

# Getting Started With **AI Agents**

“Agents are not only going to change how everyone interacts with computers. They’re also going to upend the software industry, bringing about **the biggest revolution in computing since we went from typing commands to tapping on icons.**”

– Bill Gates



# What are agents?

Software that can **autonomously interact with the environment** and **iteratively reason** through multistep tasks to achieve a goal.

## What sets them apart?

### Planning

Agents plan out multiple steps to achieve a goal

### Reflection

Agents self-correct and iteratively reason through problems

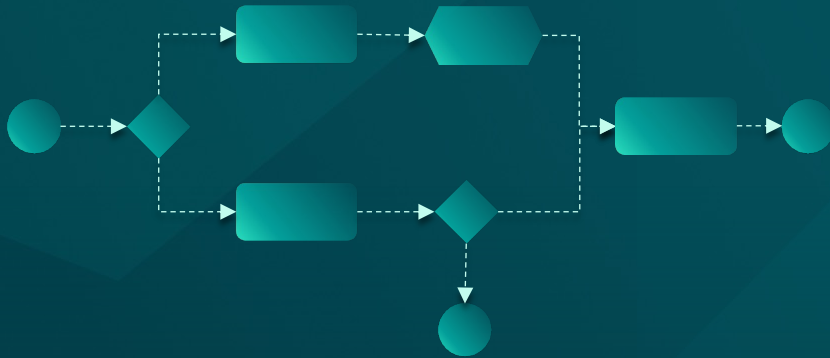
### Tool Usage

Agents gather data and affect changes by using tools like calculators, APIs, and more.

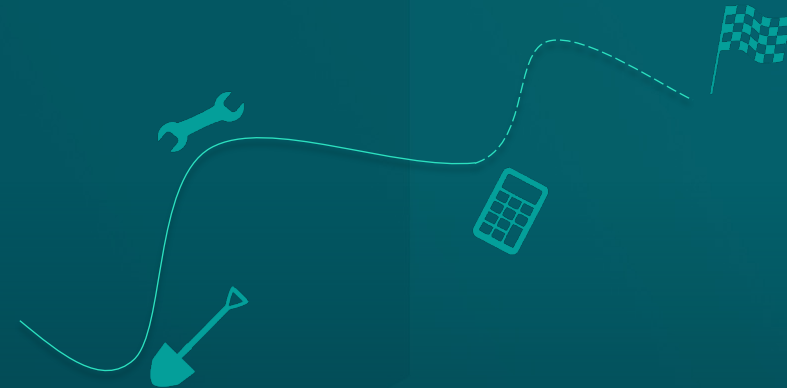
### Collaboration

Agents call other agents and humans to achieve tasks

# Agents are the next evolutionary step towards automation



from modelling **processes with rules** and conditions ....



... to providing tools and a goal for **dynamic problem solving**



# Agents can...



## Sense

Gather data from the environment



## Think / Reason

Create an action plan autonomously and reason to decide next steps.



## Act

Interact with systems and make changes.



## Learn

Adapt based on past experience (data).

## Agents vs. other technologies

How would a robot, a gen ai chatbot and **an agent** help to bake a chocolate cake?



