

22.4 Agents

The **Agents** section allows you to configure AI agents that combine an **LLM model**, one or more **MCP tools**, and, if required, CRM documents to use as a knowledge base. In practice, this is where you define how the agent reasons, which tools it can use, and which content it can access to perform a task.

In summary: an **agent** is not just an AI model. It is a complete configuration that combines an **LLM**, **operational tools**, and **document sources**, allowing it to perform tasks in a more controlled and context-aware way within vtenext.

Prerequisite: Agent Orchestrator

To use agents, the [Agent Orchestrator](#) service must be installed and reachable. In the **Agents** list view, there is a dedicated section where you can specify the **Orchestrator Endpoint**, which is the base URL of the service.

Agents orchestrator

The vtenext agents orchestrator coordinates agents and executes automated tasks. Install it following the manual.

[Open the installation manual](#)

Orchestrator endpoint

Update

Base URL of the orchestrator service (e.g. [http://127.0.0.1:8120](#)).

Important: if the orchestrator endpoint is not configured correctly, agents cannot be executed.

When to use it

- To configure AI agents to be used in the assistant or within processes.
- To associate a specific LLM with an agent.
- To provide the agent with access to selected MCP tools.
- To enable **RAG** capabilities by selecting CRM documents as knowledge sources.
- To apply control rules before and after response generation (**guardrails**).

The List View

The list displays all previously configured agents.

Agents

ACTIVE	NAME	DESCRIPTION	TYPE	LLM	LBL_AI_AGENT_RAG_DOCUMENTS_TITLE	TOOLS
✓	agente1		Agent	gpt-oss:120b	✗	

Agents orchestrator

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[Open the installation manual](#)

Orchestrator endpoint

Update

Base URL of the orchestrator service (e.g. http://127.0.0.1:8120).

- **Active:** indicates whether the agent is enabled.
- **Name:** name of the agent.
- **Description:** text explaining the purpose of the agent.
- **LLM:** shows the associated model.
- **Documents:** indicates whether the agent has access to RAG documents.

From the list, you can create a new agent, edit it, or delete it.

Creating a New Agent

vtnext

AI Tools

LLM

MCP Client

MCP Server

Agents

Assistant

Business Process Manager

Process manager

REST Webservices

Mail Converter

Synchronizations

Status fields permissions

Condition based fields

Wizard creator

Module creator

Module settings

Picklist editor

Internationalized picklist

Linked picklist

Encrypted fields

Top menu settings

Listview colors

Search...

IC Collapse

Search...

Settings > Agents

Configure AI agents to use in your assistant and processes

Configure Agent

Configure agents that use LLMs, MCP tools and RAG to complete tasks automatically.

Active

☒

Name

Description

LLM

--Please select--

Static pre-guardrail

Pre-guardrail LLM

--Please select--

Post-guardrail LLM

--Please select--

Static post-guardrail

Save

Cancel

Define strings and regular expressions to block inputs that contain prohibited words. Use a new line to enter multiple values.
examples:
pwd
/password/i
/passphrase/i

Select an LLM to evaluate the input. It may affect token consumption and request latency.

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Tools

Search...

Select all

Kitt tools

calculator

Calculate simple math expressions.

user_manual

Search the vtnext user manual.

Default VTE MCP Client

Select all

convert_lead

Starts the process for lead conversion

create

Create a record of the specified module. To understand the fields of the specified module, you should us...

delete

Delete the specified record

describe

Describe the specified module and their relative fields; you must run this tool before attempting any task, to...

get_current_context

Fetches general context information relevant for use with other MCP tools (so it does not need any parameters...

listtypes

List the modules that have fields with 'utype' of the specified formats

process_text

Rewrite or improve the supplied text using an optional tone of voice and complexity level.

query

Safely execute a SQL-like query and return the result's rows. Additional notes: - The 'FROM' clause accepts...

relate

Relate the record with all the records in a relatelist array

retrieve

Illustrate the fields of the specified record and their relative values

retrieveinventory

Illustrate the fields of the specified inventory record, their relative values and the product block's information

summarize

Generate a summary of a VTENEXT record. Use this tool whenever the user asks for a summary, recap,...

tools_manual

Fetches additional information relevant for use with other MCP tools; this is especially needed for tools th...

touch.get_currencies

Retrieves the list of active or all configured currencies in the system.

translate

Translate a Messages email thread into the language of the user interacting with the assistant. Use th...

updateRecord

Update the specified record with new information

Web Search MCP - Exa

Select all

web_fetch_exa

Read a webpage's full content as clean markdown. Use after web_search_exa when highlights ar...

web_search_exa

Search the web for any topic and get clean, ready-to-use content. Best for: Finding current information, news,...

(0)

Enable Retrieval-Augmented Generation by selecting CRM documents as knowledge sources. Only file-type documents are supported.

Select

ACTION	TITLE	FILE NAME	ASSIGNED TO	FOLDER
	Title	File Name	Assigned To	Folder

No documents selected.

1. Open the **Agents** section.
2. Click **Add**.
3. Enable or disable the agent according to your needs.
4. Enter the **Name** and **Description**.

