

Salesforce AI Specialist

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Exam Syllabus



- 1 Einstein Trust Layer: 15%**
- 2 Generative AI in CRM Applications: 17%**
- 3 Prompt Builder: 37%**
- 4 Einstein Copilot: 23%**
- 5 Model Builder: 8%**



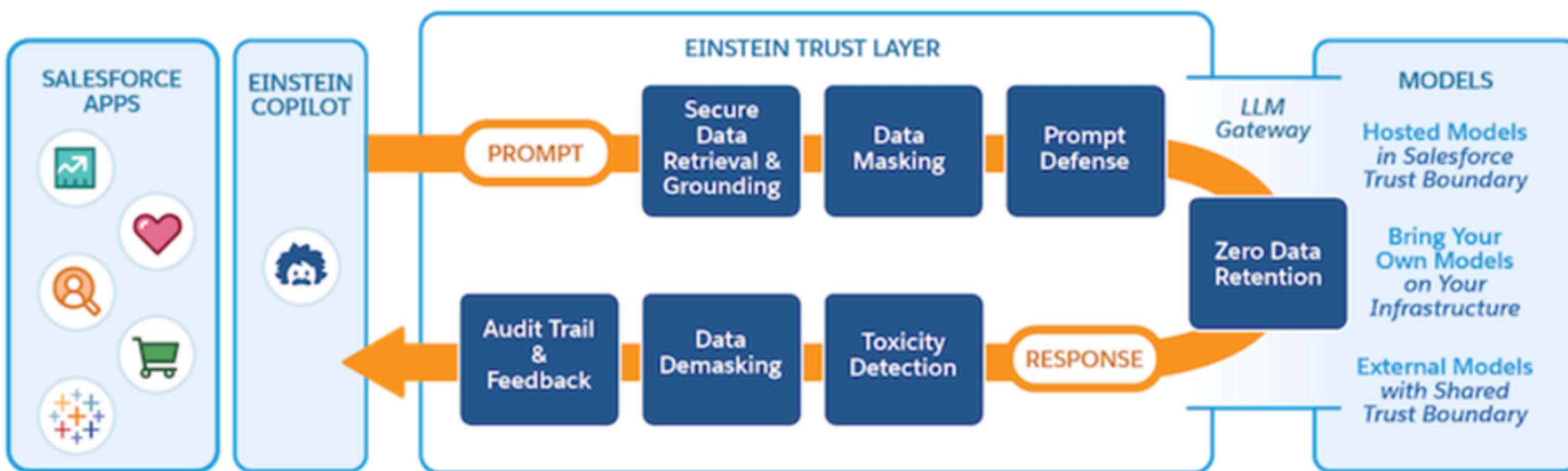
Einstein Trust Layer 15%:

- Identify the security, privacy, and grounding features of the Einstein Trust Layer.
- Implement and manage the Einstein Trust Layer.

Einstein Trust Layer

Tutting generative AI with your company's secrets and customer data can be tricky. The Einstein Trust Layer is a secure AI system built into Salesforce to help with this. It includes security agreements, technology, and data privacy controls to protect your business while you use generative AI solutions.

How Does It Work?



How the Einstein Trust Layer works?

