Agentforce for Financial Services

Prompt Builder & Agentforce Hands-On Workshop

Retail Banking and Wealth Management

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BCP

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Workbook Overview

Workbook Purpose

Welcome to our introductory workshop on using Salesforce's new **Prompt Builder & Agentforce** features. This workbook contains detailed instructions for you to follow along with your host as they walk you through hands-on exercises to solve and address real-life requirements.

We will walk through how to:

- Leverage **Prompt Builder** to automatically create dynamic prompts that can be sent to large language models (LLMs)
- Navigate and use standard and custom **Agent** actions

By the end of this session, you'll be able to:

- **Set up and Configure**: Learn how to effectively set up Prompt Builder and Agents, including their configuration
- **Build, Customize and Deploy Prompts in Prompt Builder**: Understand how to use fields, flows, and LLM features while applying prompt engineering best practices to create prompts
- **Develop & Deploy Actions in Agents**: Learn the process of creating agent actions, focusing on the steps to build, test, and refine topics and instructions that are used by Agentforce

Setting the Stage: Scenario & Background

You are a Salesforce Administrator working for Cumulus Financial, a premier financial services institution that provides a wide variety of services to clients such as retail banking, wealth management, commercial banking, insurance, and asset management. You've recently gotten access to Salesforce's newest generative AI tools and would like to understand how these can help improve productivity for your various lines of business.

The developer orgs provided to you come pre-configured with the following:

- **Financial Services Cloud**: Our flagship Industries solution. purpose-built for financial services organizations
- **Agentforce Studio**: Our latest generative AI innovations, including Prompt Builder and Agent Builder
- **Data**: Some sample data has been preloaded to mimic real-world use cases
- **Configurations**: Flows, automations and generative AI features

IMPORTANT NOTE: These developer orgs provided to you will expire approximately 10 days after the workshop date

Useful Terminology

From the Generative AI Glossary for Business Leaders, a few important terms to know for this demo lab are:

1. **Hallucination:** A hallucination happens when generative AI analyzes the content we give it, but comes to an erroneous conclusion and produces new content that doesn't correspond to reality or its training data. An example would be an AI model that's been trained on thousands of photos of animals. When asked to generate a new image of an "animal," it might combine the head of a giraffe with the trunk of an elephant. While they can be interesting, hallucinations are undesirable outcomes and indicate a problem in the generative model's outputs.
   a. What it means for customers: When companies monitor for and address this issue in their software, the customer experience is better and more reliable.
   b. What it means for teams: Quality assurance will still be an important part of an AI team. Monitoring for and addressing hallucinations helps ensure the accuracy and reliability of AI systems.

2. **Prompt engineering:** Prompt engineering means figuring out how to ask a question to get exactly the answer you need from a Large Language Model. It's carefully crafting or choosing the input (prompt) to get the best possible output.
   a. What it means for customers: When your generative AI tool gets a strong prompt, it's able to deliver a strong output. The stronger, more relevant the prompt, the better the end user experience.
   b. What it means for teams: Can be used to ask a large language model to generate a personalized email to a customer, or to analyze customer feedback and extract key insights.

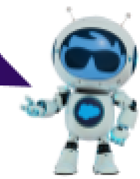
3. **Retrieval Augmented Generation (RAG):** RAG combines real-time information retrieval with generative AI, allowing systems to pull in relevant, up-to-date data. This ensures responses are informed by both pre-existing knowledge and current, context-specific information, making it ideal for scenarios requiring accurate and personalized interactions.
   a. What it means for customers: Provides more accurate, personalized responses by drawing on the most relevant and up-to-date information, leading to higher trust and better overall interactions.
   b. What it means for teams: Enhances AI by enabling real-time, dynamic responses without frequent retraining. It streamlines data use, promotes cross-department collaboration, and provides a competitive edge by delivering more intelligent and tailored customer experiences.

4. **Vector Database:** A vector database is a specialized type of database designed to store and manage high-dimensional vector representations of data, often referred to as *embeddings*. Unlike traditional databases that handle structured data with predefined schemas, vector databases are optimized for storing and searching large volumes of unstructured or semi-structured data, such as text, images, or audio, which have been transformed into numerical vectors. These vectors capture the essential features and relationships of the data and are particularly well-suited for similarity search tasks. They typically employ advanced indexing techniques, such as Approximate Nearest Neighbor (ANN) algorithms, to ensure fast and scalable search operations across large datasets.
    a. What it means for customers**:** Customers benefit from more accurate and personalized recommendations or responses, improving their overall experience with faster and more relevant results.
    b. What it means for teams: Teams can efficiently manage and retrieve large volumes of complex data, enhancing AI performance and scalability for delivering smarter, more responsive solutions.

5. **Embeddings:** Embeddings in a vector database are numerical representations of data, like text or images. These embeddings are created by machine learning models that transform the original data into vectors, where similar items are positioned close to each other. In a vector database, these embeddings are stored and organized so that similar data can be quickly found based on how close their embeddings are. This approach is useful for tasks like recommending products, understanding text, or recognizing images, where it's important to find and compare similar items efficiently.
    a. What it means for customers**:** Word embeddings allow customers to receive more accurate, contextually relevant recommendations or search results by understanding the meaning and relationships between words.
    b. What it means for teams: Word embeddings help teams efficiently process and analyze text data, enabling AI systems to identify similarities and patterns, improving tasks like search, recommendations, and natural language understanding.

6. **Retriever:** The retriever searches through a collection of documents, embeddings, or other forms of data to find the most relevant information based on a given query or prompt. This information is then passed to the generator (typically a language model like GPT) to produce a more accurate, informed, and contextually relevant response. The retriever helps ensure that the generative model is grounded in up-to-date or specific details that it might not have been trained on, making the overall RAG system more powerful and contextually aware than a standard generative model on its own.
    a. What it means for customers**:** The retriever ensures customers receive more accurate, contextually relevant responses by pulling in the most relevant information for their queries.
    b. What it means for teams: For teams, the retriever enables efficient searching and retrieval of the most pertinent data, improving the accuracy and relevance of AI-generated responses.

Pause: Were there any new terms or acronyms that you haven't heard of? Be sure to jot those down!



Guidance & Best Practices for Topics & Actions

Agent Topics

Topics help define the capabilities of an Agent and serve as a container for instructions and actions. They enable Agents to use relevant instructions and actions for a given point in a conversation. Another way to think of it is that Topics are a “Job To Be Done.” As a builder, Topics provide a mechanism to define and configure the scope of what an Agent can handle.

Topic Instructions

Instructions are “prompts,” written in natural language, that guide the Agent on how to best use the actions to perform the job within its Topic scope. Instructions are mapped to a Topic and are configurable to provide more granular control over the Agent.

Here are some guidelines for Instructions:

- **Determinism:** Instructions are non-deterministic and do not replace the need for coded business rules within the action. "Non-deterministic" means that something can have different outcomes even if you start with the same conditions. It's like flipping a coin; you don't know if it will be heads or tails each time you flip it, even though you always start with the same coin.
- **Use context:** To get the best results, instructions should be clear, detailed, and direct. It is recommended that you provide context based on the nature of the task you want the instruction to handle.
- **Provide examples:** To help the Agent better understand what you're asking for, provide examples or sample inputs and outputs.
- **Avoid ambiguity:** Be as specific as possible when providing instructions. Avoid ambiguous language that can lead to misinterpretation.

As you build Topics, a good mental model is to **define instructions last.** Build out the required Topic fields (name, description, scope) and add associated actions, then begin testing the Topic. Incrementally add instructions to guide your Agent to execute the Topic and select actions in the desired manner in an iterative build+test loop.

Topic Name

- **Definition:** A term that categorizes the jobs to be done within the Topic.
  - For example, if your Topic has multiple actions such as get_beneficiaries, add_beneficiaries, or remove_beneficiaries, a potential name for that Topic can be "Manage Beneficiaries."
- When considering a Topic Name in a group of Topics, ensure there is enough semantic distance so it is clear and separate enough from other Topics.
- **Customization:** Topic names can be editable by the builder.

Topic Classification Description

- **Definition:** A plain text sentence that will guide the LLM Topic classifier on when to select this Topic.
- Used to classify the current Topic at each turn of conversation, and most effective when it closely mirrors the types of inquiries expected to "trigger" this Topic.
- **Customization:** Topic descriptions can be editable by the builder.

Topic Scope

- **Definition:** The scope is used to determine what Agent can do once the conversation is switched to the current Topic, and helps to constrain Agent to not attempt to respond outside the desired job or "scope" you want this Topic to include.
- This does not get sent to the Topic classifier, but is included along with actions in the prompt Agent uses to react and reply to customers.
- Used to guide exactly what Agent can and cannot do for a given Topic ("your job is only to…"), and most effective when it narrowly defines Agent's job for a given Topic.
- **Customization:** Topic scopes can be editable by the builder.

Topic Instruction Definition

- **Definition:** Plain text sentences to guide the LLM on how to best use the tools and perform the Topic's job.
- **Examples:**
  - "If a user does not get information, ask if they'd like to escalate to an agent or create a case."
  - "Ask open-ended questions of the user(s) to gain insight and clarity."
  - "Always offer both options to look up an order by either email address or order ID."
  - "When searching the knowledge articles, include the model of the vacuum sealer in the search query."
- **Customization:** Instruction Definitions will be editable by the builder.

Agent Actions

Actions are the tools to do the job. Actions are added to Topics to limit Agents to only use the relevant tools for a given job-to-be-done. For more information, refer to Best Practices for Instructions.

Action Label:

- **Definition:** The label/name of the Agent action.
- **Customization**: The label of the Agent action can be editable by the builder.

Action Instructions:

- **Definition:** Action instructions describe what your action does and when to use it in a conversation. Instructions should be written in a descriptive manner and fit within the use case in the associated Topic.
- **Customization**: Instructions can be editable by the builder.

