



Peeklogic AI Orchestrator

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Introduction

The Peeklogic AI Orchestrator allows users to seamlessly integrate AI capabilities into Salesforce via a managed package. The tool enables advanced AI usage directly from the Salesforce interface with different features like Chat Completions, Image Generation, and Moderation, etc. This documentation provides a step-by-step guide for setting up and using the application effectively.

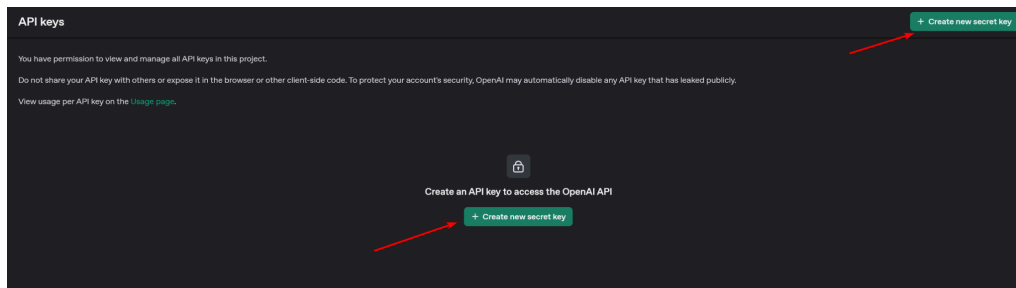
AI/Features		Text Prompt	File Input	File Output	Support History	Support Functions
Chat GPT						
	Chat Completions	✓	✗	✗	✓	✓
	Completions	✓	✗	✗	✗	✗
	Edit Images	✓	✓	✓	✗	✗
	Moderations	✓	✗	✗	✗	✗
	Image	✓	✗	✓	✗	✗
	Variants Images	✗	✓	✓	✗	✗
Gemini						
	Generate images using Imagen 3	✗	✗	✓	✗	✗
	Content Generation	✓	✓	✓	✓	✗
Chat Pdf						
	Chat	✓	✓	✗	✗	✗

Authentication Setup

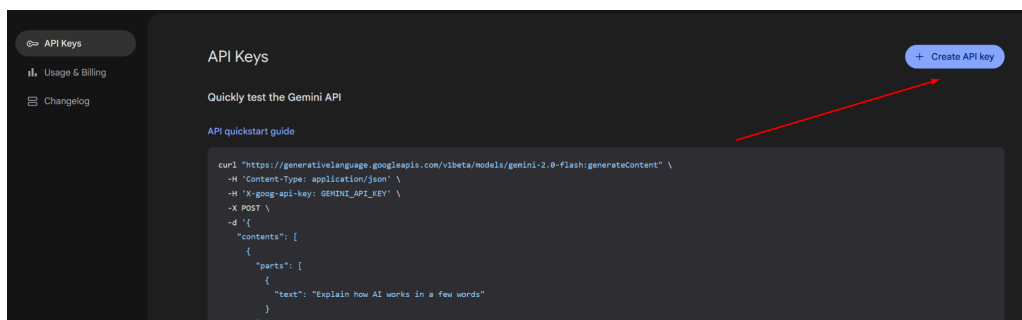
Create API Key

Here is a list of AI and links where you can create an API key.

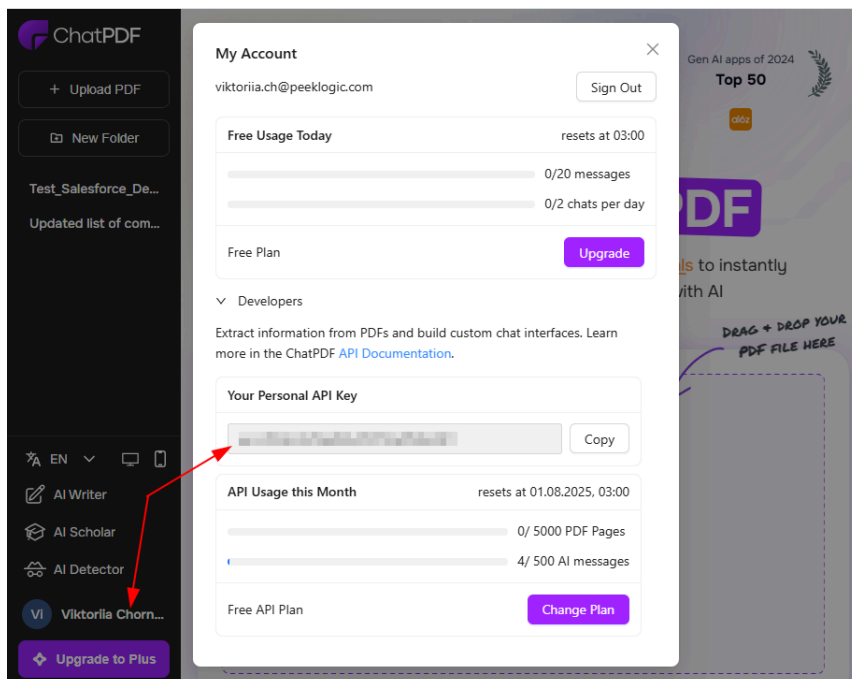
- Chat GPT - <https://platform.openai.com/api-keys>



- Gemini - <https://aistudio.google.com/app/apikey>

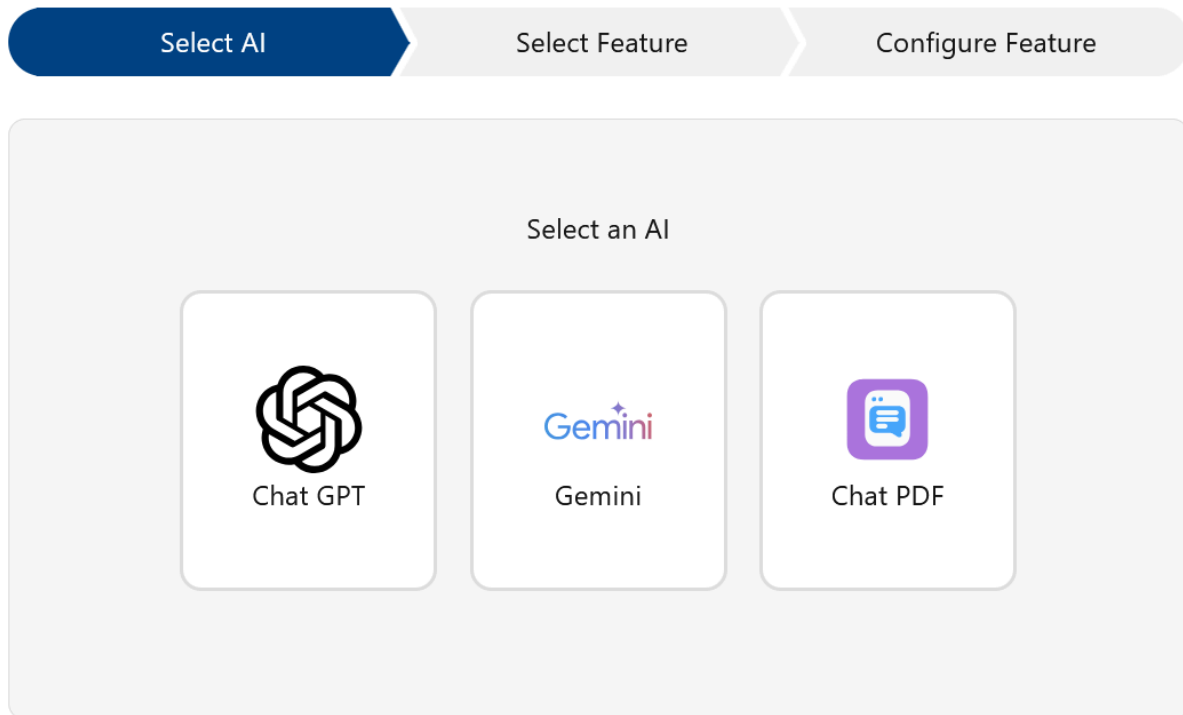


- Chat PDF - <https://www.chatpdf.com/>



Named Credentials

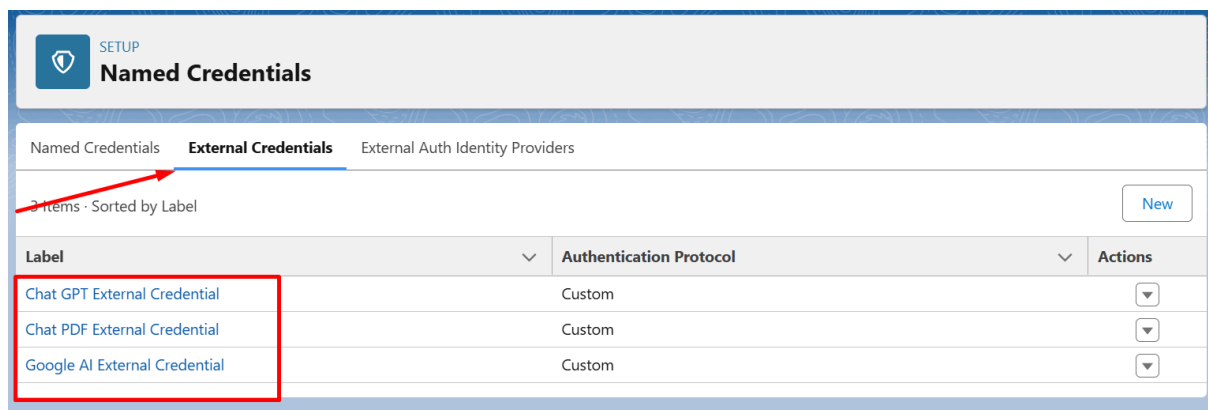
After installing the Peeklogic AI Orchestrator package, configure a Named Credential to authenticate with:



- Chat GPT
- Chat PDF
- Google AI(Gemini)
- Claude AI

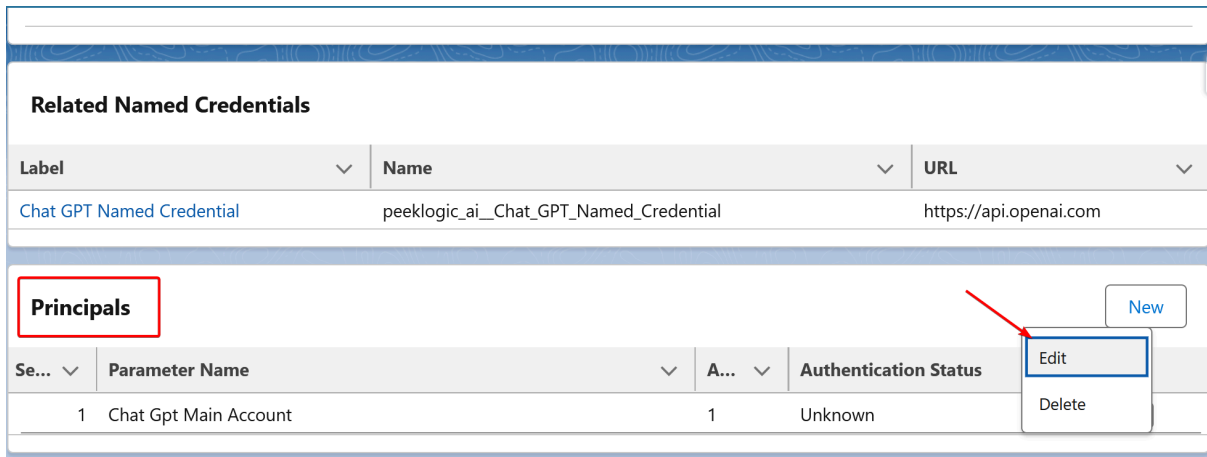
Steps:

- Navigate to **Setup** → **Named Credentials**



- Locate External Credentials and open the necessary one

- Click Edit Principal



Related Named Credentials

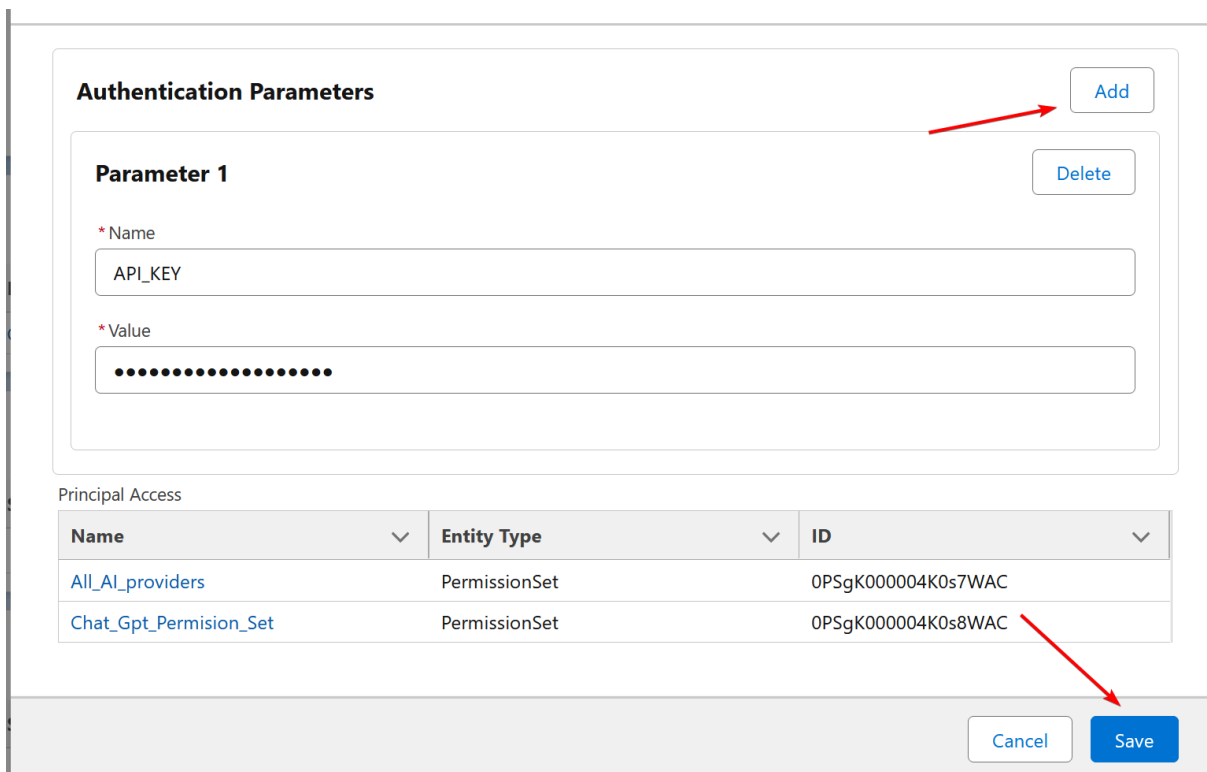
Label	Name	URL
Chat GPT Named Credential	peeklogic_ai__Chat_GPT_Named_Credential	https://api.openai.com

Principals

Se...	Parameter Name	A...	Authentication Status
1	Chat Gpt Main Account	1	Unknown

Buttons: New, Edit, Delete

- Under Authentication Parameters, enter:
 - Name: *API_KEY*
 - Value: *Paste your AI secret key*



Authentication Parameters

Parameter 1

* Name: API_KEY

* Value:

Buttons: Add, Delete

Principal Access

Name	Entity Type	ID
All_AI_providers	PermissionSet	0PSgK000004K0s7WAC
Chat_Gpt_Permission_Set	PermissionSet	0PSgK000004K0s8WAC

Buttons: Cancel, Save

- Click Save to confirm the authentication setup

This Named Credential will allow the package to communicate securely with the necessary AI API.

Assign Permission Set

To authorize users to access the Peeklogic AI Orchestrator components:

1. Go to **Setup** → **Users**

The screenshot shows the Salesforce Setup interface. On the left, the 'Users' section is expanded in the sidebar. The main content area is titled 'All Users' and contains a table of users. A red arrow points to the 'Edit' link for the user 'Buchella, Vlad'.

Action	Full Name ↑	Alias	Username
☐ Edit	Buchella, Vlad	vla	vladyslav.b791@agentforce.com
☐ Edit	Chatter Expert	Chatter	chatty.00dggk000006if7fuaq_avwzk7I0hesp@chatter.salesforce.com
☐ Edit	EPIC, OrgFarm	OEPIIC	epic.th.5eab4719cc19@orgfarm.salesforce.com
☐ Edit	User, Integration	integ	integration@00dggk000006if7fuaq.com
☐ Edit	User, Security	sec	insightssecurity@00dggk000006if7fuaq.com

2. Select the user who will use the AI features

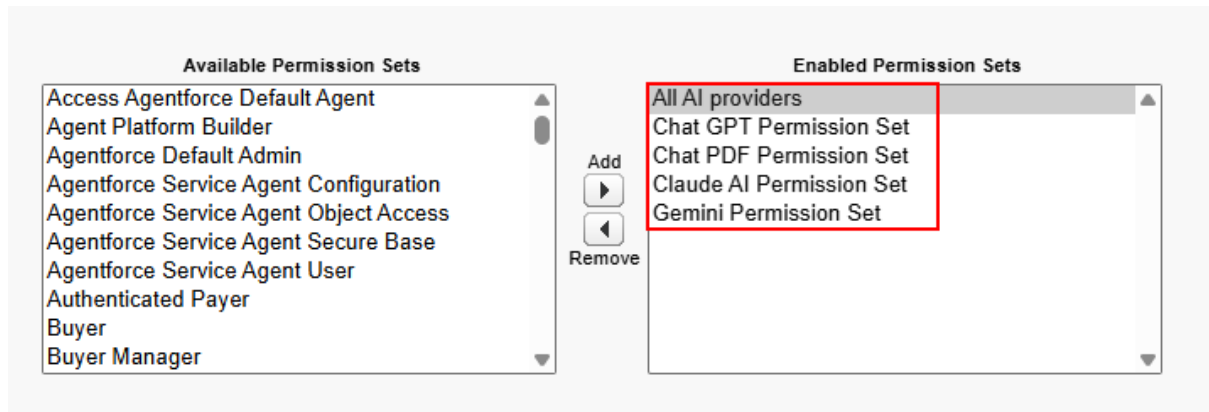
3. Under Permission **Set Assignments**, click **Edit Assignments**

The screenshot shows the 'Permission Set Assignments' page. The 'Edit Assignments' link is highlighted with a red box and a red arrow.

Action	Permission Set Name	Date Assigned	Expires On
Del	Data Cloud Admin	7/11/2025	
Del	Agentforce Default Admin	7/11/2025	
Del	Prompt Template Manager	7/11/2025	
Del	Agentforce Service Agent Configuration	7/11/2025	
Del	Service Cloud User	7/11/2025	

4. Add the necessary permission set:

- Chat GPT Permission Set
- Chat PDF Permission Set
- Gemini Permission Set(Google AI)
- Claude AI Permission Set



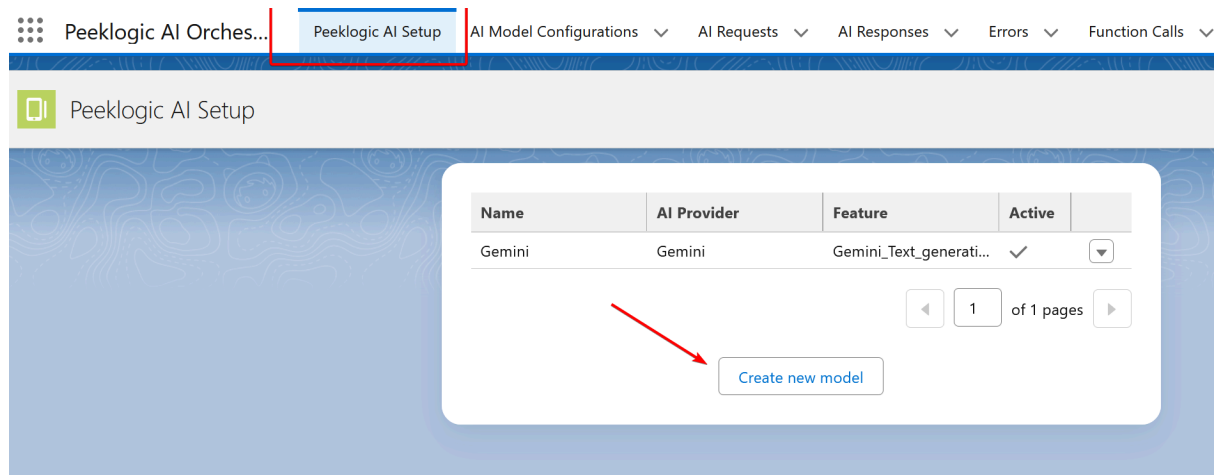
OR

- e. All AI providers permission set to provide access to all AI providers

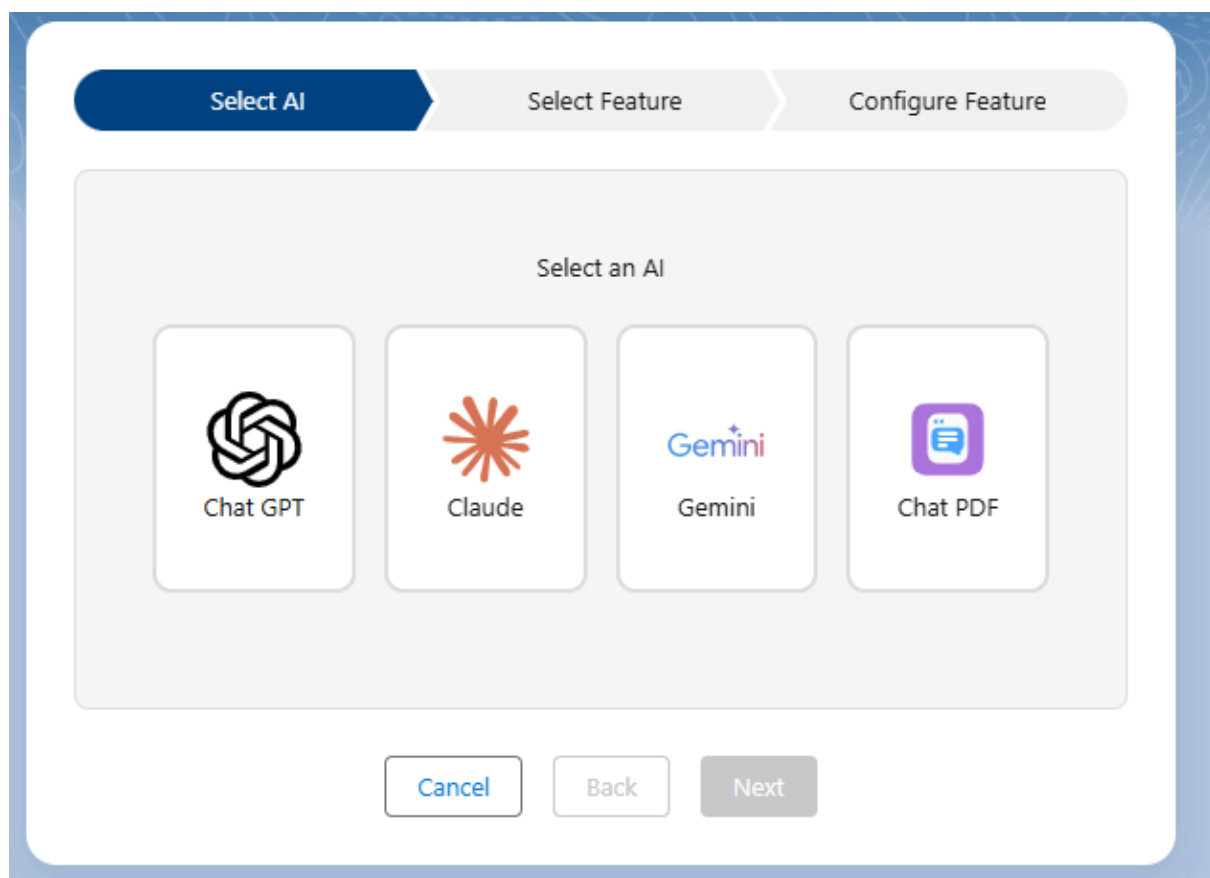
This permission set grants access to key objects like AI Requests/Responses and AI Configurations.

