

AI Specialist





Bassem Ismaiel

Senior Salesforce Architect
Founder Yalla Salesforce

[Linkedin](#)

[Youtube](#)

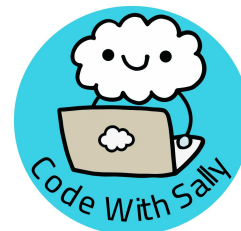


Sally Elghoul

Lead Salesforce Developer
Founder Code with Sally

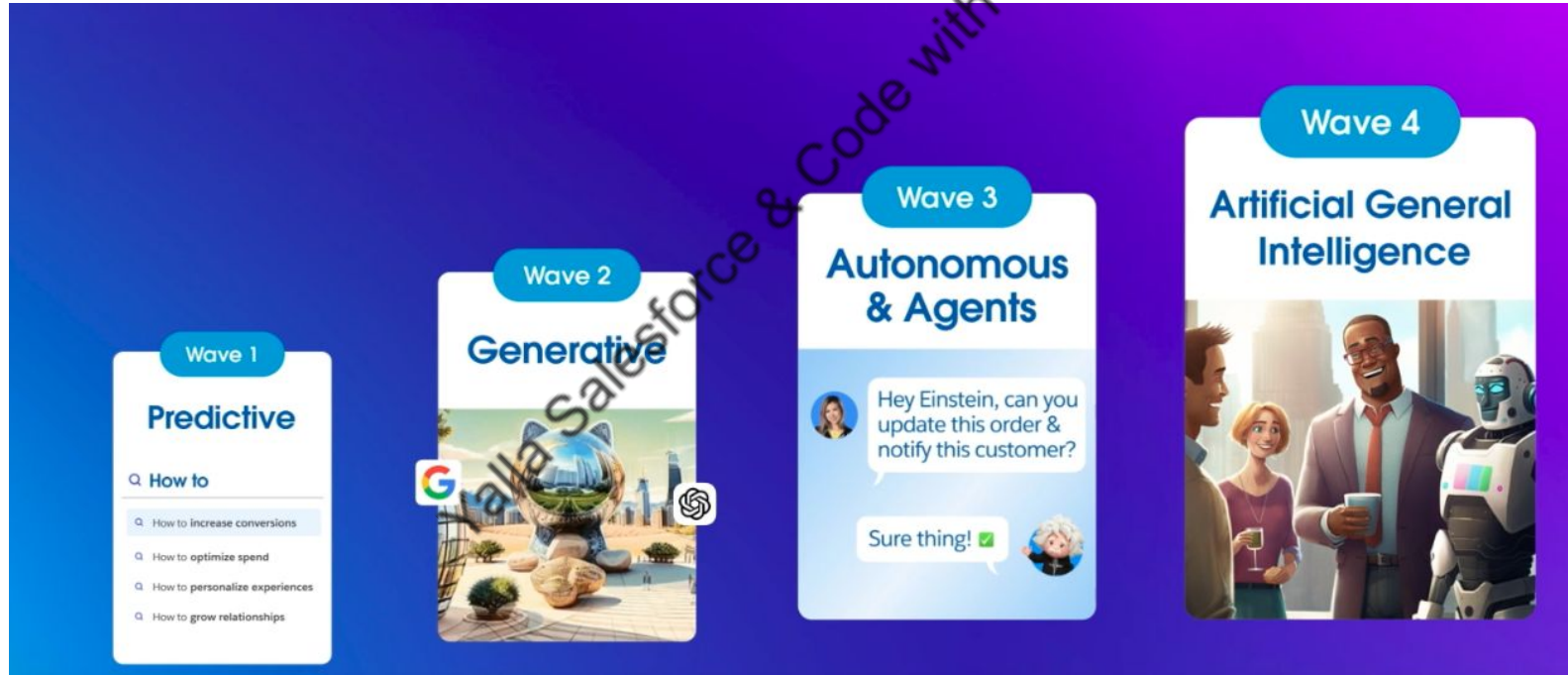
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[Youtube](#)



Artificial Intelligence (AI)

Artificial Intelligence, refers to the development of machines and systems that can mimic human intelligence to perform tasks like learning, reasoning, and problem-solving.



AI Certifications



[AI Associate Exam Guide](#)

[AI Associate Trailmix](#)



[AI Specialist Exam Guide](#)

[AI Specialist Trailmix](#)



[CRM Analytics and Einstein
Disc. Exam Guide](#)

[CRM Analytics and Einstein
Disc. Trailmix](#)

[Improve Outcomes with
Einstein Discovery Trail](#)

Yalla Salesforce & Code with Sally

AI Specialist



Einstein Trust Layer: 15%

- Identify the security, privacy, and grounding features of the Einstein Trust Layer.
- Implement and manage the Einstein Trust Layer.

Generative AI in CRM Applications: 17%

- Given a scenario, identify the correct generative AI feature in Einstein for Sales.
- Given a scenario, identify the correct generative AI feature in Einstein for Service.

Prompt Builder: 37%

- Given business requirements, identify when it's appropriate to use Prompt Builder.
- Identify the right user roles to manage and execute prompt templates.
- Identify the considerations for creating a prompt template.
- Given a scenario, identify the appropriate grounding technique.
- Explain the process for creating, activating, and executing prompt templates.

Einstein Copilot: 23%

- Given business requirements, identify when it's appropriate to use Einstein Copilot.
- Explain how the large language model (LLM) identifies and executes a copilot action.
- Leverage standard copilot actions and create custom copilot actions.
- Manage and monitor Copilot adoption.

Model Builder: 8%

- Given business requirements, identify when it's appropriate to use Model Builder.
- Configure standard, custom, and Bring Your Own Large Language Model (BYOLLM) generative models.



Foundation

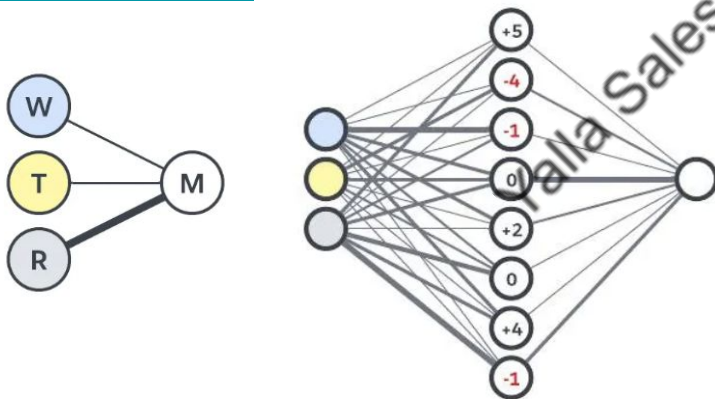
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Predictive

Type of machine learning that trains a model to make predictions or decisions based on data.



