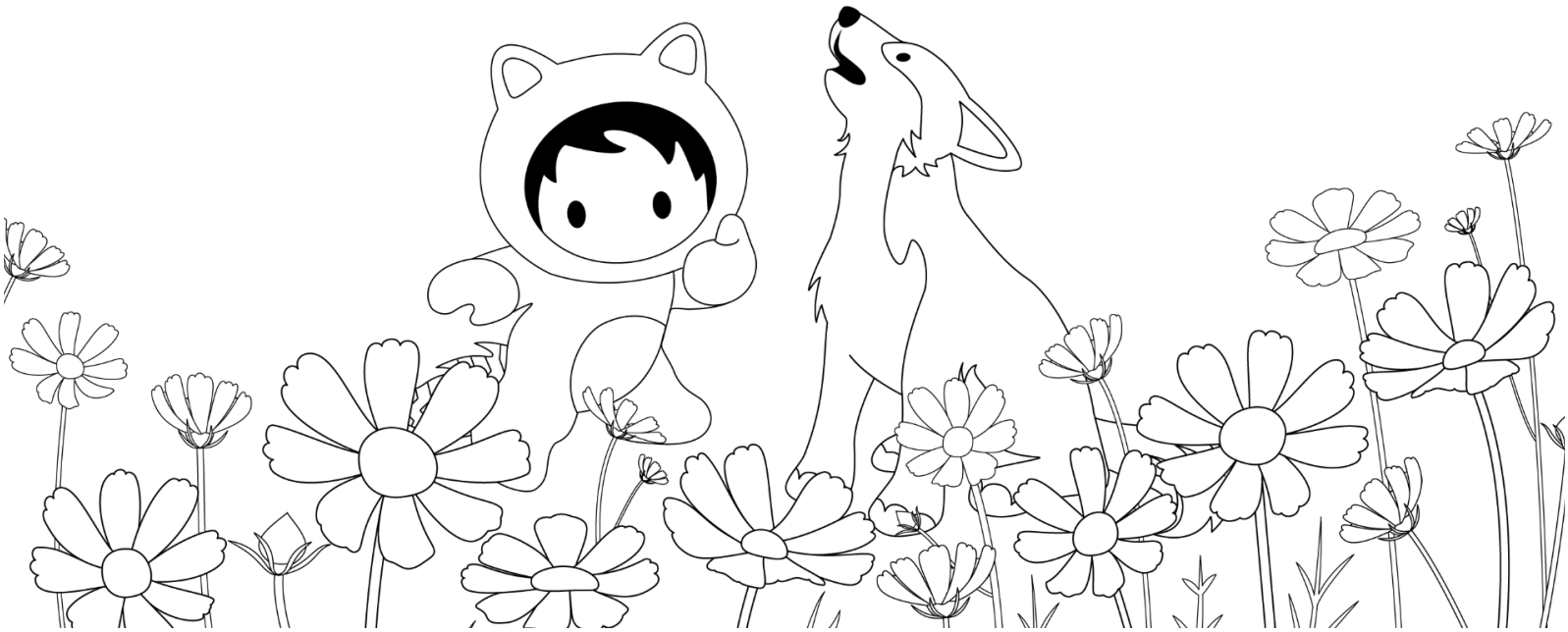
Salesforce Hands-on Training

Elevate Agents with RAG

EXERCISE GUIDE



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Exercise 0: Get Set Up: Log In To Your Org

Goal: Log in to your practice org and update your personal information.

Task 1: Get your org credentials.

1. Open a Chrome browser.
2. Go to this signup link for your demo environment -> sforce.co/orgfarm
3. Enter the event code: **TDX25RAG** (case sensitive!)
4. Copy/paste your username and password in separate area for reference.
5. Use a guest/private browser tab or new persona (if using Chrome) to login with credentials
6. You will retain access to this demo org for a limited time.
7. Please be thoughtful and respectful with your activity.

Task 2: Log In to your Org

1. Navigate to login.salesforce.com.
2. Log in to your org.
3. Go to **Setup** in the top-right corner and select **Setup**.

