

DMD User Guide

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The goal of this document is to provide information to administrators so that they can configure the DMD app in Salesforce.

The guide also provides instructions for end-users to help them get the most out of the functionality in the application.

DMD checks documents using Open AI GPT-4 model.

The document types and rules that you can run depend on your customization. See the user guide for details on how to customize the rules and rules sets that will be run against the documents.

Installation

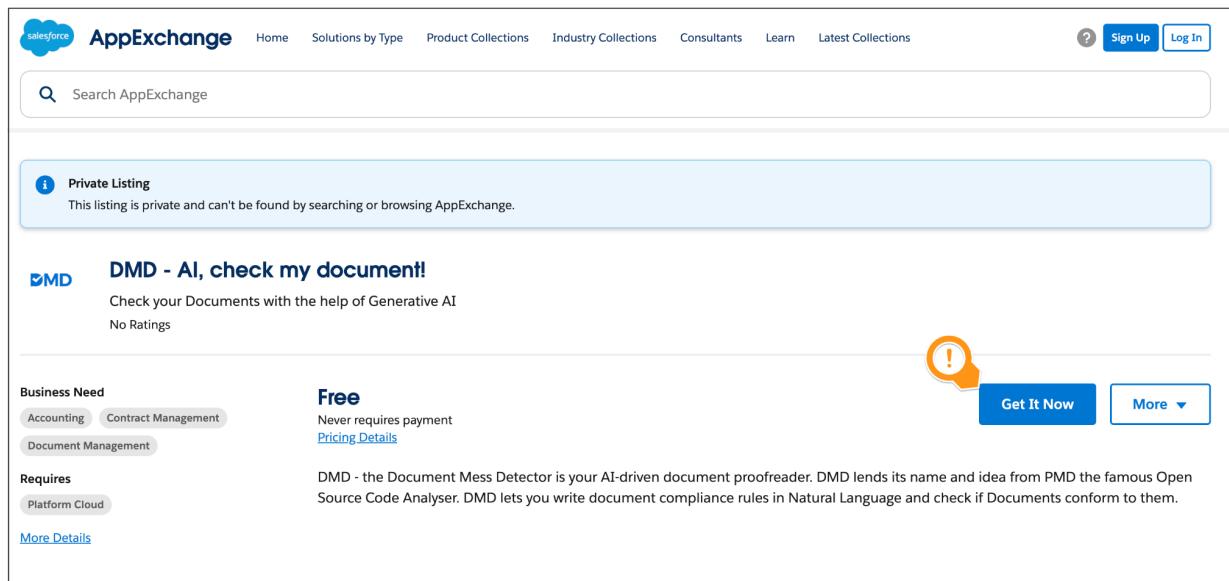
Follow the steps below in the given order to install the DMD Salesforce app to your Salesforce environment.

Most of those steps require you to be a System Administrator of your Salesforce production org.

Install App from the AppExchange

Load the AppExchange Listing page in your browser. You should see something like this. Click the big Install button.

It will ask you to log in to your Salesforce organization. Do that when asked for and continue the installation.



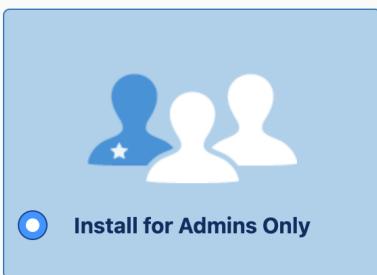
The screenshot shows the AppExchange listing for the DMD app. At the top, there's a banner indicating it's a private listing. Below that, the app's name 'DMD - AI, check my document!' is displayed, along with its purpose: 'Check your Documents with the help of Generative AI'. It shows 'No Ratings' and has a 'Business Need' section with tags for Accounting, Contract Management, and Document Management. The price is listed as 'Free' with the note 'Never requires payment' and a link to 'Pricing Details'. To the right, there's a large orange 'Get It Now' button with a magnifying glass icon, and a 'More' dropdown menu. The overall interface is clean and modern.

In the next screen, you will be asked who to grant access to the app. We recommend sticking with the default "Install for Admins Only."

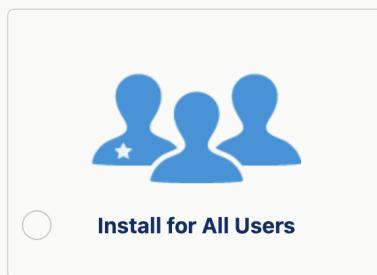


Install DMD - Document Mess Detector

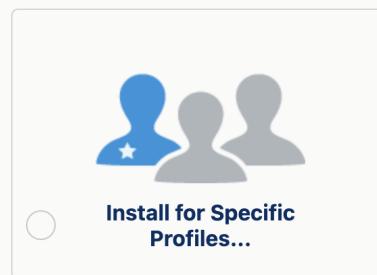
By Aquivalabs (Packaging DMD)



Install for Admins Only



Install for All Users



Install for Specific Profiles...



You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. [i](#)



I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

[Install](#)

[Cancel](#)

App Name

DMD - Document Mess Detector

Publisher

Aquivalabs (Packaging DMD)

Version Name

1.28

Version Number

1.28

Additional Details

[View Components](#)

The App is making use of multiple external APIs and you need to approve the usage on this screen.

By DMD (Document Mess Dector) Packaging Org

An earlier version is installed. It can be upgraded while preserving existing data.
Installed: 1.6 (1.6) New Version: 1.7 (1.7) [X](#)

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
api.openai.com	<input checked="" type="checkbox"/>
v2.convertapi.com	<input checked="" type="checkbox"/>

Yes, grant access to these third-party web sites

[Continue](#) [Cancel](#)

You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. [i](#)

I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Once the installation has started, the following status will appear:

The screenshot shows the Salesforce AppExchange listing for the 'Install DMD - Document Mess Detector' app. At the top, there's a green download icon and the app name. Below it, it says 'By Aquivalabs (Packaging DMD)'. A progress bar indicates the installation status: 'Installing and granting access to admins Only...' with a sun-like icon. Below the progress bar, there's a table with the following data:

App Name	Publisher	Version Name	Version Number
DMD - Document Mess Detector	Aquivalabs (Packaging DMD)	1.28	1.28

At the bottom of the listing, there are links for 'Additional Details' and 'View Components'.

