Prompt Builder (Pilot)

Salesforce, Winter '24

@salesforcedocs
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PROMPT BUILDER

Resources

- Example Prompt Template Library
- Trailhead: Prompt Fundamentals
- Trailhead: Prompt Builder: Quick Look
- Trailhead: Prompt Builder Basics

About Einstein Generative AI

Einstein brings trusted generative AI technology to your business at scale with out-of-the-box capabilities across 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 generative AI with trust at the forefront, requiring the privacy, compliance, and integrity of business data while using large language models (LLMs).

Generative AI and Your Data

At Salesforce, Trust is our #1 value. To keep your data secure, Salesforce has agreements with LLM providers such as OpenAI. Organizations can use generative AI capabilities without their private data being used to train the LLM.

Trusted Generative AI

Salesforce's generative AI 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 support our model outputs 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.
- **Honesty:** We ensure that the data we use in our models respects data provenance and that 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 to build right-sized models that prioritize accuracy and reduce our carbon footprint.

Learn more at *Salesforce AI Research*: Trusted AI.

About Prompt Builder

With Prompt Builder, you can create, test, revise, customize, and manage prompt templates that incorporate your CRM data from merge fields, flows, and Apex. These prompt templates make your users' daily workflows easier and your business smarter. Prompt Builder helps you craft effective prompts that safely connect you and your data with LLMs.

You can create two different types of prompt templates in the Prompt Builder pilot.

- **Sales Email prompt templates** help your team draft personalized emails for a contact or a lead.
- **Field Generation prompt templates** bring generative AI-assisted workflows to form fields within Lightning record pages. Enable your users to populate a field with a summary or description created by an LLM.

To learn more about prompts, prompt templates, and Prompt Builder in an engaging story-based format, check out these Trailhead modules.

- Prompt Fundamentals
- Prompt Builder: Quick Look
- Prompt Builder Basics

EDITIONS

Prompt Builder is available in Lightning Experience in Unlimited Edition.

To use Prompt Builder, you must purchase the Einstein for Sales add-on. Contact your account executive for more information.

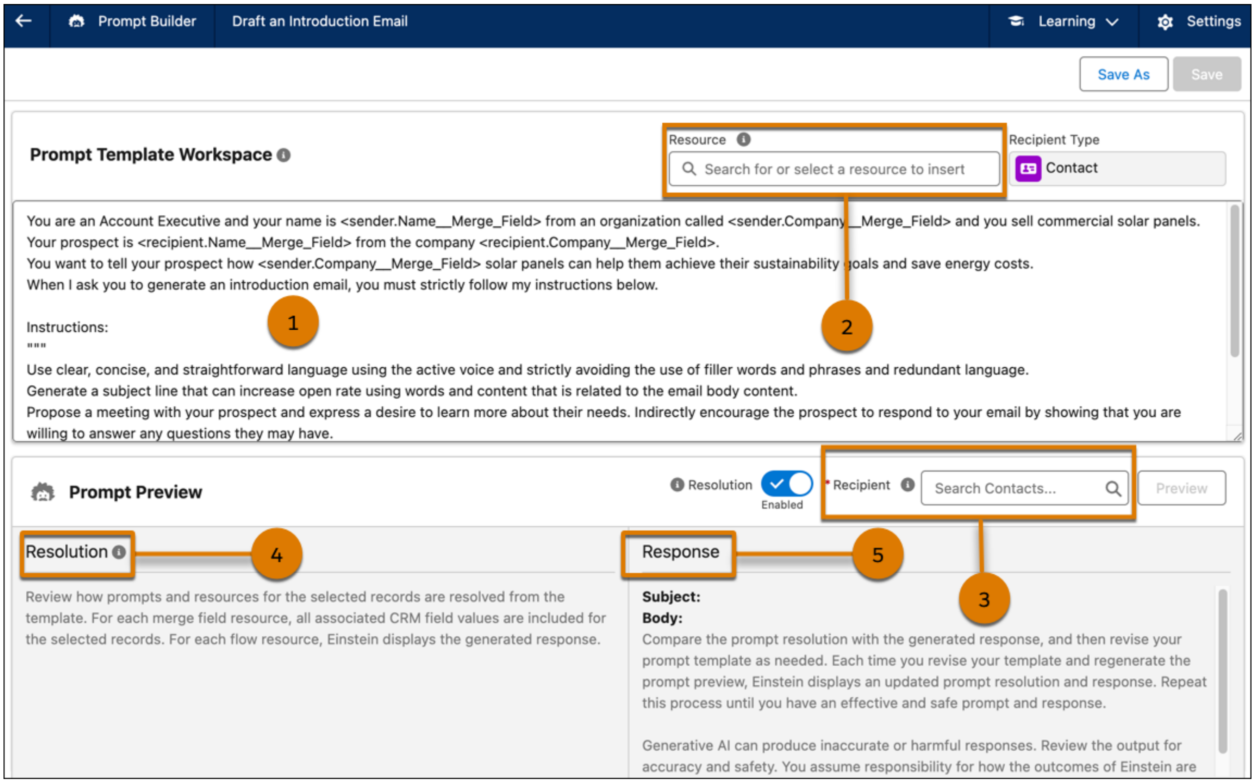
PERMISSIONS

To build and manage prompt templates in Prompt Builder:

- Einstein GPT Prompt Template User permission set

Get to Know Prompt Builder

Take a look at the Prompt Builder UI for a Sales Email prompt template.



You are an Account Executive and your name is <sender.Name__Merge_Field> from an organization called <sender.Company__Merge_Field> and you sell commercial solar panels.
Your prospect is <recipient.Name__Merge_Field> from the company <recipient.Company__Merge_Field>.
You want to tell your prospect how <sender.Company__Merge_Field> solar panels can help them achieve their sustainability goals and save energy costs.
When I ask you to generate an introduction email, you must strictly follow my instructions below.

Instructions:
""""
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
Generate a subject line that can increase open rate using words and content that is related to the email body content.
Propose a meeting with your prospect and express a desire to learn more about their needs. Indirectly encourage the prospect to respond to your email by showing that you are willing to answer any questions they may have.

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.

Subject:
Body:
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

Add or edit your project template (1). See Build a Prompt Template.

Add resources, such as merge fields, flows, and Apex (2). See Ground Prompt Templates with Salesforce Resources.

To preview a sales email response, search for and select a **Recipient** (3). To generate the resolved prompt and the response, click **Preview**. See Preview a Generated Response. A field generation project template has a Record field instead of a Recipient field.

Review how the resources are resolved for the selected recipient (4). See Enable Resolution to Review a Prompt Template.

Review the email generated by the LLM response (5). See Evaluate the Quality of a Response.

Before you save and make it available to your sales team, review and refine the prompt template. See Review, Revise, and Repeat: Ensure the Prompt Template is Effective.

Understand Prompts and Prompt Templates

Behind the scenes, large language models (LLMs) power Einstein generative AI. LLMs can help your teams with all sorts of language-based tasks. For example, they can generate a personalized email to a customer, or analyze customer feedback and extract key insights. But LLMs can't create great content by themselves. They need guidance from you in the form of a prompt.

A **prompt** is the set of detailed instructions that you give an LLM. Similar to a recipe, a great prompt provides specific contextual information, data, instructions, and constraints that help the model generate accurate and personalized output. The output that the LLM generates is called a **response**.

Here's an example prompt that instructs the LLM to create a summary of open cases for the Astro's Bakery account.

```
You're a support representative and you need to create a short summary of all open
cases for the Astro's Bakery account.

When I ask you to summarize the open cases, you must strictly follow my instructions
below.

Instructions:
"""
Summarize the open cases in one paragraph no longer than 500 characters. Mention
how many open cases there are and what the case issues are.
Use clear, concise, and straightforward language using the active voice and strictly
avoiding the use of filler words and phrases and redundant language.

Use the following information to write the summary:

Case #1 details: The widgets we received are the wrong size. We needed a widget in
size A, but we received a widget in size B.

Case #2 details: Our Widgets haven't been delivered. We can't track our order.
According to the last tracking update, the Widgets should have arrived on June 5th.
Now it's June 10th, and they still haven't arrived.

Do not attribute any positive or negative traits in the summary.
"""

Now create the summary.
```

Here's a case summary that an LLM generated from the example prompt.

There are two open cases for the Astro's Bakery account. In Case #1, the issue is that the received widget is the wrong size. The requested size was A, but size B was received instead. In Case #2, the issue is that the widgets haven't been delivered and the order cannot be tracked. The expected delivery date was June 5th, but as of June 10th, the widgets have not arrived.

The quality of an LLM's response depends on the prompt's specificity. Vague or inaccurate instructions can lead an LLM to produce an irrelevant or a biased response. Sometimes an LLM can even **hallucinate** and generate false information. And because you make a new call to the LLM every time you run a prompt, its responses can differ, even if you're passing in the exact same prompt. To prevent hallucinations and to minimize variability between responses, create a prompt with as much specific data as possible. Then it's vital to review and edit your prompt until you consistently achieve high-quality, accurate responses.

This process of creating and iterating on a new prompt to generate just one high-quality response can be time-consuming. It's even harder to design dozens of original prompts, each with different data and specifications. Also, prompts created by different people can produce inconsistent output due to variations in writing style. To scale prompt design efficiently, it's best to use a **prompt template**, which is a reusable prompt. A prompt template includes placeholders for specific details about customers, products, and more.

Here's a prompt template that instructs an LLM to generate a summary of an account's open cases. Unlike the previous example prompt, this prompt template doesn't specify an actual account name or describe current open cases. Instead, the prompt template contains generic object fields like {!$account.Id} as placeholders.

You are a support representative and you need to create a short summary of all open cases for account {!$account.Id}.

When I ask you to summarize the open cases, you must strictly follow my instructions.

Instructions:
"""
Summarize the open cases in one paragraph no longer than 500 characters. Mention how many open cases there are and what the case issues are.
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.

Use the following information to write the summary:

{!$Flow__Get_Open_Cases_for_Account.Prompt}

Do not attribute any positive or negative traits in the summary.
"""

Now create the summary.

Prompt Builder replaces these placeholders in your template with your real data. The result is a prompt that's tailored to the data that you selected. This process of populating a prompt template with specific data is called **prompt resolution**. An example of a **resolved prompt** is the prompt about the two open cases for the Astro's Bakery account**.** With Einstein, prompt resolution is as easy as selecting Salesforce records to associate with the prompt.

Using prompt templates is ideal for B2C communications because they can generate consistent and data-driven output at scale. Templates that contain the same brand guidelines generate content with a unified voice and style. Each template is developed for a specific use case, and it can be reused by tailoring the prompt with different data.

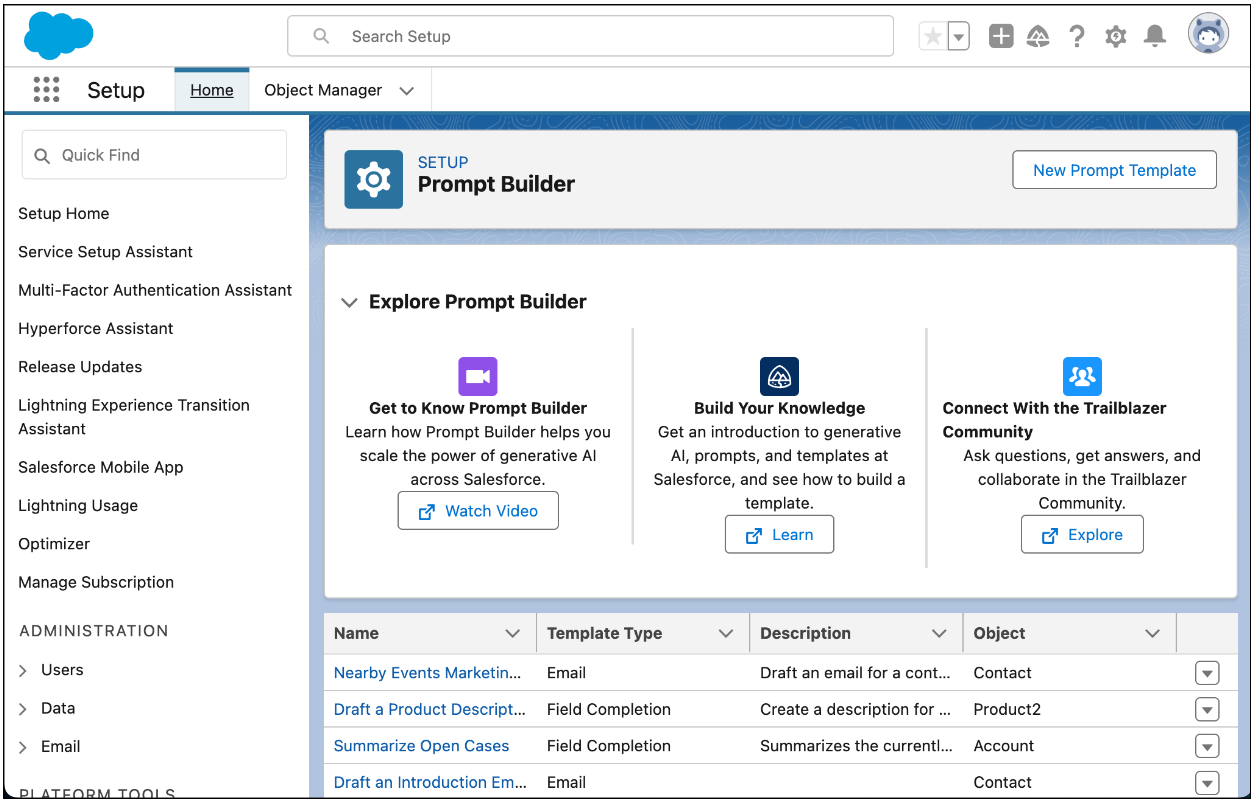
Use Prompt Templates in Salesforce Apps

While you manage prompt templates in Prompt Builder, your users can benefit from prompts across Salesforce apps. When you integrate prompt templates with Sales Emails and Lightning record pages, Einstein can elevate users' workflows. Instead of creating prompts from scratch, users can simply select records that fill the placeholders in the prompt template. The LLM generates a response that users can review and edit without leaving their current work environment. To fully benefit from generative AI, it isn't necessary for your users to become prompt designers. See How Users Work with a Prompt Template.

Enable Prompt Builder

Before you can use Prompt Builder, enable Einstein in the organization and assign users the correct permission set.

1. Turn on Einstein generative AI in Setup.
2. To build sales email prompt templates, turn on Sales Emails.
    a. From Setup, in the Quick Find box, enter `Einstein Sales`, and then select **Einstein for Sales**.
    b. Enable Sales Emails. It can take a few minutes before the feature is ready to use.
3. Assign the Einstein GPT Prompt Template User permission set.
    a. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.
    b. From the Permission Sets list view, click **Einstein GPT Prompt Template User**.
    c. From the Einstein GPT Prompt Template User detail page, click **Manage Assignments** and **Add Assignments**.
    d. Select the checkboxes next to the names of the users, including yourself, that you want assigned to the permission set, and click **Next**. To add a user to the Einstein GPT Prompt Template User permission set, the user must have access to Setup.
    e. Click **Assign**.
4. Refresh the page so that Prompt Builder is now visible in Setup.
5. To open Prompt Builder from Setup, in the Quick Find box, enter `Prompt Builder`, and then select **Prompt Builder**.



Get to Know Prompt Builder
Learn how Prompt Builder helps you scale the power of generative AI across Salesforce.

Build Your Knowledge
Get an introduction to generative AI, prompts, and templates at Salesforce, and see how to build a template.

Connect With the Trailblazer Community
Ask questions, get answers, and collaborate in the Trailblazer Community.

Name	Template Type	Description	Object
Nearby Events Marketin...	Email	Draft an email for a cont...	Contact
Draft a Product Descript...	Field Completion	Create a description for ...	Product2
Summarize Open Cases	Field Completion	Summarizes the currentl...	Account
Draft an Introduction Em...	Email		Contact

Note: To add flows with Data Cloud objects to a prompt template, turn on Data Cloud and assign the correct permission sets. See Set Up and Maintain Data Cloud.

Pilot Feedback

To ask questions or provide feedback about the Prompt Builder pilot, post to the Prompt Builder Pilot Trailblazer Community.

Build a Prompt Template

When you start to build original prompt templates, it can feel intimidating. Like all new skills, designing great prompts requires some experimentation and practice. To guide your prompt design, it's helpful to start with the key components of every effective prompt template. Like a good recipe, these "ingredients" work together to help LLMs generate accurate and consistent responses.

Ingredients of a Prompt Template

All prompts are different. You don't need every ingredient in every prompt template.

Participants
Describe who's sending and receiving the model's response. You can add the participant information using merge fields and flows.

Example: You're a <sender.JobTitle_Merge_Field> and your name is <sender.Name_Merge_Field> and you're from an organization called <sender.Company_Merge_Field>. Your prospect is <recipient.Name_Merge_Field> from the company <recipient.Company_Merge_Field>.

Setting

Give the model contextual information, such as the communication channel or type of content that the response is for. Your prompt template type determines your setting. For example, if you choose the Field Generation template type, your setting is a record field.

Goal

Describe what you hope to achieve with the model's response. Make sure that you consider your users' context, preferences, and past behavior. You can add details to your goals by using merge fields and flows.

Example: Encourage your contact to attend the <event.Subject_Merge_Field> event in <event.Location_Merge_Field>.

Relationships

Describe the relationship between the participants involved. Also mention how the model's response relates to the participants.

Example: You are a customer service agent interacting with a customer over chat for the first time.

Data

Give the model relevant CRM data to work with using merge fields and flows.

Instructions

Tell the LLM what type of content you want and what it must include. Surround instructions in triple quote boundaries, which help Einstein distinguish between prompt context and instructions.

Example:

Instructions:
"""
Generate an introduction email to your prospect. Indirectly encourage the prospect to respond to your email by showing that you are willing to answer any questions they may have.
"""

Limits

To reduce hallucination, give the model rules it must follow.

Example: When I ask you to generate an introduction email, you must strictly follow my instructions below.

Language

Tell the model which language to generate the response in. Currently, Prompt Builder supports English only.

Style and Tone
Give the model style and tone guidelines to follow.

Example: Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.

To contextualize these ingredients, use these questions to identify the details that your prompt template requires to be effective.

- **What's the goal of the prompt template?**
  By declaring the goal of the response first, you can better answer all following questions.
- **Who is involved?**
  Describe the participants who send or receive the response, the relationship between the participants, and the relationship between the participants and the response.
- **What's the context of the prompt template and the response?**
  Define a setting for the model response, the CRM data to ground the prompt in, and add a command that tells the model what to generate.
- **What guardrails does this prompt template need to succeed?**
  You can add more information, such as a model containment command to prevent hallucinations, the model's response language, and instructions for the response's style and tone.

An effective prompt template answers these questions so that the LLM can generate a personalized response every time. A great prompt template is also scalable so that you can reuse it across different use cases. With Prompt Builder, it's easy to design prompt templates that achieve these goals.

Ground Prompt Templates with Salesforce Resources

With Prompt Builder, you can dynamically **ground** prompt templates with CRM data. Grounding provides the LLM with the context to create personalized responses based on your accurate and up-to-date information. Sensitive data stays in Salesforce and isn't shared with the LLM. Your personally identifiable information data is masked, and it stays in Salesforce. The zero-retention agreement in the Einstein Trust Layer ensures that anything shared with the LLM isn't stored or used for training. For more information, see the The Einstein Trust Layer Trailhead module.

When you create a prompt template in Prompt Builder, you first choose an object, such as an account or contact, to associate with your template. For a field generation template, you also select the field that you want Einstein to help users complete.

As you write your prompt template in the Prompt Template Workspace, you can add more Salesforce **resources**. The three types of Salesforce **resources** that you can add to prompt templates in Prompt Builder are merge fields, flows, and Apex.

Merge Fields

Merge fields connect your prompt templates to Salesforce object fields. The prompt template type and the objects that you associated with your prompt template determine what merge fields are available.

Sales email prompt templates can have merge fields corresponding to these objects.

- Recipient (the contact or lead)
- Sender (the user)
- The user's Organization

Field generation prompt templates can have merge fields corresponding to these objects.

- User (the current user)
- The user's Organization
- The object that you associated with the prompt template

When you select a standard or custom object field in the Prompt Template Workspace, the field is added to your template as {!$RecordName.FieldName}. During prompt resolution, real CRM values populate the merge fields based on the specific records that your user selects.

For example, you have a prompt template that includes this sentence. You select the Astro's Bakery account record in Prompt Builder to associate it with your template, and then you run your template.

> You are a support representative and you need to create a short summary of all open cases for the {!$account.Name} account.

Prompt Builder replaces the {!$account.Name} merge field with the account name "Astro's Bakery." The resolved response could look like this.

> You are a support representative and you need to create a short summary of all open cases for the Astro's Bakery account.

To use merge fields in Prompt Builder, see:

- Add Merge Fields to a Sales Email Prompt Template
- Add Merge Fields to a Field Generation Prompt Template

Flows

Flows elevate your prompt templates beyond linking record fields. You can use Flow Builder to add complex logic to a prompt template. With flows, you can also access unified Data Cloud objects. By referencing Data Cloud data, you can use real-time information that was consolidated across multiple data sources. If you're new to flows or Data Cloud, check out the Flow Builder Basics and Salesforce Data Cloud: Quick Look Trailhead modules. To learn about data consolidation with Data Cloud, see Unify Source Profiles.

Before you can use a flow in Prompt Builder, first create the flow by selecting **Prompt Template Flow** in Flow Builder. A prompt template flow launches from a prompt template, and then it adds prompt instructions to the associated prompt template. Other flow types aren't available to prompt templates.

After you create a prompt template flow, use Flow Builder to add resources that match the object types associated with your prompt template. Then add elements to the flow. For example, you can add logic to your flow with a Decision element.

To reference Data Cloud data, use the Get Records element. In the Get Records element, select **Data Cloud Object** as your data source. Next, select the relevant data space or object, and specify filters to narrow your data. After that, use Data Cloud record data as you do with any record variable in the flow.

