Creating a SurveyVista Agent
Employee Type

Contents

Introduction

This guide provides step-by-step instructions for creating and configuring a **SurveyVista Agent** using the **Employee** agent type in Salesforce.

A SurveyVista Agent automates survey and response workflows, assists users within their daily flow of work, and enables intelligent search and interaction with survey-related data sources. By setting up an Employee-type agent, organizations can streamline feedback operations for internal teams and ensure accurate, timely access to survey insights.

Purpose and Use Cases

The **SurveyVista Employee Agent** is designed for scenarios where surveys, forms, and feedback collection are targeted toward internal audiences, such as employees, team members, or internal stakeholders.

Key purposes include:

- **Automating internal survey assignments** – Assign surveys to Contacts, Cases, Leads, Users, and other Salesforce records.

- **Centralizing survey insights** – Enable quick search for surveys, responses, and reports from within Salesforce.

- **Assisting in operational workflows** – Help staff locate relevant surveys or results without leaving their workflow.

- **Tracking and improving performance** – Log interactions to monitor agent behavior and refine survey processes.

Common use cases:

- Gathering employee engagement or satisfaction feedback.

- Collecting post-training or post-event evaluations from staff.

- Running internal audits or process improvement surveys.

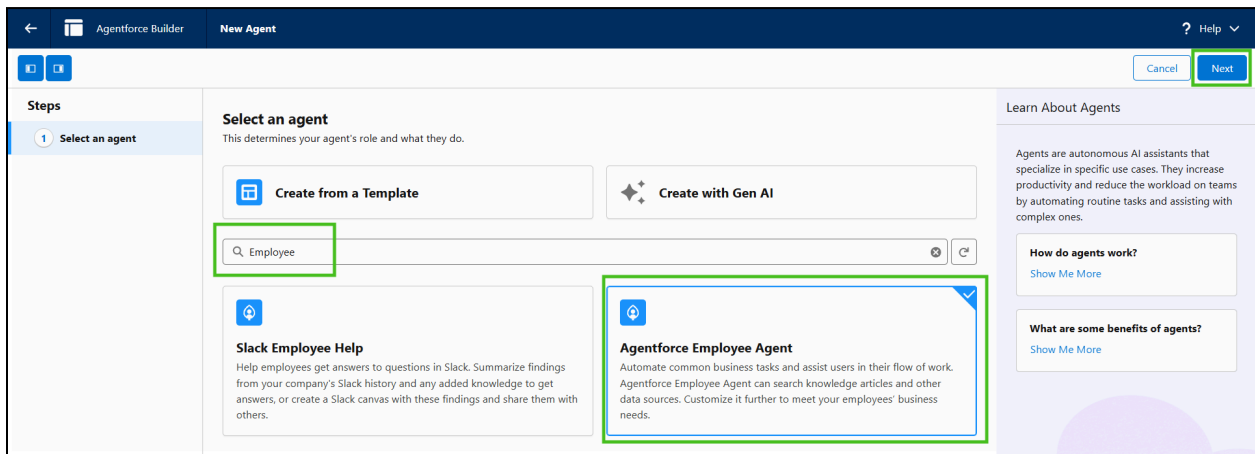- Managing periodic compliance or policy acknowledgement forms.

Create a SurveyVista Agent

- **Go to Salesforce Setup**.
- **Search for "Agents"** in the Quick Search bar and click on it.
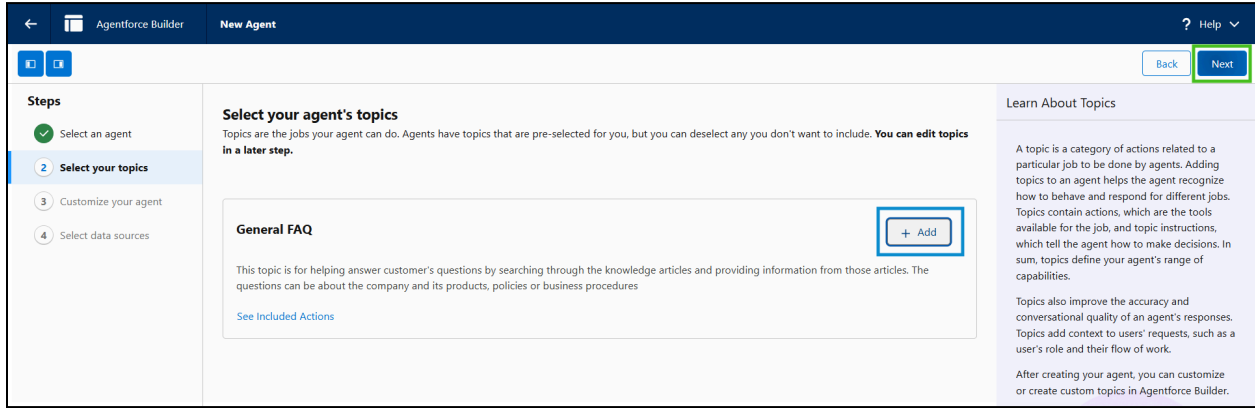- Click the **New Agent** button to create a new agent.
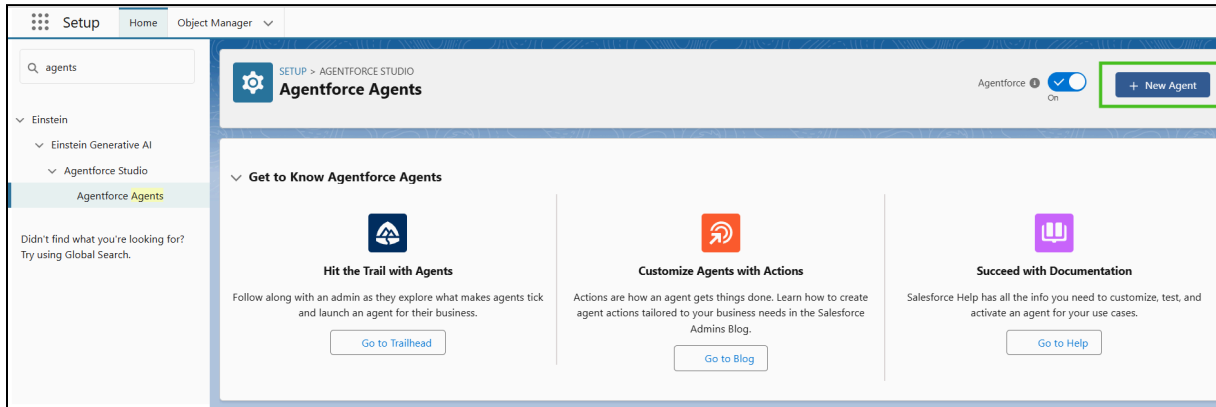
Step 1