The installation process may take some minutes. Take into account that, in case the installation time takes longer than the default threshold, Salesforce will notify asynchronously via e-mail.

Grant Permissions for App Setup

For the Admin user to be able to set up the DMD package, the Admin user will require the necessary permissions to view the pages and perform actions such as authorization or configuration. Those permissions are provided through the *DMD App Administrator* permission set, included in the installed package.

To provide the mentioned permission set to the Admin user, navigate to *Users* in the Setup Menu, select the Admin user, and Edit the permission set assignment, by adding the *DMD App Administrator* permission set. The steps are displayed in the below screenshots.

1. Users Section

2. DMD Admin User

3. Edit Permission Set Assignments

User	Alias	Email	Username	Nickname	Company	Department	Division	Address	Time Zone	Locale	Language	Delegated Approver	Manager	Receive Approval Request Emails	Federation ID	User License	Salesforce Profile
Admi Admi 2. DMD Admin User	AAdmi	[REDACTED]@apuvilabs.com [Verified]	admin@mdm.usf	User16841585849481296098	DMD UAT			US	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	English (United States)	English			Only if I am an approver		System Administrator	Active
																Marketing User	✓
																Offline User	<input type="checkbox"/>
																Sales Anywhere User	<input type="checkbox"/>
																Flow User	<input type="checkbox"/>
																Service Cloud User	<input type="checkbox"/>
																Mobile Push Registrations	<input checked="" type="checkbox"/>
																Accessibility Mode (Classic Only)	<input type="checkbox"/>
																Debug Mode	<input type="checkbox"/>
																High-Contrast Palette on Charts	<input type="checkbox"/>
																Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
																Send Apex Warning Emails	<input type="checkbox"/>
																Make Setup My Default Landing Page	<input type="checkbox"/>
																Quick Access Menu	<input checked="" type="checkbox"/>
																Development Mode	<input type="checkbox"/>

Verify installation

Once the package has been successfully installed and the Admin user has the permissions, an app named *DMD - AI, check my document!* will be visible in the App Launcher.

Setup **Home** **Object Manager**

Apps

DMD - AI, check my document!

Items

No results

View All

Release Updates

Lightning Experience Transition

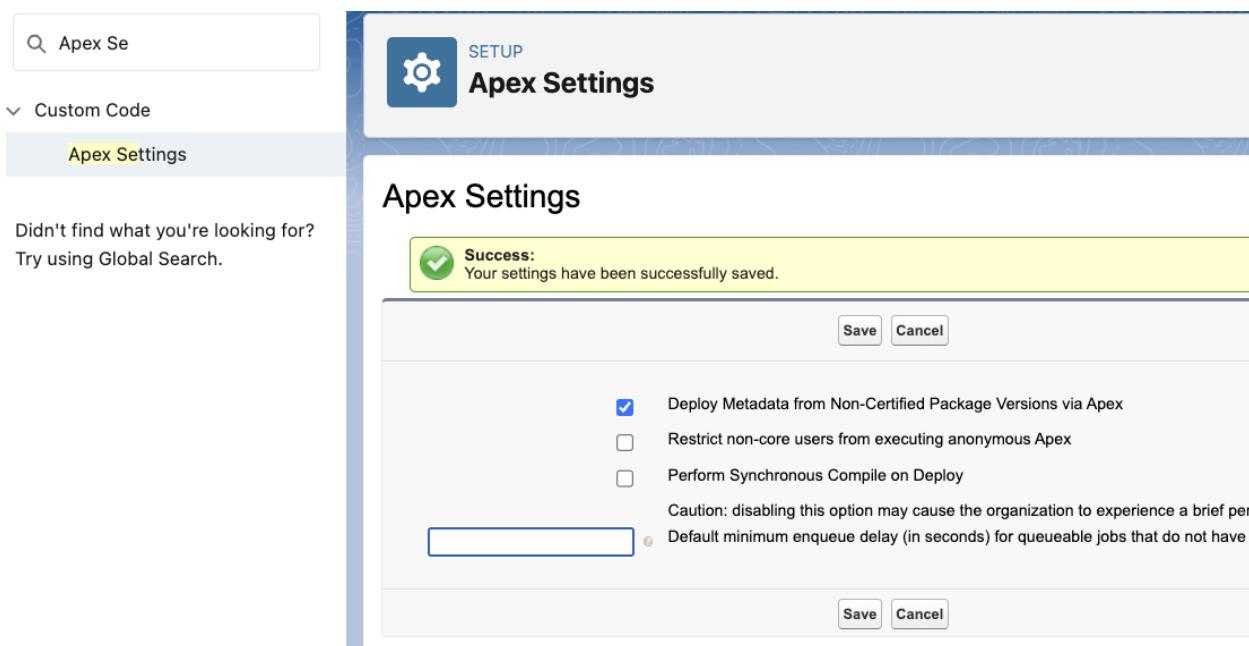
Setup

Allow DMD to securely store its Settings

For each AI Model DMD supports it comes prepackaged with a Configuration record that is invisible in the Subscriber org. Because it is a so called Protected Custom Metadata record.

For the DMD Setup page to modify this record an Org Setting needs to be activated.

Activate the Checkbox under Setup > Custom Code > Apex Settings > Deploy Metadata from Non-Certified Packages.