Agent



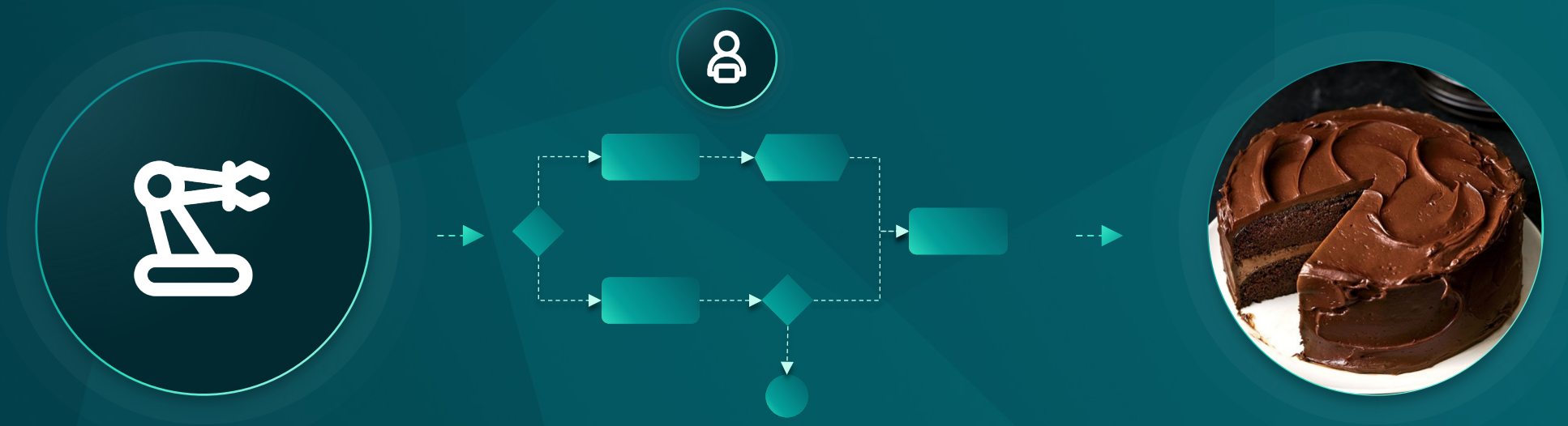
Gen AI



Robot (RPA)

## The Robot

Follows exact steps every time, no thinking needed. Always the same cake.



## The Gen AI Bot

Suggests the best recipe based on ingredients you have, but you bake the cake.



