

Unlocking the Power of Unstructured Data for AI Agents

**Presentation by
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OUR SPEAKER



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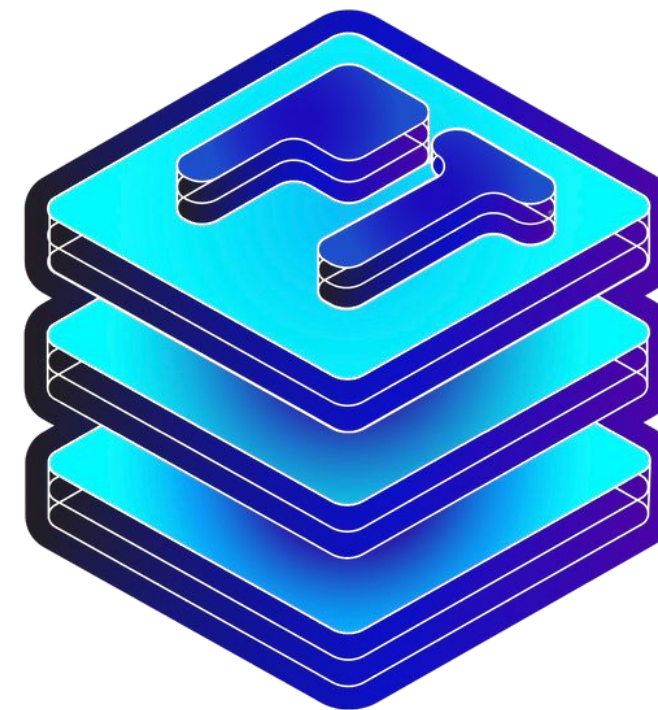
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The Power and Peril of Unchecked Intelligence

AI at Full Speed, No Seatbelt

AI is like unleashing a horde of caffeinated interns with no manager, no office and access to every book ever written – **what could go wrong?**



AI Hallucinations in the Wild: Cases

OpenAI sued for defamation after ChatGPT fabricates legal accusations against radio host



/ ChatGPT is notorious for generating false and misleading information, but this seems the first defamation case filed against creator OpenAI.

Grok AI falsely accuses NBA star of vandalism spree

In an April 2024 post on X, Grok, the AI chatbot from Elon Musk's xAI, falsely accused NBA star Klay Thompson of throwing bricks through windows of multiple houses in Sacramento, Ca.

Some commentators speculated that Grok may have hallucinated the vandalism story about the Golden State Warriors star after ingesting posts about Thompson's off-court antics and a missed shot. In his final game with the Warriors, Thompson had his worst postseason performance.

Air Canada must pay damages after chatbot lies to grieving passenger about discount

Airline tried arguing virtual assistant was solely responsible for its own actions

 Katyanna Quach

Thu 15 Feb 2024 // 21:50 UTC

Air Canada must pay a passenger hundreds of dollars in damages after its online chatbot gave the guy wrong information before he booked a flight.

Jake Moffatt took the airline to a small-claims tribunal after the biz refused to refund him for flights he booked from Vancouver to Toronto following the death of his grandmother in November last year. Before he bought the tickets, he researched Air Canada's bereavement fares – special low rates for those traveling due to the loss of an immediate



AI Literally

AI can be literal without the proper grounding and prompt engineering.



Salesforce Best Practice

Agentforce guardrails: The Agentforce framework itself includes mechanisms like topic-based limitations and harm/toxicity detection to prevent agents from engaging in inappropriate or malicious conversations.



What is Unstructured Data?

Unstructured Data: Unstructured data is data that is not organized in a structured format, such as text, images, audio, or video. It can be difficult to analyze and can often contain valuable information that can be used to improve decision-making.

90% of data will be unstructured by 2028. — [InfoWorld](#)

- Text Messages
- Emails
- Social Media Posts
- Sensor Data
- Audio Recordings
- Images
- Transcripts
- Videos

Prompt Template Engineering

Use clear, simple, conversational language.

Role-play characters to provide contextual prompts.

Test, tweak, and get feedback on prompts.

Use a consistent style for reliable output.

Give clear instructions to guide output format.