Then, use Create Prompt Instructions elements to write the prompt instructions that the flow returns to the associated prompt template. These prompt instructions can include merge fields for CRM and Data Cloud data based on the outcome of a Decision element. Each merge field returns a value as a string of text in the prompt instructions. For example, a {!Contact.MailingCity} merge field in the Create Prompt Instructions element returns "San Francisco" in the prompt instructions.

You can add a prompt template flow to your prompt template as a dynamic merge field with the format {!$Flow__FlowName.Prompt}. The flow runs each time a user uses the associated prompt template. Within the flow, each Create Prompt Instructions element adds prompt instructions to the $Prompt global variable. When the flow completes, all the prompt instructions saved in $Prompt are sent to the prompt template and populate the dynamic merge field as a string of text.

To use flows in Prompt Builder, see:

- Add Flows Without Data Cloud Objects to a Sales Email Prompt Template
- Add Flows Without Data Cloud Objects to a Field Generation Prompt Template

To use flows with Data Cloud objects in Prompt Builder, see:

- Add Flows with Data Cloud Objects to a Sales Email Prompt Template
- Add Flows with Data Cloud Objects to a Field Generation Prompt Template

Note: If you rename an input record in a flow after you've added the flow as a resource in a prompt template, you must remove the flow from the prompt template and add it back again.

1. Remove the flow resource reference from the prompt template.
2. Save the prompt template.
3. Add the flow as a resource in the prompt template.
4. Save the prompt template.

Apex

Use Apex in Prompt Builder to return data from a SOQL query or to return data from an external API. Apex is also effective if you want to generate well-formatted JSON or do programmatic data filtering.

To use Apex in Prompt Builder, create an Apex class with these requirements.

- The Apex class must contain one method annotated with `InvocableMethod`. For details, see the Apex Developer Guide.

- The method has either no parameters or one input parameter. The input parameter can have a `List<sObject>` type or a `List<Request>` type, where the `Request` has one member `sObject` variable annotated with `InvocableVariable`. Only the first element in the list has data.
- The method output has a `List<Response>` type, containing a single string member named `Prompt` that's annotated with `InvocableVariable`. For details, see the Apex Developer Guide.

In the Prompt Template Workspace, add an Apex class to a prompt template by clicking the **Resource** search bar and selecting **Apex**.

All parameterless Apex classes that satisfy the Apex class requirements for Prompt Builder are available for both types of templates in the Resource field.

The selection of Apex classes with an input parameter is contextual and based on the template type.

1. For the Sales Email type, only Apex classes taking the same type of input parameter as the **Recipient Type** in the prompt template are available in the **Resource** field. For example, if you have a **Recipient Type** of Lead in the prompt template, only Apex classes taking an input parameter type of Lead are available in the **Resource** field.
2. For the Field Generation type, only Apex classes taking the same type of input parameter as the **Related Object** in the prompt template are available in the **Resource** field.

To use Apex in Prompt Builder, see:

- Add Apex to a Sales Email Prompt Template
- Add Apex to a Field Generation Prompt Template

Best Practices for Building Prompt Templates

Learn the best practices for building effective prompt templates.

- Make sure that your prompt templates are concise and easy to understand. Avoid using industry jargon or technical terms. Instead, use natural language and conversation design guidelines.

- To give the LLM more contextual information, ask it to role play as a character, such as a sales or support representative. Then define the character's goal. For example, include language such as, “You are a marketing executive who wants to invite major customers to a live event.”

- Iterate on your prompt templates. Try achieving the same goal using different templates to see how the parts impact the model's response. Get end-user feedback to see how well your prompt templates generate the desired response.

- Choose a style, and stick to it. When you use a consistent writing style in your prompt templates, the LLM generates consistent responses. Your writing style is shaped by your word choice, intensifiers, emojis, and punctuation.

- To help the LLM differentiate between context and instructions, create an instructions section in your prompt template. On a separate line, enter `Instructions:`, then surround your instructions with triple quotes (`"""`).

- Include direct instructions for the LLM to only generate the expected type of content. For example, if you want the LLM to draft an email, add instructions such as, "Follow these instructions strictly to generate only the message to be sent to the customer." These instructions prevent the LLM from generating a response about the process of creating content, instead of just generating the content that you want.

- Start with one of the templates in the Example Prompt Template Library, and customize it to fit your specific needs. Study the language that the templates use, especially the text related to writing style. You can use similar phrasing in your own templates.

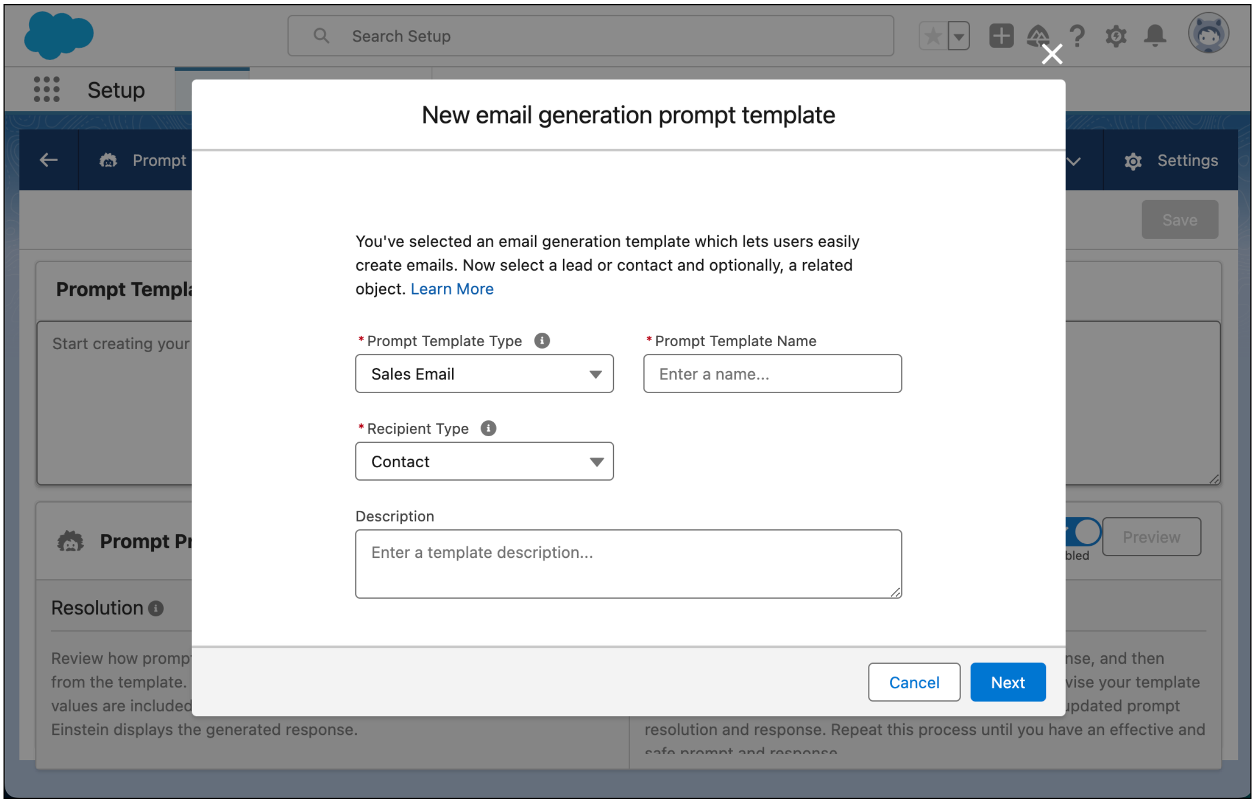
Create a Sales Email Prompt Template

Want to connect with customers using emails that leverage your customer relationship history and insights? To generate personalized, targeted emails at scale, design a sales email prompt template. Because you can reuse your template for different products and customers, getting an LLM to write your emails saves you time and makes email workflows easier.

Before you can build sales email prompt templates, you must turn on Sales Emails in Setup and then assign a permission set to your users. For information about assigning Einstein for Sales permission sets, see Set Up Sales Emails.

To create a Sales Email prompt template:

1. In Setup, use Search to find and open the **Prompt Builder** landing page.
2. Click **New Prompt Template**.
    a. In the Prompt Template Type dropdown, select **Sales Email**.
    b. Specify your Prompt Template Name. The Prompt Template Name and optional Description that you choose appear in the list of custom email types that your users can choose from in email composer.
    c. Select a **Recipient Type** to define who the email is for.
    d. Optionally, you can write a Description for your prompt template.
3. Click **Next**, and you're redirected to the Prompt Template Workspace.



New email generation prompt template

You've selected an email generation template which lets users easily create emails. Now select a lead or contact and optionally, a related object. Learn More

*Prompt Template Type: Sales Email

*Prompt Template Name: Enter a name...

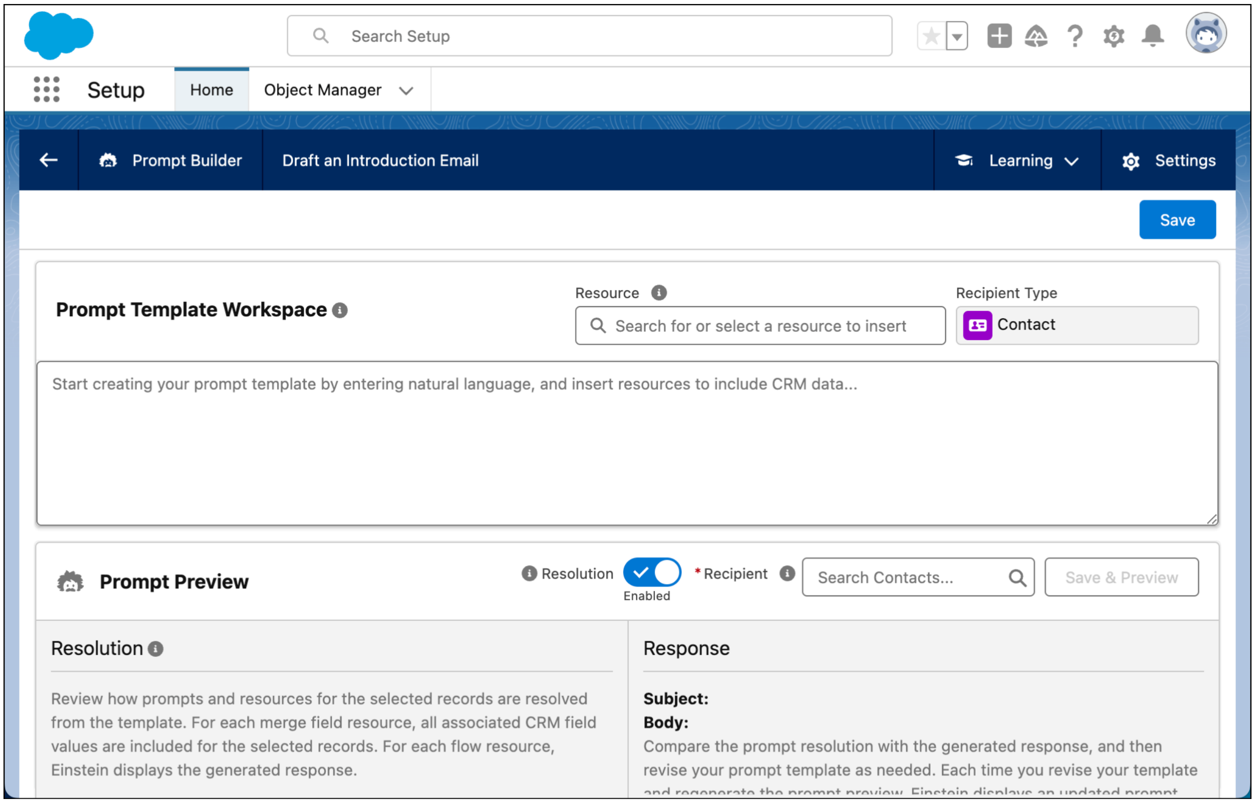
*Recipient Type: Contact

Description: Enter a template description...

The Prompt Template Workspace is where you edit your prompt template. Here, you can write a template from scratch or copy and paste an example template.

To run a prompt template and preview the generated response:

1. In the Prompt Preview section, search for and select a Recipient. Available options are defined by the recipient object that you selected in the Create Prompt Template window.
2. Click **Preview**.
3. Review the LLM's generated email in the Response section.



Start creating your prompt template by entering natural language, and insert resources to include CRM data...

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.

Subject:
Body:
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

Add Merge Fields to a Sales Email Prompt Template

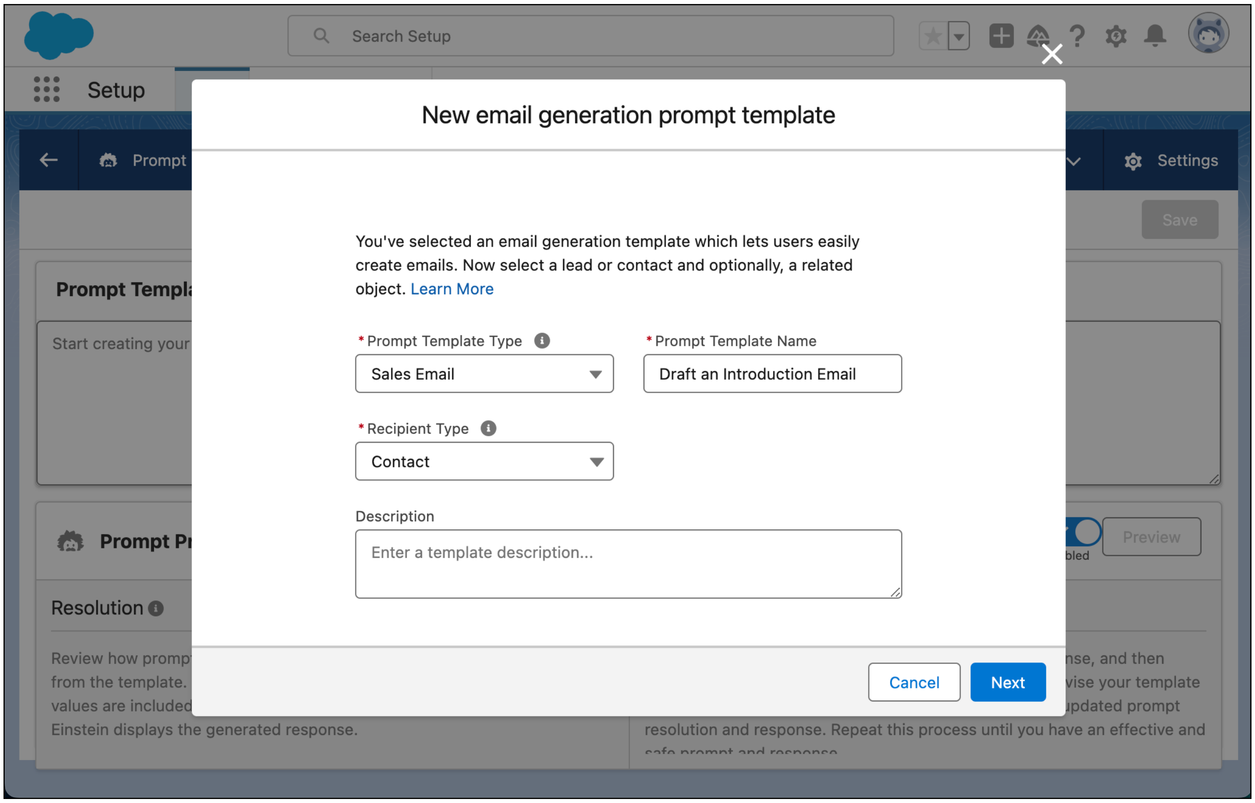
Merge fields are critical to scaling a prompt template for multiple customers and products. They connect your prompt templates to Salesforce record fields, such as from sales or service records. In a prompt template, a merge field acts like a placeholder. After you run the template, the LLM replaces the merge field with your actual data.

To add a merge field to a prompt template in Prompt Builder, click the **Resource** search bar and select a resource from the dropdown menu of placeholder values for your CRM data.

Let's look at a sales email prompt template that uses merge fields. Say you work at a company that regularly informs customers about new products using product descriptions. Your copywriting team spends a significant amount of time writing these descriptions from scratch for every new product.

Using an LLM to write these descriptions is more efficient, and the LLM can use your up-to-the-minute data to create content. To get started, create a prompt template.

1. In the Prompt Template Type dropdown, select **Sales Email**.
2. For the Prompt Template Name, enter `Draft an Introduction Email`.
3. For the Recipient Type, select **Lead** or **Contact**.
4. Leave the Description field blank**.**
5. Click **Next**, and you're redirected to the Prompt Template Workspace.



New email generation prompt template

You've selected an email generation template which lets users easily create emails. Now select a lead or contact and optionally, a related object. Learn More

*Prompt Template Type: Sales Email

*Prompt Template Name: Draft an Introduction Email

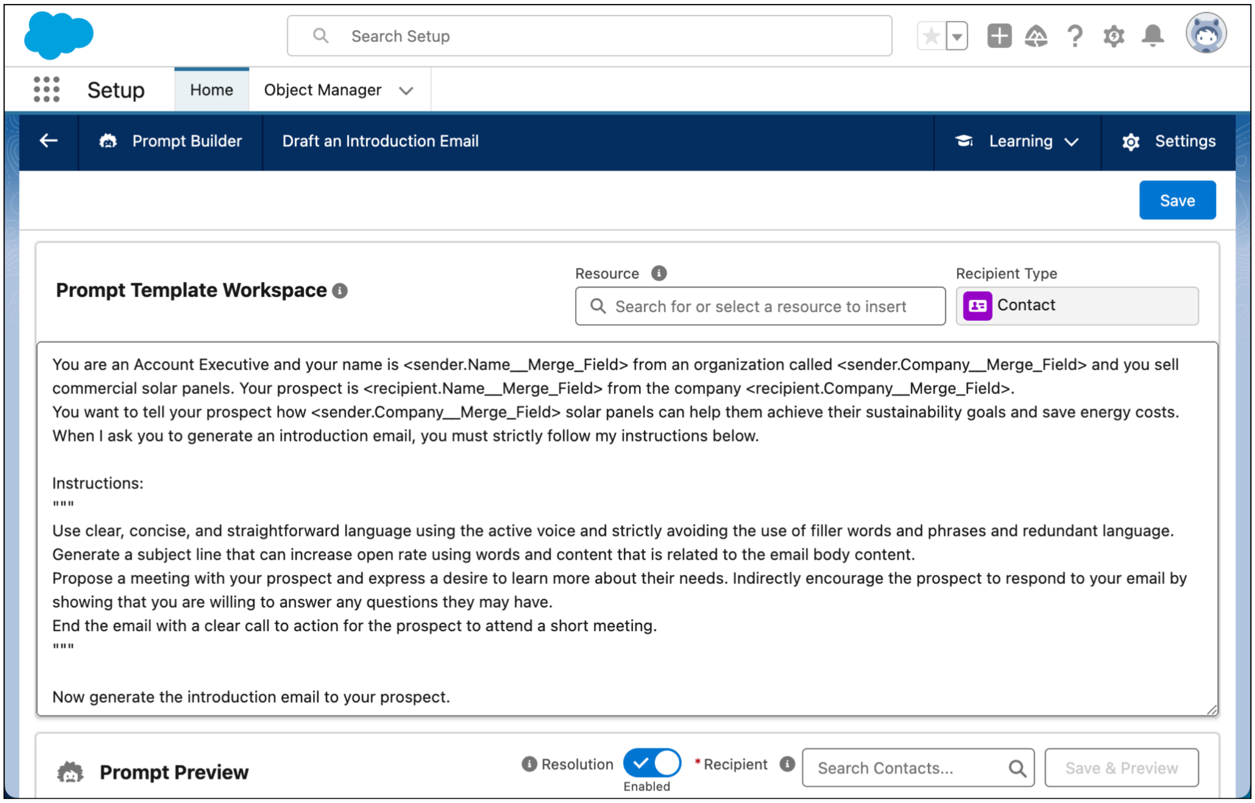
*Recipient Type: Contact

Description: Enter a template description...

In the Example Prompt Template Library, find the field generation prompt template Draft an introduction email for a new lead or contact. Copy and paste this template into the Prompt Template Workspace.

This example contains placeholder text for prompt template resources. Before you can run this template in Prompt Builder, use the Resource field to replace the placeholders with real merge fields. When the template is resolved into a prompt, the merge fields are replaced with the real email sender's name, recipient's name, and recipient's company name.

A finished version of this template looks like this.



You are an Account Executive and your name is <sender.Name__Merge_Field> from an organization called <sender.Company__Merge_Field> and you sell commercial solar panels. Your prospect is <recipient.Name__Merge_Field> from the company <recipient.Company__Merge_Field>.
You want to tell your prospect how <sender.Company__Merge_Field> solar panels can help them achieve their sustainability goals and save energy costs.
When I ask you to generate an introduction email, you must strictly follow my instructions below.

Instructions:
"""
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
Generate a subject line that can increase open rate using words and content that is related to the email body content.
Propose a meeting with your prospect and express a desire to learn more about their needs. Indirectly encourage the prospect to respond to your email by showing that you are willing to answer any questions they may have.
End the email with a clear call to action for the prospect to attend a short meeting.
"""

Now generate the introduction email to your prospect.