Neural Networks



Predicted Time to Close

1 **29.5 days to close**

2 **Top Predictors**

- ↻ 2.02 Competitor Type is **Known** and Route To Market is **Reseller**
- ↻ 1.43 Deal Size Category is 5.0 and Supplies Subgroup is **Car Electronics**
- ↻ 1.16 Deal Size Category is 5.0

3 **How To Improve This**

- ✓ -3.48 Set Supplies Group to **Car Accessories**
- ✓ -3.48 Set Supplies Group to **Car Electronics**

Generative

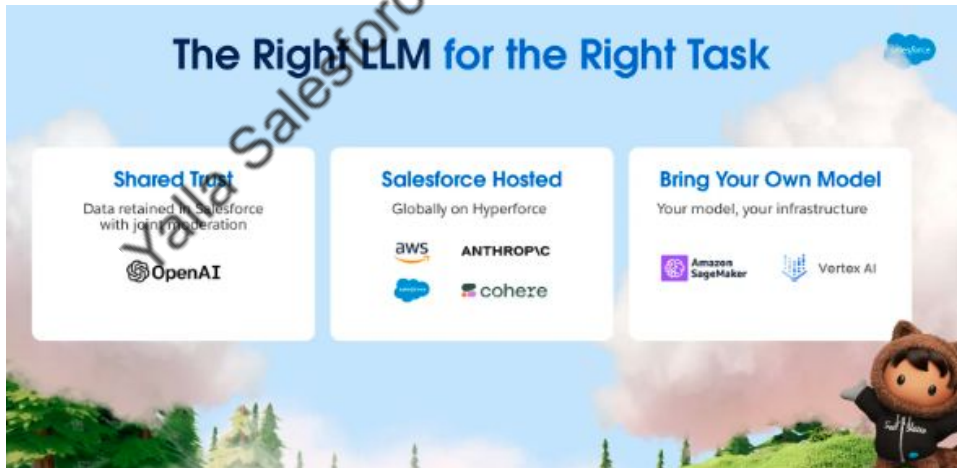
Creates new content, such as images, videos, or text, based on a given input

Natural Language Processing? (NLP)

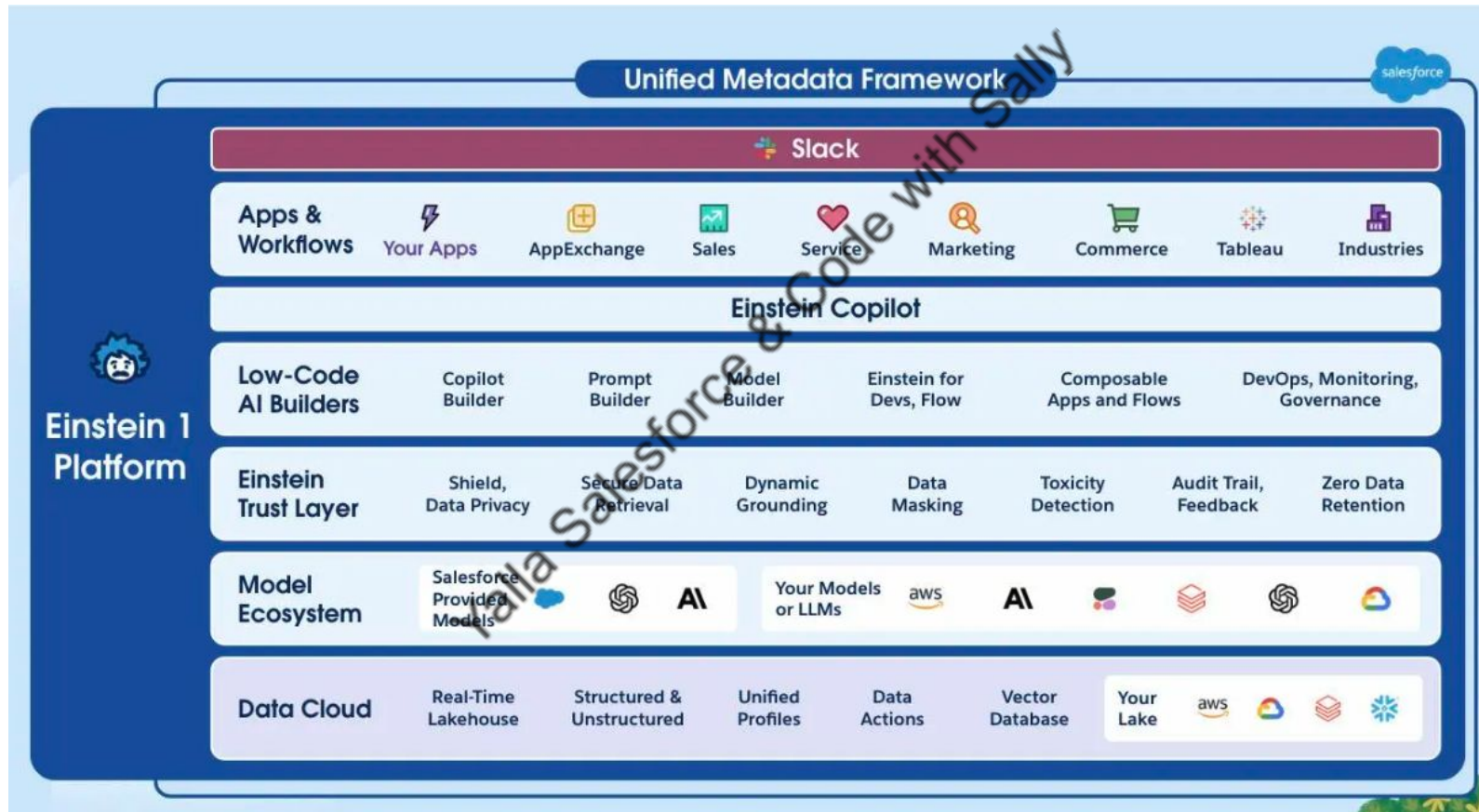
Field of artificial intelligence (AI) that combines computer science and linguistics to give computers the ability to understand, interpret

large language model (LLM).

