., a global high-tech company that sells laptop and multiple server product lines to businesses and other organizations. Vision Corp. would like to leverage AI capabilities to help their service agents to manage service requests effectively by using the Service Request Triage Agent and the Service Request Resolution Agent.

> **Note:** In this example, the workflow is triggered based upon an SR created through email. However, you've full flexibility to determine the conditions under which the workflow is triggered.

This flowchart illustrates how Vision Corp. uses AI agents in Fusion Service to manage their customer service requests.

Service Request Workflow

Service Request Triage AI Agent

Triage in progress

Human in Loop
Send triaged email to customer

Triage waiting

Triage done

Service Request Resolution AI Agent

Resolution in progress

2 Service Request AI Agents

In this case study, we use:

- **Service Request Triage Agent**: This AI agent lessens the resolution time drastically by categorizing and evaluating incoming SRs to ensure they contain sufficient information for effective processing. This AI agent:
  - Understands customer issue and intent
  - Identifies and requests for additional information
  - Classifies SR to its right product and category
  - Detects SR severity and customer sentiment
- **Service Request Resolution Agent**: This AI agent reduces the human agent workload and handling time by responding with recommended resolution steps. This AI agent:
  - Searches for knowledge articles related to the incoming SR
  - Searches for similar SRs for the resolution steps
  - Generates a summary of solution steps suitable to send to the customer
  - Recommends a solution to the customer after human agent review

3 Configure Your Environment for Using AI Agents

You need to have the following job roles to configure your environment:

- Application Implementation Consultant
- IT Security Manager

Perform these tasks to configure your environment:

- *Grant Required Roles and Privileges*
- *Enable Generative AI Features in Fusion Service*
- *Enable Workflow Automation*
- *Create Custom Statuses for Agentic AI Orchestration*
- *Configure Groovy Scripts to Enable Agenting Orchestration*
- *Configure Action Plan Actions*
- *Load Contextual Data*

Grant Required Roles and Privileges

- You need to have the following duty role to use the generative AI features in Fusion Service:
  - ORA_SVC_GEN_AI_USER

    By default, all admin roles are granted this duty role.
- You need to have the following privileges to use the triage and resolution AI agents:
  - SVC_ACCESS_CRM_AUTOMATION_AGENT_APIS_PRIV (Service)
  - SVC_ACCESS_HRHD_AUTOMATION_AGENT_APIS_PRIV (HRHD)
  - SVC_ACCESS_ISR_AUTOMATION_AGENT_APIS_PRIV (Internal HD)

- You need to have the following job role to administer workflows:
  - ORA_SVC_WORKFLOW_ADMINISTRATOR_JOB

    > **Note:** You need to grant this job role if you are on release 25B or 25C. It isn't required for release 25D and later.

    To grant this job role to a user:

    i. Navigate to **Tools** > **Security Console**.
    ii. In the **Search** drop-down list, select **Roles and Permission Groups**.

    > **Note:** If you don't see the "Roles and Permission Groups" drop-down list, you need to enable this option as follows:
    >
    > a. In **Setup and Maintenance**, click  , and search and select the **Manage Administrator Profile Values** task.
    > b. In the **Profile Option Code** field, enter ORA_ASE_SAS_INTEGRATION_ENABLED, and click **Search**.
    > c. Select the **Profile Value** as **Yes** and click **Save**.

    iii. Search and select the ORA_SVC_WORKFLOW_ADMINISTRATOR_JOB job role.
    iv. Click the down arrow, select **Edit Role**, click **Users**, and add the user to this job role.

Enable Generative AI Features in Fusion Service

> **Note:** This step is applicable for release 25B and 25C. You can skip this step for release 25D and later.

1. Go to **Setup and Maintenance**, select the **Service** offering, and click **Change Feature Opt In**.
2. In the row for **Service Adaptive Intelligence**, click the edit icon under the **Features** column.
3. In the row for **Use Generative AI features in Service**, select the check box under the **Enable** column, and click **Done**.