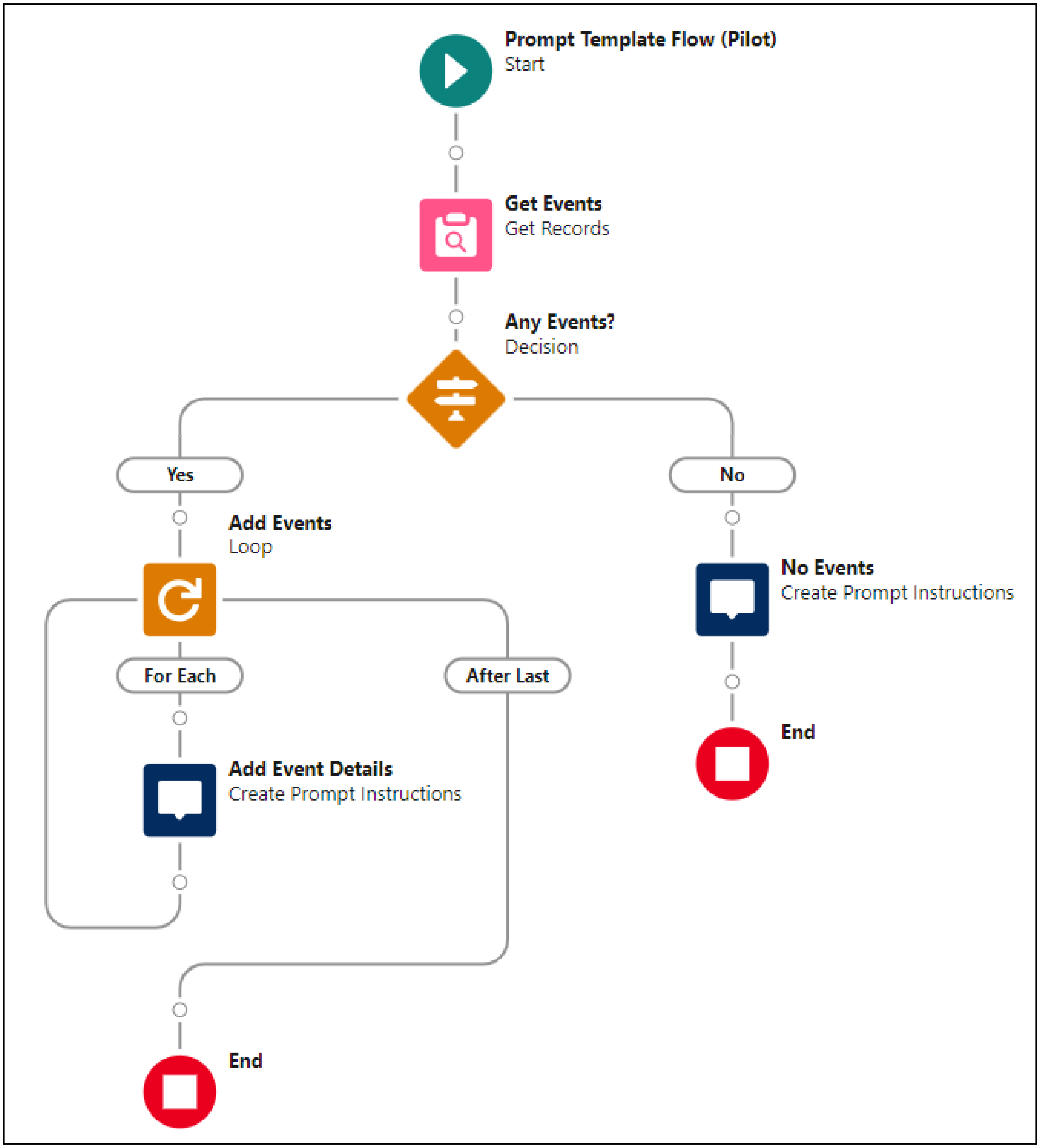
To run the prompt template and see the LLM-generated email draft:

1. In the Prompt Preview section, enter a real contact name in the Recipient search bar and select it. This selection defines the recipient of the LLM-generated email draft.
2. Click **Save & Preview**, and review the **Response**.

Add Flows Without Data Cloud Objects to a Sales Email Prompt Template

Let's create and preview an example email prompt template that uses a flow. Say you're a Salesforce admin, and your sales team requests an easier way to send emails to contacts about nearby Marketing events.

You create an email prompt template that launches a prompt template flow to get Marketing events in the same city and state as your contact. And you draft an email for contacts about nearby Marketing events. We use a flow to get a list of events and their locations for the LLM. In Flow Builder, the flow looks like this.



1. From Setup, in the Quick Find box, enter `Flows`, and then click **Flows**.
2. Click **New Flow**.
3. From Flow Builder, select **Prompt Template Flow (Pilot)**, and click **Create**.
4. Create a flow resource that matches the recipient object that you plan to associate with your sales email prompt template. If the flow doesn't contain a flow resource that's the same data type as the object associated with the template, the flow isn't available to use in the template.

   a. Click ◧.
   b. Click **New Resource**.
   c. For Resource Type, select **Variable**.
   d. Enter an API name, such as `Contact`.
   e. For Data Type, select **Record**.
   f. For Object, select **Contact**.
   g. Select **Available for input**.
   h. Click **Done**.

5. Add the Get Records element and configure it.
   a. For Label, enter `Get Events`.
   b. For Object, select **Event**.
   c. For Condition Requirements, select **All Conditions Are Met (AND)**.
   d. For Field, select **IsArchived**.
   e. For Operator, select **Equals**.
   f. For Value, select **$GlobalConstant.False**.
   g. Click **Add Condition**.
   h. For Field, select **Location**.
   i. For Operator, select **Contains**.
   j. For Value, select **Contact** then **MailingCity**.
   k. Click **Add Condition**.
   l. For Field, select **Location**.
   m. For Operator, select **Contains**.
   n. For Value, select **Contact** and then **MailingState**.
   o. For How Many Records to Store, click **All Records**.
6. Add the Decision element.
   a. For Label, enter `Any Events?`
   b. On New Outcome, for Label, enter `Yes.`
   c. For Condition Requirements to Execute Outcome, select **All Conditions Are Met (AND)**.
   d. For Resource, select **Events from Get_Events**.
   e. For Operator, select **Is Null**.
   f. For Value, select **$GlobalConstant.False**.
   g. Click **Default Outcome**.
   h. For Label, delete the text, and enter `No.`
7. For the No outcome path, add the Create Prompt Instructions element.
   a. For Label, enter `No Events.`
   b. For Prompt Instructions, enter `No upcoming Marketing events near you.`
8. For the Yes outcome path, add the Loop element.
   a. For Label, enter `Add Events.`
   b. For Collection Variable, select **Events from Get Events**.
9. On the For Each path, add the Prompt Instructions element.
   a. For Label, enter `Add Event Details`.
   b. For Prompt Instructions, enter:

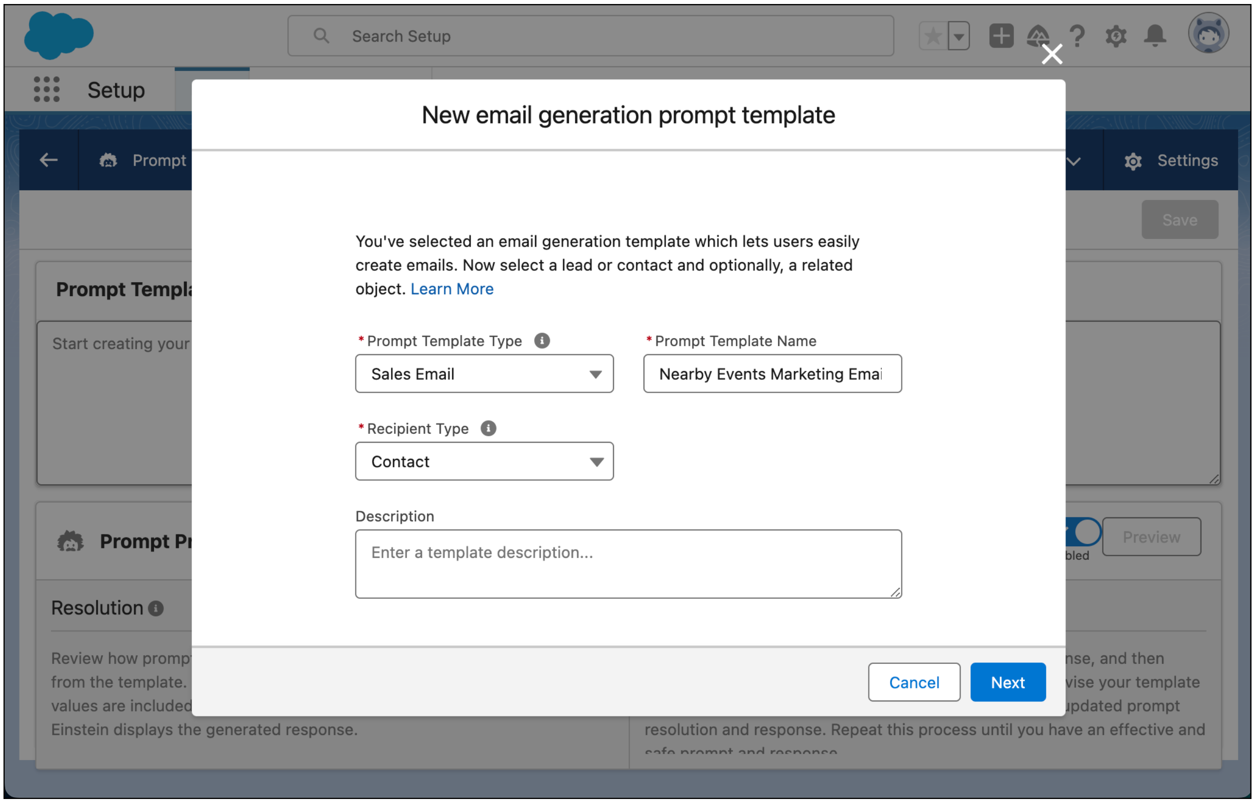
```
Event details: {!Add_Events.Subject}, {!Add_Events.Description},
{!Add_Events.Location},

Start Time: {!Add_Events.StartDateTime}.
```

10. Click **Save**.
11. For Flow Label, enter `Marketing Events Summary`.
12. Save your changes, and click **Activate**.

Now that the prompt template flow is ready, let's use an example prompt template that uses merge fields and your new flow to generate an email about nearby Marketing events for a selected contact.

In Prompt Builder, create a prompt template.

1. In the Prompt Template Type dropdown, select **Sales Email**.
2. For the Prompt Template Name, enter `Nearby Events Marketing Email`.
3. For the Recipient Type, select **Contact**. Remember that to insert a prompt template flow into a prompt template, the prompt template flow's Recipient Type has to be the same data type as the prompt template's flow resource.
4. Leave the Description blank.
5. Click **Next**, and you're redirected to the Prompt Template Workspace.



New email generation prompt template

You've selected an email generation template which lets users easily create emails. Now select a lead or contact and optionally, a related object. Learn More

*Prompt Template Type: Sales Email

*Prompt Template Name: Nearby Events Marketing Emai

*Recipient Type: Contact

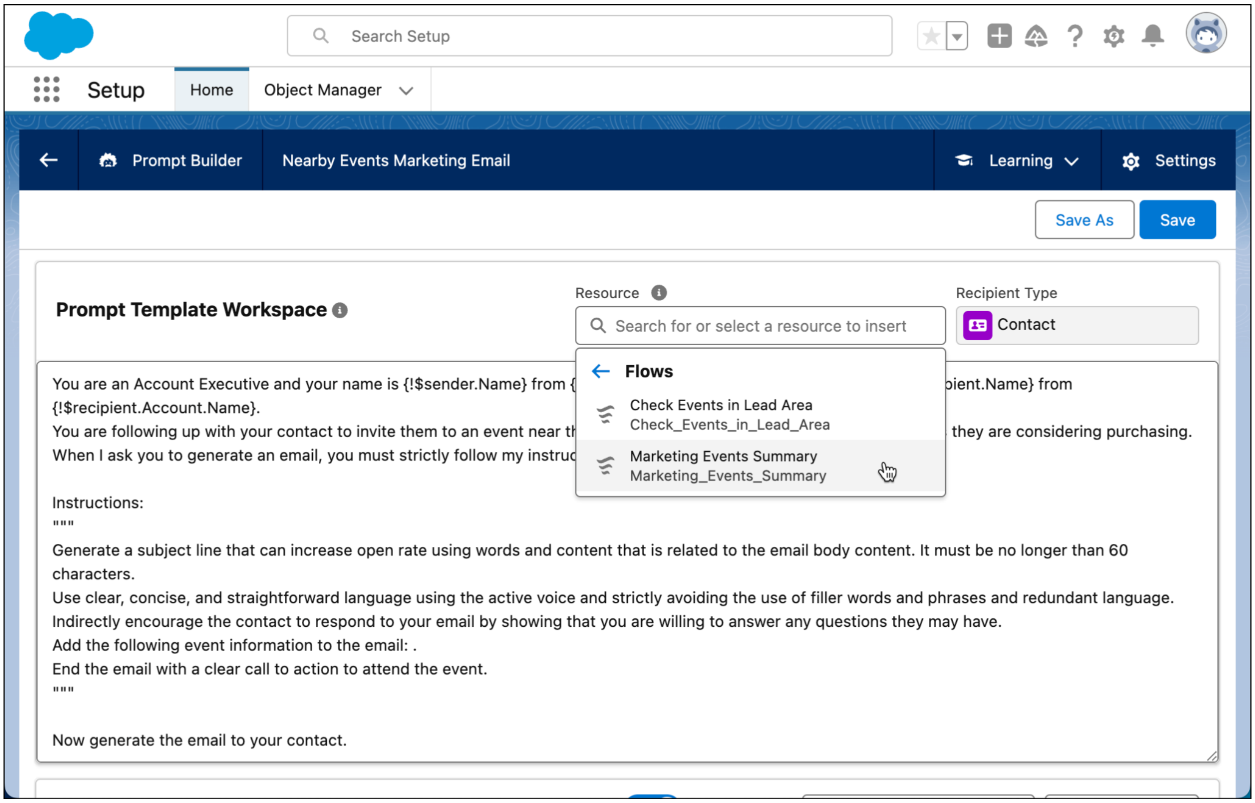
Description: Enter a template description...

Cancel | Next

In the [Example Prompt Template Library](), find the sales email prompt template [Draft an email for a contact about regional marketing events](). Copy and paste this template into the Prompt Template Workspace.

Before you can run this template in Prompt Builder, use the Resource field to replace the placeholders with real merge fields and a reference to a flow. First, replace the merge field placeholders with real merge fields. Then, let's add a reference to the real Marketing Events Summary prompt template flow that you created.

1. In the Prompt Template Workspace, delete the <Get_Events_Near_Contact__Prompt__Flow> placeholder.
2. Click the **Resource** search bar and select **Flows**.
3. To add this flow to your template, select **Marketing Events Summary**.

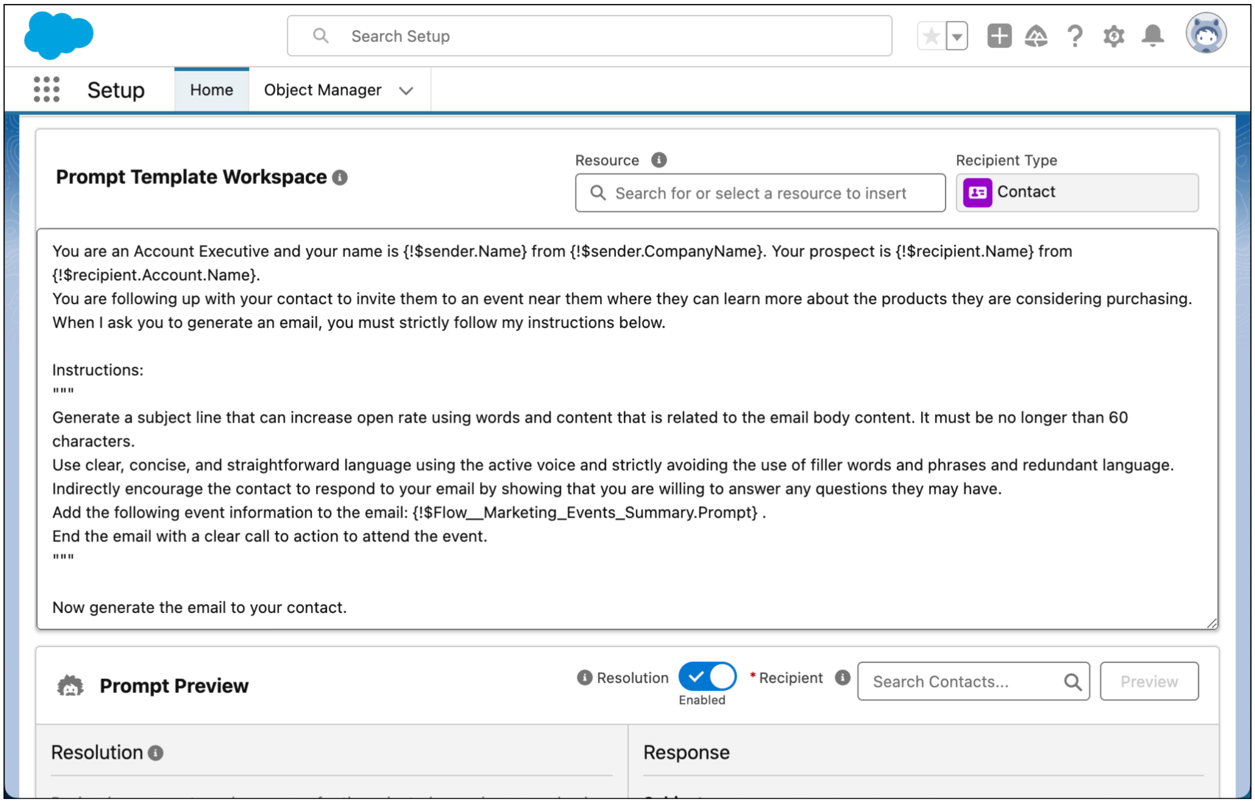


You are an Account Executive and your name is {!$sender.Name} from { … pient.Name} from
{!$recipient.Account.Name}.
You are following up with your contact to invite them to an event near th … they are considering purchasing.
When I ask you to generate an email, you must strictly follow my instruc

Instructions:
"""
Generate a subject line that can increase open rate using words and content that is related to the email body content. It must be no longer than 60 characters.
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
Indirectly encourage the contact to respond to your email by showing that you are willing to answer any questions they may have.
Add the following event information to the email: .
End the email with a clear call to action to attend the event.
"""

Now generate the email to your contact.

A finished version of this template could look like this.



You are an Account Executive and your name is {!$sender.Name} from {!$sender.CompanyName}. Your prospect is {!$recipient.Name} from {!$recipient.Account.Name}.
You are following up with your contact to invite them to an event near them where they can learn more about the products they are considering purchasing.
When I ask you to generate an email, you must strictly follow my instructions below.

Instructions:
"""
Generate a subject line that can increase open rate using words and content that is related to the email body content. It must be no longer than 60 characters.
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
Indirectly encourage the contact to respond to your email by showing that you are willing to answer any questions they may have.
Add the following event information to the email: {!$Flow__Marketing_Events_Summary.Prompt} .
End the email with a clear call to action to attend the event.
"""

Now generate the email to your contact.

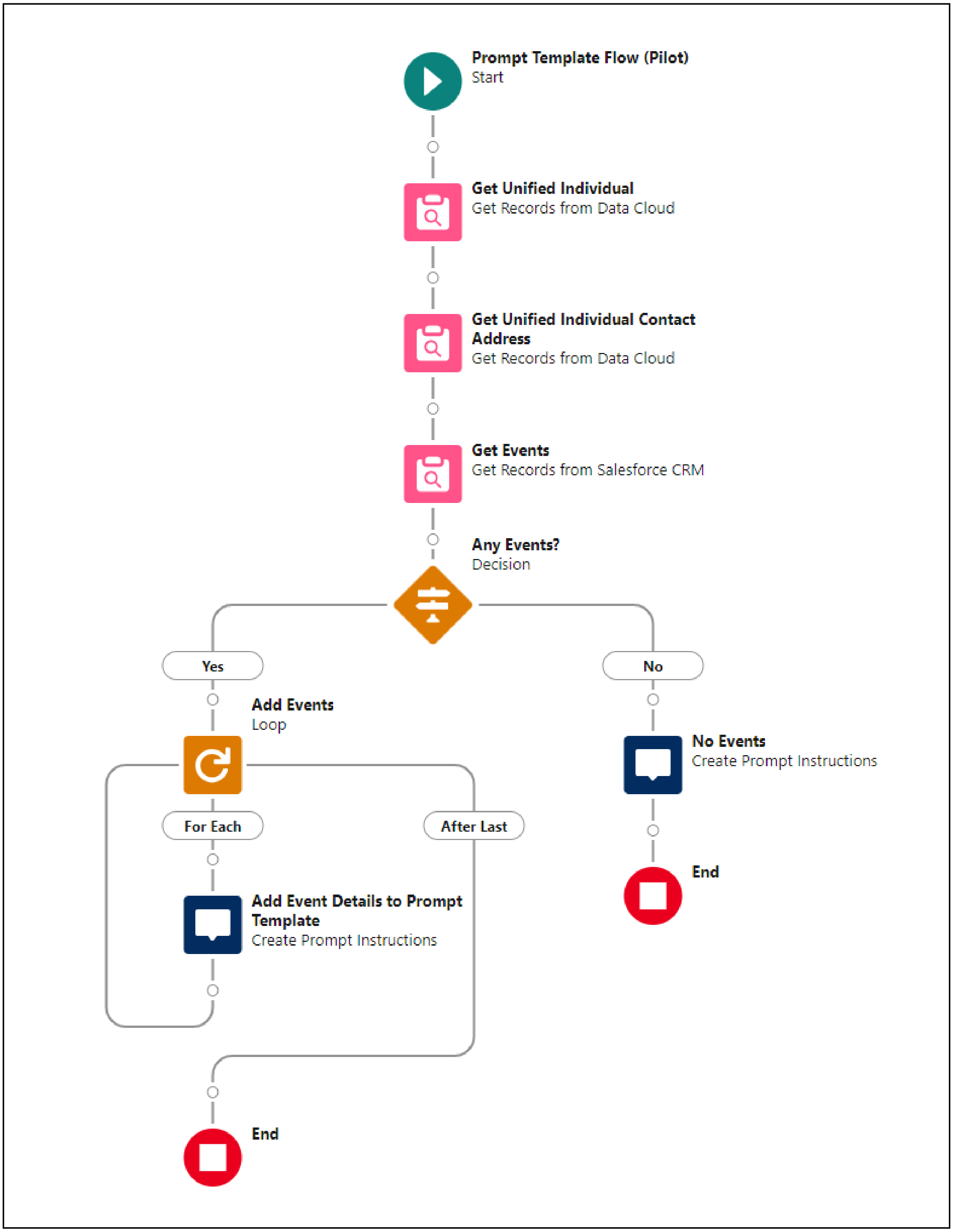
To run the prompt template and see the LLM-generated email draft:

1. In the Prompt Preview section, enter a real contact name in the Recipient search bar and select it. This selection defines the recipient of the LLM-generated email draft.
2. Click **Save & Preview**, and review the **Response**.