Advanced computer models designed to understand and generate humanlike text

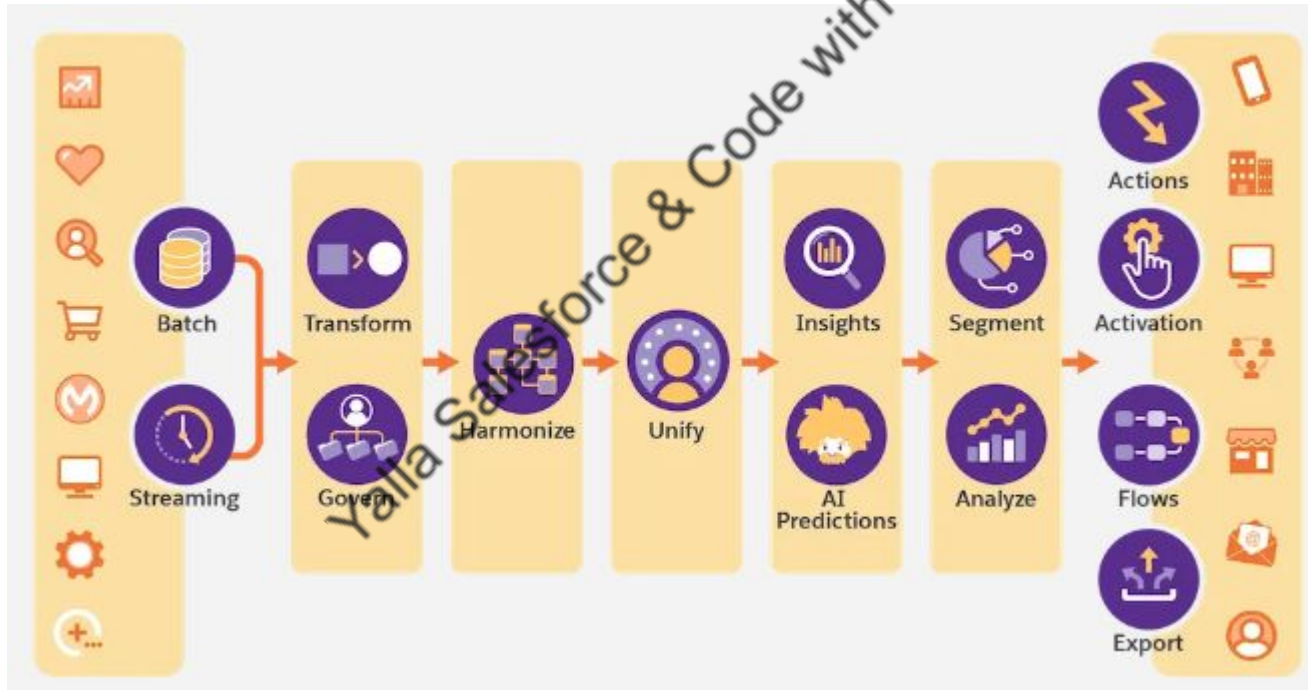


Einstein 1 Platform



Data Cloud

Data platform that combines the power of the Salesforce Platform with the scalability of an infrastructure that allows for processing data in near-real-time





Overview Demo

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Prompt Builder

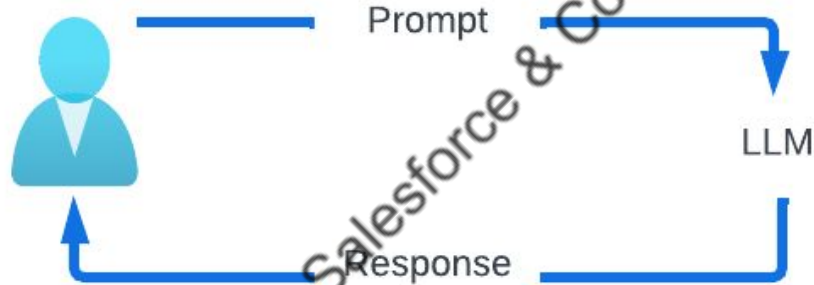
Prompt Builder: 37%

Given business requirements, identify when it's appropriate to use Prompt Builder.

- Identify the right user roles to manage and execute prompt templates.
- Identify the considerations for creating a prompt template.
- Given a scenario, identify the appropriate grounding technique.
- Explain the process for creating, activating, and executing prompt templates.

Prompt

Provide the LLMs with a set of instructions AND relevant data for the LLMs to generate quality results



Prompt

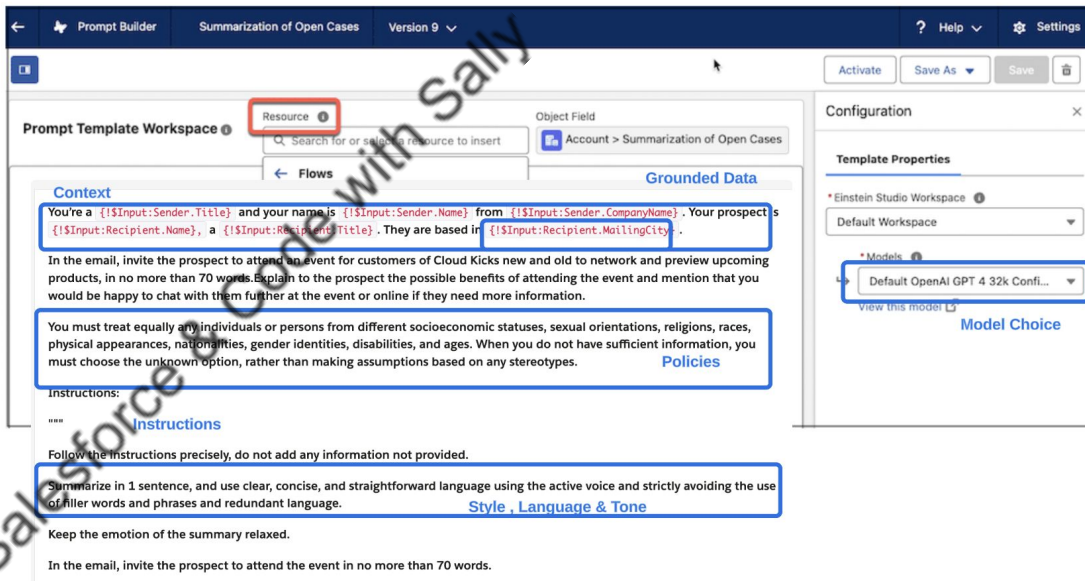
Prompt Builder : Create and refine prompts to get quality output from an LLM. Some of the typical features include the ability to write instructions, provide grounding data, configure LLM parameters, and test the prompt against an LLM

Prompt Template: Reusable template help to generate data-driven and consistent output at scale using unified voice and personalization .