Start with a template, then customize language.

Best Practices for Building Prompt Templates



What we are going to do

1. Ensure Agentforce is enabled in the Org
2. Upload Release Notes to the Salesforce Agentforce Data Library
3. Look at the Vector Data Lake Object in Salesforce
4. Create a grounded Prompt in Salesforce
5. Use the Agent Builder to add a topic, review and preview
6. Test in Salesforce



Enabling Agentforce

The screenshot displays the Salesforce Setup Home interface. At the top, there's a navigation bar with tabs for Setup, Home, and Object Manager. A search bar labeled 'Search Setup' is positioned on the right. Below the navigation bar, a left-hand sidebar contains a 'Quick Find' search box and a list of setup categories including Setup Home, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, and ADMINISTRATION. The main content area features a 'SETUP Home' header with a 'Create' button. Below this, three prominent cards are visible: 'Data Cloud' with a 'Watch Video' link and a 'Let's Go' button, 'Get Started with Einstein Bots' with a 'Get Started' button, and 'Mobile Publisher' with a 'Learn More' button. At the bottom of the main area, a 'Most Recently Used' section lists 10 items in a table format.

NAME	TYPE	OBJECT
Robert Davis	User	
SFDC_DevConsole	Debug Level	

Setting Up Data Cloud

The screenshot displays the Salesforce Data Cloud Setup interface. The top navigation bar includes a search bar labeled "Search Setup" and a "Data Cloud Setup" header. The left sidebar contains a "Quick Find" search bar and a navigation menu with categories: "USER MANAGEMENT" (including Permission Sets and Users), "FEATURE MANAGEMENT" (including Data Spaces and Feature Manager), "SALESFORCE INTEGRATIONS" (including Data Cloud One, Salesforce CRM, Marketing, and Commerce Cloud), and "EXTERNAL INTEGRATIONS". The main content area is titled "Users" and shows the profile for "OrgFarm EPIC". The profile includes a "User" header, a "User Profile Help for this Page" link, and a list of links for various settings. Below this is a section for "Authentication Settings for External Systems" with a "New" button and a "No records to display" message. The bottom section is a table of user attributes.

Alias	OEPIE	User License	Salesforce
Email	epic.orgfarm@salesforce.com [Verify] [i]	Profile	System Administrator
Username	epic.4acbc4e9802a@orgfarm.com	Active	✓
Nickname	User17415326413768802213 [i]	Marketing User	✓
Title		Offline User	✓
Company	EPIC OrgFarm	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	✓
Address	United States	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	[i]
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>

Uploading Release Notes

The screenshot displays the Salesforce Setup Home interface. At the top, there's a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. A search bar labeled 'Search Setup' is positioned to the right. Below the navigation bar, a left-hand sidebar contains a 'Quick Find' search bar and a list of navigation items including 'Setup Home', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Field Service Setup Home (Beta)', 'Hyperforce Assistant', 'Release Updates', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'Sales Cloud Everywhere', 'ADMINISTRATION' (with sub-items 'Users', 'Data', 'Email'), and 'PLATFORM TOOLS' (with sub-item 'Subscription Management').

The main content area is titled 'SETUP Home' and features three prominent tiles:

- Data Cloud**: Connect, prepare, harmonize, unify, and analyze data to get a 360-degree view of your customers. Includes buttons for 'Watch Video' and 'Let's Go'.
- Get Started with Einstein Bots**: Launch an AI-powered bot to automate your digital connections. Includes a 'Get Started' button.
- Mobile Publisher**: Use the Mobile Publisher to create your own branded mobile app. Includes a 'Learn More' button.

Below these tiles is a section titled 'Most Recently Used' showing 2 items in a table:

NAME	TYPE	OBJECT
OrgFarm EPIC	User	
Robert Davis	User	

Creating a Prompt Template

New Prompt Template

Select the type of prompt template to build. Based on the template type, define the resources available for the template. [Learn more in Salesforce Help.](#)

* Prompt Template Type ⓘ

Flex

* Prompt Template Name

Release Notes QA

* API Name

ReleaseNotesQA

Template Description

Answering Release Notes questions

Define Sources

Define up to 5 sources for your flex template. Assign a unique label, API name, source type, and object, as applicable. Keep in mind that you can't associate an object with String source types.