Enable Workflow Automation

1. Enter the promotion code:

   > **Note:** This step is applicable for release 25B and 25C. You can skip this step for release 25D and later.

   a. Navigate to **My Enterprise** > **Enterprise**.
   b. Click the **Manage Promotion Codes** link and click **Enter Promotion Code**.
   c. Enter the promotion code and click **Save and Close**.

The application displays "Service Request Workflow Automation Promotion Code" in the list of promotion codes.

2. Opt-in to use workflow automation:

   Note: This step is applicable for release 25B and 25C. You can skip this step for release 25D and later.

   a. Go to **Setup and Maintenance**, select the **Service** offering, and click **Change Feature Opt In**.
   b. In the row for **Productivity Tools**, click the edit icon under the **Features** column.
   c. In the row for **Service Request Workflow Automation**, select the check box under the **Enable** column, and click **Done**.
3. Enable workflow automation:
   a. Navigate to **Service** > **Service Center Administration**.
   b. Click the **Productivity** card and click the **Manage Workflow Preferences** card.
   c. Enable the **Enable/Disable Workflow** option.

Create Custom Statuses for Agentic AI Orchestration

To orchestrate Service Request Triage Agent and Service Request Resolution Agent in resolving incoming service requests you need to create some service request statuses. Each status represents a specific phase in the service request triage and resolution process. When a status is updated, it triggers the appropriate agent to perform the designated tasks.

In **Setup and Maintenance**, click the  icon, search and select the **Manage Service Request Status Values** task, and create the required custom service request statuses. Here are a few examples:

Status Type	Status Label	Description
New	TRIAGE_REQUIRED	Indicates that the Triage Agent needs to be invoked to triage/assess and categorize the incoming service request.
In Progress	TRIAGE_IN_PROGRESS	Indicates that the Triage Agent is actively analyzing the Service Request.
	TRIAGE_DONE	Indicates that the Triage Agent has completed the triage process, and the Service Request is ready for the next steps.
	RESOLUTION_REQUESTED	Marks the initiation of Resolution Agent, whose purpose is to propose a solution for Service Request based on knowledge articles and similar service requests.
	RESOLUTION_IN_PROGRESS	Indicates that the Resolution Agent is currently working on a resolution.
	RESOLUTION_SUGESSTED	Indicates that the Resolution Agent has suggested a resolution and is awaiting review and validation by a human agent.
Waiting	TRIAGE_WAITING	Represents a state when the Triage Agent needs additional information to triage the

Status Type	Status Label	Description
		Service Request. In this state, Triage Agent has drafted an email to the requester of the SR, and has prompted a human agent via recommendation panel, to review the email content and send it to the requester.

Configure Groovy Scripts to Enable Agenting Orchestration

You need to use Groovy scripts to orchestrate Triage Agent and Resolution Agent. However, if you want to use the Triage Agent and the Resolution Agent individually, then Groovy scripts are not needed.

Here's how you can create a Groovy script:

1. Navigate to **Configuration** > **Sandboxes**.
2. Create a sandbox and select **Application Composer**.
3. Navigate to **Objects** > **Standard Objects** > **Service Request** > **Messages** > **Server Scripts** and select **Triggers**.
4. Create a new trigger and add the following Groovy script in the trigger's body.

```
// Before insert trigger on message object.
if (MessageTypeCd == 'ORA_SVC_AI_SYSTEM_NOTE') { def msgContent = MessageContent
if (msgContent != null && msgContent.toString().contains("\"workflowCode\":\"sr.triage.agent.workflow
\"")){
if(msgContent.toString().contains("\\\"vague\\\":\\\"no\\\"") && (msgContent.toString().contains("\\
\"additionalInformation\\\":null") || msgContent.toString().contains("\\\"additionalInformation\\\":
[]"))){
ServiceRequest?.StatusCd = 'TRIAGE_DONE'
 }
else {
 ServiceRequest?.StatusCd = 'TRIAGE_WAITING'
 }
 }
}
// This groovy script is needed for Workflow Orchestration. The intent is to update SR Status to
 TRIAGE_DONE, when Customer replies with additional information requested by Triage Agent, which will
 kick off other workflow.
if ((MessageTypeCd == 'ORA_SVC_CUSTOMER_ENTRY') && (ServiceRequest?.StatusCd == "TRIAGE_WAITING"))
{
ServiceRequest?.StatusCd = "TRIAGE_DONE"
}
```

5. Click **Validate** and after validating the script, save and close.
6. Publish the sandbox.

Configure Action Plan Actions

Action plan actions enable Triage and Resolution AI agents to display recommendations in the SR.