Feature Configuration

Go to Peeklogic AI Orchestrator and use the Peeklogic AI Setup tab to define how you would like each feature to work. You will go through a 3-step wizard:



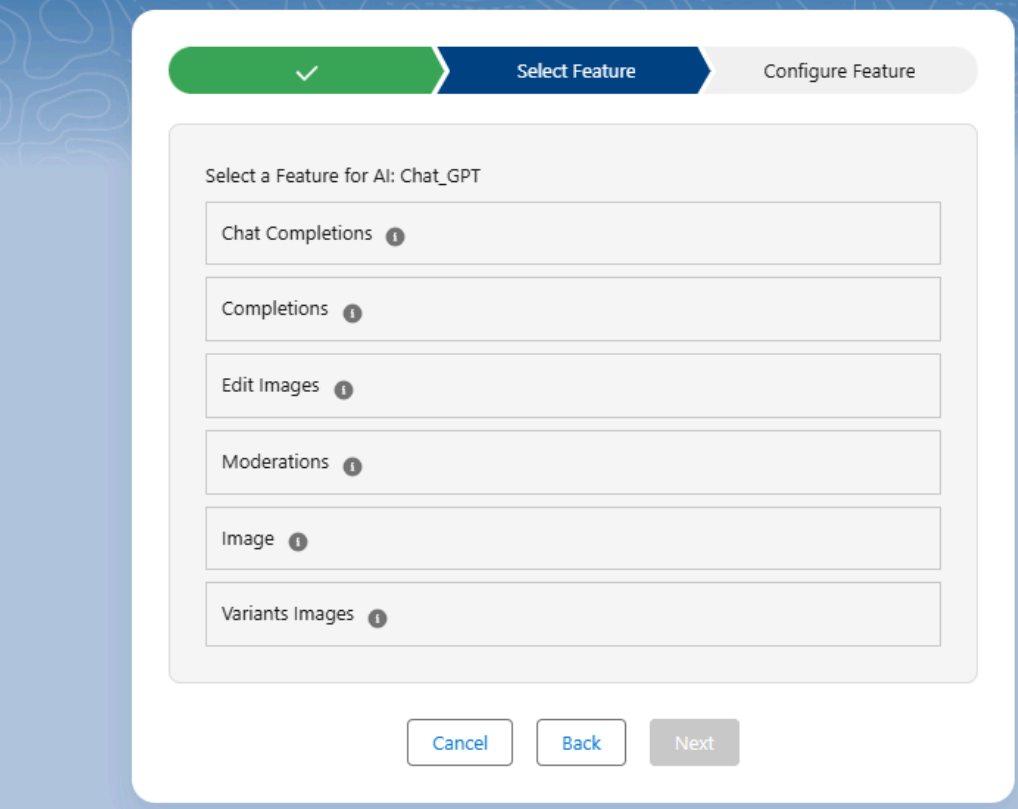
- Step 1: Select an AI provider
- Step 2: Select a feature provided by the selected AI



- Step 3: Configure that feature's parameters

Chat GPT

With ChatGPT integrated into Peeklogic AI Orchestrator, you can automate and simplify complex tasks by simply typing your request. ChatGPT generates clear, useful responses, boosting efficiency across your workflows.



The screenshot shows a configuration window for Chat GPT. At the top, there is a progress bar with three steps: a green checkmark, 'Select Feature' (highlighted in blue), and 'Configure Feature'. Below the progress bar, the text 'Select a Feature for AI: Chat_GPT' is displayed. A list of features is shown in a scrollable container: 'Chat Completions', 'Completions', 'Edit Images', 'Moderations', 'Image', and 'Variants Images'. Each feature has a small information icon (i) to its right. At the bottom of the window, there are three buttons: 'Cancel', 'Back', and 'Next'.

Chat Completions

Use for multi-turn chat interactions.

Chat GPT fields:

- **Name:** Friendly name for your config (*Required field*)
- **Frequency Penalty / Presence Penalty:** Penalize repetitions or encourage novelty
- **Max Token:** Maximum tokens for the response
- **AI Model** (*Required field*)
- **Num:** Number of completions to generate
- **Temperature:** Level of randomness in responses
- **Stop:** A stop sequence to end the response

- **Top:** Alternative to temperature for randomness control
- **User:** Pass a unique user ID

Configure Feature: Chat_Completions

* Name

Chat Completions Frequency Penalty ⓘ

Chat Completions Max Token ⓘ

* Chat Completions Model

gpt-4-turbo ▼

Chat Completions Num ⓘ

Chat Completions Presence Penalty ⓘ

Chat Completions Stop ⓘ

Chat Completions Temperature ⓘ

Chat Completions Top ⓘ

Chat Completions User ⓘ

Cancel

Back

Submit

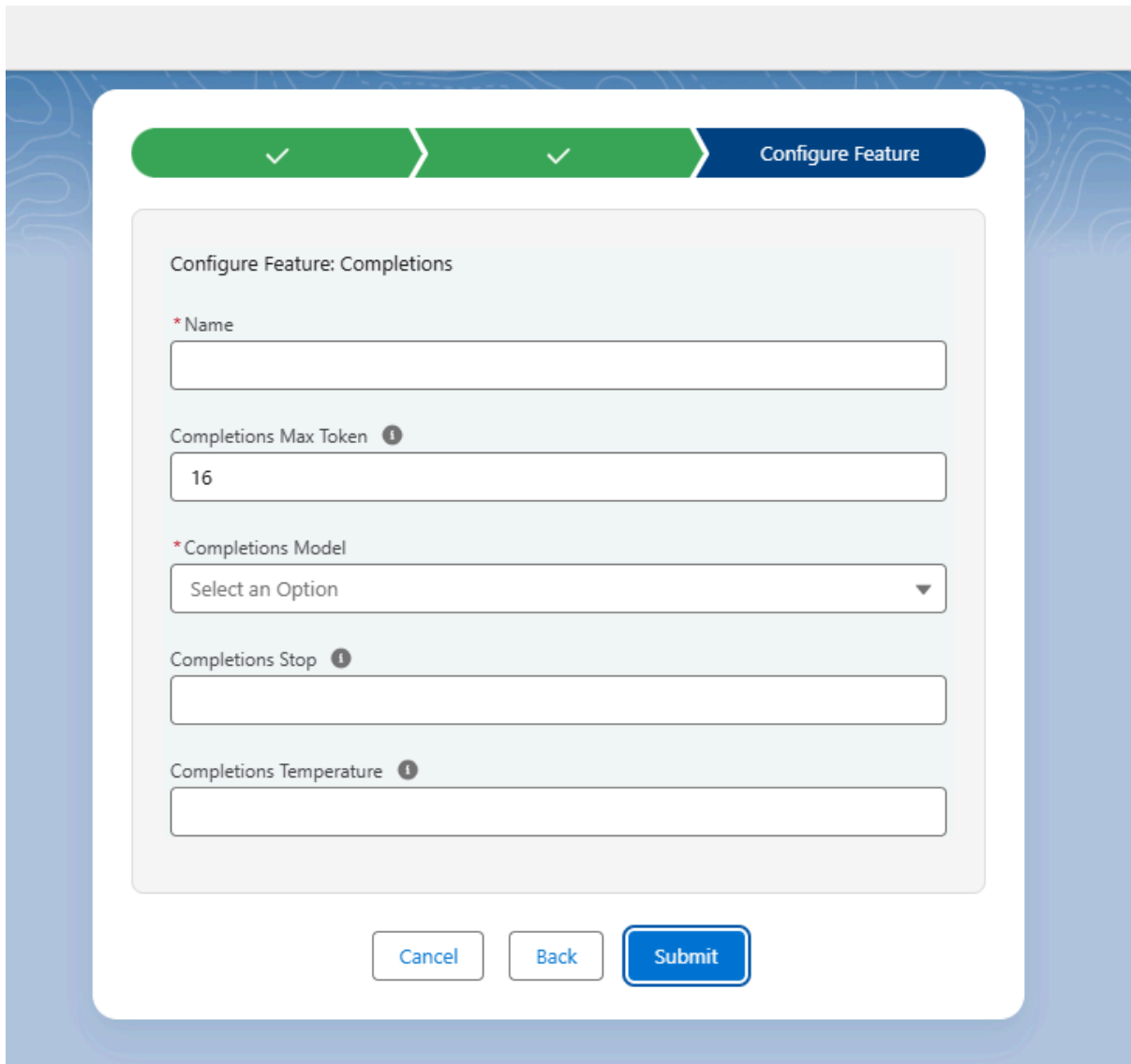
Completions

Use for basic, single-prompt completions

Chat GPT fields:

- **Name** (*Required field*)
- **Max Token:** Maximum number of tokens in response (*Required field*)
- **Model:** Select from text models (*Required field*)

- **Stop:** Tokens to stop response generation
- **Temperature:** Controls response creativity



The image shows a 'Configure Feature' dialog box with a green progress bar at the top containing two checkmarks. The title of the dialog is 'Configure Feature: Completions'. It contains several input fields: a required 'Name' field, a 'Completions Max Token' field with an information icon and the value '16', a 'Completions Model' dropdown menu with 'Select an Option' and a downward arrow, a 'Completions Stop' field with an information icon, and a 'Completions Temperature' field with an information icon. At the bottom are three buttons: 'Cancel', 'Back', and 'Submit'.

Edit Images

Allows editing parts of an image based on a prompt.