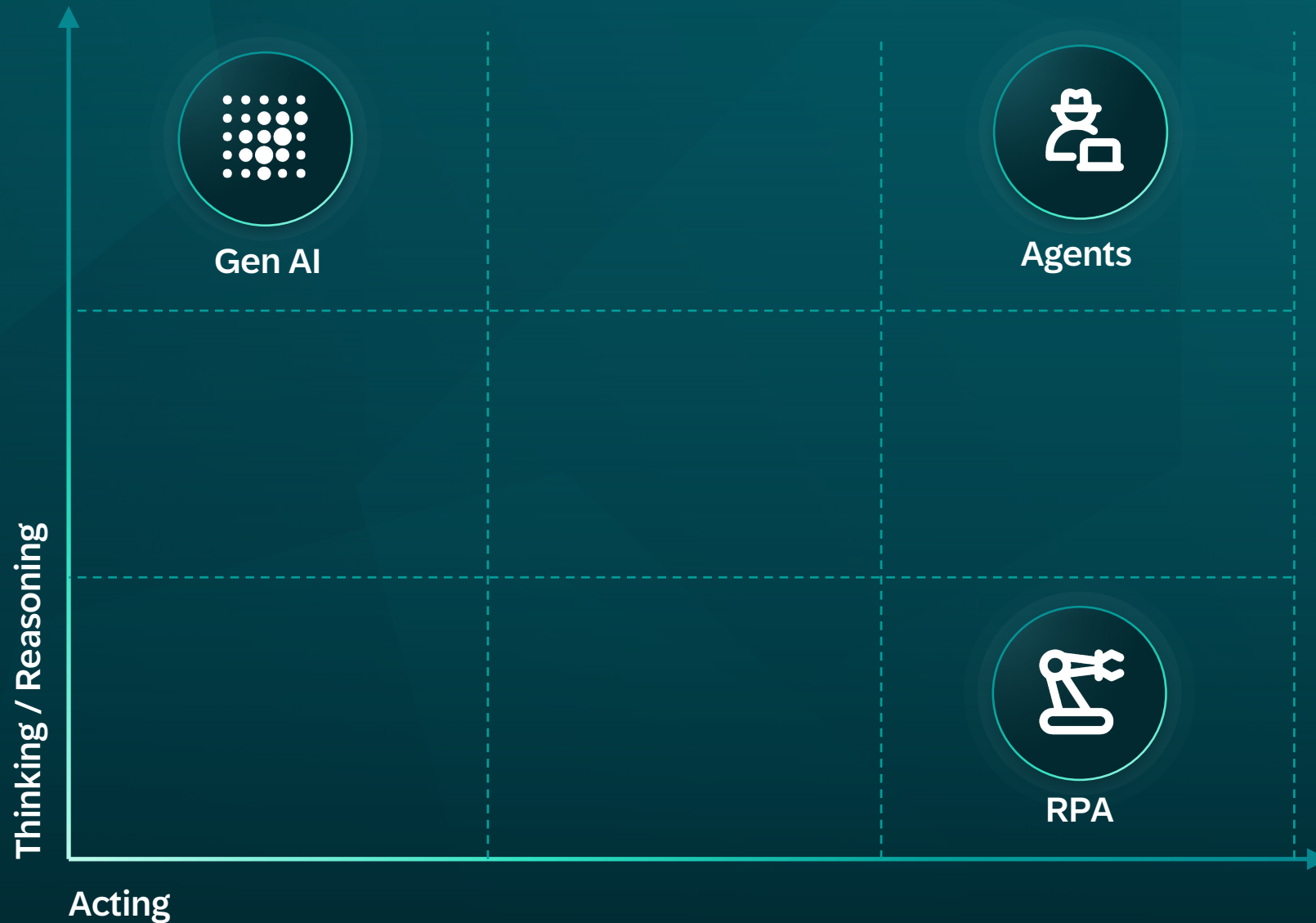
## The Agent

Does everything—gets the ingredients, bakes, adapts, and learns from experience.

