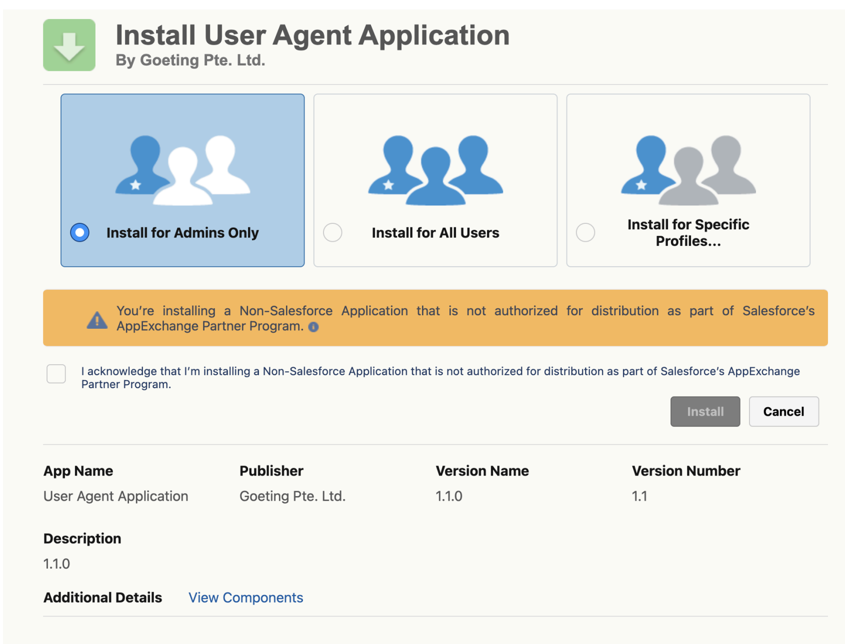
User Agent Application - Installation

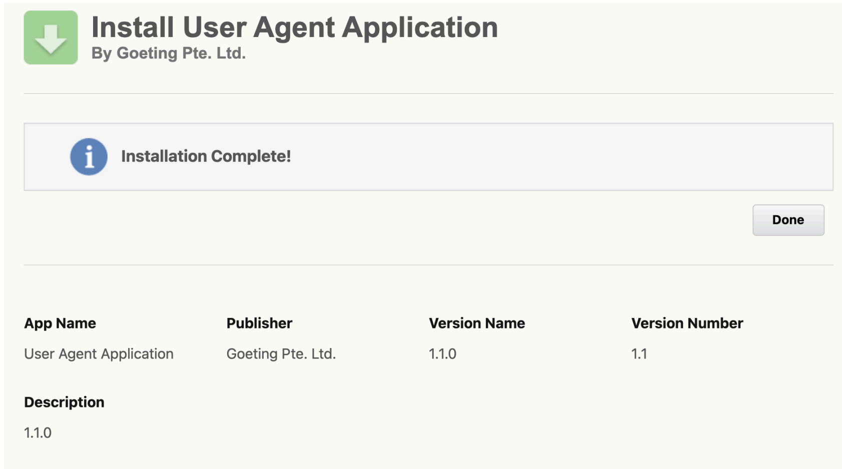
This document explains how to install and configure the User Agent application and should take around 30 minutes to complete.

Step 1: Installation

Ensure that you are logged in as a user who has the System Administrator profile in your environment. Now open the url to the User Agent application version 1.1.0 managed package [here](). The following window should appear. Depending on your organization you could install the User Agent Application for only your administrators or also other specific profiles. We do not recommend that you install this application for all users, the application will still do the correct security checks to see if users have the correct rights to make user related changes however this application is mainly catered towards people in your organization who have to manage users. Click on the **install** button.

