salesforce

GUIDE

Augment Your Agentforce with Prompt Builder
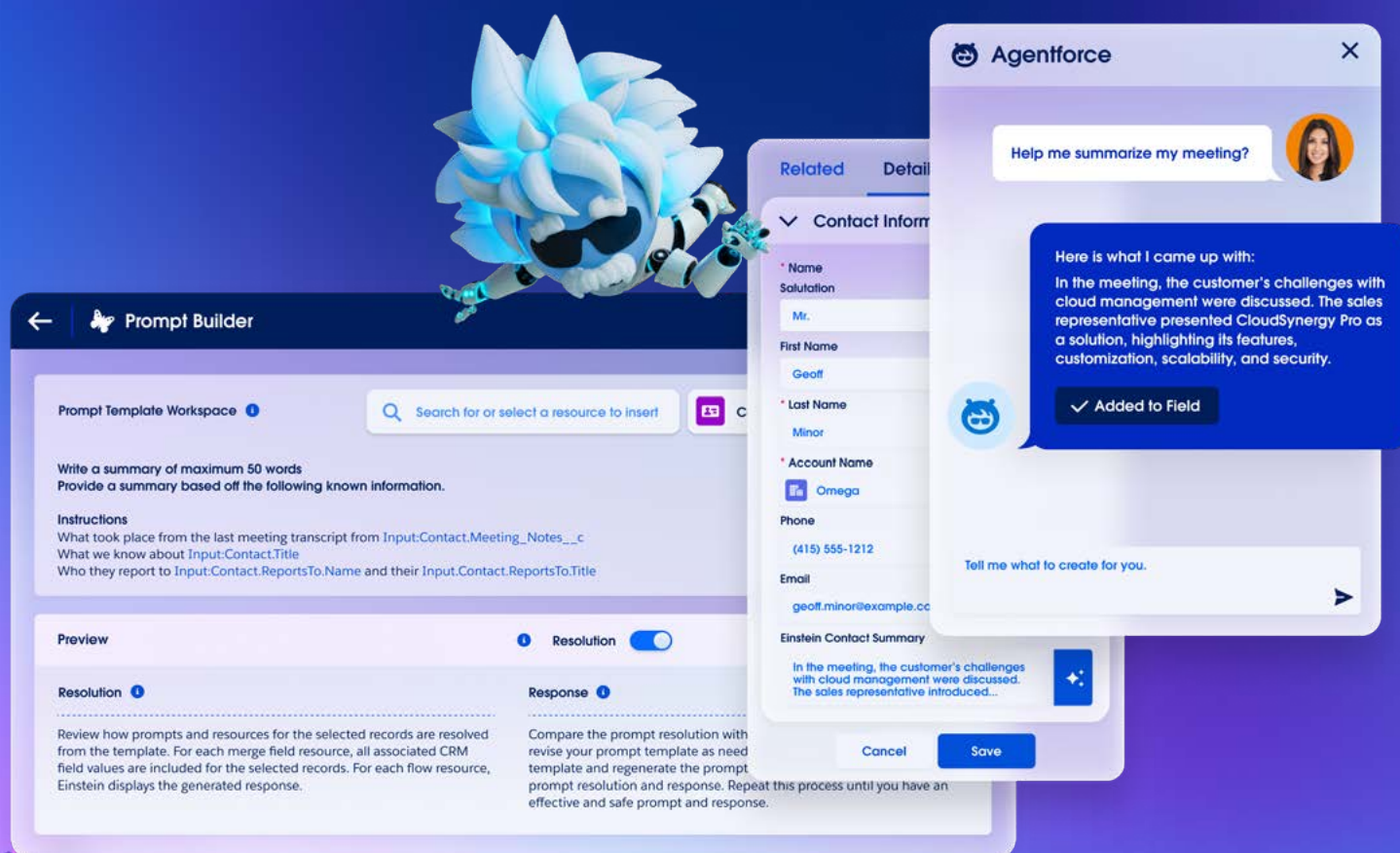
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Introduction

Deliver on the Promise of Generative AI

Many businesses are already seeing the benefits of generative AI. IDC data shows that AI-powered cloud solutions help employees reduce repetitive tasks to do their jobs better. They help the business boost productivity, improve the customer experience, increase revenue, and lower the cost to acquire, retain, or service customers.[1]

Yet many companies still struggle with putting it into practice. They're unable to create AI-powered experiences quickly, have difficulty embedding generative AI into existing processes or scaling new AI agents, and lack trust in the results.

AI-powered cloud solutions[1]

62% Improve customer-facing employee productivity

61% Improve customer experience

50% Increase Revenue

56% of workplace AI users say it's difficult to get what they want out of AI*.