Chat GPT fields:

- **Name** (*Required field*)
- **Image Edit Model:** The model to use for image generation. (*Only dall-e-2 is supported at this time.*) (*Required field*)

- **Num:** The number of images to generate. (*Must be between 1 and 10.*)
- **Format:** Select how the edited image will be returned:

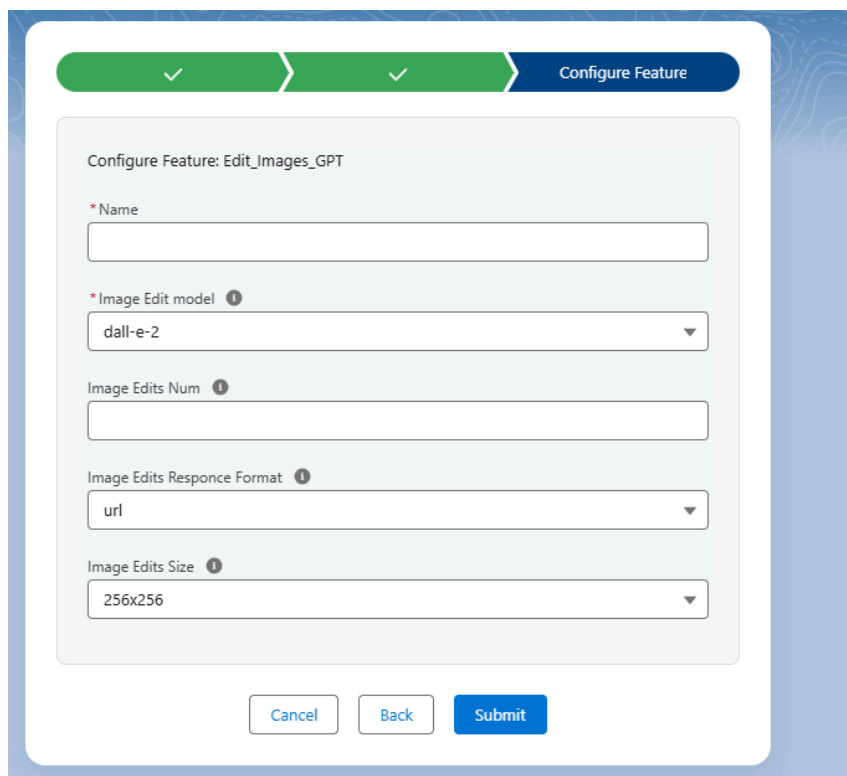
url – Returns a temporary link to the edited image. The link is valid for 1 hour only and then expires automatically. This option does not consume Salesforce storage.

b64_json – Returns the image encoded in Base64. This image is then saved as a Salesforce file, which consumes storage space in your Salesforce org.

Note: Use *url* when you just need a preview or temporary use.

Use *b64_json* if you need to store the image permanently in Salesforce.

- **Size:** Image size (256x256, 512x512, 1024x1024)



The screenshot shows a 'Configure Feature' dialog box for the feature 'Edit_Images_GPT'. The dialog has a title bar with two green checkmarks and a 'Configure Feature' button. The main content area contains the following fields:

- * Name:** A text input field.
- * Image Edit model:** A dropdown menu with 'dall-e-2' selected.
- Image Edits Num:** A text input field.
- Image Edits Response Format:** A dropdown menu with 'url' selected.
- Image Edits Size:** A dropdown menu with '256x256' selected.

At the bottom of the dialog are three buttons: 'Cancel', 'Back', and 'Submit'.

Images

Use this to generate new images based on a prompt.

Chat GPT fields:

- **Name** (*Required field*)
- **Image Completions Model** (*Required field*)
- **Num:** Number of images to generate
- **Format:** Select how the edited image will be returned:

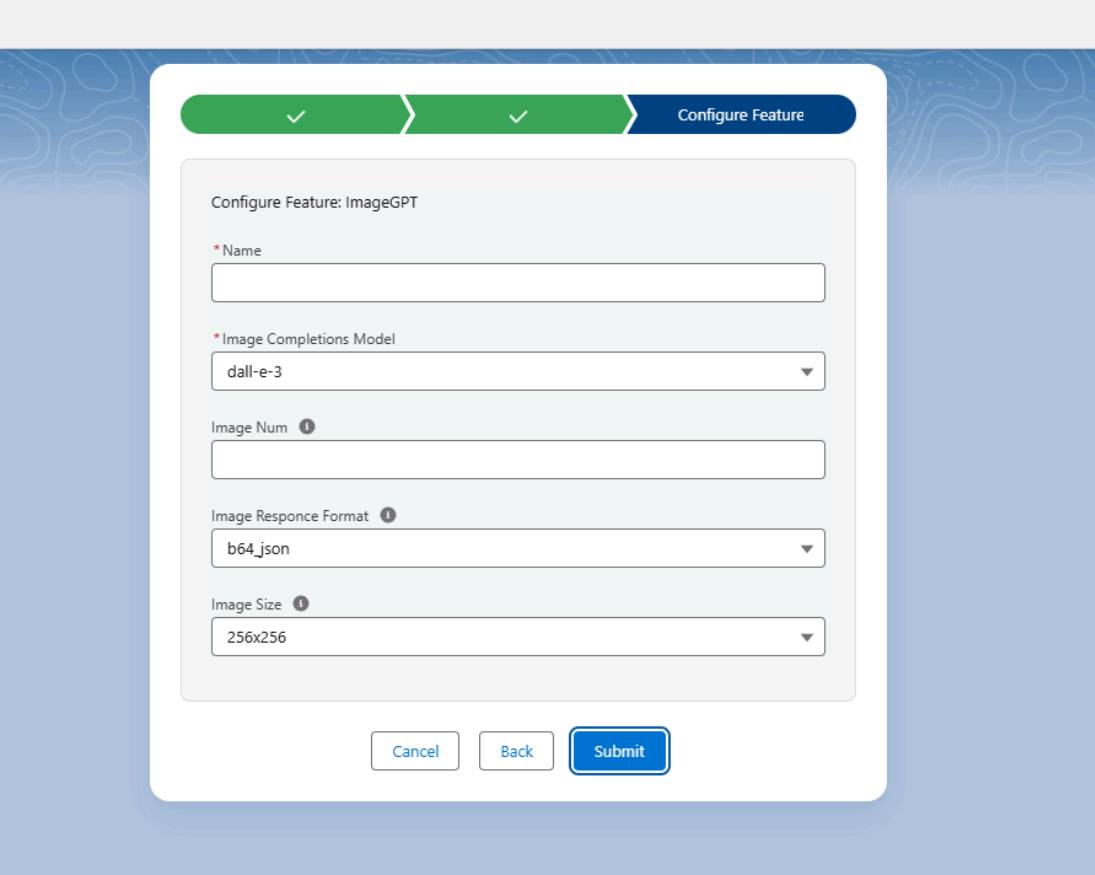
url – Returns a temporary link to the edited image. The link is valid for 1 hour only and then expires automatically. This option does not consume Salesforce storage.

b64_json – Returns the image encoded in Base64. This image is then saved as a Salesforce file, which consumes storage space in your Salesforce org.

Note: Use *url* when you just need a preview or temporary use.

Use *b64_json* if you need to store the image permanently in Salesforce.

- **Size:** Choose from multiple resolutions (256x256 up to 1792x1024)



Configure Feature: ImageGPT

* Name

* Image Completions Model

Image Num ⓘ

Image Response Format ⓘ

Image Size ⓘ

Cancel Back Submit

Image Variants

Generate variations of an input image.

Required fields:

- **Name** (*Required field*)
- **Format:** Select how the edited image will be returned:
 - **url** – Returns a temporary link to the edited image. The link is valid for 1 hour only and then expires automatically. This option does not consume Salesforce storage.

- **b64_json** – Returns the image encoded in Base64. This image is then saved as a Salesforce file, which consumes storage space in your Salesforce org.

Note: Use *url* when you just need a preview or temporary use.

Use *b64_json* if you need to store the image permanently in Salesforce.

- Model (*Required field*)
- Num: Number of variations to generate
- Size: Choose resolution
- User: Provide identifier for traceability

The screenshot shows a 'Configure Feature' dialog box for the feature 'Variants_Images_GPT'. The dialog has a progress bar at the top with two green steps and a blue 'Configure Feature' button. The form contains the following fields:

- *Name**: A text input field.
- Image Variations Format**: A dropdown menu with 'b64_json' selected.
- *Image Variations Model**: A dropdown menu with 'Select an Option' selected.
- Image Variations Num**: A text input field.
- Image Variations Size**: A dropdown menu with '256x256' selected.
- Image Variations User**: A text input field.

At the bottom of the dialog are three buttons: 'Cancel', 'Back', and 'Submit'.

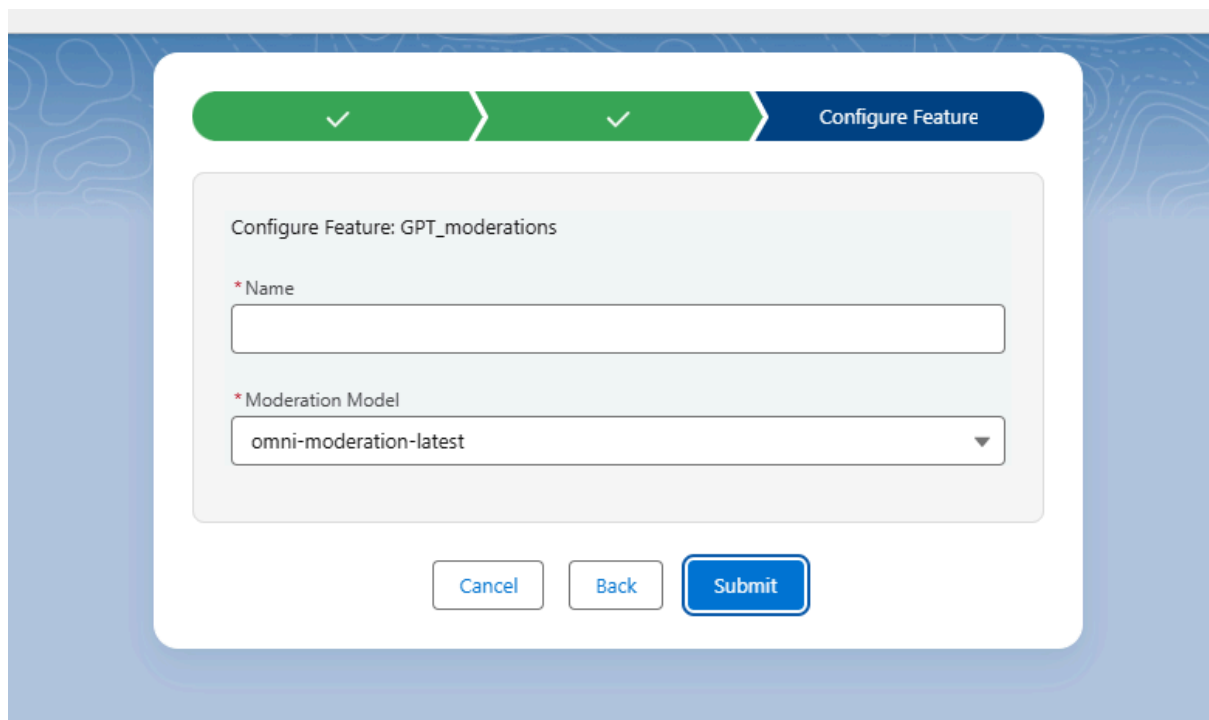
Moderation

Scan prompts or responses for inappropriate or harmful content.

Required fields:

- Name
- Moderation Model: choose omni-moderation-latest

Click Submit to save the configuration. It will now appear in the main Peeklogic AI Setup list.



The screenshot shows a 'Configure Feature' dialog box for 'GPT_moderations'. At the top, there is a progress bar with two green segments containing checkmarks and a final blue segment labeled 'Configure Feature'. The dialog title is 'Configure Feature: GPT_moderations'. It contains two required fields: a text input for 'Name' and a dropdown menu for 'Moderation Model' which is currently set to 'omni-moderation-latest'. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Submit'.