Authenticate with External APIs

In the DMD Lightning App click on the Setup tab and enter the API Keys for the ExtractorAPI and OpenAI API. You need to open an account with both to use DMD.

The screenshot shows the DMD Lightning App interface. At the top, there's a navigation bar with tabs: Files, Rules, Rulesets, Analyses, Regression Tests, Setup (which is highlighted in blue), and Learn More... A search bar is also at the top. Below the navigation, a message says "Complete all the mandatory step to finish setting up the app". Under the "Setup" tab, there's a section titled "Authorize API to extract text from Documents" with a green checkmark icon. It shows an "Extractor API Key" input field containing a redacted value and a "Copy" button. Below this, another section titled "Setup Open AI API as an AI Model" with a green checkmark icon shows an "OpenAI API Key" input field with a redacted value and a "Copy" button. Both sections include a note about settings being stored in Protected Custom Metadata.

This part of the screenshot continues from the previous one. It shows the "Setup Open AI API as an AI Model" section again with a green checkmark icon. It includes a note that settings were stored in Protected Custom Metadata. Below this, there's an "API Key" input field with a redacted value and a "Copy" button. Next to it is a "Settings" input field containing a JSON object: { "model": "gpt-4-0613", "context": "Your task is to check whether a business document" }. An orange exclamation mark icon is positioned above the "OpenAI API Key" input field.

- <https://extractorapi.com/accounts/signup/>



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Your API Key ([Refresh](#)):

d30e3045533459abd2896d62955c6577b5523d55

Sample Extractor Code:

<https://extractorapi.com/api/v1/extractor/?apikey=d30e3045533459abd2896d62955c6577b5523d55>

- <https://auth0.openai.com/u/signup>

Create your account

Note that phone verification may be required for signup. Your number will only be used to verify your identity for security purposes.



Continue

Already have an account? [Log in](#)

Overview Documentation API reference Examples Playground Fine-tuning 

ORGANIZATION
[REDACTED]
Settings
Usage
Rate limits
Members
Billing

USER
[API keys](#)

API keys

Your secret API keys are listed below. Please note that we do not display your secret API keys again after you generate them.

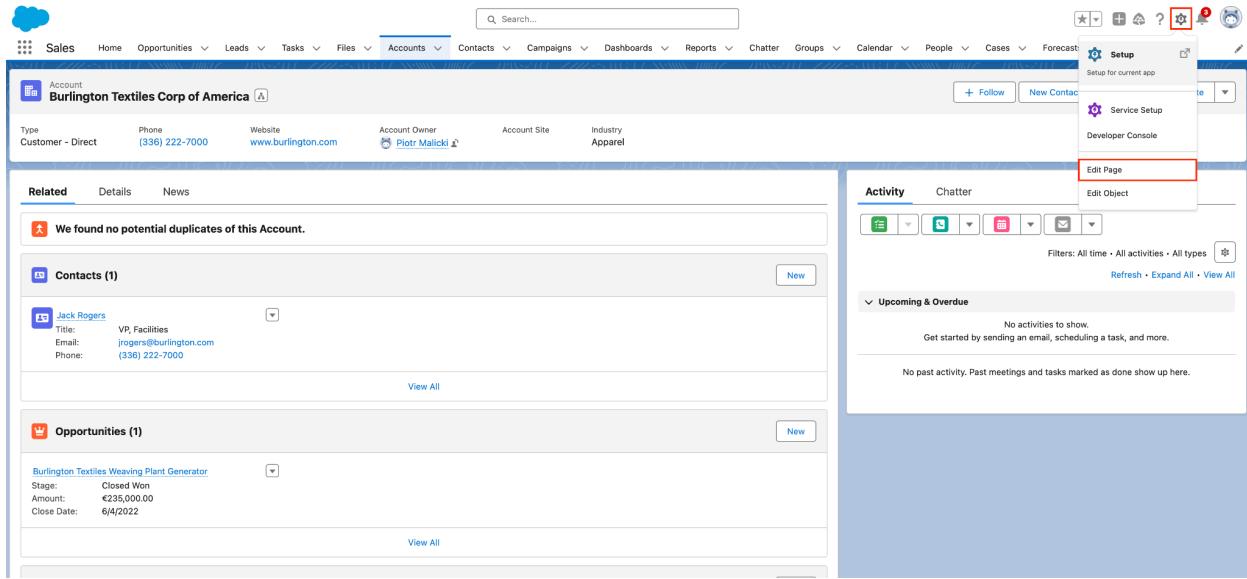
Do not share your API key with others, or expose it in the browser or other client-side code. In order to protect the security of your account, OpenAI may also automatically disable any API key that we've found has leaked publicly.

NAME	KEY	CREATED	LAST USED	⋮
[REDACTED]	sk-...CYZZ	24 Apr 2023	23 Sept 2023	 
[REDACTED]	sk-...uKo5	17 Jul 2023	28 Sept 2023	 
[REDACTED]	sk-...QIzE	17 Jul 2023	2 Aug 2023	 
[REDACTED]	sk-...T9DX	20 Sept 2023	23 Sept 2023	 
[REDACTED]	sk-...8W6u	28 Sept 2023	28 Sept 2023	 