1.

* Name

varTxtQuestion

* API Name

varTxtQuestion

* Source Type ⓘ

Free Text

Add Resources

Cancel

Next

A cartoon illustration of a brown armadillo with a long snout and small ears, positioned on the right side of the slide.

The logo for "Texas dreamin'" features a stylized white star inside a blue cloud-like shape, with the text "Texas dreamin'" in a white, cursive font below it.

Prompt Template Text

Your role is as a **Salesforce Release Notes subject matter expert**.

Your task is to answer user questions based on the Salesforce Release Notes in a clear, concise, and helpful manner. The user question will be provided in the variable: `{!$Input:varTxtQuestion}`

Instructions for Response

1. Clarity & Tone

- Use plain language — be direct and simple.
- Avoid technical jargon unless it appears in the Release Notes.

2. Reference the Release Notes

- Reference the Release Period such as Summer '25 where applicable.
- Reference the specific section of the Release Notes where applicable.
- When available, include a *URL* to that section.

3. Structure

- Use **bullet points** to highlight key updates, features, or changes.
- Add **detailed paragraphs** to explain context or implications.
- Only include **code examples** or **step-by-step instructions** if they are explicitly included in the Release Notes.

4. No Relevant Information Found

- If nothing relevant is found, respond with:

No information concerning your question could be located: `{!$Input:varTxtQuestion}` in the current Release Notes.



Navigating Agent Builder Prompt

Prompt Template Workspace ⓘ

- Reference the Release Period such as Summer '25 where applicable.
- Reference the specific "section" of the Release Notes where applicable.
- When available, include a "URL" to that section.

3. **Structure**

- Use **bullet points** to highlight key updates, features, or changes.
- Add **detailed paragraphs** to explain context or implications.
- Only include **code examples** or **step-by-step instructions** if they are explicitly included in the Release Notes.

4. **No Relevant Information Found**

- If nothing relevant is found, respond with:
...

No information concerning your question could be located: `Input:varTxtQuestion` in the current Release Notes.

Resource ⓘ

Search for or select a resource to insert...

Resources

Flows (None Available)

Apex (None Available)

Einstein Search ⓘ >

Current Organization >

Current User >

Free Text >

Preview

Resolution ⓘ

Review how prompts and resources for the selected records are resolved from the template. For each merge field resource, all associated CRM field values are included for the selected records. For each flow resource, Einstein displays the generated response.

Response ⓘ

Compare the prompt resolution with the generated response, and then revise your prompt template as needed. Each time you revise your template and regenerate the prompt preview, Einstein displays an updated prompt resolution and response. Repeat this process until you have an effective and safe prompt and response.

Generative AI can produce inaccurate or harmful responses. Review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

Configuration

Template Properties

Test Inputs

* Model Type ⓘ
Standard ▼

* Models ⓘ
OpenAI GPT 4 ▼
[View this model](#) ↗

> Model Limitations

Response Language Settings

By default, the prompt responses will generate in the executing user's language. [Learn more in Salesforce Help.](#)

Allowed Response Language(s) ⓘ
10 options selected 🔍

Editing Prompt Template

The screenshot shows the Salesforce Prompt Builder setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar labeled 'Search Setup' is on the right. Below the navigation bar, a left sidebar contains a search bar 'Prompt' and a menu with 'Einstein' and 'Einstein Generative AI' expanded, showing 'Prompt Builder' as the selected option. A message in the sidebar says 'Didn't find what you're looking for? Try using Global Search.' The main content area has a header 'SETUP Prompt Builder' with a 'New Prompt Template' button. Below this is a section 'Explore Prompt Builder' with three cards: 'Get to Know Prompt Builder' (with a 'Watch Video' button), 'Build Your Knowledge' (with a 'Learn' button), and 'Take a Tour of Prompt Builder' (with a 'Start Tour' button). At the bottom, there's a section 'Prompt Templates' with 'All Prompt Templates' and '3 items', and a search bar 'Search templates...'.