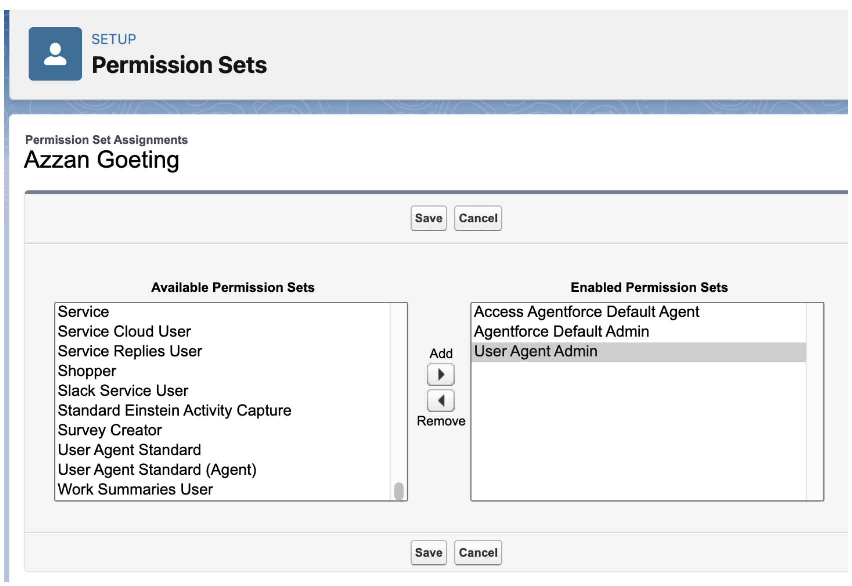


When the installation has been done you should see the following confirmation window. Click on the **done** button, a trial version of the User Agent application is now installed.



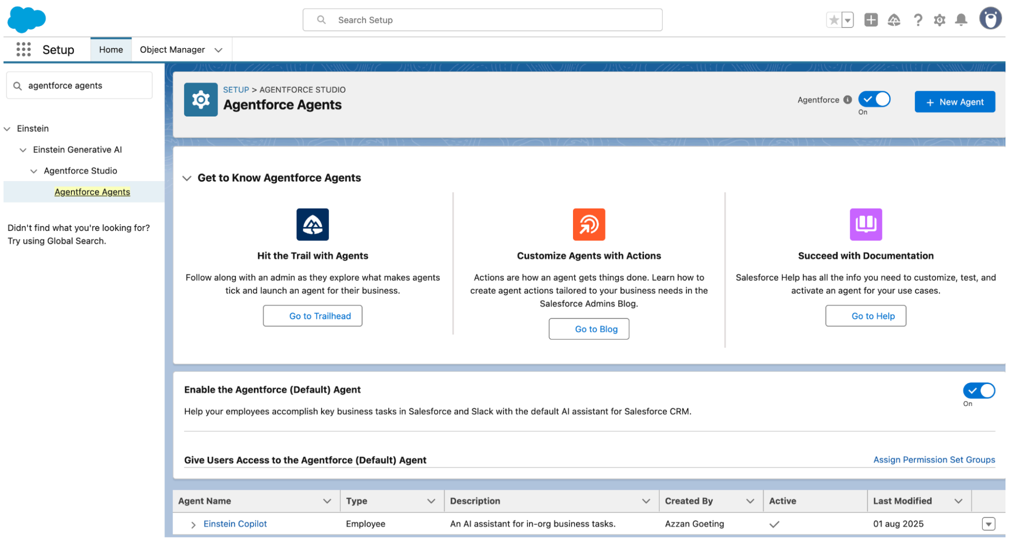
Step 2: Permission Set Assignment

Go to any of the users who will be using the application and assign the **User Agent Admin** permission set. The **User Agent Standard** permission set has the same permissions but does not have access to the visualforce pages used for the undo and redo processes.

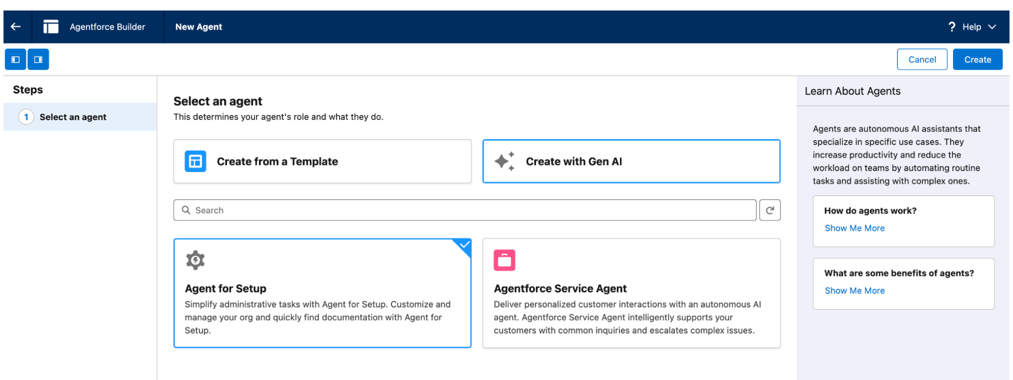


Step 3: Create Setup Agent

Go to the setup and in the quick find search bar search for agentforce agents. You should see a window similar to the one here under. Click on the **New Agent** button



