

RAG in Salesforce

Live Implementation with Agentforce



*Learn by
doing it!*

SFB^{LT}



Live Implementations

Data Cloud

Crash Course : A Developer's Perspective



*Learn by
doing it!*

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LIGHTNING WEB COMPONENTS

Crash Course : A Developer's Perspective

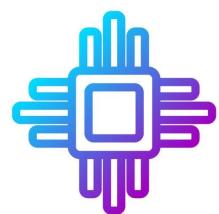
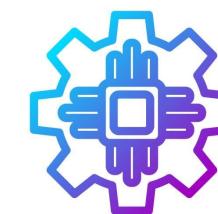


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Available on YouTube for FREE

“Salesforce Bolt”

- Overview
- What is RAG
- Demo Scenario
- How It Works: RAG in the Background
- Live Project





Overview

In our previous crash course, we explored how Salesforce **Data Cloud** unified data from Rideswift Rental and Adventure Cloud, helping the company create a single customer view.

Now, we're taking it a step further.

Adventure Cloud - a unified brand offering both vehicle rentals and adventure experiences. As the company grows, so does the complexity of its policies - vehicle insurance, personal insurance, booking, cancellation, and more.

The challenge?

Employees and customers often struggle to find these policies quickly across multiple PDF documents.

That's where **RAG (Retrieval-Augmented Generation)** in Salesforce **Agentforce** comes in.



What is RAG

RAG stands for **Retrieval-Augmented Generation** - a framework that helps AI systems generate accurate and context-aware responses by retrieving information from your own data structured or unstructured (like PDFs, text, or knowledge articles).

In simple terms:

Instead of guessing, your Agent reads your company's real documents to answer questions.

When users ask about insurance coverage or cancellation rules, the agent fetches the relevant sections from your uploaded PDFs, HTML, Text and crafts an answer grounded in that context.



Scenario

Company: Go Adventure

Use Case: A single intelligent Policy Assistant that can instantly answer questions related to:

- Vehicle insurance
- Personal insurance for adventure trips
- Booking and cancellation policies
- Safety and refund guidelines

Goal:

Empower customers and employees to find policy answers instantly - no searching through files, no outdated information.