Search Setup

Setup Home Object Manager

Search Prompt

▼ Einstein

▼ Einstein Generative AI

Prompt Builder

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

To display Prompt Builder usage and feedback metrics, enable Feedback Data. [Go to Einstein Collect and Store Data settings.](#)

SETUP Prompt Builder

New Prompt Template

▼ Explore Prompt Builder

Get to Know Prompt Builder

Discover how Prompt Builder helps to scale the power of prompts across Salesforce clouds.

Watch Video

Build Your Knowledge

Learn more and get help with prompts, templates, and Prompt Builder.

Learn

Take a Tour of Prompt Builder

Get a demo of the process of building a prompt template.

Start Tour

Prompt Templates

All Prompt Templates

3 items

Search templates...

Setting Up a Topic

The screenshot displays the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup" and a navigation bar with "Setup", "Home", and "Object Manager". Below the navigation bar is a "Quick Find" search box. The left sidebar lists various setup options: Setup Home, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Subscription Management). The main content area is titled "Agents" under the "SETUP > AGENT STUDIO" breadcrumb. It features a toggle for "Agentforce" which is turned "On" and a "+ New Agent" button. Below this, there's a section titled "Get to Know Agent" with three cards: "Hit the Trail with Agents" (with a "Go to Trailhead" button), "Customize Agents with Actions" (with a "Go to Blog" button), and "Succeed with Documentation" (with a "Go to Help" button). At the bottom, there's a section "Enable the Agentforce (Default) Agent" with a description and a toggle that is also turned "On".

Setup

Home

Object Manager

Search Setup

Quick Find

Setup Home

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

SETUP > AGENT STUDIO

Agents

Agentforce ☒ On

+ New Agent

Get to Know Agent

Hit the Trail with Agents

Follow along with an admin as they explore what makes agents tick and launch an agent for their business.

Go to Trailhead

Customize Agents with Actions

Actions are how an agent gets things done. Learn how to create agent actions tailored to your business needs in the Salesforce Admins Blog.

Go to Blog

Succeed with Documentation

Salesforce Help has all the info you need to customize, test, and activate an agent for your use cases.

