

QUERY AI

Installation & Configuration Manual

INTRODUCTION

Make it easier and faster to get the data you need in Salesforce with 'Query AI'. Building reports is no longer required. Query AI can handle this. All you need to do is simply enter a request in natural language - click a button and you will see the results in table format.

'Query AI' uses the power of Open AI to transform human-readable text into a SOQL query and then retrieve data using it. If you have some experience with SOQL queries, you can even write your own query or modify the query generated by Query AI and get the data by running it.

INSTALLATION

Perform the following steps:

1. Open a browser and enter the installation URL. The Salesforce Login page opens.
2. Enter your credentials and click 'Login'.
3. Select 'Install for Admin Only'.
4. Grant access to the Open AI API
5. Click 'Done'.

Install Query AI
By Synebo

Install for Admins Only Install for All Users Install for Specific Profiles...

Warning: You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install **Cancel**

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

| Website | SSL Encrypted |
|----------------|-------------------------------------|
| api.openai.com | <input checked="" type="checkbox"/> |

Yes, grant access to these third-party web sites

Continue **Cancel**

Install Query AI
By Synebo

Installation Complete!

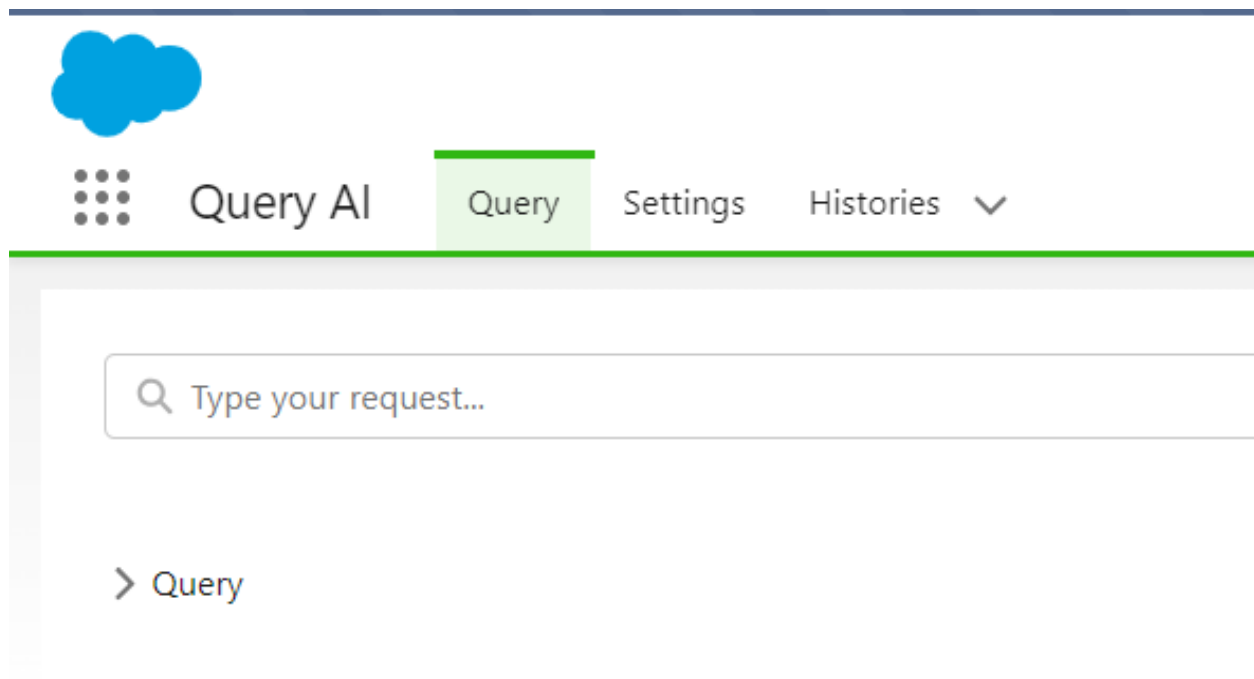
Done

The installed app can be found in Setup → Installed Packages.