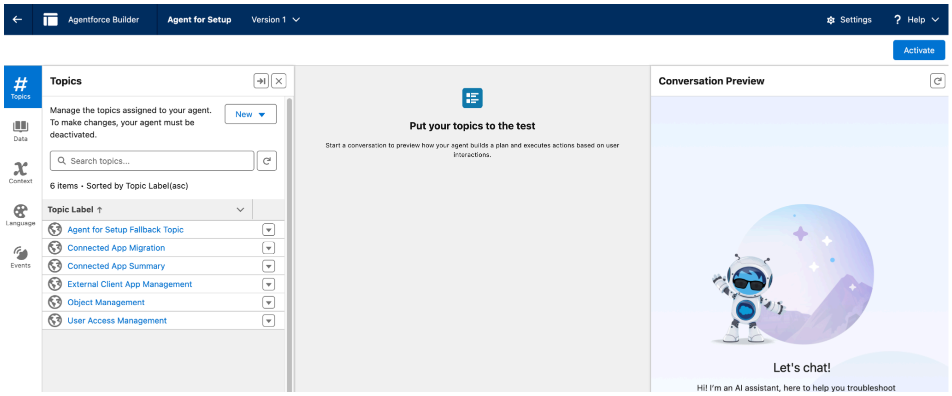
Select **Agent for Setup** and click on the **create** button.



You are now forwarded to the page where you can create new topics. See the next step.

Step 4: Create Topics

You should have arrived on the following screen here under.

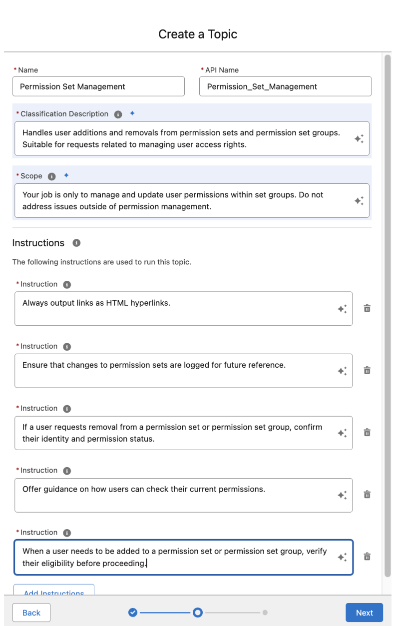


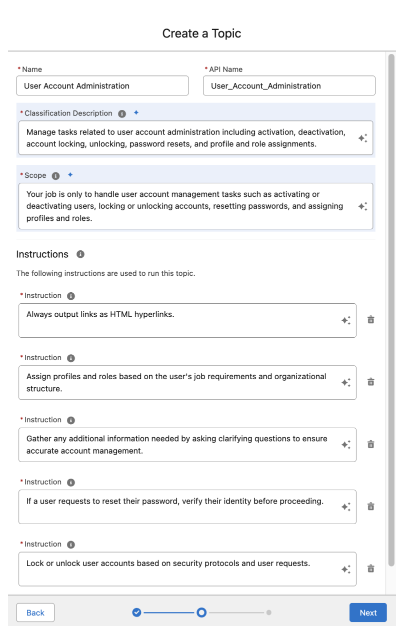
Now click on the **new** button and select a **new topic**. You will have to create three different topics please use the table here under to create those. Please use the table here. By answering the '**What do you want this topic to do?**' question you will see the fields in the next screen automatically getting filled out, you can leave the pre-filled **Name, API Name, Classification Description** and **Scope** fields filled in with the generated information but please replace the **Instructions** with the ones shown in the table here under.

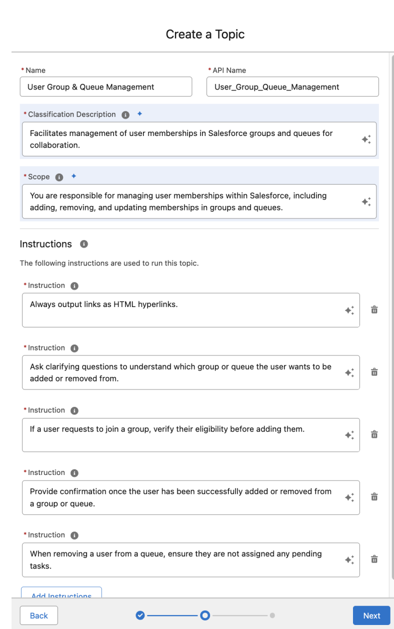
Topic	**What do you want this topic to do?**	**Instructions**
Permission Set Management	Manage user additions and removals from permission sets and permission set groups.	● Always output links as HTML hyperlinks. ● Ensure that changes to permission sets are logged for future reference. ● If a user requests removal from a permission set or permission set group, confirm their identity and permission status. ● Offer guidance on how users can check their current permissions. ● When a user needs to be added to a permission set or permission set group, verify their eligibility before proceeding.
User Account Administration	Handles tasks related to user account administration such as	● Always output links as HTML hyperlinks. ● Assign profiles and roles based on the user's job requirements and organizational structure. ● Gather any additional information needed