Add Flows with Data Cloud Objects to a Sales Email Prompt Template

Remember our example about marketing events in the Add Flows Without Data Cloud Objects to a Sales Email Prompt Template section? Now your sales team wants to use Data Cloud data to get information about your contact's location. By using Data Cloud data, we can use information that was consolidated across multiple data sources. This information can be more up to date than the contact record alone. To learn about data consolidation, see Unify Source Profiles. This example uses the standard data bundles for the Salesforce CRM connector. Your Data Cloud setup, objects, and fields can differ.

Once again, you create an email prompt template that launches a prompt template flow to get Marketing events in the same city and state as your contact. And you draft an email for contacts about nearby Marketing events. We use a flow to get a list of events and their locations for the LLM. In Flow Builder, the flow looks like this.



Prompt Template Flow (Pilot)
Start
Get Unified Individual
Get Records from Data Cloud
Get Unified Individual Contact Address
Get Records from Data Cloud
Get Events
Get Records from Salesforce CRM
Any Events?
Decision
Yes
No
Add Events
Loop
No Events
Create Prompt Instructions
For Each
After Last
End
Add Event Details to Prompt Template
Create Prompt Instructions
End

1. From Setup, in the Quick Find box, enter `Flows`, and then click **Flows**.

2. Click **New Flow**.
3. From Flow Builder, select **Prompt Template Flow (Pilot)**, and click **Create**.
4. Create a flow resource that matches the recipient object that you plan to associate with your sales email prompt template. If the flow doesn't contain a flow resource that's the same data type as the object associated with the template, the flow isn't available to use in the template.
    a. Click ◧.
    b. Click **New Resource**.
    c. For Resource Type, select **Variable**.
    d. Enter an API name, such as `Contact`.
    e. For Data Type, select **Record**.
    f. For Object, select **Contact**.
    g. Select **Available for input**.
    h. Click **Done**.
5. Add the Get Records element. This Get Records element finds the unified individual data from Data Cloud that matches the contact information.
    a. For Label, enter `Get Unified Individual`.
    b. For Data Source, select **Data Cloud Object**.
    c. For Data Space, select the data space you want to use, for example **default**.
    d. For Object, select your unified individual data model object (DMO), for example **Unified Individual 0000**.
    e. For Condition Requirements, select **All Conditions Are Met (AND)**.
    f. For Field, select the field that represents the contact's first name, for example **ssot_FirstName__c**.
    g. For Operator, select **Equals**.
    h. For Value, select **{!Contact.FirstName}**.
    i. Click **Add Condition**.
    j. For Field, select the field that represents the contact's first name, for example **ssot_LastName__c**.
    k. For Operator, select **Equals**.
    l. For Value, select **{!Contact.LastName}**.
    m. Click **Add Condition**.
    n. For Field, select the field that represents the contact's birth date, for example **ssot_BirthDate__c**.
    o. For Operator, select **Equals**.
    p. For Value, select **{!Contact.Birthdate}**.
    q. For How Many Records to Store, click **Only the first record**.
6. Add another Get Records element to get the unified individual's contact information.
    a. For Label, enter `Get Unified Individual Contact Address`.
    b. For Data Source, select **Data Cloud Object**.
    c. For Data Space, select the same data space as before.
    d. For Object, select your unified individual contact point address DMO, for example **Unified Indv Contact Point Address 0000**.
    e. For Condition Requirements, select **All Conditions Are Met (AND)**.
    f. For Field, select **ssot_Id__c**.
    g. For Operator, select **Equals**.
    h. For Value, select **{!Get_Unified_Individual.ssot__Id__c}**.

    i. For How Many Records to Store, click **Only the first record**.

7. Add the Get Records element to get event data.
    a. For Label, enter `Get Events`.
    b. For Object, select **Event**.
    c. For Condition Requirements, select **All Conditions Are Met (AND)**.
    d. For Field, select **IsArchived**.
    e. For Operator, select **Equals**.
    f. For Value, select **$GlobalConstant.False**.
    g. Click **Add Condition**.
    h. For Field, select **Location**.
    i. For Operator, select **Contains**.
    j. For Value, select **{!Get_Unified_Individual_Contact_Address.ssot__CityId__c}**.
    k. Click **Add Condition**.
    l. For Field, select **Location**.
    m. For Operator, select **Contains**.
    n. For Value, select **{!Get_Unified_Individual_Contact_Address.ssot__StateProvinceId__c}**.
    o. For How Many Records to Store, click **All Records**.
8. Add the Decision element.
    a. For Label, enter `Any Events?`
    b. On New Outcome, for Label, enter `Yes`.
    c. For Condition Requirements to Execute Outcome, select **All Conditions Are Met (AND)**.
    d. For Resource, select **Events from Get_Events**.
    e. For Operator, select **Is Null**.
    f. For Value, select **$GlobalConstant.False**.
    g. Click **Default Outcome**.
    h. For Label, delete the text, and enter `No`.
9. For the No outcome path, add the Create Prompt Instructions element.
    a. For Label, enter `No Events`.
    b. For Prompt Instructions, enter `No upcoming Marketing events near you`.
10. For the Yes outcome path, add the Loop element.
    a. For Label, enter `Add Events`.
    b. For Collection Variable, select **Events from Get Events**.
11. On the For Each path, add the Prompt Instructions element.
    a. For Label, enter `Add Event Details to Prompt Template`.
    b. For Prompt Instructions, enter:

```
Event details: {!Add_Events.Subject}, {!Add_Events.Description},
{!Add_Events.Location},

Start Time: {!Add_Events.StartDateTime}.
```

12. Save your changes, and click **Activate**.

Now, you can insert the prompt template flow into the sales email prompt template Draft an email for a contact about regional marketing events from the Example Prompt Template Library. For a step-by-step guide to adding a prompt template flow to a sales email prompt template, see [Add Flows Without Data Cloud Objects to a Sales Email Prompt Template](#).

Add Apex to a Sales Email Prompt Template

Let’s create an example email prompt template that uses Apex. Say you’re a Salesforce admin, and your sales team requests an easier way to send emails to contacts about nearby Marketing events. We used the same use case in the flow section.

This time, you create an email prompt template that launches an Apex class to get Marketing events in the same city and state as your contact. And you draft an email for contacts about nearby Marketing events. The Apex class gets a list of events and their locations for the LLM.

Here’s the Apex class that we access as a resource in a prompt template.

```
public class ContactEventsPrompt {
  @InvocableMethod(label='Contact Events' description='Find Events for a
Contact')
  public static List<Response> getContactsPrompt(List<Contact> contacts) {
    // validate the expected number of contacts as an input
    Assert.areEqual(1, contacts.size());
    Contact c = contacts[0];
    // Protect against SOQL Injection
    string searchCity = '%' + c.MailingCity + '%';
    string searchState = '%' + c.MailingState + '%';
    List<Event> events =
        [SELECT Id, Subject, Description, Location, StartDateTime
         FROM Event
         WHERE IsArchived = false and Location LIKE :searchCity
            and Location LIKE :searchState with USER_MODE];
    string responseData = '';

    if(events.isEmpty()) {
        responseData = 'No upcoming Marketing events near you.';
    } else {
        for(Event e : events) {
            responseData += 'Event details: ';
            responseData += e.Subject;
            responseData += ', ';
            responseData += e.Description;
            responseData += ', ';
            responseData += e.Location;
            responseData += '/nStart Time: ';
            responseData += e.StartDateTime.format();
            responseData += '.';
        }
    }
    List<Response> responses = new List<Response>();
    Response res = new Response();
    res.Prompt = responseData;
    responses.add(res);
    return responses;
  }

  public class Response {
    @InvocableVariable(required=true)
    public String Prompt;
  }
}
```

The requirements for the Apex class are explained in Ground Prompt Templates with Salesforce Resources.

This test class isn't required, but test coverage is important. The test class simulates data sent from Prompt Builder. Two test cases are provided: one for when events are found, and one for when there are no events.

```
@IsTest
public class ContactEventsPrompt_Test {
    @IsTest
    public static void noEventsForContactResponse() {
        List<Contact> contactsInput = new List<Contact>();
        contactsInput.add(new Contact());
        List<ContactEventsPrompt.Response> responses =
            ContactEventsPrompt.getContactsPrompt(contactsInput);
        Assert.areEqual(1, responses.size());
        ContactEventsPrompt.Response response = responses[0];
        Assert.areEqual('No upcoming Marketing events near you.',
            response.Prompt);
    }

    @IsTest
    public static void findMatchingEventsForContact() {
        Contact c = new Contact(LastName='TestContact',
            MailingCity='San Francisco', MailingState='CA');
        insert c;
        Event e = new Event(Subject='Test Event', Description='Big Event',
            Location='415 Mission St, San Francisco, CA 94105, USA',
            StartDateTime=DateTime.newInstance(2023,09,28),
            DurationInMinutes=5 );
        insert e;
        List<Contact> contactsInput = new List<Contact>{c};
        Test.startTest();
        List<ContactEventsPrompt.Response> responses =
            ContactEventsPrompt.getContactsPrompt(contactsInput);
        Test.stopTest();
        Assert.areEqual(1, responses.size());
        ContactEventsPrompt.Response response = responses[0];
        Assert.areEqual('Event details: Test Event, Big Event, 415 Mission St,
San Francisco, CA 94105, USA/nStart Time: 28/09/2023 12:00 AM.',
            response.Prompt);
    }
}
```

Now that the Apex class is ready, let's call it from Prompt Builder.

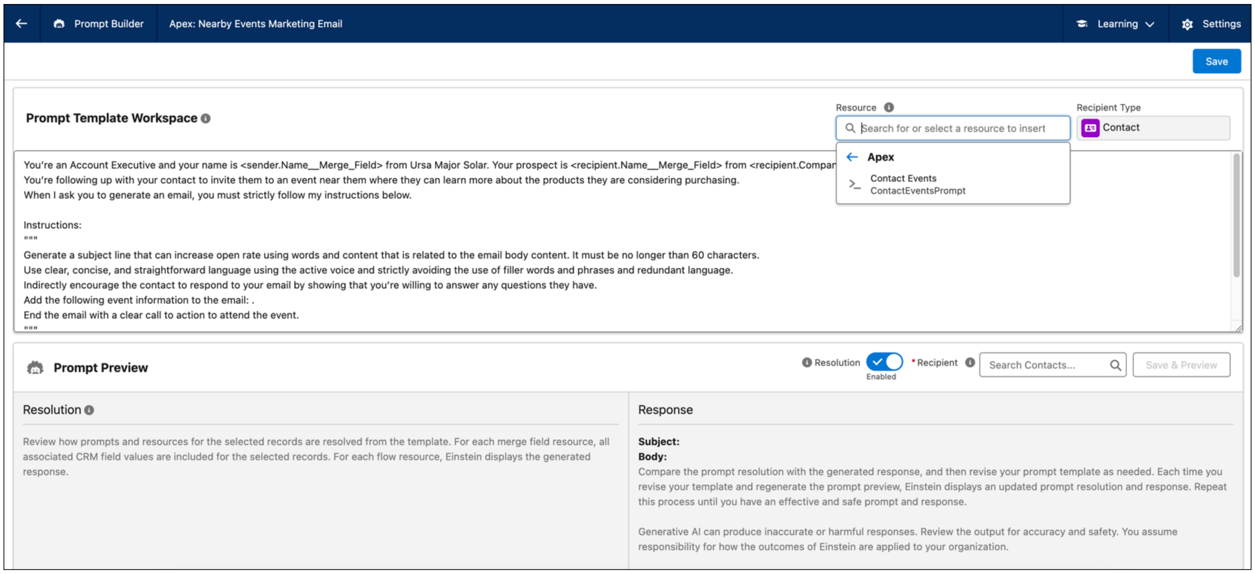
In Prompt Builder, create a new prompt template.

1. In the Prompt Template Type dropdown, select **Sales Email**.
2. For the Prompt Template Name, enter `Apex: Nearby Events Marketing Email`.
3. For the **Recipient Type**, select **Contact**.
4. Leave the **Description** fields blank.
5. Click **Create**, and you're redirected to the Prompt Template Workspace.

In the Example Prompt Template Library, find the sales email prompt template Draft an email for a contact about regional marketing events. Copy and paste this template into the Prompt Template Workspace.

Before you can run this template in Prompt Builder, use the Resource field to replace the placeholders with real merge fields and a reference to Apex. First, replace the merge field placeholders with real merge fields. Then, add a reference to the real ContactEventsPrompt Apex class that you created.

4. In the Prompt Template Workspace, delete the <Get_Events_Near_Contact__Prompt__Flow> placeholder.
5. Click the **Resource** search bar, and select **Apex**.
6. Select **Contact Events** to add the `ContactEventsPrompt` Apex class to your template. Contact Events is the label attribute that you set in the `@InvocableMethod` annotation in the `ContactEventsPrompt` Apex class.



```
You're an Account Executive and your name is <sender.Name__Merge_Field> from Ursa Major Solar. Your prospect is <recipient.Name__Merge_Field> from <recipient.Compar
You're following up with your contact to invite them to an event near them where they can learn more about the products they are considering purchasing.
When I ask you to generate an email, you must strictly follow my instructions below.

Instructions:
"""
Generate a subject line that can increase open rate using words and content that is related to the email body content. It must be no longer than 60 characters.
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
Indirectly encourage the contact to respond to your email by showing that you're willing to answer any questions they have.
Add the following event information to the email: .
End the email with a clear call to action to attend the event.
"""
```

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.

Subject:
Body:
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.

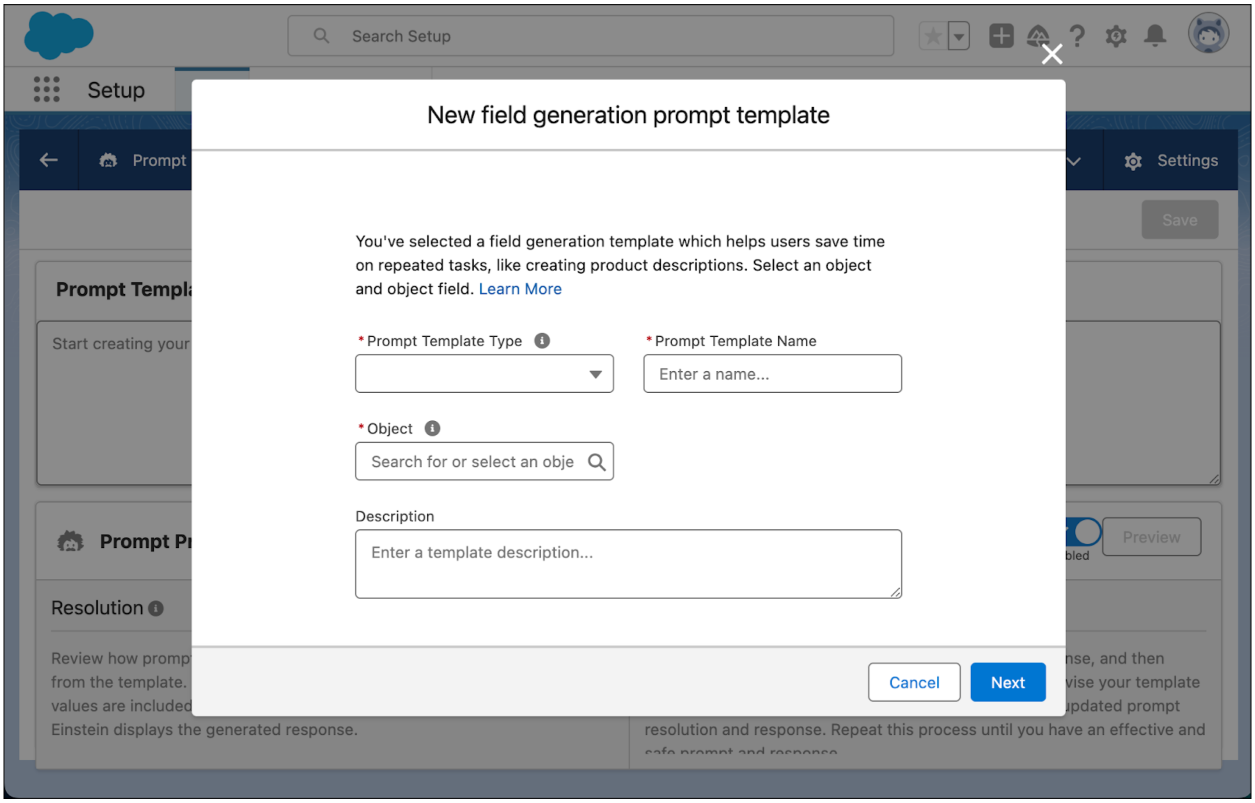
The Apex class is inserted into the prompt template as `{!$Apex__ContactEventsPrompt.Prompt}`.

Create a Field Generation Prompt Template

Does your business write content like summaries or press releases based on CRM data at scale? Field generation can save time on repeated tasks, such as creating product descriptions with AI. With an LLM, field generation prompt templates use AI to generate content and bring it within Lightning Experience fields on desktop or mobile.

To create a field generation prompt template:

1. In Setup, use Search to find and open the **Prompt Builder** landing page.
2. Click **New Prompt Template**.
    a. In the Prompt Template Type dropdown, select **Field Generation**.
    b. Specify your Prompt Template Name.
    c. Select an **Object** containing the field that you want Einstein to populate. For example, if you want help creating product descriptions, select **Product**.
    d. Select an **Object Field**. This field is the one that you want Einstein to populate.
    e. Optionally, you can write a Description for your prompt template.
3. Click **Create**, and you're redirected to the Prompt Template Workspace.



New field generation prompt template

You've selected a field generation template which helps users save time on repeated tasks, like creating product descriptions. Select an object and object field. Learn More

*Prompt Template Type

*Prompt Template Name: Enter a name...

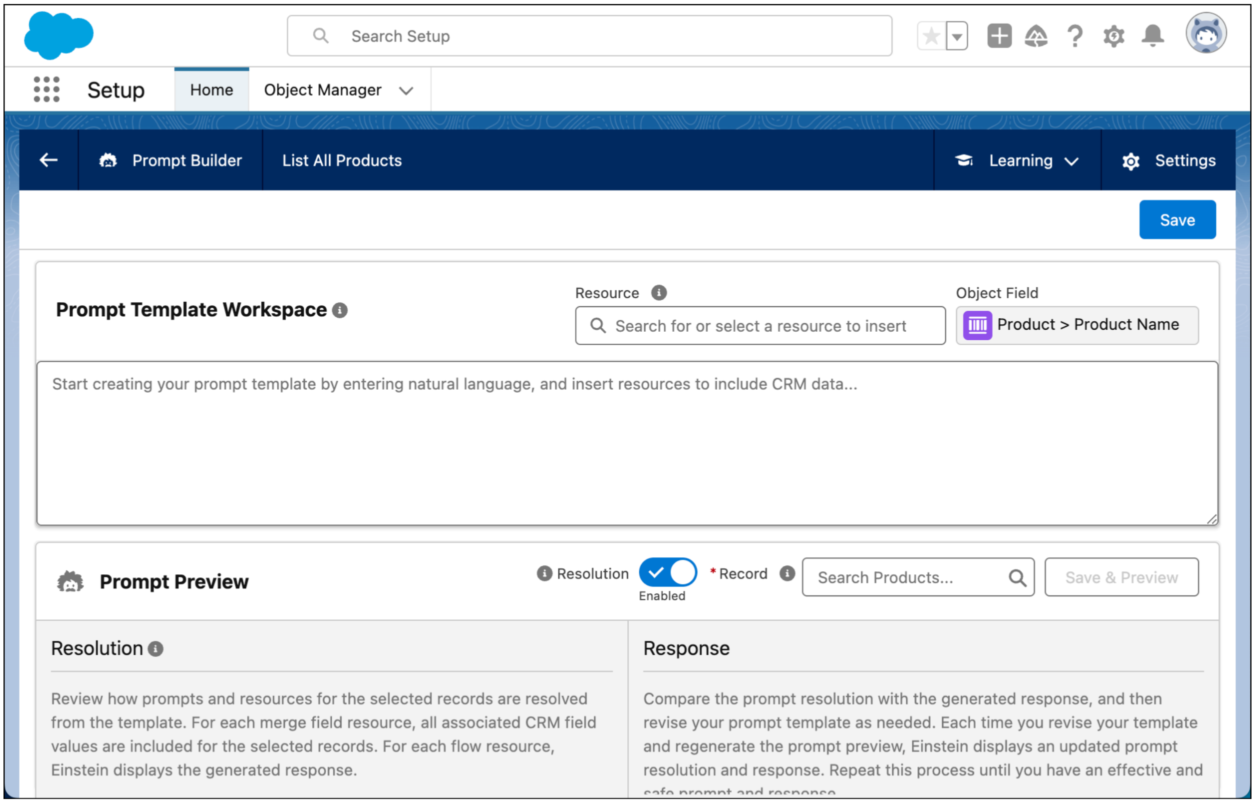
*Object: Search for or select an obje

Description: Enter a template description...

In the Prompt Template Workspace, create your prompt template.

To run a prompt template and see the LLM's response:

1. In the Prompt Preview section, select a Record. Available options depend on which object you selected in the Create Prompt Template window.
2. Click **Save & Preview**, and review the **Response**.



Start creating your prompt template by entering natural language, and insert resources to include CRM data...