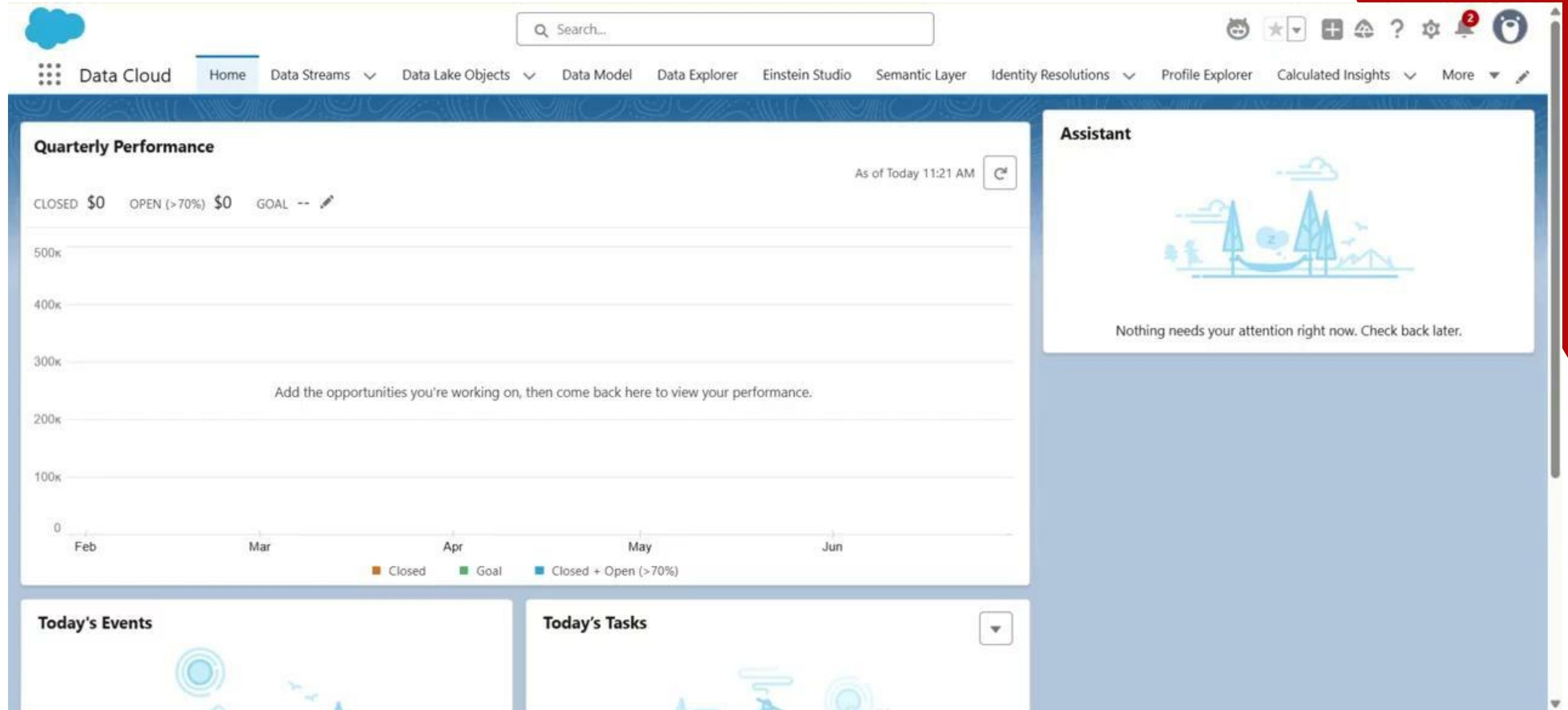
Go to Help

Enable the Agentforce (Default) Agent

Help your employees accomplish key business tasks in Salesforce and Slack with the default AI assistant for Salesforce CRM.

☒ On

Chatting with an Agent



Thank You!

Robert Davis

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LinkedIn: <https://bit.ly/3XcyG5d>

Questions?



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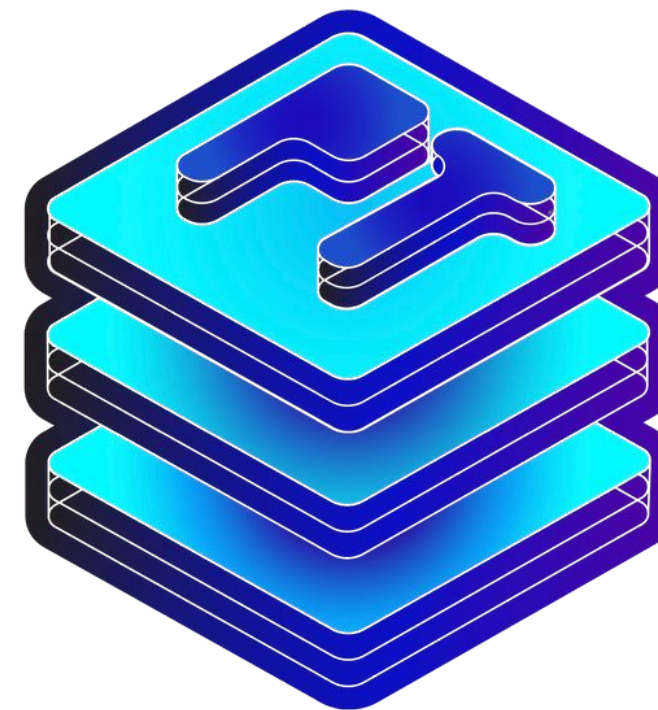


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Resources

- [Best Practices for Building Secure Agentforce Service Agents](#)
- [Quick Start: Build a Service Agent with Agentforce](#)
- [Unstructured Data Guide: What It Is, Use Cases, and Benefits](#)
- [Agentforce and Unstructured Data = Yes!](#)
- [Best Practices for Building Prompt Templates](#)
- [Examples of Good vs. Bad Prompts](#)
- [20 bad prompts to avoid when seeking information](#)
- [Udemy - Course: Build a Salesforce Agent to Chat with unstructured PDF Data](#)