

Knowledge Base
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455 Credits
JA

Queue

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Salesforce Knowledge Creation Agent
Complete

Output Completed

Case_Details_20250310_0016

Case Details

- Case Number: 00001047
- Subject: Intermittent Connectivity Issues with Project Catalyst - Blocking Progress on Alpha Project
- Status: In Progress
- Priority: High
- Created Date: 2025-01-08
- Last Modified Date: 2025-01-08

Description

Subject: Urgent - Project Catalyst Connection Problems - Alpha Project Blocked

Dear Innovate Solutions Support Team,

We are experiencing significant intermittent connection issues with Project Catalyst this morning. Several of our project team members (at least 5) are getting randomly disconnected while using the software. They are seeing messages indicating a loss of connection, and it's disrupting their workflow incredibly significantly. This started happening around 10:30 AM PST. We've checked our internet connection, and it seems stable as we can access other online tools, including our internal project management system and shared drives, without any problems. This seems to be definitely isolated to Project Catalyst. Could you please investigate this as a matter of absolute urgency? We have critical deadlines approaching for the Alpha Project, and this is severely impacting our ability to meet them.

Please let me know what information you need from our end. We are using the latest version of Chrome on Windows 10, if that helps.

Sincerely,
Robert Miller
Project Manager
Global Innovations Corp.

Output

Troubleshooting Intermittent Connectivity Issues with Project Catalyst

Issue Summary

Users experienced intermittent connectivity issues with Project Catalyst, leading to disruptions in workflow. The issue was isolated to Project Catalyst and was reported as high-priority due to its impact on critical project deadlines.

Symptoms

- Random disconnections while using Project Catalyst
- Error message: "Connection to Project Catalyst Server Lost. Attempting to Reconnect..."
- Error Code: CS-102
- Issue persisted despite stable internet connection

Troubleshooting Steps Taken

- Initial Investigation
 - Verified user entitlement and SLA status
 - Checked for recent network changes (none reported by IT team)
 - Confirmed affected users (approx. 5 in the main office)
- Basic Troubleshooting
 - Provided KB article KB00098 (Troubleshooting Common Network Issues)
 - Steps included clearing cache, restarting router, and checking network settings
- Escalation to Level 2 Support
 - Root Cause: Overload on the primary database server due to an automated data synchronization job consuming excessive resources

Resolution:

- Terminated the runaway data sync job

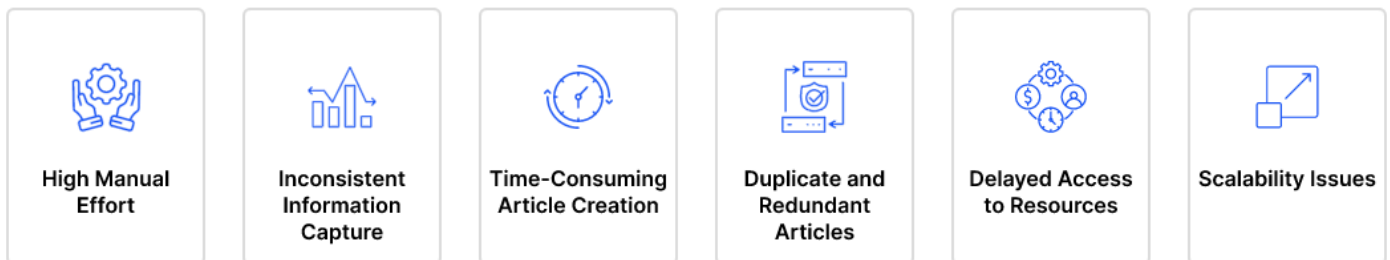
Agent Activity

- Catch Webhook
- Trigger Inputs
- Remove

Salesforce Knowledge Creation Agent Solution Document

| Problem Statement

Customer support teams face significant challenges in creating and managing knowledge articles, particularly in high-volume environments where efficiency is critical. Customer support agents must spend valuable time recording resolution steps, verifying accuracy, and updating knowledge bases, which delays access to essential resources and diverts their attention from resolving customer issues. Support teams struggle to quickly locate relevant information, leading to inefficiencies and longer resolution times due to disorganized documentation, poor knowledge management, or ineffective search tools. Without automation, capturing key case details becomes inconsistent, leading to missed insights that could improve future resolutions. Maintaining up-to-date and accurate information is another challenge, as evolving products and processes quickly render manual updates cumbersome and unreliable. Additionally, duplicate content often clutters the knowledge base, making it harder for agents to quickly find the most relevant information. As the volume of support cases grows, manually managing an expanding repository of articles becomes unsustainable, reducing overall productivity and diminishing the customer experience. To address these inefficiencies, an automated solution is needed to streamline knowledge article creation, enhance accuracy and consistency, ensuring customer support teams can deliver faster and more effective assistance.