*Salesforce Your Data, Your AI Research, April 2024

Salesforce is solving these challenges with Agentforce: a new layer on the Salesforce Platform that enables companies to build and deploy your Agentforce to autonomously take action across any business function. Along with its suite of pre-built agents, Agentforce comes with a set of low-code builders that helps businesses customize agents and create powerful actions tailored to their workflow and data. While Agentforce Builder allows customers to define new jobs to be done for agents, **Prompt Builder** is another key component of Agentforce.

Prompt Builder allows your organization to create reusable prompt templates that supercharge every agent and workflow with generative actions.

This guide will walk you through how to create these prompt-driven actions using Prompt Builder.

Let's dive in.

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[1] Salesforce Economic Impact Survey, IDC, December, 2023

What is Prompt Builder?

What you need to know about prompts:

For generative AI to deliver reliable and **trusted** content, you need well-formulated prompts – a detailed set of instructions that communicates with the large language model (LLM) behind the AI technology

But it's a challenge to create, integrate, and manage prompts across the business.

Generative AI Challenges to be Solved:

- There is no simple way to build generative AI solutions that are scalable for all users across your business without creating unique prompts for every use.

- One of the thorniest issues is adding business context and data into prompts to generate accurate and meaningful results to users, while protecting your customer data and internal IP.

- Generative experiences are only powerful when easily integrated across every customer touchpoint, embedded within workflows and agent interfaces.

How Prompt Builder Helps

Prompt Builder makes it easy for admins to create prompts that are customizable and reusable across the Salesforce Platform. Not only does it integrate generative AI into your workflows, it enhances your Agentforce with prompt actions. With prompt templates, you can customize agent actions to use LLMs for tasks like knowledge search, summarization, sentiment analysis, and content creation.

Requirement	How Prompt Builder Helps
Build solutions that can scale, instead of each user recreating the same LLM interaction manually.	**Build generative experiences with ease.** Streamline building prompts by empowering Salesforce admins to create prompt templates that summarize and generate content with clicks.
Build prompts that are personalized using your data, avoiding the generic output of public generative AI models.	**Enrich prompts with your data.** Create more relevant prompts grounded in your business data from CRM, Data Cloud, and external sources. Retrieve data dynamically using RAG or based on advanced logic with Flow Builder.
Protect your customers' data and internal IP.	**Secure your prompts.** Build, test, and fine-tune trusted AI prompts within the Einstein Trust Layer in order to mask any sensitive information and limit bias and toxicity.
Integrate generative experiences across every touchpoint without rebuilding.	**Embed in Agentforce and workflows.** Build prompt templates once and scale generative experiences across record pages, Flow, or Agentforce actions.

Writing Effective Prompts for Every Experience

Creating a good AI-powered experience in your CRM starts with effective prompts. Here are some of the key components of setting up a good prompt for your business workflow.

Lifecycle of a Prompt Template

1

Create prompts grounded with your data

Design reusable and effective prompts that are grounded in your own business data, secured within the Einstein Trust Layer.

- CRM Data
- Prompt Flows
- Data Cloud

2

Test and iterate on prompt templates

Test the output of the prompts with real data and version control. Refine prompts and choose the best LLM for the job.

- Test with real data
- Version control
- LLM Selection

3

Activate prompts in the flow of work

Call prompt templates to supercharge productivity within the flow of work including Agentforce.

- Email
- Field
- Flow
- Apex
- LWC
- C360
- Agentforce

Writing Effective Prompts for Every Experience

1 **Create effective prompt templates.**

Good prompts start with good grounding data. Grounding is the process of providing the LLM your specific domain knowledge and context, such as Salesforce data, to get your desired response. Without grounding, a model's response may contain generic, irrelevant, or hallucinated details.

With Prompt Builder, you can ground prompt templates with Salesforce, Data Cloud data, and even external data. This connection helps the LLM understand context to generate personalized responses with current and precise information. You can even retrieve data dynamically using Retrieval-Augmented Generation (RAG) methods or logic built in Flows. Confidential data and PII remains within Salesforce. The zero-retention agreement within the Einstein Trust Layer guarantees that any information shared with the LLM is neither stored nor used for training purposes.

Here are some of the elements of a high-quality prompt template:

Elements of a high-quality prompt template.

Who is involved, and how are they related?
Key Ingredients: Participants, relationships, data

Example:
You are a banker named {!user.firstname} {!user.lastname} from a company named Sample Bank.

You are writing to {!account.name}, who has been a customer of yours since {!account.creationdate}

What is the context?
Key Ingredients: Setting, tone & style, language

Example:
Write the message in the form of an email directed toward a single individual, written in English.

The message should evoke enthusiasm with intensifiers, but limit the use of exclamation points. Express casualness using contractions, referring to the recipient in second person, and using discourse markers.

What are you trying to accomplish?
Key Ingredients: Goal, instructions

Example:
You are attempting to persuade {!account. name} to sign up for {!product.name}, which is described as {!product.description}.

