**What is Prompt Builder?**

* **Prompt Builder** is a **low-code Salesforce tool** used to:
* **Create, test, and manage prompt templates**.
* Integrate **Generative AI** into Salesforce business processes.
* Use CRM data dynamically to personalize AI-generated content.
* It is mainly used by **Salesforce Admins** to guide large language models (LLMs) like Einstein GPT.

**What is a Prompt?**

* A **prompt** is a **specific instruction or input** given to an **AI model** to generate a desired response.
* The response could be **text, image, code**, etc.
* ✅ **Example**: Asking ChatGPT: “Write an email to welcome a customer.”  
  → This instruction is the **prompt**.

**What is a Prompt Template?**

* A **Prompt Template** is a **reusable prompt structure** used in **Salesforce** to generate personalized AI responses.
* It’s similar to an **email template** that includes **merge fields** (placeholders like {{CustomerName}}).
* At **runtime**, these placeholders are filled with **CRM data** (like customer details, product info, etc.).
* This final output becomes a **fully formed prompt**, which is then sent to the **large language model** (e.g., GPT or Einstein).

**Types of Prompt Templates**

1. Sales Email Prompt Template.
2. Field Generation Prompt Template
3. Record Summary Prompt Template
4. Flex Prompt Template

**What is a Field Generation Prompt Template?**

* It’s a **template that uses AI to auto-populate fields** (like summaries or descriptions) in Salesforce.
* Saves time by generating content from available data rather than typing manually.

**What Is a Sales Email Prompt Template?**

A **Sales Email Prompt Template** in Salesforce Prompt Builder allows agents to **generate personalized, AI-written emails** using CRM data (like Cases, Contacts, Leads) — without manually composing emails.

**Record Summary Prompt Template**

* A **Record Summary Prompt Template** generates a **concise, AI-generated summary** of key fields on a record (like a Case, Opportunity, or Account).
* It helps users **quickly understand** the most critical information without reviewing dozens of fields manually.

**Flex vs Field Generation vs Record Summary**

* **Field Generation** → populate a *single field* on a record (button/flow runs, user reviews/accepts). Typical: write Product Description.
* **Record Summary** → auto-summarize one record’s key info (used by “Summarize Record” actions/Copilot).
* **Flex** → free-form, multi-purpose content; you define inputs/resources (merge fields, flows, Apex, etc.). Great for newsletters, PDFs, posts—**and can take up to five inputs**.

Flex templates can be invoked from custom UI, Flow, Copilot actions, or via API.

**Permission Sets**

* “*Agent needs to use existing prompts in Service Console”* → **Prompt Template User**
* *“Admin must design, edit, and activate new prompts”* → **Prompt Template Manager**
* *“Sales rep wants to generate AI-powered prospecting emails”* → **Einstein Sales Email**