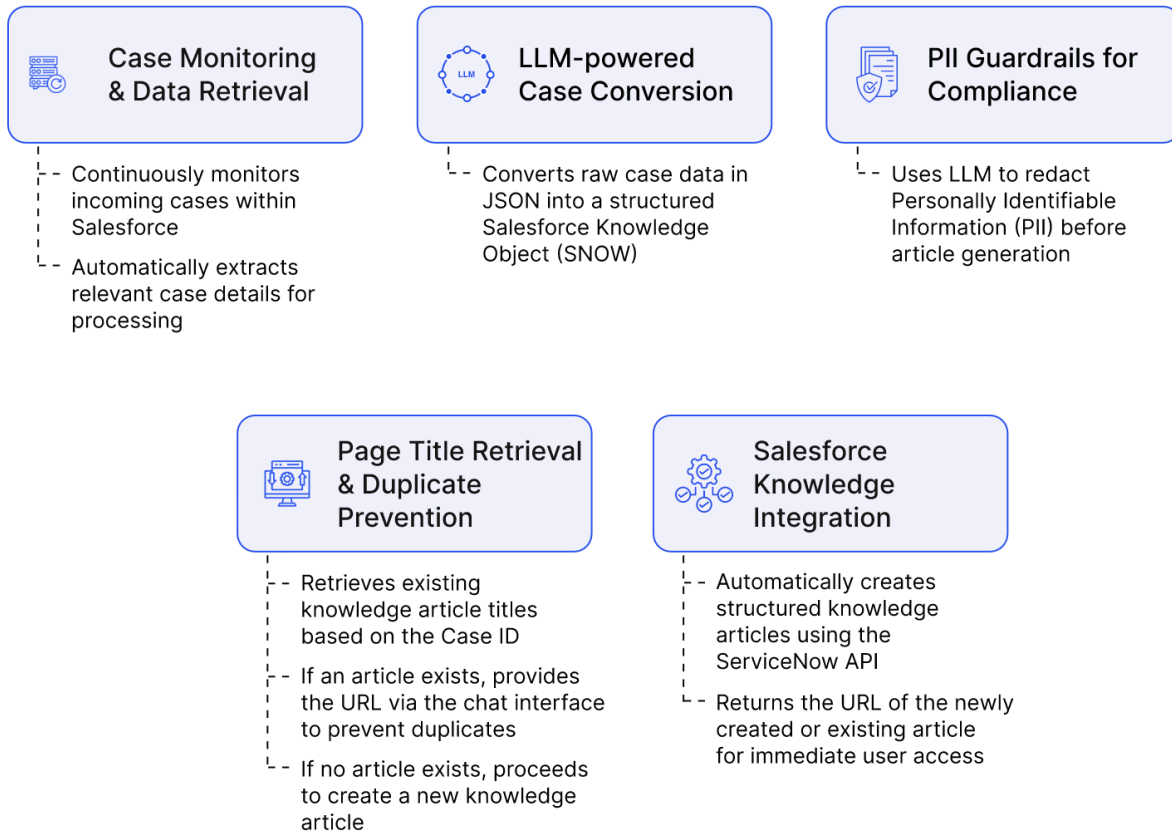


| Solution Statement

The ZBrain Salesforce Knowledge Creation Agent automates the generation and management of knowledge articles within Salesforce. It ensures customer support, sales teams, and service agents have instant access to accurate, up-to-date information for resolving customer inquiries, troubleshooting issues, and improving service efficiency. Leveraging a Large Language Model (LLM), the agent extracts key insights from case logs to generate well-structured, high-quality articles. To maintain a clean and efficient knowledge base, it automatically checks for existing content using case IDs. If a duplicate exists, it retrieves the link to the existing article; otherwise, it creates a new one as needed. It also formats content for consistency, clarity, and readability. By automating knowledge article creation, the agent reduces manual effort, eliminates inconsistencies, and keeps knowledge readily available. This enhances support efficiency, accelerates response times, and optimizes overall knowledge management, equipping teams with a continuously updated and reliable resource.

