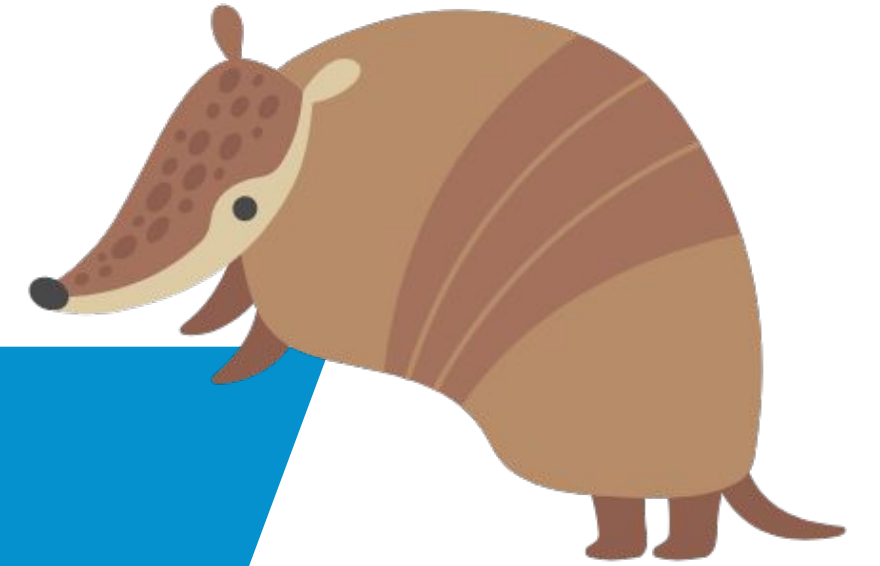




Unlocking the Power of Unstructured Data for AI Agents

**Presentation by
Robert Davis**

OUR SPEAKER



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The Power and Peril of Unchecked Intelligence

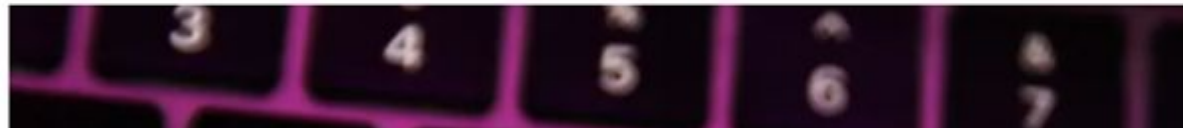
AI at Full Speed, No Seatbelt

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

Grok AI falsely accuses NBA star of vandalism spree

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.

It is speculated that Grok may have hallucinated the vandalism story about the Golden State Warriors player, who has since been traded to the Dallas Mavericks, after ingesting posts about the "bricks through the windows" meme.

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

Airline tried arguing virtual assistant was solely responsible for error

 [Katyanna Quach](#)