Configure Feature: GPT_moderations

* Name

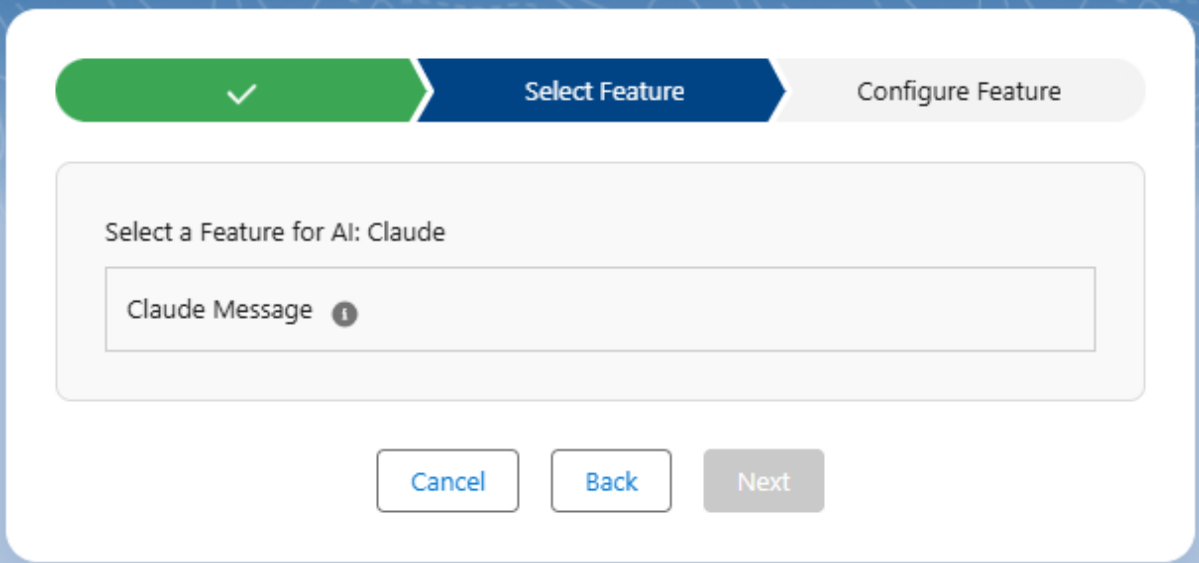
* Moderation Model

omni-moderation-latest

Cancel Back Submit

Claude

Peeklogic AI Orchestrator's Claude integration empowers your Salesforce workflows with advanced natural language understanding. Simply enter questions or instructions in plain language, and Claude will generate helpful answers, summaries, or decisions based on your data. This integration is ideal for dynamic content generation, automated support, and AI-powered productivity directly within your Salesforce environment.



The screenshot shows a three-step progress bar at the top: a green step with a checkmark, a blue step labeled 'Select Feature', and a grey step labeled 'Configure Feature'. Below the progress bar, the text 'Select a Feature for AI: Claude' is displayed. A search bar contains the text 'Claude Message' followed by an information icon. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Next'.

Claude Message

Claude Message uses Claude by Anthropic to generate smart responses and automate tasks in Salesforce.

Required fields:

- Name
- Claude Max Tokens
- Claude Model

Optional fields:

- Claude Temperature: Controls how creative or predictable the AI response is
- Claude Top: Filters tokens by cumulative probability; fine-tunes randomness
- Claude topK: Limits response to the top K most likely tokens



Configure Feature

Configure Feature: Claude_Message

* Name

* Claude Max Tokens 

* Claude Model

Claude Temperature 

Claude Top 

Claude topK

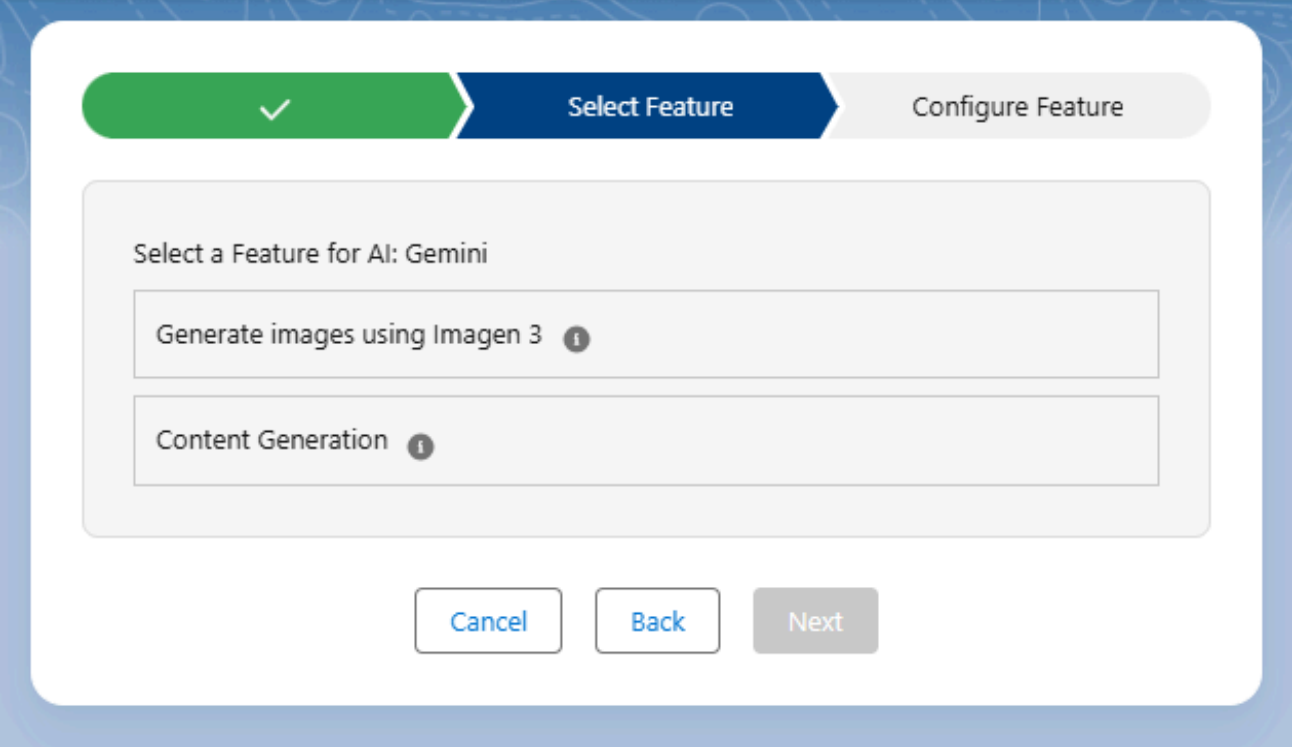
Cancel

Back

Submit

Gemini

Peeklogic AI Orchestrator's Gemini integration makes it easy to interact with your data and workflows. Enter natural language queries and let Gemini generate insights, summaries, and guidance to help you work faster and smarter.



The screenshot shows a configuration window for the Gemini integration. At the top, there is a progress bar with three steps: a green step with a checkmark, a blue step labeled 'Select Feature', and a grey step labeled 'Configure Feature'. Below the progress bar, the text 'Select a Feature for AI: Gemini' is displayed. Underneath, there are two selectable options: 'Generate images using Imagen 3' and 'Content Generation'. Each option has a small information icon (i) to its right. At the bottom of the window, there are three buttons: 'Cancel', 'Back', and 'Next'.

Generate images using Imagen 3

Generates images from text prompts.

Gemini fields:

- Name
- Aspect Ratio
- Sample Count: The number of images to generate
- Person Generation: Allow the model to generate images of people

Configure Feature: Gemini_Text_Imagen

* Name

{ } parameters

Aspect Ratio ⓘ

--NON--

{ } parameters

Sample Count ⓘ

1

{ } parameters

Person Generation ⓘ

--NON--

Cancel Back Submit

Content Generation

Generates text content from prompts using Gemini AI.

Gemini fields:

- Name
- Model - Default: Gemini 2.5 Pro

Note: The Model list contains all possible models that were earlier Gemini. Google has not removed them. Therefore, some of them do not work because they are no longer supported.

- maxOutputTokens: The maximum number of tokens in the response.
- stopSequences: Sequences that stop generation.
- Temperature: The randomness of the model's responses.

- topK: The number of tokens to consider for sampling.
- topP: The cumulative probability of tokens for sampling.
- Gemini_Text_safetySettings
 - category: Defines the type of potentially harmful content to be filtered. Examples include: "Harassment," "Hate speech," "Sexually explicit," and "Dangerous content."
 - threshold: Sets how strict the filtering should be for each category. For instance, you can set a threshold to block only content with a high probability of being harmful, or you can be more strict and block content even with a low probability.

Configure Feature: Gemini_Text_generation

* Name

* Model ⓘ

Gemini 2.5 Pro ▼

{ } generationConf...

maxOutputTokens ⓘ

{ } generationConf...

stopSequences ⓘ

{ } generationConf...

Temperature ⓘ

{ } generationConf...

topK ⓘ

{ } generationConf...

topP ⓘ

> Gemini_...

[0] ×

* category ⓘ

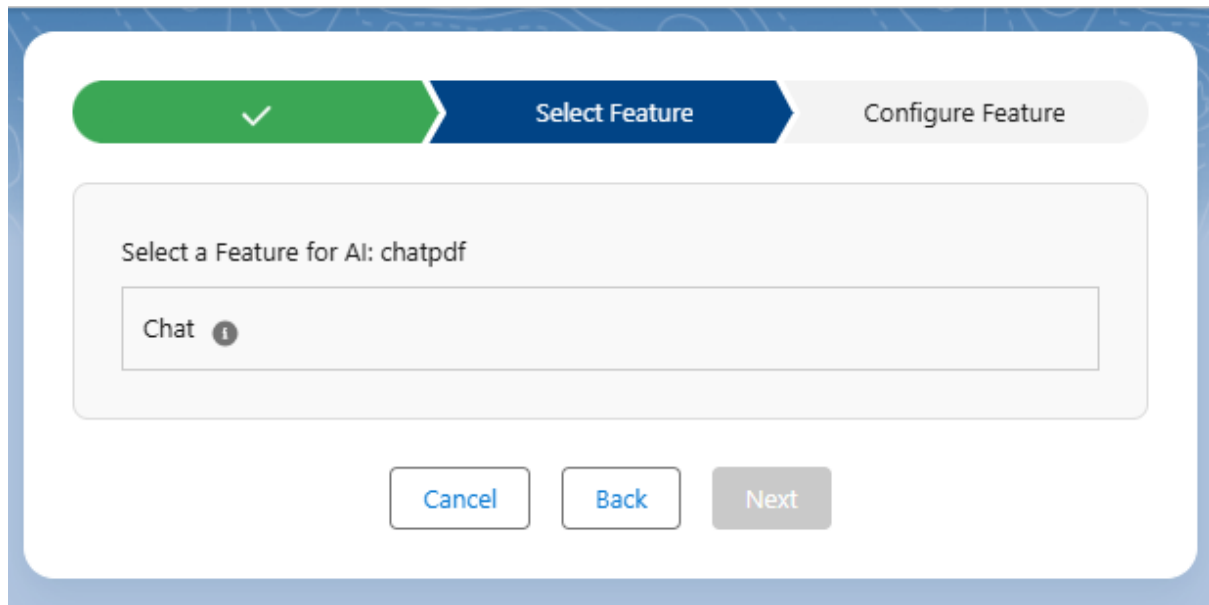
Select an Option ▼

* threshold ⓘ

Select an Option ▼

Chat PDF

Peeklogic AI Orchestrator's Chat PDF integration makes it easy to analyze and interact with your PDF documents. Enter your query, and Chat PDF retrieves key information, summaries, or insights in seconds.