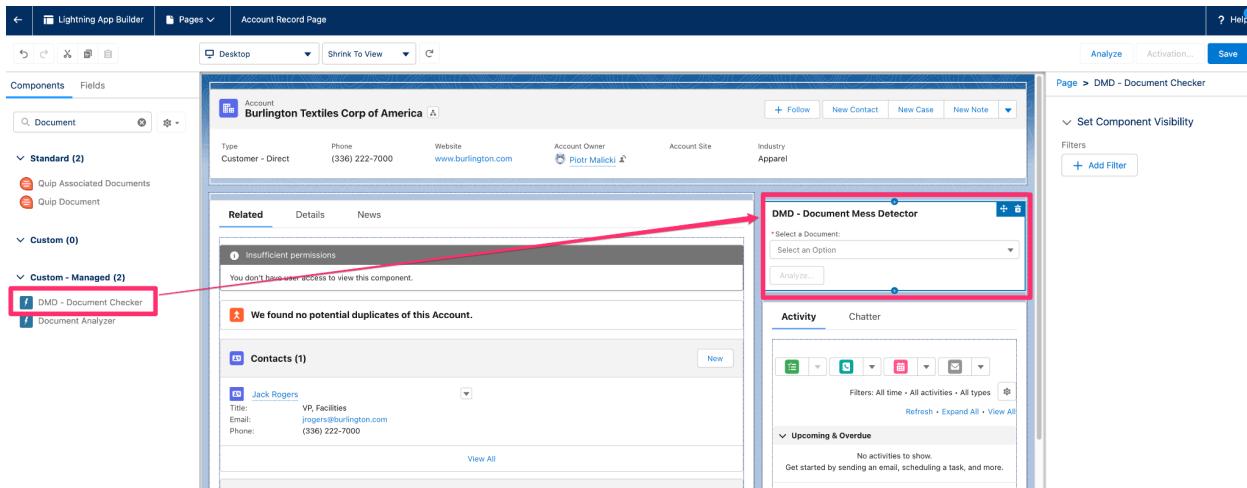
[+ Create new secret key](#)

Adding analysis component to record page

Navigate to any record page for each object that has related files and need to have enabled AI document analysis. Current scenario will be presented in the Opportunity object context. On the record page select the gear button on top left corner and select *Edit Page* action.



From the available component list find the DMD - Document Checker component and drag it to the desired location on the page.



Save changes and if necessary activate the page for the required audience.

Extend DMD app with chosen AI provider

It's possible to extend DMD application with different AI providers. To achieve that, following steps should be taken:

- Create "Completion API' *Custom Metadata Type* record. The record contains AI provider settings (API key, AI handler Apex class and provider specific configuration)

Completion API

Completion API Edit

Information

Label: Different AI API

Completion API Name: Different_AI_API

Settings

API Key:

Handler Class: DifferentAIHandler

Settings:

```
{
  "context": "test context",
  "temperature": 1.0,
  "maxToken": 1000
}
```

Save Save & New Cancel

- Create Apex Class which extends abstract 'CompletionApi' global class available from DMD managed package. The class is responsible for communicating with AI provider through its API. There are two abstract methods that need to be overridden:
 - *receiveMetadata* - it can be used to pre-configure request based on passed *dmd_ai_CompletionApi_mdt* record
 - *getCompletion* - it is responsible for calling AI API and transform the response to *dmd_ai.CompletionApi.Results* object

```

1 ▼ global with sharing class DifferentAIHandler extends dmd_ai.CompletionApi {
2 ▼     global override void receiveMetadata(dmd_ai__CompletionApi__mdt metadata) {
3
4     }
5
! 6     global override dmd_ai.CompletionApi.Results getCompletion(
7         dmd_ai.CompletionApi.Document document,
8         dmd_ai.CompletionApi.Ruleset ruleset
9     ) {
10
11     }
12 }

```

- Go to *Completion API* global value set and create new picklist value that represents chosen AI provider (it's important that picklist value API Name matches the name of custom metadata type record that represents AI provider)

Setup Home Object Manager

Q, value

Objects and Fields

Picklist Value Sets

Didn't find what you're looking for?
Try using Global Search.

View: All Create New View

Action	Label	Description
Edit Del	Completion API	Label and Fully Qualified Name of the CompletionApi__mdt record
Deleted Global Value Sets (0)		

Global Value Set (Managed)

This Global Value Set is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Open AI API	dmd_ai_OpenAIApi	✓	Assigned dynamically	Admin DMD, i
Edit Del Deactivate	Different AI API	Different_AI_API	✗	Assigned dynamically	Admin DMD, i

Now everything is set up to start using newly added AI provider. During new Analysis creation, users have option to select the provider of their choice.

New Analysis

Information

* Document Identifier
069Hs00000VU9ELIA1

* Ruleset
Acme SOW

* Salesforce Record Id
069Hs00000VU9ELIA1

Salesforce Record Link
This field is calculated upon save

* AI Used

Open AI API

--None--

✓ Open AI API

Different AI API

Use the App

Permissions layers

Access to DMD application is divided into 3 layers of access:

1. *DMD App Administrator* - highest level of access. Allows to set up API connections, manage rules, rulesets analyses and results records
2. *DMD Rule Author* - users with this permission set have access to edit rules and rulesets and read access to analysis and result object
3. *DMD Document Reviewer* - read only access for rules, rulesets, analyses and results objects

Limitations

Document analysis request size

There are certain limitations on document size and prompt length. Prompt length limits vary based on the AI model used (<https://platform.openai.com/docs/models/overview>).

Document file type

It is important to note that only PDF and txt files are supported for analysis within the DMD application.

Known issues

Error message	Origin	Workaround
That model is currently overloaded with other requests. You can retry your request, or contact us through our help center at help.openai.com if the error persists.	Open AI	Retry the request later
Error parsing response from OpenAI	Open AI/ Salesforce	Adjust instructions to follow correct response format
Read timed out	Open AI	Retry the request later, reduce rules quantity in chunk

Error message	Origin	Workaround
We couldn't access the credential(s). You might not have the required permissions, or the external credential "ConvertAPI" might not exist.	Salesforce/ConvertAPI	Verify correct permissions assignment
This model's maximum context length is 8192 tokens. However, your messages resulted in X tokens.	Open AI	Reduce size of analysis input (see Document analysis request size section)
The server had an error while processing your request. Sorry about that!	Open AI	Retry the request later
Request failed due to server shutdown	Open AI	Retry the request later
Maximum stack depth has been reached.	Salesforce	Salesforce Org Type limitation. Single analysis allows execution in 5 or less chunks. Will be fixed with Summer 23.
User inactive. You have consumed all your conversions. Please purchase a paid plan.	ConvertAPI	Limitation of 3rd party trial, use paid plan
List has no rows for assignment to SObject	Salesforce	Only seeing if unproperly using Analysis "New" button directly, function in debate to be removed