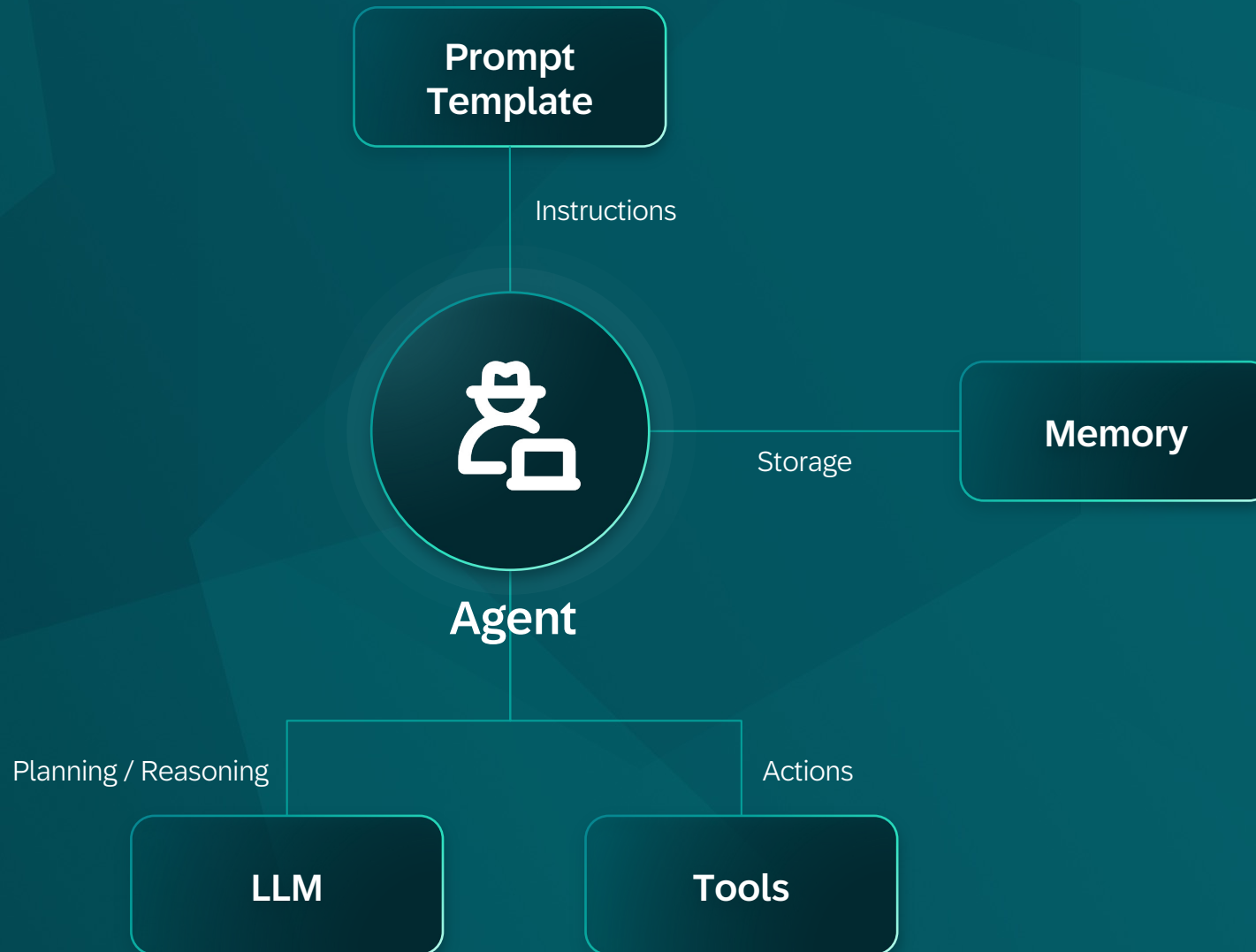




# AI Agents vs. other AI Technologies



# An agent's components





When do we have an agentic use case?

LLM agents thrive in dynamic situations **requiring adaptation, learning, and decision-making.**

Does the activity / process to automate have **multiple steps**?

Are the steps always fixed or do they **change based on context**?

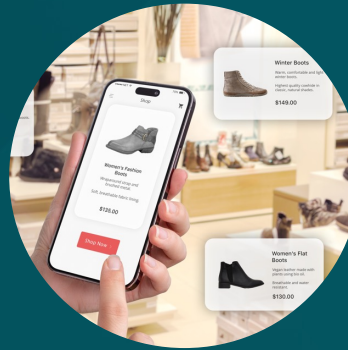
Are the steps decided based on simple rules or do they require **human-like-reasoning**?

# Agentic use case examples



## Customer Support

Handle FAQs, troubleshoot issues and escalate complex inquiries to the appropriate human teams.



## Sales

Qualify leads by engaging potential customers in conversations, gathering information, and automating personalized follow-ups with recommendations.



## Knowledge Base Management

Analyze knowledge bases and service tickets to identify gaps and automatically suggest and draft new articles.

**Sources:** <https://www.atomicwork.com/blog/ai-agent-use-cases>, <https://botpress.com/blog/llm-agents>, [https://sap-my.sharepoint.com/:w/p/sebastian\\_baechle/EViwsCsMNINCpro8ie9TMI0BIZE8a4o3OltYCMXAOz\\_uYw?e=GEXYdJ](https://sap-my.sharepoint.com/:w/p/sebastian_baechle/EViwsCsMNINCpro8ie9TMI0BIZE8a4o3OltYCMXAOz_uYw?e=GEXYdJ)

# How does it work?



Agent

## Decides when to

### Get knowledge / information

(web search, documents)

### Interact with internal and external systems

(DBs, applications, built-in  
calculator, code execution)

### Collaborate with

(Subagents / human)