Agent Setup

The ZBrain Salesforce Knowledge Creation Agent is equipped with the following components for seamless knowledge generation and management within Salesforce:



1. Case Monitoring & Data Retrieval

- **Automated Tracking:** The agent continuously monitors incoming cases within Salesforce and auto-extracts relevant details.

2. LLM-powered Case Conversion

- **Structured Content Transformation:** An LLM converts raw case data (JSON format) into a structured Salesforce Knowledge Object (SNOW), ensuring clarity and readability.

| Agent Setup

3. PII Guardrails for Compliance

- **Data Privacy Enforcement:** The LLM redacts Personally Identifiable Information (PII) before generating knowledge articles, ensuring compliance and data privacy.

4. Page Title Retrieval & Duplicate Prevention

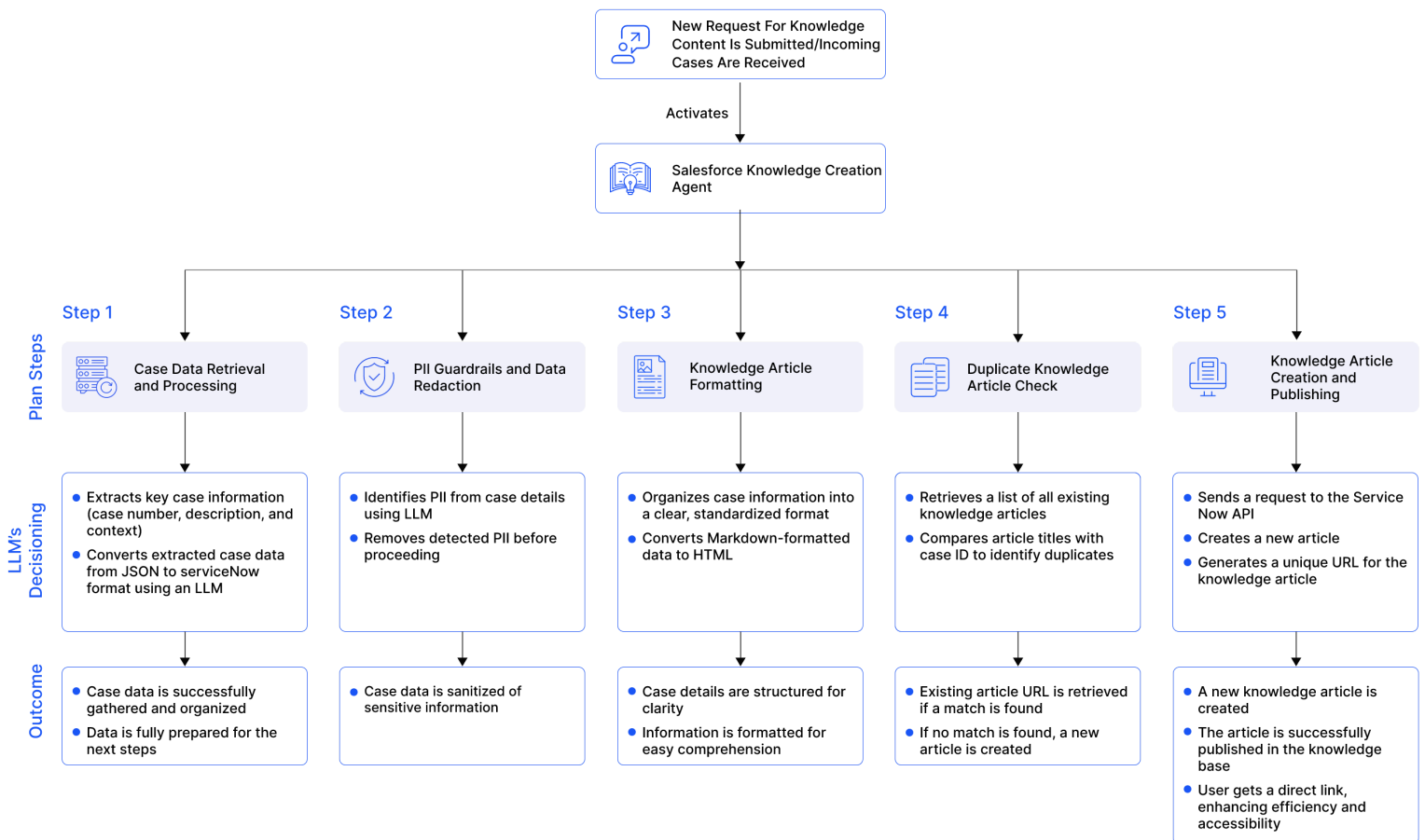
- **Existing Articles Lookup:** The agent retrieves existing knowledge article titles based on the Case ID.
- **Duplicate Handling:**
 - If an article exists, the agent provides the URL in the chat interface, avoiding redundant entries.
 - If no existing article is found, the agent creates a new knowledge article.