What makes a good prompt and prompt template?

- Instructions
- Policies
- Examples
- Locale , Style & Tones
- Output Format
- Context
- Model
- Grounded Data

Best Practices for Building Prompt Templates



Prompt Builder Limitations

Prompt Template

Prompt Template Types



Sales Email

Used to draft emails for Sales

Bound to (inputs):



User



Contact



Lead



Record (optional)



Field Generation

Used to create text that's stored in a record field

Bound to (inputs):



Record



Record Summary

Used to customize the default summarization Copilot action

Bound to (inputs):



Record



Flex Template

Used to create text that can be used from custom entry points

Bound to (inputs):



Up to 5 record/s (optional)



Grounding Options

[Ground with Record Merge Fields](#)

Record merge fields connect your prompt templates to Salesforce object fields.

[Ground with Flow Merge Fields](#)

Flows elevate your prompt templates beyond grounding with record fields.

[Ground with Apex Merge Fields](#)

You can use an Apex merge field in a prompt template to return data from a SOQL query or to return data from an external API.

[Ground with Data Cloud DMO Merge Fields](#)

Ground your prompt templates with data model objects (DMOs) from Data Cloud in Prompt Builder.

[Ground with Related List Merge Fields](#)

Ground your prompt templates with your object's related lists to add depth and context to your grounding.

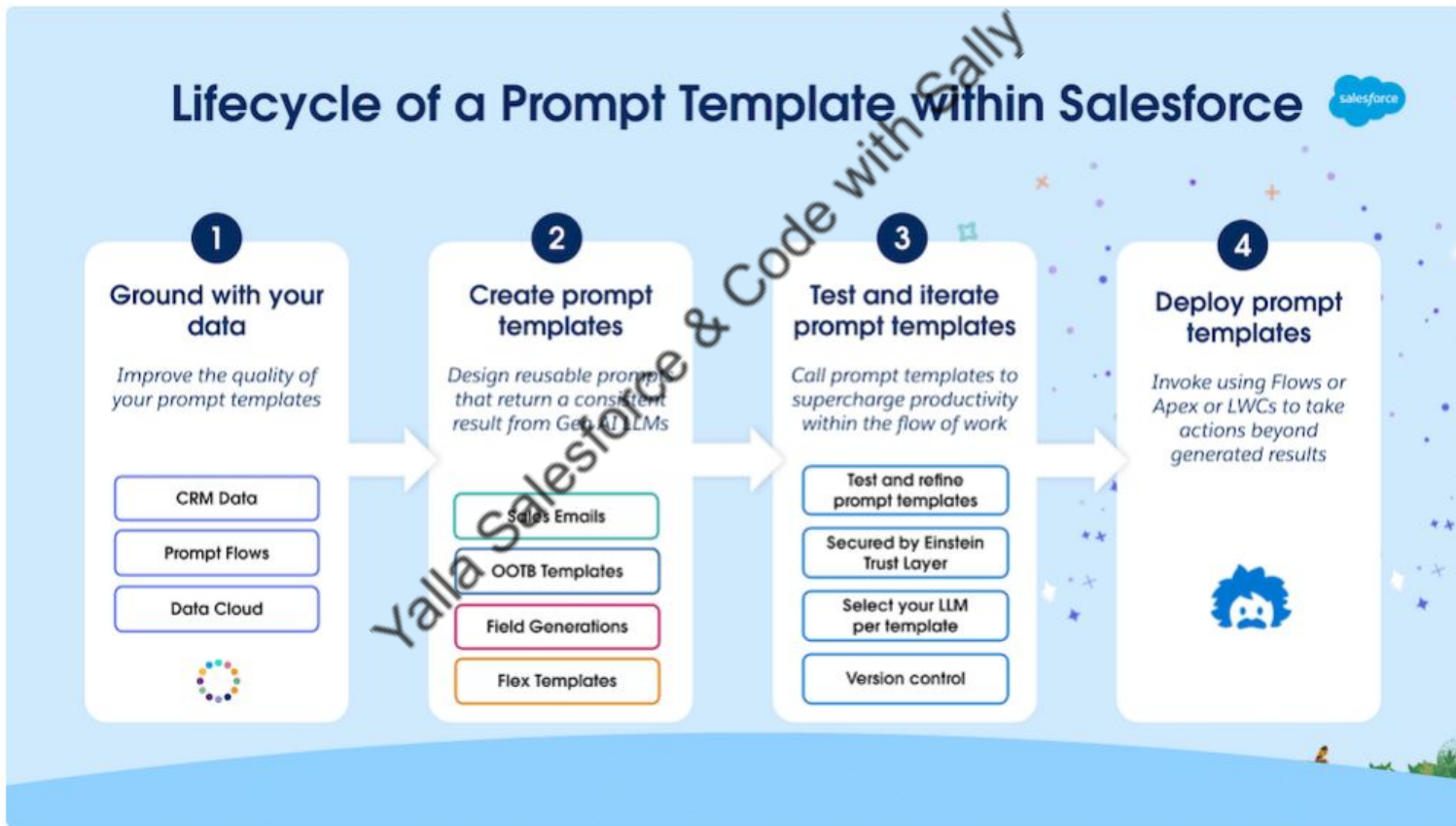
[Ground with Record Snapshots](#)

Ground your prompt templates with Record Snapshots for a more convenient and powerful prompt authoring experience.

[Ground with Retrieval Augmented Generation \(RAG\) in Data Cloud](#)

Enhance your prompt templates by incorporating context from unstructured text sources organized in a vector database such as knowledge articles, emails, and chat transcripts by using Einstein Search.