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

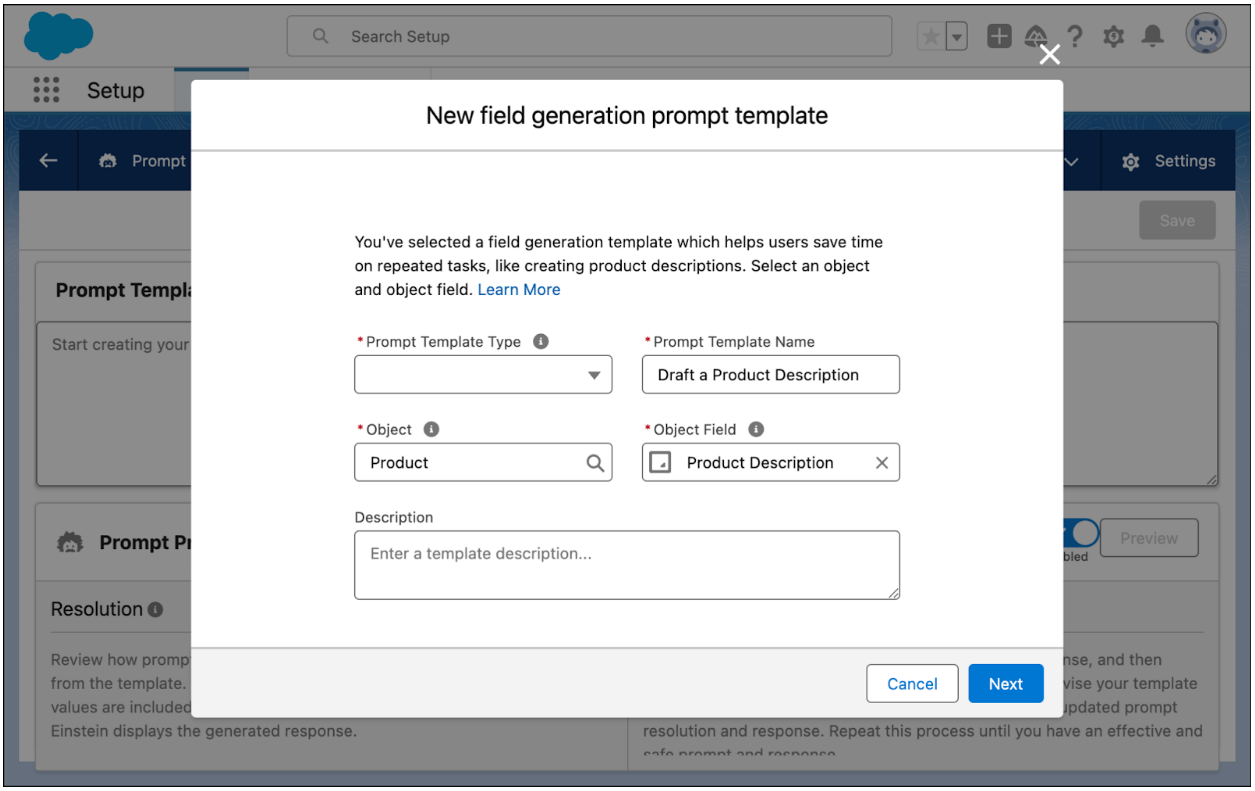
Compare the prompt resolution with the generated response, and then revise your prompt template as needed. Each time you revise your template and regenerate the prompt preview, Einstein displays an updated prompt resolution and response. Repeat this process until you have an effective and safe prompt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

Add Merge Fields to a Field Generation Prompt Template

Let's look at a field generation prompt template that uses a merge field. Say you work at a company that regularly informs customers about new products using product descriptions. Your copywriting team spends a significant amount of time writing these descriptions from scratch for every new product.

Using an LLM to write these descriptions can make this process more efficient, and the LLM can use your up-to-the-minute data to create content. To get started, create a new prompt template.

1. In the Prompt Template Type dropdown, select **Field Generation**.
2. For the Prompt Template Name, enter `Draft a Product Description`.
3. For the Object, select **Product**.
4. For the Object Field, select **Product Description**.
5. Leave the Description field blank.
6. Click **Create**, and you're redirected to the Prompt Template Workspace.



New field generation prompt template

You've selected a field generation template which helps users save time on repeated tasks, like creating product descriptions. Select an object and object field. Learn More

*Prompt Template Type:

*Prompt Template Name: Draft a Product Description

*Object: Product

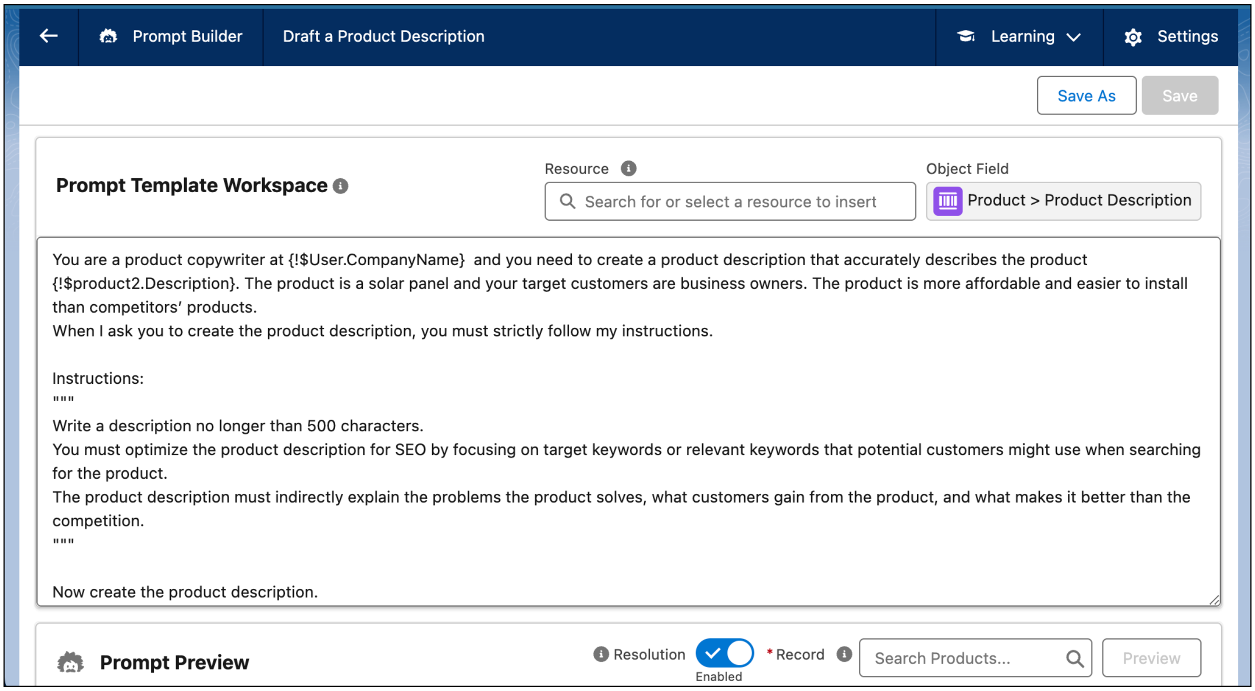
*Object Field: Product Description

Description: Enter a template description...

In the [Example Prompt Template Library](), find the field generation prompt template [Draft a product description](). Copy and paste this template into the Prompt Template Workspace.

Before you can run this template in Prompt Builder, use the Resource field to replace the placeholders with real merge fields. When the template is resolved into a prompt, the merge fields are replaced with real data.

A finished version of this template could look like this.


Prompt Builder
Draft a Product Description
Learning
Settings
Save As
Save
Prompt Template Workspace
Resource
Search for or select a resource to insert
Object Field
Product > Product Description

You are a product copywriter at {!$User.CompanyName} and you need to create a product description that accurately describes the product {!$product2.Description}. The product is a solar panel and your target customers are business owners. The product is more affordable and easier to install than competitors' products.
When I ask you to create the product description, you must strictly follow my instructions.

Instructions:
"""
Write a description no longer than 500 characters.
You must optimize the product description for SEO by focusing on target keywords or relevant keywords that potential customers might use when searching for the product.
The product description must indirectly explain the problems the product solves, what customers gain from the product, and what makes it better than the competition.
"""

Now create the product description.

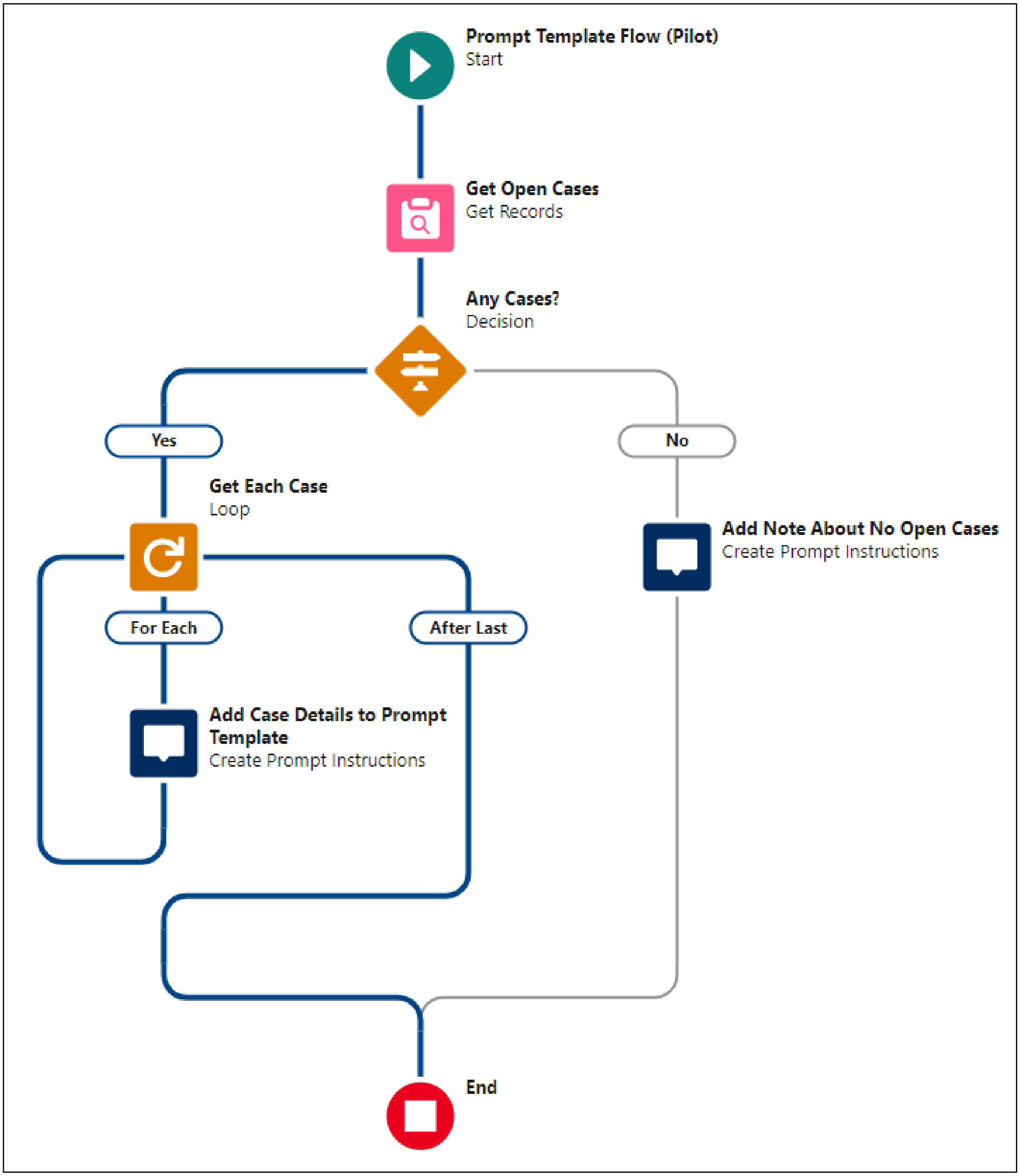
To run the prompt template and see the LLM-generated product description:

1. In the Prompt Preview section, enter a real product name in the Record search bar, and select one.
2. Click **Preview**, and review the **Response**.

Add Flows Without Data Cloud Objects to a Field Generation Prompt Template

Let's create and preview an example field generation prompt template. Say you want to provide up-to-the-minute summaries of customer cases for a given customer to your company's sales team before they make customer calls. You want to create a field generation prompt template that integrates a prompt template flow that obtains case data for an LLM to summarize.

Before creating your field generation prompt template, you create a prompt template flow that gets a list of open customer cases. For this example, you create the Get Open Cases for Account prompt template flow. In Flow Builder, the flow looks like this.


Prompt Template Flow (Pilot)
Start
Get Open Cases
Get Records
Any Cases?
Decision
Yes
No
Get Each Case
Loop
Add Note About No Open Cases
Create Prompt Instructions
For Each
After Last
Add Case Details to Prompt Template
Create Prompt Instructions
End

1. From Flow Builder, select **Prompt Template Flow (Pilot)**.
2. Click **Create**.
3. Create a flow resource that matches the object type that you plan to associate with your field generation prompt template. If the flow doesn't contain a flow resource that's the same data type as the object associated with the template, the flow isn't available to use in the template.

a. Click ◧.
b. Click **New Resource**.
c. For Resource Type, select **Variable**.
d. Enter an API name such as `Account`.
e. For Data Type, select **Record**.
f. For Object, select **Account**.
g. Select **Available for input**.
h. Click **Done**.

4. Add the Get Records element and configure it.
   a. For Label, enter `Get Open Cases`.
   b. For Object, select **Case**.
   c. For Condition Requirements, select **All Conditions Are Met (AND)**.
   d. For Field, select **AccountId**.
   e. For Operator, select **Equals**.
   f. For Value, select **Account** then **Id**.
   g. Click **Add Condition**.
   h. For Field, select **Status**.
   i. For Operator, select **Does Not Equal**.
   j. For Value, select **Closed**.
   k. For How Many Records to Store, click **All Records**.
5. Add the Decision element.
   a. For Label, enter `Any Cases?`
   b. On New Outcome, for Label, enter `Yes`.
   c. For Condition Requirements to Execute Outcome, select **All Conditions Are Met (AND)**.
   d. For Resource, select **Cases from Get_Open_Cases**.
   e. For Operator, select **Is Null**.
   f. For Value, select **$GlobalConstant.False**.
   g. Click **Default Outcome**.
   h. For Label, delete the text, and enter `No`.
6. For the No outcome path, add the Create Prompt Instructions element.
   a. For Label, enter `Add Note About No Open Cases`.
   b. For Prompt Instructions, enter `There are no open cases`.
7. For the Yes outcome path, add the Loop element.
   a. For Label, enter `Get Each Case`.
   b. For Collection Variable, select **Cases from Get_Open_Cases**.
8. On the For Each path, add the Create Prompt Instructions element.
   a. For Label, enter `Add Case Details to Prompt Template`.
   b. For Prompt Instructions, enter:

   ```
   Case details: {!Get_Each_Case.Subject},

   {!Get_Each_Case.Description}.
   ```

9. Click **Save**.
10. For Flow Label, enter `Get Open Cases for Account`.
11. Save your work, and click **Activate**.

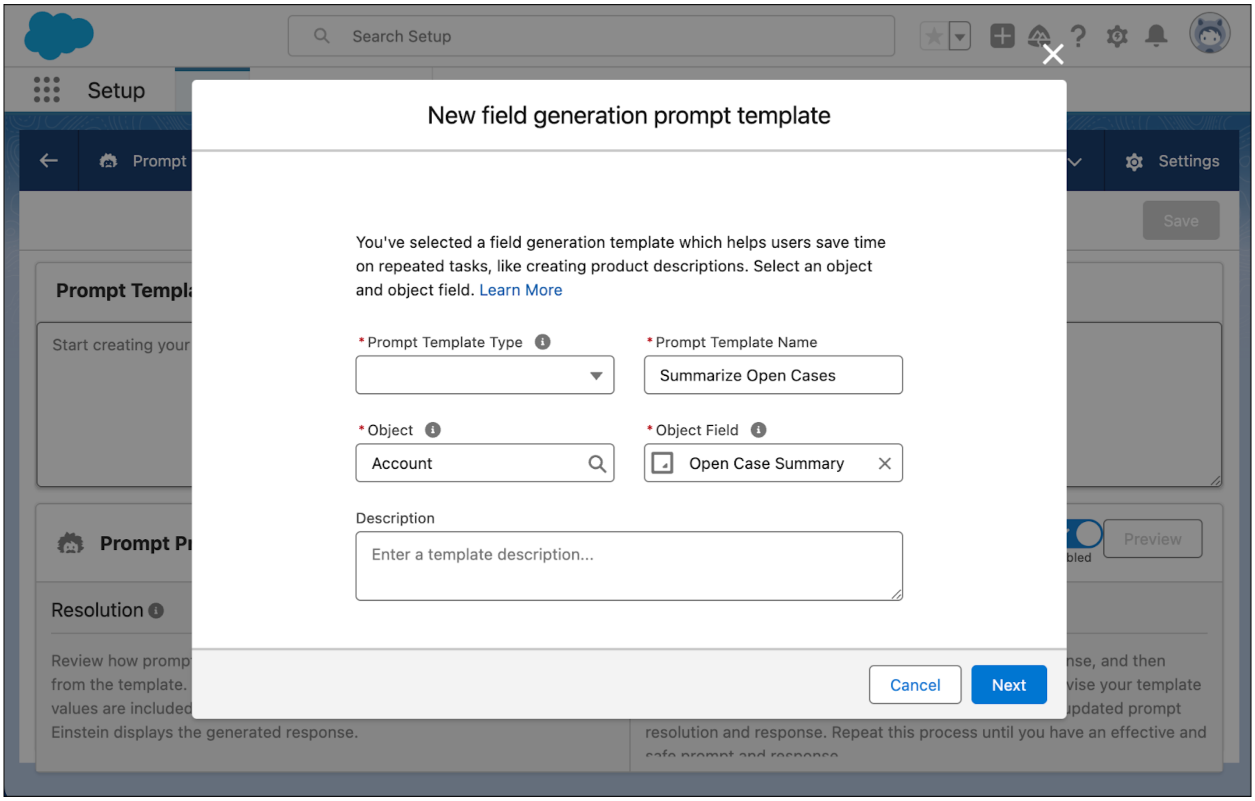
Now that the prompt template flow is ready, let's use a premade example prompt template that uses merge fields and your new flow to generate a summary of open cases for a selected account.

For the Account object, create a new custom field, Open Case Summary.

1. In Setup, open the **Object Manager**.
2. Select the **Account** label.
3. On the left side of the page, click **Fields & Relationships**.
4. Click **New** to create a new field.
    a. For Data Type, select **Text Area (Long)**, then click **Next**.
    b. For **Field Label**, enter `Open Case Summary`, then click **Next**.
    c. On the Establish field-level security page, click **Next**.
    d. Click **Save**.

In Prompt Builder, create a new prompt template.

1. For Prompt Template Type, select **Field Generation**.
2. For the Prompt Template Name, enter `Summarize Open Cases`.
3. For the Object, select **Account**. Remember that to insert a prompt template flow into a prompt template, the prompt template flow's Object must be the same data type as the prompt template's flow resource.
4. For the Object Field, select **Open Case Summary**.
5. Leave the Description field blank.
6. Click **Create**, and you're redirected to the Prompt Template Workspace.



New field generation prompt template

You've selected a field generation template which helps users save time on repeated tasks, like creating product descriptions. Select an object and object field. Learn More

*Prompt Template Type:

*Prompt Template Name: Summarize Open Cases

*Object: Account

*Object Field: Open Case Summary

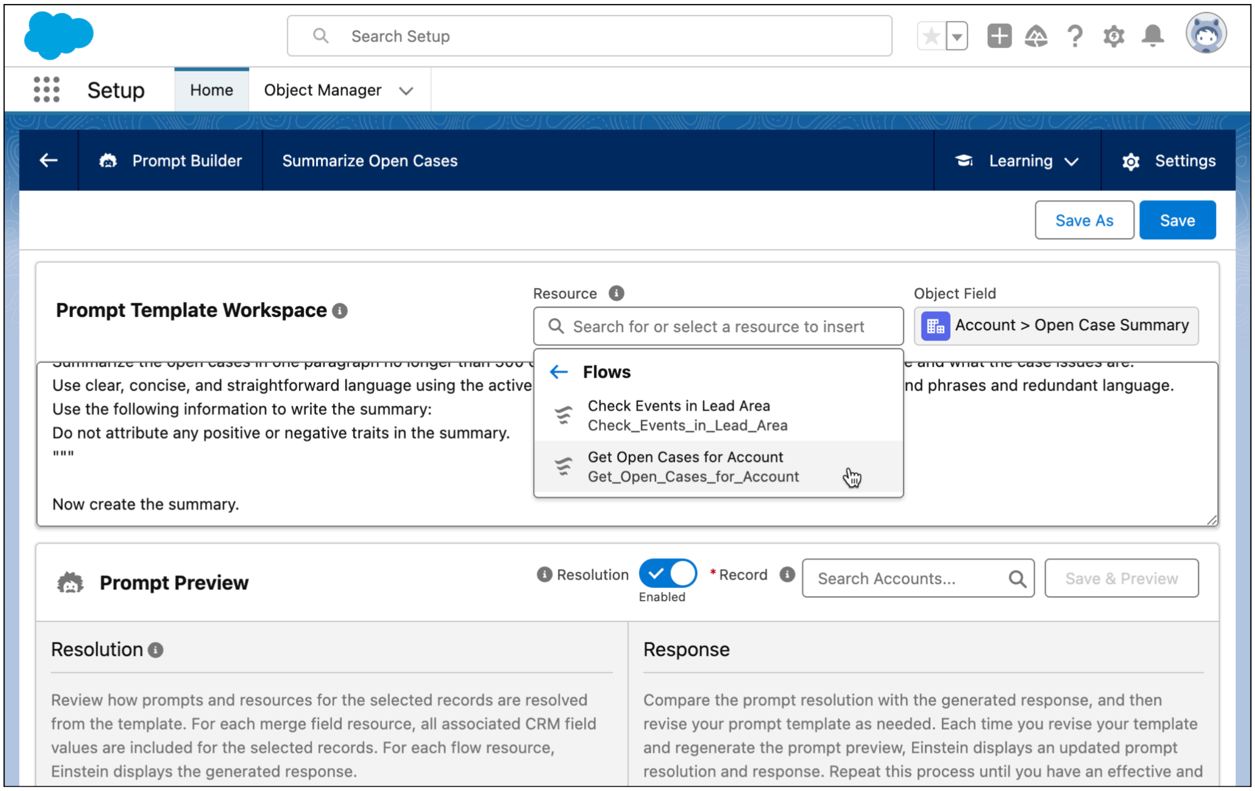
Description: Enter a template description...

In the Example Prompt Template Library, find the field generation prompt template Summarize open cases for an account. Copy and paste this template into the Prompt Template Workspace.