Task 3: Enable Einstein and Agents in your Org

1. Enable Einstein.
    a. Use the Setup Quick Find to search for and select **Einstein Setup**.

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b. Use the toggle to **Turn on Einstein**.
c. Refresh the page.

2. Enable Agents.

a. Use the Setup Quick Find to search for and select **Agents**.
b. Use the toggle to turn on **Agentforce**.

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Exercise 1: Build a PDF RAG Service Agent

In this exercise, you will create a PDF RAG service agent to answer questions based on the PDF that will be uploaded into the data library and handle escalation. Here are the steps to follow:

1. Create a new PDF RAG service agent.

Instructions:

Task 1: Create a new PDF RAG service agent.

1. Use the Setup Quick Find to search for and select **Agents**.
2. Select **+ New Agent**.
3. Select **Agentforce Service Agent** as the type.
4. Select **Next**.
5. Deselect the topics listed by selecting the **Added** button for each, so that **Escalation** and **General FAQ** are the two remaining topics. (*Note: If you are unable to deselect the topics, you can remove them from the dropdown menu once the agent is created.)*
6. Select **Next**.
7. Define the settings of your new agent:
    a. Name: `PDF RAG Service Agent`
    b. Role: `Your role is to answer questions.`
    c. Company: `Coral Cloud Resorts is a luxury hospitality resort, operating in some of the world's most glamorous destinations, providing guests with unforgettable`