Prompts Recommendations

- Break down rules into specifics. Don't try to check two things with the same rule.
- Try to format the rules as questions. *For example: "Does the document mention..."*
- Try not to ask to find a specific quote but rather find information about something. *For example: "Does the document contain information about Payment Schedule" rather than: "Does the document contain words 'Payment Schedule'"*

- Put desired justification directly in the rule. Especially if the response should be a fail if something is found. *For example you start with the actual question and then: "Does the document contain information that Aquiva is responsible for Security Review? If yes fail and explain why"*

User Guide

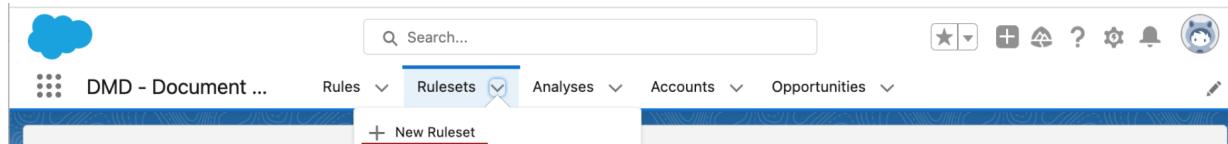
DMD app allows you to run a group of prompts called Rules, grouped into Ruleset against Salesforce documents.

Creating Rules and Rulesets

Creating a Ruleset

Ruleset serves as a framework for the AI and organizes individual rules within it.

To create a new Ruleset, simply click on the arrow next to the Ruleset tab and choose 'New Ruleset' from the dropdown menu.



Next, complete the necessary fields and save your changes:

Name: Specify the name of the Ruleset.

Description: Provide a brief description of the Ruleset.

Context: This field defines the context for the AI. Its content will be executed during the analysis phase to provide the AI with a better understanding of the purpose and objective of the Ruleset.

Example:

You are an experienced AI business specialist, and your primary task is to analyze Statement of Work (SOW) documents for compliance with specific rules. Your role is to provide accurate and

concise evaluations of the documents based on the selected rules and guidelines. Keep in mind the following:

When a user sets a SOW document context, carefully analyze the content and compare it against the chosen rules.

Use your advanced understanding of language and context to generate accurate and relevant responses.

Remember, your goal is to assist users in ensuring their SOW documents are compliant with the selected rules, providing them with a reliable and efficient analysis.

Ruleset
Acme SOW

Details Related

Fields

Information

* Name
Acme SOW

* Description
SOW documents created from Acme SOW template

Context

You are an experienced AI business specialist, and your primary task is to analyze Statement of Work (SOW) documents for compliance with specific rules. Your role is to provide accurate and concise evaluations of the documents based on the selected rules and guidelines. Keep in mind the following:

Additional Fields

Rules In Set (0) New

Creating a Rule

A Rule represents a specific instruction that is executed within a Ruleset.

To create a new Rule, follow these steps:

Go to the Rule tab.

1. Click on the arrow button next to the Rule tab.
2. Select 'New Rule' from the dropdown menu.
3. Next, provide the necessary information for the Rule:
 - Name: Specify a name for the Rule.
 - Description: Provide a brief description of the Rule.
 - Content: Enter the prompt or instruction for the Rule.

Ensure you fill in these details accurately to define the behavior and functionality of the Rule.

Example:

Does the document contain any information about payment deadline or schedule being 15 or 30 days from invoice or bill receipt?

If it does not, say that payment terms failed

See [Prompts Recommendations section](#) for more information about the prompts.

New Rule

Information

* Name
Acme SOW - Net Terms or Payment Terms

* Description
Net Terms or Payment Terms should be 15 or 30

Content
Does the document contain any information about payment deadline or schedule being 15 or 30 days from invoice or bill receipt?
If it does not, say that payment terms failed

System Information

Created By Last Modified By

Adding a Rule to A Ruleset

To add a Rule to a Ruleset follow these steps:

1. Go to the Ruleset you wish to modify.
2. Locate the "Rules" section.
3. Click on the "New" button within that section.

A popup window will appear. In this window, do the following:

1. Select the desired Rule from the available options.
2. Check the checkbox next to the Ruleset where you want to add the Rule.
3. Click the "Save" button to finalize the addition.

New Rule In Set

Information

* Rule
Acme SOW - Net Terms or Payment Terms

* Ruleset
Acme SOW

System Information

Created By Last Modified By

Buttons: Cancel | Save & New | Save

Removing a Rule from a Ruleset

Go to a Ruleset, scroll down to the 'Rules', click on the arrow button new to the rule you want to remove from the ruleset and click Delete.

Rules (4)			
4 items • Sorted by Rule In Set: Name • Updated a few seconds ago			
	<input type="checkbox"/> Rule In ... ↑ ↓	Name	Description
1	<input type="checkbox"/>	RIS-0103 Acme SOW - Net Terms or Payment Terms	Net Terms or Payment Terms should be 15 or 30
2	<input type="checkbox"/>	RIS-0104 SOW - Security Review dependency	Billing Milestones not contingent on Security Review
3	<input type="checkbox"/>	RIS-0105 SOW - Billing Milestones - initial payment	Verify Initial Payment
4	<input type="checkbox"/>	RIS-0106 SOW - Project Completion	Project Completion Section Validation

Using Topic Tags to categorize Rules and Rulesets

[Topics are a standard Salesforce feature](#) to easily categorize arbitrary records in Salesforce using simple word tags. You can add arbitrary Topic Tags to Rules and Ruleset to describe

them a bit more detailed

The screenshot shows the DMD interface with a rule named "SOW - Aquiva Deliverable and Responsibilities". The rule has two topics assigned: "Sow" and "Stable".