- Search for **"Employee"** in the search bar.
- Select the **"Agentforce Employee Agent"** tile.
- Click the **Next** button to proceed.

Step 2

- Select your topics.
  - Deselect **"General FAQ"** by clicking on the **"Added"** button. It will change to **"Add"**.
- Click the **Next** button to proceed.

Step 3

- Customize your agent: Fill in the details as follows:
  - **Name**: SurveyVista Agent
  - **API Name**: SurveyVista_Agent
  - **Description**: Automate Survey & Response business tasks and assist users in their flow of work. The SurveyVista Agent can search for Surveys, Results, Reports, and other data sources.
  - **Role**: You are a SurveyVista Agent responsible for searching Ardira Surveys, searching for Target records, assigning Surveys, and reporting on Results. You will assign Surveys to Target records, where Target records can be Contacts, Cases, Leads, Users, and others.
  - **Company**: Your company provides Feedback Management Solutions, where Surveys & Forms are assigned to various targets and Responses are collected.
  - **Check**: Keep a record of conversations with enhanced event logs to review agent behavior.
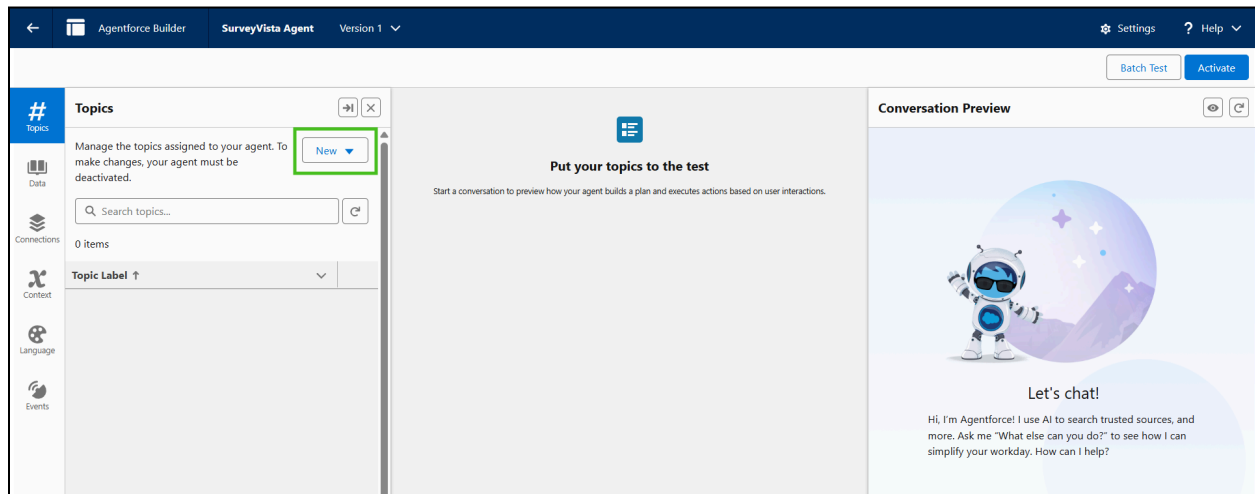- Click the **Next** button to proceed.

Step 4

- **Select data source**: No configuration is needed for this step.
- Finally, click the **Create** button to complete the process.

- Your new **SurveyVista Agent** is now ready.
  - You can now **add topics** as needed to customize the agent's functionality.

Have Questions?

For any questions related to AgentVista and SurveyVista : 100% Native Salesforce Surveys, Forms, Quizzes, Assessments, and Checklists, feel free to Contact us at support@SurveyVista.com