QUERY AI - GETTING STARTED

Query AI package consists of **three** tabs:

- **Settings page** - contains all package configurations;
- **Query page** - provides the ability to instantly get the necessary data;
- **Histories page** - presents all data requests made previously by user.



Note: The Query AI package has two permission sets:

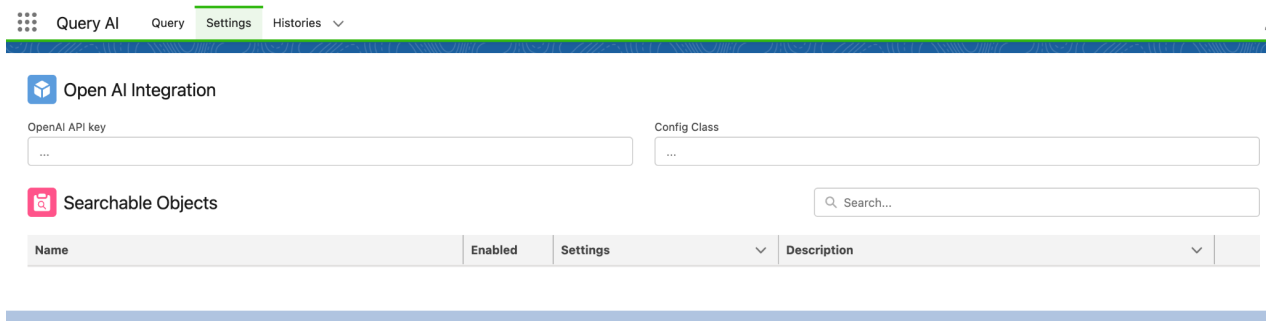
- *'Query AI Admin'* - provides access to **Settings** and **Histories** pages;
- *'Query AI User'* - provides access only to the **Query** page.

PACKAGE CONFIGURATION

All users should have an appropriate permission set assigned, to be able to start working with the Query AI package.

For users that will work with package configurations - 'Query AI Admin' permission set is required. Once it is assigned, the Query AI application becomes available with Settings and Histories tabs.

Go to App Launcher and search for Query AI. Navigate to the **Settings** tab.



The screenshot shows the 'Settings' tab for the 'Query AI' application. The navigation bar at the top includes 'Query AI', 'Query', 'Settings' (highlighted), and 'Histories' with a dropdown arrow. Below the navigation bar, there are two main sections: 'Open AI Integration' and 'Searchable Objects'. The 'Open AI Integration' section contains two input fields: 'OpenAI API key' and 'Config Class', both with ellipsis icons. The 'Searchable Objects' section features a search bar with the placeholder text 'Search...'. Below these sections is a table with the following columns: 'Name', 'Enabled', 'Settings' (with a dropdown arrow), and 'Description' (with a dropdown arrow).

| Name | Enabled | Settings | Description |
|------|---------|----------|-------------|
|------|---------|----------|-------------|

OPEN AI INTEGRATION SETTINGS

1. Enter '**OpenAI API key**'.

Note: To get this API key, log into your Open AI account following this [URL](#), choose the 'API section' → click on your personal account and select 'View Api keys' - after that Generate 'New Secret Key' and copy it for later package configuration.



Open AI Integration

OpenAI API key

2. Input name of Apex class that will be used to build proper requests to Open AI. The Query AI package has a default implementation of such class - `VStandardConfig`, but it's possible to use custom implementation.

Note: Custom config class must implement **IConfig interface** or extend **VStandardConfig** apex class.

Config Class

SEARCHABLE OBJECTS

This section stores information about Objects, Fields and Record Types that will be used by the Query AI to build a proper query and, as a result, to provide the correct data for the user's request.

1. Add an Object to the Searchable Objects table using the search field.

Config Class

Search bar: opp|

- + Opportunity (Opportunity)
- + Opportunity Contact Role (OpportunityContactRole)
- + Opportunity Feed (OpportunityFeed)
- + Opportunity Field History (OpportunityFieldHistory)
- + Opportunity History (OpportunityHistory)
- + Opportunity Partner (OpportunityPartner)

2. Open 'Object Settings pop-up' by clicking on the Object name in the table and fill into the form:
 - a. Make the toggle enabled (mandatory). Disabled 'Object setting' will not be used by Query AI.
 - b. Add Fields through the search field by pressing '+'. It's mandatory to have at least one enabled Field to be able to enable 'Object setting'.
 - c. Enter description for the Object, Fields and Record Types.

Note: All existing Object's Record Types will be added automatically.

Account Settings

Account Disabled

Description

Record Types

| Record Type | Description |
|-------------|-------------|
|-------------|-------------|

No Record Type configurations found.

Fields

| Field | Enabled | Description |
|-------|---------|-------------|
|-------|---------|-------------|

No Field configurations found.

Save

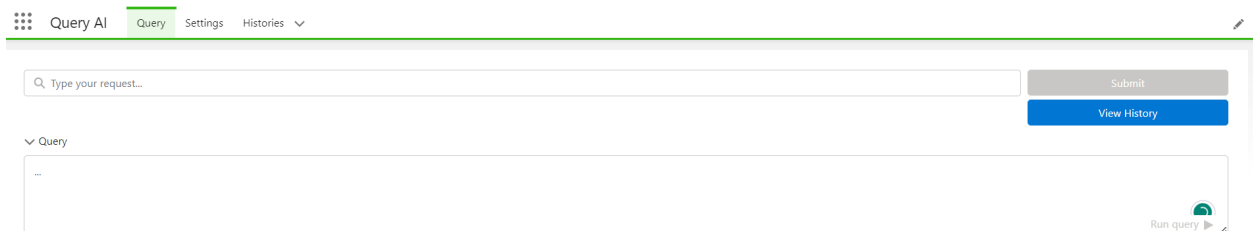
Cancel

3. Once Object settings configured Query AI package is ready for use.

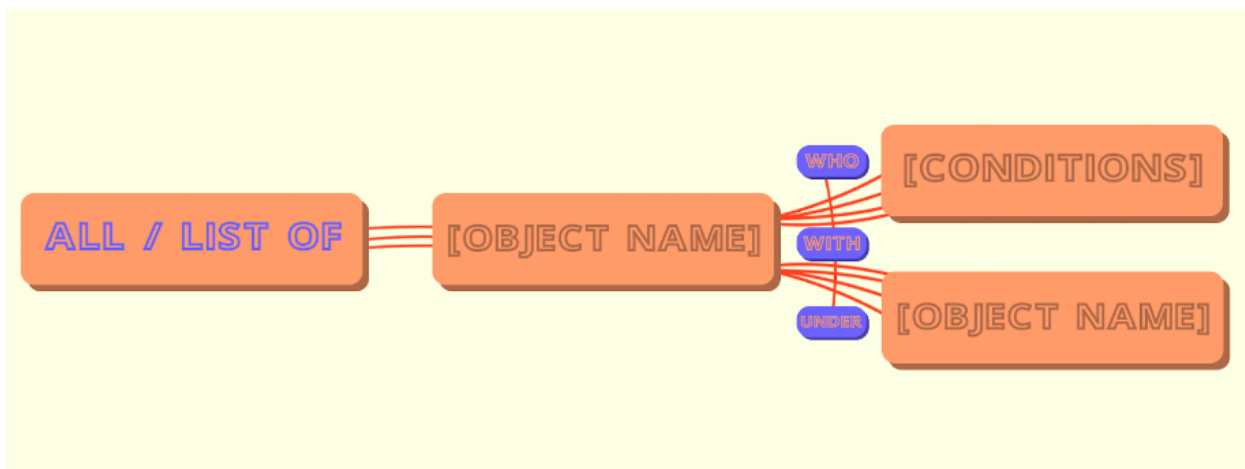
THE PROCESS OF CREATING AND MODIFYING QUERIES

After all configurations are made on the Settings Page, the System Administrator can give access to the end users through the 'Query AI User' permission set for query creation.

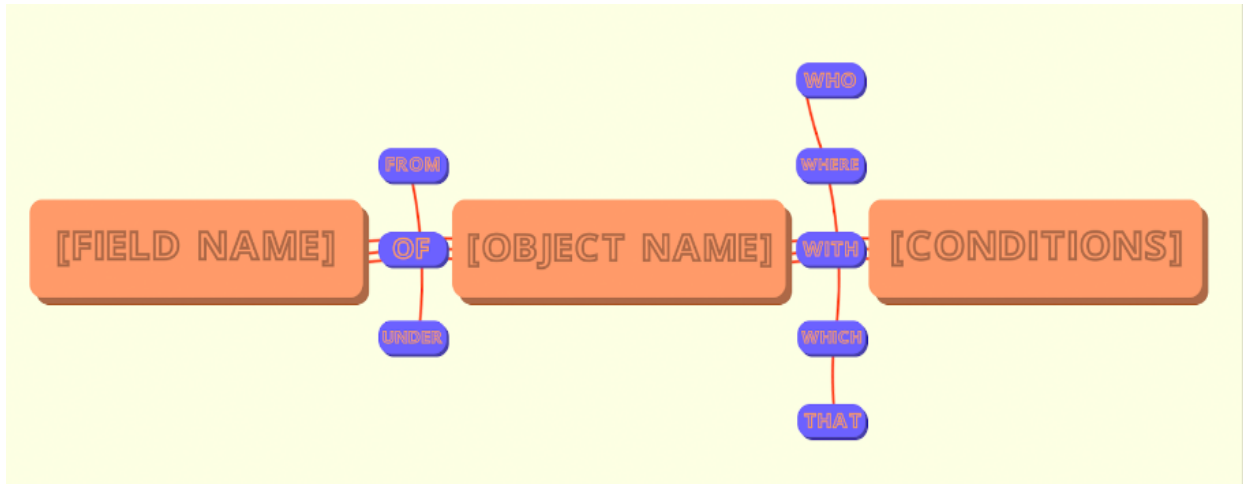
1. Go to App Launcher and search for the 'Query AI' package. The 'Query' Tab appears.
2. Input the query and press the 'Submit' button on the right side.



Note: Kindly find below two query formulas. It is recommended that you adhere to these formulas to obtain optimal results from the queries:



Example: 'All Contacts with female gender'.

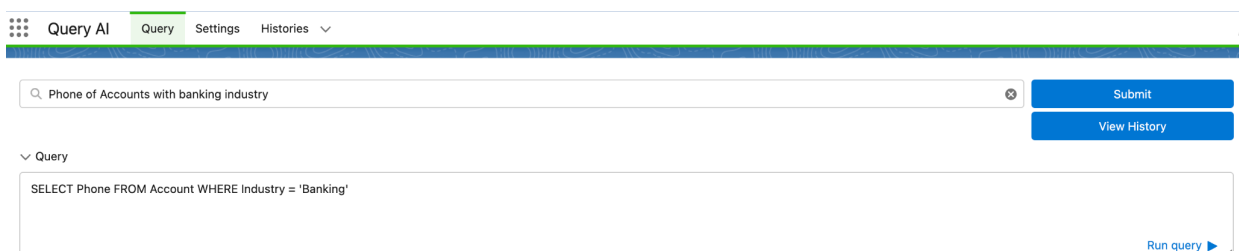


Example: 'Phone of Accounts with banking industry'.

3. Then the Result data table with the records that match the user's query will be displayed.

Note: When clicking on the record name, users will be redirected to the corresponding record page in Salesforce.

4. There is also the Query expandable section presented where users can find generated SOQL query by Open AI. This SOQL query is editable and users can modify it and run via the 'Run Query' button. In this case Open AI will not be used.



5. It is possible to reuse previous user's requests. Click on the 'View History' button to open a pop-up window with a list of submitted requests. Here users can select a query and use the 'Restore' action. After restoring, the corresponding SOQL query will appear in the expandable section and users can also edit it and 'Run Query' again.

without using additional tokens from OpenAI.

| History | | | |
|---------|-------------------|---|---|
| Date | Query | Results | |
| 1 | September 8, 2023 | Phone of Accounts with energy industry | ✓ |
| 2 | September 8, 2023 | Phone of Accounts with banking industry | ✓ |

Restore

Close

Note: History pop-up shows only the current user's requests made in the last 30 days

GENERAL RECOMMENDATIONS

Objects settings:

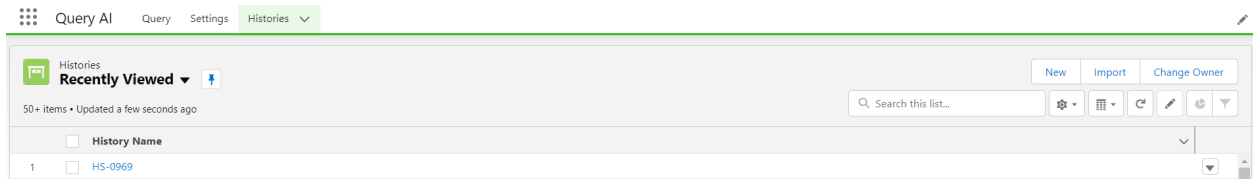
- It is important to enable only those Objects and Fields whose data will be requested by end users on the Query page. This ensures the stable work of the package and optimizes the use of Open AI tokens. Consider 5-7 Objects as the optimal number.
- For picklist fields all available options should be included in the description.
For example: 'Possible values: Value1, Value2, ...'.
- If related Objects are enabled for use by the package, it's recommended to add lookup fields that link to the Objects to the Object settings and include child relation name to the field description.

Query creating process:

- For Query where Number field type and connections 'with' / 'without' does not work correctly - in the Query condition should be used : '<>= numeric'.
- For Query with Email fields when searching by domains, the domain name must be in the format %domain_name%. If it is ignored, the package will add '.com' itself and the result may not satisfy users.

ERROR REPORTING

Query AI Admins have access to the History tab where they can find information about all requests.



If you click on any history record from the list view, you would manage next information:

1. Query submitted by user.
2. Request that was generated based on the user's query and sent to Open AI.
3. Response that OpenAI returned.
4. Query result - whether it was successful or not.

There are **3 types** of errors:

1. **External** - an error occurred while sending request to Open AI;
2. **Internal** - an error occurred while preparing request or processing request results;
3. **Query** - an error occurred while running SOQL query was returned from Open AI.

Note: Only for queries submitted to Open AI - history record will be created. Any use of 'Run Query' button will not trigger History record creation.

ADDITIONAL INFORMATION

DATA SECURITY AND PRIVACY

One of the most important aspects of using our Query AI package is keeping your organization's data secure and private. We would like to emphasize the following:

1. **Local Metadata Processing:** Our package does not transfer any data from your Salesforce environment to external servers or systems. It only processes your organization's metadata, such as fields, objects, record types.
2. **Privacy Preservation:** Your confidential data remains safe. Even when using artificial intelligence to analyze metadata, no personal or sensitive information is sent outside of your Salesforce organization.

OPEN AI POLICY

The OpenAI API is powered by a diverse set of models with different capabilities and price points. The Query AI package uses the gpt-3.5-turbo model because of its lower cost and improved performance. This model as any other has some limitations in terms of how frequently and how many tokens you can use. Please follow the links below for details:

- [What is token](#)
- [Rate limits](#)
- [Pricing](#)