To configure the action plan actions, you need to:

- *Configure Profile Options*

- *Set the Visibility*

Configure Profile Options

1. In **Setup and Maintenance**, click  , and search and select the **Manage Administrator Profile Values** task.
2. Configure the required profile options.
    - For Triage Agent:

Stripe Code	Profile Option	Profile Option Value
CRM	ORA_SVC_TRIAGE_AP_DEFAULT_AGENT_ACTION	0RA_SVC_TRIAGE_ACT_101 - Triage Plan
HR Help Desk	ORA_SVC_TRIAGE_AP_DEFAULT_HRHD_AGENT_ACTION	0RA_SVC_TRIAGE_ACT_102 - Triage Plan
ISR	ORA_SVC_TRIAGE_AP_DEFAULT_ISR_AGENT_ACTION	0RA_SVC_TRIAGE_ACT_103 - Triage Plan

    - For Resolution Agent:

Stripe Code	Profile Option	Profile Option Value
CRM	ORA_SVC_AP_DEFAULT_AGENT_ACTION	0RA_SVC_ACT_101 - Resolution Plan
HR Help Desk	ORA_SVC_AP_DEFAULT_HRHD_AGENT_ACTION	0RA_SVC_ACT_102 - Resolution Plan
ISR	ORA_SVC_AP_DEFAULT_ISR_AGENT_ACTION	0RA_SVC_ACT_103 - Resolution Plan

3. Click **Save**.

Set the Visibility

1. In **Setup and Maintenance**, click  , and search and select the **Manage Action Plan Actions** task.
2. Search for the required plan:
    - For the Triage agent, search for "Triage Plan" and click the Triage Plan for your stripe.
    - For the Resolution agent, search for "Resolution Plan" and click the Resolution Plan for your stripe.
3. Set the value of **Visibility** to **Customer Visible** and click **Save**.

Load Contextual Data

In addition to the LLM, Triage and Resolution AI Agents need access to enterprise data specific to your business. This provides context, so that the predictions and suggestions from AI are precise and optimal. The contextual data includes:

- Knowledge articles

- Resolved service requests
- SR category list*
- Service product catalog*

where * indicates that the marked contextual data is not needed for the Resolution Agent setup.

This involves manually uploading the contextual data (except Knowledge Articles) to a RAG tool.

To load contextual data, you need to:

- *Upload Resolved Service Requests*
- *Upload Categories*
- *Upload Products*

Upload Resolved Service Requests

You need to perform the following steps to upload resolved SRs:

- *Grant Roles and Permissions*
- *Export Resolved SRs to .csv File*
- *Upload .csv File to a Dummy SR as an Attachment*
- *Get Attachment documentIdentifier*
- *Generate fusion-ai Token*
- *Initiate RAG*
- *Add a RAG Document*
- *Index RAG Document*

Grant Roles and Permissions

Ensure that you have:

- Application Implementation Consultant role
- The following permission groups:
  - oraCommonFusionAISecurityAuthorization_read_Rag_OraResource
  - oraCommonFusionAISecurityAuthorization_create_Rag_OraResource
  - oraCommonFusionAISecurityAuthorization_update_Rag_OraResource
  - oraCommonFusionAISecurityAuthorization_delete_Rag_OraResource

Export Resolved SRs to .csv File

1. Navigate to **Service** > **Service Center** > **My Open Service Requests**.
2. Select resolved service requests with filled-in Category, Product, and Solution Description fields.
3. Click **Actions** > **Export** > **Export to CSV**.
4. Save the .csv file to your computer.
5. Open the .csv file for editing:
   a. The required SR columns are SR Number, Title, Problem Description, Solution Description.
   b. Rename Solution Description to Resolution Description.
6. Save and close the .csv file.

