



Einstein GPT for Einstein Bots

Article Answers
Knowledge-Grounded Summaries

Salesforce, Summer '23




@salesforcedocs
Last updated: August 9, 2023

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Article Answers Knowledge-Grounded Summaries

About Einstein GPT

Einstein GPT brings trusted generative AI technology to your business at scale with out-of-the-box capabilities across the Customer 360. You can choose from an ecosystem of public AI models, like OpenAI's, one of Salesforce's proprietary models, or your own model to securely connect to your customer data. Salesforce built Einstein GPT with trust at the forefront, requiring the privacy, compliance, and integrity of business data while using Large Language Models (LLMs).

Einstein GPT and Your Data

At Salesforce, trust is our #1 value. To keep your data secure, Salesforce has agreements in place with LLM providers, like OpenAI. Organizations can leverage generative AI capabilities without their private data being used to train the LLM.

Trusted Generative AI

Salesforce's Einstein GPT solutions are designed, developed, and delivered based on five principles for trusted generative AI.

- Accuracy: We prioritize accuracy, precision, and recall in our models, and we back our model outputs up with explanations and sources whenever possible. We recommend that a human check model output before sharing with end users.
- Safety: We work to mitigate bias, toxicity, and harmful outputs in our models using industry-leading techniques. We protect the privacy of personally identifiable information (PII) in our data by adding guardrails around this data.
- Honesty: We ensure that the data we use in our models respects data provenance and we have consent to use the data.
- Empowerment: Whenever possible, we design models to include human involvement as part of the workflow.
- Sustainability: We strive towards building right-sized models that prioritize accuracy and reducing our carbon footprint.

Learn more at [Salesforce AI Research: Trusted AI](#).

About Article Answers Knowledge-Grounded Summaries

Create even more powerful FAQ bots from your knowledge base with Knowledge-Grounded Summaries. With the help of Einstein GPT, Article Answers can go beyond answering customer questions with a single knowledge article field. When a customer asks your bot a question, Einstein GPT searches your knowledge base for relevant articles and generates a comprehensive, conversational, knowledge-grounded summary, which is delivered directly in the bot conversation.

EDITIONS

Article Answers is available in Lightning Experience. Setup for Einstein Bots is available in Lightning Experience.

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To build and manage Einstein Bots:

- Customize Application OR Modify Metadata OR Manage Bots

Note: This feature is only supported in English.


Knowledge-Grounded Summaries and Your Data

Knowledge-Grounded Summaries uses fields from your knowledge articles to add context and personalization to the prompt that creates the summaries, a method known as grounding. In Knowledge-Grounded Summaries, this data is used:

Object	Fields	Description
Knowledge__kav	The Knowledge fields you map to the Question and Answer fields in Article Answers	Used to form a question-answer pair to search your Knowledge base for the top 1-5 relevant articles. The fields from these top articles are sent to Einstein GPT to generate summaries.
Knowledge__kav	Article URL	When citations are enabled, Knowledge-Grounded Summaries returns the Article URL field in the bot conversation for each article used to generate the summary.

Your data stays inside Einstein GPT and isn't shared with the LLM. See [Einstein GPT and Your Data](#).

Set Up Knowledge-Grounded Summaries

 **Important:** This tool uses generative AI, which is known to include inaccurate or harmful responses. You assume responsibility for the output.

Prerequisites

- To participate in the Einstein Knowledge Bot Pilot, contact your account executive.
- [Enable Lightning Knowledge](#) and publish at least 10 knowledge articles.
- To surface citations for the articles used to generate summaries, include a URL in the URL Name field for the articles in your Knowledge base. Articles without a URL in the URL Name field won't be included in the citations, even if they were used to generate the summary.
- [Enable Einstein Bots](#).
- To get feedback on Article Answers search performance, after you've created your bot, we recommend enabling the Log Conversations setting on the Bot Overview page.
- To perform a Knowledge object search, the Bot User must be assigned to a Custom Chatbot User with access to the Knowledge object. After you've created your bot, you can [change the bot user profile](#) on the Bot Overview page. The Bot User also needs Knowledge User enabled. Learn more about [Lightning Knowledge User Access](#) in Salesforce Help.

Set Up Article Answers in Your Org

If you already have Article Answers set up in your org, review your field mapping to make sure it still meets your needs. Otherwise, skip this section and jump to [Enable Article Answers for Your Knowledge Bot](#).

1. Navigate to the Einstein Bots Setup page. From Setup, enter Einstein Bots in the Quick Find box, and then select **Einstein Bots**.
2. Click the **Smart Features** tab. Then under Article Answers, click **Get Started**.
3. Select the fields and data categories that the bot uses to generate and deliver answers.

Article Answers requires Question, Answer, and Title fields. To populate these fields, you can add dedicated Question, Answer, and Title fields to your Knowledge page layout. Or you can map existing fields to each field type. Only published articles with valid values in all these selected fields are indexed and searched.

Make sure to map the Article Answers fields to the Knowledge fields that best represent your knowledge article structure. For example, if most of the relevant information for your customers is located in the Resolution field, map that field to the Article Answers Answer

field.