Action Inputs:

- **Definition:** Inputs allow users to pass in values to successfully call the action.
- Input names and input descriptions should be human readable and written to support the Standard Topic use case.
- In order for an Agent to ask for the data needed, the inputs need to be marked as required.
- **Customization**: Input names, descriptions and Agent action toggles (Require Input, Collect Data from user)

Action Outputs:

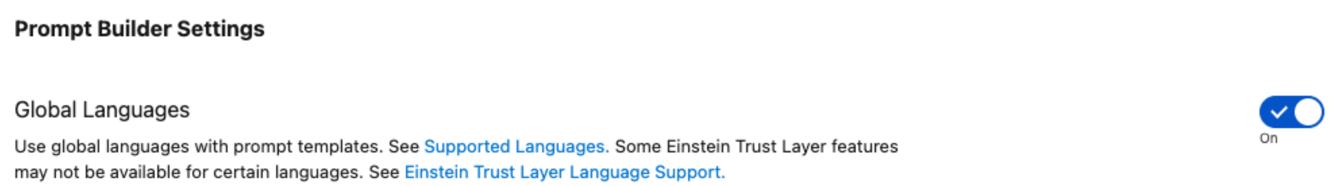
- **Definition:** Output names and descriptions should be representative of how they are used to support the Standard Topic.
- **Customization**: Output names, descriptions, and all Agent action toggles (Require Input, Collect Data from user)

Developer Org Prep

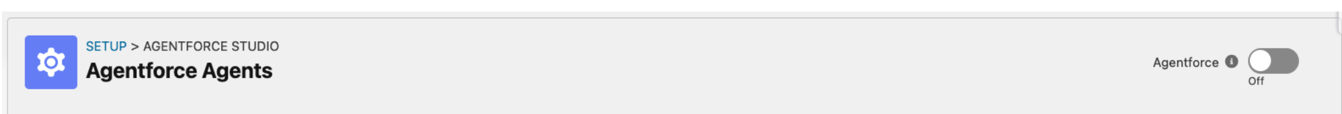
To be successful in this session, you will need to first complete a few steps to prepare your demo environment.

Part 1: Enable the Einstein Features

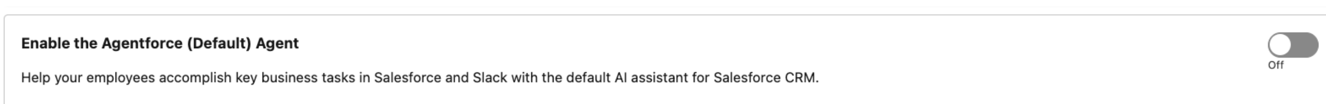
1. Click the **Setup** icon in the top right and select **Setup**. A new tab will open.
2. On the new tab, in the Quick Find box at the top left, enter **Einstein Setup** to find and select the Einstein Setup page. On it, click the toggle to **Turn on Einstein** and **Turn on Global Languages** (it might be already turned on)



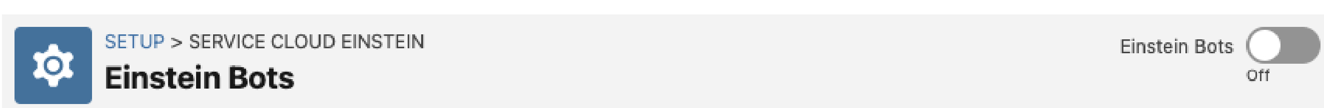
3. Refresh the browser and in the Quick Find box, search for and select **Agentforce Agents**. At the top of the page, toggle on **Agentforce**.



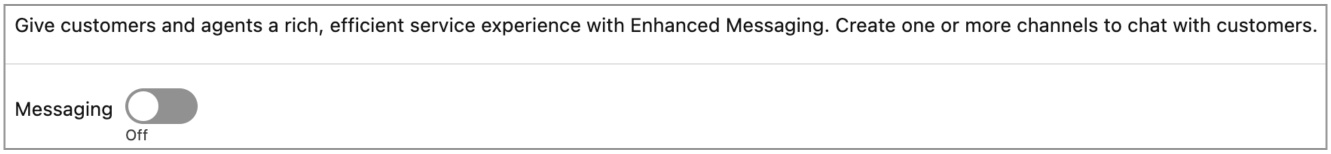
4. In the middle of the page, toggle on **Agentforce (Default) Agent**



5. In the Quick Find box, search for and select **Einstein Bots**. Toggle on **Einstein Bots**



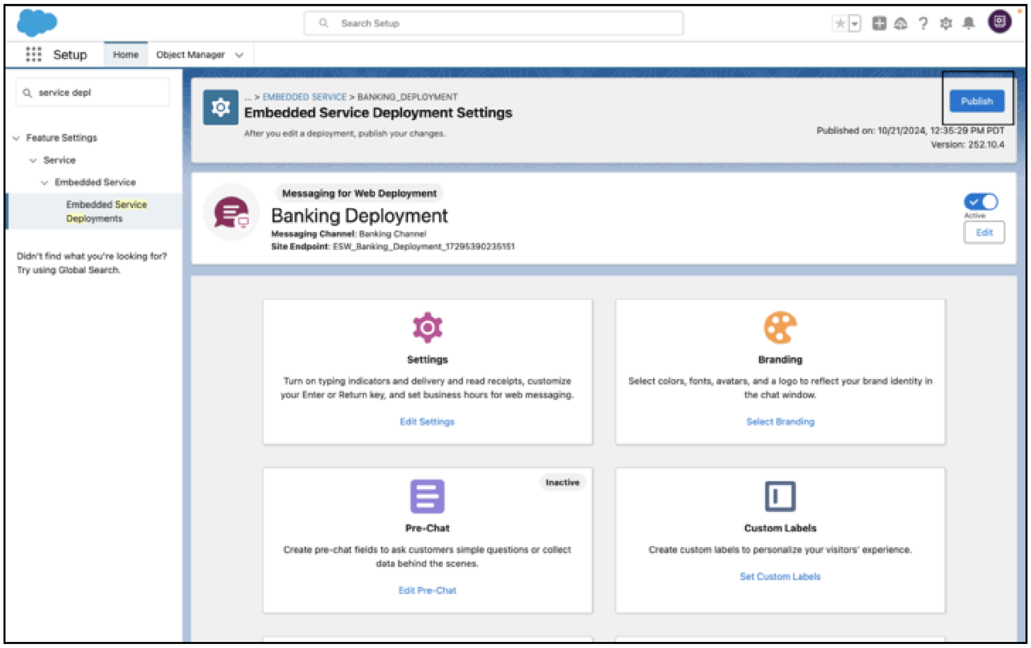
6. In the Quick Find box, search for and select **Messaging Settings**. Toggle on **Messaging**



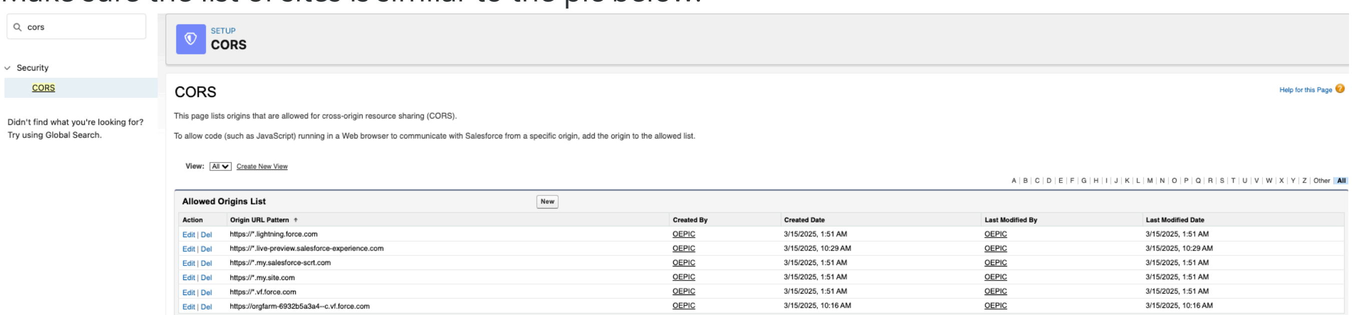
7. Ir a **SETUP > Domains** y anotar el Domain Name del **Experience Cloud Site Domain** (por ejemplo: orgfarm-c6a08b5737.my.site.com)
8. In the Quick Find box, search for and select **Embedded Service Deployments**
   a. Click [New Deployment] on the right
   b. In the pop-up, select **Enhanced Chat** and click **Next** *If you cannot select 'Messaging for In-App and Web', close the pop-up by clicking the X at the top right of it. You may have opened the pop-up multiple times.*
   c. Select **Web** and click **Next**
   d. Fill the form using the table below and click **Save**. It can take a few minutes to save.

