



PUBLIC

Custom Joule Skill & Agent in SAP Build Opportunity Growth 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

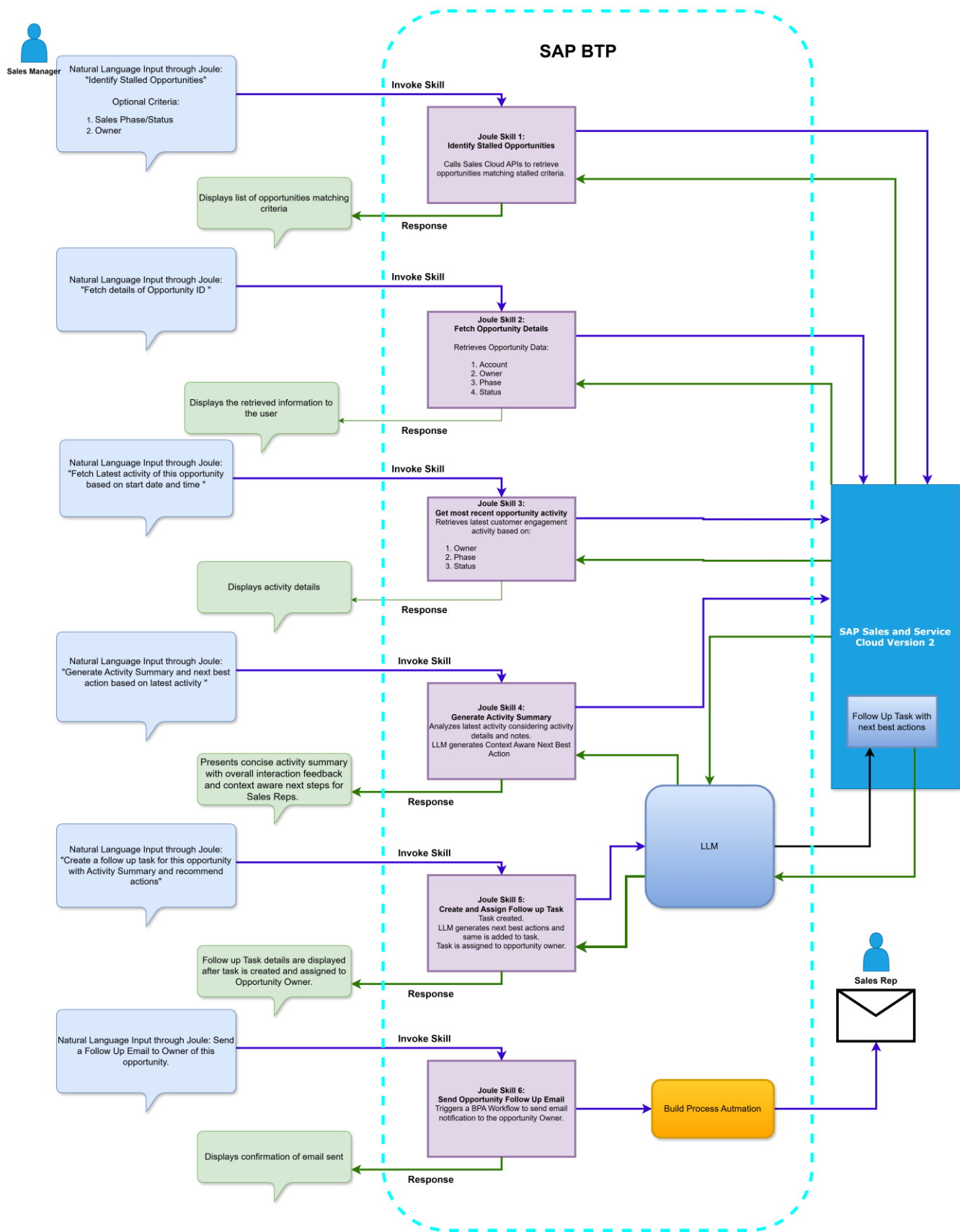
The Opportunity Growth Agent is an AI-powered Joule Agent designed for SAP Sales Cloud V2 to help sales teams proactively identify stalled sales opportunities and improve conversion rates. The agent analyzes opportunity information together with recent customer engagement activities to assess the current state of an opportunity and provide intelligent recommendations for the next best actions.

By leveraging Joule's generative AI capabilities and SAP Sales Cloud business data, the agent



enables sales representatives to focus on high-priority opportunities, automate routine follow-up activities, and make informed decisions that increase the likelihood of closing deals.