Before you can run this template in Prompt Builder, use the Resource field to replace the placeholders with real merge fields and a reference to a flow. When the template is resolved into a prompt, the merge fields are replaced with your real account data and a real flow is called.

After you replace the merge field placeholders with real merge fields, let's add a reference to the real Get Open Cases for **Accoun**t prompt template flow that you just created.

1. In the Prompt Template Workspace, delete the <Get_Open_Cases_For_Account__Prompt__Flow> placeholder.
2. Click the **Resource** search bar, and select **Flows**.
3. To add this flow to your template, select **Get Open Cases for Account**.



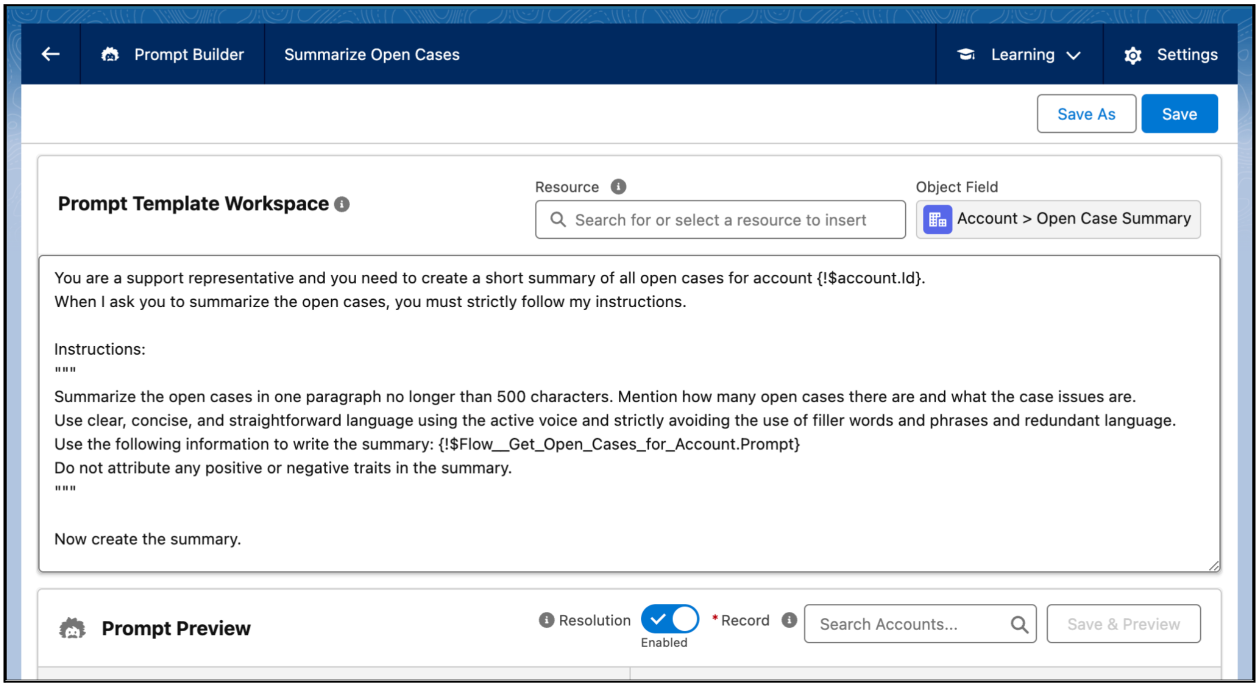
Use clear, concise, and straightforward language using the active … nd phrases and redundant language.
Use the following information to write the summary:
Do not attribute any positive or negative traits in the summary.
"""

Now create the summary.

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.

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

A finished version of this template could look like this.



Object Field: Account > Open Case Summary

```
You are a support representative and you need to create a short summary of all open cases for account {!$account.Id}.
When I ask you to summarize the open cases, you must strictly follow my instructions.

Instructions:
"""
Summarize the open cases in one paragraph no longer than 500 characters. Mention how many open cases there are and what the case issues are.
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
Use the following information to write the summary: {!$Flow__Get_Open_Cases_for_Account.Prompt}
Do not attribute any positive or negative traits in the summary.
"""

Now create the summary.
```

To run the prompt template and see the LLM-generated summary of open cases:

1. In the Prompt Preview section, enter a real account name in the Record search bar, and select it.
2. Click **Save & Preview**, and review the **Response**.

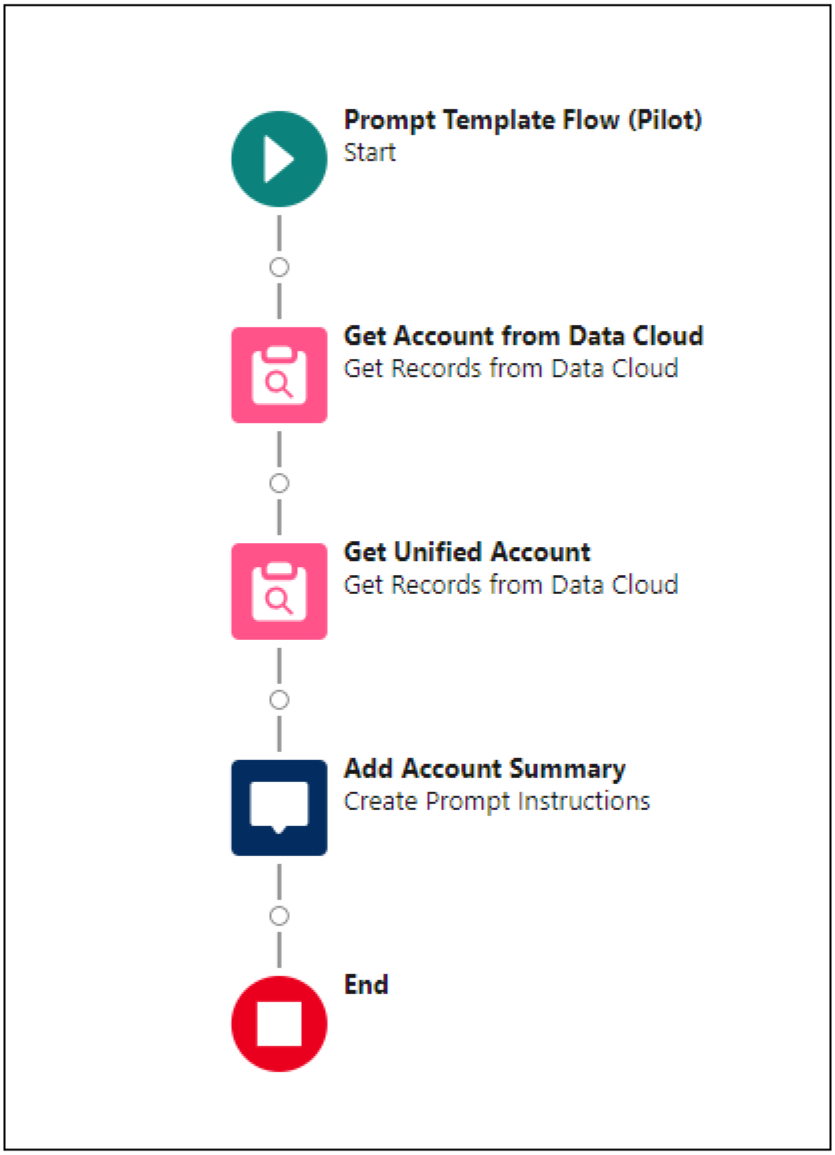
Want to create a dynamic Lightning record page that displays your open case summary for an account? See Add a Field Generation Prompt Template to a Lightning Record Page.

Add Flows with Data Cloud Objects to a Field Generation Prompt Template

Build a flow that uses unified Data Cloud object data to get a 360-degree view of an account, and then add the flow to your prompt template.

In this example, we create a flow that uses the standard Salesforce CRM Account object to look up data in the Account and Unified Account Data Cloud objects. Unified objects consolidate data from multiple data sources. To learn about data consolidation, see Unify Source Profiles. This example uses the standard data bundles for the Salesforce CRM connector. Your Data Cloud setup, objects, and fields can differ.

Before creating the field generation prompt template, create a prompt template flow that gets account data from Data Cloud. For this example, you create the Get Account Activity from Data Cloud prompt template flow. In Flow Builder, the flow looks like this.


Prompt Template Flow (Pilot)
Start
Get Account from Data Cloud
Get Records from Data Cloud
Get Unified Account
Get Records from Data Cloud
Add Account Summary
Create Prompt Instructions
End

1. From Flow Builder, select **Prompt Template Flow (Pilot)**.
2. Click **Create**.
3. Create a flow resource that matches the object type that you plan to associate with your field generation prompt template. If the flow doesn't contain a flow resource that's the same data type as the object associated with the template, the flow isn't available to use in the template.
   a. Click ◫.
   b. Click **New Resource**.
   c. For Resource Type, select **Variable**.
   d. Enter an API name, such as `Account`.
   e. For Data Type, select **Record**.
   f. For Object, select **Account**.
   g. Select **Available for input**.

        h. Click **Done**.
4. Add the Get Records element, and configure it. This Get Records element gets the Data Cloud account object that corresponds to the Salesforce CRM account object.
    a. For Label, enter `Get Account from Data Cloud`.
    b. For Data Source, select **Data Cloud Object**.
    c. For Data Space, select the data space that you want to use, for example **default**.
    d. For Object, select your account data model object (DMO), for example **Account**.
    e. For Condition Requirements, select **All Conditions Are Met (AND)**.
    f. For Field, select the field that represents the account ID, for example, **ssot_Id__c**.
    g. For Operator, select **Equals**.
    h. For Value, select **{!Account.Id}**.
    i. For How Many Records to Store, click **Only the first record**.
2. Add another Get Records element to get the unified account that's linked to your Data Cloud account object.
    a. For Label, enter `Get Unified Account`.
    b. For Data Source, select **Data Cloud Object**.
    c. For Data Space, select the same data space as before.
    d. For Object, select your unified account DMO, for example **Unified Account 0001**.
    e. For Condition Requirements, select **All Conditions Are Met (AND)**.
    f. For Field, select the field that represents the account name, for example **ssot_Name__c**.
    g. For Operator, select **Equals**.
    h. For Value, select **{!Get_Account_from_Data_Cloud.ssot__Name__c}**
    i. For How Many Records to Store, click **Only the first record**.
5. Add the Create Prompt Instructions element.
    a. For Label, enter `Add Account Summary`.
    b. For Prompt Instructions, enter:

```
Account details: Account Name is
{!Get_Unified_Account.ssot__Name__c};

Account Description is {!Get_Unified_Account.ssot__Description__c};

Account Type is {!Get_Unified_Account.ssot__AccountTypeId__c};

Account Last Activity Date is
{!Get_Unified_Account.ssot__LastActivityDate__c};

Account Last Modified Date is
{!Get_Unified_Account.ssot__LastModifiedDate__c}.
```

6. Save your work, and click **Activate**.

Now you can insert the prompt template flow into the field generation prompt template Summarize open cases for an account from the Example Prompt Template Library. For a step-by-step guide about how to add a prompt template flow to a field generation prompt template, see Add Flows Without Data Cloud Objects to a Field Generation Prompt Template.

Add Apex to a Field Generation Prompt Template

Let's create an example field generation prompt template. Say you want to provide up-to-the-minute summaries of customer cases for a given customer to your company's sales team before they make customer calls. We used the same use case in the flow section.

This time, you want to create a field generation prompt template that integrates an Apex class that obtains case data for an LLM to summarize.

Here's the Apex class that we access as a resource in a prompt template.

```
public class OpenCasesPrompt {
    @InvocableMethod(label='Open Cases' description='Find Cases for an
Account')
    public static List<Response> getCasesPrompt(List<Account> accts) {
        // Validate the expected number of contacts as an input
        Assert.areEqual(1, accts.size());
        Account a = accts[0];
        ID searchAcctId = accts[0].Id;
        List<Case> cases =
            [SELECT Id, Subject, Description
             FROM Case
             WHERE AccountId = :searchAcctId and Status != 'Closed'
             with USER_MODE];
        string responseData = null;
        if(cases.isEmpty()) {
            responseData = 'There are no open cases.';
        } else {
            for(Case c : cases) {
                responseData =
                   (responseData != null) ? responseData + '\n' : '';
                responseData += String.format('Case details: {0}, {1}.',
                    new List<Object>{c.Subject, c.Description});
            }
        }

        List<Response> responses = new List<Response>();
        Response res = new Response();
        res.Prompt = responseData;
        responses.add(res);
        return responses;
    }

    public class Response {
        @InvocableVariable(required=true)
        public String Prompt;
    }
}
```

The requirements for the Apex class are explained in Ground Prompt Templates with Salesforce Resources.

This test class isn't required, but test coverage is important. The test class simulates data sent from Prompt Builder. Two test cases are provided: one for when cases are found, and one for when there are no cases.

```
@IsTest
public class OpenCasesPrompt_Test {

    @IsTest
    public static void findMatchingCasesForAccount() {
        Account a = new Account(Name='Test Account');
        insert a;
        Case c1 = new Case(Subject='Test Case', Description='Important Case',
            Status='New', AccountId=a.id);
        Case c2 = new Case(Subject='Test Case 2',
            Description='Case Description', Status='In-progress',
            AccountId=a.id);
        Case c3 = new Case(Subject='Test Case Closed',
            Description='Closed Case', Status='Closed', AccountId=a.id);
        insert new List<Case>{c1, c2, c3};

        List<Account> accountsInput = new List<Account>{a};

        Test.startTest();
        List<OpenCasesPrompt.Response> responses =
            OpenCasesPrompt.getCasesPrompt(accountsInput);
        Test.stopTest();

        Assert.areEqual(1, responses.size());
        OpenCasesPrompt.Response response = responses[0];

        Assert.areEqual('Case details: Test Case, Important Case.\n' +
                        'Case details: Test Case 2, Case Description.',
                        response.Prompt);
    }

    @IsTest
    public static void noCasesForAccountResponse() {
        List<Account> accountsInput = new List<Account>();
        accountsInput.add(new Account());

        List<OpenCasesPrompt.Response> responses =
            OpenCasesPrompt.getCasesPrompt(accountsInput);
        Assert.areEqual(1, responses.size());
        OpenCasesPrompt.Response response = responses[0];
        Assert.areEqual('There are no open cases.', response.Prompt);
    }
}
```

Now that the Apex class is ready, let’s call it from Prompt Builder.

In Prompt Builder, create a new prompt template.

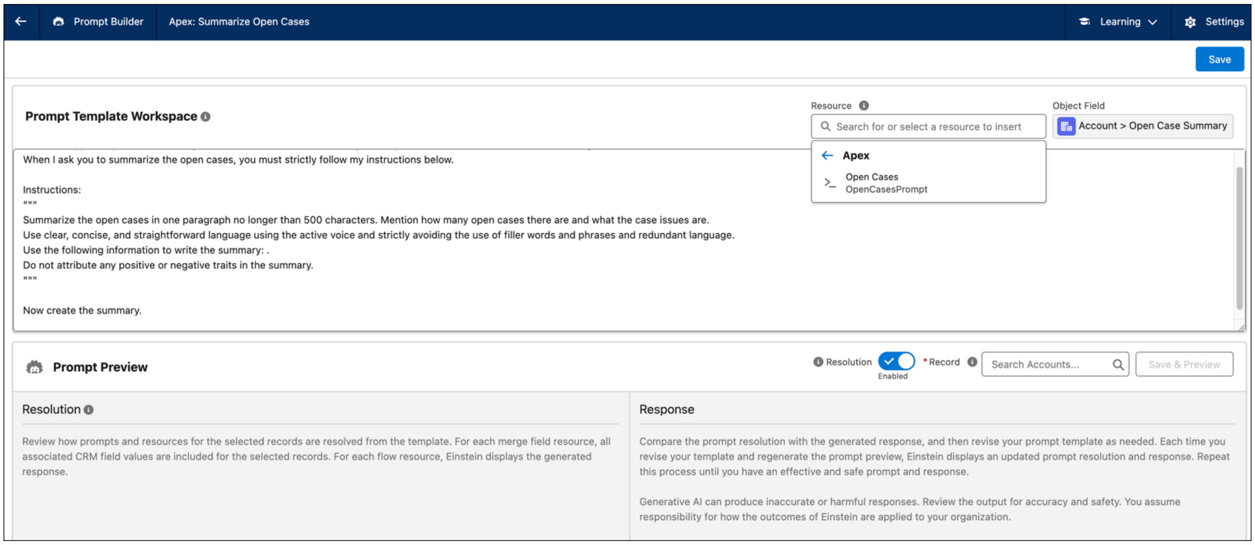
7. For Prompt Template Type, select **Field Generation**.
8. For the Prompt Template Name, enter `Apex: Summarize Open Cases`.
9. For the Object, select **Account**.
10. For the Object Field, select **Open Case Summary**.
11. Leave the Description field blank.
12. Click **Create**, and you’re redirected to the Prompt Template Workspace.

In the Example Prompt Template Library, find the field generation prompt template Summarize open cases for an account. Copy and paste this template into the Prompt Template Workspace.

Before you can run this template in Prompt Builder, use the **Resource** field to replace the placeholders with real merge fields and a reference to Apex. When the template is resolved into a prompt, the merge fields are replaced with your real account data and your Apex class is called.

After you replace the merge field placeholders with real merge fields, let’s add a reference to the real **OpenCasesPrompt** Apex class that you just created.

4. In the Prompt Template Workspace, delete the <Get_Open_Cases_For_Account__Prompt__Flow> placeholder.
5. Click the **Resource** search bar, and select **Apex**.
6. To add the `OpenCasesPrompt` Apex class to your template, select **Open Cases**. Open Cases is the label attribute that you set in the `@InvocableMethod` annotation in the `OpenCasesPrompt` Apex class.



```
When I ask you to summarize the open cases, you must strictly follow my instructions below.

Instructions:
"""
Summarize the open cases in one paragraph no longer than 500 characters. Mention how many open cases there are and what the case issues are.
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
Use the following information to write the summary: .
Do not attribute any positive or negative traits in the summary.
"""

Now create the summary.
```

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.

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.

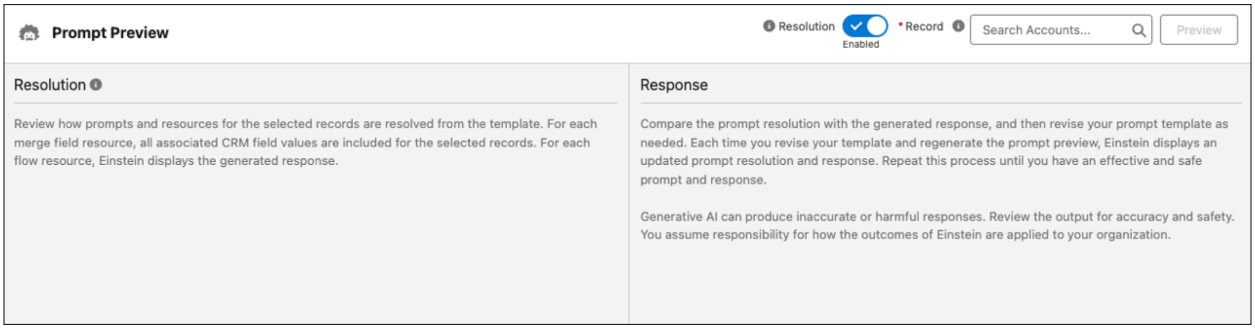
The Apex class is inserted into the prompt template as `{!$Apex__OpenCasesPrompt.Prompt}`.

Review, Revise, and Repeat: Ensure That the Prompt Template Is Effective

Generative AI uses LLMs to generate output. Because LLMs are trained by other organizations, it's common to first receive an LLM response that isn't quite right, even if the prompt seems clear. If the output doesn't meet your expectations, you can generate a new output by starting over. The generated output from the previous attempt isn't saved, and the new output replaces it. With Prompt Builder, it's easy to edit your prompt template until you're completely satisfied with a response.

Preview a Generated Response

In the Prompt Preview section of your workspace, you can review a response that's grounded with real Salesforce record data.



Resolution

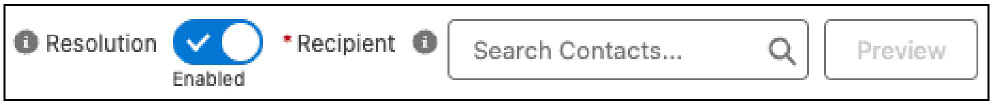
Review how prompts and resources for the selected records are resolved from the template. For each merge field resource, all associated CRM field values are included for the selected records. For each flow resource, Einstein displays the generated response.

Response

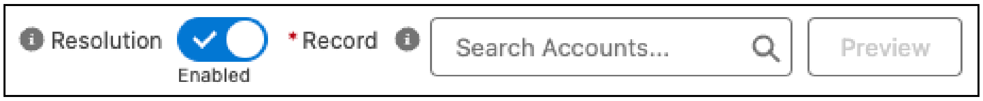
Compare the prompt resolution with the generated response, and then revise your prompt template as needed. Each time you revise your template and regenerate the prompt preview, Einstein displays an updated prompt resolution and response. Repeat this process until you have an effective and safe prompt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

1. To preview a sales email response, search for a Recipient and select one. The Recipient's object type corresponds to the Recipient type that you selected when you created the sales email prompt template. To see a list of objects that you can set as the Recipient, start typing an object name in the Recipient search bar.

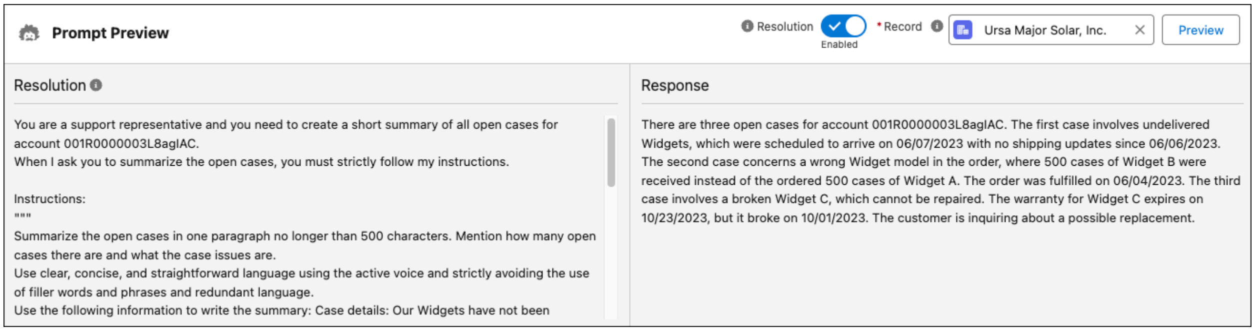
   

   To preview a field generation response, select a Record. The Record's object type corresponds to the object type that you selected when you created the field generation prompt template. To see a list of objects that you can set as the Record, start typing an object name in the Record search bar.