Field	Value	Explanation
Embedded Service Deployment Name	Banking Deployment	The name of our embedded services deployment
API Name	Banking_Deployment	This will be automatically filled after providing the Embedded Service Deployment Name
Domain	El **Experience Cloud Site Domain** anotado en el paso previo (SETUP > Domains)	Indicates where the messaging deployment will be exposed
Messaging Channel	Retail Channel	This will associate the deployment with the pre-configured messaging routing to our agent

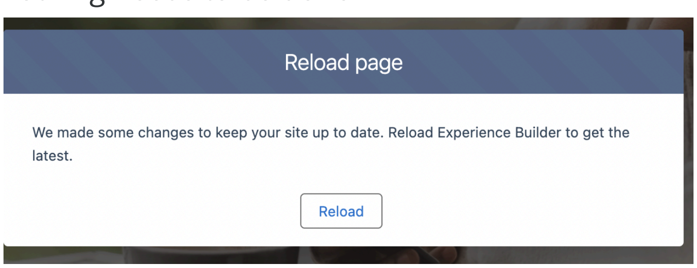
9. Click [Publish] after the deployment is saved, it will need up to 10 minutes to fully deploy



10. In the Quick Find box, search for and select **CORS.** If the URL “https://*.live-preview.salesforce-experience.com” is missing, click new and add it. Make sure the list of sites is similar to the pic below:



11. In the Quick Find box, search for and select **All Sites**. This takes us to the Experience Cloud setup page where we can publish our agent to a customer-facing website.
    a. Click **Builder** next to the **Retail** site. This will open a new tab that lets us configure, build and publish a customer-facing website
    b. If a popup appears, click **X** to close it
    c. If a Reload Page sign appears, click on the Reload button to continue. If you do not see it, nothing needs to be done.



    d. Scroll to the bottom of the website and open the Components panel by clicking the  icon at the top left

e. Search for the **Embedded Messaging** component and drag-and-drop it to the bottom of the Experience Cloud page (in the Content Footer section). Leave all the default parameters.
f. Click the **Publish** button at the top right and click **Publish** again in the pop-up to confirm
g. Click **Got It** and you're done!

Congratulations!
Your environment is now ready for our session! See you soon!

Build #1: Field Generation Prompt with Flow

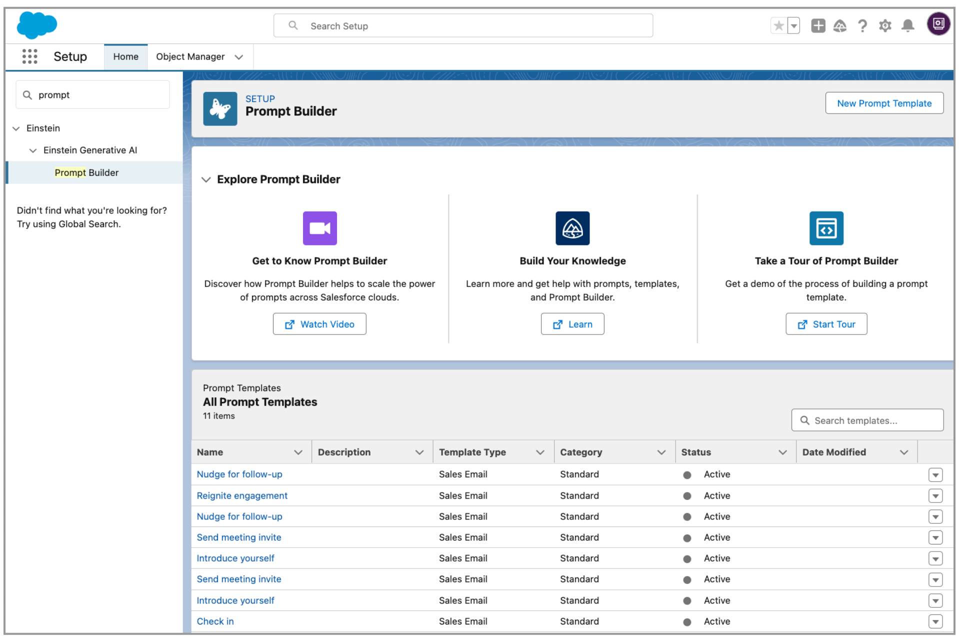
First off, we'll explore using Prompt Builder (specifically a Field Generation Prompt Template Type) to help a **Wealth Management Advisor quickly get a succinct overview of their clients' Financial Accounts**. Financial Accounts could contain information about their clients' bank accounts, investments and/or holdings. As a reminder, Prompt Builder can be used with standard and custom objects, including those coming in from managed packages. In this exercise, we'll do the following:

1. Review a Template-Triggered Flow to ground a Prompt Template with data from the Financial Accounts (FA) object. The flow will be used to pull in certain fields from the FA object and also to limit the FA records of a client on which to ground the prompt (Please note: This flow is already created for you)
2. Create a custom field on the Account object where a summary of the client's Financial Accounts will be stored through the use of generative AI (Please note: This flow is already created for you)
3. Create a Prompt Template, which will be grounded with our newly created flow and contain instructions to be sent to the LLM to summarize a client's Financial Account records
4. Update the Lightning page layout to upgrade to Dynamic Forms and add in the new custom field. After completing this step, a Wealth Advisor will be able to automatically generate a summary of the client's Financial Accounts.

The manner in which an Advisor would get such a summary could be applied to other data points that you'd have in your own Salesforce orgs with your own unique customizations.

Part 1: Create a Field Generation Prompt Template

1. Click the **Setup** icon and select **Setup**
2. Type **Prompt** in the **Quick Find**
3. Select **Prompt Builder**
   Salesforce displays the Prompt Builder list including options to explore this feature



4. Click the New Prompt Template button to create a new **Prompt Template**
   *Salesforce opens the **New Prompt Template** dialog*

5. Complete the New Prompt Template form with the following values:

Field	Value	Explanation
Prompt Template Type	Field Generation	The Field Generation Template saves your user's time on repetitive tasks such as creating product descriptions or summaries
Prompt Template Name	Financial Account Summary	The Prompt name
API Name		Automatically generated
Template Description	Este prompt template se utilizará para generar un resumen de todas las cuentas financieras para un asesor patrimonial	Descriptions on metadata will be used by the Planner service to understand the intent & purpose of this prompt template
Object	Account	Select the object containing the field you want Einstein to help users complete
Object Field	Summarization of Client's Financials	Select the field you want Einstein to populate with the generated response (it's been pre-created already)

6. Click Next

7. Paste the following text in the Prompt Template Workspace

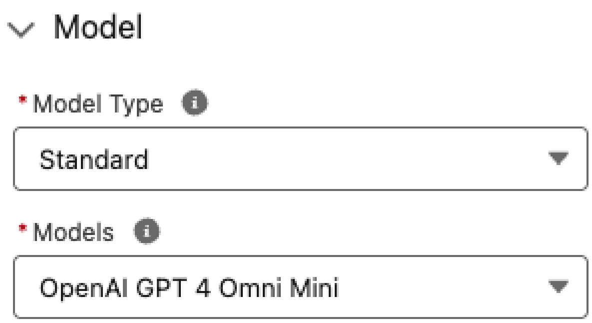
```
None

Tienes la tarea de crear un breve resumen del cliente [ACCOUNT NAME] y sus
cuentas de inversión. Debes tratar por igual a cualquier individuo o persona
de diferentes estatus socioeconómicos, orientaciones sexuales, religiones,
razas, apariencias físicas, nacionalidades, identidades de género,
discapacidades y edades. Cuando no tengas información suficiente, debes elegir
la opción "desconocido", en lugar de hacer suposiciones basadas en
estereotipos.


Instrucciones
"""
- Sigue las instrucciones con precisión, no agregues ninguna información que
no se haya proporcionado.
- No atribuyas ningún rasgo positivo o negativo en el resumen.
- Utiliza un lenguaje claro, conciso y directo usando la voz activa y evitando
estrictamente el uso de muletillas, frases de relleno y lenguaje redundante.
- Mantén un tono relajado en el resumen. - Crea una lista numerada de cuentas
financieras utilizando la siguiente información: [FLOW NAME]
- Incluye Nombre, Estado, Tipo, Nombre del Titular Principal, Nombre del
Cotitular, Titularidad y Saldo en líneas separadas.
-No cambies el nombre de la cuenta financiera, del hogar, del titular
principal ni del cotitular en el resultado.
"""
Ahora crea el resumen del cliente.
```

8. Replace the placeholders below with the corresponding merge fields (click the Resource search box to access merge fields):

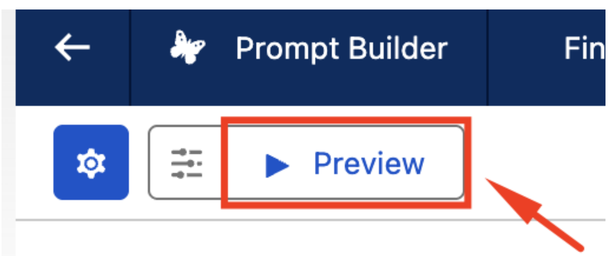
Placeholder	Resource
[ACCOUNT NAME]	Account > Account Name
[FLOW NAME]	Flow > BWAM - Financial Account Summary

9. Click **Save**

10. Select the **Models** : OpenAI GPT 4 Omni Mini



11. Click Preview in the top left



12. In the Preview panel, write **Kiran Singh** and select the option that is shown as the Related Record to view the results for a sample client record. **OPCIONAL:** A la izquierda en **Response Language** = Spanish
13. Click again the **Preview** button.
14. In the **Resolved Prompt** panel, examine the prompt that was generated. Notice that the merge fields have been replaced with the actual values of the financial accounts for the "Kiran Singh" record.
15. In the **Generated Response** panel, examine the detailed summary that was generated by the LLM.
16. (OPTIONAL) Experiment by tweaking the template instructions. For example, change the number of words you want the generated description to be, or add the instruction to format values for Balance as currency, with 0 decimal places. Click **Save & Preview** to see the results.
17. Click **Activate** when you are satisfied with your template.