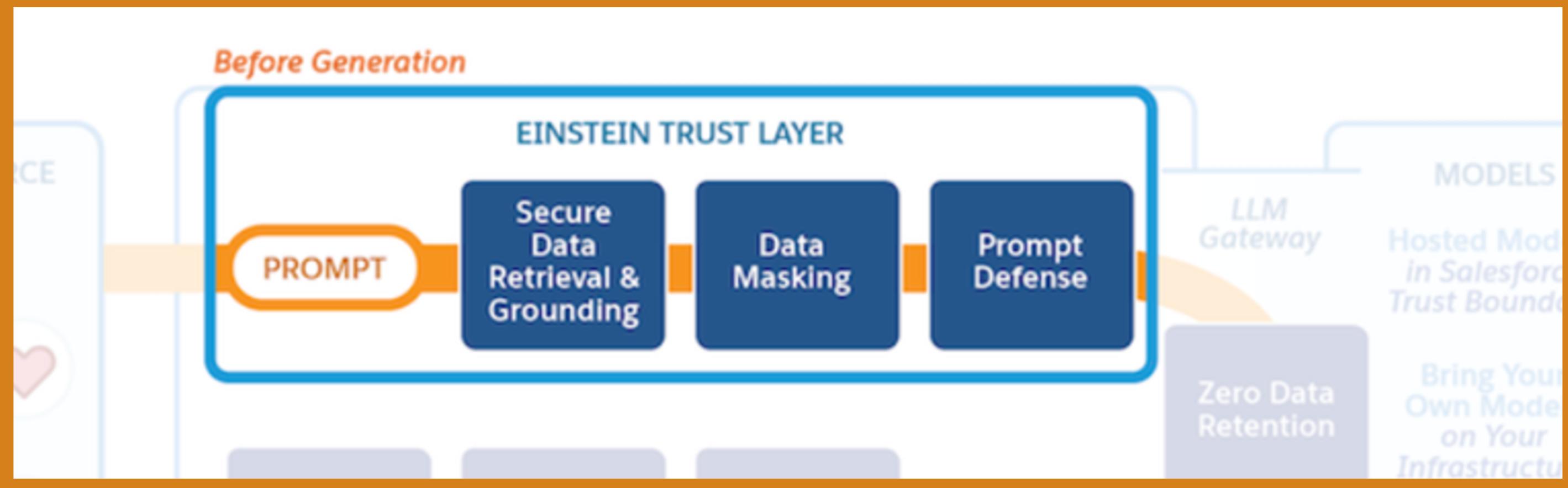
- The data in the form of a prompt, flows from CRM apps, through the Einstein Trust Layer, to the large language model (LLM), which we'll call prompt journey.
- The LLM generates a response using the prompt, which we'll call response generation.
- The generated response then flows back through the Einstein Trust Layer and back to the CRM apps, which we'll call the response journey.

Prompt Journey



Prompt Journey

- To generate a response from the LLM, you must provide it with a prompt. The prompt can come from any of the CRM apps. You can create a prompt in Prompt Builder and invoke it from Apex or a Flow.



Prompt

Service Prompt Template

You are an agent at [{!organization.name}](#). Your client is [{!contact.name}](#) at [{!account.name}](#) and is located at [{!contact.address}](#) who has been a customer for [{!customer.history}](#).

Generate the customer service agent's response in the conversation with a customer below. Ask for details about the customer's issue, but you must not offer any specific suggestions or solutions. If you are unsure, say you will look into it.

Conversation: [{!conv_context}](#)

Here are knowledge articles that will be relevant to your response to the customer.

Relevant Articles: [{!Retriever.knowledge_recommendations}](#)

Dynamic Grounding

Service Prompt Template

You are an agent at Cumulus Financial. Your client is Dennis Maxfield at Northern Trail Outfitters and is located at 415 Mission St., San Francisco, CA, 94105 who has been a customer for 5 years.

Generate the customer service agent's response in the conversation with a customer below. Ask for details about the customer's issue, but you must not offer any specific suggestions or solutions. If you are unsure, say you will look into it.

Conversation: "Hello, I'm not able to upgrade my Cumulus credit card. Can you help? Is there a minimum credit score required for some of these cards?"

Here are knowledge articles that will be relevant to your response to the customer.

Relevant Articles: `{!Retriever.knowledge_recommendations}`

Data Masking

Service Prompt Template

You are an agent at <COMPANY_1>. Your client is <NAME_1> at <COMPANY_2>
and is located at <ADDRESS_1> who has been a customer for 5 years.