2. To generate the resolved prompt and the response, click **Preview**.

Each time you click **Preview**, the LLM generates a new response, even if you haven't changed your prompt template. To ensure that your prompt template yields consistent results, generate multiple responses per record, and then compare the responses.



Resolution

You are a support representative and you need to create a short summary of all open cases for account 001R0000003L8agIAC.
When I ask you to summarize the open cases, you must strictly follow my instructions.

Instructions:
"""
Summarize the open cases in one paragraph no longer than 500 characters. Mention how many open cases there are and what the case issues are.
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
Use the following information to write the summary: Case details: Our Widgets have not been

Response

There are three open cases for account 001R0000003L8agIAC. The first case involves undelivered Widgets, which were scheduled to arrive on 06/07/2023 with no shipping updates since 06/06/2023. The second case concerns a wrong Widget model in the order, where 500 cases of Widget B were received instead of the ordered 500 cases of Widget A. The order was fulfilled on 06/04/2023. The third case involves a broken Widget C, which cannot be repaired. The warranty for Widget C expires on 10/23/2023, but it broke on 10/01/2023. The customer is inquiring about a possible replacement.

Evaluate the Quality of a Response

When you preview a generated response, evaluate how well the response meets the goals of the prompt. Make sure that the response is factually accurate and doesn't contain harmful content or bias.

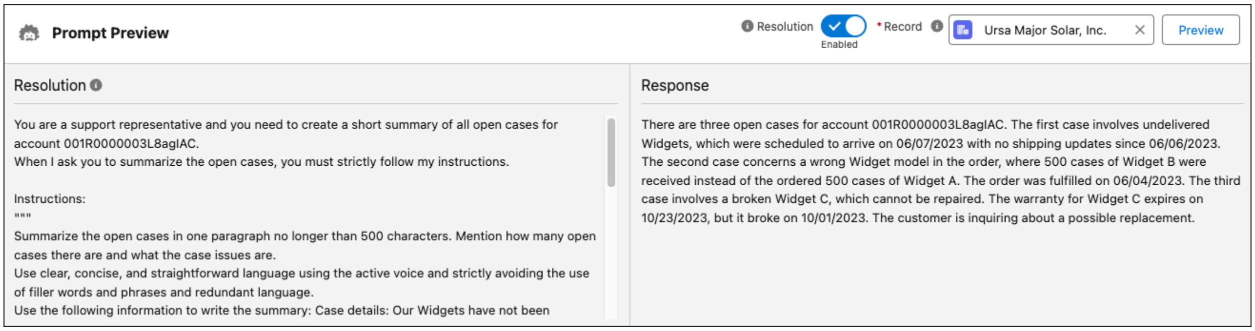
To assess a response's effectiveness, it's helpful to ask yourself questions about these topics.

- **Relevance:** Is the response relevant in context? Does the response fit in with the conversation or content that surrounds it?
- **Goal Completion:** Does the response fulfill the goals of the prompt? Does it address everything that the prompt requests?
- **Style and Tone:** Is the style, voice, and tone of the response appropriate? Is the response's vocabulary and punctuation correct?
- **Factual Accuracy:** Does the response correctly incorporate the grounded data? Is information in the response complete and accurate? Does the response contain redundant, excess, or erroneous information?
- **Consistency:** How varied is the response? When you regenerate the response without changing the prompt template, how does the response change? How does the response change when you ground the prompt with different data?
- **Toxicity:** Is the response safe? Does it avoid potentially harmful content, such as offensive, disrespectful, or abusive language? LLMs are trained on huge amounts of data, which puts the model at risk for producing toxic verbiage that leaks into your responses.
- **Bias:** Does the response reflect fairness and inclusivity? Does it assume the gender identity of a person based on their name alone, sideline participants with disabilities, or displace assumptions about race or socioeconomic status? LLMs are trained on huge amounts of data, which puts the model at risk for producing biased verbiage that leaks into your responses.

Enable Resolution to Review a Prompt Template

When you enable **Resolution**, you can review the completed prompt that's generated from your prompt template. Through a process called prompt resolution, the LLM fills each placeholder in the prompt template with real CRM data related to the records that you selected.

Resolution is enabled by default. Use the resolved prompt and the generated response to guide your prompt template revisions.



Resolution

You are a support representative and you need to create a short summary of all open cases for account 001R0000003L8agIAC.
When I ask you to summarize the open cases, you must strictly follow my instructions.

Instructions:
"""
Summarize the open cases in one paragraph no longer than 500 characters. Mention how many open cases there are and what the case issues are.
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
Use the following information to write the summary: Case details: Our Widgets have not been

Response

There are three open cases for account 001R0000003L8agIAC. The first case involves undelivered Widgets, which were scheduled to arrive on 06/07/2023 with no shipping updates since 06/06/2023. The second case concerns a wrong Widget model in the order, where 500 cases of Widget B were received instead of the ordered 500 cases of Widget A. The order was fulfilled on 06/04/2023. The third case involves a broken Widget C, which cannot be repaired. The warranty for Widget C expires on 10/23/2023, but it broke on 10/01/2023. The customer is inquiring about a possible replacement.

For each merge field, the field value of the selected record is inserted into the prompt.

Example Merge Field	Example Resolved Merge Field
{!$account.Id}	001R0000003L8agIAC

For each flow resource, the generated response text is inserted into the prompt.

Example Flow	Example Resolved Flow
{!$Flow__Get_Open_Cases_for_Account.Prompt}	Case details: Our Widgets have not been delivered. Widgets were scheduled to have arrived 06/07/2023. No shipping updates since 06/06/2023. Case details: Wrong Widget model in order. Order was 500 cases of Widget A. Received 500 cases of Widget B. Order was fulfilled on 06/04/2023. Case details: Widgets broken before warranty expiration date. Widget C has broken and cannot be repaired. The warranty expires on 10/23/2023, but Widget C broke on 10/01/2023. Can a replacement be provided?.

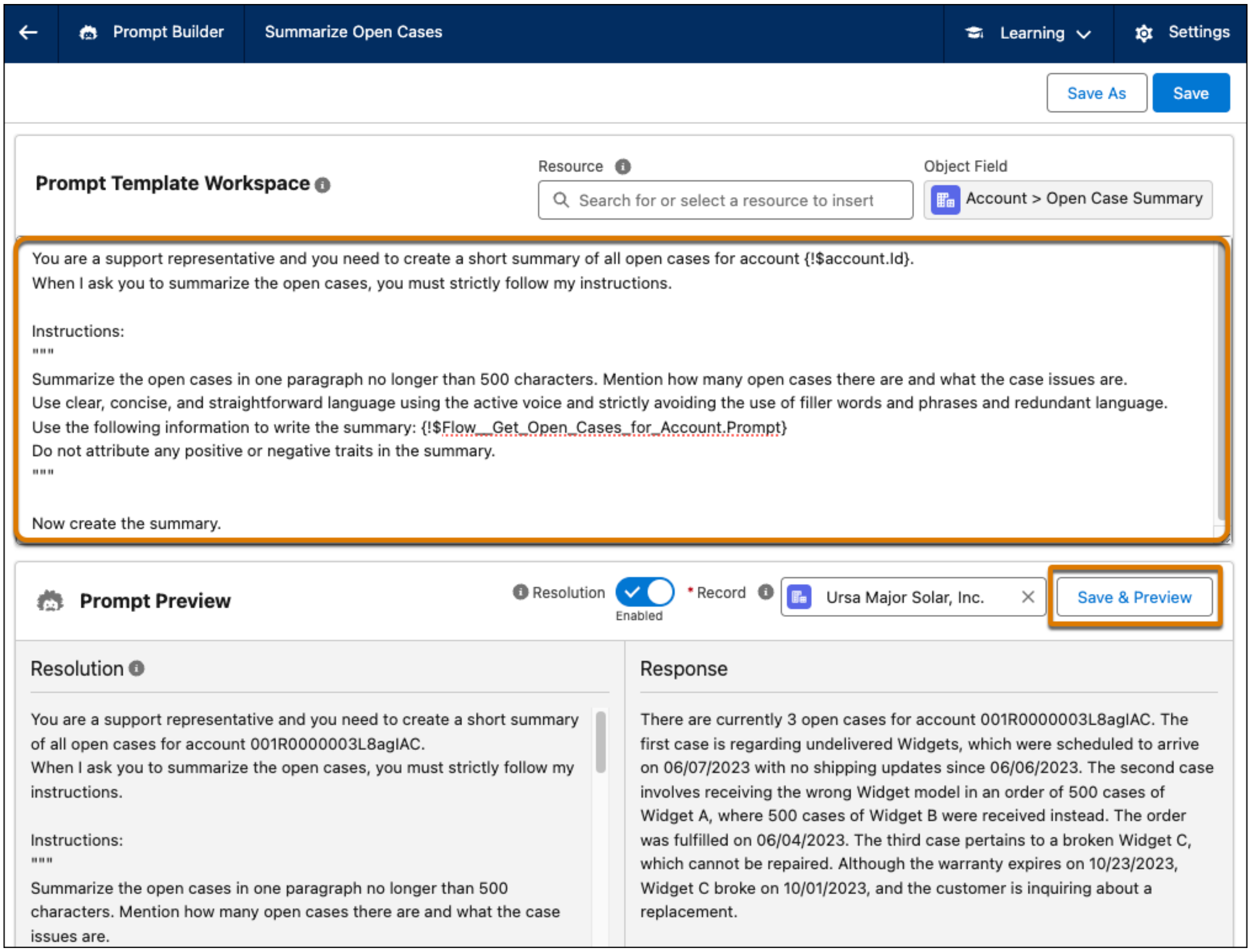
For each Apex class, the generated response string is inserted into the prompt.

Example Apex	Example Resolved Apex
{!$Apex__OpenCasesPrompt.Prompt}	Case details: Our Widgets have not been delivered. Widgets were scheduled to have arrived 06/07/2023. No shipping updates since 06/06/2023. Case details: Wrong Widget model in order. Order was 500 cases of Widget A. Received 500 cases of Widget B. Order was fulfilled on 06/04/2023. Case details: Widgets broken before warranty expiration date. Widget C has broken and cannot be repaired. The warranty expires on 10/23/2023, but Widget C broke on 10/01/2023. Can a replacement be provided?.

Revise a Prompt Template

Perfecting a prompt template is an iterative process: You revise the prompt template, regenerate a resolved prompt and response, and then make further revisions based on that updated response. Every time you run a prompt template in Prompt Builder, you create a unique call to the LLM. That means that resolving the same prompt can produce different responses. Remember to review every response for accuracy, even if you’ve run the template before.

To revise a prompt template, edit your prompt template text directly in the Prompt Template Workspace. Then regenerate the response by clicking **Save & Preview**.



You are a support representative and you need to create a short summary of all open cases for account {!$account.Id}.
When I ask you to summarize the open cases, you must strictly follow my instructions.

Instructions:
"""
Summarize the open cases in one paragraph no longer than 500 characters. Mention how many open cases there are and what the case issues are.
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
Use the following information to write the summary: {!$Flow__Get_Open_Cases_for_Account.Prompt}
Do not attribute any positive or negative traits in the summary.
"""

Now create the summary.

Resolution

You are a support representative and you need to create a short summary of all open cases for account 001R0000003L8agIAC.
When I ask you to summarize the open cases, you must strictly follow my instructions.

Instructions:
"""
Summarize the open cases in one paragraph no longer than 500 characters. Mention how many open cases there are and what the case issues are.

Response

There are currently 3 open cases for account 001R0000003L8agIAC. The first case is regarding undelivered Widgets, which were scheduled to arrive on 06/07/2023 with no shipping updates since 06/06/2023. The second case involves receiving the wrong Widget model in an order of 500 cases of Widget A, where 500 cases of Widget B were received instead. The order was fulfilled on 06/04/2023. The third case pertains to a broken Widget C, which cannot be repaired. Although the warranty expires on 10/23/2023, Widget C broke on 10/01/2023, and the customer is inquiring about a replacement.

When you edit a prompt template, we recommend that you:

- Experiment with different selected records to ensure that the LLM produces consistent responses.
- Save your template early and often. You can also create a copy of your prompt template by clicking **Save As**.
- Study the language of the templates in the Example Prompt Template Library, especially the text related to writing style. You can use similar phrasing in your own templates.

For more information about creating effective prompt templates, see Best Practices for Building Prompt Templates.

Example Prompt Template Library

Use Example Prompt Templates

To get started with Prompt Builder, customize one of the example prompt templates.

1. Choose an example prompt template that's similar to your use case. Then create a template that has the same field values as the example. For guidance on creating templates, see Create a Sales Email Prompt Template or Create a Field Generation Prompt Template.
2. Copy and paste the example template in the Prompt Template Workspace.
3. Customize the template and replace the placeholder resource text with real merge field and flow resources. You can learn how to build prompt flows in Add Flows Without Data Cloud Objects to a Sales Email Prompt Template and Add Flows Without Data Cloud Objects to a Field Generation Prompt Template.
4. Save the template, and preview the model's response.

Review and revise your prompt templates until the LLM produces the responses you want. For tips on how to revise prompts, see Review, Revise, and Repeat: Ensure the Prompt Template is Effective.

Sales Email Example Templates

Warning: The example templates contain placeholder text for prompt template resources. Before previewing the model's response to an example template, replace each placeholder with a merge field or prompt flow.

Draft an introduction email for a new lead or contact

Prompt Template Type: Email
Recipient Type: Lead or Contact

This prompt template contains placeholder text for these merge fields.

- <sender.Name__Merge_Field>
- <sender.Company__Merge_Field>
- <recipient.Name__Merge_Field>
- <recipient.Company__Merge_Field>

```
You're an Account Executive and your name is <sender.Name__Merge_Field> from an organization called <sender.Company__Merge_Field> and you sell commercial solar panels. Your prospect is <recipient.Name__Merge_Field> from the company <recipient.Company__Merge_Field>.
You want to tell your prospect how <sender.Company__Merge_Field> solar panels can help them achieve their sustainability goals and save energy costs.
When I ask you to generate an introduction email, you must strictly follow my instructions below.

Instructions:
"""
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
Generate a subject line that can increase open rate using words and content that is related to the email body content.
Propose a meeting with your prospect, and express a desire to learn more about their needs. Indirectly encourage the prospect to respond to your email by showing that
```

```
you're willing to answer any questions they may have.
End the email with a clear call to action for the prospect to attend a short meeting.
"""

Now generate the introduction email to your prospect.
```

Draft an Email for a Contact About Regional Marketing Events

Prompt Template Type: Email
Recipient Type: Contact

This prompt template contains placeholder text for merge fields and a prompt flow.

- <sender.Name__Merge_Field>
- <recipient.Name__Merge_Field>
- <recipient.Company__Merge_Field>
- <Get_Events_Near_Contact__Prompt_Flow>. See Add Flows Without Data Cloud Objects to a Sales Email Prompt Template.

```
You're an Account Executive and your name is <sender.Name__Merge_Field> from Ursa Major Solar. Your prospect is <recipient.Name__Merge_Field> from <recipient.Company__Merge_Field>.
You're following up with your contact to invite them to an event near them where they can learn more about the products they are considering purchasing.
When I ask you to generate an email, you must strictly follow my instructions below.

Instructions:
"""
Generate a subject line that can increase open rate using words and content that is related to the email body content. It must be no longer than 60 characters.
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
Indirectly encourage the contact to respond to your email by showing that you're willing to answer any questions they have.
Add the following event information to the email: <Get_Events_Near_Contact__Prompt_Flow>.
End the email with a clear call to action to attend the event.
"""

Now generate the email to your contact.
```

Draft a follow-up email that contains an event survey

Prompt Template Type: Email
Recipient Type: Lead

This prompt template contains placeholder text for merge fields and a prompt flow.

- <sender.Name__Merge_Field>
- <sender.Company__Merge_Field>
- <recipient.Name__Merge_Field>
- <recipient.Company__Merge_Field>

- <Get_Event_And_Survey_For_Lead__Prompt_Flow>

```
You're an Account Executive and your name is <sender.Name__Merge_Field> from <sender.Company__Merge_Field>. Your lead is <recipient.Name__Merge_Field> from <recipient.Company__Merge_Field>.
You're following up with your lead after they attended an event and are asking them to complete a survey about their experience at the event.
When I ask you to write a follow up email to your lead, you must strictly follow my instructions below.

Instructions:
"""
Generate a subject line that can increase open rate using words and content that is related to the email body content. It must be no longer than 60 characters.
Use clear, concise, and straightforward language using the active voice and strictly avoiding the use of filler words and phrases and redundant language.
The body of the email should thank them for attending the event and ask them to complete a survey.
Add the following event information and survey to the email: <Get_Event_And_Survey_For_Lead__Prompt_Flow>.
End the email with a call to action to complete the survey.
"""

Now generate the follow up email to your lead.
```

Field Generation Example Templates

Warning: The example templates contain placeholder text for prompt template resources. Before previewing the model's response to an example template, replace each placeholder with a merge field or prompt flow.

Draft a product description

Prompt Template Type: Field Generation
Object: Product
Object Field: Description

This prompt template contains placeholder text for a merge field.

- <User.CompanyName__Merge_Field>
- <product.Name__Merge_Field>

```
You're a product copywriter at <User.CompanyName__Merge_Field> and you need to create a product description that accurately describes the product <product.Name__Merge_Field>. The product is a solar panel and your target customers are business owners. The product is more affordable and easier to install than competitors' products.
When I ask you to create the product description, you must strictly follow my instructions below.

Instructions:
```

```
"""
Write a description no longer than 500 characters.
You must optimize the product description for SEO by focusing on target keywords or
relevant keywords that potential customers might use when searching for the product.
The product description must indirectly explain the problems the product solves, what
customers gain from the product, and what makes it better than the competition.
"""

Now create the product description.
```

Summarize open cases for an account

Prompt Template Type: Field Generation
Object: Account
Object Field: Open Case Summary (Custom Field)

This prompt template contains placeholder text for merge fields and a prompt flow.

- <account.Id__Merge_Field>
- <Get_Open_Cases_for_Account__Prompt_Flow>. See Add Flows Without Data Cloud Objects to a Field Generation Prompt Template.

```
You're a support representative, and you need to create a short summary of all open cases for
account <account.Id__Merge_Field>.
When I ask you to summarize the open cases, you must strictly follow my instructions below.

Instructions:
"""
Summarize the open cases in one paragraph no longer than 500 characters. Mention how
many open cases there are and what the case issues are.
Use clear, concise, and straightforward language using the active voice and strictly avoiding
the use of filler words and phrases and redundant language.
Use the following information to write the summary:
<Get_Open_Cases_for_Account__Prompt_Flow>.
Do not attribute any positive or negative traits in the summary.
"""

Now create the summary.
```

Summarize account activity

Prompt Template Type: Field Generation
Object: Account
Object Field: Description

This prompt template contains placeholder text, a merge field, and a prompt flow connected to Data Cloud.

- <account.Name__Merge_Field>
- <Get_History_For_Account__Prompt_Flow>.

```
You’re a sales representative who needs to create a short summary of the account
history for <account.Name__Merge_Field>.
When I ask you to summarize the account history, you must strictly follow my
instructions below.

Instructions:
"""
Summarize the account activity history in one paragraph no longer than 1000
characters.
Use clear, concise, and straightforward language using the active voice and strictly
avoiding the use of filler words and phrases and redundant language.
Use the following information to write the summary:
<Get_History_For_Account__Prompt_Flow>.
Do not attribute any positive or negative traits in the summary.
"""

Now create the summary.
```

Give Users Access to a Prompt Template

Prepare your users to harness the power of Einstein generative AI. Manage who can use prompt templates with permission sets. Add sales email prompt templates to Einstein for Sales, and add field generation prompt templates to dynamic fields in pages built with Lightning App Builder.

Add a Sales Email Prompt Template to Einstein Sales Emails

Get ready to add sales email prompt templates from Prompt Builder to your sales team’s toolbox. Turn on Sales Emails in Setup, and then assign a permission set to your sales reps.

For information about assigning Einstein for Sales permission sets, see Set Up Sales Emails.

Add a Field Generation Prompt Template to a Lightning Record Page

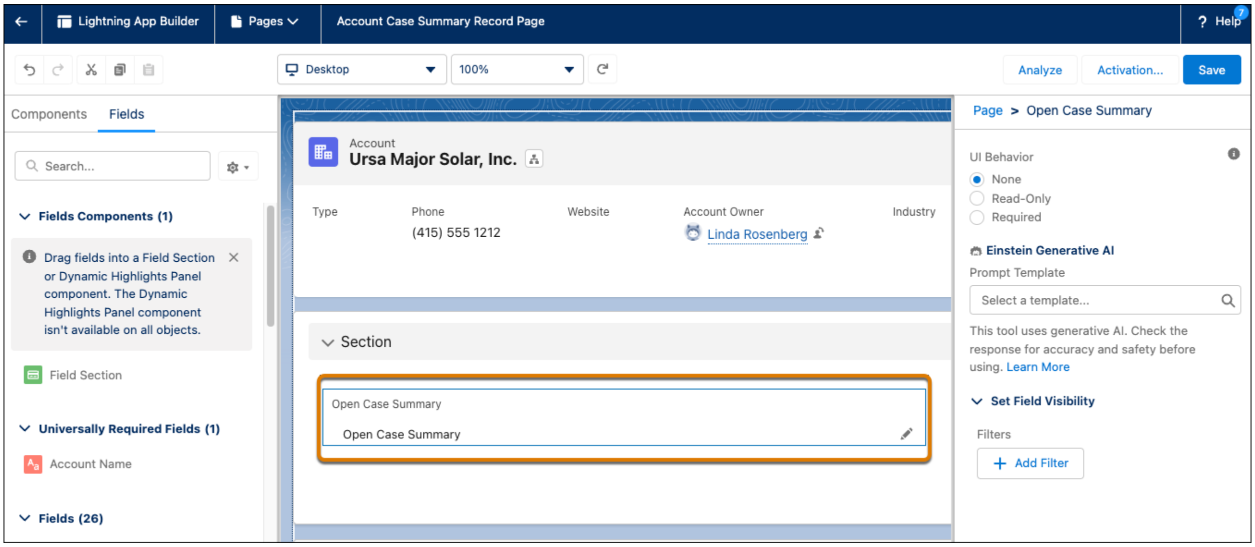
Generative AI-enabled fields powered by prompt templates can help users complete their workflows faster. With a click of a button, your users can generate a complete record field grounded with real-time data from across your org without considering the underlying prompt template and the resolved prompt.