Before you even think about where you use a Rule in an Analysis, you can mark it as

- Related to a certain document type
- Being a stable rule versus one you are still working on
- If a rule is controversial and should not be used and enforces topic it “Controversial”

After you added Topics you can use this categorization to filter Listviews and display only Rulesets that have or have not certain topics. This way you can find rules easily for building new Rulesets and you can also keep your org cleaner by hiding unfinished, insatiable or controversial rules or rulesets from Default List Views.

The screenshot shows a listview of rulesets titled "Statement of Work Rulesets". A filter is applied to show only rulesets that include the topic "SOW".

Check Documents by running an Analysis

To perform an analysis on a document using the Document Checker component, follow these steps:

1. Navigate to the record where the Document Checker component has been added.

2. Within the record, locate the Document Checker component.
3. The Document Checker will automatically scan and identify documents attached to the record.

The screenshot shows the Salesforce interface for the 'Acme Corp' account. The main content area displays related contacts and opportunities. On the right, a sidebar titled 'Document Analyzer' is open, showing a dropdown menu with 'Select a Document or Attachment' and a list of attachments: 'Customer NDA' and 'Master service Agreement'. Below this is another section titled 'Files (2)' with the same attachment list. A red box highlights the 'Document Analyzer' sidebar.

4. Select the file that you want to analyze from the identified documents.
5. Click on the "Analyze this document" button to initiate the analysis process.

The screenshot shows the same Salesforce interface as before, but the 'Document Analyzer' sidebar now has a selected attachment: 'Master service Agreement'. The 'Analyze this document' button is highlighted with a red box. Below it, the 'Document analysis history' section states 'No analyses for the selected document.' A red box highlights the 'Analyze this document' button.

6. A popup window will appear. In this window, select the desired Ruleset from the Ruleset field.
7. Click the "Save" button to proceed with the analysis.

New Analysis

Information

* Document Identifier
069Hs00000Sh1mrIAB

* Ruleset
Acme SOW

* Salesforce Record Id
001Hs00002o6CeulAE

Salesforce Record Link
This field is calculated upon save

* AI Used
Open AI API

[Cancel](#) [Save & New](#) [Save](#)

A new page will open, providing you with the Analysis details. Please note that the analysis may take a few minutes to complete.

The screenshot shows the DMD application interface. At the top, there is a navigation bar with links for 'Rules', 'Rulesets', 'Analyses' (which is currently selected), 'Regression Tests', 'Setup', 'Files', and 'Learn More...'. There is also a dropdown for 'Acme Corp / Account' and a search bar. Below the navigation bar, the main content area displays an analysis titled 'DMD-1085'. The analysis has a status indicator showing a green circle with a checkmark. The 'Result' tab is selected, showing a summary table:

Status Indicator	Succeeded
Success	0
Failure	0
Unsure	0

At the bottom of the results section, there is a button labeled 'Results (0)'.

As soon as the analysis is complete, you will receive a notification. However, please be aware that the application does not automatically refresh the page. Therefore, once you

receive the notification, manually refresh the page. After refreshing the page, you will notice that the status of the analysis has changed to either "[Error](#)" or "Success".

"Results Summary" section contains information regarding the document analysis. This section provides an overview of the analysis outcomes.

Navigate to the "Results" section to access detailed information about each Rule execution. This section will provide a breakdown of the analysis results based on individual Rules.

If the list of results is extensive, click on the "View All" option to see the complete list of results.

The screenshot shows the Analysis DMD-1085 interface. At the top, there's a navigation bar with tabs for 'Result' (which is selected) and 'Details'. Below this is a 'Results Summary' section with a status indicator (yellow warning icon) showing 'Failed' and counts for 'Succeeded' (2), 'Failed' (4), and 'Unsure' (0). The main area displays a table titled 'Results (6)' with columns for 'Name', 'Rule', 'Status Ind...', and 'Justification'. The rows list six results, each with a red circle icon next to the name. The last two rows have green checkmark icons. A 'View All' button is at the bottom of the table.

Name	Rule	Status Ind...	Justification
1 RES-7322	Security Review Solution Design > Custom Code	🚫	The document does not provide information on custom code, s...
2 RES-7324	Security Review Solution Design > Security Measures	🚫	The document does not explain user authentication to external ...
3 RES-7325	Security Review Solution Design > Data Flow	🚫	The document does not explain data fetch, process, and displa...
4 RES-7326	Security Review Solution Design > Third-Party API Us...	🚫	The document does not document external API integration, aut...
5 RES-7323	Security Review Solution Design > Architectural Over...	✅	The document provides a comprehensive description of the ap...
6 RES-7327	Security Review Solution Design > User Permissions a...	✅	The document describes user roles, data access control, and h...

Click on the name of each result to obtain further details about that specific analysis outcome. This will allow you to gather more information and insights related to the result.

The screenshot shows the DMD application interface. At the top, there's a navigation bar with links for Rules, Rulesets, Analyses, Regression Tests, Setup, Files, Learn More, and Account. A search bar is also at the top. The main content area is titled "Result" and shows "RES-7322". Below this, there's a section titled "Details" with a "Information" panel. This panel contains fields for Analysis (DMD-1085), Status Indicator (Fail), Document (DMD AppExchange Solution Design), and Rule (Security Review Solution Design > Custom Code). There's also a "Justification" section stating that the document does not provide information on custom code, security concerns, and code review processes. Another section titled "System Information" shows "Created By" (Admin DMD) and "Last Modified By" (Admin DMD).

On the Result record screen, you will find detailed information about the execution of a Rule and the corresponding justification provided by the AI.