	activating/deactivating users, locking/unlocking accounts, resetting passwords, and assigning profiles and roles.	by asking clarifying questions to ensure accurate account management. • If a user requests to reset their password, verify their identity before proceeding. • Lock or unlock user accounts based on security protocols and user requests. • When activating or deactivating a user account, ensure all necessary permissions are updated accordingly.
Group & Queue Management	Facilitates the management of user memberships in Salesforce groups and queues for collaboration.	• Always output links as HTML hyperlinks. • Ask clarifying questions to understand which group or queue the user wants to be added or removed from. • If a user requests to join a group, verify their eligibility before adding them. • Provide confirmation once the user has been successfully added or removed from a group or queue. • When removing a user from a queue, ensure they are not assigned any pending tasks.

When you have changed the instructions, click on the **next** button and skip selecting any agent actions in the next window, you can just proceed to click on the **finish** button directly and move on to creating the next topic.

<table>
<tr><th>Permission Set Management</th><th>User Account Administration</th><th>Group & Queue Management</th></tr>
<tr><td>


</td><td>


</td><td>


</td></tr>
</table>

Step 5: Create Topic Actions

Now that the three topics have been created we will need to create **7** topic actions under the **Permission Set Management** topic, **10** topic actions under the **User Account Administration** topic, and finally **7** topic actions under the **Group & Queue Management** topic. Please use the tables here under for reference.

Important!

All the topic actions that need to find information need to have their output set to **object** and all the topic actions that assign or do bulk changes need to have their output set to **rich text**.

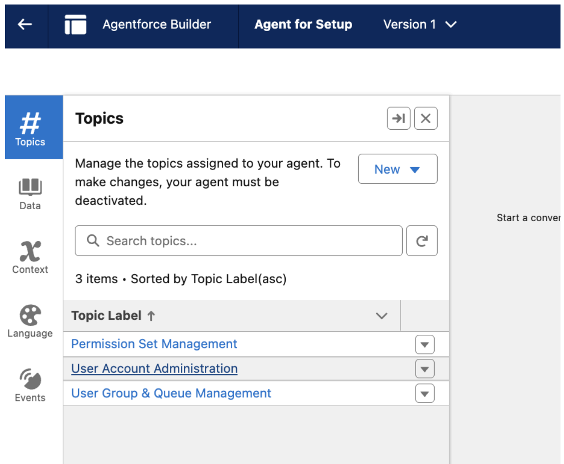
Topic actions for Permission Set Management
• Find Users By Criteria • Find Permission Sets By Names • Find Permission Set Groups By Names • Bulk Add Multiple Users To Multiple Permission Sets • Bulk Remove Multiple Users From Multiple Permission Sets • Bulk Add Multiple Users To Multiple Permission Set Groups • Bulk Remove Multiple Users From Multiple Permission Set Groups

Topic actions for User Account Administration
• Find Users By Criteria • Find Single Profile By Name • Find Single User Role By Name • Bulk Activate Multiple Users • Bulk Deactivate Multiple Users • Bulk Lock Multiple User Accounts • Bulk Unlock Multiple User Accounts • Bulk Reset Passwords For Multiple Users • Assign Single Profile To Multiple Users • Assign Single User Role To Multiple Users

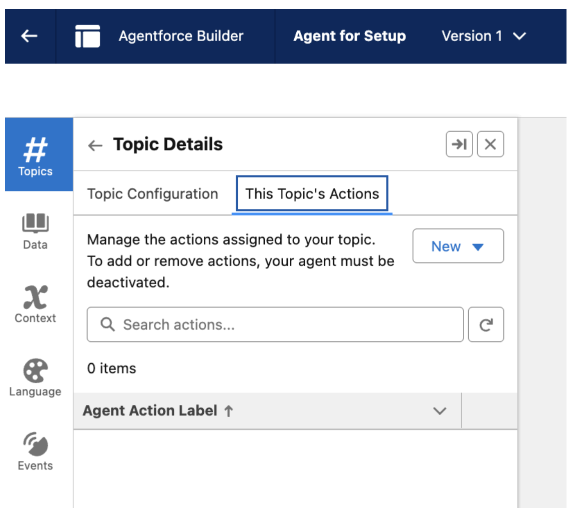
Topic actions for Group & Queue Management
• Find Users By Criteria • Find Groups By Names • Find Queues By Names • Bulk Add Multiple Users To Multiple Groups • Bulk Remove Multiple Users From Multiple Groups • Bulk Add Multiple Users To Multiple Queues