Question	<p>Used as an index to compare to the customer's question. Used to form a question-answer pair to search your Knowledge base for the top 1-5 relevant articles.</p> <p>We recommend adding multiple questions to a knowledge article. Start each question on a new line of the Question field.</p> <p>Adding multiple questions to capture even minor variations can improve the accuracy of answers returned. For example, in our testing, an article with both "How do I make Cold Brew Coffee?" and "What's the recipe for a cold brew?" in the Question field performed better than the same article with either question alone.</p>
Answer	<p>Used to form a question-answer pair to search your Knowledge base for the top 1-5 relevant articles. Einstein GPT compares this field to the customer's question across multiple articles and uses it to create AI-generated summaries.</p>
Title	<p>In classic Article Answers, displayed as a menu button when there are multiple relevant articles. In Einstein GPT for Article Answers, this field is required for setup but isn't surfaced to customers.</p>

Configure Article Answers

Article Answers uses knowledge articles to deliver responses. Select mappings for each field type. Only published articles with values in all these fields are included.

Select which field trains the bot to find answers
The bot compares text in this field to the customer request.

* Question Field

Select which field the bot uses to deliver answers
The bot sends the content of this field as a response.

* Answer Field

Select which field represents the article title
The bot displays this field when there are multiple results.

* Title Field

It can take a few hours to finish the build. Check the Bots Setup Page for progress updates. When it's ready, configure Article Answers for each bot on the Bot Overview page.



Note: These fields don't support rich text area field types.

4. Click **Build**. The bot indexes the knowledge base for approved articles and creates a build of the approved articles. To view the status of the build, check the Einstein Bots Setup page in about 30 minutes. When complete, the feature shows an Active status.

To capture updates to the knowledge base, the build automatically refreshes when new articles or changes to existing articles have been published in the last 24 hours. You can manually refresh at any time using the Refresh button on the Setup page.

5. (Optional) You can create and assign Knowledge Data Category Segments to your bots and show a subset of articles to specific audiences. To assign categories to the segment, define a Segment Name and select multiple data categories. To include uncategorized articles in the segment, select **Include Uncategorized Articles**, and then save your changes.

Add data category segment

Article Answers uses knowledge articles to deliver responses. Select data categories to assign to your bot. You can name each segment for easy reference. Each bot can use one data category segment.

*Segment Name
test_name

Knowledge Data Categories
Select up to 8 categories...

Knowledge Article Categories

- > third
- > Capricorn Manufacturing
- > Industrial
- > Commercial
- > Personal
- > gr2
- > gr1
- > Consumer
- > Coffee
- > PartsAndCare
- > Accessories


Industrial X Commercial X

Include Uncategorized Articles

In the next step you can optionally select which bot versions you want to use with this category mapping.

Cancel Save

Enable Article Answers for Your Knowledge Bot


1. Navigate to the Bot Overview page for your bot. From the Bot Builder menu, select **Overview**.
2. Under Settings, in the Article Answers tile, click  to edit the tile. If you aren't already using Article Answers with this bot, select **Use Article Answers with this bot**. Otherwise, skip to Step 3.
3. To generate knowledge-grounded summaries with Einstein GPT, select **Send AI-generated responses**. When this setting is enabled, the bot uses Einstein GPT to determine the top 1-5

knowledge articles related to the customer's question and create a conversational summary to deliver as a response in the conversation.

4. To include citations of the knowledge articles Einstein GPT used with the relevant AI-generated responses, select **Include citations for AI-generated responses**. This setting is enabled by default.

When this setting is enabled, the bot follows each summary with a list of the URLs for the knowledge articles cited. If Einstein GPT for Article Answers uses an article to generate a summary that doesn't include a populated URL Name field, the article isn't included in the list of citations.

We recommend including citations with summaries, as long as it doesn't negatively affect the user experience on your channels, because this feature uses generative AI without a human in the loop to review the content for relevance, accuracy or safety. Citations ensure transparency with your customers.

5. (Optional) Use the dropdowns to select a Knowledge Data Category Segment.
6. To save your changes, click .

Your bot comes pre-configured with an Article Answers dialog, available in the Dialogs page of the Bot Builder. The dialog is pre-configured to work with your bot, but it can be customized to reflect your company's voice and tone.

After the bot delivers an answer to the customer, the dialog is configured to ask the customer if the answer was helpful. The Knowledge Feedback action step after the question dialog step comes with variables to collect this feedback. To view your users' feedback and evaluate Article Answers performance in your org, view the Article Chosen and Article Positive Feedback standard bot reports.

Customize Your Bot's Welcome Dialog

This feature uses generative AI without a human in the loop to review the content for relevance, accuracy, or safety. Just as you should always disclose that the customer is talking to a bot and not a human, Salesforce requires that you disclose that your bot will serve AI-generated responses to ensure trust and transparency, per our [Acceptable Use Policy](#).

1. Navigate to the Dialogs page for your bot. From the Bot Builder menu, select **Dialogs**.
2. Select the dialog that you use as your bot's Welcome dialog.
3. From the Dialog Component Library, drag a **Message** dialog step onto the canvas where you want to add your AI disclosure. Or you can edit an existing Message step.
4. In the Step Properties panel, copy and paste the following text into the Message field:
`Just so you know, I use AI to generate some of my responses. Note that AI-generated responses can be inaccurate or harmful. Review my responses for relevance, accuracy, and safety.`
5. Save your changes. Then when you're ready, activate your bot.