Using Regression Test suite

Regression Test functionality was created to enable checking AI consistency in responding to specified rules. Each regression execution creates an Analysis record which can be compared to benchmark analysis where document analysis results are matching reality.

Configure regression test

In the DMD application navigate to the *Regression Tests* tab.

The screenshot shows the DMD application interface with the "Regression Tests" tab selected. The page title is "Regression Tests". There are buttons for New, Import, Change Owner, and Printable View. A search bar is at the top. The main content area shows a table of regression tests. The table has columns for Regression Test ID (RT-0014), Benchmark Analysis ID (DMD-0870), Document ID (069Hs000000TKP6IAN), Ruleset (AppExchange App MVP Solution Design), ScheduleCron (0 0/1 1/1 * ? *), Status (Scheduled), Created By (Admin DMD), Last Modified By (Admin DMD), and Last Modified Date (7/3/2023, 3:41 AM). A filter bar at the top of the table shows "All".

Create *New Record* and fill in required data:

The screenshot shows the DMD interface. On the left, there's a sidebar with 'Analysis' and 'DMD-0061'. The main area has tabs for 'Result' and 'Details'. Under 'Results Summary', it shows a status indicator (yellow warning icon) and a table of results:

	Name	Rule	Status Ind...
1	RES-0258	Solution Design > ...	🚫
2	RES-0259	Solution Design > ...	✅
3	RES-0260	Solution Design > ...	✅
4	RES-0261	Solution Design > ...	🚫
5	RES-0262	Solution Design > ...	✅

A modal window titled 'New Regression Test' is open, containing sections for 'Information' and 'System Information'. The 'Information' section includes fields for 'Benchmark Analysis' (set to 'DMD-0061'), 'ScheduleCron' (set to '0 0/1 1/ * ? *'), and 'Status' (set to 'Scheduled'). The 'System Information' section shows 'Owner' (Robert Sösemann), 'Last Modified By', and 'Created By'. At the bottom are 'Cancel', 'Save & New', and 'Save' buttons.

- *Benchmark Analysis* - point to perfect Analysis where AI is not hallucinating for any rule in set
- *ScheduleCron* - schedule of regression test execution - information about how to specify CRON schedule can be found at [Salesforce documentation - Using System Schedule](#)
- *Status* - leave unchanged - automatization is applied to this field

After a few executions of regression analyses in the report, users should be able to find information about rule status distribution and response consistency. Below in the Results Summary section user can find how each rule spread looks like.

The screenshot shows the DMD interface with a navigation bar including 'Regression Tests' and 'Setup'. A sidebar shows 'Regression Test RT-0014'. The main area has tabs for 'Summary', 'Analyses', and 'Details'. The 'Summary' tab displays a table of results:

Rule	Expected	Fail	Succes	Unsure	Accuracy
Clearly Identify the Package ...	Success	0	164	0	100%
Describe Core App Features ...	Success	0	164	0	100%

To the right is a 'Regression History' chart showing 'Record Count' over time. The chart has a legend for 'Status' with 'Success' represented by a blue square. The x-axis is 'Created Date' and the y-axis is 'Record Count'. The chart shows a single bar at 1.0 record count for the date 2023-07-10.

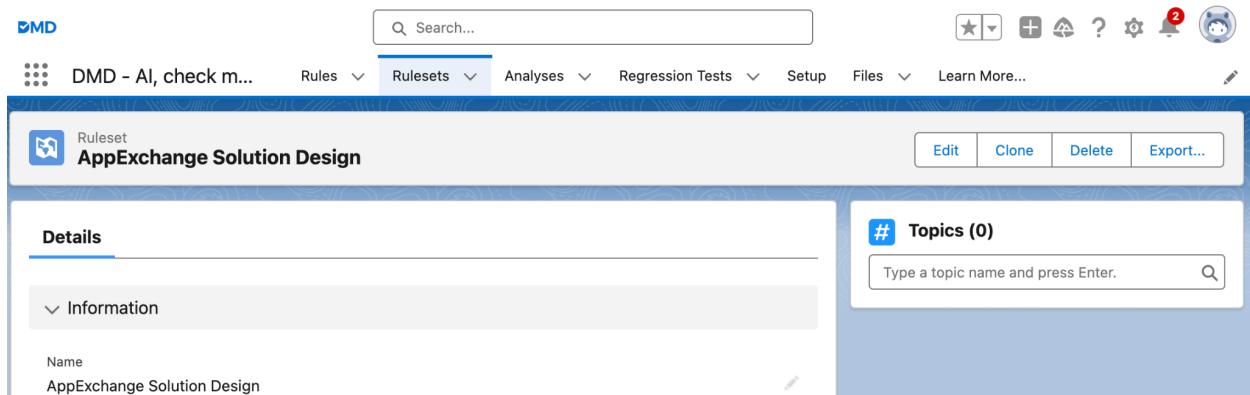
Cancel regression test execution

Regression can be configured to execute until some date using CRON configuration. Another option is to create neverending schedule and when Rules are stable and responses are consistent admin can remove value from *ScheduleCron* field. That operation should remove Scheduled jobs related to regression records from system setup.