Upload .csv File to a Dummy SR as an Attachment

Create an SR and attach the .csv file. This is necessary to obtain a document ID for the next step.

Get Attachment documentIdentifier

Get the attachment `documentIdentifier` using a tool such as Postman.

```
GET <fusion_url>/crmRestApi/resources/11.13.18.05/serviceRequests/{SR_NUMBER}/child/Attachment
```

For example:

```
<fusion_url>/crmRestApi/resources/11.13.18.05/serviceRequests/SR0000096349/child/Attachment
```

Here's a sample `documentIdentifier`:

00020000000EACED00057708000110F0A00C30C20000000EACED00057708000110F0A00AE1FC

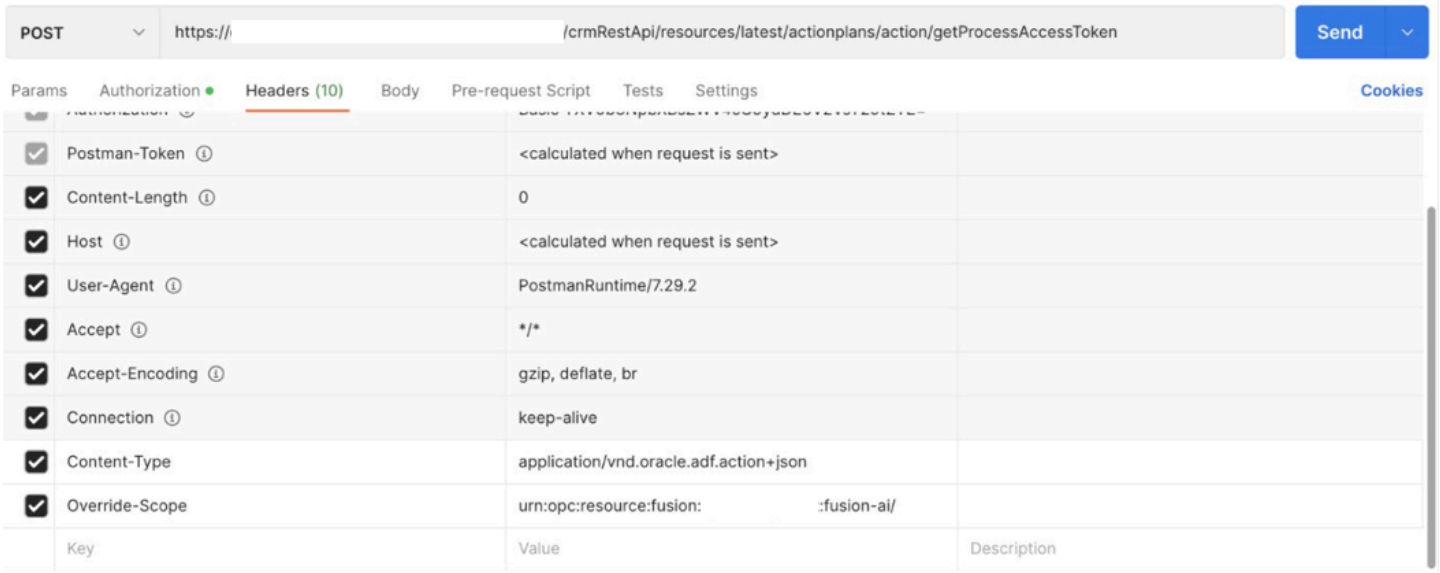
Generate fusion-ai Token

You need a `fusion-ai` token to initiate a RAG use case and index RAG documents.

1. Assign the following RAG related permission groups to the user via Security Console:
    - oraCommonFusionAISecurityAuthorization_read_Rag_OraResource
    - oraCommonFusionAISecurityAuthorization_create_Rag_OraResource
    - oraCommonFusionAISecurityAuthorization_update_Rag_OraResource
    - oraCommonFusionAISecurityAuthorization_delete_Rag_OraResource
2. Generate the `fusion-ai` token using a tool such as Postman:
   `POST <fusion_url>/crmRestApi/resources/latest/actionplans/action/getProcessAccessToken`

   Headers:
    - Content-Type: `application/vnd.oracle.adf.action+json`
    - Override-Scope: `urn:opc:resource:fusion:<pod_name>:fusion-ai/`
    - Authorization: Select Basic Auth and use the same user that you assigned RAG permission groups in the previous steps.