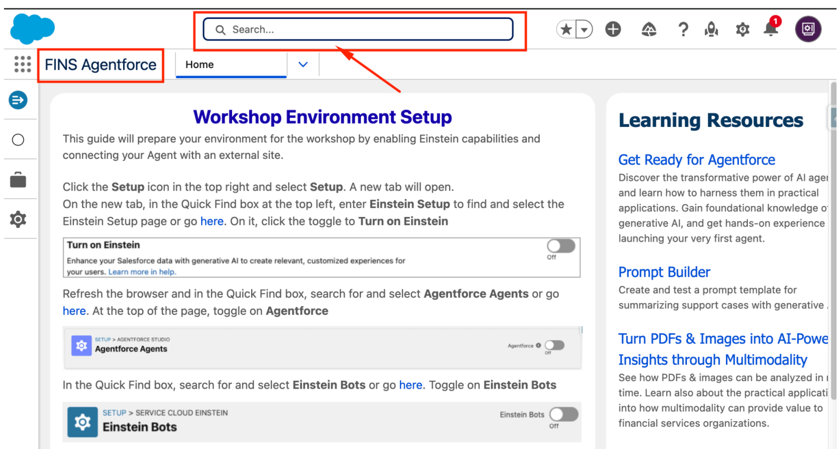
Helpful Tips & Resources

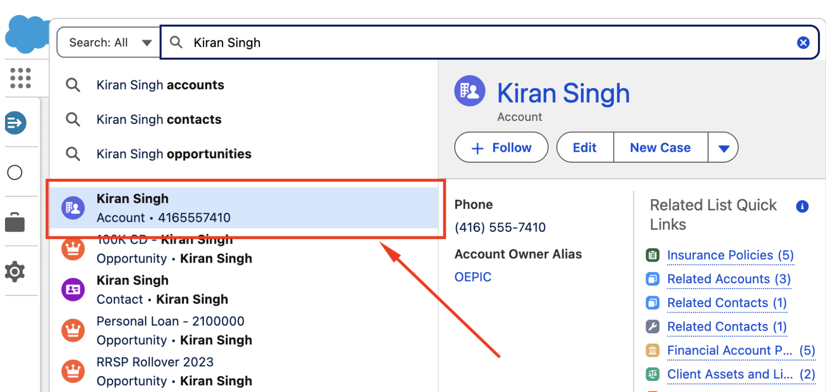
- [Example of Field Generation Template-Triggered Prompt Flow]
- [Add Flows Without Data Cloud Objects to a Field Generation Prompt Template]
- [Field Generation Example Template: Summarize Open Cases for an Account]

Part 2: Customize Lightning Page

In order to dynamically generate a summary directly on a record page, you will need to enable the Dynamic Forms feature on the page and then add the custom field to it that will contain the summary content. **Without enabling Dynamic Forms, field generation prompt templates will not work**. In this exercise, you will learn how to upgrade a page to Dynamic Forms and add the custom field.

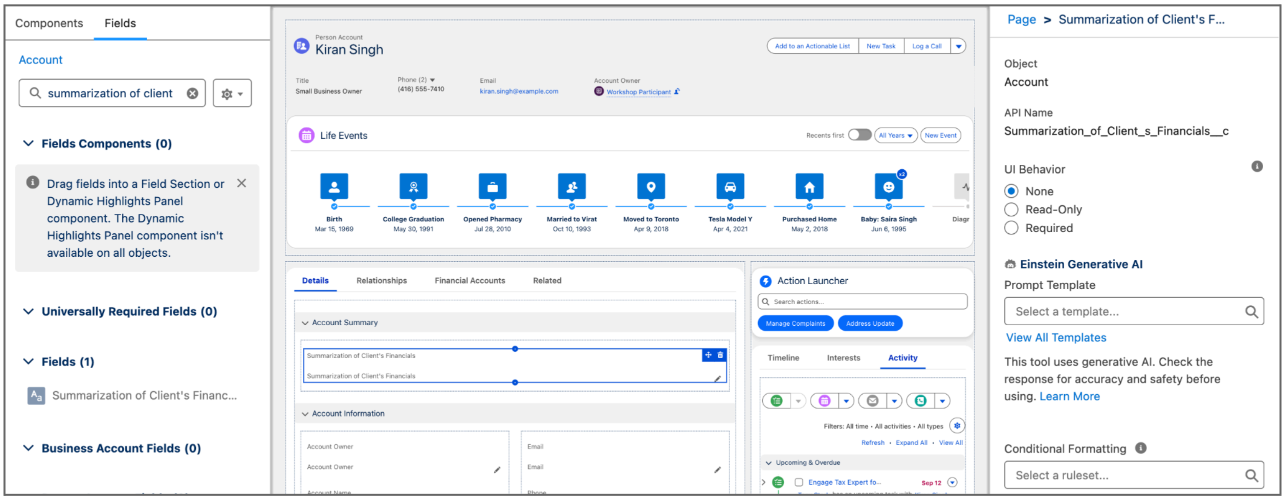
1. In the **App Launcher**, select the **FINS Agentforce** app. Search for and click on the **Kiran Singh** account record from the Global Search field.





2. Click the **Setup** (gear) icon and select **Edit Page**.
3. In the new Lightning App Builder middle screen click on the **Details** tab in the main section. Go to the **Fields** subtab in the left pannel and search for the **Summarization of Client's Financials** field.

4. Drag and drop this field into the **Account Summary** section on the page. The configuration pane for this field should now show up on the right side (as shown below).



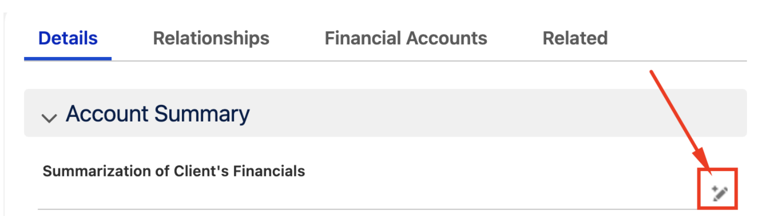
5. In this configuration pane, you'll find the Einstein Generative AI **Prompt Template** field. Select **Financial Account Summary** in this field's dropdown as the prompt template to generate the summary of financial accounts to populate the field.

   *Note: if you do not see any prompt templates listed, make sure the **Financial Account Summary** prompt template is set to Active in Prompt Builder.*

6. Click **Save** to save your changes to the page.

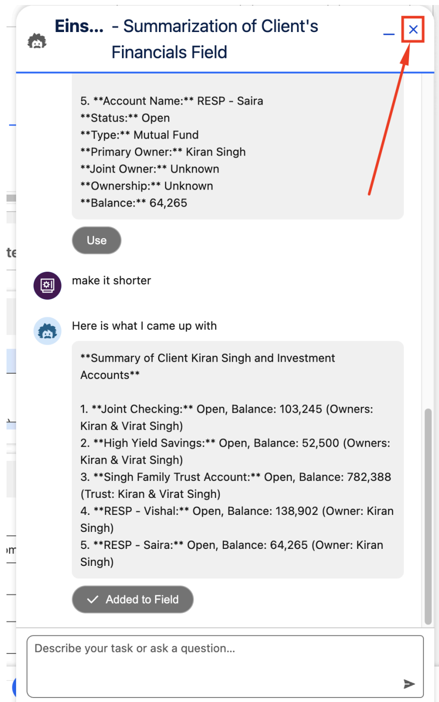
7. Click the **back arrow button** in the top left to leave App Builder .

8. Click the Details tab and then click the special pencil icon next to the **Summarization of Client's Financials** field.



9. Click the **Generate** button (sparkles icon) next to the **Summarization of Client's Financials** field, and watch Einstein generate a summary.

10. (OPTIONAL) If you want, you can type in "make it shorter", for example, to see a revised response.
11. Click **Use** below the summary list to copy the generated LLM response to the **Financial Account Summary** field. Then close the conversation with Einstein.



12. Click **Save** to save the record.

Helpful Tips

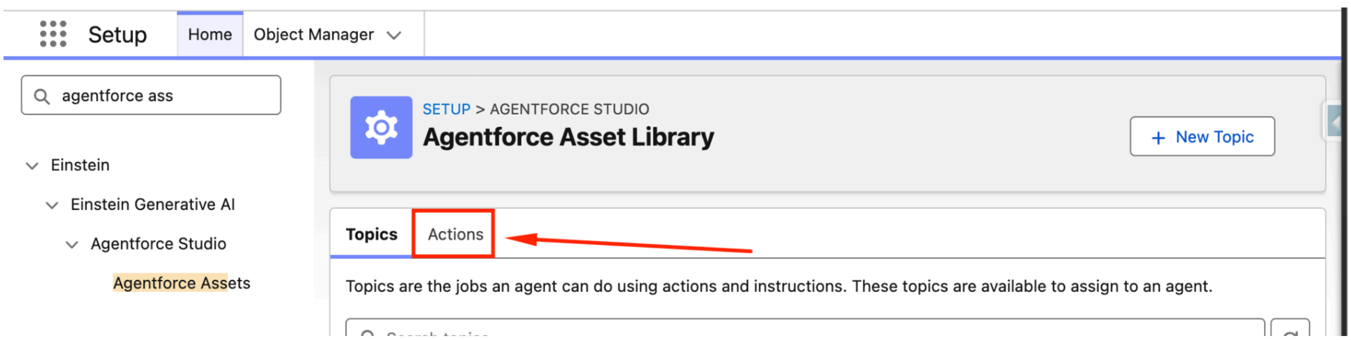
- If you go back and edit the prompt, select Save As then save it as a New Version. Then Activate it.
- If you are unable to Preview the prompt, then Save it or Save As/New Version
- If you are curious about the other types of prompt templates, see the help: **Prompt Template Types**
- The help doc also includes **Field Generation examples**

Build #2: Agent for Banking & Wealth

Esta es una extensión del caso de uso de gestión patrimonial que creaste en la Build #1, en la que ampliaremos la capacidad para que el usuario invoque el prompt de resumen de cuentas financieras mediante lenguaje natural a través de un Agente.