Describe the business value of {!product.name} in the context of banking clients who are {!account.status}.

What are the constraints?
Key Ingredients: Limits, instructions

Example:
Limit the message to about 500 words, and do not address any content or generate answers that you don't have complete data on.

Follow these instructions strictly to generate only the message to be sent to the customer.

# Writing Effective Prompts for Every Experience

2   Test and iterate on prompt templates.

Generative AI uses LLMs to produce responses. Unless you have the resources to train your own models, third-party LLMs are not tuned to achieve great results for unique business needs, even if your prompt is well-defined.

Prompt Builder makes it easy to refine your prompts without needing to finetune the model. Refine your prompts by either adding additional grounding data or selecting a different LLM. For example, you may choose different LLMs for creating marketing copy than a legal document. The results from your prior attempts are not retained and the new output takes its place, but a version of the previous prompt template is saved should you need it.

3   Activate prompts in your Agentforce and workflows.

The final step of a generative AI experience is to deploy the experience right in the flow of work. This can be enhancing existing workflows by embedding prompt templates in record pages using Lightning App Builder, Flows, or Apex. You can also invoke prompt templates within Agentforce Builder and leverage the same prompt you built as a prompt action within Agentforce.
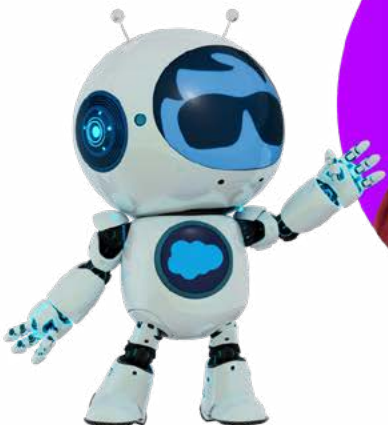
> "
> **Prompt Builder allows our team at Carnegie Learning to bring our CRM data into our prompts easily with no code! This helps us augment our business processes to cut down on service rep response, email outreach, and content generation time"**
>
> **Marissa Scalercio**
> **VP of Sales Operations,**
> **Carnegie Learning**

CARNEGIE LEARNING

Common Use Cases of Prompt Builder

Now that you know the basics of writing effective prompts, let's take a look at a few common use case patterns of Prompt Builder that will help you put AI to work more effectively.

Summarize and Generate Content

Because LLMs are designed to recognize the connection between natural language words, they excel at inferring a text output based on some text input. Some general examples of prompt capabilities include:

- **Summarizing a large set of information**
- **Generating new content**
- **Translating a body of text**

Prompt Builder allows you to easily and safely provide grounding data – specific domain knowledge and context, such as CRM data – to perform summarization and content generation tasks with the most relevant business context.

By providing contextual grounding data, you can go far beyond having AI simply cut down blocks. For example:

- **Surface insights such as purchase behavior**
- **Suggest next steps**
- **Include personal details in comms**

📈 **Use Case**

Context-Rich Emails at Scale
Objective: Increase sales productivity to reduce deal cycles and improve accuracy of interactions.

Solution:
Build a prompt to automatically create personalized, relevant emails grounded on your private data. Incorporate all the ingredients that make a prompt template great: instructions, participants, conditions, goals, relationships, constraints, and most importantly, context from your CRM data about you, your product focus and your customer.

💗 **Use Case**

Augmented Contact Summaries
Objective: Empower service and support agents with deeper knowledge.

Solution:
Build a prompt to auto-generate summaries, descriptions, and other field values grounded on opportunity and case data. Without needing to open every record page and review contact and opportunity details across every related record, generative summaries can equip agents with valuable insights in seconds.

Common Use Cases of Prompt Builder

Call Prompt Templates in Agentforce

Agentforce takes generative experiences to the next level with autonomous agents that can act on your team's behalf. The Atlas Reasoning Engine understands the user request and plots a course of action based on the user intent. Agentforce supports all types of actions built as part of the Salesforce Platform, including Flow, Apex, and now prompt template-driven actions.

Because agents adapt based on the conversation, it's especially good at multi-step workflows where a solution requires multiple actions, such as troubleshooting a support case and resolving the root issue for the customer.

♥ Use Case

Self-Service Returns

Objective: Enable customer self-service to process complex returns.

Solution:
A customer can ask Agentforce to process a complex return without needing a representative approval. Once it looks up the customer's purchase history, it calls a custom prompt template that reviews the customer's purchase records and delivers a return approval recommendation. Then Agentforce can start the return process with the help of a Flow custom action.

📈 Use Case

Streamlined Sales Pitches

Objective: Enable sales reps to identify top opportunities and streamline the sales pitch process.

Solution:
A sales rep can ask Agentforce to identify top opportunities by leveraging the record summary prompt action. Once top accounts are identified, the next action is to create sales pitches to them. Agentforce can also generate a sales pitch using a prompt template designed to help craft the right messaging based on previous conversations and case history.

