



PROMPT BUILDER

# Activate Prompts in the Flow of Work

Supercharge every workflow with generative AI



**Prompt Builder** | Einstein Contact Summary

Prompt Template Workspace

Search for or select a resource to insert

Write a summary of maximum 50 words  
Provide a summary based off the following known information.

**Instructions**  
What took place from the last meeting transcript from Input:Contact.Meeting\_Notes\_\_c  
What we know about Input:Contact.Title  
Who they report to Input:Contact.ReportsTo.Name and their Input:Contact.ReportsTo.Title

**Preview** Resolution

**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 revise your prompt template as need template and regenerate the prompt prompt resolution and response. Repeat this process until you have an effective and safe prompt and response.

Cancel Save

**Einstein - Contact Summary Field**

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:

In the meeting, the customer's challenges with cloud management were discussed. The sales representative presented CloudSynergy Pro as a solution, highlighting its features, customization, scalability, and security.

✓ Added to Field

Tell me what to create for you.

Cancel Save

**Contact Information**

Name: Mr. Geoff Minor

First Name: Geoff

Last Name: Minor

Account Name: Omega

Phone: (415) 555-1212

Email: geoff.minor@example.com

**Einstein Contact Summary**

In the meeting, the customer's challenges with cloud management were discussed. The sales representative introduced...

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## Introduction

# Deliver on the Promise of Generative AI

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

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

### AI-powered cloud solutions<sup>1</sup>



Improve customer-facing employee productivity



Improve customer experience



Increase Revenue



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

\*Salesforce Your Data Your AI Research, April 2024



Salesforce is solving these challenges with the [Einstein 1 Platform](#): our trusted AI platform for all your customer data. It's the fastest way to safely unlock your organization's data to create better customer experiences, augment employees with AI to drive productivity, and improve margins and profitability. And a key component of the platform is [Prompt Builder](#).

As part of the Einstein 1 Platform, **Prompt Builder allows your organization to create custom prompts and embed trusted generative AI in the flow of work.**

This guide will walk you through creating AI-powered experiences in Prompt Builder that supercharge workflows and accelerate business results.

**Let's dive in.**

<sup>1</sup> [Salesforce Economic Impact Survey, IDC, December, 2023](#)



# What is Prompt Builder?

## What you need to know about prompts:

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

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

### Generative AI Challenges to be Solved:

- **There is no simple way to build generative AI solutions that are scalable for all users across your business without creating unique prompts for every use.**
- **One of the thorniest issues is adding business context and data into prompts to generate accurate and meaningful results to users, while protecting your customer data and internal IP.**
- **AI-powered experiences are only powerful when fully integrated within the flow of your work so you don’t have to manually copy and paste generated outputs into your existing workflow.**

## How Prompt Builder Helps

[Prompt Builder](#) makes it easy for Salesforce admins to create prompts that are customizable and reusable across the Einstein 1 Platform. This helps end users be more efficient in the flow of work so they can spend less time on repetitive tasks and more time with customers.

Requirement	How Prompt Builder Helps
<b>Build solutions that can scale, instead of each user recreating the same LLM interaction manually.</b>	<b>Build generative AI with ease.</b> Streamline building prompts by empowering Salesforce admins to create prompt templates. Build prompts once, then reuse them everywhere.
<b>Build prompts that are personalized using your data, avoiding the generic output of public generative AI models.</b>	<b>Enrich prompts with your data.</b> Create more relevant prompts grounded in your business data from CRM, Data Cloud, and external sources. Deliver results that speak the language of your customers and your business.
<b>Protect your customers’ data and internal IP.</b>	<b>Secure your prompts.</b> Build, test, and fine-tune trusted AI prompts within the Einstein Trust Layer in order to mask any sensitive information and limit bias and toxicity.
<b>Integrate AI-powered experiences into the existing flow of work so users don’t have to “swivel-chair” between systems.</b>	<b>Embed within the flow of work.</b> Enable prompted actions across Salesforce’s Einstein 1 Platform for a variety of assistive use cases on both desktop and mobile.

# Writing Effective Prompts for CRM

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



## Lifecycle of a Prompt Template



# Writing Effective Prompts for CRM

## 1 Create effective prompt templates.

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

With Prompt Builder, you can dynamically ground prompt templates with Salesforce, Data Cloud data, and even external data. This connection helps the LLM understand the context, allowing it to generate personalized responses using current and precise information. Confidential data and PII remains within Salesforce. The zero-retention agreement within the Einstein Trust Layer guarantees that any information shared with the LLM is neither stored nor used for training purposes.