- Bulk Remove Multiple Users From Multiple Queues

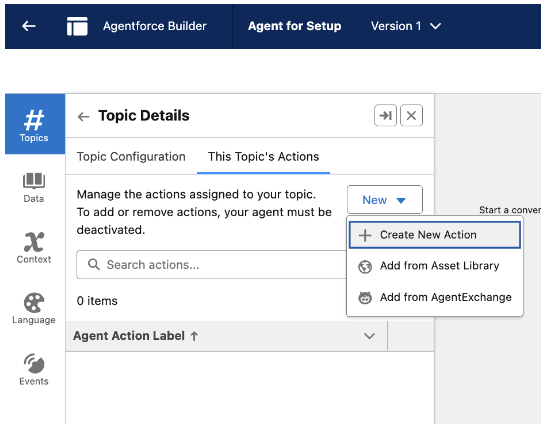
Let's first build out the User Account Administration topic. Click on the **User Account Administration** topic in the Agentforce Builder.



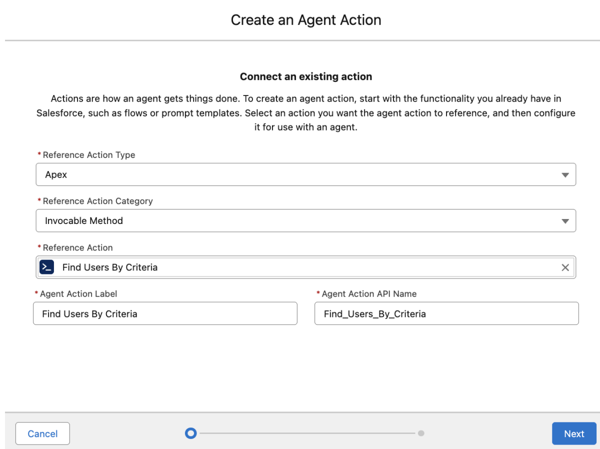
Then go to the **This Topic's Actions** tab.



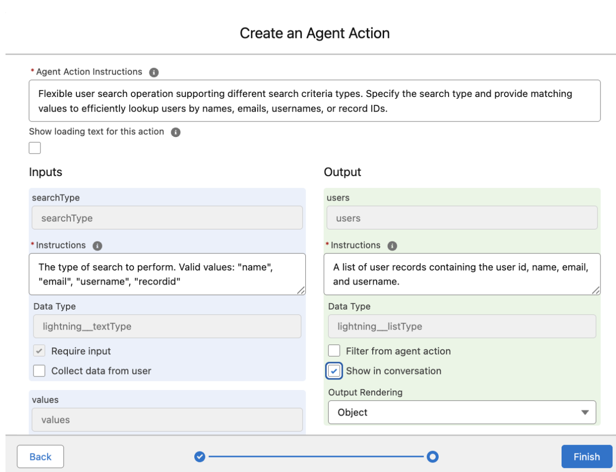
Click on the **new** followed by the **create new action** button.



Select **Apex** for Reference Action Type, **Invocable Method** for **Reference Action Category** and search for the **Find Users By Criteria** action then click **next**.

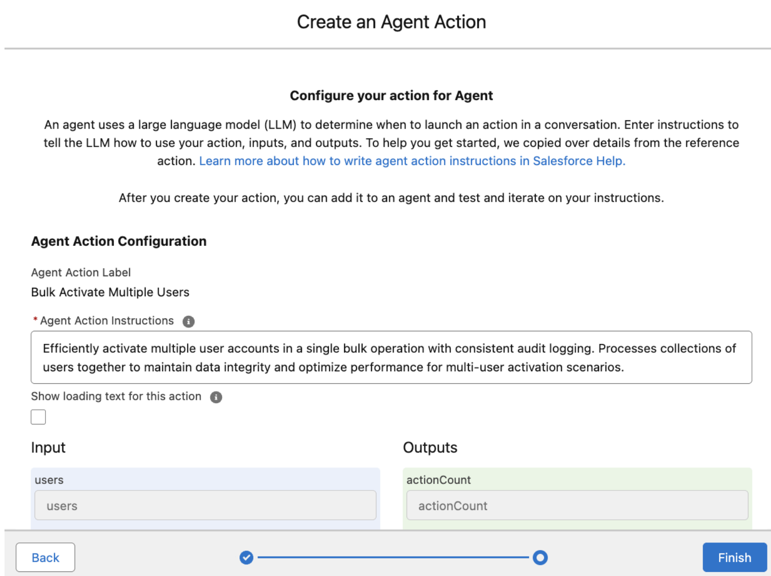


In the next screen uncheck the **Show loading text for this action, keep** the **Output Rendering** on **Object** and check the **Show in conversation** checkbox, then click on the **finish** button.