Here's a screenshot showing how to generate the `fusion-ai` token using Postman.



Initiate RAG

Initiate RAG using a tool such as Postman. This is a one-time activity.

```
POST https://<fusion_url>/api/fusion- ai/orchestrator/rag/v1/initialization
```

Payload:

```
{ "useCase": "crm.svc.service_request_triage_agent_find_similar_service_requests" }
```

Here's a screenshot showing how to initiate RAG using Postman.

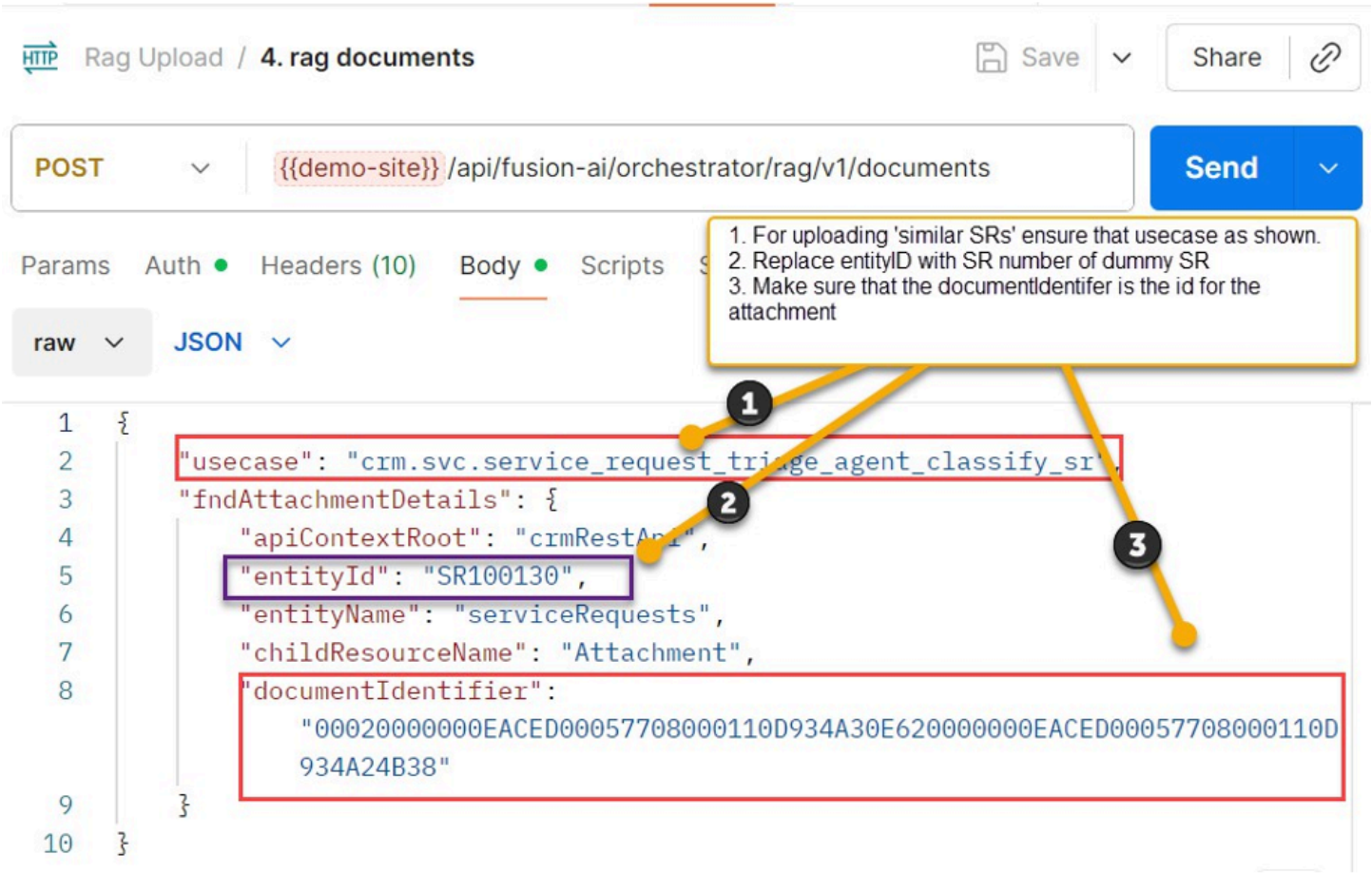
Add a RAG Document

Add the RAG document using a tool such as Postman.

```
POST https://<fusion_url>/api/fusion- ai/orchestrator/rag/v1/documents
```

1. Ensure that the usecase is as shown in the screenshot.
2. Replace the `entityID` with SR number of the dummy SR.
3. Use the ID of the attachment for the `documentIdentifier`.

Here's a screenshot showing how to add a RAG document using Postman.



Index RAG Document

Index the RAG document using a tool such as Postman.

```
POST <env url>/api/fusion-ai/orchestrator/rag/v1/documents
```

Payload:

```
{
 "usecase":"crm.svc.service_request_triage_agent_find_similar_service_requests",
 "fndAttachmentDetails": {
 "apiContextRoot":"crmRestApi",
 "entityId":"<SR_created_step3.2>",
 "entityName":"serviceRequests",
 "childResourceName":"Attachment",
 "documentIdentifier":"<documentIdentifier_retrieved_in_previous_steps>"
```

```
    }
}
```

Upload Categories

1. Export category to .csv file with the following columns:
    - CategoryCode
    - CategoryName
    - ParentCategoryCode
    - Description
2. Upload the file to a dummy SR as an attachment.
3. Get the `documentIdentifier` for the attachment.
4. Generate a fusion-ai token to initiate the RAG use case and ingest the document.
5. Initiate the RAG use case:

```
POST <env url>/api/fusion-ai/orchestrator/rag/v1/initialization
payload:{ "useCase": "crm.svc.service_request_triage_agent_classify_sr"}
```

6. Add a RAG document:

```