Common Use Cases of Prompt Builder

Enhance Automation with Generative AI

Automation helps companies streamline processes and free up valuable employee time from working on repetitive manual tasks. Prompt Builder takes it a step further, enabling you to combine generative AI with automated workflows. For instance, using a record-triggered flow, you can trigger a prompt template to run automatically when a record is created or updated. Another way where generative AI can enhance automation is by embedding it directly in a screen flow to help generate the desired output when called upon.

💗 **Use Case**

Automated Case Summary
Objective: Ensure case summaries are up to date.

Solution:
Start by building a case summary prompt template that provides a snapshot of all the open cases associated with an account. Using a record-triggered flow, run the case summary prompt template to automatically update generated summaries whenever new case detail is submitted.

💗 **Use Case**

Guided workflow to generate product recommendations
Objective: Generate different recommendations for each selected product.

Solution:
Start by building a prompt template that generates a product recommendation based on a customer's purchase and case history data. Using a widget powered by a screen flow that launched off an Account record page, a Service agent can select a customer using a lookup field and get tailored product recommendations served up by the prompt template.

> **Prompt Builder has allowed us to safely build generative AI experiences that save our users precious time, while still keeping our data secure and inside of our org."**
>
> **Andrew Russo**
> Salesforce Architect,
> BACA Systems
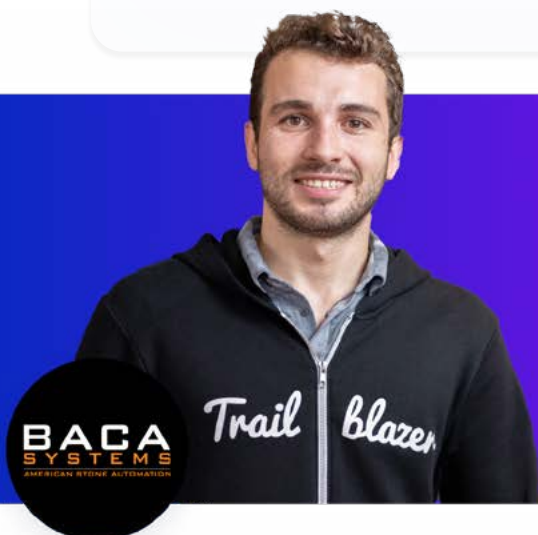
Common Use Cases of Prompt Builder

Create AI-Assisted Applications

You can also use Prompt Builder to create and deploy custom AI-powered apps across your organization. Because prompt templates can be invoked in Lightning Pages, Flows, Apex and even custom UI using Lightning Web Component, you can create an app for any scenario – even beyond your CRM users. IT, admins, and developers can collaborate with business teams to build productivity applications that natively embeds Salesforce AI.

The Salesforce Platform provides you with the low-code tools to build, test, and optimize custom AI experiences that are grounded in your data. And Salesforce keeps you and your customers secure and compliant with leading security, governance, and privacy tools.

⚡ Use Case

HR: Recruiting & Application Tracking
Objective: Improve the efficiency of the job application and interviewing process and eliminate costly, manual cycles spent filling open job positions.

Solution:
Create an HR recruiting portal with Prompt Builder and Experience Cloud. First, use Prompt Builder to build a prompt template that summarizes job applications into a brief overview of the candidate's background. Second, create a prompt template that generates specific interview questions based on candidate applications, job requirements, and company values. Last, create a prompt template that summarizes all the interviewer feedback to define next steps.

Finally, surface all of these generated outputs in a custom Lightning Web Component that embeds in the recruiting portal, powered by Experience Cloud.

⚡ Use Case

Professional Services: Project Management
Objective: Streamline the manual, redundant tracking in project planning, collaboration, and post-sale execution

Solution:
Develop an AI-powered project management application featuring App Builder, Prompt Builder and Flows. Automatically initiate a new project, upon opportunity close, using Flow Builder. Leverage Prompt Builder to extract contract requirements from Sales Cloud objects, like Accounts and Opportunities, and integrate these details into your new project management application. Use Prompt Builder templates to formulate a summarized resource plan. As the project progresses, employ Prompt Builder templates to automatically generate change requests, notify the relevant team members, and compile milestone summaries to ensure everyone is informed and aligned.

CONCLUSION

Get Started Today

Generative AI has great potential for your business, and with Prompt Builder your teams can reach your specific desired results faster. Now that you've seen the basics of creating effective prompts and Prompt Builder's capabilities, you're ready to dive deeper into the possibilities with these resources:

Resources

Prompt Builder Demo

Trailhead – Prompt Builder Templates Superbadge

Trailhead - Quick Start: Prompt Builder

How Agents Can Take Smarter Actions with Prompt Builder

📞 **Talk to an Expert**