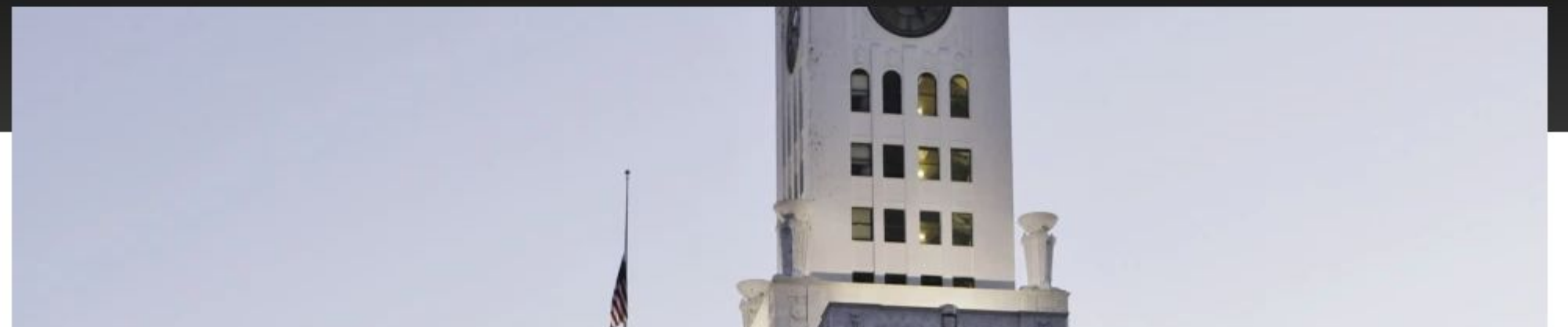
Thu 15 Feb 2024

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 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 family member.

TECHNOLOGY

Fictional fiction: A newspaper's summer book list recommends nonexistent books. Blame AI



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 sidebar contains a 'Quick Find' search box and a list of setup categories: 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 features a 'SETUP Home' header with a 'Create' button. Below this, three 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, a 'Most Recently Used' section lists 10 items in a table.

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 various utility icons. The left sidebar contains a 'Data Cloud Setup' menu with sections for 'USER MANAGEMENT' (including 'Users'), 'FEATURE MANAGEMENT', 'SALESFORCE INTEGRATIONS', and 'EXTERNAL INTEGRATIONS'. The main content area is titled 'Users' and shows the setup for a specific user, 'OrgFarm EPIC'. Below the user name, there are links for various setup areas like 'Permission Set Assignments', 'Queue Membership', 'Team', 'Managers in the Role Hierarchy', 'OAuth Apps', 'Third-Party Account Links', 'Installed Mobile Apps', 'Authentication Settings for External Systems', and 'Login History'. The 'Authentication Settings for External Systems' section is currently active, showing a table of user licenses and their associated roles. The table has columns for 'Alias', 'Email', 'Username', 'Nickname', 'Title', 'Company', 'Department', 'Division', 'Address', 'Time Zone', 'Locale', 'Language', 'Delegated Approver', 'Manager', 'User License', and 'Salesforce'. The user 'OrgFarm EPIC' is listed with a 'Salesforce System Administrator' license. The table also shows various user roles like 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', and 'Data.com User Type'.

Data Cloud Setup | Home | Object Manager

Users

User: **OrgFarm EPIC**

[Permission Set Assignments](#) (5) | [Permission Set Assignments Activation Required](#) (0) | [Permission Set Group Assignments](#) (0) | [Permission Set License Assignments](#) (3) | [Personal Groups](#) (0) | [Public Group Membership](#) (0) | [Queue Membership](#) (0) | [Team](#) (0) | [Managers in the Role Hierarchy](#) (0) | [OAuth Apps](#) (2) | [Third-Party Account Links](#) (0) | [Installed Mobile Apps](#) (0) | [Authentication Settings for External Systems](#) (0) | [Login History](#) (7+) |

Authentication Settings for External Systems [New](#) [Authentication Settings for External Systems Help](#)

No records to display

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

Uploading Release Notes

The screenshot shows the Salesforce Setup Home interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A search bar labeled 'Search Setup' is on the right. Below the navigation bar, a left sidebar contains a 'Quick Find' search bar and a list of setup categories: 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 features a 'SETUP Home' header with a 'Create' button. Below this is a carousel of three setup guides: 'Data Cloud' (with 'Watch Video' and 'Let's Go' buttons), 'Get Started with Einstein Bots' (with a 'Get Started' button), and 'Mobile Publisher' (with a 'Learn More' button). At the bottom, a 'Most Recently Used' section lists 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, pointed snout and a small tail, 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.



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', with 'Prompt Builder' selected. The main content area has a header 'SETUP Prompt Builder' with a 'New Prompt Template' button. Below this is an 'Explore Prompt Builder' section 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 'Prompt Templates' section titled 'All Prompt Templates' showing '3 items' and a 'Search templates...' input field. An orange banner at the top of the main content area reads: 'To display Prompt Builder usage and feedback metrics, enable Feedback Data. Go to Einstein Collect and Store Data settings.'