Prompt Template Lifecycle



Permission Sets

All [Edit](#) | [Delete](#) | [Create New View](#)

New

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

<input type="checkbox"/>	Action	Permission Set Label ↑	Description	License
<input type="checkbox"/>	Clone	E360 Messaging Integration User	Allows integration user to access features specific to E360 Messaging.	Cloud Integration User
<input type="checkbox"/>	Clone	Einstein AI-Generated Search Answers	Provides user access to Einstein AI-Generated Search Answers.	Einstein GPT Search Answers
<input type="checkbox"/>	Clone	Einstein Activity Capture Included	Grants access to use Einstein Activity Capture.	Sales Cloud Unlimited
<input type="checkbox"/>	Clone	Einstein Article Recommendation for Conversations	Give users access to Einstein Article Recommendation for Conversations.	Einstein GPT Article Recommendations for Conversations
<input type="checkbox"/>	Clone	Einstein Conversation Insights Included	Lets sales reps & managers record voice & video calls, process calls to generat...	Sales Cloud Unlimited
<input type="checkbox"/>	Clone	Einstein Copilot for Salesforce Admin	Allows users to build and manage in-org copilots.	Einstein GPT Copilot
<input type="checkbox"/>	Clone	Einstein Copilot for Salesforce User	Gives users access to the Einstein Copilot AI assistant in Salesforce.	Einstein GPT Copilot
<input type="checkbox"/>	Clone	Einstein Sales Call Summaries	Allows users to generate summaries for calls.	Einstein Conversation Insights AI User License
<input type="checkbox"/>	Clone	Einstein Sales Emails	Access Sales Emails features to write emails using Einstein for Sales.	Einstein GPT Sales Emails
<input type="checkbox"/>	Clone	Einstein Sales Summaries User	Lets users create sales summaries for accounts, contacts, leads, and opportunitie...	Einstein Sales Summaries
<input type="checkbox"/>	Clone	Einstein Service Email Assistant User	Use Service Email Assistant features to write emails with Einstein.	Einstein Service Email Assistant
<input type="checkbox"/>	Clone	Email Response User	Give users access to Einstein Service Replies for email.	Einstein GPT Service Replies For Email
<input type="checkbox"/>	Del Clone	External Data	Gives read/view all permissions for records and fields for External Reservation an...	



Einstein Trust Layer

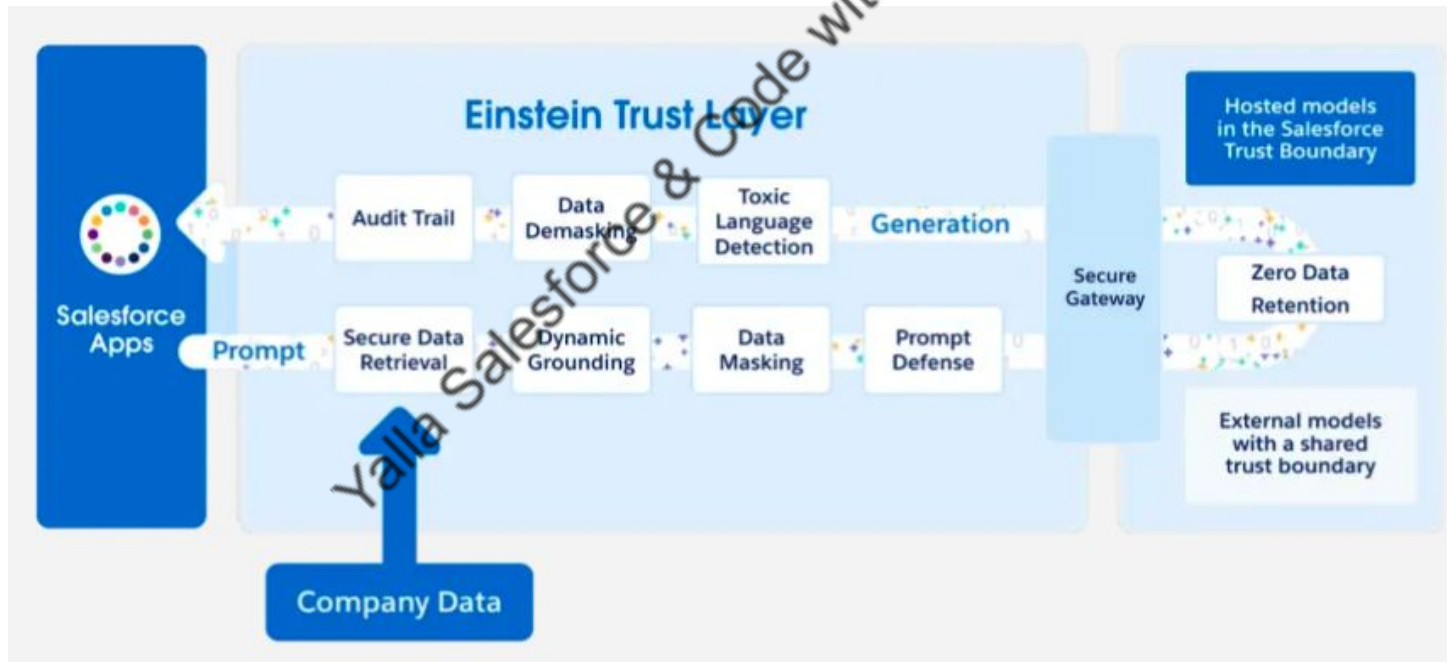
Einstein Trust Layer: 15%

- Identify the security, privacy, and grounding features of the Einstein Trust Layer.
- Implement and manage the Einstein Trust Layer.

The Einstein Trust Layer

Data platform that combines the power of the Salesforce Platform with the scalability of an infrastructure that allows for processing data in near-real-time

Inside the Einstein Trust Layer



Data Masking

Einstein Trust Layer uses data masking to help prevent sensitive information from exposure to third-party large language models (LLMs)

Prompt Template Workspace

Resource Recipient Type

Search for or select a resource to mask. Contact

Introduce yourself and welcome the contact. Let them know that you're sending this email to verify their information. List the following information as a bullet list.

Full Name: Andy Young
Company Name: Dickenson PLC
Business Phone Number: (785) 241-6200
Mobile Phone Number: (785) 265-5350
Email: a_young@dickenson.com
SSN: 243930486
Credit Card on file: 378282246310005

Use clear and straightforward language, using active voice, and avoiding the use of filler words. End with asking them to call Coral Cloud Resort to verify their information on the file

Now create the email.

Data Masking Details

Preview

Resolution

Your name is <PERSON_1> and you're a Sales associate at Coral Cloud Resort writing an email to a new contact to verify their information on record.

Instructions:

Introduce yourself and welcome the contact. Let them know that you're sending this email to verify their information on the following information as a bullet list.

Full Name: <PERSON_0>
Company Name: Dickenson PLC
Business Phone Number: <US_PHONE_NUMBER_1>
Mobile Phone Number: <US_PHONE_NUMBER_0>

Response

The Einstein Trust Layer has masked the following information on record.

Subject: Verification of Information
Body: Dear Becca,

I hope this email finds you well. We have the information we have

- Full Name: Andy Young



The following data has been masked. Learn more in Salesforce Help.

