



How to Configure and Invoke GPTfy via REST API

This document provides step-by-step instructions on how to configure and invoke GPTfy. The process involves invoking GPTfy through the REST API using a JSON-based callout, specifically targeting a particular record.

REST API Overview

The REST APIs that are developed for this requirement are as follows:

POST Request: This is the API that is used to execute GPTfy via REST.

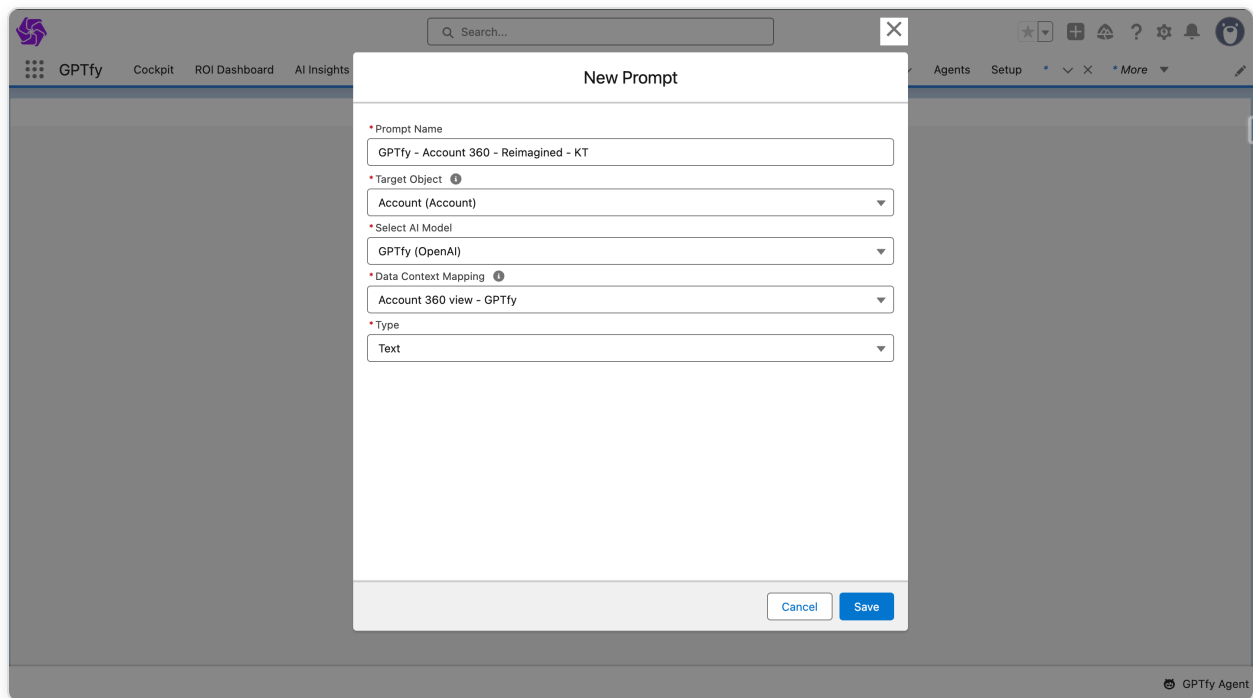
Step 1: Navigate to the Prompt tab of GPTfy

- Click on the **"Prompts"** tab.
- Click **New**.

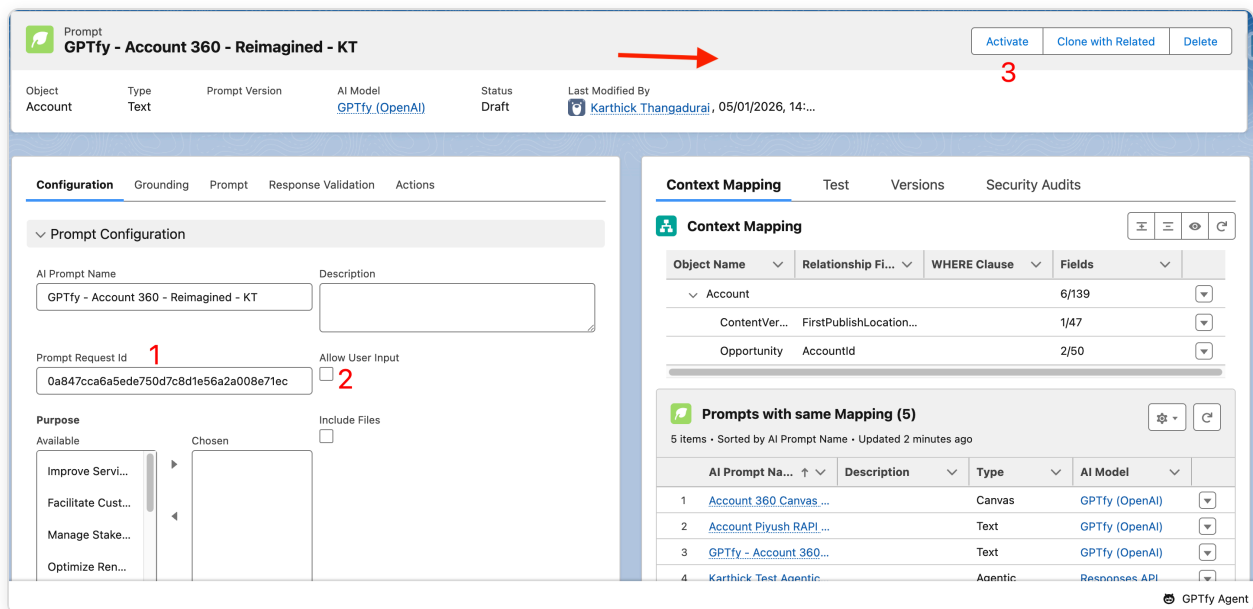
Step 2: Create a New Prompt

- Provide a suitable name for the prompt.
- Select the target object on which the prompt will be invoked.
- Specify the connection details.
- Define the mapping created for the prompt.
- Choose the prompt type (JSON or Text).