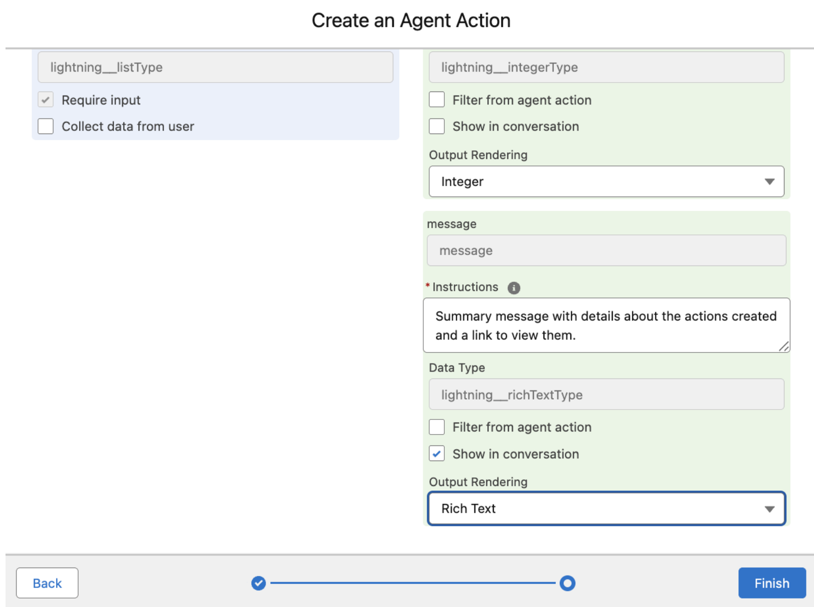


Now add the **Find Single Profile By Name** and **Find Single User Role By Name** actions following the same steps. When that is done you can add the following actions:

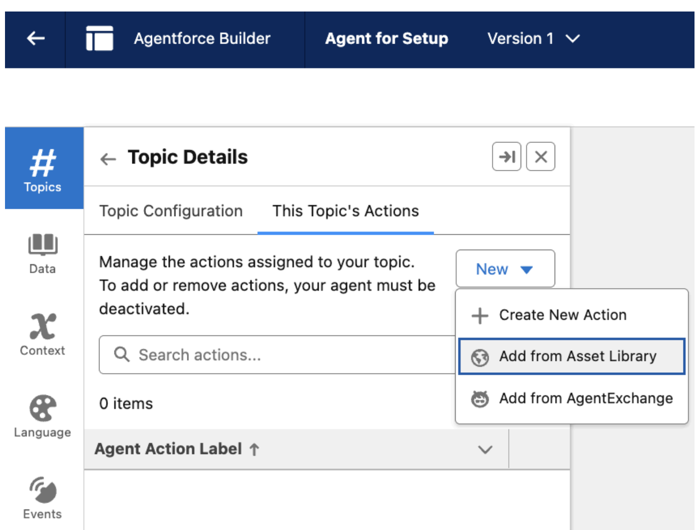
- Bulk Activate Multiple Users
- Bulk Deactivate Multiple Users
- Bulk Lock Multiple User Accounts
- Bulk Unlock Multiple User Accounts
- Bulk Reset Passwords For Multiple Users
- Assign Single Profile To Multiple Users
- Assign Single User Role To Multiple Users



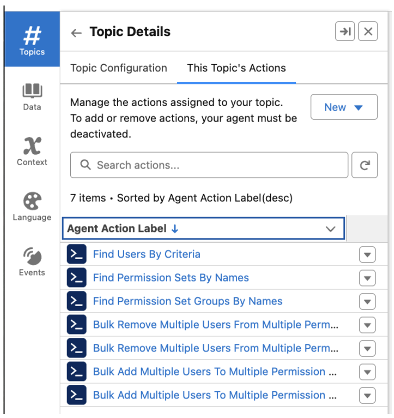
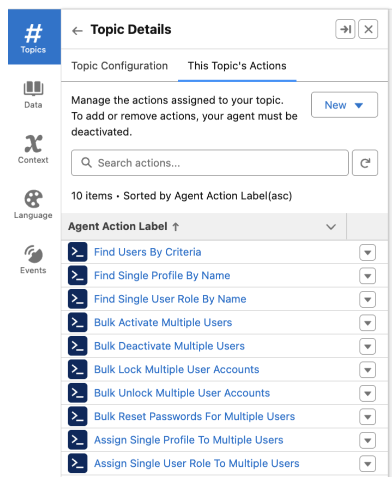
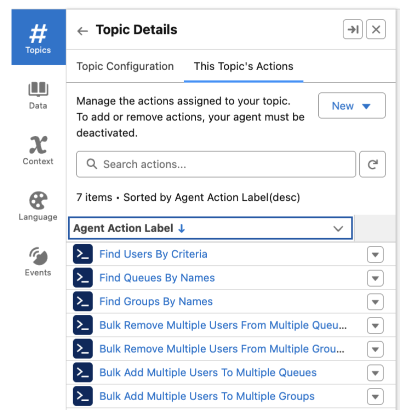
Please make sure when adding these actions to set the **Output Rendering** to **Rich Text** this will make the list view reference clickable for a user to the actions tab.