Placeholder Text	True Value
<CREDIT_CARD_0>	378282246310005
<EMAIL_ADDRESS_0>	a_young@dickenson.com
<PERSON_0>	Andy Young
<PERSON_1>	Becca
<US_PHONE_NUMBER_0>	(785) 265-5350
<US_PHONE_NUMBER_1>	(785) 241-6200
<US_SSN_0>	243930486

Audit and Feedback

[Verify Masked Data](#)

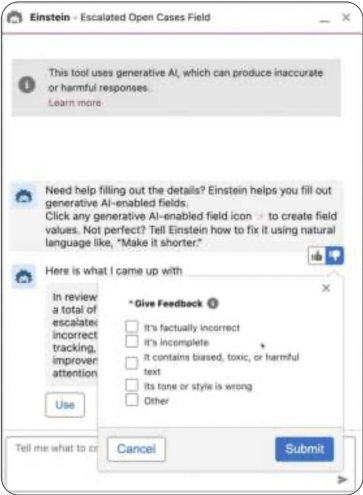
[Review Toxicity Scores](#)

[Safety Scores](#)

[Feedback Data](#)

Create Report

Category	Select a Report Type	
Recently Used	<input type="text" value="GenAI"/>	
All		
Data Cloud	Showing results for GenAI	
Accounts & Contacts	Report Type Name	Category
Opportunities	GenAIGatewayRequestTag	Standard Data Cloud
Customer Support Reports	GenAIGatewayRequest	Standard Data Cloud
Leads	GenAIGatewayRequest with GenAIGatewayRequestTag	Standard Data Cloud
Campaigns	GenAIGatewayRequest with GenAIGatewayResponse	Standard Data Cloud
Activities	GenAIGatewayRequest with GenAIContentQuality	Standard Data Cloud
Contracts and Orders	GenAIFeedback	Standard Data Cloud
Price Books, Products and Assets	GenAIFeedback with GenAIAppGeneration	Standard Data Cloud
Administrative Reports	GenAIFeedback with GenAIFeedbackDetail	Standard Data Cloud
File and Content Reports	GenAIContentCategory	Standard Data Cloud
Individuals	GenAIFeedbackDetail	Standard Data Cloud
Other Reports	GenAIGatewayResponse	Standard Data Cloud



Report: GenAIGatewayResponse with GenAIContentCategory					
Toxicity by Date and Feature Responses					
Shows responses with toxicity score greater than 0.85 sorted by date and feature					
Timestamp	Feature	Detector Type	Category	Value	Response Text
9/14/2024 (11)	Conversation Catch-Up (1)	TOXICITY	safety_score	0.9988225	{ "result": " "natural": "The guest reported a big problem with their product, which was broken. They provided the receipt number and expressed the need to return the product as soon as possible." "issue_resolution": " "issue": "Product return request" "resolution": "The agent guided the guest through the return process." " "additional": " "Speakers": ["AmazeBot", "Guest", "Bassem"] "NumOfChats": 1 }
Subtotal					
EinsteinAssistant (2)		TOXICITY	safety_score	0.9987072	{ "draft_or_refine": "refine" }
		TOXICITY	safety_score	0.99847025	{ "subject": "Your Exciting Vacation Awaits at Coral Cloud Resorts" "body": "Hi Sofia Rodriguez, We're so excited to have you staying with us at Coral Cloud Resorts next month! Our team can't wait to give you top-notch service in a beautiful spot that promises a relaxing and refreshing time. While you're here, why not join our Kundalini Yoga Morning session? It's a great way to get some physical benefits, plus it helps with mental clarity and emotional balance. You'll feel refreshed and ready to take on the day. We're really looking forward to your arrival and making sure you have a fun, relaxing, and memorable vacation. Thanks, and see you soon. Warm regards, Bassem Ismael Guest Services Agent Coral Cloud Resorts- }
Subtotal					
SalesEmailsCustomPrompt (1)		TOXICITY	safety_score	0.99877363	{ "subject": "Exciting Vacation Awaits at Coral Cloud Resorts" "body": "Dear Sofia Rodriguez, We're thrilled to have you staying with us at Coral Cloud Resorts next month! Our team is dedicated to providing you with high-quality service in a beautiful location that promises a relaxing and rejuvenating experience. During your stay, we recommend taking part in our Kundalini Yoga Morning session. This unique activity offers not only physical benefits but also mental clarity and emotional balance. It can positively impact your overall well-being, leaving you refreshed and energized for the day ahead. The resort team is eagerly anticipating your arrival and is committed to ensuring you have a fun, relaxing, and memorable vacation. We look forward to meeting you and creating wonderful memories together. Warm regards, Bassem Ismael Guest



Einstein Copilot

Einstein Copilot: 23%

- Given business requirements, identify when it's appropriate to use Einstein Copilot.
- Explain how the large language model (LLM) identifies and executes a copilot action.
- Leverage standard copilot actions and create custom copilot actions.
- Manage and monitor Copilot adoption.

Einstein Copilot

Trusted conversational AI agent .It has the capability to perform business tasks on behalf of the users

Topic : An agent topic is a category of actions related to a particular job to be done by agents

Action : It's how agents and copilot gets things done.

Reasoning Engine AI system that mimics human-like decision-making and problem-solving capabilities based on certain rules, data, and logic

← Topic Details

* Topic Label

General CRM

* Classification Description ⓘ

Engages and interacts with the user about any request that could be CRM data related. This could be tasks such as identify and summarize records, answer queries, aggregate data, find and query objects, update records, or drafting and refining emails.

* Scope ⓘ

Your job is to interact and answer questions for the user about anything Salesforce or CRM data related, combining all data retrieval functions. i.e: QueryRecords(), GetRecordDetails(), GetActivitiesTimeline(), GetActivityDetails(), WebSearch()

The following instructions are used to run this topic.

* Instruction ⓘ

There are multiple available data retrieval functions at your disposal. You can use each one of them multiple times if needed. You should use functions as many times as necessary until you have all the data required to fulfill the request of the user. You can perform extra calls if you think you can get additional relevant information.

* Instruction ⓘ

Do not declare your intent i.e. "I will now retrieve the data" - Just fetch the data.

* Instruction ⓘ

Identify the object type (i.e., leads, opportunities, accounts) the user asks about. If unclear, confirm with the user and make a suggestion based on the query context and history.

#

← Topic Details

Topic Configuration

This Topic's Actions

Manage the actions assigned to your topic. To add or remove actions, your agent must be deactivated.

Q Search actions...