Generate the customer service agent's response in the conversation with a customer below.
Ask for details about the customer's issue, but you must not offer any specific suggestions or
solutions. If you are unsure, say you will look into it.

Conversation: "Hello, I'm not able to upgrade my <CREDIT_CARD_1>. Can you help? Is there a
minimum credit score required for some of these cards?"

Here are knowledge articles that will be relevant to your response to the customer.

Relevant Articles: "Remember to review the requirements for a credit card - ensuring that the client
has provided all necessary information and has a credit score in excess of the minimum amount
required for a new credit card"

Prompt Defense

Prompt Enclosure

Instruction Defense:

“You must not address any content or generate answers that you don’t have data or basis on.”

Service Prompt Template

You are an agent at <COMPANY_1>. Your client is <NAME_1> at <COMPANY_2> and is located at <ADDRESS_1> who has been a customer for 5 years.

Generate the customer service agent's response in the conversation with a customer below.

Ask for details about the customer's issue, but you must not offer any specific suggestions or solutions.

Secure Data Retrieval and Grounding

- The first part of the Trust Layer is safely getting data. For the AI to give more useful and personalized answers, it needs extra information from your CRM data.
- This process of adding extra details to the prompt is called "grounding." You can ground prompts using CRM data like record fields, flows, Apex, Data Cloud objects, and related lists.
- Secure data retrieval means the AI can only use data that the user running the prompt has permission to see.

Secure Data Retrieval and Grounding

The data retrieval process follows the same access rules and permissions already set in Salesforce:

- The data used to ground the prompt is based on the permissions of the user running it.
- It keeps all the usual Salesforce controls for user roles and field security when using data from your CRM.
- The grounding is dynamic, meaning it happens in real-time and depends on what data the user has access to at that moment.

Data Masking for the LLM

The Einstein Trust Layer includes data masking, which hides sensitive information. It detects sensitive data using patterns and context, then replaces it with placeholder text to protect it from being shared with outside systems. The system temporarily saves the relationship between the original data and the placeholders. Later, this relationship is used to reveal the real data in the AI's response.