Since you will be using the **Find Users By Criteria** topic action under all the three different topics you will have to find that existing action in the **Add from Asset Library** the second time around when you want to add it to the next topic you are building out because you already created it previously you should not create a new duplicate topic action for it.

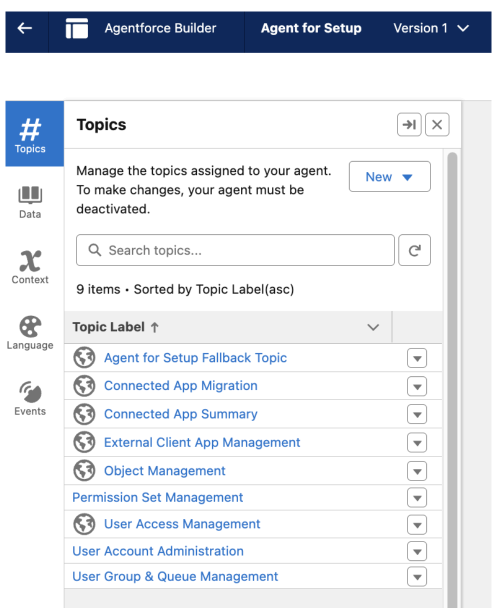


When you have created all the different topic actions under the topics you should have a similar view in your Agentforce Builder.

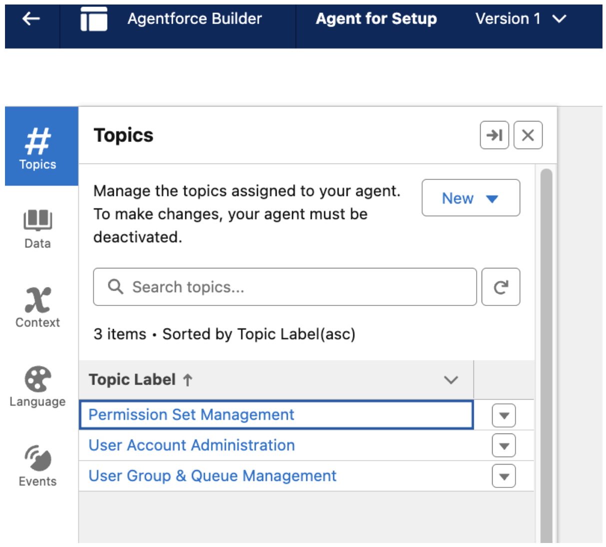
<table>
<tr><th>Permission Set Management</th><th>User Account Administration</th><th>Group & Queue Management</th></tr>
<tr>
<td>
</td>
<td>
</td>
<td>
</td>
</tr>
</table>

Step 6: Activate Agent for Setup

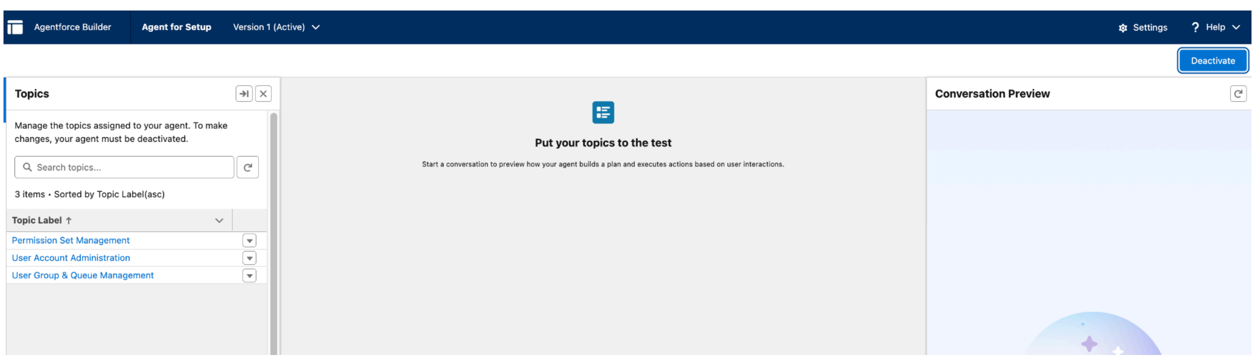
Now that the topics have been created and the topic actions have been assigned we will clean up the unneeded topics under the agent.