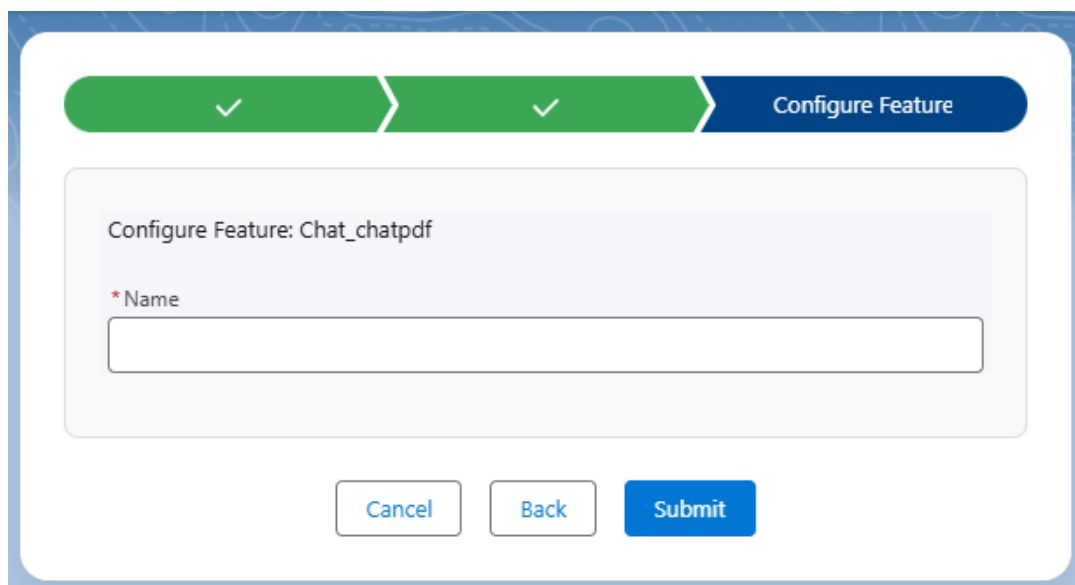
The screenshot shows a three-step progress bar at the top: a green step with a checkmark, a blue step labeled 'Select Feature' (which is the current step), and a grey step labeled 'Configure Feature'. Below the progress bar, the text 'Select a Feature for AI: chatpdf' is displayed. A search bar contains the text 'Chat' followed by an information icon. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Next'.

Chat

Allows you to programmatically extract information from PDF files and create custom chatbots based on your PDFs.

Required fields:

- Name



The screenshot shows a three-step progress bar at the top: two green steps with checkmarks and a blue step labeled 'Configure Feature' (which is the current step). Below the progress bar, the text 'Configure Feature: Chat_chatpdf' is displayed. A required field is shown with the label '* Name' and an empty text input box. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Submit'.

Creating & Managing AI Model Configurations

Every configuration is saved in the AI Model Configurations tab. From there, you can:

- View and edit parameters
- Track feature type (Chat Completions, Edit Images, etc.)
- Deactivate a model if no longer needed
- Create request via Peeklogic AI Request tab

Each record shows which AI provider and model are in use.

Making AI Requests and Viewing Responses

Using the AI Model Configuration record

You can test your configuration from the related tab:

1. Go to AI Model Configurations and select a record
2. Click on Peeklogic AI Request tab
3. Populate the necessary parameter according to AI provider and model, example:
 - Add a message with the role system
 - Add a message with the role user and enter your prompt(content)
 - Upload file
4. Click Make Request

The system sends the payload to AI and returns a response.

- The answer is displayed below in a response bubble

Peeklogic AI Orches... Peeklogic AI Setup AI Model Configurations AI Requests AI Responses Errors Function Calls

AI Model Configuration Gemini Content New Contact Edit New Opportunity

Related Details **Peeklogic AI Request** Make Request

*Salesforce Record/s Models
Viktoria Chornenka Chat GPT

Activate History inactive

* Chat Completions Messages Role System
* Chat Completions messages content You are a helpful assistant.
* Chat Completions Messages Role User
* Chat Completions messages content Tell me about the benefits of exercise

Exercise offers a multitude of benefits for both physical and mental health. Here are some of the key advantages: ### Physical Health Benefits 1. "Improves Cardiovascular Health" Regular physical activity strengthens the heart muscle, lowers blood pressure, improves blood flow, and increases heart function. 2. "Controls Weight" Exercise is crucial in controlling weight by burning calories and boosting metabolism. 3. "Strengthens Muscles and Bones" Activities such as weightlifting improve muscle strength and endurance, while weight-bearing exercises like running, walking, and yoga can strengthen bones, decreasing the risk of conditions such as osteoporosis. 4. "Enhances Flexibility and Balance" Regular movement maintains body flexibility and helps improve balance, reducing the risk of falls, especially in older adults. 5. "Boosts Immunity" Moderate intensity exercises can boost the immune system by improving circulation, helping the body fight off illnesses. ### Mental Health Benefits 1. "Reduces Symptoms of Depression and Anxiety" Physical activity releases endorphins, known as 'feel-good' hormones, which can lighten moods and reduce symptoms of depression and anxiety. 2. "Improves Sleep" Regular exercise can help you fall asleep faster and deepen your sleep, just as long as you don't exercise too close to bedtime. 3. "Increases Self-Esteem and Confidence" Meeting exercise goals or challenges, even small ones, can increase self-confidence and self-esteem. 4. "Enhances Brain Health" Exercise improves brain function and protects memory and thinking skills, indirectly by improving mood and sleep and reducing anxiety and stress. ### Other Benefits 1. "Social Interaction" Joining a gym, attending a group fitness class, or playing a team sport can help increase social interaction and develop new friendships. 2. "Increased Longevity" Regular physical activity is associated with a longer lifespan as it reduces the risk of dying from leading causes of death, like heart disease and cancer. 3. "Management of Chronic Diseases" Exercise helps manage various chronic health conditions such as diabetes, arthritis, and heart disease, often reducing the need for medication. Overall, integrating regular exercise into your daily routine can significantly enhance your quality of life, offering long-term health benefits and improving your ability to enjoy daily activities.

Activate History

Some AI models also have a history. For example, GPT and Gemini.

To enable it, switch the toggle switch in the Activate History field to the active state.



AI Record Component

Requests => Response

New Requests

[Make Request](#)

* Salesforce Record/s

Vlad Buchella

Models



Gemini



Activate History



Active

* Parent Response Element

Select an Record/s



* Text



You are a helpful assistant.

Role



model



* Text



text

Role



user



After that, you can submit a request for what you need to remember. And click on *"Make Request"*



AI Record Component

Requests => Response

New Requests

[Make Request](#)

*Salesforce Record/s

Vlad Buchella

Models



Gemini

Activate History



Active

* Parent Response Element

Select an Record/s



* Text



You are a helpful assistant.

Role



model

* Text



Remember this Phone -> 07799556622

Role



user

After a while, the AI will send us a response saying that it has remembered this. So if we try to ask it about what we asked it to remember, it will give us an answer.



Okay, I will remember the phone number ****07799556622**** for the rest of our current conversation. Please keep in mind that I will forget this information once our chat ends. Just let me know when you need me to recall it.



Of course. The phone number you asked me to remember is: ****07799556622****

You can see all requests and responses in this tab. You can also open them to see detailed information.



AI Record Component

Requests => Response

New Requests

Requests

☒ REQ-0002 ✓

History (7)

model

You are a helpful assistant.

user

Save this Phone -> 07799556622

model

As an AI, I don't have a personal contact list or the abilit...

user

rememver this Phone -> 07799556622

model

Okay, I will remember the phone number **077995566...

user

Provide me phone which i send you

Responses (1)

RSP-0002

Of course. The phone number you asked me to remem...

Viewing Request History

Go to the AI Requests tab:

- Shows all prompts and metadata per request

Go to the AI Responses tab:



AI Requests

Recently Viewed

▼



3 items • Updated a few seconds ago

	☐	AI Request Name
1	☐	REQ-0002
2	☐	REQ-0001
3	☐	REQ-0000

- Shows full response body and returned data
- You can click into each request to view the related model configuration, timestamp, and raw JSON



AI Responses

All ▾



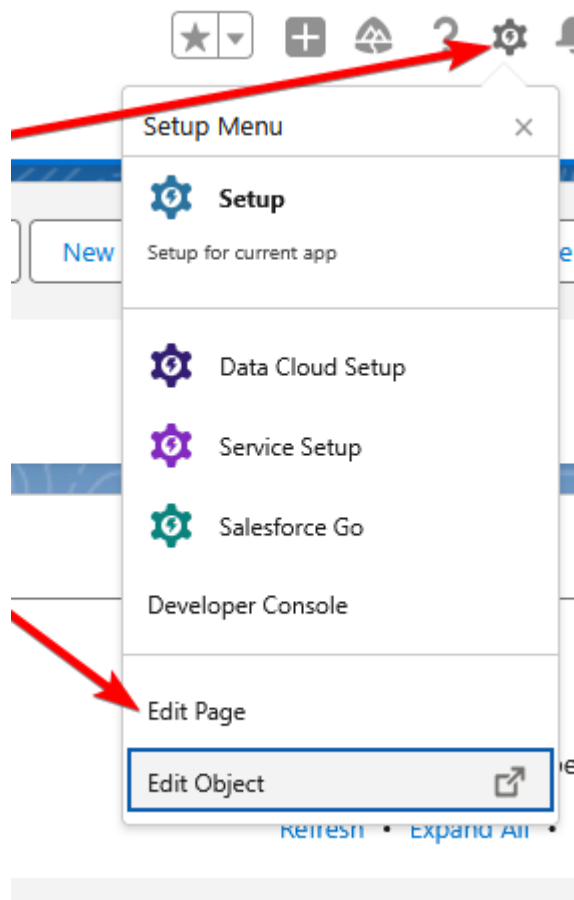
3 items • Sorted by AIResponse Name • Updated a few seconds ago

☐				Response ▾	Response Body	
1	☐	RSP...	☒	☐	As an AI, I don't have a personal contact list o...	{"responseId":"6Sd-aj_fm7y9_uMPjZqX2AI","modelVersion"
2	☐	RSP...	☒	☐	Okay, I will remember the phone number **0...	{"responseId":"lCh-aJvNOBgV_uMPzqznKQ","modelVersion"
3	☐	RSP...	☒	☐	Of course. The phone number you asked me ...	{"responseId":"aCh-akJWM6bn_uMP7aSfuA8","modelVersio

Add Component

To add a component, follow these steps:

- Open any Salesforce record on the necessary object and click on the gear icon. **Setup Menu -> Edit Page**



- In the search box, type “AI” and find our component.

Standard (3)

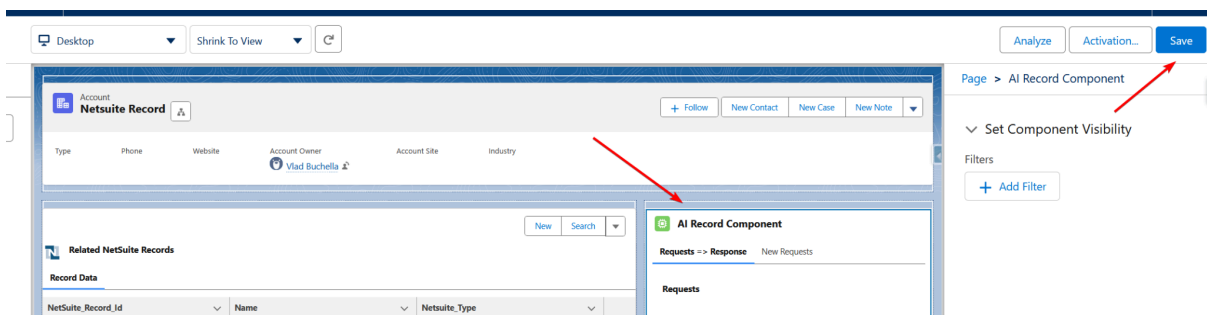
- Record Detail
- Record Detail - Mobile
- runtime_sales_seller_home:kpiCont...