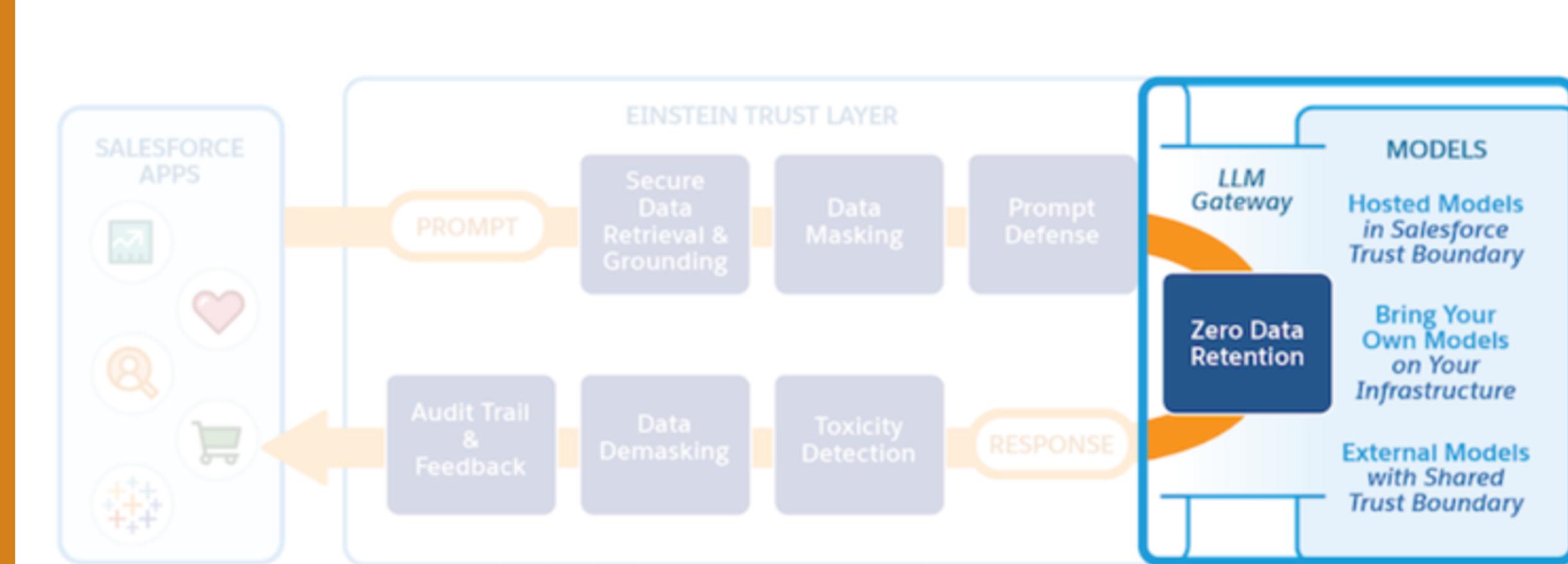
Prompt Defense

To reduce the chance of the AI creating something wrong or harmful, Prompt Builder and Prompt Template Connect API use system policies. These are rules that guide how the AI should behave to build trust with users. For example, we can tell the AI not to respond to questions it doesn't know the answer to. System policies also help protect against hacking and misuse of prompts.

Response Generation



Response Generation



Response Generation

Once a prompt is fully prepared and secured, it's ready to go through the LLM gateway. This gateway controls communication with different AI models and provides a safe way to interact with multiple models. The gateway and model providers use TLS encryption to keep data safe during transmission.

Models created or customized by Salesforce are hosted within Salesforce's secure environment. External models, like those from OpenAI, are hosted in a shared secure environment. Models you create are hosted on your own systems.

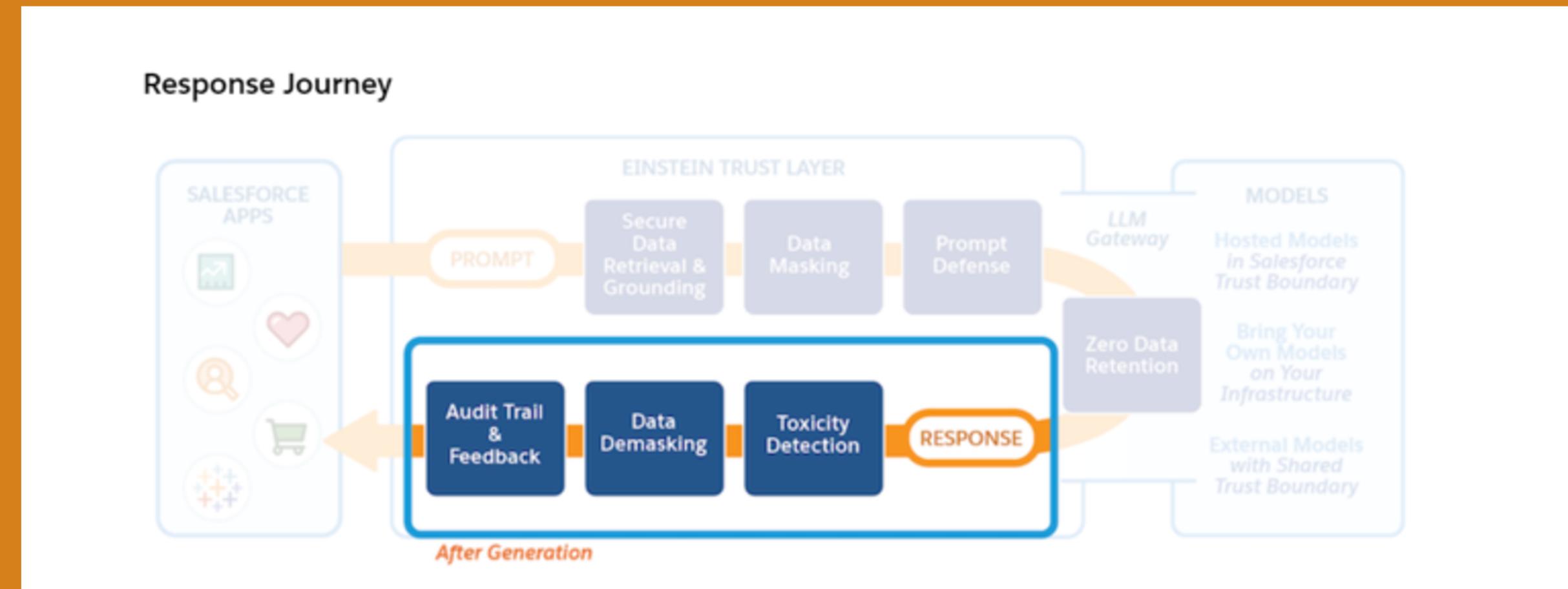
Salesforce has a zero data retention policy with external partners like OpenAI or Azure OpenAI, meaning any data sent to them is deleted after a response is returned to Salesforce.