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```
experiences, exquisite cuisine, and adventurous and
relaxing activities.
```

d. Agent User: **New Agent User**
e. Check the box for **Enrich event logs with conversation data**.

8. Select **Next**.
9. Select **Create**.
10. Click the back arrow to come out of the Agent Builder.

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Exercise 2: Set Up a Data Library Using a PDF

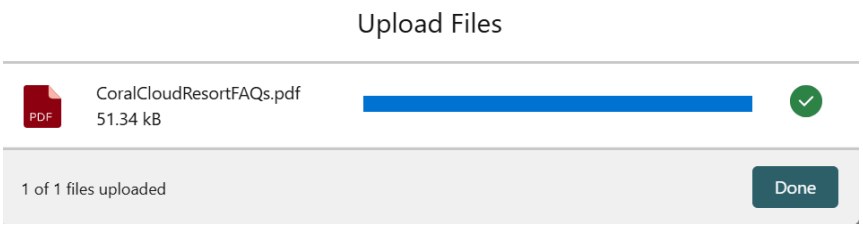
In this exercise, you will create a data library using a PDF. Here are the steps to follow:

1. Create a new data library using the FAQs PDF.
2. Observe what happens when the file is uploaded.

Instructions:

Task 1: Create a new data library using the FAQs PDF.

1. Download and save Coral Cloud Resorts FAQs.pdf to your desktop.
2. Use the Setup Quick Find to search for and select **Agentforce Data Library.**
3. Select **New Library +**.
4. Add the new library details:
    a. Name: `CC FAQs`
    b. API Name: [leave as default]
    c. Description: `A compilation of questions frequently asked by customers along with recommended answers.`
    d. Select **Save**.
5. Add the PDF to the data library.
    a. Go to the **File Upload** tab.
    b. Select **Upload Files**, locate the **Coral Cloud Resorts FAQs.pdf**, and select it.
    c. Select **Done**. *Note: It might take a few minutes for the file to be uploaded.*



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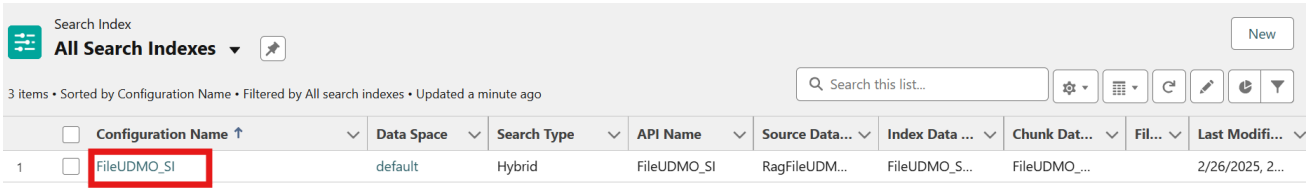
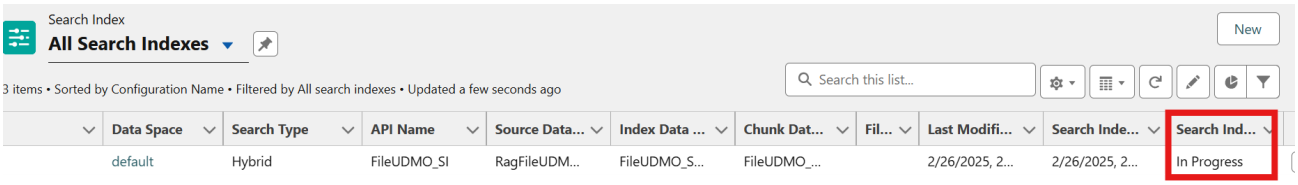
NOTE	An index of the document's content will be automatically created. This index allows the AI to efficiently retrieve relevant information from the PDF. A retriever is also created to facilitate the search and extraction of answers from the document when queries are made.

Task 2: Observe what happens when the file is uploaded.

1. Use the App Launcher to open the **Data Cloud** app.
2. Open the **Search Index** tab. You may need to use the **More** dropdown menu.
3. Observe a new index is created named **FileUDFMO_SI**.



4. Observe its state by looking at the Search **Index Last Run Status** field. Note: it changes from **blank** to **In Progress** and then to **Ready** (this step can take 20 to 30 minutes).



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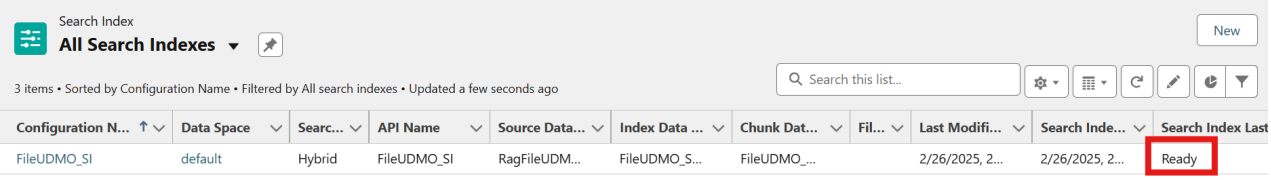
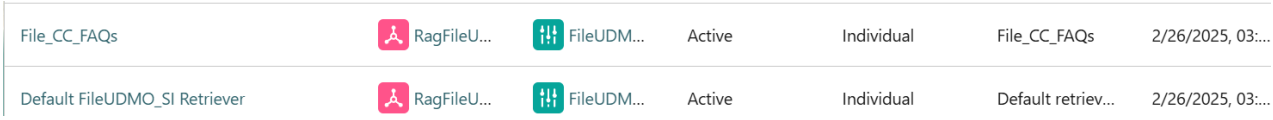