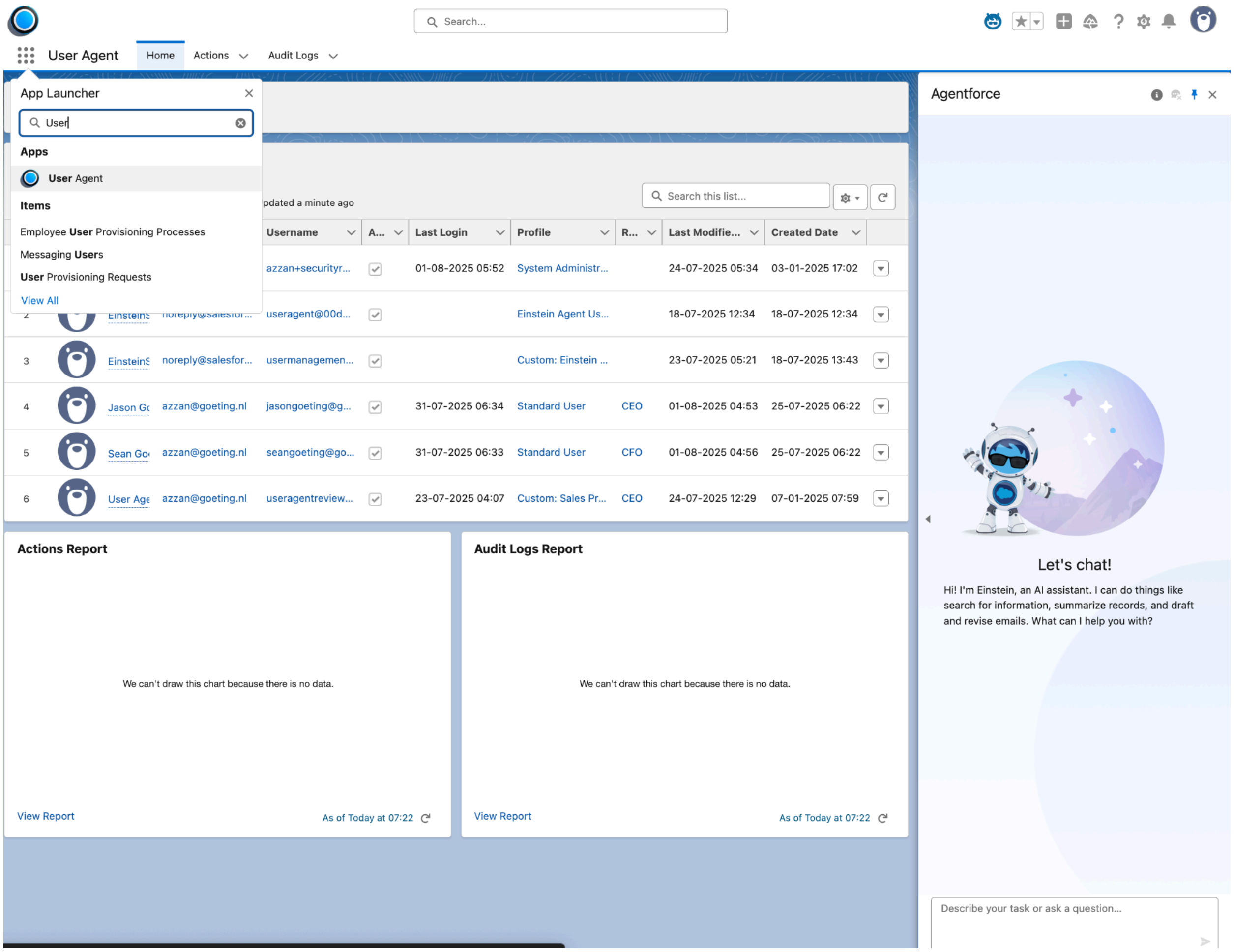
You can remove all the shown topics if you want to limit the capabilities of the agent to just the functionality of the user agent application or leave or add other topics if needed for your operational workflow. In this example we have only left the topics for the user agent application available.



Now you can activate the agent using the **activate** button on the right top of your screen in the Agentforce Builder application.



You can find the application under the **App Launcher** if you look for **User Agent** and you can manage your users by opening **Agentforce** agent at the top right corner of your screen.



Congratulations! You have completed setting up the agentic application!