4 items • Sorted by Agent Action Label(asc)

Agent Action Label ↑

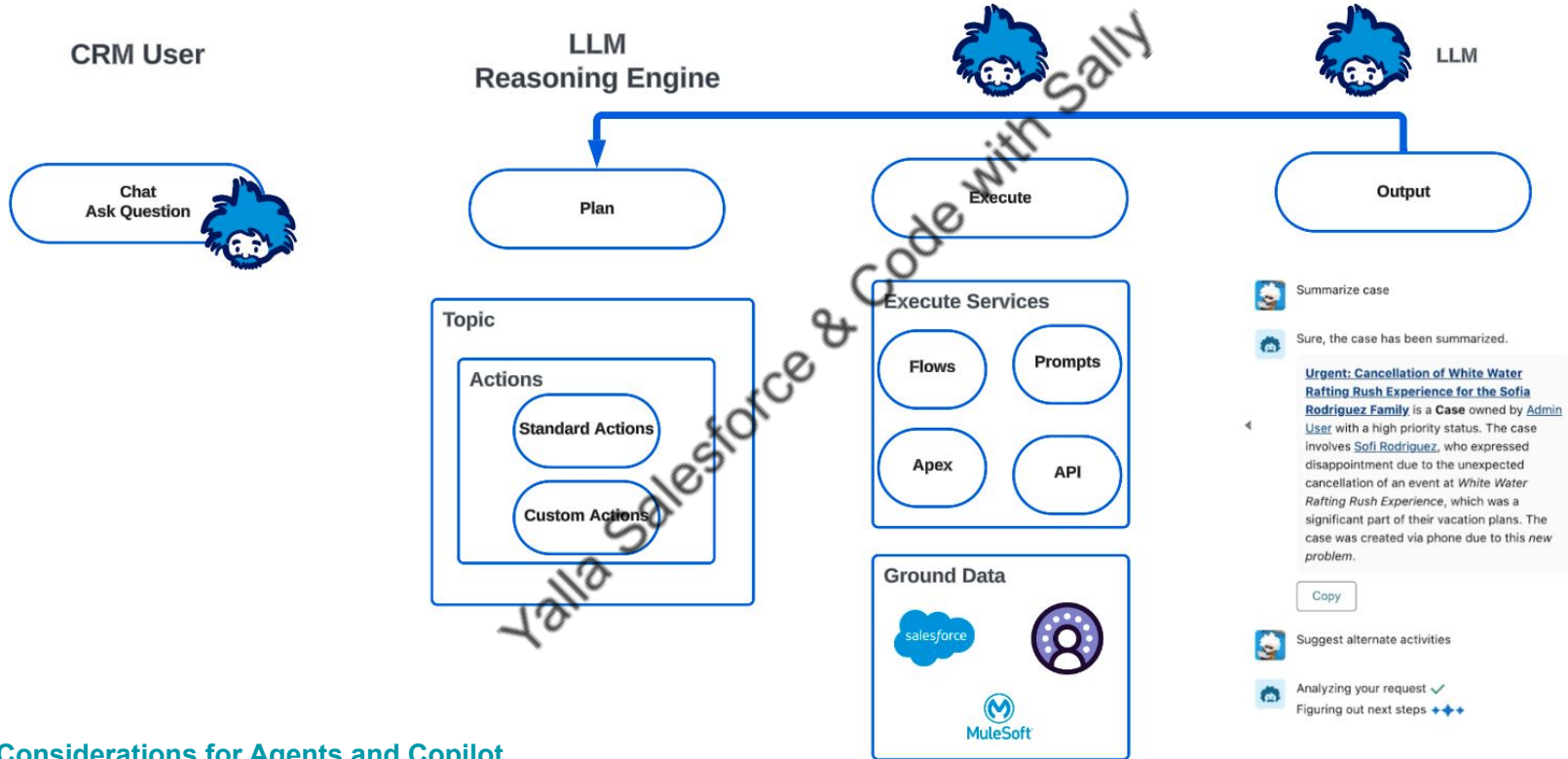
> Generate Personalized Schedule

> Check Weather

Get Record Details

Identify Record by Name

How Copilot Work



Considerations for Agents and Copilot

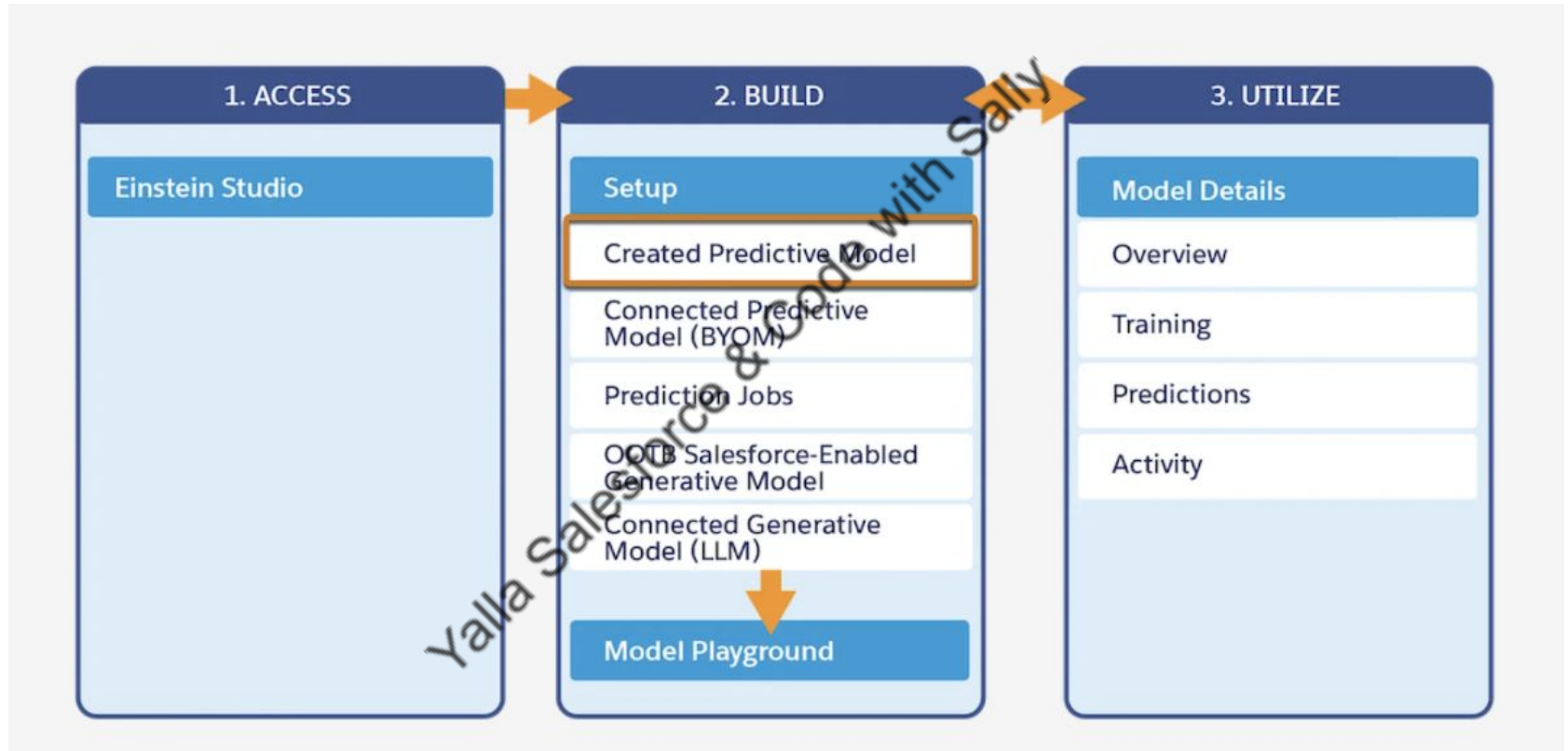


Model Builder

Model Builder: 8%

- Given business requirements, identify when it's appropriate to use Model Builder.
- Configure standard, custom, and Bring Your Own Large Language Model (BYOLLM) generative models.

Model Builder



LLM Additional Parameter



Generative AI in CRM Applications

Generative AI in CRM Applications: 17%