SAP

Business Agent Foundation

Project Agent Builder

LAB PREVIEW

999+

KD

Home

Agent Explorer

Tools

Documentation

Agents

Create Agent

Agents

Search

Q

↓↑

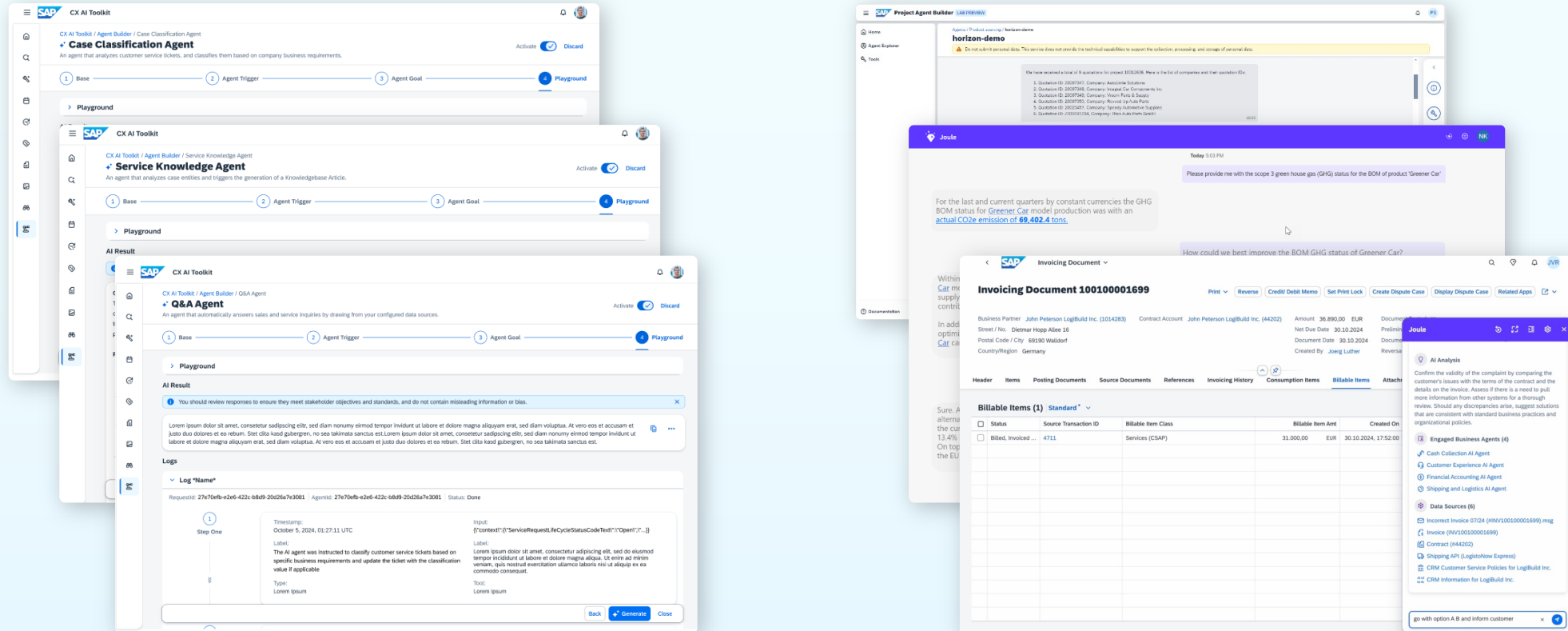
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AI Creative Expert	Convert customer requirements into innovative AI use case ideas	Ready	7 hours ago	Delete
Sampletoday		Ready	2 days ago	Delete
Andritz Presentation		Ready	3 days ago	Delete
Andritz	Wrap Up	Error	3 days ago	Delete
Sesajal	weather	Ready	4 days ago	Delete
LearningDecoder	Testing learning to Summary Main points	Ready	7 days ago	Delete
AI Innovation Consultant	Help customers find use cases for AI	Ready	7 days ago	Delete
ConvergentIS	test	Ready	10 days ago	Delete
Test333		Ready	12 days ago	Delete
Test-CITGO uC		Ready	16 days ago	Delete
Berkant	Evaluate RFP responses from logistics	Error	17 days ago	Delete

LAB PREVIEW



# AI Agents across SAP

## Examples



**Customer Experience:**  
Case Classification, Service Knowledge and Q&A

**Finance:** Dispute Resolution Agent,  
**Sustainability:** Emission factor mapping with AI,  
**Procurement:** Quote Analysis & Scenario Recommendation