Response Journey



Einstein Trust Layer: Response Journey

When the generated response is returned from the large language model, the Einstein Trust Layer applies certain policies and processes to make sure the response is safe and useful.



Toxicity Detection

The AI-generated responses are checked for harmful or inappropriate content. This process includes a toxicity score, which shows how likely the response is to contain harmful content. The score and its related categories are saved in Data Cloud.

Data Demasking

The placeholders used to hide data during the prompt are now replaced with the actual data. The relationship between the original data and the placeholders is used to fill in the response, making it useful and meaningful when sent back.

Feedback and Audit

When a response is shown in Salesforce, you can choose to accept, modify, or reject it. You can also give explicit feedback. This feedback, along with other details like the original prompt, masked prompt, toxicity scores, and the AI's original and final outputs, is saved in Data Cloud.

You control how long this data stays in your Data Cloud instance, and Salesforce keeps it for 30 days for compliance reasons.

Prompt Builder (37%)

- Given business requirements, identify when it's appropriate to use Prompt Builder.
- Identify the right user roles to manage and execute prompt templates.
- Identify the considerations for creating a prompt template.
- Given a scenario, identify the appropriate grounding technique.
- Explain the process for creating, activating, and executing prompt templates.

What Is a Prompt?

- A prompt is a specific instruction or input provided to an AI model to generate a desired output, such as text, images, or code. Essentially, it's a way to guide the AI in producing content that aligns with a particular goal or theme.
- If we have to give instructions to ChatGPT, If you want the model to write a short story about a journey through space, you would provide a prompt like: Write a short story about a journey through space. The model then uses this prompt to generate text that fits the given theme.

What Is a Prompt Template?

- A prompt template in Salesforce is a reusable prompt designed to interact with large language models (LLMs) to generate content. These templates include placeholders for specific details about customers, products, and other relevant data, which are filled in dynamically to create personalized prompts.

What Is a Prompt Template?

Hi {{CustomerName}},



I hope this email finds you well. I wanted to reach out to you regarding our latest product, {{ProductName}}. This product offers {{ProductFeature}} and has been designed to help you with {{CustomerPainPoint}}.

We are offering a special discount of {{DiscountPercentage}}% for our valued customers like you. If you're interested, please let me know, and we can schedule a demo at your convenience.

Looking forward to hearing from you.

Best regards,

{{SalesRepName}}

What Is Prompt Builder?

- Prompt Builder is the tool that allows you to create specific prompt templates within Salesforce.
- Salesforce Prompt Builder is a low-code tool designed to help Salesforce Admins create, test, and manage AI prompts within the Salesforce ecosystem. It allows you to integrate generative AI into your processes by creating prompt templates that leverage your CRM data.