- Given a scenario, identify the correct generative AI feature in Einstein for Sales.
- Given a scenario, identify the correct generative AI feature in Einstein for Service.

Einstein for Sales



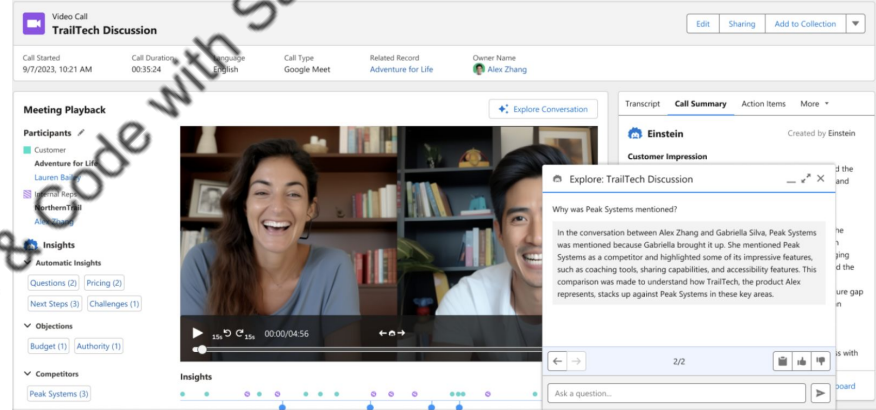
Call Explorer

Sales Email

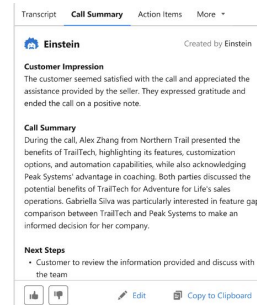
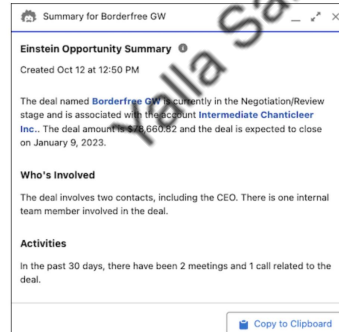
Forecast Guidance (Agent Action)

Close Plan (Agent Action)

Sales Summaries



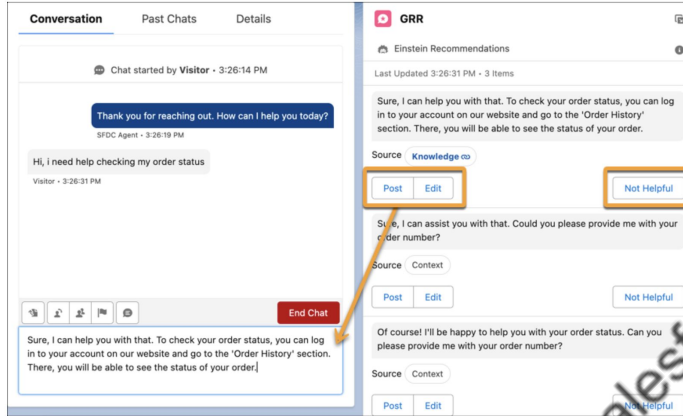
Call Summaries



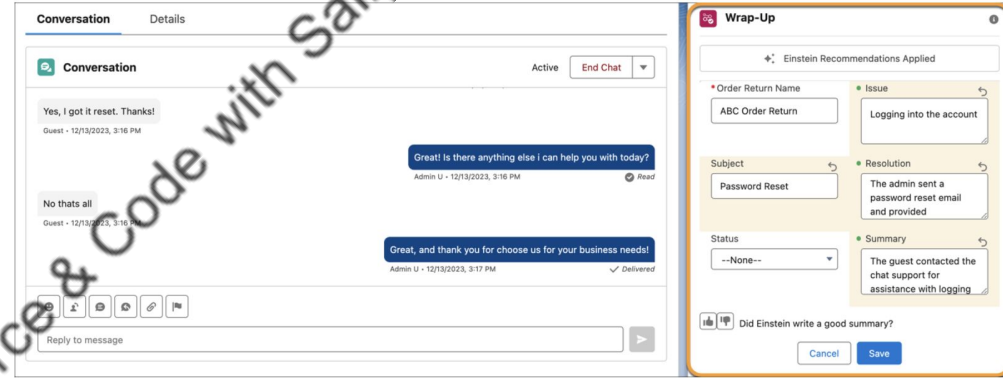
Einstein for Service



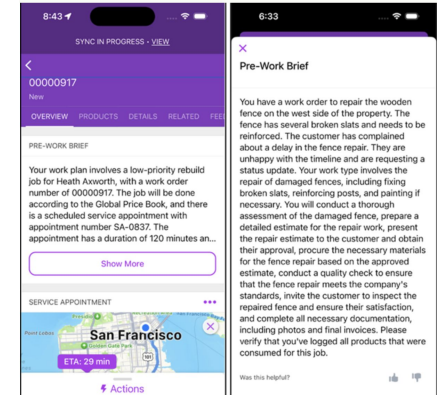
Service Replies



Work Summaries



Mobile Pre-Work Brief



Knowledge Creation

Search Answers



**Thank You
Q&A**

