



PUBLIC

Custom Joule Skill & Agent in SAP Build FSM Service Call Assistant Agent

Configuration & User Guide

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This document contains 2 sections. Each section covers different information about this template content package.

1. **Overview:** In this section, you will get quick overview of the use case, what are high-level components used and how the template works in nutshell. Prerequisite section provides information of different services of SAP Business Technology Platform that are required to use this template.
2. **Configuration Guide** It contain sections which will guide you to setup your (a) SAP Business Technology Platform Account with destination, user roles etc., (b) Links and steps to set up Joule studio and Joule (c) Import and configure the template using SAP Build Process Automation - Joule studio

Note:

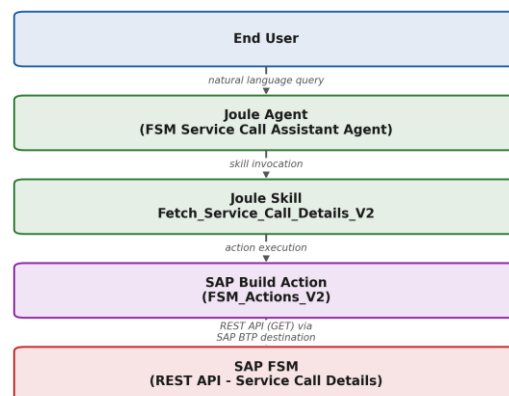
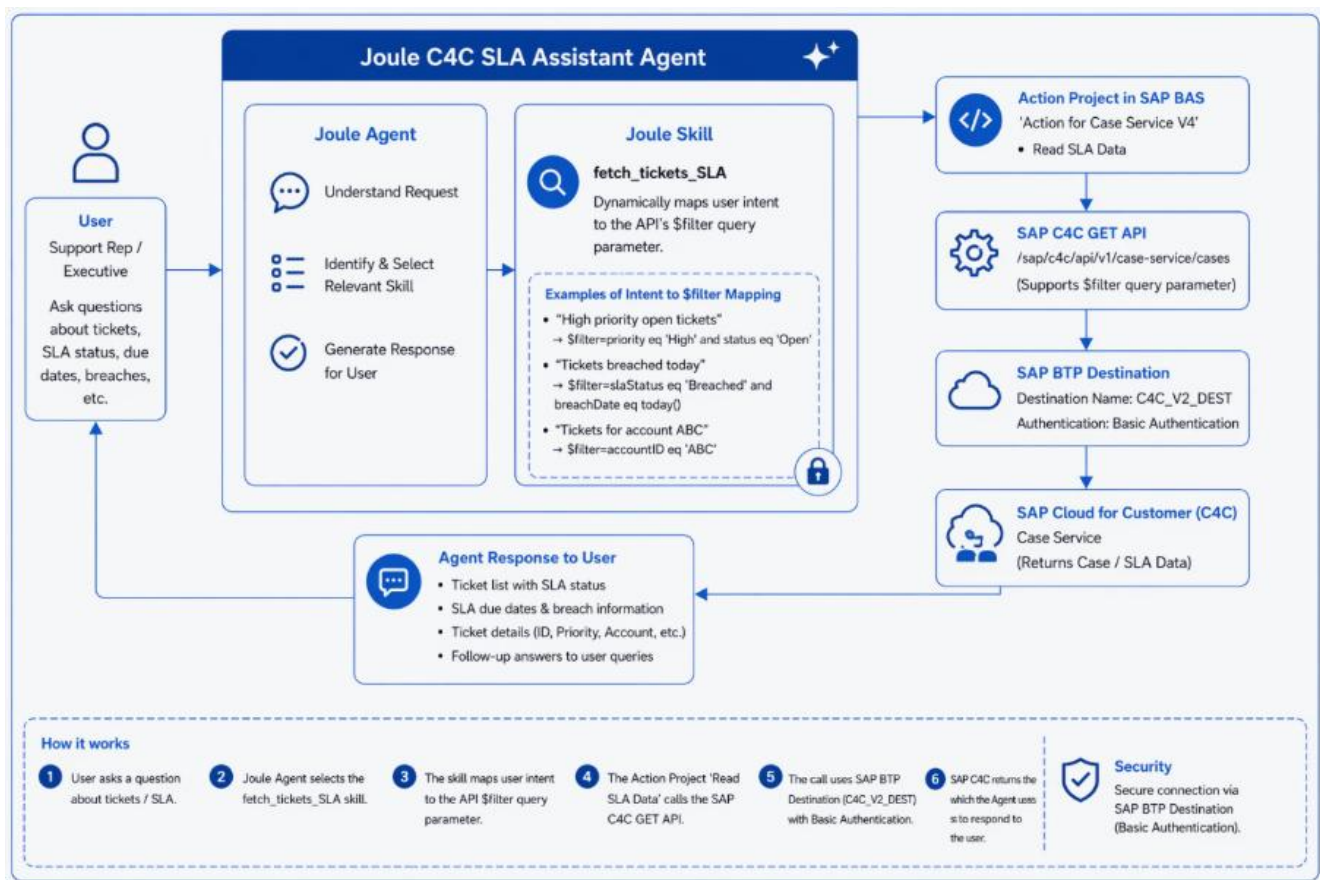
- This agent and documentation are intended for Business use. The content is designed to support real business scenarios and enterprise integrations.
- This documentation does not provide a full end-to-end setup guide for all SAP Business Technology Platform services. It assumes that the IT administrator responsible for setup has prior experience with SAP Business Technology Platform and related services. The configuration steps outlined in this document must be followed as described.
- This content is provided to accelerate enterprise solution implementation. Customers are expected to adapt and extend the agent, skills, and configurations based on their specific business requirements. Users should have a basic understanding of SAP Build Process Automation and its capabilities to effectively customize and operate the solution.