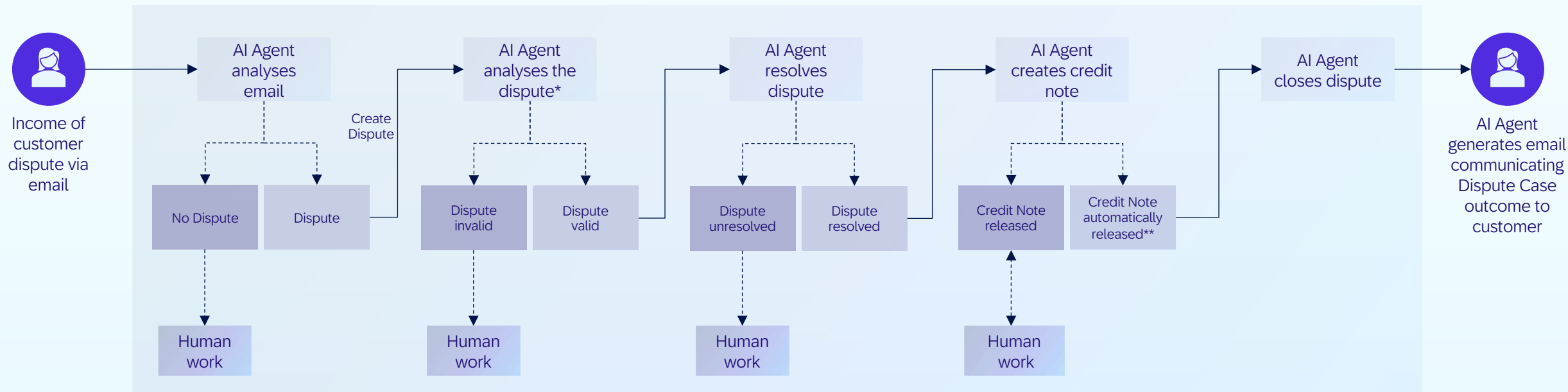


# Dispute Resolution Agent



# Billing Revenue Innovation Management

Vision of End-to-End Dispute Resolution



Each AI step and result must be documented into the notes of the Dispute Case

AI will learn to analyze and solve more and more different kind of Customer Disputes

AI will inform Human Agent to solve the original error to avoid next dispute

\*starts after dispute was created automatically or after human request

\*\*Condition: amount is below max. limit and it's the first customer complaint



# Agents in Action

How the AI Agent resolves the Dispute Case

In development

# Demo

Dispute Resolution



# Sales and Service Agents



# Your current SAP process

From issue to resolution to upsell

## 01 Ticket Classification

Manual categorization  
Basic routing rules

## 02 Research

Research documentation  
Review similar cases

## 03 Resolution

Draft Response  
Optional KB Update

## 04 Sales Handoff

Manual Opportunity  
Repeat customer questions

# Evolution of your process

Automate steps and augment your team's knowledge

## 01 Ticket Classification

Manual categorization  
Basic routing rules

## 02 Research

Research documentation  
Review similar cases

## 03 Resolution

Draft Response  
Optional KB Update

## 04 Sales Handoff

Manual Opportunity  
Repeat customer questions

## 01 Smart Classification

### Classification Agent

Intelligent Categorization  
Basic routing rules

## 02 Solution Finding

### Q&A Agent

Auto-search KB  
Match solutions

## 03 Resolution

### Knowledge Agent

Document solution  
Capture Context

## 04 Sales Intelligence

### Q&A Agent

Answer Product Questions  
Provide upgrade details



# Agents in Action

Building a Case Classification Agent

Released 01/25

# Demo

Streamlining Customer Service

# Case Classification Agent

Route tickets to the right teams

## Agent Purpose

### Goal

— Categorize and prioritize new tickets without historical data

### Prompt

— Examine case details, apply business rules to determine category and priority, update fields accordingly

### Tools

— Get case record, prioritize case, update field

The screenshot displays the SAP CX AI Toolkit interface for configuring the Case Classification Agent. The top navigation bar includes the SAP logo and the title 'CX AI Toolkit'. Below this, the breadcrumb path is 'CX AI Toolkit / AI Agent Builder / Case Classification Agent'. The main heading is 'Case Classification Agent', with a subtitle 'Subtitle or page description can go here.' and an 'Activate' toggle switch.

A progress bar at the top indicates four steps: 1. Agent Setup, 2. Agent Trigger, 3. Agent Goal (currently active), and 4. Playground.

The 'Agent Goal' section contains an 'Instructions' field with the following text: 'You are an agent that handles customer service tickets. Your job is to classify the tickets using company specific business requirements. Do not make up your own classification rules or guidelines. Once a classification value has been identified, update the ticket with that classification value. If a ticket is unable to be classified, do not perform any updates.'