Custom (0)

Custom - Managed (2)

- AI Record Component
- jsonReactContainer

- Drag it to your page and add it
- Click *Save*



Using the AI Record Component

You can make your request from the Salesforce records:

1. Go to Lightning App Builder
2. Add the 'AI Record Component' component
3. The AI Record Component has two tabs for using:

- New Requests: select the created AI Model, make request on Salesforce record

You can select data entry from the drop-down menu.

 **AI Record Component**

Requests => Response **New Requests**

Make Request

* Salesforce Record/s

Vlad Buchella

Models

 Gemini

X

Activate History ☒ Active

* Parent Response Element

Select an Record/s

* Text 

You are a helpful assistant.

Role 

model

* Text 

text

Role 

user

pfu

- User Input Text
- User Input Text With System Context
- User Input File

- User Input Text

Available fields that need to be filled in:

- Text - your prompt.
- Role - user or model

*Text ⓘ text

Role ⓘ user ▼

- User Input with System Context

Available fields that need to be filled in:

- Text - your prompt for AI/User.
- Role - user or model

*Text ⓘ

You are a helpful assistant.

Role ⓘmodel

*Text ⓘ

text

Role ⓘuser

- User Input File

Available fields that need to be filled in:

- Text - your prompt for AI/User.
- Role - user or model
- Data - upload your file.

*Text

text

Role

user

data

Files source

Upload File

Upload Files

Or drop files

Role

user

Note: It is possible to upload files.

- Requests => Response: viewing history of requests and responses for Salesforce record

 **Ai Record Component**

Requests => Response New Requests

Requests

✓ REQ-0000 ✓

You are a helpful assistant,say hi

✓ Responses (1)

RSP-0000

Hello! How can I assist you today?

Custom Flow Integration with AI Request Action

The AI Request Apex Action enables you to build dynamic AI prompts using a structured messages array based on OpenAI's Chat API format. This approach allows you to define multi-part messages that include system instructions, user inputs, and contextual Salesforce data—making each AI interaction flexible and deeply personalized.

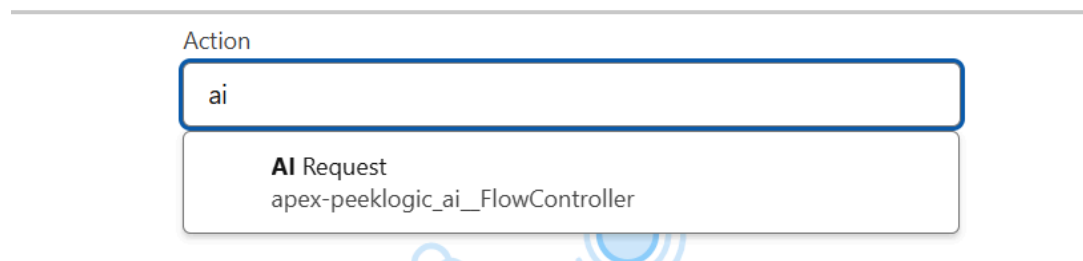
What Are Messages?

Each message in the array represents a piece of the prompt. It includes:

- Role — Defines the context of the message
- Content — The text content sent to the AI model
- Type of Input — Specifies where the message content comes from (manual input, flow variables, formulas, etc.)

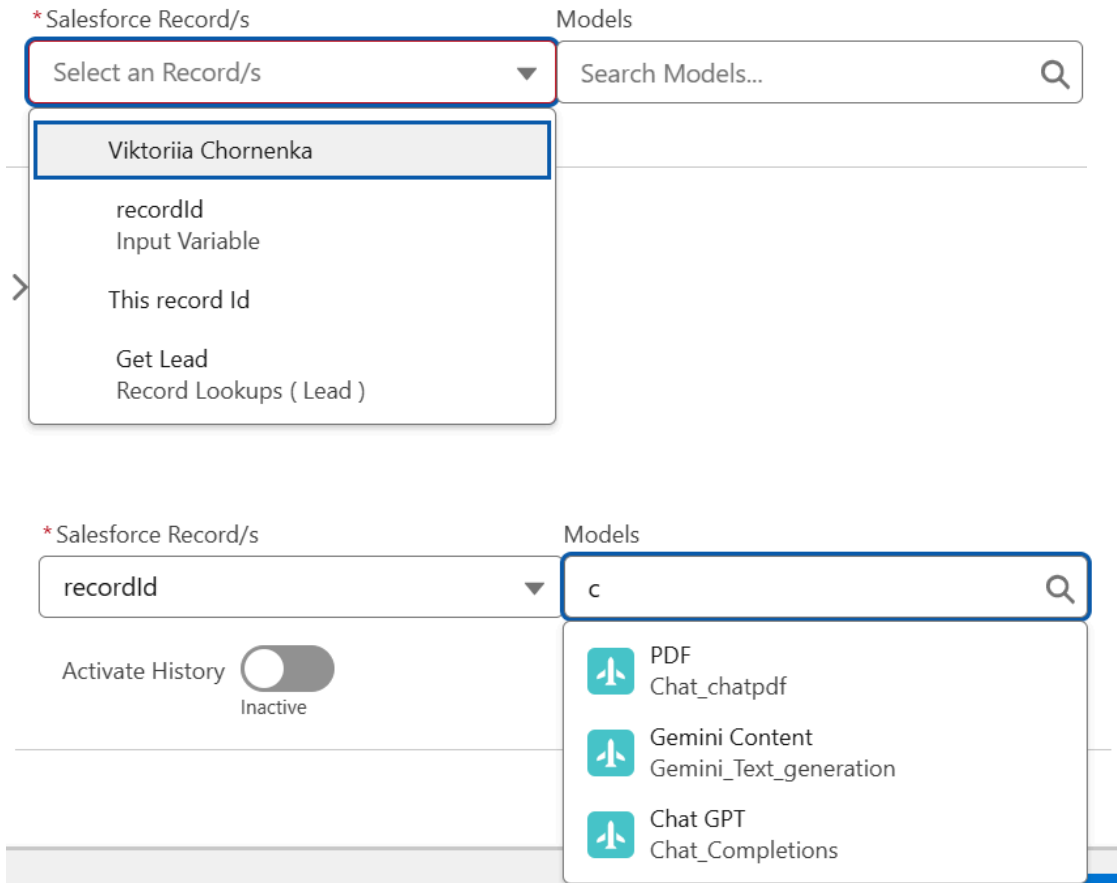
Peeklogic AI Orchestrator provides an Apex Action 'AI Request' in flow for implementing automations according to own use cases:

New Action



The screenshot shows the 'New Action' dialog in Salesforce Flow Builder. The 'Action' field is a text input containing 'ai'. Below this input, a dropdown menu displays the selected action: 'AI Request' from the 'apex-peeklogic_ai__FlowController' namespace. The background of the dialog is light gray, and the text is in a standard sans-serif font.

1. Select the Salesforce Record that should be related to the Request and Response and Model that you created in Peeklogic AI Setup



2. Click on the icon in order to choose Type Of Input firstly and then select the appropriate resource where you can describe the main task for AI provider

Supported Input Types:

For each message, you can choose from the following input types:

- Manual — Static text written directly in the flow
- Record Field Value — Pulls data from the triggering record
- Formulas — Combines values using Salesforce Flow formulas
- Text Templates — Predefined text templates, supporting merge fields and formatting
- Constants — Static values defined in the flow
- Variables — Flow variables captured during runtime

This enables the AI request to be context-aware, highly customized, and adaptable to your business logic.

The image displays two screenshots of a configuration interface, likely for an AI chatbot or workflow engine. The top screenshot shows a configuration panel with two sections. The first section, labeled '* Type Of Input', has a red arrow pointing to its icon. A dropdown menu is open for this section, showing options: 'Input Type', 'Manual', 'Record Field Value', 'formulas', 'textTemplates', 'constants', and 'variables'. The second section, labeled '* Text', has a dropdown menu open showing options: 'text', 'GeminiTask', and 'recordId'. The bottom screenshot shows the same configuration panel with the dropdowns closed. The first section now shows 'text' selected in the dropdown, and the second section shows 'text' selected in the dropdown. Below the second section, there is a 'Role' dropdown menu with 'user' selected.

3. Select role, if AI provider demands it. It helps structure the conversation.

* Text

You are a helpful assistant.

Role

model

* Text

✓ model

user

Role

user

4. For Chat PDF, provide PDF file as:

a. public URL

public URL

https://orgfarm-ba36736d96-dev-ed.develop.file:

* content

Please check this sv and summarize it and give r

OR

b. record of Content Document Link

* content

\$Record.Description

* PDF file

get file

Notes

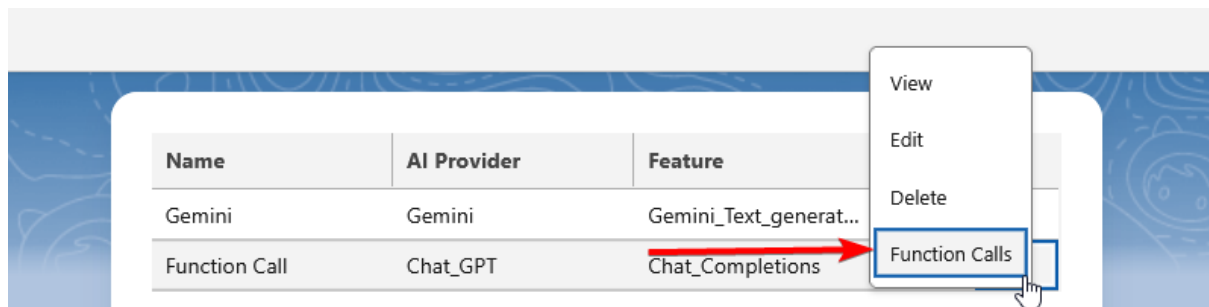
- Ensure your API key is valid and has sufficient quota
- Named Credential setup is required only once per org
- All data is logged for auditability: requests, responses, and models
- You can update or delete AI model configurations at any time
- Image generation supports base64 and URL responses, depending on use case

Function Call

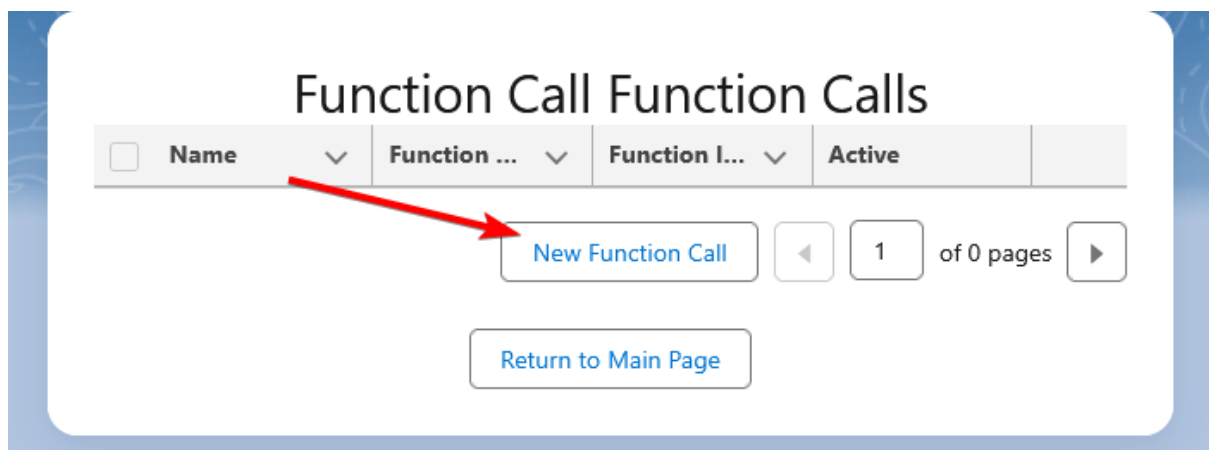
Function Call allows us to create an apex class that will process responses sent to AI. Also, split them up and organize them so they're easier to work with.

