

Getting started with using AI for Salesforce Config and Development

This guide will help you effectively use the AI System Prompt for Salesforce Development and Architecture with AI assistants like Claude or ChatGPT.

1. Choosing Your AI Platform

- **Recommended Model:** As of July 2024, I recommend using Claude 3.5 Sonnet for optimal performance. Both Claude and ChatGPT are good at coding but Claude has proven better at generating all kinds of metadata files.
- **Paid Plans:** Regardless of which provider you choose, I strongly recommend using a paid plan for better performance, longer context windows, and more reliable service.

2. Setting Up Your AI Assistant

For ChatGPT:

1. Create a custom GPT.
2. Upload the "AI System Prompt for Salesforce Development and Architecture" document as Knowledge in your custom GPT settings.

For Claude:

1. Use the Projects feature to create a new project.
2. Upload the "AI System Prompt for Salesforce Development and Architecture" document as Project Knowledge.
3. Note: If you are working in a consulting setting, create a separate project per customer to maintain confidentiality and organization.

3. Preparing for Your Session

1. Start a new conversation with your chosen AI assistant within the appropriate project or custom GPT.
2. If using Claude without a project, copy the entire contents of the "AI System Prompt for Salesforce Development and Architecture" document and paste it into your conversation.
3. Wait for the AI to respond with "I'm ready to rock" (This only happens if you upload the System Prompt into the chat window. It won't happen if you add the prompt to knowledge)

4. Interacting with the AI

- Ask Salesforce-related questions or present scenarios you need help with.
- Be as specific as possible in your queries to get the most accurate and helpful responses.
- You can ask about any topic covered in the prompt, including Apex development, SOQL queries, Lightning Web Components, security, data modeling, etc.

5. Best Practices for Using the AI

- Start with broader questions and then narrow down to specifics.
- If you need code examples, explicitly ask for them.
- For complex problems, break them down into smaller, manageable parts.
- Always verify the AI's suggestions against current Salesforce documentation, as the AI's knowledge cutoff may not include the latest updates.
- Don't upload any sensitive data, personally identifiable information or api keys.

6. Example Queries

Here are some example queries to get you started:

- "What are the best practices for optimizing SOQL queries in a trigger?"
- "Can you explain the benefits of using Lightning Web Components over Aura components?"
- "How can I implement proper security measures in my Apex code?"
- "What's the most efficient way to perform bulk data operations in Salesforce?"
- "Generate a Lightning Web Component that displays Opportunity Line Items in a spreadsheet-like interface that can be updated without leaving the Opportunity record page."
- "Revise this user story so that Salesforce best practices are considered: 'As a sales rep, I want to be able to create new accounts and contacts from the opportunity page.'"
- "Design a data model for a basic learning management system within Salesforce."
- "What is the best practice for using profiles vs permission sets in Salesforce?"
- "Review this Apex trigger and suggest optimizations to improve its performance and adherence to best practices."

7. Limitations and Considerations

- The AI assistant doesn't have real-time access to your Salesforce org or any specific implementation details unless you provide them.
- While the AI can provide code snippets and architectural advice, always test and validate solutions in a sandbox environment before implementing in production.
- The AI's knowledge is based on its training data cutoff. For the most up-to-date information, always refer to official Salesforce documentation.

8. Iterative Learning and Expanding AI Knowledge

- If you find gaps in the AI's knowledge or areas where it could be more helpful, make note of these.
- You can iteratively improve the System Prompt by adding more specific information or guidelines based on your experiences. Please consider sharing these back with me so I can make the prompt better for everyone.
- When you come across examples or documentation that is useful for the AI to know:
 1. Ask Claude to create an artifact from the content you want to add. For example: "Claude, please create an artifact from the following content: <paste content here>"
 2. Once Claude has created the artifact, click the icon to add the artifact to project knowledge.
 3. This process allows you to expand the AI's knowledge base with relevant, up-to-date information specific to your Salesforce development needs.

Remember, the AI assistant is a powerful tool to augment your Salesforce development and architecture processes, but it should be used in conjunction with your expertise and official Salesforce resources.

9. Maintaining Your AI Knowledge Base

- Regularly review and update your project knowledge to ensure it remains current and relevant.
- Remove outdated information or examples that no longer align with best practices.

By following these practices, you can create a customized, ever-evolving AI assistant that becomes increasingly tailored to your specific Salesforce development and architecture needs.