

Post Installation Guide – RFP Response Assistant

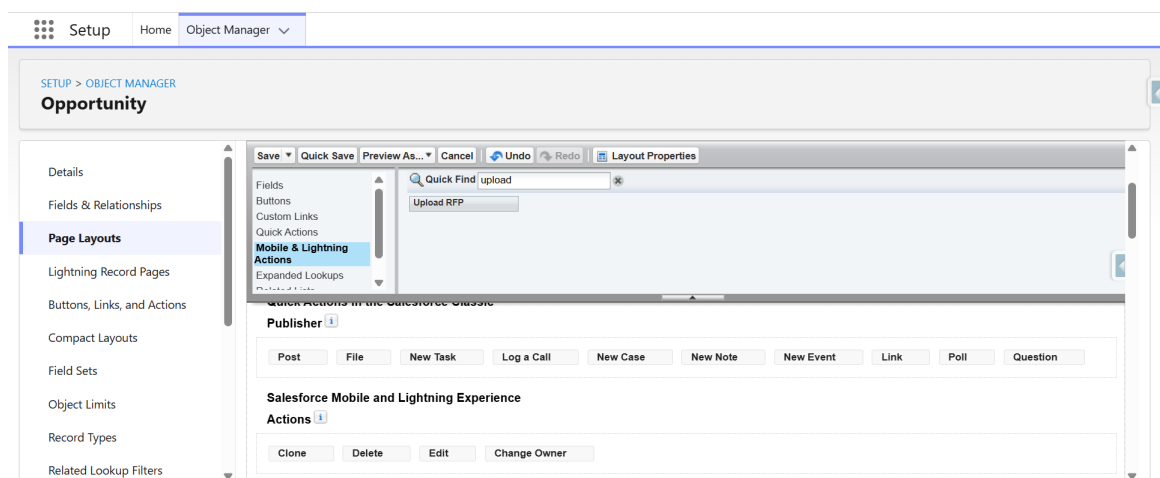
After installing the package, complete the following configuration steps in Salesforce.

1. Assign the 'RFP Response Assistant' Permission Set

1. Click the Gear (Setup) icon in the top-right corner.
2. Select Setup.
3. In the Quick Find box, type 'Permission Sets'.
4. Click Permission Sets.
5. Search for 'RFP Response Assistant'.
6. Click the permission set name.
7. Click Manage Assignments.
8. Click Add Assignments.
9. Select the users who need access.
10. Click Assign → Done

2. Add 'Upload RFP' Button to Opportunity Page Layout

1. Click the Gear icon → Setup.
2. Navigate to Object Manager.
3. Search for and select 'Opportunity'.
4. Click Page Layouts.
5. Open the layout used by your users.
6. Click Mobile & Lightning Actions.
7. In the action search box, type 'Upload RFP'.
8. Drag and drop 'Upload RFP' into the 'Salesforce Mobile and Lightning Experience Actions' section.
9. Click Save.



3. Configure Custom Metadata – RFP Response Assistant Configuration

This step connects your indexed data and query configuration to the application.

1. Click the Gear icon → Setup.
2. In the Quick Find box, type 'Custom Metadata Types'.
3. Click Custom Metadata Types.
4. Locate 'RFP Response Assistant Configuration'.
5. Click Manage Records.
6. Click New.

Basic Information

Label: RFP Response Assistant (**Do NOT change this label**).

Verify API Name: RFP_Response_Assistant

Enter Score Configuration Values

Fill in the following values:

- Highest Hybrid Matching Score: 0.90
- Lowest Hybrid Score: 0.80
- Highest Vector Score: 0.80

Add SQL Query

After your Search Index is created, it will generate:

- Index table name
- Chunk table name
- Source table name

Use those table names to construct the SQL query.

Use the below SQL and update the dlm names:

```
select
c.Chunk__c AS MatchedChunk__c,
a.Answer__c,
a.Date__c,
a.CustomerName__c,
c.SourceRecordId__c,
c.DataSource__c,
h.hybrid_score__c,
h.keyword_score__c,
h.vector_score__c
from hybrid_search(table(RFP_QA_MS_V1_index__dlm), '{{QUESTION}}', ", 3) as h
join RFP_QA_MS_V1_chunk__dlm as c
```

```

on h.SourceRecordId__c = c.RecordId__c
LEFT JOIN RFP_QA_MS_V1__dlm a
ON a.RFPID__c = c.SourceRecordId__c

```

Populate Field API Names

Ensure the following field API names are populated correctly in the metadata record:

- Question Field API Name
- Answer Field API Name
- Hybrid Score Field API Name
- Vector Score Field API Name
- RFP Field API Name
- Date Field API Name

Verify that these match the actual field API names from your indexed objects.

Click Save after completing all configurations.


SETUP

Custom Metadata Types

RFP Response Assistant Configuration
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Label	RFP Response Assistant	Protected Component	☐
RFP Response Assistant Configuration Name	RFP_Response_Assistant	Namespace Prefix	
Question Field API Name	MatchedChunk__c	Highest Hybrid Matching Score	0.90
Answer Field API Name	Answer__c	Lowest Hybrid Score	0.80
Hybrid Score Field API Name	hybrid_score__c	Highest Vector Score	0.80
Vector Score Field API Name	vector_score__c		
RFP Field API Name	CustomerName__c		
Date Field API Name	Date__c		

▼ Query

SQL Query

```

select c.Chunk__c AS MatchedChunk__c, a.Answer__c,a.Date__c,a.CustomerName__c, c.SourceRecordId__c, c.DataSource__c,h.hybrid_score__c,
h.keyword_score__c, h.vector_score__c from hybrid_search(table(RFP_QA_MS_V1_index__dlm), '{{QUESTION}}', ", ", 3) as h join
RFP_QA_MS_V1_chunk__dlm as c on h.SourceRecordId__c=c.RecordId__c LEFT JOIN RFP_QA_MS_V1__dlm a ON a.RFPID__c =
c.SourceRecordId__c

```