5. Select the **LLM** to use.
6. Decide whether to keep the LLM system prompt or override it for this specific agent.
7. Select the tools the agent will be able to use.
8. If necessary, enable the **RAG** capability and select the documents.
9. Configure any **guardrails**.
10. Save the configuration.

Main Fields

Active	☒
Name	
Description	
LLM	--Please select--
Static pre-guardrail	 Define strings and regular expressions to block inputs that contain prohibited words. Use a new line to enter multiple values. examples: pwd /password/i /passphrase/i
Pre-guardrail LLM	--Please select-- Select an LLM to evaluate the input. It may affect token consumption and request latency.
Post-guardrail LLM	--Please select-- Select an LLM to evaluate the output. It may affect token consumption and request latency.
Static post-guardrail	 Define strings and regular expressions to block outputs that contain prohibited words. Use a new line to enter multiple values.

- **Active:** enables or disables the agent.
- **Name:** internal name used to identify the agent.
- **Description:** brief internal description summarizing the agent's purpose.
- **LLM:** language model used by the agent.
- **LLM System Prompt:** displays the system prompt currently configured for the selected model.
- **Override System Prompt:** when enabled, the agent uses a specific system prompt instead of the LLM's default one.
- **System Prompt:** agent-specific instructions, visible only when choosing to override the model's prompt.

When to use system prompt override: it is useful when you want to keep the same LLM but significantly change the behavior, tone, or responsibilities of a specific agent.

Available Tools for the Agent

Below the main fields, you will find the **Tools** section, where you can choose which tools the agent is allowed to use.

Tools

Search...

Select all

Kitt tools

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Calculate simple math expressions.

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(0)

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Select

ACTION	TITLE	FILE NAME	ASSIGNED TO	FOLDER
	Title	File Name	Assigned To	Folder

No documents selected.

The tools are displayed by groups, based on the active MCP clients and the available internal tools.

- **Kitt Tools:** includes basic internal tools such as **calculator** and **user_manual**.
- **MCP Clients:** for each active MCP client, you can select the synchronized and available tools.

For each group, you can select all tools or quickly deselect them. A search function is also available to filter tools by name or description.

Warning: the agent can only use the tools selected in this section. If an MCP client is not configured or has no synchronized tools, it will not appear as an available source.

RAG Capability and Documents

If you want the agent to also work with CRM content, you can enable the **RAG capability**.

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Only file-type documents are supported.

Select

ACTION	TITLE	FILE NAME	ASSIGNED TO	FOLDER
	Title	File Name	Assigned To	Folder

No documents selected.

- **RAG Capability:** enables the use of documents as knowledge sources.
- **Select:** opens the document selector to add CRM files.
- **Document Table:** displays the title, file, owner, and document folder of the documents already associated.

Once added, documents remain linked to the agent and can be removed at any time from the table.

When to use RAG: it is useful when the agent needs to answer questions or perform tasks based on documentation, files, or company content stored in the CRM, rather than relying only on generic instructions.

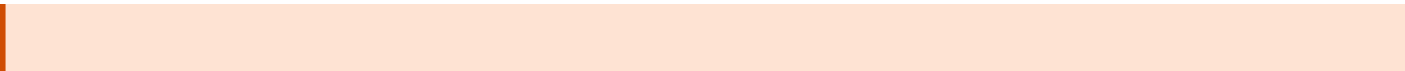
Guardrail

The **Agents** section also allows you to define checks before and after response generation.

Static pre-guardrail		Define strings and regular expressions to block inputs that contain prohibited words. Use a new line to enter multiple values. examples: pwd /password/i /passphrase/i
Pre-guardrail LLM	--Please select--	Select an LLM to evaluate the input. It may affect token consumption and request latency.
Post-guardrail LLM	--Please select--	Select an LLM to evaluate the output. It may affect token consumption and request latency.
Static post-guardrail		Define strings and regular expressions to block outputs that contain prohibited words. Use a new line to enter multiple values.

- **Static Pre-Guardrail:** blocks inputs containing prohibited words or expressions.
- **LLM Pre-Guardrail:** uses an LLM to evaluate the input before processing.
- **Pre-Guardrail Prompt:** defines the instructions used by the control mechanism to evaluate the input.
- **Static Post-Guardrail:** blocks outputs containing prohibited content.
- **LLM Post-Guardrail:** uses an LLM to evaluate the response before returning it.
- **Post-Guardrail Prompt:** defines the instructions for the final validation step.

Static rules can include plain text or regular expressions, one per line.



Warning: LLM-based guardrails can increase token consumption and response times, as they add additional verification steps.

Practical examples

Example 1: Agent with operational tools

You can create an agent that uses an LLM and selected MCP tools to query data, perform permitted actions, or access external services such as web search.

Example 2: Document-based agent

You can create an agent focused on internal documents by enabling RAG and selecting only the files relevant to a specific department or process.

Example 3: Agent with enhanced controls

If the agent operates on sensitive content, you can apply pre-guardrails and post-guardrails to restrict inappropriate requests or responses.

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