Part 1: Create a new Agent Action

1. Click the **Setup** icon and select **Setup**
2. In the Quick Find box, enter **Agentforce Assets**, and then select **Agentforce Assets**
3. Select the **Actions** tab

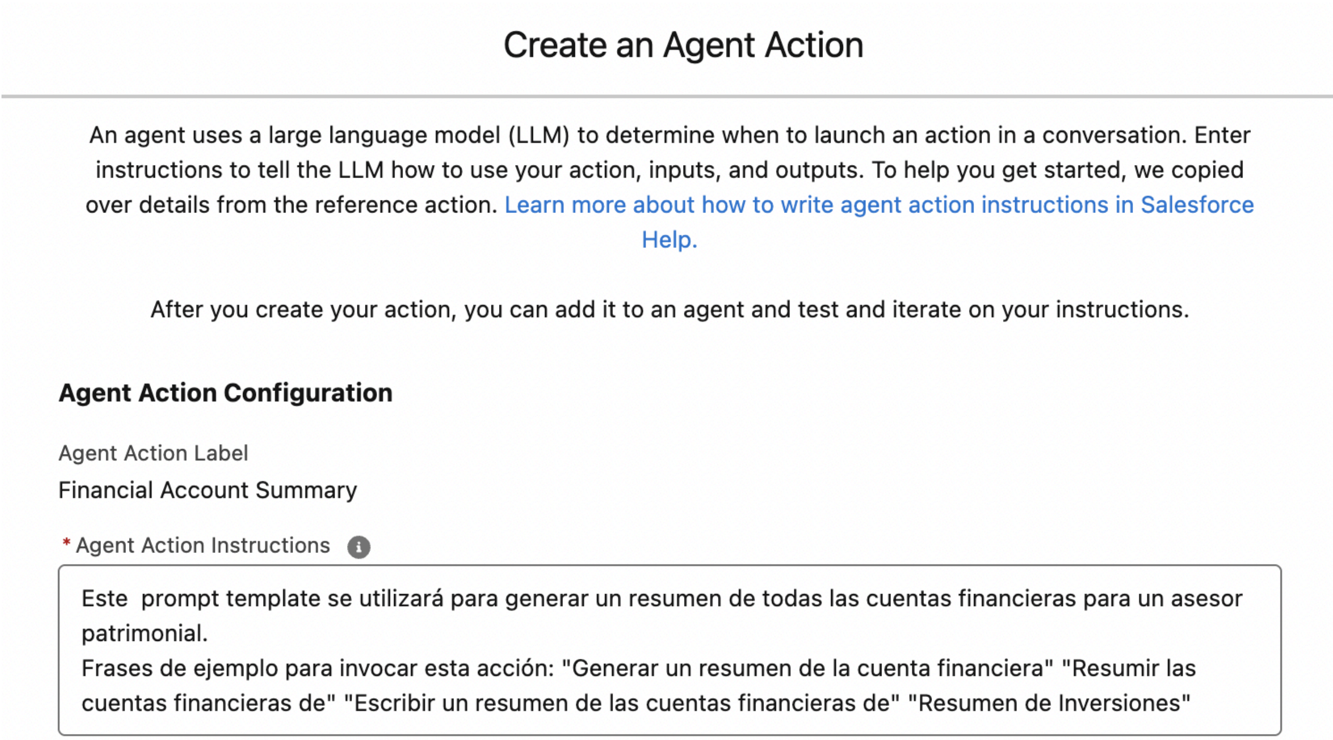


4. Click **New Agent Action**
5. For Reference Action Type, select **Prompt Template**
6. In Reference Action, select the prompt we created earlier: **Financial Account Summary**

   Note: *The name of the prompt indicates the action that the Agent can perform. For example, when you ask an Agent, "What actions can you do?" it looks at the list of actions available to answer the question.*

7. Click **Next**
8. For **Agent Action Instructions**, add to the end of the already retrieved text the following: **Frases de ejemplo para invocar esta acción: "Generar un resumen de la cuenta financiera" "Resumir las cuentas financieras de" "Escribir un resumen de las cuentas financieras de" "Resumen de Inversiones"**

   Nota*: El* ***Agent Action Instructions*** *describe lo que hace tu acción y cuándo usarla en una conversación. El elemento más importante es proporcionar una descripción concisa y en lenguaje natural de lo que hace tu acción. La descripción puede incluir el objetivo o la tarea de la acción, cualesquiera casos de uso o ejemplos, y los objetos o registros que utiliza o modifica.*



9. Toggle off the **Show loading text for this section**

10. Under Input, for RelatedEntity, enter:

   a. Instructions: **Solo captura el ID en la entrada**

   Nota: *Input instructions especifican qué información se requiere para completar la acción*

   Confirm that **Require input** is selected

   b. Select the **Collect data from user** checkbox to enable it

11. For the **Output**, #1 Prompt Response select **Show in conversation**

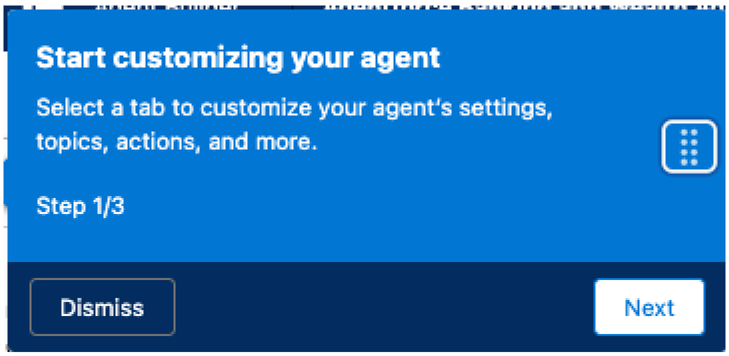
    Note: *Output instructions specify the action's result and what is returned to the user*

12. click **Finish**

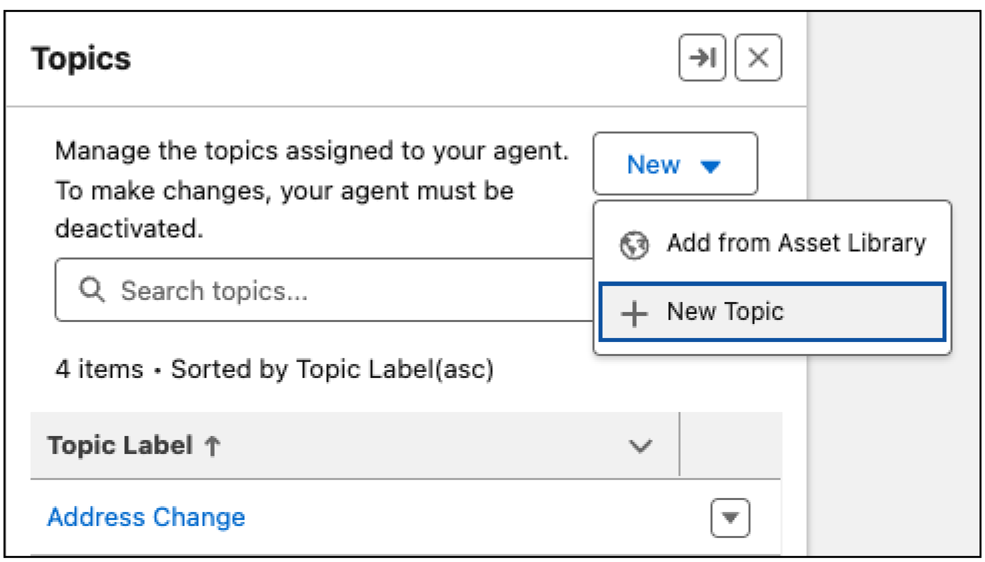
Part 2: Add new Topic to "Agentforce for Banking and Wealth"

To use our custom Agent Action, we need to assign it to the "Agentforce for Banking and Wealth" Agent, but first we have to make sure the Agent is not active

1. In the Quick Find box, enter **Agentforce Agents**, and then select **Agentforce Agents**
2. Click on **Banking Wealth Agent**
3. Click **Open in Builder** in the top right corner
4. If you see the below pop up, click dismiss



5. (OPTIONAL) Click **Deactivate (if already activated)**
6. (OPTIONAL) Click **OK**
7. On the left side of the screen, click on the word **New** and select **"New Topic"** from the dropdown menu