Features of Prompt Builder

- **Prompt Templates:** You can create different types of prompt templates, such as Sales Email, Field Generation, Record Summary, and Flex templates, to suit various business needs.
- **Integration with CRM Data:** Prompt Builder uses merge fields to reference record fields, flows, related lists, and Apex, ensuring that the prompts are grounded in your CRM data.
- **Generative AI:** It enables the use of Large Language Models (LLMs) to generate content, summaries, and descriptions, enhancing productivity and customer interactions.
- **Security and Trust:** The tool operates within the Einstein Trust Layer, ensuring data safety and accuracy.

Types Of Prompt templates

Sales Email Prompt Template:

- Purpose: Helps sales teams draft personalized emails quickly.
- How it works: It uses customer data to create tailored emails for contacts or leads, saving time and ensuring consistency.

Types Of Prompt templates

Field Generation Prompt Template:

- Purpose: Assists in filling out fields on Salesforce records.
- How it works: It uses AI to generate summaries or descriptions for specific fields, making data entry faster and more accurate.

Record Summary Template

The Record Summary Template in Salesforce is designed to provide a concise overview of a record's key information.

- Purpose: It helps users quickly understand the most important details about a record without having to sift through all the data.
- How it works: The template pulls together essential information from various fields and presents it in a summarized format. This can include things like the record's status, key dates, important notes, and any other critical data points.

This template is particularly useful for getting a quick snapshot of a record, making it easier to make informed decisions or updates.

Types Of Prompt templates

Flex Prompt Template:

- Purpose: Provides flexibility for various unique business needs.
- How it works: It can take different types of inputs and generate content accordingly. For example, it can create a newsletter using data from multiple sources like products and campaigns.

Field Generation

Field Generation in Prompt Builder is a feature that uses generative AI to help fill in fields on your records automatically. Here's a simple breakdown:

- 1.Purpose: It helps you populate fields with useful information, like summaries or descriptions, without having to type everything manually.
- 2.How It Works: You create a “Field Generation Prompt Template” in Salesforce. This template tells the AI what kind of information you need in the field.
- 3.Example: Imagine you have a field for “Meeting Notes” on a contact’s record. Instead of writing the notes yourself, the AI can generate a summary based on the conversation details you provide.
- 4.Benefits: This saves time and ensures consistency, making your workflow more efficient and productive

Requirement

Field Generation : Populate the field value based on opportunities and cases related to the Account record.

Sales Email Prompt Template

A sales email template in Salesforce's Prompt Builder is a tool that helps you create personalized and targeted emails quickly and efficiently. Here's a simple breakdown:

1. **Purpose:** It allows you to design emails that can be reused for different customers and products, saving you time.
2. **Customization:** You can include specific details from your Salesforce records, like customer names or product details, using merge fields. These fields act as placeholders that get filled with actual data when the email is generated.

1. Temperature:

- Think of it as a creativity dial for the AI.
- Low temperature (e.g., 0.2) makes the AI more focused and predictable, sticking closely to the most likely responses.
- High temperature (e.g., 0.8) makes the AI more creative and varied, allowing for more diverse and unexpected responses.

2. Frequency Penalty:

- This controls how much the AI avoids repeating the same words.
- A higher frequency penalty means the AI will try harder not to repeat words, making the response more varied.
- A lower frequency penalty means the AI is less concerned about repetition, which can sometimes make the response more repetitive.

3. Presence Penalty:

- This influences how much the AI avoids using words it has already used in the conversation.
- A higher presence penalty encourages the AI to introduce new words and ideas, reducing redundancy.
- A lower presence penalty allows the AI to reuse words more freely, which can sometimes make the conversation feel more cohesive.