The 'Agent Tools' section lists two tools: 'Filter Records' and 'Case Classification'. The 'Case Classification' tool is expanded, showing its 'Instructions' field with a list of rules: 1. Answer 'Taxes' is to be set when there is mention of tax-related questions. 2. Answer 'Technical' is to be set if there are technical questions about cars, operations, or car specifications. 3. Answer 'Finance' should be set if it is a question regarding financing, loans, payments, or lease details. 4. Answer 'Legal' should be set if a customer threatens a lawsuit. 5. Answer 'Standard' if none of the previous rules apply.

At the bottom of the 'Case Classification' tool, there is an 'Update Field' button. The bottom of the interface features a 'Back' button, a 'Save' button, and a 'Clear' button.



# Q&A Agent

Get proactive resolutions to issues

## Agent Purpose

### Goal

— Answer product-related questions in service cases.  
E.g. How to fix error E-5501 for CloudConnect X3

### Prompt

— Identify product questions in new cases, search product documentation, suggest answers for email responses

### Tools

— Get opportunity record, find questions, find answers, update field

The screenshot displays the SAP CX AI Toolkit interface for configuring a Q&A Agent. The top navigation bar includes the SAP logo, 'CX AI Toolkit', and an 'Activate' toggle. The breadcrumb trail shows 'CX AI Toolkit / AI Agent Builder / Q&A Agent'. The main content area features a progress bar with four steps: 1. Agent Setup, 2. Agent Trigger (currently active), 3. Agent Goal, and 4. Playground. Below the progress bar, the 'Agent Trigger' section contains a 'Source Application' dropdown set to 'Service V2' and an 'Entity' dropdown set to 'Opportunities'. The 'Trigger Operations' section is expanded, showing 'Opportunities' with 'Operate' options: 'On Create' (unchecked) and 'On Update' (unchecked). At the bottom right, there are 'Back', 'Next', and 'Clear' buttons.

# Knowledge Agent

Document case success and insights

Released 01/25

## Agent Purpose

### Goal

— Generate knowledge articles from closed cases

### Prompt

— Analyze closed case, extract key info, create structured article summarizing issue and solution

### Tools

— Filter records, update field, generate knowledge article:  
E.g. troubleshooting Washing Machine Flashing Lights Issue,  
Water Build Up Inside of Refrigerator, Refrigerator is Leaking Water

The screenshot displays the SAP CX AI Toolkit interface for configuring a 'Service Knowledge Agent'. The top navigation bar includes the SAP logo and the text 'CX AI Toolkit'. Below this, the breadcrumb trail reads 'CX AI Toolkit / AI Agent Builder / Service Knowledge Agent'. The main heading is 'Service Knowledge Agent' with a subtitle 'Subtitle or page description can go here.' and an 'Activate' toggle switch. A progress bar at the top indicates four steps: 1. Agent Setup, 2. Agent Trigger, 3. Agent Goal (currently active), and 4. Playground. The 'Agent Goal' section contains an 'Instructions' box with the following text: 'You are an agent that will analyze a case entity provided in the conversation history. Using tools you will trigger a knowledgebase article generation and update the case with the generated article back to the C4C system. When you receive a request, you must only use the provided tools to generate a knowledgebase article, you cannot make one up. Before suggesting a tool call, ensure that you have all of the necessary information to call the tool. Do not make up default values for the tool call inputs. Only after ensuring all values have the correct inputs, suggest the tool call. You can only use input values extrapolated from the conversation history.' Below the instructions is the 'Agent Tools' section, which lists three tools: 'Filter Records', 'Generate Knowledge Article', and 'Update Field', each with a right-pointing arrow. At the bottom right of the interface are three buttons: 'Back', 'Save', and 'Clear'.



“

Integrating the AI-powered Case Classification Agent in our SAP Service Cloud has been a game-changer for fast customer ticket resolution.  
Replacing hundreds of routing workflows with a single prompt has significantly

**improved accuracy, reduced manual effort,  
and accelerated resolution times**

— boosting efficiency while enhancing response quality.  
This transformation not only saves us thousands of work hours a year but also optimizes costs and improves customer satisfaction.  
A true leap forward in intelligent service management!

**Florian Haustein**  
Business Digital Organization - Digital Customer Experience  
Robert Bosch Power Tools