5. Open the **Einstein Studio** tab, select the **Retrievers** subtab. Observe two retrievers are created - a default retriever and a retriever for the specific PDF.



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Exercise 3: Assign Data Library to Agent and Test in Agent Builder

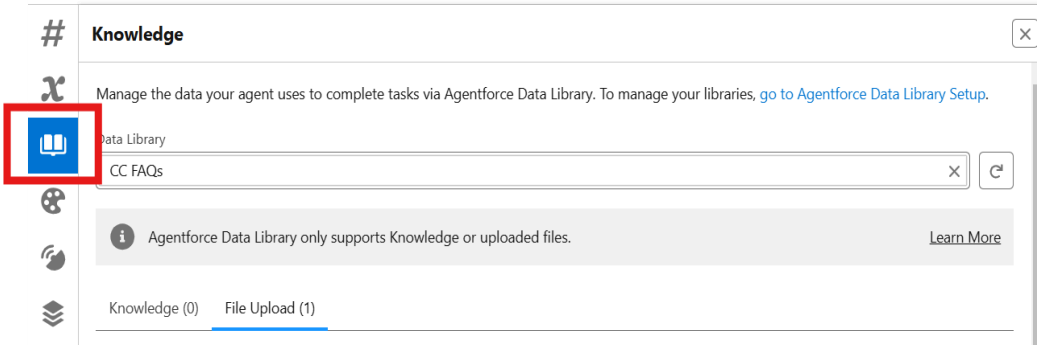
In this exercise, you're going to assign the new data library to your RAG agent, ensure the agent is performing as expected, and then activate the agent. Here are the steps to follow:

1. Assign the data library to the agent in Agent Builder.
2. Test the agent.
3. Activate the agent.

Instructions:

Task 1: Assign the data library to the agent in Agent Builder.

1. In Setup, use Quick Find to search for and select **Agents**.
2. Select the agent you created earlier named **PDF RAG Service Agent**.
3. Select **Open in Builder.**
4. On the left side, select the **Knowledge** icon.



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a. In the **Select a library** field, select **CC FAQs**.
b. Select **Save**.

Task 2: Test the agent.

1. The agent is now ready to answer questions based on your FAQ information in the PDF. Test it using the below utterances:
   a. `What time is check in at the resort?`
   b. `Can I bring my pet?`
   c. `Do you provide a hairdryer in the room?`

Task 3: Activate the agent.

1. Select **Activate**.

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Exercise 4: Troubleshoot the Agent

In this exercise, you'll walk through a set of troubleshooting steps to identify potential issues with your agent. The goal is to isolate the problem and apply the appropriate solution. Here are the steps to follow:

1. View the data in Data Explorer.
2. Run a query in Query Editor.
3. View the standard prompt template.
4. Update the standard prompt template.
5. Retest the agent.

Instructions:

Task 1: View the data in Data Explorer.

1. Use the App Launcher to open the **Data Cloud** app.
2. Select the **Data Explorer** tab.
3. Set the object filters:
    a. Data Space: **default**
    b. Object: **Data Model Object**
    c. Select Object: **RAGFileUDMO**
        i. You will see the content type is **application/pdf**.
    d. Click the **X** to remove the RAGFile UDMO DMO.
    e. Select object **FileUDMO_SI_Chunk_dlm**
        i. You will see the content from the PDF in the **Chunk** column.

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NOTE	If you don't see a result, don't worry! It can take up to 30 minutes for indexing to complete. Come back later and try again.

Task 2: Run a query in Query Editor.

1. Staying in the Data Cloud app, open the **Query Editor** tab (you may need to select it from the **More** menu.)
2. Select **New** and add details for the workspace:
    a. Name: `FAQ Query`
    b. Data Space: **default**
    c. Select **Save**.
3. Run a query using the search index created for the data library.
    a. From the objects on the left, select **Data Model Objects**.
    b. In the second pane,
        i. Locate and select **FileUDMO_SI_chunk__dlm**.
        ii. Select **Create Query**.
        iii. Select **Run Query**.
        iv. Select the **dropdown arrow** on the Chunk column and select **Wrap text**.
        v. Observe the content from the PDF.

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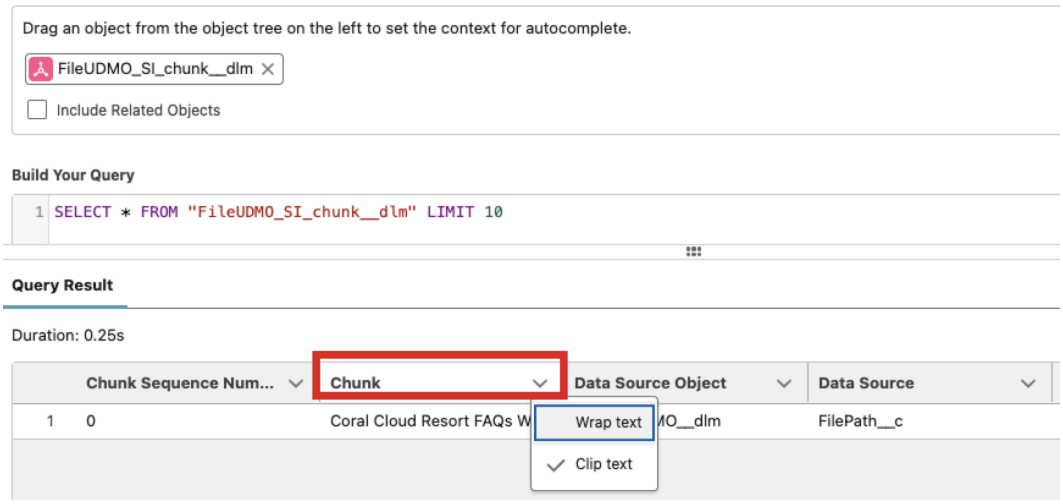


c. In the second pane,

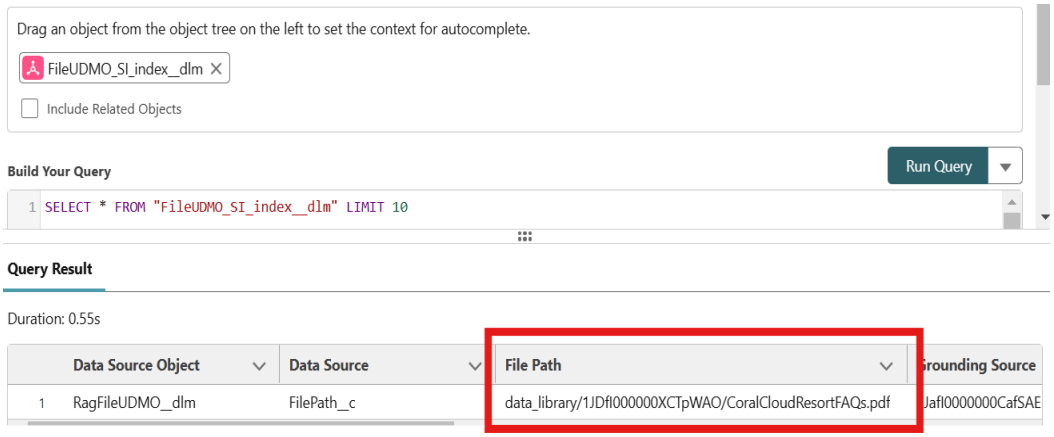
   i. Locate and select **FileUDMO_SI_index__dlm**.

   ii. Select **Create Query**.

   iii. Select **Run Query**.

   iv. In the File Path column, observe the PDF.

d. Select **Save**.



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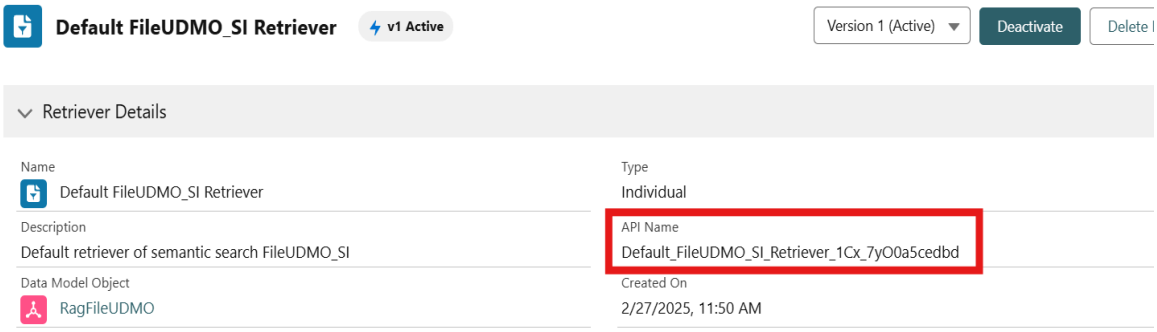
Task 3: View the standard prompt template.

1. Staying in the Data Cloud app, open the **Einstein Studio** tab.
2. Select **Retrievers**.
3. Select **Default FileUDMO_SI Retriever**.
4. Copy the **API Name** (it will look something like Default_FileUDMO_SI_Retriever_1Cx_7yO0a5cedbd.)



5. Open **Setup** in a new browser tab then use the Quick Find to search for and select **Prompt Builder**.
6. Select the prompt template named **Answer Questions with Knowledge**.
7. Select **Test Inputs**.
8. In the **Query** box type `What time is check in at the resort?`
9. In the **Retriever ID** box paste the value from the API Name field.
10. Select **Preview**.

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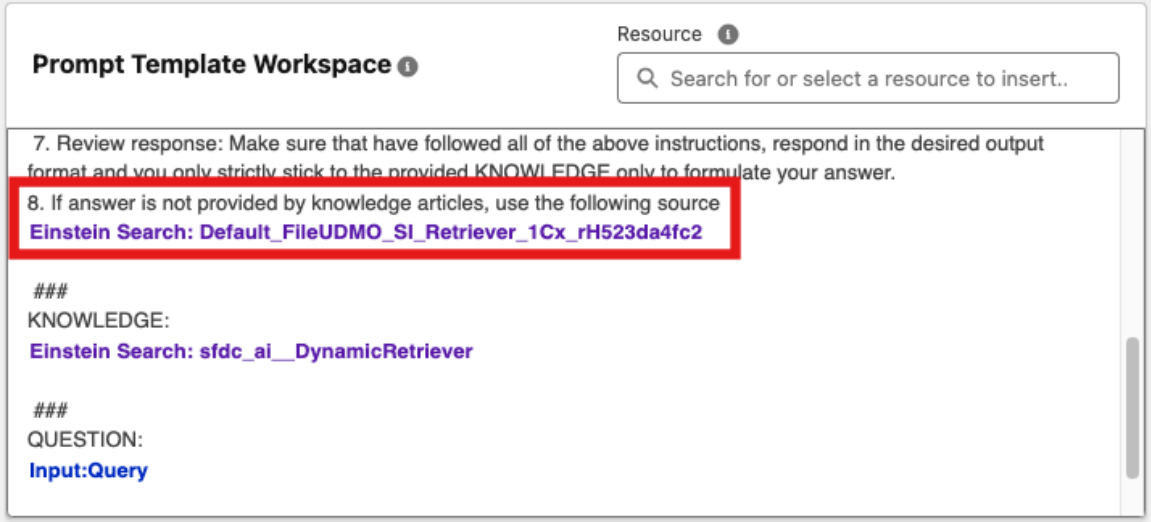
Task 4: Update the standard prompt template.

1. Staying in the Answer Questions with Knowledge prompt template, select **Deactivate**.
2. Select the dropdown arrow on the **Save As** button.
3. Select **Save as a New Version**.
4. In the Prompt Template Workspace, scroll down to the end of the Instructions section.
5. Add a new line at the end and enter: `8. If answer is not provided by knowledge articles, use the following source`