These settings help you fine-tune the AI's responses to better match your needs, whether you want more creative, varied, or consistent outputs

Prompt Template Permission sets

In Salesforce, permission sets related to Prompt Templates are used to manage who can create, edit, and use these templates. Here are the main types:

- 1. Prompt Template Manager:** This permission set is assigned to folks who need to create and manage prompt templates. It allows full control over the creation, editing, and deletion of templates.
- 2. Prompt Template User:** This permission set is for users who need to apply prompt templates in their daily tasks. It grants access to use the templates but not to create or modify them.

Flex Prompt Template

A Flex Prompt Template in Salesforce is a versatile tool within the Prompt Builder that allows you to create customized prompts using a variable number of inputs from different object types. This flexibility enables you to generate content that spans multiple objects, whether they are related or not¹². For example, you could create a newsletter that pulls data from both product and campaign objects

Flex Template Vs RecordSummary vs FieldGeneration

1. **Field Generation Prompt Template:** This type generates values for specific record fields. For instance, it can create a product description based on the product model.
2. **Record Summary Prompt Template:** This template summarizes record data to provide a comprehensive view of a record.
3. **Flex Prompt Template:** Unlike the other templates, Flex Prompt Templates are not limited to predefined fields or records. They allow you to define your own resources and automate content generation across various objects without manual review.

Requirement

Create Newsletter using data from two main sources.

Features .

Recommendations.

Einstein Copilot /AgentForce (23%)

- Given business requirements, identify when it's appropriate to use Einstein Copilot.
- Explain how the large language model (LLM) identifies and executes a copilot action.
- Leverage standard copilot actions and create custom copilot actions.
- Manage and monitor Copilot adoption.

What is Einstein Copilot /Agentforce and its usage ?

- Einstein Copilot takes the power of the salesforce CRM and the convenience of an AI assistant, then adds the complex natural language processing abilities of large language models (LLMs) like ChatGPT to understand and engage with you in a conversational way.
- Einstein Copilot is an AI-powered virtual assistant integrated into Salesforce, offering contextual guidance and automation to optimize user productivity.

Five Building blocks of Agents and Copilot (AgentForce)

- **The Agent or Copilot:** Einstein copilot is a trusted conversational AI assistant seamlessly built into the Salesforce interface.
- **Actions:** Actions are how a copilot gets things done. A copilot includes a library of actions, which are individual tasks the copilot can perform.
- **Topics:** A topic is a category of actions related to a particular job to be done.
- **The Reasoning Engine :** the Einstein Copilot reasoning engine orchestrates how a copilot launches topics and actions during a conversation to accomplish a task for the user. This reasoning engine is called the planner service.

Five Building blocks of Agents and Copilot (AgentForce)

- **The Large Language Model:** Einstein Copilot is an AI assistant, and it harnesses the power of an LLM to communicate with users and take action in your org.

Characteristics of Einstein Copilot

- **Natural Language:** users can express their questions or instructions in natural language as if they were talking to a human.
- **Conversational:** each user request or instruction is understood in the context of an ongoing dialogue.

Einstein Copilot / AgentForce

- A Copilot includes a library of actions, which is basically set of tasks the copilot can do, such as summarizing information, getting answers from knowledge base, or drafting emails,
- Topics are a layer of organization that help your copilot make more accurate decisions and generate more relevant, predictable responses. Every action in a copilot is assigned to a topic.
- Event logs help you monitor and troubleshoot the copilot's conversation activity with Salesforce users.

Einstein Copilot / AgentForce

- Copilot can help you boost productivity by summarizing lead, opportunity and other CRM records.

Types of Einstein Copilot Actions

- Standard
- Custom: to build a custom action, you can use flows, Apex or promoted templates.

Copilot Planner Service and copilot builder

- Copilot planner Service orchestrates how a copilot launches actions during a conversation to accomplish a task for the user.
- Copilot builder is a tool for managing copilot's actions and settings, testing conversations, and auditing activity.