To create a Function Call, you need to:

1. Create a model based on Chat GPT.
2. Press "Function Calls"



3. Click on "New Function Call"



A window will open with the following fields to fill in:

- Function Call Name - The title must start with a letter or an underscore. Must be alphanumeric (a-z, A-Z, 0-9), underscores (_), dots (.) or dashes (-), with a maximum length of 64.
- Function Name (*Required field*) - The title must start with a letter or an underscore. Must be alphanumeric (a-z, A-Z, 0-9), underscores (_), dots (.) or dashes (-), with a maximum length of 64.
- Description
- Function Implementation Path - Name of your Apex Class

New Function Call

Function Call Name

* Function Name

Description

* Function Implementation Path

Cancel

Save

[Return to Main Page](#)

After Function Call creation , we will create parameters.

- Click on “Add Parameters”

The screenshot shows a web interface for managing function calls. At the top, there's a header 'Function Call Function Call'. Below it is a table with columns: Name, Function ..., Function I..., and Active. The first row has a checkbox, a link '> Send Email', the text 'Send_Email', 'EmailSender', and a checkbox. A context menu is open over the first row, with options: View, Edit, Add parameter (highlighted with a red arrow), Activate, and Delete. Below the table, there are buttons for 'New Function Call', 'Return to Main Page', and a pagination indicator '1 of 1 pages'.

The following window will open.

New Function Parameter

* Function Call

 Send Email

* Type

String ▼

--None--

✓ String

Integer

Number

Boolean

Object

Array

The following types are available when creating parameters:

- String

* Type
String ▼

Required
☐

* Parameter Name

Description

Min

Max

Pattern ⓘ

Format
--None-- ▼

Enum ⓘ

Save

The following fields are available for filling in:

- Required - Checkbox that makes this parameter required
- Parameter Name (Required Field)
- Description
- Min - Minimum string length.
- Max - Max string length.
- Pattern - Regex pattern. Example `^[0-9]{5}$`
- Format
 - email
 - uri
 - uuid
 - date-time
 - date
 - time

- hostname
- ipv4
- ipv6
- Enum - Available list in JSON format ([*"Completed"*, *"In Progress"*, *"Not Started"*])

- Integer

*Type

Integer ▼

Required

☐

*Parameter Name

Description

Min

Max

Save

The following fields are available for filling in:

- Required - A checkbox that makes this parameter required
- Parameter Name (Required Field)
- Description
- Min - Minimum string length.
- Max - Max string length.

- Number

Type

Number

Required

☐

Parameter Name

Description

Min

Max

Pattern 

Save

The following fields are available for filling in:

- Required - A checkbox that makes this parameter required
 - Parameter Name (Required Field)
 - Description
 - Min - Minimum string length.
 - Max - Max string length.
 - Pattern - Regex pattern. Example `^[0-9]{5}$`
- Boolean

*Type

*Parameter Name

Description

Save

The following fields are available for filling in:

- Parameter Name (Required Field)
- Description

- Object (*Reserved for future use*)
- Array (*Reserved for future use*)

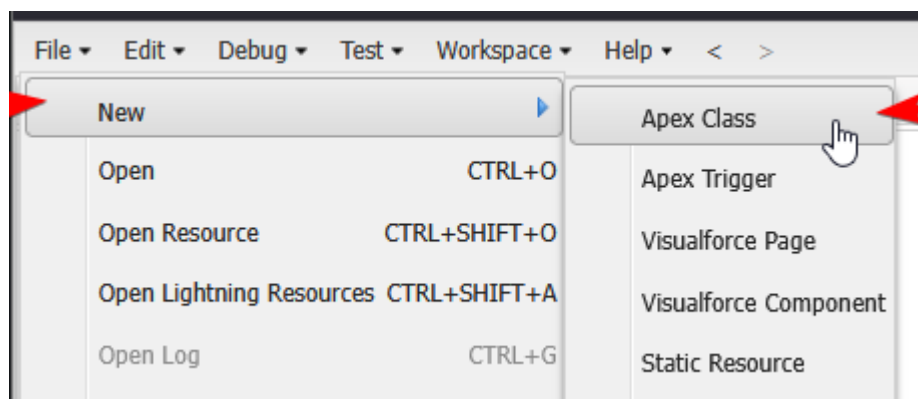
Once you have created the parameters according to your prompt, the AI will generate a response for you, and your Apex code will parse it into the correct fields for quick date handling.

Chat Completions Function Calls

☐	Name ▾	Function ... ▾	Function I... ▾	Active	
☐	▾ Get user	Get_user	Get_User	✓	▾
☐	Name	string	Required	✓	▾
☐	▾ Get Ticket	Create_Ticket	Create_Ticket	✓	▾
☐	Activit...	string	Not Required	✓	▾
☐	Priority	string	Not Required	✓	▾
☐	Descri...	string	Not Required	✓	▾
☐	Subject	string	Required	✓	▾
☐	Status	string	Not Required	✓	▾
☐	UserId	string	Required	✓	▾

To use our Function Call, you need to create an Apex class:

Click **File -> New -> Apex Class**



Your class must contain implements *peeklogic_ai.Function_call*

Let's take the example of searching for a user and creating a task for that user.

In the first case, we have one parameter, the name we are searching for. Our Apex Class, which implements "peeklogic_ai.Function_call," parses our response, and we obtain our name.


```

global class Get_User implements peeklogic_ai.Function_call {

    global String executeFunction(Map<String,Object> inputMap, List<peeklogic_ai__Function_parameter__c> parameters){
        for (String key : inputMap.keySet()) {
            System.debug(key + ': ' + inputMap.get(key));
        }
        //from input map get name and create query to get user where name like map value
        if(inputMap == null || !inputMap.containsKey('Name')){
            Throw new IllegalArgumentException('Name is required');
        }
        return JSON.serialize([
            SELECT Id, Username, LastName, FirstName, Name, CompanyName, Department, Division, Title, Street, City, State, PostalCode
            FROM User
            WHERE NAME LIKE :'%'+inputMap.get('Name')+'%'
            AND IsActive = true
            LIMIT 100
        ]);
        //system.debug(parameters);
        //return null;
    }
}
}

```

In the second case, we have several parameters. Accordingly, our apex class already structures them for quick work with them. And we have direct access to the date that we have recorded in the parameters.

```

global class Create_Ticket implements peeklogic_ai.Function_call {

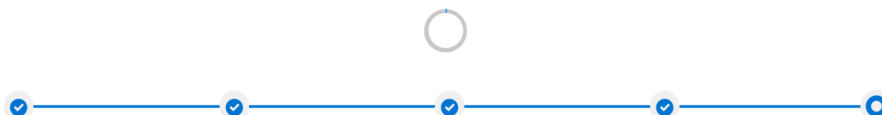
    global String executeFunction(Map<String,Object> inputMap, List<peeklogic_ai__Function_parameter__c> parameters){
        for (String key : inputMap.keySet()) {
            System.debug(key + ': ' + inputMap.get(key));
        }

        for (peeklogic_ai__Function_parameter__c param : parameters) {
            System.debug('Parameter: ' + param);
        }
        if(inputMap == null || !inputMap.containsKey('UserId') || !inputMap.containsKey('Subject') || !inputMap.containsKey('Description')){
            Throw new IllegalArgumentException('Required attribute missing');
        }
        system.debug(JSON.serialize(inputMap));
        Task task = new Task();
        task.Subject = (String)inputMap.get('Subject');
        task.Description = (String)inputMap.get('Description');
        //task.OwnerId = (Id)inputMap.get('UserId');
        task.Status = (String)inputMap.get('Status');
        task.Priority = (String)inputMap.get('Priority');
        task.ActivityDate = Date.valueOf((String)inputMap.get('ActivityDate'));
        insert task;
        return '';
    }
}
}

```

Prompt: “Create a high-priority ticket for user 0058Z00000BvNke with subject “Urgent issue in checkout” and description “Customer reports that the checkout page is freezing.” Set the status to “Not Started” and the due date to tomorrow. Today 22.07.2025”

Response:



A high-priority ticket will be created for user 0058Z00000BvNke with the following details: - Subject: Urgent issue in checkout - Description: Customer reports that the checkout page is freezing. - Status: Not Started - Due Date: 23.07.2025 (tomorrow) - Priority: High If you need to add more information or assign the ticket to someone, let me know!

Thanks to these structured parameters, we can quickly create our Task.



Task

Urgent issue in checkout

Name

Related To

Details

Related

Assigned To

 [Viktoriia Chornenka](#)



Subject

Urgent issue in checkout



Due Date

7/23/2025



Priority

High



Created By

 [Viktoriia Chornenka](#), 7/22/2025, 3:54 AM

Comments

Customer reports that the checkout page is freezing.

Event	Details
USER_DEBUG	[5] DEBUG UserId: 0058Z00000BvNke
USER_DEBUG	[5] DEBUG Status: Not Started
USER_DEBUG	[5] DEBUG Subject: Urgent issue in checkout
USER_DEBUG	[5] DEBUG Description: Customer reports that the checkout page is freezing.
USER_DEBUG	[5] DEBUG Priority: high
USER_DEBUG	[5] DEBUG ActivityDate: 2024-06-15
USER_DEBUG	[9] DEBUG Parameter: peeklogic_ai__Function_parameter__c:{peeklogic_ai__Function_Call__c=a05gL000004fMzxQAE, I
USER_DEBUG	[9] DEBUG Parameter: peeklogic_ai__Function_parameter__c:{peeklogic_ai__Function_Call__c=a05gL000004fMzxQAE, I
USER_DEBUG	[9] DEBUG Parameter: peeklogic_ai__Function_parameter__c:{peeklogic_ai__Function_Call__c=a05gL000004fMzxQAE, I
USER_DEBUG	[9] DEBUG Parameter: peeklogic_ai__Function_parameter__c:{peeklogic_ai__Function_Call__c=a05gL000004fMzxQAE, I
USER_DEBUG	[9] DEBUG Parameter: peeklogic_ai__Function_parameter__c:{peeklogic_ai__Function_Call__c=a05gL000004fMzxQAE, I
USER_DEBUG	[9] DEBUG Parameter: peeklogic_ai__Function_parameter__c:{peeklogic_ai__Function_Call__c=a05gL000004fMzxQAE, I
USER_DEBUG	[14] DEBUG {"ActivityDate":"2024-06-15","Priority":"high","Description":"Customer reports that the checkout page is free:

Conclusion

The AI Connector allows your Salesforce org to access OpenAI's advanced capabilities directly inside the platform. You can create, edit, and manage various AI features via a simple interface and test everything in real time.

Whether you want to generate images, use ChatGPT, moderate content, or get text completions, this tool lets you do it securely and flexibly.

For questions or access issues, contact your Salesforce administrator or AI Connector App Manager.