BeanTrail Agentforce – Installation & Configuration Guide

This guide explains, in simple and detailed steps, how to install the BeanTrail package, enable Agentforce, create the Field Tracking Topic, and understand how the tracking enable/disable flow works.

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1. Install the BeanTrail Package

Follow these steps to install the BeanTrail managed package in your Salesforce org.

Step 1: Open the Installation URL

Click or paste the following link into your browser:

https://login.salesforce.com/packaging/installPackage.apexp?p0=04tf60000008GxF

Step 2: Choose the Installation Level

You will see three options:

- **Install for Admins Only** (recommended during testing)
- Install for All Users
- Install for Specific Profiles

Select **Install for Admins Only**, then click **Install**.

Step 3: Approve Third-Party Access

If prompted, check the box for *"Yes, grant access"* and continue.

Step 4: Wait for Installation Completion

Salesforce may take a few minutes to finish installing.
You will receive a success message once the package is installed.

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2. Enable Agentforce in the Salesforce Org

Agentforce must be enabled org-wide before creating any AI agents.

Step 1: Navigate to Setup

1. Click the **Gear Icon** (top right).
2. Click **Setup**.

Step 2: Search for “Generative AI Settings”

1. In the left search bar, type **Generative AI**.
2. Click **Generative AI Settings**.

Step 3: Enable Org-Wide Generative AI

You will see a toggle or checkbox such as:

- **Enable Agentforce**
- **Enable Generative AI Features**

Turn the toggle **ON**.

Step 4: Accept Salesforce Terms

If prompted, review and accept Salesforce’s generative AI terms.

Now Agentforce is active for the entire org.

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3. Create or Open an Agentforce Agent

Step 1: Open Agentforce Setup

1. Go to Setup.
2. In Quick Find, type **Agentforce**.
3. Click **Agentforce**.

Step 2: Use "Agentforce Default Agent" OR Create Your Own

You have two choices:

- Click **Agentforce Default Agent** (recommended), OR
- Click **New Agent** and follow the simple on-screen instructions.

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4. Create the BeanTrail Field Tracking Topic

This topic will allow the agent to enable or disable field tracking inside the BeanTrail app.

Step 1: Add a New Topic

Inside the Agent page:

1. Scroll to **Topics**.
2. Click **New Topic**.

Step 2: Fill Topic Details

You may name the topic anything (e.g., **BeanTrail – Field Tracking**).

Classification Description:

Enables/disables field tracking for a specified object and field, with optional criticality.

Scope:

Your job is only to enable or disable and manage the tracking of fields within the BeanTrail App. Use the apex actions to carry out further commands.

Instructions (copy exactly):

Also include the object name and field name if explicitly stated.

Do not mention the Ultra Track Container. Only mention whether tracking is enabled, disabled or the criticality is set or not.

Do not offer to enable tracking for the object if tracking container is not found. Simply notify the user to enable tracking for the object.

You are a Salesforce Admin Assistant. When a user asks you to enable or disable field tracking on a field, use the Apex action `EnableFieldTrackingAction.processTrackingCommand`.

The command will be provided in plain English like:
- "Enable tracking on the Amount field in Opportunity"
- "Disable critical tracking on Billing City field in Account"
- "Enable critically track Stage field in Opportunity"

Use the command variable to pass the full natural language command.

If tracking container for an object is not found, ask the user to enable tracking for the object before tracking fields for the object.

Step 3: Add the Agent Action

At the bottom of the Topic window:

1. Click **Add Action**.
2. Select: **Agentforce: Process Field Tracking Command**.
3. Save the Topic.

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5. Activate and Test the Agent

Step 1: Activate the Agent

Click **Activate** at the top of the Agent page.

Step 2: Test via the Chat Window

Examples you can try:

- *"Enable tracking on Billing City field in Account"*
- *"Disable critical tracking for Stage in Opportunity"*
- *"Enable tracking on Amount field in Opportunity"*

If the object's tracking container is missing, the agent will notify:

"Tracking for this object is not enabled. Please enable tracking for the object first."