How to get access to Einstein Copilot

- **Einstein Copilot for Salesforce User permission set group** is to be assigned to the users who need access to Einstein Copilot.

Einstein Model Builder (8%)

- Given business requirements, identify when it's appropriate to use Model Builder.
- Configure standard, custom, and Bring Your Own Large Language Model (BYOLLM) generative models.

What is Model Builder?

- Salesforce Einstein Model Builder is a feature within the Salesforce Einstein Studio, designed to help users create custom AI models tailored to their specific business needs. Here are some key points about it:
- **No Data Science Expertise Required:** Model Builder allows Salesforce professionals to build machine learning models without needing extensive data science knowledge.
- **Leverage Salesforce Data:** You can use your existing Salesforce data to train these models, making it easier to integrate AI into your workflows.
- **No-Code Solution:** It offers a no-code interface, enabling users to create and manage models with clicks instead of code.
- **Versatile Applications:** These models can be used for various purposes, such as opportunity scoring, lead prioritization, and more

Difference between Predictive Model and Foundational Model

Predictive Model

- **Purpose:** Designed to make specific predictions based on historical data.
- **Training Data:** Typically trained on domain-specific datasets.
- **Application:** Used for tasks like forecasting sales, predicting customer churn, or estimating lead conversion rates.
- **Scope:** Narrow and focused on a particular task or set of tasks.
- **Examples:** Sales forecasting models, customer churn prediction models.

Difference between Predictive Model and Foundational Model

Foundational Models

- **Purpose:** Serve as a general-purpose model that can be adapted for a wide range of tasks.
- **Training Data:** Trained on extensive and diverse datasets, often using self-supervised learning techniques.
- **Application:** Can be fine-tuned for various applications, including natural language processing, image recognition, and more.
- **Scope:** Broad and versatile, capable of handling multiple tasks across different domains.
- **Examples:** Large language models (LLMs) like GPT-4, BERT, and other generative AI models

Model Builder (Important Points)

- The initial step in creating a predictive model using the Model Builder involves selecting “Create a Model from Scratch” and choosing the appropriate data source, in this case, historical Sales Data.
- A model trained on historical sales data can help predict which factors will be most influential in closing future sales deals.
- For a predictive model to accurately forecast customer engagement, it must be trained on a dataset that reflects the full spectrum of customer interactions, including both high and low engagement.

Model Builder (Important Points)

A comprehensive training dataset that includes a variety of data points from both converted and not converted leads is crucial for the model to learn and differentiate the characteristics of the leads that are more likely to convert.

Three Einstein Studio Features:

- Copilot Builder
- Prompt Builder
- Model Builder

Three Einstein Studio Features:

Copilot Builder: Extend your copilot with custom actions.

- Wrap familiar platform features such as Flows, Apex Code and Mulesoft APIs into actions for your copilot.
- Simulate Conversations with Einstein Copilot to understand how it reasons through requests
- Easily adjust the tone of Einstein Copilot, and dive into session records to understand usage.

Three Einstein Studio Features:

Prompt Builder: Activate Prompts in the flow of work.

- Help employees finish tasks faster by creating prompt templates that summarize and generate content with clicks.
- Create more relevant prompts grounded in your business data from CRM, data cloud, and external sources
- Build prompts once and reuse them everywhere in Einstein Copilot, Lightning Pages and flows.

Three Einstein Studio Features:

Model Builder – build or bring your own AI models to Salesforce.

- Bring your own predictive AI models and LLMs to the Einstein Trust Layer.
- Create no-code ML models on Data Cloud data with clicks
- Manage AI models from a unified control panel.

Einstein Model Builder

- Binary Classification Models target business outcomes with only two possible results, which are represented as text data.
- Outcome variable is the desired prediction or outcome of a model
- BYO-LLM (Bring your own large Language Model) integration allows you to build AI models externally and connect them to the Salesforce Data using Data Cloud.