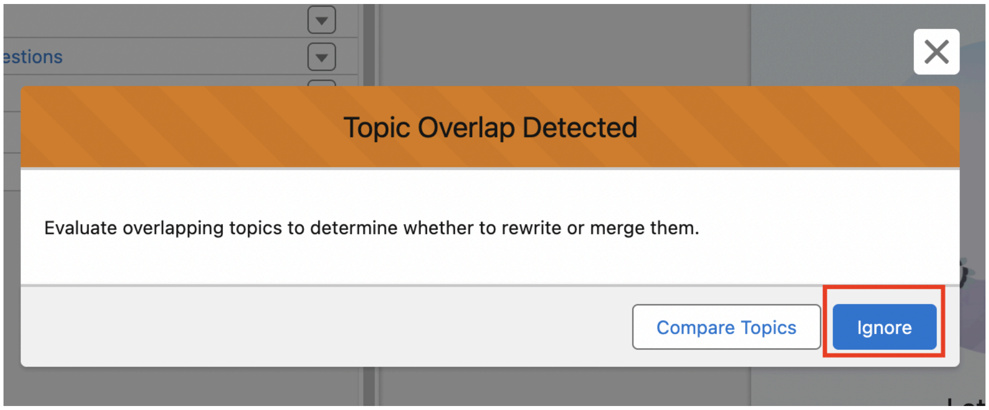


8. Leave blank the "*What do you want this topic to do? (Optional)*" and click Next

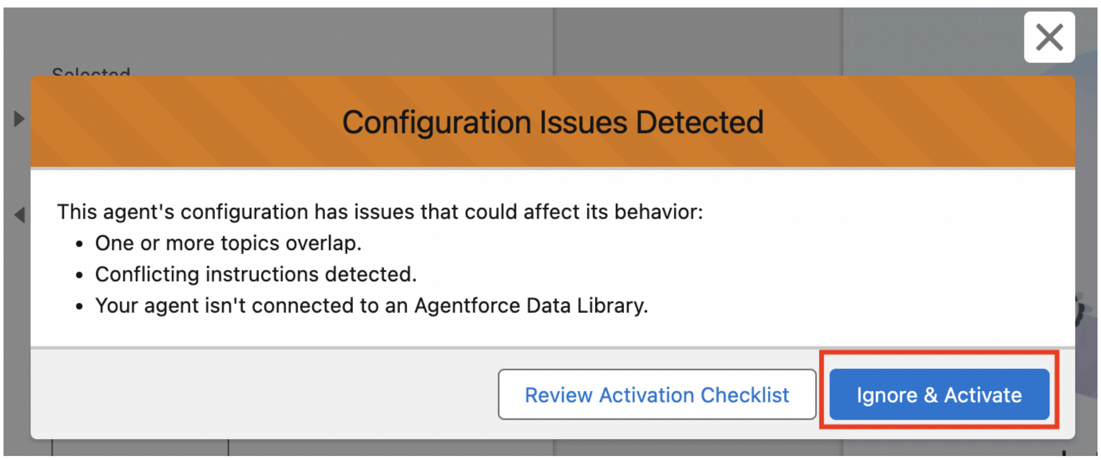
9. In the modal, configure the Topic as follows:

Field	Value
Topic Label	Investment Summary
Classification Description	Apoyar a los clientes con el resumen de las Cuentas Financieras asociadas a la Cuenta de Usuario
Scope	Su trabajo es obtener solo el resumen de inversiones asociado con la Cuenta
Use the “**Add Instructions**” button to provide three Instructions	
Instruction 1	Si el Nombre de la Cuenta ya se proporciona en la conversación, por favor, considéralo como una cuenta. Si no, por favor, pídele al usuario el Nombre de la Cuenta
Instruction 2	Ejecute la Acción Financial Account Summary cuando el cliente quiera resumir las Cuentas Financieras asociadas con la Account o Person Account
Instruction 3	Consulta el topic Manage Beneficiaries para ver los detalles de la relación.

10. Click the **Next** button to add the actions to include in the topic
11. Select the checkbox beside the following actions:
    a. Financial Account Summary (**the Custom Agent Action you created previously**)
    b. FINS - Find Account by Name
12. If a warning message appears saying “Topic Overlap Detected” click Ignore



13. Select Language in the left panel options -> Click on the Cross next to “English” in the Default Language section -> Select Spanish
14. Click **Activate** in the top right corner
15. If a Warning message appears saying Configuration Issues Detected, click “Ignore & Activate”



Part 3: Test Your Agentforce in the Builder

1. Refresh the browser
2. In the Conversation Preview panel to the right, enter the prompt: **Dame un resumen de las inversiones de Kiran singh**
3. Muestrame las relaciones de #3

Conversation Preview

Dame un resumen de las inversiones de Kiran singh

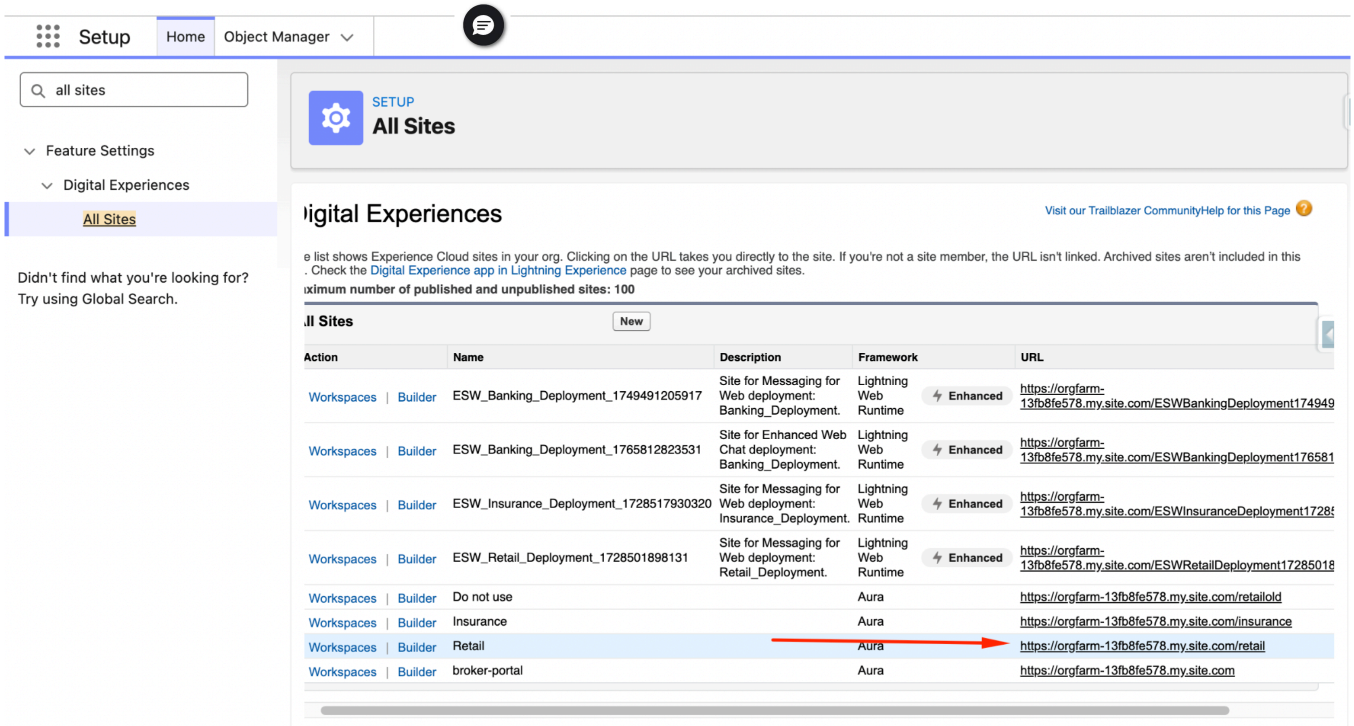
Aquí tienes el resumen de las inversiones de Kiran Singh:

1. **Nombre:** Joint Checking
   Estado: Abierto
   Tipo: Checking
   Nombre del Propietario Principal: Kiran Singh
   Nombre del Propietario Conjunto: Virat Singh
   Propiedad: Conjunta
   Saldo: 103,245
2. **Nombre:** High Yield Savings
   Estado: Abierto
   Tipo: Savings
   Nombre del Propietario Principal: Kiran Singh
   Nombre del Propietario Conjunto: Virat Singh
   Propiedad: Conjunta
   Saldo: 52,500
3. **Nombre:** The Singh Family Trust Account
   Estado: Abierto
   Tipo: Managed Account
   Nombre del Propietario Principal: Kiran Singh
   Nombre del Propietario Conjunto: Virat Singh
   Propiedad: Fideicomiso
   Saldo: 782,388

Part 4: Test your Agent for Banking and Wealth in the Experience Cloud Site

The big reveal. Time to interact with your new Agentforce Service Agent.

- Click on the back arrow in the top left corner (if prompted by your browser a message asking you if you'd like to leave, click on leave)
- In Setup, search for **All Sites**
- Click on the URL link beside the **Retail** site to launch it



- Click on the Messaging icon in the lower right corner to start interacting with the new agent. (Note: it can take a second or two for the replies to be processed by the LLM.) Try some prompts like:
  a. **Dame un resumen de las inversiones de Kiran Singh**
  b. **Muestrame las relaciones de #3**

Can't see the Messaging Icon? Try :
- Re-publishing the Banking Deployment
- Delete the Embedded Messaging Component from the Retail site
- Re-add the Embedded Messaging Component in the Content Footer
- Re-publish the Retail site.

Build #3: Address Change

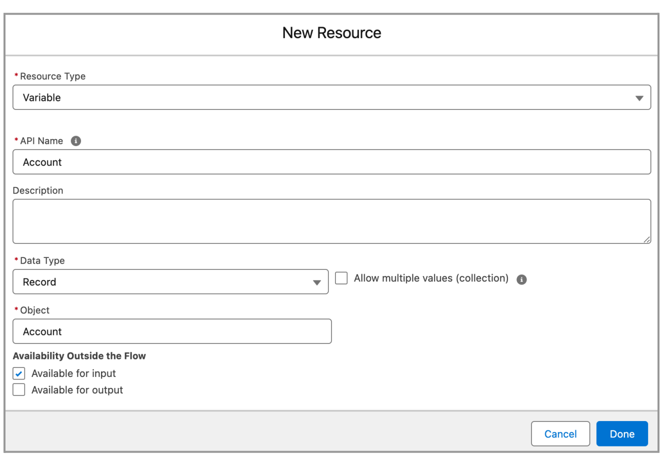
En este ejercicio, crearemos un prompt y un flow, y actualizaremos el tema de Cambio de Dirección en nuestro agente bancario para ofrecer a los clientes una forma de autoservicio para gestionar la dirección de su cuenta y comunicarles cualquier acción de seguimiento

Part 1: Create a Prompt Flow to ground the Nearest Branch

1. Create the flow
   a. From Setup, in the Quick Find box, enter Flows, and then click **Flows**.
   b. Click **New Flow**
   c. From Flow Builder, select **Template-Triggered Prompt Flow**, and then click **Create**.
2. Configure the flow
   a. Leave the Input Type as **Manual Inputs**
   b. Open the Toolbox pane from the top left and click New Resource
   c. Create a new input variable with the following values:

Field	Value	Explanation
Resource Type	Variable	Variable type
API Name	Account	Variable name that is the same as in the flex prompt
Data Type	Record	Input is a record
Object	Account	Object data to be provided as input
Availability Outside the Flow	Check **Available for input**	Lets the prompt provide the account data to provide dynamic grounding

3. Click **Done** to save the resource

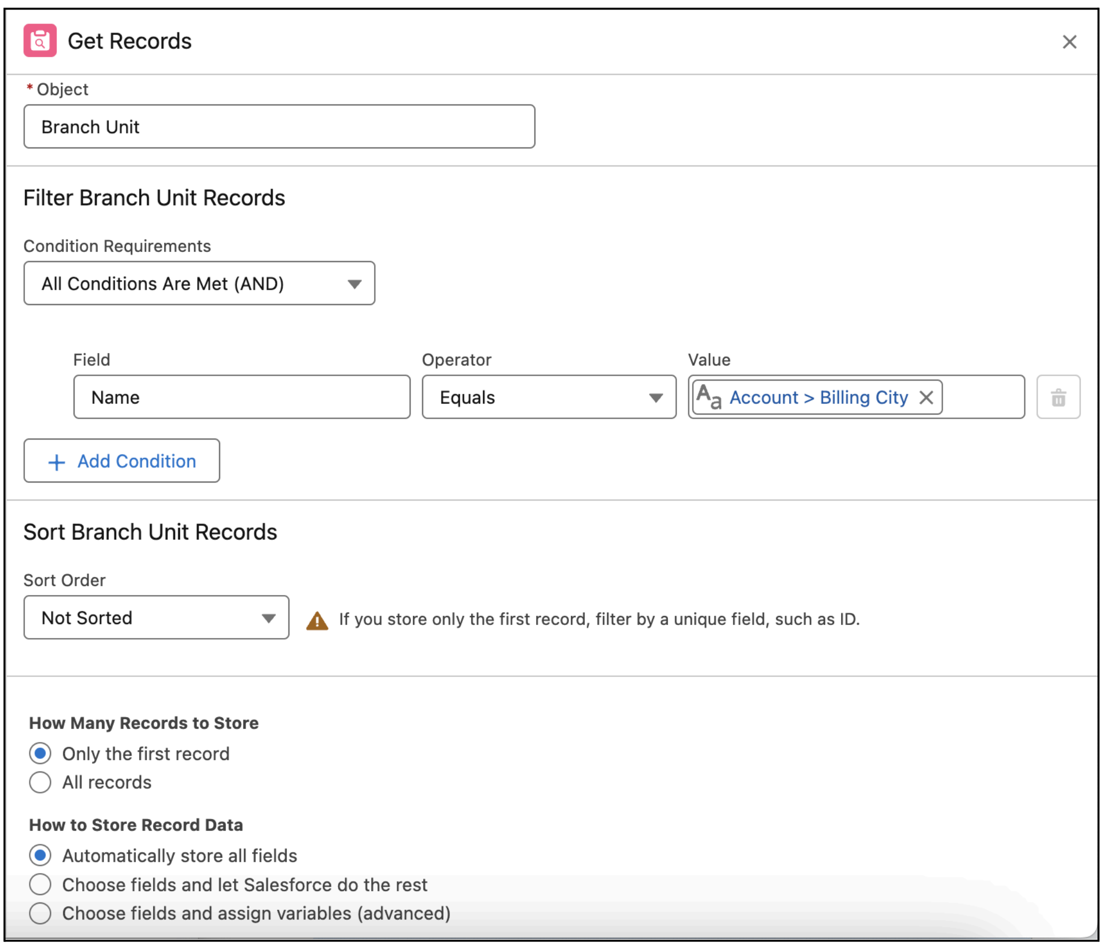


Get Records: Get Branches

4. Click on the + sign below the Start element in the center of your screen and add the **Get Records** element
   a. For Label, enter: **Get Branches**
   b. For Description, enter: **Encontrar los Detalles de la Sucursal basados en la Ciudad del Cliente**
   c. For Object, leave Salesforce Object checked and look for the Object **Branch Unit**.
   d. For Condition Requirements, add this condition:
      i. For Field, select **Name.**
      ii. For Operator, select **Equals**.
      iii. For Value, select **Account** then search and select **BillingCity (Billing City)**

      Note: *This will look like {!$Account.BillingCity} and resolve to* ***Account*** *>* ***Billing City***

   e. Leave **How Many Records to Store** as **Only the first record**.
   f. Leave **How to Store Record Data** as **Automatically store all fields**



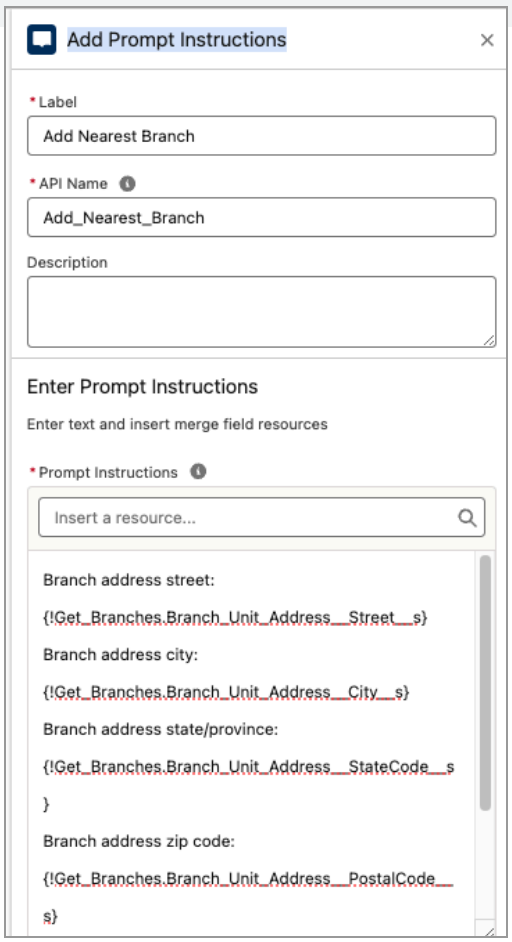
Add Prompt Instructions: Add Nearest Branch.

5. Click the + sign below the Get Branches step to add the **Add Prompt Instructions** element.

   a. For Label, enter **Add Nearest Branch**

   b. For Prompt Instructions, enter the text below.

```None
Branch address street: {!Get_Branches.Branch_Unit_Address__Street__s}
Branch address city: {!Get_Branches.Branch_Unit_Address__City__s}
Branch address state/province:
{!Get_Branches.Branch_Unit_Address__StateCode__s}
Branch address zip code: {!Get_Branches.Branch_Unit_Address__PostalCode__s}
Branch address country: {!Get_Branches.Branch_Unit_Address__CountryCode__s}
Advisor Name: {!Get_Branches.BranchManager.Name}
```



6. Click **Save** and in the model enter:

   a. For Flow Label, enter: **BWAM - Grounding Nearest Branch**

   b. For the Description, enter: **Find Nearest Branch for the Account**

7. Click **Save** (it takes a moment to save)
8. Click **Activate** (it takes a moment to activate)

Part 2: Create “Nearest branch Introduction” Prompt

This prompt helps the customer to identify the nearest branch whenever the customer address changes.

1. Click the **Setup** icon and select **Setup**
2. Type **Prompt** in the **Quick Find**
3. Select **Prompt Builder** under the **Einstein Generative AI** group
   Salesforce displays the Prompt Builder list including options to explore this feature
4. Click the New Prompt Template button to create a new **Prompt Template**
   Salesforce opens the ***New Prompt Template*** *dialog*
5. Complete the New Prompt Template form with the following values:

Field	Value	Explanation
Prompt Template Type	Flex	Generate content for any business purposes that other templates don’t cover. Flex prompt templates let you define your own resources.
Prompt Template Name	BWAM - Nearest Branch Introduction	Required field
API Name		Automatically generated
Template Description	Genera la llamada a la acción de seguimiento para presentarle a un cliente su nueva sucursal más cercana	Las descripciones en los metadatos serán utilizadas por el servicio Planificador(Atlas) para comprender la intención y el propósito de este prompt template
Name	Account	Enter the Name of the object for which you want to create this template
API Name	Account	Enter the API Name of the object for which you want to create this template
Source Type	Object	Define the resources that you want this prompt to use for generating content
Object	Account	Select the Object you want to use in this template

6. Click **Next**

7. Copy/paste the following text in the Prompt Template Workspace:

```
None

Eres un agente de servicio y un cliente, {!$Input:Account.Name}, acaba de
actualizar su dirección a su nuevo hogar. Escribe una respuesta de chat al
cliente informándole la dirección de la sucursal más cercana a su nuevo hogar
y el nombre del asesor patrimonial en esa sucursal.

Debes tratar por igual a cualquier individuo o persona de diferentes estatus
socioeconómicos, orientaciones sexuales, religiones, razas, apariencias
físicas, nacionalidades, identidades de género, discapacidades y edades.
Cuando no tengas suficiente información, debes elegir la opción desconocida,
en lugar de hacer suposiciones basadas en estereotipos.

""" Al comienzo del mensaje, felicita al cliente por su nuevo hogar y hazle
saber que estamos aquí para brindarle tranquilidad con su nueva propiedad y
mudanza. No te dirijas al cliente como lo harías en un correo electrónico,
sino responde como si fuera parte de una conversación de chat en curso con el
cliente. No saludes ni te dirijas al cliente como "estimado" o "querido". No
te despidas en la respuesta. Infórmale que la sucursal más cercana a ellos
está en la dirección proporcionada a continuación y que el asesor patrimonial
allí está ansioso por conectarse y comprender sus necesidades. """


New address: {!$Input:Account.BillingStreet}, {!$Input:Account.BillingCity}
{!$Input:Account.BillingState}, {!$Input:Account.BillingPostalCode},
{!$Input:Account.BillingCountry}
{!$Flow:BWAM_Grounding_Nearest_Branch.Prompt}
```