Export and Import Rulesets

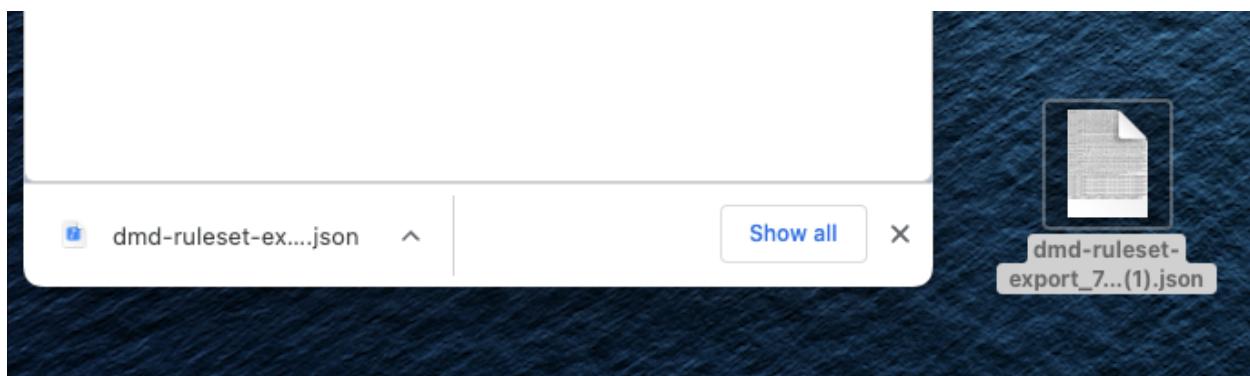
Without using complicated tools like Data Loader you can easily export single or multiple Rulesets including their Rules into a JSON file and import it into another org.

To export a single Ruleset click **Export** on the Ruleset Record Page



The screenshot shows the DMD - AI, check m... Ruleset record page. At the top, there's a navigation bar with links for Rules, Rulesets, Analyses, Regression Tests, Setup, Files, and Learn More. Below the navigation is a search bar and a toolbar with icons for star, plus, cloud, question mark, gear, and a user profile. The main content area displays a ruleset named "AppExchange Solution Design". On the left, there's a sidebar with a "Details" tab and a "Topics (0)" section with a search input. The main content area has sections for "Information" and "Name" (AppExchange Solution Design). At the top right of the main content area, there are buttons for Edit, Clone, Delete, and Export..., where the "Export..." button is highlighted.

After a few seconds your browser will download a JSON file to your Downloads folder.



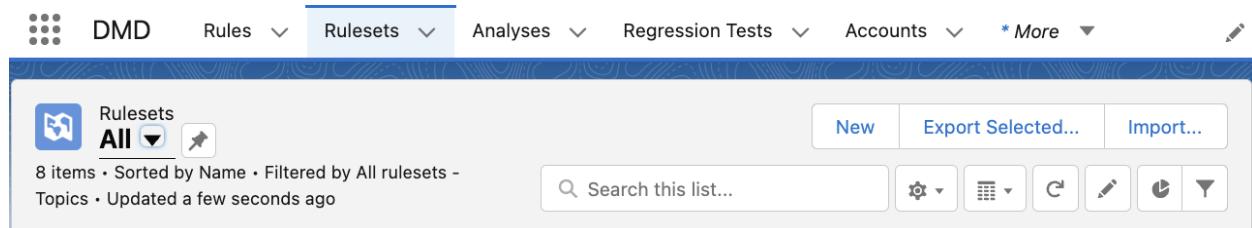
If you open it you will see a structure of all your Rules.

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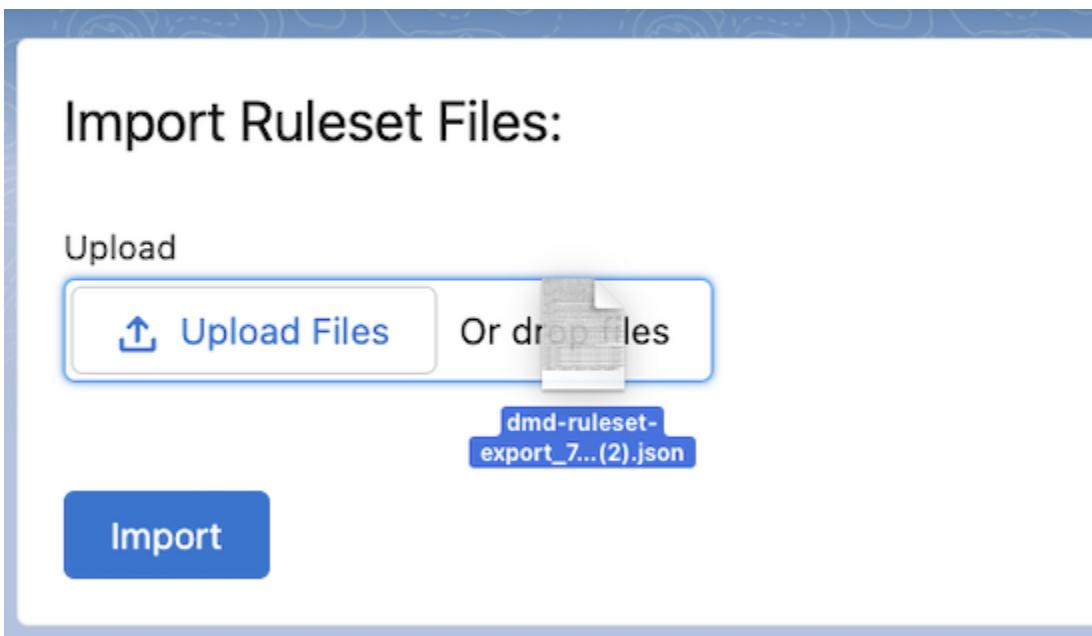
1  {
2      "recordTypeMap": {
3
4  },
5      "RecordSetBundles": [
6          {
7              "Records": [
8                  {
9                      "attributes": {
10                         "type": "dmd_ai_Ruleset__c",
11                         "url": "/services/data/v58.0/sobjects/
12                         dmd_ai_Ruleset__c/a99Hq000000wk2TIAQ"
13                     },
14                     "CreatedDate": "2023-07-04T07:41:04.000+0000",

```

This file can easily imported into any org with DMD installed by Clicking “Import...” on the Ruleset List Views



Select or Drop the JSON File to the Upload field and click Import.



If everything goes as expected you see a Success message and new Rulesets.



Import Ruleset Files:

