

mlangles Generative AI

Chat with *salesforce*



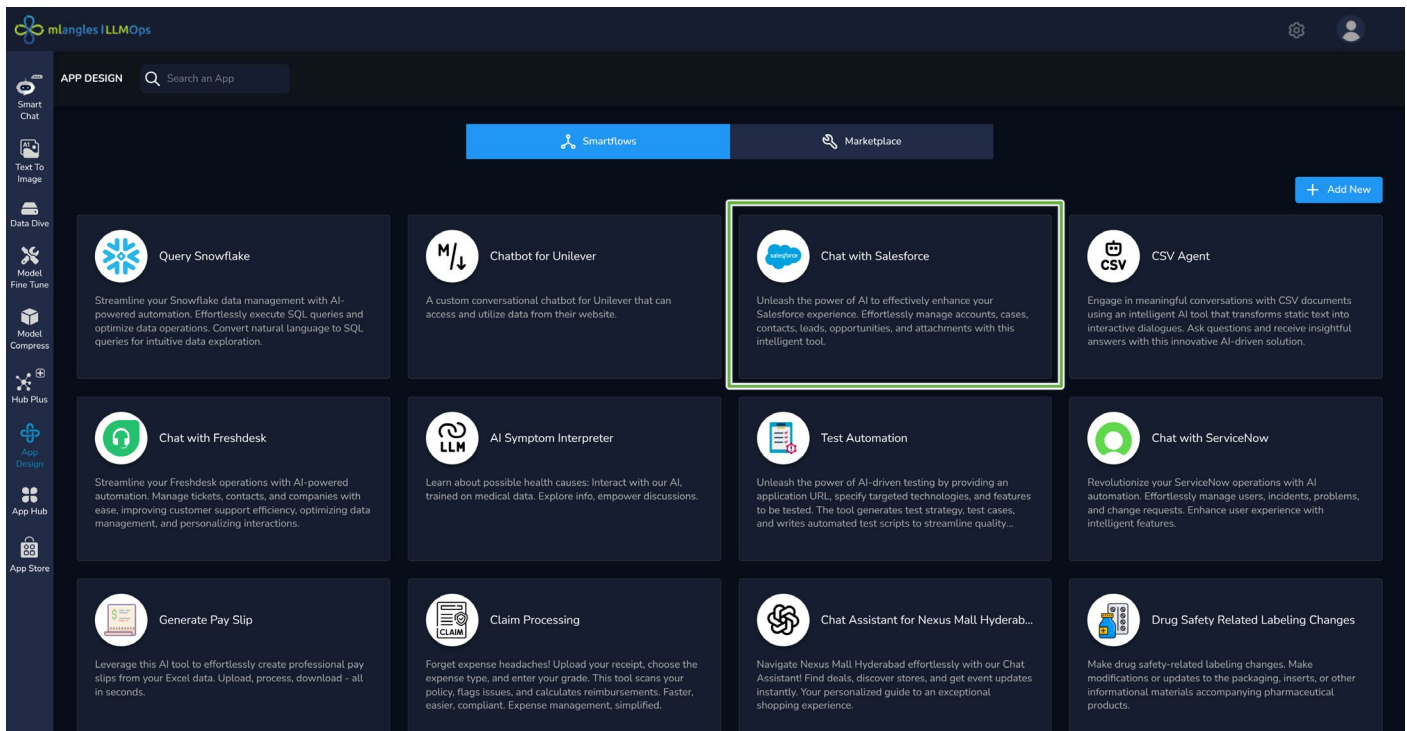
Salesforce is a powerful Customer Relationship Management (CRM) platform used by enterprises worldwide.

However, interacting with Salesforce data can present challenges for users. The platform offers a complex interface and requires knowledge of [SOQL](#) (Salesforce Object Query Language) to retrieve specific data. This can lead to a steep learning curve for new users, requiring extensive training and slowing down overall productivity. Additionally, even for experienced users, performing basic tasks can be time-consuming, hindering efficiency. This use case addresses these challenges by introducing a conversational approach to interacting with Salesforce data through an application built using our innovative LLMOps platform.

This low-code/no-code application empowers users to perform operations on Standard Objects using natural language. This eliminates the need to learn [SOQL](#) or navigate the complexities of the Salesforce GUI, making Salesforce data more accessible and user-friendly for everyone.

The use case is an LLM application built using our low-code, no-code platform that allows users to interact with Salesforce using natural language. It enables users to perform various CRUD (Create, Read, Update, Delete) operations on standard Salesforce objects (SOBJects) such as Accounts, Attachments, Cases, Contacts, Leads, and Opportunities, without having to write complex [SOQL](#) (Standard Object Query Language) queries or navigate through the Salesforce GUI.





The application consists of four components

Chat Model

This component handles the natural language processing and generation, enabling users to communicate with the application using conversational language.

Salesforce Operations Tool

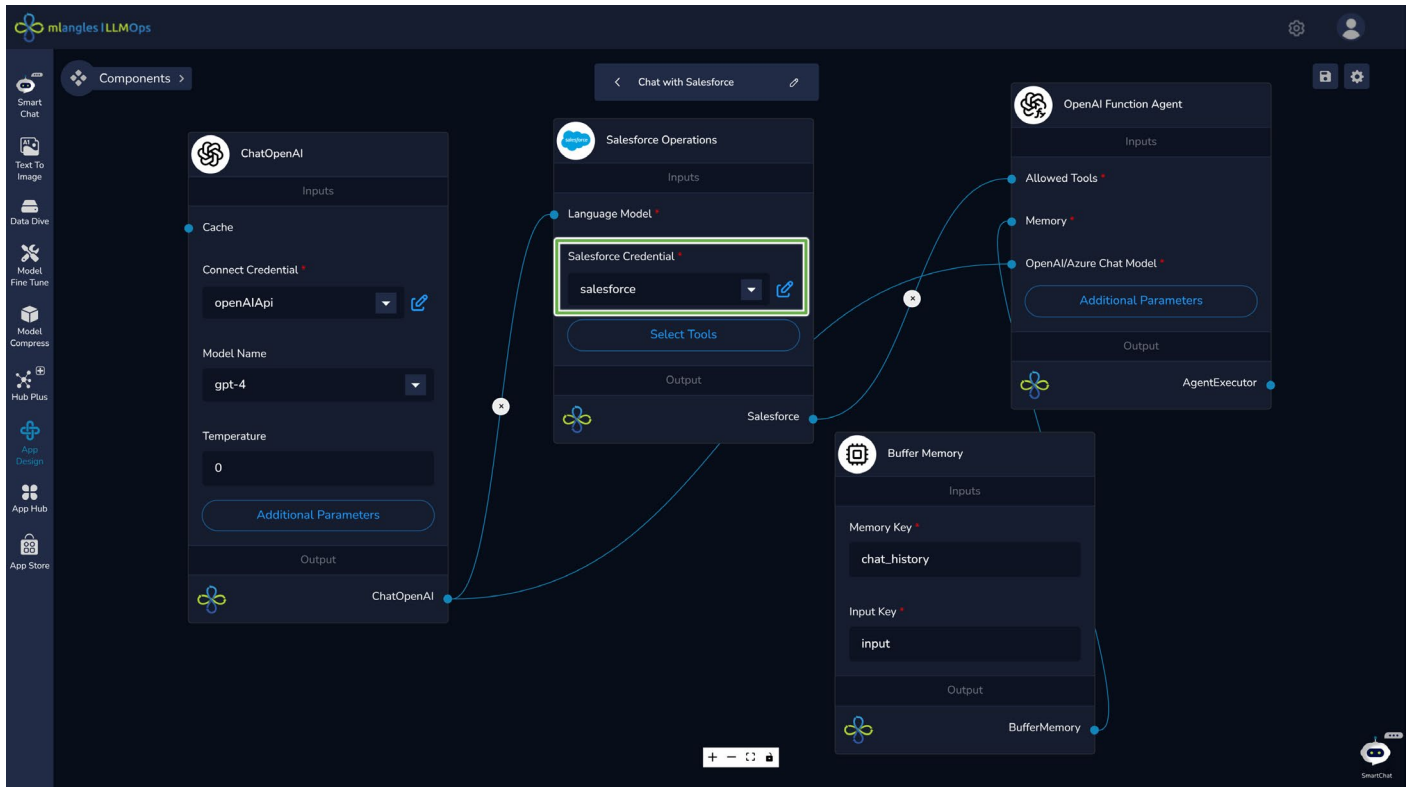
This component is responsible for executing the desired operations on Salesforce SObjects based on the user's input.

Buffer Memory

This component acts as a temporary storage for intermediate results and information needed for the application to function.

Agent

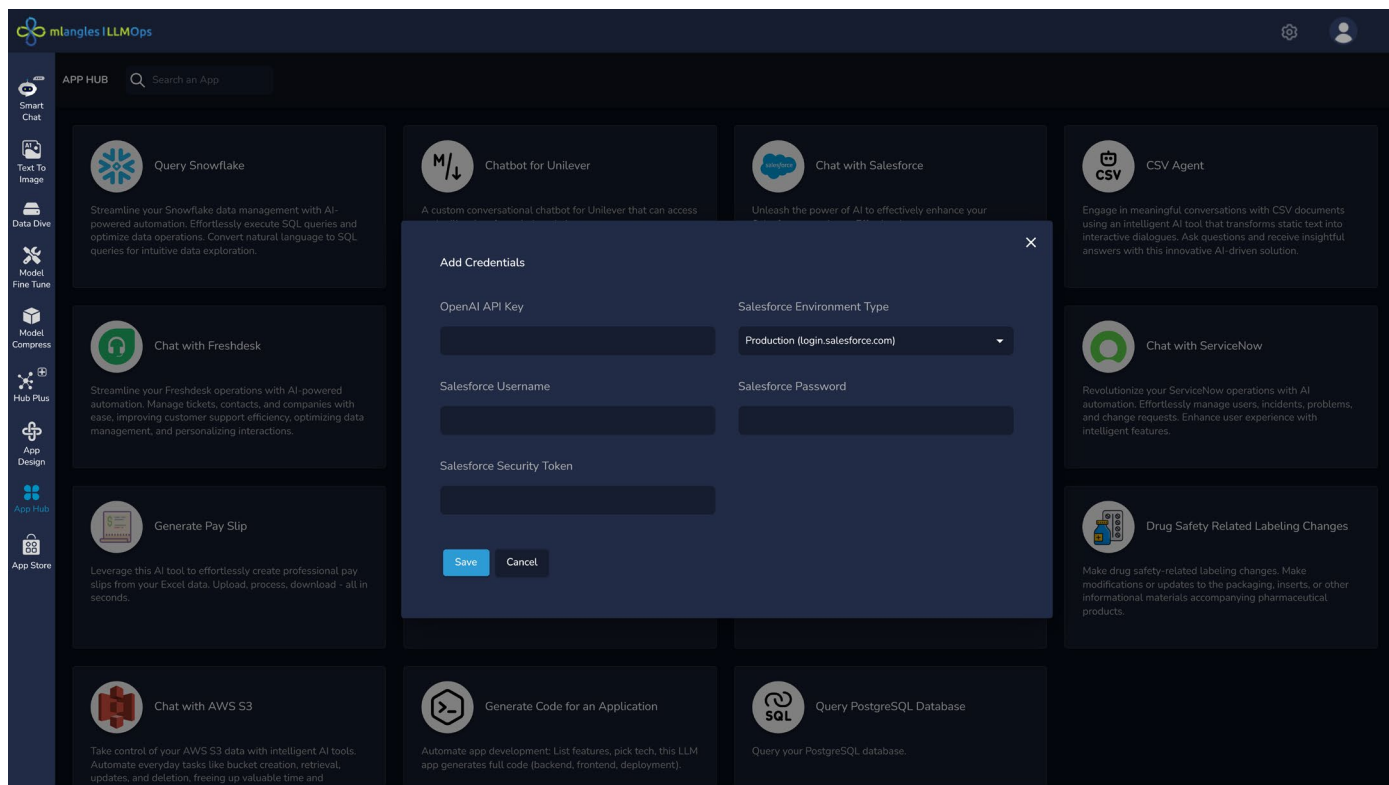
This component orchestrates the interaction between the chat model, Salesforce operations tool, and buffer memory, ensuring a seamless user experience.



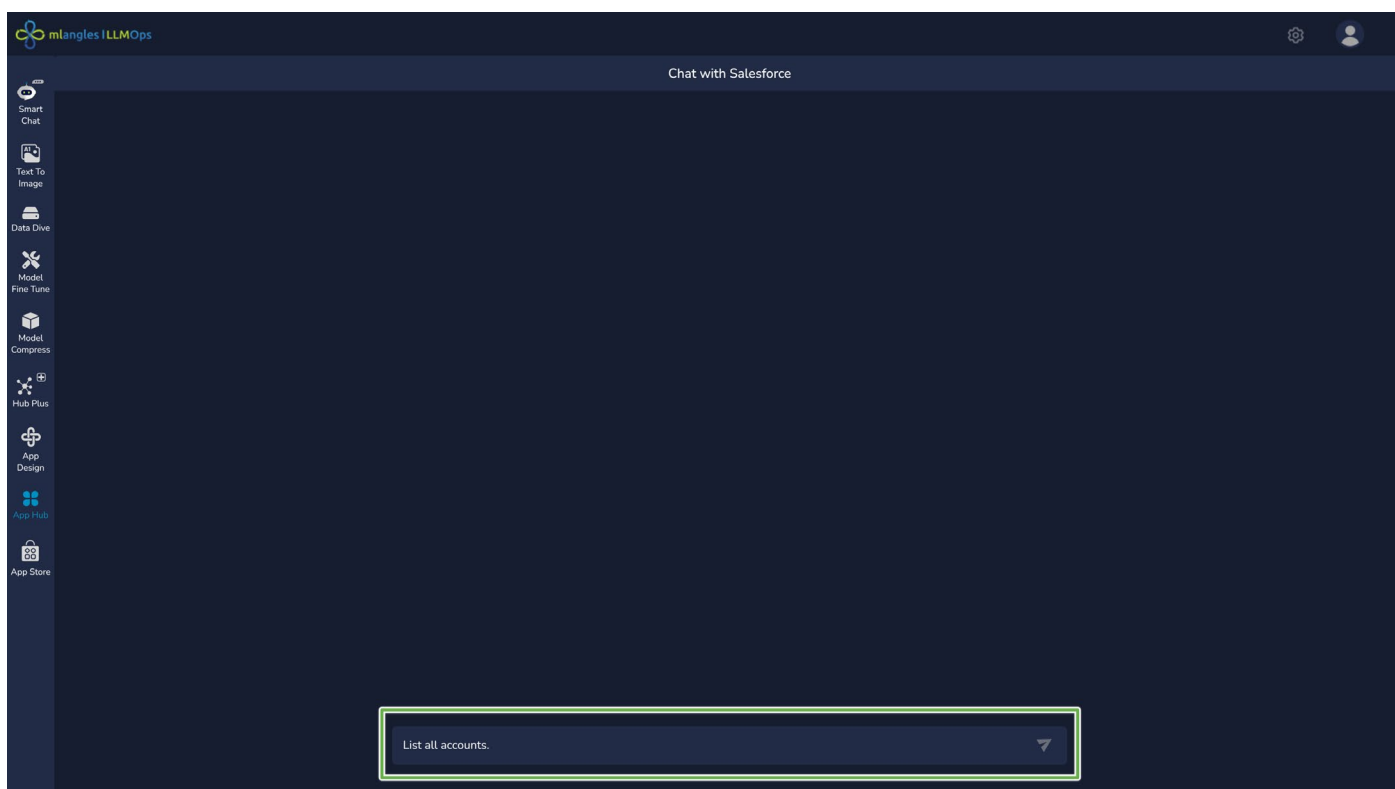
To get started, users need to provide the following credentials:

- Salesforce Environment Type
(Production [login.salesforce.com]
or Sandbox [test.salesforce.com])
- Salesforce Username
- Salesforce Password
- Salesforce Security Token





Once authenticated, users can perform various operations on the supported SObjects using natural language commands.



List of Supported Operations

Accounts

- ✔ List Accounts
- ✔ Query Accounts
- ✔ Create Accounts
- ✔ Delete Account by Id
- ✔ Delete Account by Name
- ✔ Update Account by Id
- ✔ Update Account by Name

Attachments

- ✔ List Attachments
- ✔ Query Attachments
- ✔ Create Attachments
- ✔ Delete Attachment by Id
- ✔ Update Attachment by Id

Cases

- ✔ List Cases
- ✔ Query Cases
- ✔ Create Cases
- ✔ Delete Cases by Id
- ✔ Update Cases by Id

Contacts

- ✔ List Contacts
- ✔ Query Contacts
- ✔ Create Contacts
- ✔ Delete Contacts by Id
- ✔ Update Contacts by Id

Leads

- ✔ List Leads
- ✔ Query Leads
- ✔ Create Leads
- ✔ Delete Leads by Id
- ✔ Update Leads by Id

Opportunities

- ✔ List Opportunities
- ✔ Query Opportunities
- ✔ Create Opportunities
- ✔ Delete Opportunities by Id
- ✔ Update Opportunities by Id

Note:

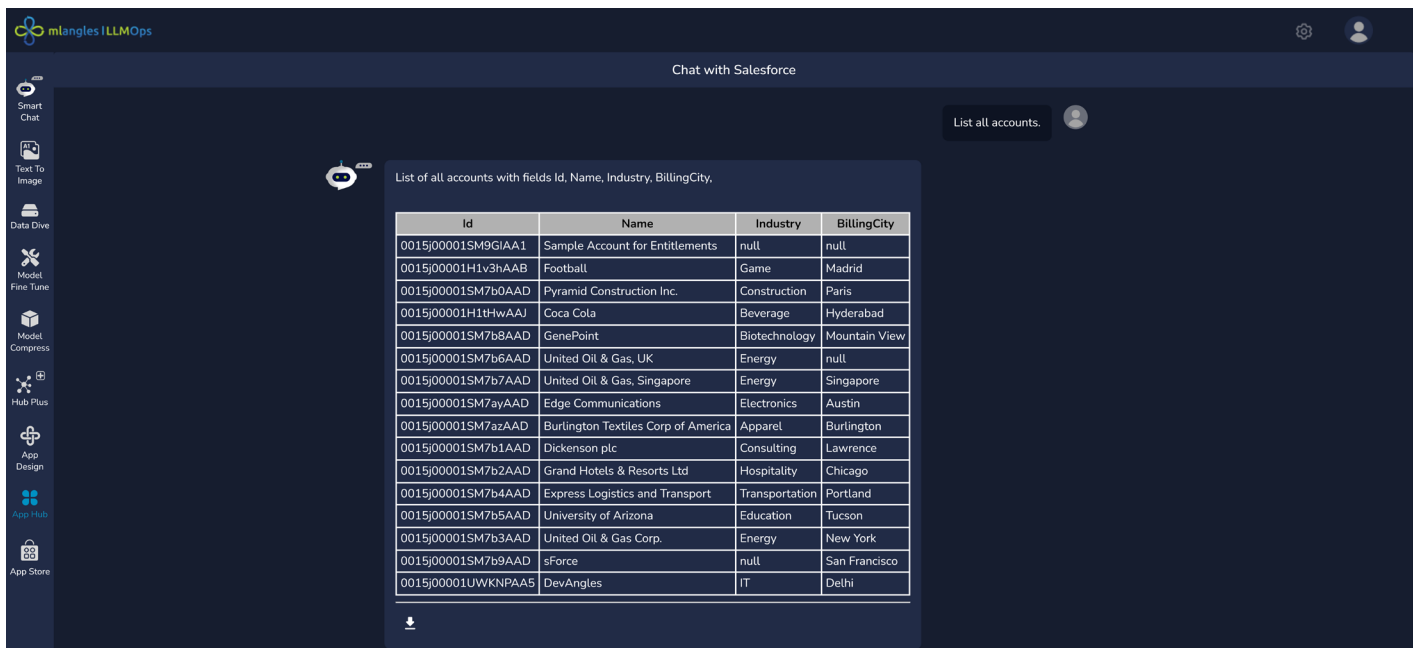
More operations and functionalities can be added as per the requirements of the enterprise.

Here are some examples

Accounts:

- List Accounts

Query: List all accounts.



Chat with Salesforce

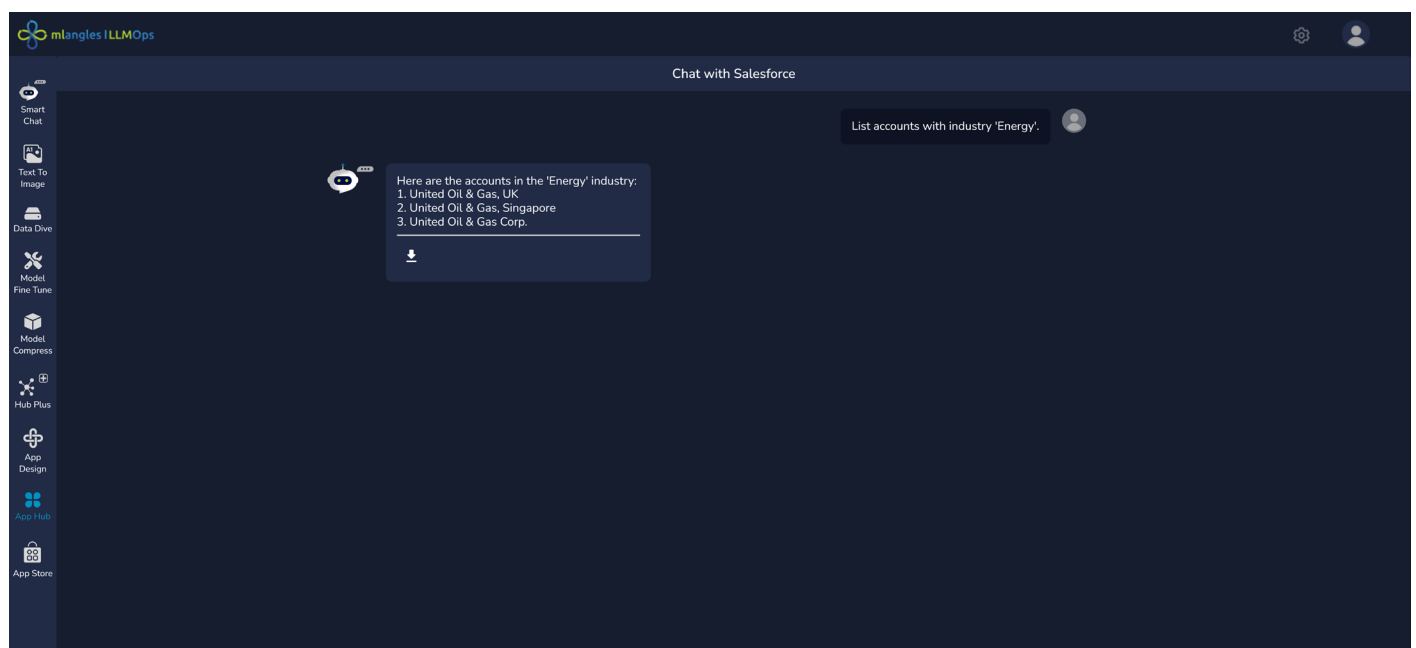
List all accounts.

List of all accounts with fields Id, Name, Industry, BillingCity.

Id	Name	Industry	BillingCity
0015j00001SM9GIAA1	Sample Account for Entitlements	null	null
0015j00001H1v3hAAB	Football	Game	Madrid
0015j00001SM7b0AAD	Pyramid Construction Inc.	Construction	Paris
0015j00001H1tHwAAJ	Coca Cola	Beverage	Hyderabad
0015j00001SM7b8AAD	GenePoint	Biotechnology	Mountain View
0015j00001SM7b6AAD	United Oil & Gas, UK	Energy	null
0015j00001SM7b7AAD	United Oil & Gas, Singapore	Energy	Singapore
0015j00001SM7ayAAD	Edge Communications	Electronics	Austin
0015j00001SM7azAAD	Burlington Textiles Corp of America	Apparel	Burlington
0015j00001SM7b1AAD	Dickenson plc	Consulting	Lawrence
0015j00001SM7b2AAD	Grand Hotels & Resorts Ltd	Hospitality	Chicago
0015j00001SM7b4AAD	Express Logistics and Transport	Transportation	Portland
0015j00001SM7b5AAD	University of Arizona	Education	Tucson
0015j00001SM7b3AAD	United Oil & Gas Corp.	Energy	New York
0015j00001SM7b9AAD	sForce	null	San Francisco
0015j00001UWKNPAA5	DevAngles	IT	Delhi

- Query Accounts

Query: Find accounts with industry 'Energy'.



Chat with Salesforce

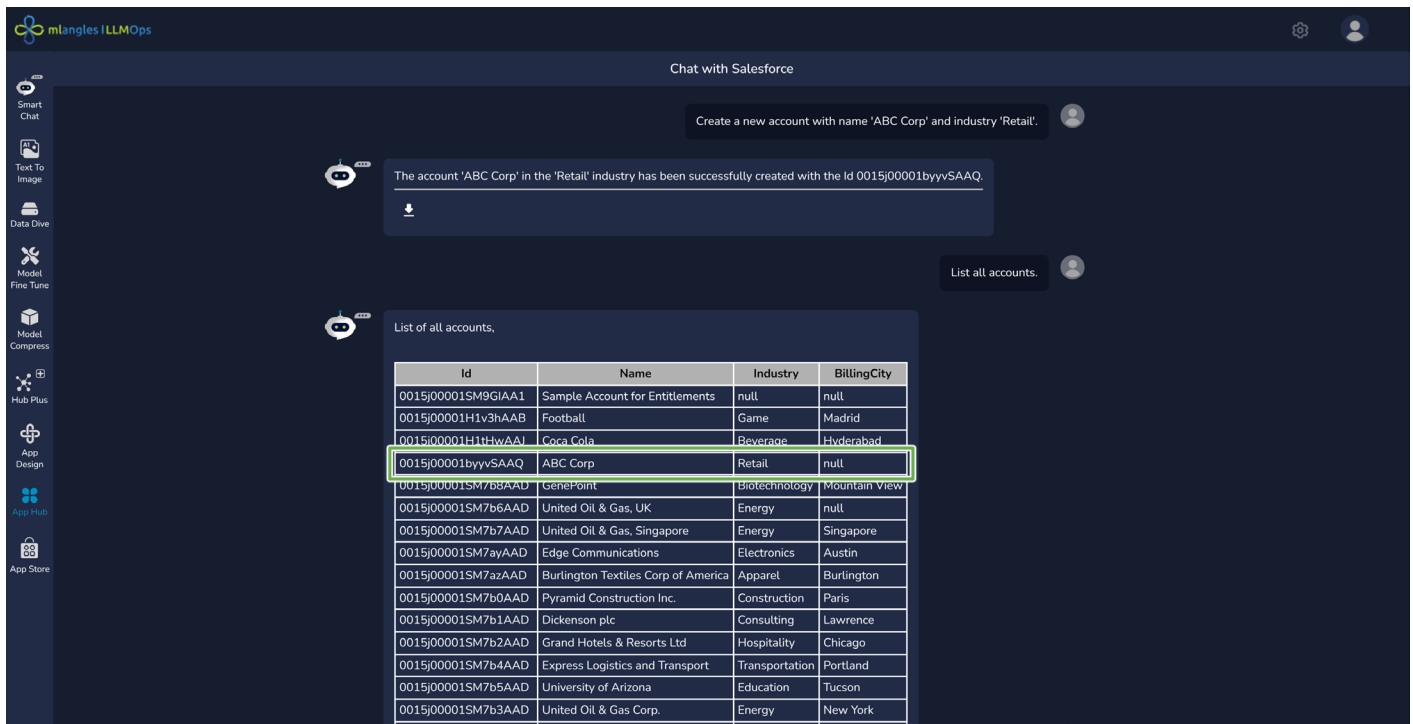
List accounts with industry 'Energy'.

Here are the accounts in the 'Energy' industry:

1. United Oil & Gas, UK
2. United Oil & Gas, Singapore
3. United Oil & Gas Corp.

- Create Accounts

Query: Create a new account with name 'ABC Corp' and industry 'Retail'.

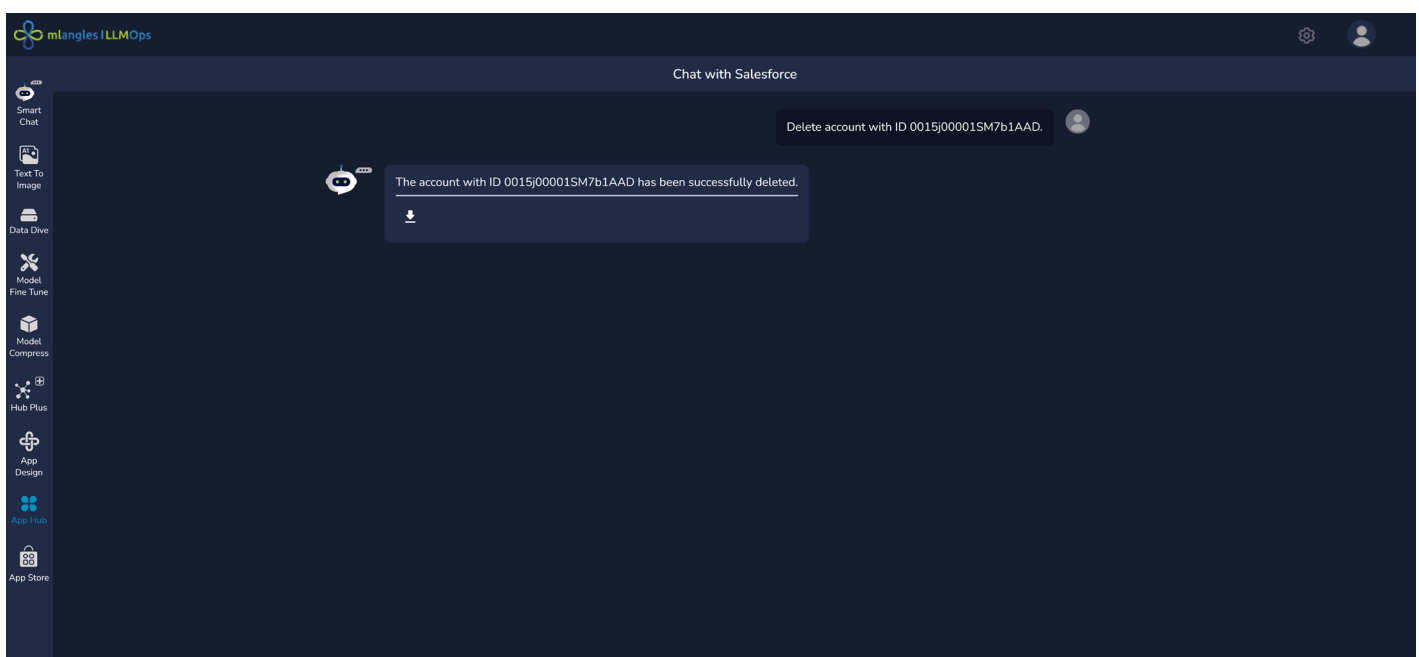


The screenshot shows the 'Chat with Salesforce' interface. A user query 'Create a new account with name 'ABC Corp' and industry 'Retail'.' is entered. The system responds with a confirmation message: 'The account 'ABC Corp' in the 'Retail' industry has been successfully created with the Id 0015j00001byyvSAAQ.' Below this, a button 'List all accounts.' is visible. The system then displays a table titled 'List of all accounts.' with the following data:

Id	Name	Industry	BillingCity
0015j00001SM9GIAA1	Sample Account for Entitlements	null	null
0015j00001H1v3hAAB	Football	Game	Madrid
0015j00001H1tHwAA1	Coca Cola	Beverage	Hyderabad
0015j00001byyvSAAQ	ABC Corp	Retail	null
0015j00001SM7b8AAD	GenePoint	Biotechnology	Mountain View
0015j00001SM7b6AAD	United Oil & Gas, UK	Energy	null
0015j00001SM7b7AAD	United Oil & Gas, Singapore	Energy	Singapore
0015j00001SM7ayAAD	Edge Communications	Electronics	Austin
0015j00001SM7azAAD	Burlington Textiles Corp of America	Apparel	Burlington
0015j00001SM7b0AAD	Pyramid Construction Inc.	Construction	Paris
0015j00001SM7b1AAD	Dickenson plc	Consulting	Lawrence
0015j00001SM7b2AAD	Grand Hotels & Resorts Ltd	Hospitality	Chicago
0015j00001SM7b4AAD	Express Logistics and Transport	Transportation	Portland
0015j00001SM7b5AAD	University of Arizona	Education	Tucson
0015j00001SM7b3AAD	United Oil & Gas Corp.	Energy	New York

- Delete Account by ID

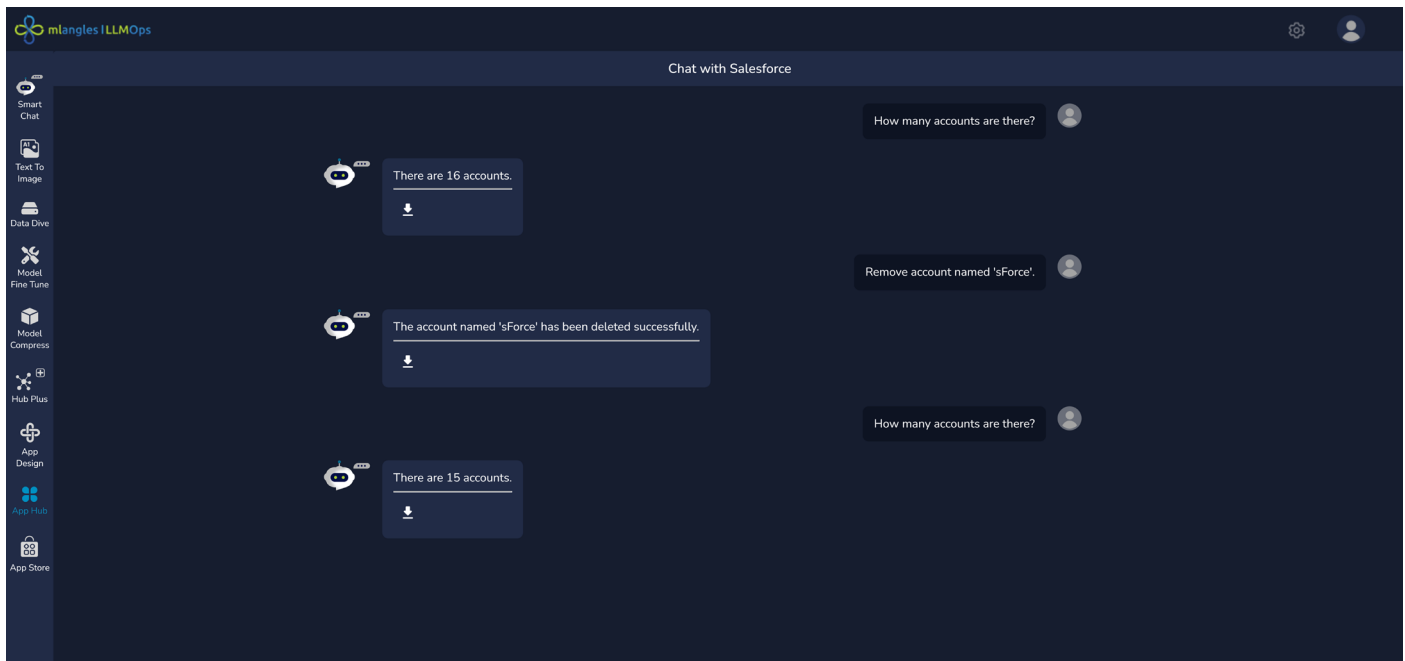
Query: Delete account with ID 0015j00001SM7b1AAD.



The screenshot shows the 'Chat with Salesforce' interface. A user query 'Delete account with ID 0015j00001SM7b1AAD.' is entered. The system responds with a confirmation message: 'The account with ID 0015j00001SM7b1AAD has been successfully deleted.'

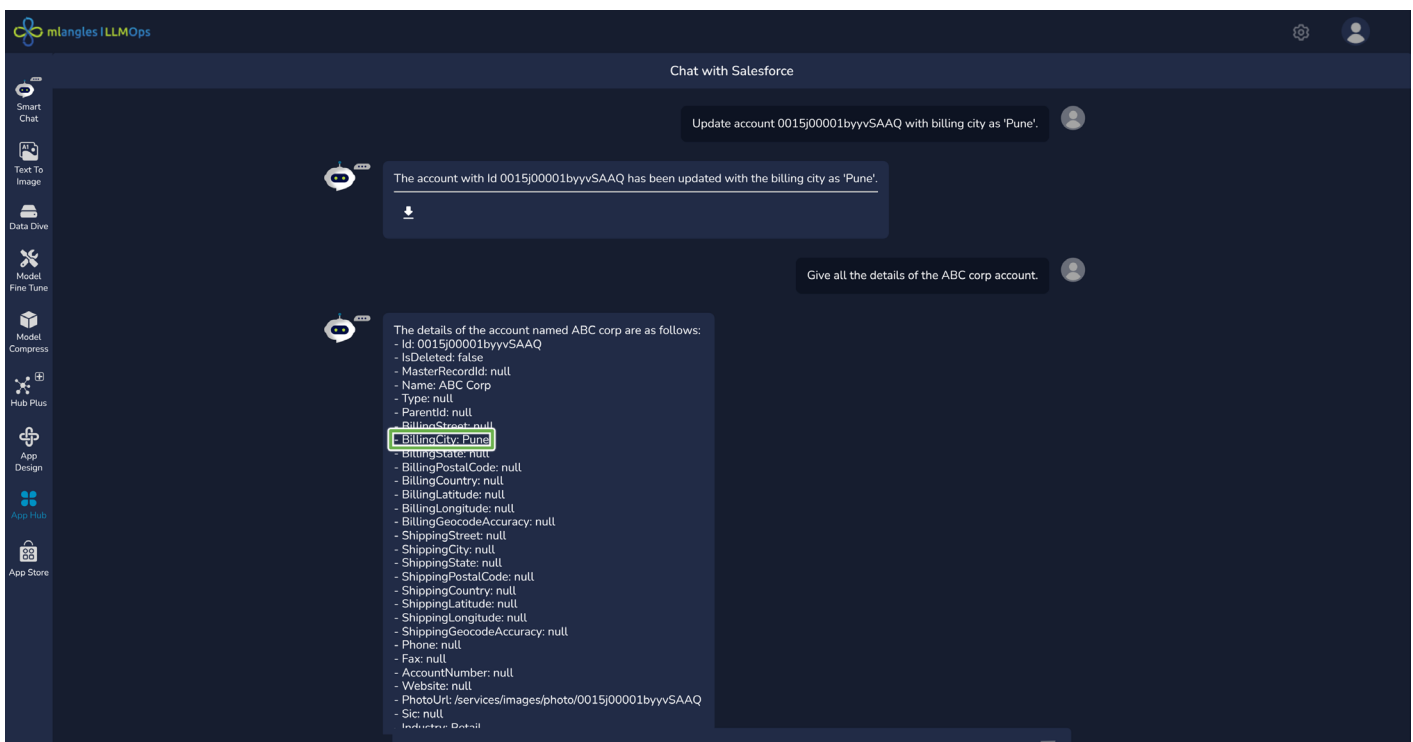
- Delete Account by Name

Query: Remove account named 'sForce'.



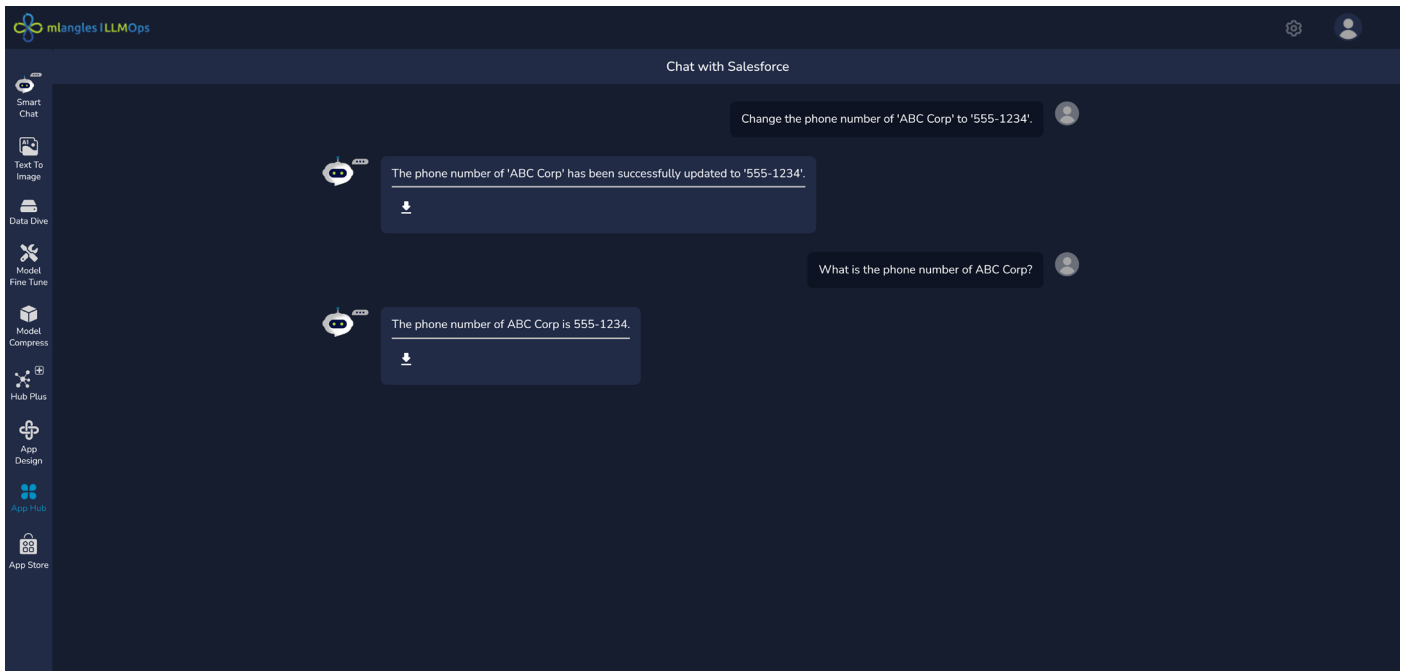
- Update Account by ID

Query: Update account 0015j00001byyvSAAQ with billing city as 'Pune'.



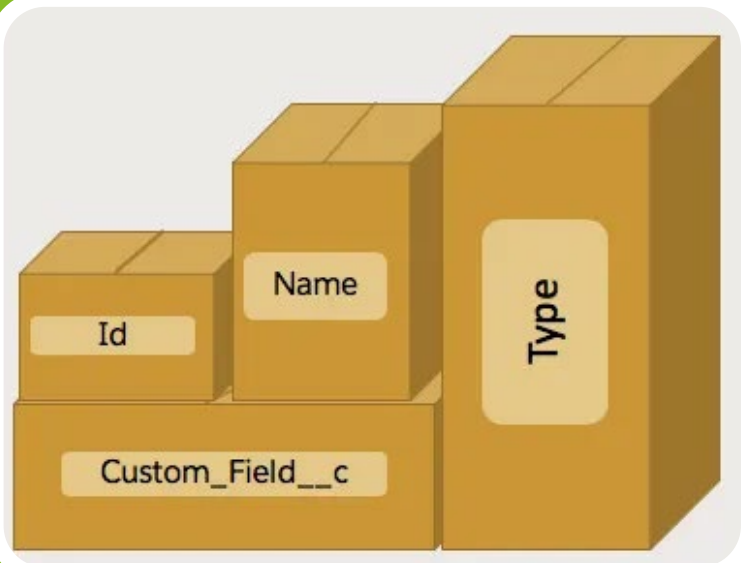
- Update Account by Name

Query: Change the phone number of 'ABC Corp' to '555-1234'.



Other SObjects:

Similar operations can be performed on Attachments, Cases, Contacts, Leads, and Opportunities using natural language commands.



How it helps enterprises?

This natural language interface for Salesforce provides several benefits for enterprises:



Improved Accessibility:

By allowing users to interact with Salesforce using natural language, the application eliminates the need for technical expertise in SOQL or navigating the Salesforce GUI. This makes Salesforce more accessible to a broader range of users within the organization.



Extensibility:

The low-code, no-code platform allows for easy integration of additional functionalities and operations based on the organization's specific requirements, future-proofing the solution.



Increased Productivity:

Users can quickly perform common operations without having to learn complex query languages or navigate through multiple screens. This streamlines workflows and improves overall productivity.



Reduced Training Costs:

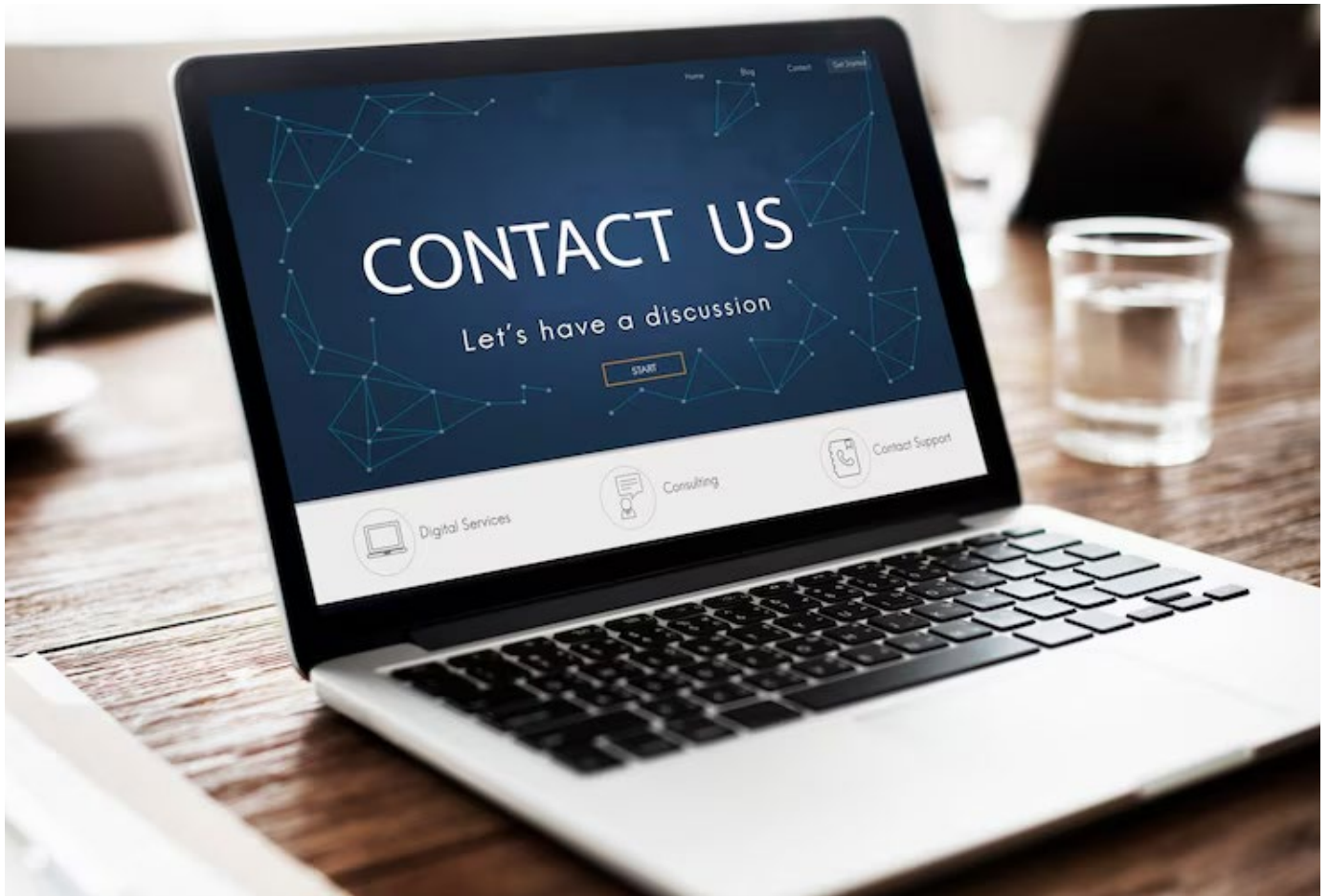
With a conversational interface, the learning curve for using Salesforce is significantly reduced, potentially lowering training costs for new employees or those transitioning to Salesforce-related roles.



Enhanced User Experience:

The natural language interface provides a more intuitive and user-friendly way of interacting with Salesforce, improving the overall user experience and potentially increasing adoption within the organization.

By leveraging this natural language interface, enterprises can empower their workforce with a more accessible and efficient way of working with Salesforce, ultimately leading to increased productivity, cost savings, and a better overall user experience.



To setup a demo email us @

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visit mlangles website

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