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 🔍

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 bar. 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 "SETUP > AGENT STUDIO Agents". 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.

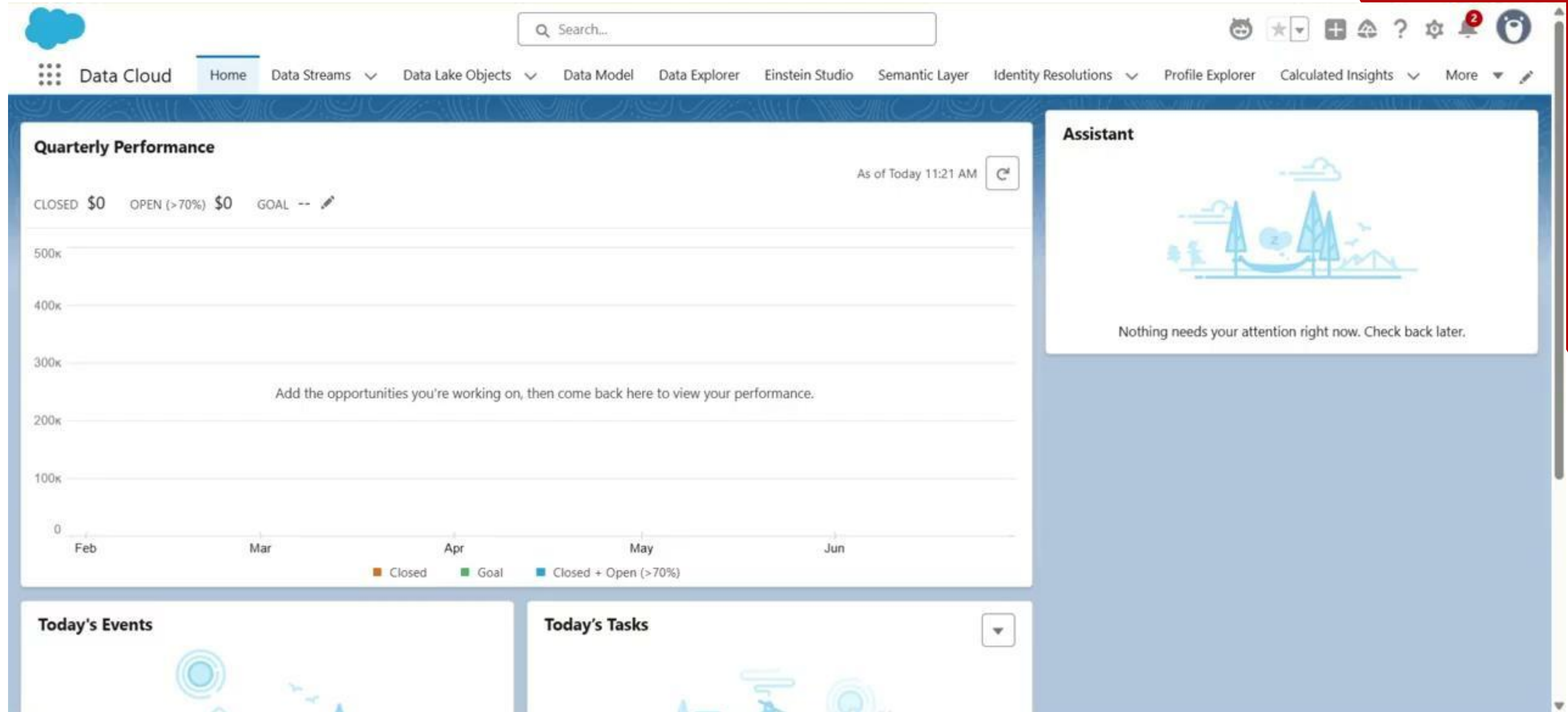
Go to Help

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**
Salesforce Solution Architect, Hike2

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

Slides at: <https://bit.ly/3Hilu8m>



Questions?



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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](#)