- Click on the **"Save"** button to save the prompt configuration.



- Once the prompt is created, PromptRequestId (1) gets generated.
- Click on Allow user Input checkbox (2), if we need to give personalised input at time of running.
- Activate the Prompt by clicking on the Activate button (3).



The screenshot shows the Salesforce Lightning interface for the 'Edge Communications' account. The URL bar indicates the account ID: `001QH000001h8eXYAQ/view`. The account details include:

- Type: Customer - Channel
- Phone: 8787878
- Website: www.edgecomm.com
- Account Owner: rahul gupta
- Industry: (blank)
- Annual Revenue: USD 139,000,000.00 (INR 11,120,000,000.00)

The 'Details' tab is active, showing a table of account information:

Field	Value	Rating
Account Owner	rahul gupta	Hot
Account Name	Edge Communications	
Parent Account	Sample account 1	
Account Number	CD451796	
Description	**Account Summary: Edge Communications**	
- **Account Number:** CD451796		
- **Phone:** 8787878		
- **Name:** Edge Communications		
- **ID:** 001QH000001h8eXYAQ		
- **Description:** The account has a positive sentiment.		

The right sidebar shows the 'GPTfy' section with a 'Voice' button and a list of 'Open Activities (3+)':

- Conduct time management training before the end of the mo...
 - Name: (blank)
 - Related To: Edge Communications
 - Task: ☒
- Update the marketing plan by December 10.
 - Name: (blank)
 - Related To: Edge Communications
 - Task: ☒
- Prepare a customer retention strategy by December 15.
 - Name: (blank)
 - Related To: Edge Communications
 - Task: ☒

Step 3: Access a REST Tool for API Invocation

To proceed with the invocation, access any REST tool, such as **Salesforce Developer Workbench** or **Postman**. (This example uses Salesforce Developer Workbench.)

The screenshot shows the Salesforce Developer Workbench interface. The 'workbench' logo is at the top. Below it, the 'Environment' is set to 'Production' and the 'API Version' is set to '58.0'. A checkbox labeled 'I agree to the terms of service' is checked. Below this, a disclaimer states: 'Workbench is free to use, but is not an official salesforce.com product. Workbench has not been officially tested or documented. salesforce.com support is not available for Workbench. Support requests for Workbench should be directed to Stackoverflow at <https://salesforce.stackexchange.com/questions/tagged/workbench>. Source code for Workbench can be found at <https://github.com/forceworkbench/forceworkbench> under separate and different license terms.'

A 'Login with Salesforce' button is located at the bottom right.

Step 4: Use the REST Explorer in Salesforce Developer Workbench

- Within the workbench, navigate to the **"Utility"** tab and select **"REST Explorer."**
- In the REST Explorer, select the **"POST"** method as we are making a POST request to execute GPTfy via REST.

Step 5: Enter the GPTfy REST Call URL

In the **POST** method, input the GPTfy REST call URL for the API invocation:

API Endpoint:

```
/services/apexrest/ccai/v1/executePrompt
```

Body

```
{
  "promptRequestId": "0a847cca6a5ede750d7c8d1e56a2a008e71ec",
  "recordId": "001QH000001h8eXYAQ",
  "customPromptCommand": ""
}
```

Step 6: Prepare the Request Body in JSON Format

1. Copy the **PromptRequestId** and **RecordId** from the previous prompt creation step.
2. Paste the collected data into the appropriate fields within the JSON format of the request body.
3. Insert the custom prompt command if any.

workbench info queries data migration utilities

REST Explorer GPTFY ADMIN AT CLOUD COMPLIANCE ON API 58.0

Try the [Salesforce APIs for Postman](#).

Choose an HTTP method to perform on the REST API service URI below:

☐ GET ☒ POST ☐ PUT ☐ PATCH ☐ DELETE ☐ HEAD Headers Reset Up

/services/apexrest/ccai/v1/executePrompt Execute

Request Body

```
{
  "promptRequestId": "eb9ac1a149a89f91109301f4ac227630173d1",
  "recordId": "500Wd000006F9r8IAC",
  "customPromptCommand": ""
}
```

Step 7: Execute the REST API

Click the **Execute** button in the REST Explorer to invoke the GPTfy REST API.

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REST Explorer GPTFY ADMIN AT CLOUD COMPLIANCE ON API 58.0

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/services/apexrest/ccai/v1/executePrompt Execute

Request Body

```
{
  "promptRequestId": "eb9ac1a149a89f91109301f4ac227630173d1",
  "recordId": "500Wd000006F9r8IAC",
  "customPromptCommand": ""
}
```

[Expand All](#) | [Collapse All](#) | [Show Raw Response](#)

- ❏ statusCode: **200**
- ❏ status: **Processed**
- ❏ responseBody: **a0PWd0000015P3dMAE**
- ❏ message: **null**

The case involves a customer, Cherlyn Smalman, who has raised concerns about discrepancies between the Platts price assessments for crude oil on the company's platform and the actual market prices. She is seeking clarification on the methodology used for these assessments and the frequency of their updates. The case has been addressed by the support team, who have acknowledged the issue and are investigating the discrepancies. The case is now closed.

Requested in 4.265 sec
Workbench 62.0.0

Step 8: Review the API Response

The REST API will return a **Success** status code (200) upon successful execution. The response will include important details such as:

- **Status**
- **Success**
- **responseld**
- **responseBody**