POST {{host}}/api/fusion-ai/orchestrator/rag/v1/documents
Payload:{"usecase": "crm.svc.service_request_triage_agent_classify_sr","fndAttachmentDetails":
{"apiContextRoot": "crmRestApi","entityId":
 "<srNumber>","entityName":"<entityname>","childResourceName": "Attachment","documentIdentifier":
 "<docId>"}}
```

Upload Products

1. Export product to .csv file with the following columns:
    - ProductName
    - ProductId
    - Description
2. Upload the file to a dummy SR as an attachment.
3. Get the `documentIdentifier` for the attachment.
4. Generate a fusion-ai token to initiate the RAG use case and ingest the document.
5. Initiate the RAG use case:

```
POST <env URL>/fusion-ai/orchestrator/rag/v1/initialization
payload:{ "useCase": "crm.svc.service_request_triage_agent_find_product"}
```

6. Add a RAG document:

```
POST {{host}}/api/fusion-ai/orchestrator/rag/v1/documents
Payload:{"usecase": "crm.svc.service_request_triage_agent_find_product","fndAttachmentDetails":
{"apiContextRoot": "crmRestApi","entityId":
 "<srNumber>","entityName":"<entityname>","childResourceName": "Attachment","documentIdentifier":
 "<docId>"}}
```

4 Create a Workflow

Watch video

Note: Google might require you to sign in before you can watch videos hosted on YouTube. For more information, refer to *this FAQ*.

Here's how you can create the workflow for our use case:

1. Create the workflow:
    a. Navigate to **Service** > **Service Center Administration**.
    b. Click the **Productivity** card and click the **Create/Manage Workflows** card.
    c. Click **Create**.
    d. Enter a name for the workflow template. For example, "Triage and Resolve SR".
    e. Select the **Entity Name** as **Service Request**.
2. Define a condition for service requests created through email channel:
    a. Click **When this happens** and select **Service Request is created**.
    b. Click the **+** icon and select **Attribute is**.