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

## Elements of a high-quality prompt template.

### Who is involved, and how are they related?

*Key Ingredients: Participants, relationships, data*

#### Example:

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

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

### What is the context?

*Key Ingredients: Setting, tone & style, language*

#### Example:

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

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

### What are you trying to accomplish?

*Key Ingredients: Goal, instructions*

#### Example:

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

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

### What are the constraints?

*Key Ingredients: Limits, instructions*

#### Example:

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

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

# Writing Effective Prompts for CRM

## 2 Test and iterate on prompt templates.

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

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

## 3 Activate prompts in the flow of work

The final step of a generative AI experience is to deploy the experience right in the flow of work. As an admin, you'll have complete control over which Salesforce user can leverage the custom prompts you've built. Through a combination of assigning the appropriate permission sets, the activation of Dynamic Forms, or even invoking the prompt templates via flows, Apex, or Lightning web components, you can deploy your custom prompts to your users.



Prompt Builder allows our team at Carnegie Learning to bring our CRM data into our prompts easily with no code! This helps us augment our business processes to cut down on service rep response, email outreach, and content generation time”

Marissa Scalercio  
VP of Sales Operations,  
Carnegie Learning

# Common Use Cases of Prompt Builder

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

## Summarize and Generate Content

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

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

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

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

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

### Use Case

#### Context-Rich Emails at Scale

*Objective: Increase sales productivity to reduce deal cycles and improve accuracy of interactions.*

#### Solution:

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

### Use Case

#### Augmented Contact Summaries

*Objective: Empower service and support agents with deeper knowledge.*

#### Solution:

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

# Common Use Cases of Prompt Builder

## Enhance Automation with Generative AI

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

### ♥ Use Case

#### Automated Case Summary

*Objective: Ensure case summaries are up to date.*

#### Solution:

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

### ♥ Use Case

#### Guided workflow to generate product recommendations

*Objective: Generate different recommendations for each selected product.*

#### Solution:

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



“

Prompt Builder has allowed us to safely build generative AI experiences that save our users precious time, while still keeping our data secure and inside of our org.”

Andrew Russo  
Salesforce Architect,  
BACA Systems



# Common Use Cases of Prompt Builder

## Create AI-Assisted Applications

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

The Einstein 1 Platform provides you with the low-code tools to build, test, and optimize custom AI experiences that are grounded in your data. And Salesforce keeps you and your customers secure and compliant with leading security, governance, and privacy tools.

### Use Case

#### **HR: Recruiting & Application Tracking**

*Objective: Improve the efficiency of the job application and interviewing process and eliminate costly, manual cycles spent filling open job positions.*

#### **Solution:**

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

Use these as Copilot Actions to help interviewers prepare quickly and conduct interviews effectively.

### Use Case

#### **Professional Services: Project Management**

*Objective: Streamline the manual, redundant tracking in project planning, collaboration, and post-sale execution*

#### **Solution:**

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

# Common Use Cases of Prompt Builder

## Call Prompt Templates in Einstein Copilot

Einstein Copilot introduces a brand new AI assistant and a new UI for customers to interact with Copilot. By leveraging reasoning using LLMs, Copilot understands your intent, turns it into an action plan and takes actions on your behalf. One action Copilot can take is running a prompt template. When combining Einstein Copilot with Prompt Builder, you get an assistant that both maps out an action plan and incorporates a generated response in the follow-up action.

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

### Use Case

#### Processing Return Requests

*Objective: Enable Service agents to process complex returns without context switching.*

#### Solution:

A service agent can ask Copilot to pull up the customer's purchase history, which calls a custom prompt template that reviews the customer's purchase records and delivers a return approval recommendation. The same Copilot can also start the return process with help of a Flow custom action if the agent approves the return recommendation.

### Use Case

#### Recommend Top Accounts

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

#### Solution:

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



## CONCLUSION

# Get Started Today

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

## Resources

[Prompt Builder Demo](#)

[Trailhead - Get Started with Prompts and Prompt Studio](#)

[Trailhead - Quick Start: Prompt Builder](#)

[Introducing Prompt Builder: Activate Prompts in the Flow of Work](#)

[!\[\]\(65e8f8322c024ac6fcf86b65a793ebdd\_img.jpg\) Talk to an Expert](#)