Solution flow :



Business Value & Benefits

- Automate identification of stalled sales opportunities.
- Reduces manual effort in monitoring pipeline health.
- Enables timely follow-up with AI-driven recommendations.
- Improve sales productivity and opportunity conversion.
- Provides consistent AI-generated opportunity insights.
- Accelerates customer engagement and response time.
- Supports scalable and reusable sales automation.

Prerequisites

For this agent to run successfully the following prerequisites are needed.

- SAP Build with Joule Studio enabled

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 Sales & Service Cloud V2 tenant
- SAP Sales & Service Cloud V2 REST APIs accessible
- SAP Build Process Automation
- SAP Business Technology Platform (BTP) account
- Destination configured between SAP Build and Sales Cloud
- Required user authorizations for Joule Studio, BPA, and Sales Cloud APIs

Configuration Guide

This section describes the configuration required to enable the Opportunity Growth Agent. The setup establishes secure connectivity between SAP Build Joule Studio, SAP Build Process Automation, and SAP Sales & Service Cloud V2 using Basic Auth REST APIs, allowing the agent to retrieve opportunity information, analyze activities, create follow-up tasks, and send email notifications.

Setup Business Technology Platform Cockpit

Configure SAP Sales Cloud V2 Destination

The Opportunity Growth Agent connects to the backend SAP Sales Cloud V2 system using the following destination.

Destination Property	Value
Name	C4C_V2_DEST
Type	HTTP
URL	https://my1000166.de1.test.crm.cloud.sap/
Proxy Type Internet	Internet
Authentication	Basic Authentication
Username	<Username>
Password	<Password>

- Additional Properties:

Parameter	Value
BuildApps.ApiType	rest
WebIDEUsage	true
sap.applicationdevelopment.actions.enabled	true
sap.processautomation.enabled	true
Sap.build.usage	Odata_gen
BuildApps.Enabled	true

Configure SAP Build Process Automation Destination

The Opportunity Growth Agent connects to BPA API process to send the email to owner using the following destination.

Destination Property	Value
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Name	CX-BPA
Type	HTTP
URL	https://spa-api-gateway-bpi-eu-prod-cfapps-eu10-hana-ondemand.com
Proxy Type Internet	Internet
Authentication	OAuth2ClientCredentials
Client ID	<Username>
Client Secret	<Password>

- Additional Properties :

Parameter	Value
AppgyverEnabled	true
HTML5.DynamicDestination	true
WebIDEEEnabled	true
sap.processautomation.enabled	true

SAP Cloud Connector Details

Cloud Connector Required: No

Reason: The solution connects directly to SAP Sales & Service Cloud V2 through secured REST APIs exposed over the internet.

User Roles Configuration

To access and use the Opportunity Growth 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
Action for Opportunity Service V2	Read Stalled Opportunities	To Read the stalled opportunities
Action for Opportunity Service V2	Read a Specific Data	Read the details of specific Opportunity
Action for Activity Service V2	Appointment Activity	To Read the Opportunity Latest activity detail for Activity summary
Action for Activity Service V2	Phone Call Activity	To Read the Opportunity Latest activity detail for Activity summary
Action for Activity Service V2	Task Activity	To Read the Opportunity Latest activity detail for Activity summary
Action for Activity Service V2	Visit Activity	To Read the Opportunity Latest activity detail for Activity summary
Task Creation in V2	Task Create	To create the follow up task
Email Notification using BPA	Email Notification	To send the follow up email

Artifacts in the Agent:

Type	Name	Description
Joule Skill	List Stalled Opportunities	Retrieves opportunities with no recent activity.
Joule Skill	Get Opportunity Details	Fetches detailed information for a selected opportunity.
Joule Skill	Get Latest Activity	Retrieves the latest customer interaction.

Joule Skill	Generate Activity Summary	Uses AI to summarize the latest activity and recommend next actions.
Joule Skill	Create Follow-up Task	Creates a follow-up task in Sales Cloud.
Joule Skill	Send Email Notification	Triggers BPA to notify the opportunity owner

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 “**OpportunityGrowthAgent**”
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 “**OpportunityGrowthAgent**” 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
Show me stalled opportunities	Returns opportunities without recent customer activity.
Show details for Opportunity	Displays complete opportunity information.
Show the latest activity for Opportunity	Returns the latest customer interaction.
Summarize the latest activity	Generates an AI summary with opportunity risk and recommended next action.
Create a follow-up task	Creates a new follow-up task in Sales Cloud.
Notify the opportunity owner	Sends an email notification through SAP Build Process Automatio

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 Agent Name, Please contact:
SAP_BTP_AI_AUTO@infosys.com