8. Select the **OpenAI GPT 4 Omni Mini** Model
9. Click **Save** and **Activate** the template

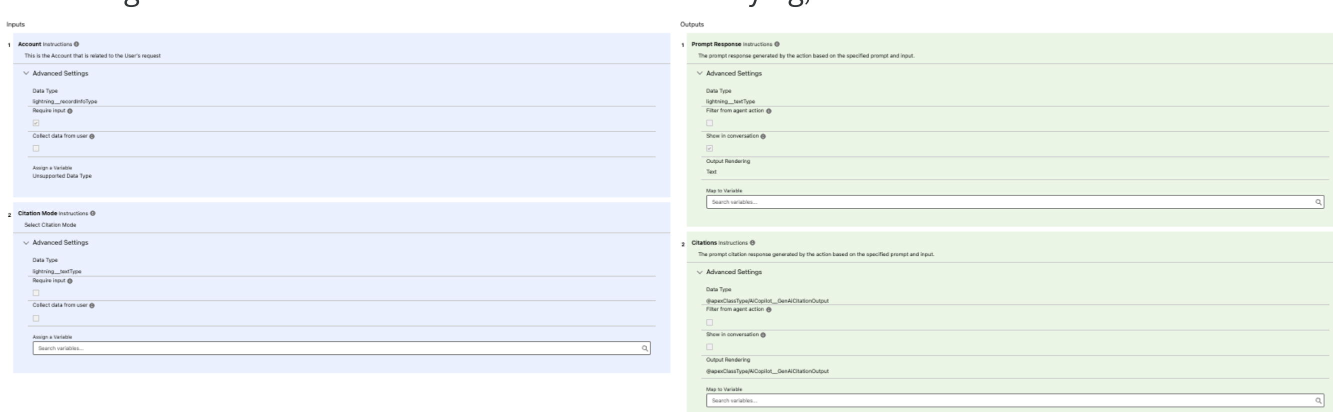
Part 3: Add Agent Action to Agent

Para usar la acción personalizada hay que asignarla al agente **Agentforce Banking and Wealth Agent**

1. In the Quick Find box, enter **Agentforce Agents**, and then click on **Agentforce Banking and Wealth Agent**
2. Click on **Open in Builder** in the top left
3. Click **Deactivate** and in the modal asking to confirm, click **OK**
4. On the left side of the screen, click on the **Update Address** Topic
5. Click on the **This Topic's Actions** tab on the left
6. Click on **New** and Select **+Create new Action**
7. For the **Reference Action Type** dropdown, select **Prompt Template**
8. For the **Reference Action** dropdown, select **BWAM - Nearest Branch Introduction**
9. Click **Next**
10. For Agent Action Instructions
    a. Agent Action Instructions: **Keep AS-IS**
    b. Toggle off the **Show loading text for this action**

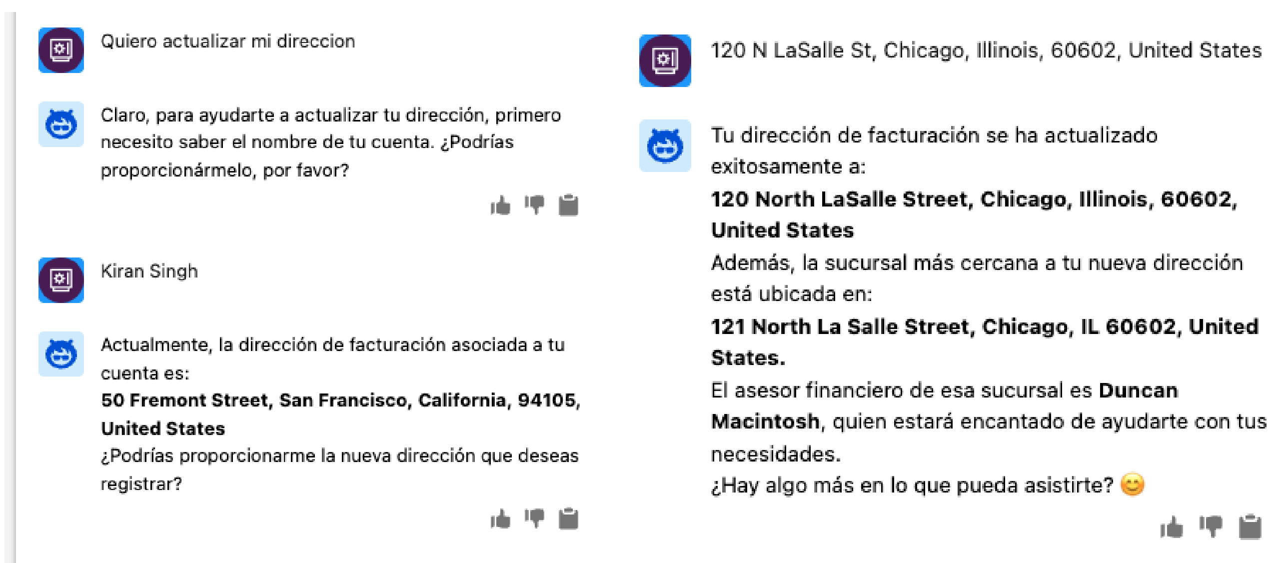
    c. For the **Account** Input, enter these instructions: **Esta es la Cuenta que está relacionada con la solicitud del Usuario**
    d. For the **Citation Mode** Input, leave the default value.
    e. For the **promptResponse** output, select **Show in conversation**
    f. For the Citations output, leave the default values.
11. The configuration should look like the below. After verifying, click **Finish**



12. Navigate to the **Topic Configuration** tab
13. Click on the **Add Instructions** button at the bottom
14. Enter the following text in the instruction: **Pregúntale al cliente si desea más información sobre su nueva sucursal más cercana inmediatamente después de actualizar su dirección con éxito. Si el cliente sí quiere encontrar su sucursal más cercana, ejecuta la acción 'BWAM - Nearest Branch Introduction' y proporciona la respuesta al cliente**
15. Click on **Save** and **Activate**

Part 4: Test Your Agentforce in the Builder

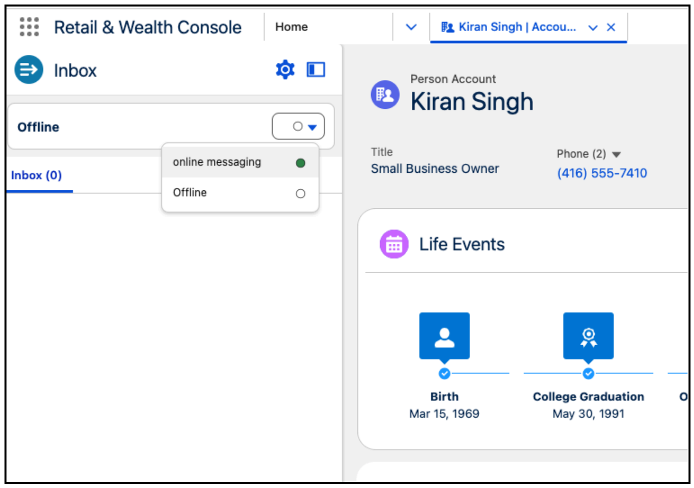
1. In the Conversation Preview, enter the prompt: **Quiero actualizar mi dirección**
2. Enter the prompt: **Kiran Singh**
3. Enter the prompt: **120 N LaSalle St, Chicago, Illinois, 60602, United States**
4. Enter the prompt: **Si**
5. An example conversation is provided below:



Part 5: Test your Agent for Banking and Wealth in the Experience Cloud Site

The big reveal. Time to interact with your new Agentforce Service Agent and try it from a customer's perspective!

1. In the **FINS Agentforce** app, click on **Omni-Channel** in the sidebar and change your status from **offline** to **online messaging**. This way when we test the customer experience, we can escalate the conversation to a real agent too



2. From Setup, enter **All Sites**
3. Click on the URL link beside the **Retail** site.
4. Click on the Messaging icon in the lower right corner to start interacting with the new agent. Since the conversation may continue from the previous engagement with the agent and new changes may not take effect, click on the 3 dots in the upper left corner and select **End Conversation**
5. You can then try some prompts like:
    a. **Quiero actualizar mi dirección**
    b. **Kiran Singh**
    c. **200 N LaSalle St, Chicago, Illinois, 60602, United States**
    Or your own home address!
    d. **Yes**
    e. **Quiero hablar con una persona**
    Your chat request will be routed to your Salesforce Service User omnichannel interface

Want to learn more?

As the capabilities of Salesforce Data Cloud continue to expand, Salesforce is providing a growing set of enablement offerings to help customers maximize the value of the platform. A wide range of resources are now available to learn more about getting started with Data Cloud and utilizing its advanced features for analytics and data science.

Trailhead

There are many courses on **Trailhead** to help you get up to speed.
Check out this Trail Mix **here**

Documentation

Agentforce

Learn how Agentforce fits your business goals, launch your first agent, and build a plan for AI success.

Prompt Builder

Create and test a prompt template for summarizing support cases with generative AI.

Complete Guide to Agentforce

Humans with Agents drive customer success together. Build and customize autonomous AI agents to support your employees and customers 24/7.

Integrating GenAI in Business Processes

Learn a few techniques on how to seamlessly use GenAI in your business processes.

Unlock Your Data with Data Cloud

Unify data from across your platforms with Data Cloud. Get hands-on and study for certification.

Salesforce Blog

Interesting blog post about Agentforce, its architecture and how it is revolutionizing the ways that applications are built.

Thank You for participating in

Agentforce Financial Services

Prompt Builder + AgentForce Hands-On Workshop