Overview

The FSM Service Call Assistant Agent is a conversational SAP Joule Agent built to help field technicians and service executives quickly access Service Call information from SAP Field Service Management (FSM). Instead of navigating through multiple screens and tabs in the FSM application, users can simply ask the agent, in natural language, to fetch a Service Call and explore its Activities and Reserved Materials.

For example, a technician can ask the agent to fetch a specific Service Call and then follow up with questions such as the status and due date of an Activity, or the arrival date and source warehouse of a Reserved Material. By handling these queries conversationally, the agent helps service teams save time, reduces the manual effort of navigating the FSM UI, and makes it easier to get quick, accurate answers during day-to-day field operations.

Solution flow :



A request begins when the end user asks the agent a question in natural language, such as requesting the details of a specific Service Call.

The Joule Agent interprets the request and identifies the Service Call ID that needs to be looked up, then hands off the request to the appropriate Joule Skill to retrieve the data.

Break the flow into steps:

- a. The Joule Agent selects the Fetch_Service_Call_Details_V2 Joule Skill, which is designed to retrieve the full Service Call object, including its Activities and Reserved Materials.
- b. The Joule Skill invokes an action in the FSM_Actions_V2 project, which performs a REST GET call to SAP FSM through the configured SAP BTP destination. SAP FSM returns the Service Call details, including Activities and Reserved Materials, back to the agent.

The Joule Agent then formats this information into a clear, conversational response and presents it to the user, who can continue asking follow-up questions to drill into specific Activities or Reserved Materials without repeating the initial request.

Business Value & Benefits

The FSM Service Call Assistant Agent delivers the following key benefits to field technicians and service executives:

- Simplifies access to Service Call, Activity, and Reserved Material details through natural conversation
- Reduces the manual effort of navigating multiple screens and tabs in the SAP FSM application
- Saves time for field technicians and executives who need quick answers while on the move
- Increases productivity by allowing users to drill into finer details through simple follow-up questions
- Supports scalability and reuse, since the same Joule Skill can serve multiple conversational scenarios around Service Calls

Together, these benefits enable service teams to spend less time navigating systems and more time resolving customer issues.

Prerequisites

- For this agent to run successfully, the following prerequisites are needed.
- Joule Studio in SAP Build
- Follow the setup guide [here](#) based on your tenant configuration.
- NOTE: If you need additional help with these prerequisites (such as setting up SAP Build Process Automation and SAP Build Work Zone), you can run the Discovery Center mission: [Setup Joule Studio for a BTP Enterprise Account](#).



- SAP Field Service Management (FSM) cloud system accessible from SAP BTP
- SAP FSM Service Management REST API (v2) active and reachable, including the composite-tree/service-calls endpoint
- SAP Build with Joule Studio Enabled
- SAP Business Technology Platform (BTP) account with destination configuration permissions
- OAuth2 Client Credentials (Client ID and Client Secret) provisioned in SAP FSM for API access
- Required user roles/authorizations for Service Calls, Activities, and Reserved Materials in SAP FSM

Configuration Guide

This section describes the configuration steps required to set up the Agent. It includes the necessary configurations in the SAP Business Technology Platform cockpit, destination setup, user role configuration, and details of services and artifacts used by the agent.

The configuration ensures secure connectivity between SAP Build Joule Studio and SAP FSM using an OAuth2-protected REST API, enabling the Joule Agent to retrieve and process Service Call data.

Setup Business Technology Platform Cockpit

Configure SAP FSM Destination

The FSM Service Call Assistant Agent connects to the backend SAP FSM system using the following destination.

Destination Property	Value
Name	FSM_Destination
Type	HTTP
URL	https://eu.fsm.cloud.sap
Proxy Type	Internet
Authentication	OAuth2ClientCredentials
Client ID	<clientId>
Client Secret	<clientSecret>

- Additional Properties :

Parameter	Value
WebIDEUsage	true
sap.build.usage	odata_gen
BuildApps.Enabled	true
BuildApps.ApiType	rest
sap.applicationdevelopment.actions.enabled	true
sap.processautomation.enabled	true
TrustAll	true
authTokenType	Bearer
timeout	60000

NOTE: The Client Secret value is hidden for security and must be maintained directly in the SAP BTP cockpit. Other destination values shown above reflect the FSM_Destination configuration.