    A new row "and when Attribute is Value" is added.
    c. Click **Attribute** and select **Channel Type**.
    d. Click **Value** and select **E-Mail**.
3. Add the SR triage AI agent:
    a. Hover your cursor over the play icon and click the **+** icon.
    b. Click **Actions Catalog** and select **Service Request Triage Agent**.

    You can now see the **Action Group 1** box with the triage agent in it.
4. Update the SR status to indicate that triage is in progress:
    a. Hover your cursor over the **Service Request Triage Agent** and click the **+** icon.
    b. Click **Actions Catalog** and select **Triage in progress**.
5. Update the SR status to indicate that the triage is done:
    a. Hover your cursor over the right border of the **Action Group 1** box and click the **+** icon.
    b. Click **Actions Catalog** and select **Triage done**.

    You can now see **Action Group 2** indicating that the triage is done.
6. Add the SR resolution AI agent:
    a. Hover your cursor over the right border of the **Action Group 2** box and click the **+** icon.
    b. Click **Actions Catalog** and select **Service Request Resolution Agent**.

    You can see **Action Group 3** with the resolution agent in it.
7. Update the SR status to indicate that resolution is in progress:
    a. Hover your cursor over the **Service Request Resolution Agent** and click the **+** icon.
    b. Click **Actions Catalog** and select **Resolution in progress**.
8. Update the SR status to indicate that the resolution is suggested:

a. Hover your cursor over the right border of the **Action Group 3** box and click the **+** icon.
b. Click **Actions Catalog** and select **Resolution suggested**.

9. Click **Save and Deploy**.

Now that you have configured your workflow, you can *verify the workflow*.

5 Verify the Workflow

It's now time to verify your workflow:

1. As a customer, send an email to the customer support email ID.
2. As a service agent, verify that an SR was created for the email:
    a. Navigate to **Service** > **Service Center**.
    b. Verify that an SR was created for the email sent in step 1.
3. As a service agent, verify that the Service Request Triage Agent has provided a suggestion:

    a. Open the SR.
    b. In the **Triage Plan** section, click **Review**.

    You can see the suggested email draft composed by the Service Request Triage Agent.
    c. Review and modify the suggestions and click **Send**.

    This sends the email to the customer.
4. As a customer, review the response and reply to the email.
5. As a service agent, verify that the Service Request Resolution Agent has provided a suggestion:
    a. In the **Resolution Plan** section, click **Review**.

    You can see the suggested email draft composed by the Service Request Resolution Agent.
    b. Review and modify the suggestions, and update the **Status**, **Outcome**, and **Resolution Code**.
    c. Click **Resolve**.

Congratulations! You have successfully configured the AI workflow to manage service requests.

6 Optional Steps

Customize and Extend Service AI Agents Used in Your Workflow

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Our out of the box AI agents should suffice for regular service request management. However for specific business requirements, you may want to customize and extend these out of the box service AI agents.

To customize an out of the box AI agent:

1. Create a custom agent by making a copy of an existing AI agent:
   a. Navigate to **Tools** > **AI Agent Studio**.
   b. Search for the AI agent and click **Copy Template**.
   c. Enter an agent team suffix, such as "_copy", and click **Continue**.
   d. Customize this agent by removing existing tools or adding new ones.
2. Create a tool:
   a. Click the **Tools** tab and click **Add**.
   b. Provide the required details.

      For example, to create a document tool, select **Tool Type** as **Document**, set the status to **Ready to publish**, add the required documents, and save.
   c. Click **Create**.
3. Create an agent:
   a. Click the **Agents** tab and click **Add**.
   b. Provide the required details.

      For example, in the **Prompt** field you can write a prompt asking the agent to answer a question using both the built-in Knowledge Search tool and the custom tool you created in the previous step.
   c. To add formatting requirements, click the **LLM** tab, for **Summarization Mode** select **Enable using custom prompt**, and provide the instructions in the **Summarization Prompt** field.
   d. Click **Create**.
   e. Search for the required tool, click + , and click **Add**.
   f. Click **Create**.
4. Create an agent team:
   a. Click the **Agent Teams** tab and click **Add**.
   b. Provide the required details and click **Create**.
   c. Search for the agent you created in previous step, click + , and click **Add**.

d. Click  to test your agent team.
e. Click **Publish**.