6. Add a space and then select **Resource** > **Einstein Search** > **RagFileUDMO** >**Default_FileUDMO_SI_Retriever**



7. In the Configuration sidebar, configure the Default_FileUDMO_SI_Retriever
    a. Search Text: **Free Text** > **Query**

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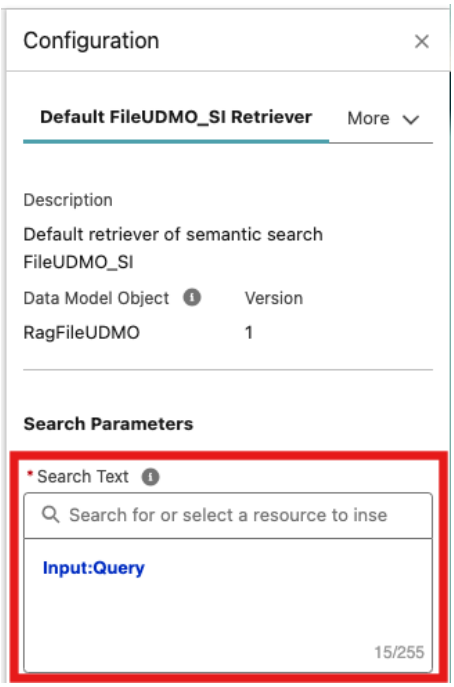

8. In the Preview panel, select **Test Inputs**.
9. In the **Query** box type `What time is check in at the resort?`
10. In the **Retriever ID** box paste the value from the API Name field.
11. Select **Save & Preview**.
12. Select **Activate**.
13. Select the **back arrow** to exit Prompt Builder.

Task 5: Retest the agent.

1. Use the Setup Quick Find to search for and select **Agents**.
2. Select the **PDF RAG Service Agent**.

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3. Select **Open in Builder**.
4. In the Conversation Panel, retest the agent using the below utterances:
    a. `What time is check in at the resort?`
    b. `Can I bring my pet?`
    c. `Do you provide a hairdryer in the room?`

Congratulations! You have successfully created a service agent that can answer questions based on the PDF uploaded to the data library.

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Optional Exercise 5: Create a New Search Index

In this exercise, you will create a new custom search index and rename it. Here are the steps to follow:

1. Create a custom index.

Instructions:

Task 1: Create a custom index.

1. Use the App Launcher to go to **Data Cloud**.
2. Go to the **Search Index** tab. You may need to use the **More** dropdown menu.
3. Locate **FileUDMO_SI** and confirm its status in the column titled **Search Index Last Run Status**. When the status is **Ready** proceed with the next step.

> **NOTE** We are manually creating a new index to demonstrate the process and to assign a custom name to the retriever. Once saved, this manual indexing process usually takes 10–20 minutes to complete. The status will change from blank to **In Progress**, and finally to **Ready**.

4. Select **New** to create a new search index for data ingestion.
    a. Select **Easy Setup,** then select **Next**.
    b. Select **RagFileUDMO**, then select **Next**.
    c. Change the Search Index Configuration Name to `FAQUDMO`.
5. Select **Save**.

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Optional Exercise 6: Create a Flex Template for PDF Data Retrieval and Response Generation