Make sure the SAP FSM REST API used by this agent (see the Services Used section below) is reachable by the OAuth2 client configured for the FSM_Destination.

API used: GET /api/service-management/v2/composite-tree/service-calls/{serviceCallId} (SAP FSM Service Management API v2)

SAP Cloud Connector Details

Cloud Connector Required: No

Reason: SAP FSM is a cloud system reachable over the internet, and the destination uses Proxy Type "Internet".

User Roles Configuration

To access and use the FSM Service Call Assistant Agent, the users need to have the roles as described [here](#).

Services used:

There is one Action project used in this agent.

Action Project Name	Service Used	Purpose
FSM_Actions_V2	SAP FSM Service Management REST API - GET /api/service-management/v2/composite-tree/service-calls/{serviceCallId}	Fetches complete Service Call details, including Activities and Reserved Materials, for use by the Joule Skill

Artifacts in the Agent:

Type	Name	Description
Joule Skill	Fetch_Service_Call_Details_V2	Fetches Service Call details, including Activities and Reserved Materials, from SAP FSM
Joule Agent	FSM Service Call Assistant Agent	Conversational SAP Joule Agent that helps field technicians and executives query Service Call, Activity, and Reserved Material details

Setup Content Package

Import Custom Joule Agent

All imported custom agents are available in SAP Build Store. To know more about the SAP Build Store visit [SAP Build Process Automation Store](#).

This template can be downloaded from the SAP Build Store:

1. Navigate to the **Store** option in your SAP Build Lobby.
2. Select the **Project Type** filter as “Joule Agent and Skill”
3. In the Search bar type “**FSM Service Call Assistant Agent**”
4. Select the “Create from Template” button to add the template into your lobby.
5. Once the creation is complete, navigate to the Lobby to find the “**FSM Service Call Assistant Agent**” project is available for use.

Configuration & Modification

Once the Joule Skill & Agent project is added into the lobby, it can be run directly without any modification.

However, if you need to modify Joule skills that are used within the project or you want to modify the agent, with its instructions/additional context or other fields, you can do so.

In order to understand the various capabilities of Joule Studio and work with them please refer to the link: [Create AI Capabilities | SAP Help Portal](#)

Release and Deploy the Project

Once the agent is verified by the user / modified based on user need, it has to be released and deployed into a shared environment.

- Refer to the link below to create/Share an Environment:
[Environments | SAP Help Portal](#)
- Refer to the link below to release a project:
[Release a Project | SAP Help Portal](#)
- Refer to the link below to deploy a project:
[Deploy a Project | SAP Help Portal](#)

Test the Joule Skills And Agent in SAP Build

1. To access your projects, navigate to **Control Tower ->Tenant Configuration->Environments**.
2. Select your environment.

3. After deploying the project, the project should be seen in the Shared Environment.
4. Click on the Tab, '**Joule**'
5. Click on the button '**Launch**'

This will open the Joule launchpad where you can key in the below prompts in order to test the agent.

Prompt	Expected Result
Fetch the details of Service Call 12345	The agent returns the Service Call details, including its Activities (Activity Description, Status, Priority, Due Date) and Reserved Materials (Arrival Date, From/To Warehouse, Material ID).
Show me the Activities for this Service Call	The agent lists the Activities on the previously fetched Service Call, including Activity Description, Status, Priority, and Due Date.
What is the status and due date of the first Activity on this Service Call?	The agent returns the Status and Due Date of the requested Activity from the previously fetched Service Call.
When will the reserved materials arrive, and from which warehouse?	The agent returns the Arrival Date and the From/To Warehouse information for the Reserved Materials on the Service Call.

NOTE:

1: Currently the Agent will be only deployed in the SAP Build environment and hence testing can also be done only in the Build Lobby. If you want to **activate the Joule in other systems** Eg: SAP S/4HANA or SAP Workzone, then click on the **settings** in 'Control Tower->Environments-><Your Shared Environment> ->Joule

Here you must switch the toggle on for '**Share Environment Capabilities**'.

Control Tower / Environments / Build Demos

Edit Share Delete

Last Updated: Author: Members: Identifier: Description:

Projects Triggers Automation Launchers Agent Management Alert Handlers Variables API Keys Visibility Scenarios Processes and Workflows **Joule**

Joule Digital Assistant Shared Launch Refresh Settings

Environment Capabilities Version

Joule Settings

Selecting this option deploys the environment's capabilities to Joule shared assistant, making them available to users who have "Execute" or "Administrator" rights for this environment.

☒ Share Environment Capabilities

Apply Cancel

Support :

If you experience any issues or support related to the FSM Service Call Assistant Agent, Please contact:

SAP_BTP_AI_AUTO@infosys.com