5. Configure your custom agent:
   a. Click the **Agent Teams** tab.
   b. Search for the custom agent you created in step 1, and click the Edit icon.
   c. Click on the Agents icon and click  next to **New Supervisor Agent** to coordinate the activities between the agents.
   d. Update the prompt instructions to include the required agents and click **Create**.
   e. Search and add the custom agent team you created in the previous step.
   f. Click  to test your custom agent team.
   g. Click **Publish**.

Create Custom AI Agents and Add Them to Your Workflow

Watch video

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Our out of the box AI agents should suffice for regular service request management. However for specific business requirements, you may want to create custom service AI agents.

To create a custom AI agent and add it to your Fusion Service workflow:

1. Create a tool:
   a. Navigate to **Tools** > **AI Agent Studio**.
   b. Click the **Tools** tab and click **Add**.
   c. Provide the required details.

      For example, to create a document tool, select **Tool Type** as **Document**, set the status to **Ready to publish**, add the required documents, and save.
   d. Click **Create**.
2. Create an agent:
   a. Click the **Agents** tab and click **Add**.
   b. Provide the required details.

      For example, in the **Prompt** field you can write a prompt asking the agent to answer a question using both the built-in Knowledge Search tool and the custom tool you created in the previous step.
   c. To add formatting requirements, click the **LLM** tab, for **Summarization Mode** select **Enable using custom prompt**, and provide the instructions in the **Summarization Prompt** field.
   d. Click **Create**.

e. Search for the required tool, click  , and click **Add**.
f. Click **Create**.

3. Create an agent team:
   a. Click the **Agent Teams** tab and click **Add**.
   b. Provide the required details and click **Create**.
   c. Search for the agent you created in previous step, click  , and click **Add**.
   d. Click  to test your agent team.
   e. Click **Publish**.
4. Create an action type to make your custom AI agent available in Fusion Service:
   a. Navigate to **Service** > **Service Center Administration**.
   b. Click the **Productivity** card and click the **Add / Manage Workflow Action Types and Actions** card.
   c. Click **Create Action**.
   d. For **Select Parent Entity Name**, select "Service request".
   e. Click **Add Action Type** and provide the required details. For example:
      - For **Action Type Name**, enter a name such as "my_custom_ai_agent".
      - For **Action Type Object Type**, you see "Service request".
      - For **Application**, you see "Oracle Fusion Applications".
      - For **Authentication Context**, you see "Oracle CRM Fusion REST API".
      - For **ActionType**, you see "Rest".
      - For **Operation**, you see "Create".
      - For **Action URL**, enter "/api/fusion-ai/orchestrator/agent/v1/<my_custom_agent_team_name>/invokeAsync".
      - For **Description**, enter a description such as "This is my action type".
   f. Click **Continue**.
   g. On the Action (Payload) page provide the required details. For example:
      - For **Action Name**, enter a name such as "my_custom_agent_action".
      - For **Async Mode**, select "Async with Polling".
      - Add attributes and headers, if required.
   h. Click **Continue**.
   i. On the Polling Action page provide the required details. For example:
      - For **Endpoint URL for Polling request action**, enter "/api/fusion-ai/orchestrator/agent/v1/<my_custom_agent_team_name>/status/".
      - For **Request Id in the Endpoint URL**, enter "requestId".
   j. Click **Submit**.
5. Verify that you can add the custom AI agent to a Fusion Service workflow:
   a. Navigate to **Service** > **Service Center Administration**.
   b. Click the **Productivity** card and click the **Create/Manage Workflows** card.
   c. Click **Create**.
   d. Hover your cursor over the play icon and click the **+** icon.
   e. Click **Action Types** and search the custom AI agent action type you created in the previous step. For example, "my_custom_agent_action".

You can use the action type to call the custom AI agent just like you call any built-in AI agent.

Note: For information about Generative AI / Agentic AI realm availability, see *Where are the locations of the OpenAI endpoints for AI agents in Fusion Applications?*