Note: For users to access generative AI-enabled fields in the Salesforce mobile app, you must first enable Dynamic Forms on Mobile.

1. From Setup, open Lightning App Builder.
2. Select an existing Lightning record page, or create a new one.
3. Drag a Field Section component or a Record Detail component onto the selected page.

- For a Field Section component: Drag a form field onto the Field Section component.
- For a Record Detail component: Migrate to Dynamic Forms so that you can configure fields from your existing record pages as individual components. See Break Up Your Record Details with Dynamic Forms.

4. Click a form field that supports field generation. You can add a field generation prompt to writable text, text area, text area (long), and text area (rich) field types. You can't add a field generation prompt to read-only fields.



Drag fields into a Field Section or Dynamic Highlights Panel component. The Dynamic Highlights Panel component isn't available on all objects.

Account
Ursa Major Solar, Inc.

Type
Phone (415) 555 1212
Website
Account Owner Linda Rosenberg
Industry

Open Case Summary
Open Case Summary

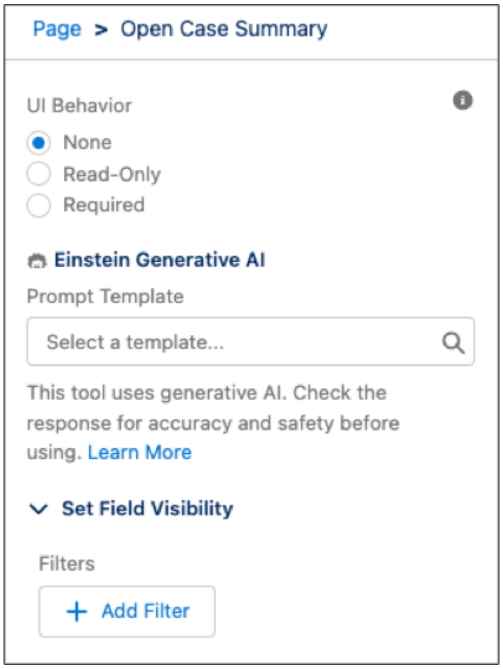
UI Behavior
● None
○ Read-Only
○ Required

Prompt Template
Select a template...

This tool uses generative AI. Check the response for accuracy and safety before using. Learn More

Filters

5. In the Einstein Generative AI section of the field properties panel, select a field generation prompt template to assign to the form field.



UI Behavior
● None
○ Read-Only
○ Required

Prompt Template
Select a template...

This tool uses generative AI. Check the response for accuracy and safety before using. Learn More

Filters

6. Save and activate the Lightning record page.

How Users Work with a Prompt Template

Up until this point, we've been talking about how you, as a Salesforce administrator, configure prompt templates to make tasks easier for your users. This section explains how your users can apply these prompt templates to write emails, generate case summaries, complete text form fields, and more.

Sales Email Prompt Templates in Action

Einstein generative AI helps you draft a personalized email. Your org's custom sales email prompt templates automatically appear as options in the Lightning Experience email composer. Before you send an Einstein Sales Email, review the email draft and edit it, if needed.

To learn about drafting sales emails with Einstein, see Draft a Sales Email with Einstein Generative AI.

Important: This tool uses generative AI, which is known to include inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for the output when shared.

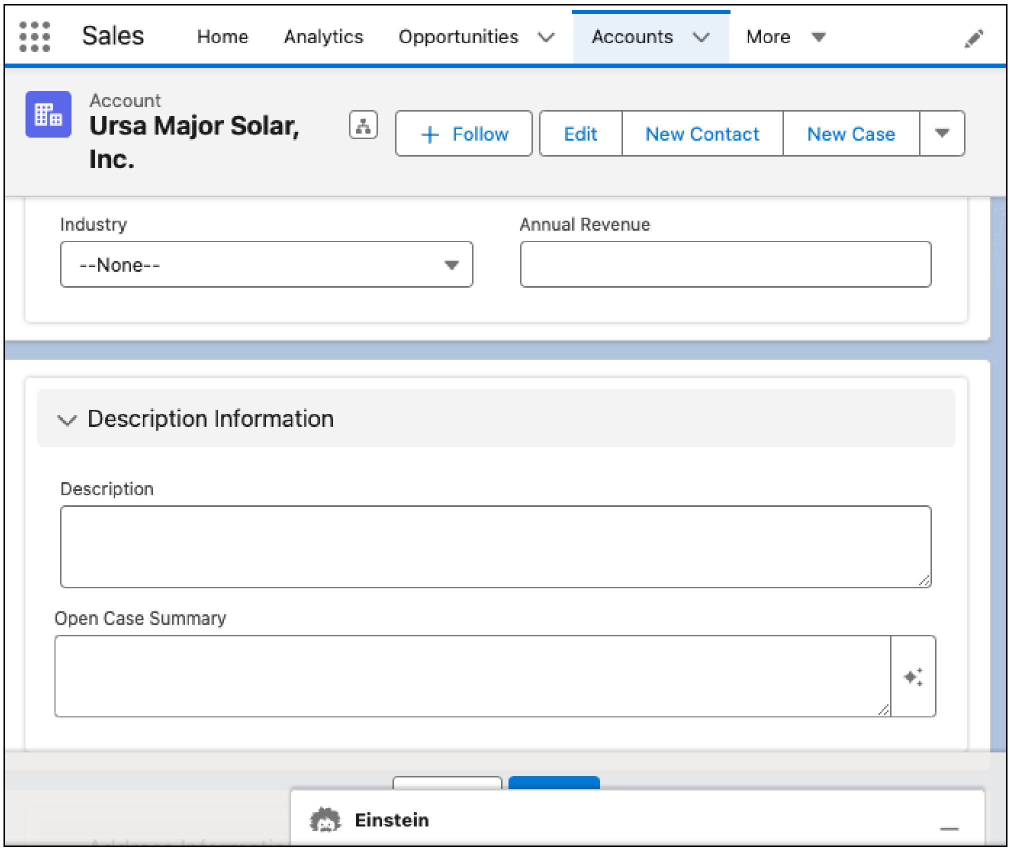
Note: Einstein Sales Emails isn't available in the Salesforce mobile app.

Field Generation Prompt Templates in Action

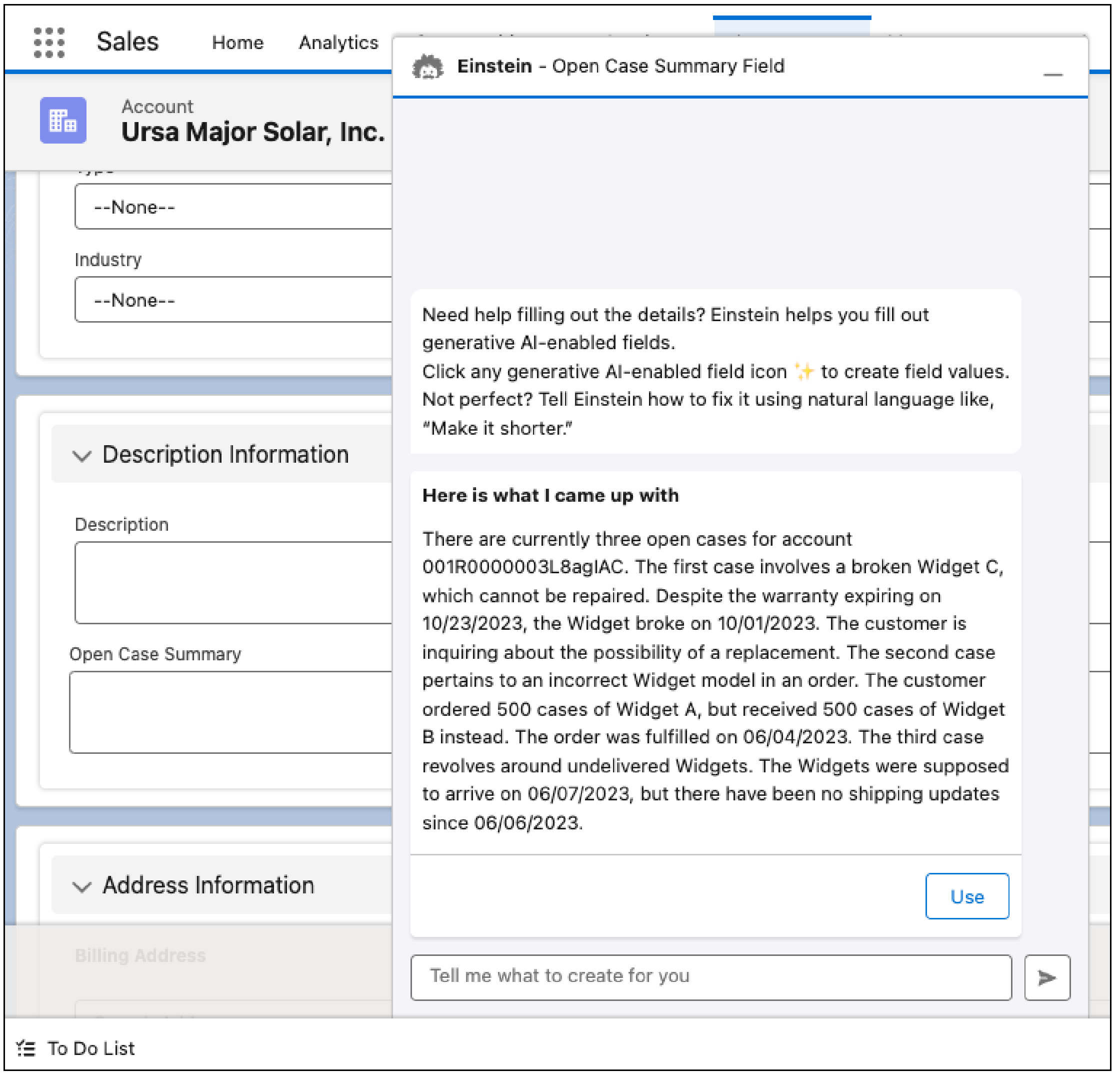
With generative AI-enabled fields, you can get real-time data from across your org without leaving a Lightning page. Generative AI-enabled fields use field generation prompt templates to provide dynamic summaries, descriptions, and more.

Note: For users to access generative AI-enabled fields in the Salesforce mobile app, a Salesforce admin must first enable Dynamic Forms on Mobile.

1. Click ✏ on a Lightning record page form field.
2. If the form field is enabled for generative AI, ✨ appears on the field. To generate a draft of the field, click ✨.



3. In the Einstein panel, review the draft that the AI generates.



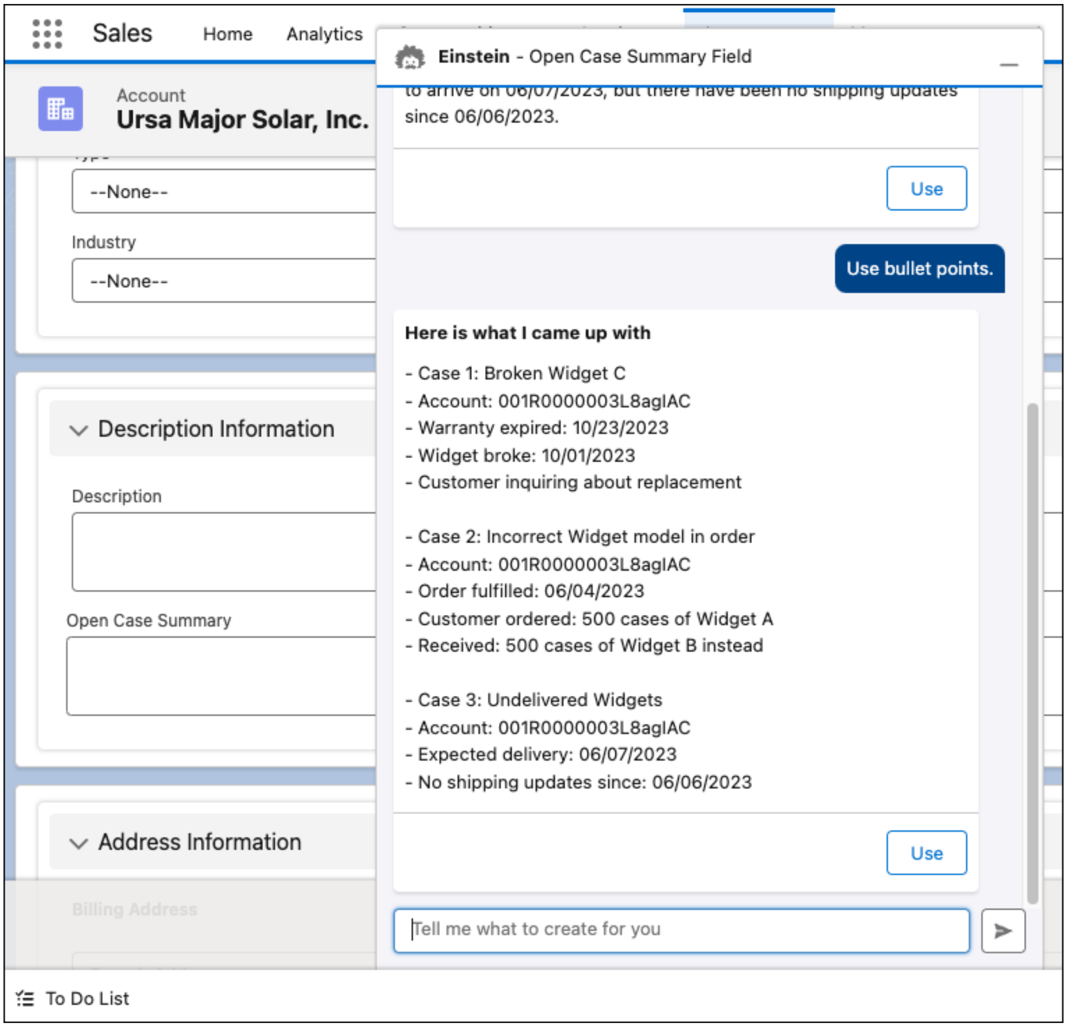
Need help filling out the details? Einstein helps you fill out generative AI-enabled fields.
Click any generative AI-enabled field icon ✨ to create field values.
Not perfect? Tell Einstein how to fix it using natural language like, "Make it shorter."

Here is what I came up with

There are currently three open cases for account 001R0000003L8agIAC. The first case involves a broken Widget C, which cannot be repaired. Despite the warranty expiring on 10/23/2023, the Widget broke on 10/01/2023. The customer is inquiring about the possibility of a replacement. The second case pertains to an incorrect Widget model in an order. The customer ordered 500 cases of Widget A, but received 500 cases of Widget B instead. The order was fulfilled on 06/04/2023. The third case revolves around undelivered Widgets. The Widgets were supposed to arrive on 06/07/2023, but there have been no shipping updates since 06/06/2023.

4. To add the draft to the field, click **Use**.

   If you're unsatisfied with the response, send a message that asks Einstein to rewrite the draft. For example, you can ask Einstein to shorten a field description. Einstein supports brief back-and-forth conversations, so if you're still unsatisfied with the regenerated draft, just ask Einstein to revise the draft again.



to arrive on 06/07/2023, but there have been no shipping updates since 06/06/2023.

Use bullet points.

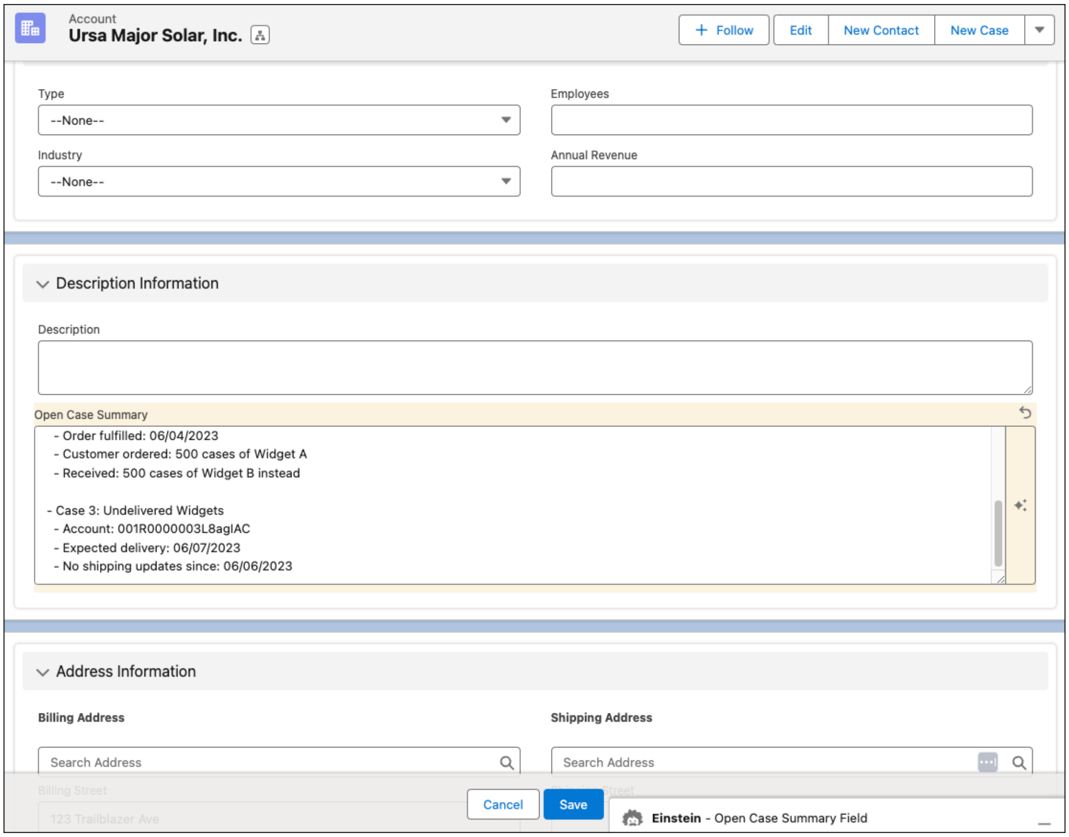
Here is what I came up with

- Case 1: Broken Widget C
- Account: 001R0000003L8agIAC
- Warranty expired: 10/23/2023
- Widget broke: 10/01/2023
- Customer inquiring about replacement

- Case 2: Incorrect Widget model in order
- Account: 001R0000003L8agIAC
- Order fulfilled: 06/04/2023
- Customer ordered: 500 cases of Widget A
- Received: 500 cases of Widget B instead

- Case 3: Undelivered Widgets
- Account: 001R0000003L8agIAC
- Expected delivery: 06/07/2023
- No shipping updates since: 06/06/2023

5. After you add the draft to the field, review the field again. Edit the field, if desired.



Type: --None--

Employees:

Industry: --None--

Annual Revenue:

Description:

Open Case Summary

- Order fulfilled: 06/04/2023
- Customer ordered: 500 cases of Widget A
- Received: 500 cases of Widget B instead

- Case 3: Undelivered Widgets
  - Account: 001R0000003L8aglAC
  - Expected delivery: 06/07/2023
  - No shipping updates since: 06/06/2023

Billing Address: Search Address

Shipping Address: Search Address

Billing Street: 123 Trailblazer Ave

Important: This tool uses generative AI, which is known to include inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for the output when shared.

6. Save the updated record.

Prompt Builder Key Concepts

Prompts

Generative language models are versatile and can create different types of responses, such as text and flows. To produce responses, you tell the LLM what you want in the form of a prompt. Prompts determine the quality and relevance of the LLM's response, so it's important to craft prompts that the model can understand and use.

Prompt Design

Prompt design is the process of creating prompts that improve the quality and accuracy of the model's responses. Many models expect a certain prompt structure, so it's important to test and iterate them on the model you're using. After you understand what structure works best for a model, you can optimize your prompts for the given use case. To scale the prompt design process, you can create reusable prompts called prompt templates.

Prompt Templates

Behind the scenes, Einstein generative AI uses prompt templates. Prompt templates are reusable, detailed prompts that you can create and manage in Prompt Builder. Using prompt templates is ideal for B2C communications because templates provide a unified voice and personalization. These templates are use case-driven and include the information that helps the LLM generate a high-quality response, such as a goal, constraints, and brand guidelines. And to make sure that the prompts you send to the LLM are grounded in the most up-to-date data, prompt templates include placeholders for information that changes, such as customer names, contact information, and product prices.

Grounding

To help ensure high-quality responses, ground the prompt in data that's relevant to your request. Einstein generative AI features use your Salesforce data to add context and personalization to your prompts. The LLM uses the grounding data along with the original, generic data that it was trained on. Without grounding, a model's response can contain generic or irrelevant details. In Prompt Builder, you can easily ground prompts using merge fields and flows.

To learn more about how Einstein keeps your data secure, see The Einstein Trust Layer.

Prompt Template Type

Prompt template types are like Salesforce object types. To ensure consistent behavior across multiple prompt templates, you can reuse prompt template types and apply similar characteristics. And, similar to object permissions, users only see prompt template types that they can access.

Prompt Instructions

Prompt instructions are natural language instructions in a prompt template. Instructions describe a task for the LLM, such as "Write a description no longer than 500 characters." Your user's instructions are added to the app's prompt template, and then relevant CRM data replaces the template's placeholders. The prompt template is now a grounded prompt and sent to the LLM.

Learn more about generative AI terminology and better understand Einstein by reading the Einstein Generative AI Glossary of Terms.