In this exercise, you will create a prompt template to retrieve and generate responses from the indexed data of the PDF. Here are the steps to follow:

1. Create a new prompt template.
2. Configure the prompt template workspace.
3. Test the prompt.

Instructions:

Task 1: Create a new prompt template.

1. Go to **Setup** in the top-right corner and select **Setup**.
2. Use Setup Quick Find to locate and open **Prompt Builder**.
3. Select **New Prompt Template**.
4. Configure the template as follows:
    a. Prompt Template Type: **Flex**
    b. Prompt Template Name: `Customer FAQs`
    c. API Name: [Keep default]
    d. Template Description: `Answer our most common customer questions.`
    e. Name: `Customer Question`
    f. API Name: [Keep the default]
    g. Source Type: **Free Text**
5. Select **Next**.

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Task 2: Configure the prompt template workspace.

1. Paste the following text into the Prompt Template Workspace:

   ```
   Your role is to answer the question:
   QUESTION_QUERY

   Please use the following information to answer:
   FAQ_RECOMMENDED_ANSWERS

   Your tone should be friendly and informative as if you were
   speaking directly to the customer.
   ```

2. Delete the placeholders and replace with the corresponding merge fields (select the Resource search box to access merge fields):
   a. QUESTION_QUERY: **Free Text > Customer Question**
   b. FAQ_RECOMMENDED_ANSWERS: **Einstein Search > RagFileUDMO > Default FileUDMO_SI Retriever**
3. In the Configuration sidebar, configure the Default FAQUDMO Retriever:
   a. Search Text: **Free Text > Customer Question**

Task 3: Test the prompt.

1. In the Preview panel, select **Test Inputs**.
2. Enter a relevant question into the Customer Question field, such as: `What time is check in at the resort?`
3. Select **Save & Preview**.

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a. In the **Resolution** panel, examine the prompt that was generated. The JSON structure represents the weighted responses from Einstein Search.
b. In the **Response** panel, examine the generated response.

4. Enter another prompt in the Customer Question field, such as: `Can I bring a pet?`
5. Select **Preview**.
6. Select **Activate**. This prompt template can now be used in a custom action in your agent.

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