5. Salesforce Knowledge Integration

- **Seamless Integration:** The agent automatically creates a new knowledge article with structured content.
- **Instant Access via Chat Interface:** Upon successful creation, the agent returns the URL of the newly generated or pre-existing knowledge article, enabling quick access for users.

How The Agent Works

The Salesforce Knowledge Creation Agent automates and optimizes the process of generating knowledge articles, ensuring high standards of consistency, accuracy, and efficiency. The agent is triggered whenever a new request for knowledge content is submitted or when incoming cases are received. Leveraging LLM, the agent intelligently analyzes incoming data, creates relevant and well-structured articles, and ensures seamless integration with Salesforce's knowledge management standards. Below is a detailed breakdown of how the agent functions:



| How The Agent Works

Step 1: Case Data Retrieval and Processing

The process begins when a case is received through an integrated system. The agent fetches all relevant case details and prepares them for further processing.

Key Tasks:

- **Case Data Extraction:** The agent retrieves case information, including the case number, description and other contextual details.
- **Data Structuring:** The extracted case data in JSON format is transformed into a standardized, ServiceNow-compatible structure using an LLM for seamless processing.

Outcome:

- The agent successfully gathers and organizes the case data, ensuring it is ready for the next steps.

Step 2: PII Guardrails and Data Redaction

To ensure compliance and protect customer privacy, the agent applies PII (Personally Identifiable Information) guardrails to remove sensitive details from the case data.

Key Tasks:

- **Detection of Sensitive Information:** The agent identifies PII such as customer names, phone numbers, email addresses, and account numbers from case details using LLM.
- **Automated Redaction:** Any detected PII is removed before proceeding.
- **Validation Check:** The agent ensures that only non-sensitive, relevant case details remain for the knowledge article.

Outcome:

- The processed case data is free of sensitive customer information and ready for knowledge article generation.

Step 3: Knowledge Article Formatting

The agent converts the structured case data into a knowledge article format.

Key Tasks:

- **Markdown Structuring:** The agent organizes case information into a clear, standardized format for improved readability and consistency.
- **HTML Conversion:** The Markdown-formatted data is converted into HTML for seamless integration with the knowledge base system.

Outcome:

- The case details are structured and formatted for easy comprehension.

| How The Agent Works

Step 4: Duplicate Knowledge Article Check

Before creating a new knowledge article, the agent checks whether an article already exists for the given case to prevent duplication.

Key Tasks:

- **Fetching Existing Articles:** The agent retrieves a list of all existing knowledge articles from the knowledge base.
- **Title Matching:** The agent compares the titles of existing articles with the current case title and case ID to check for duplicates.
- **Duplicate Verification:** If an article with the same case ID already exists, the agent flags it as a duplicate.

Outcome:

- If an existing article is found, the agent retrieves and provides the existing article's URL.
- If no existing article is found, the agent proceeds to create a new one.

Step 5: Knowledge Article Creation and Publishing

If no duplicate article exists, the agent proceeds to create and publish a new knowledge article.

Key Tasks:

- **API Call to Knowledge Management System:** The agent sends a request to the Service Now API to create a new article.
- **Content Submission:** The agent submits the formatted case details.
- **Confirmation and URL Generation:** Once created, the system generates a unique URL for the knowledge article.

Outcome:

- A new knowledge article is successfully created and published in the knowledge base.
- The generated URL is returned for future reference, improving efficiency and accessibility.

| Key Benefits



Automates Article Creation

Reduces manual effort by generating structured knowledge articles, allowing support teams to focus on resolving new cases.



Enhances Knowledge Base Accuracy

Publishes only verified, well-structured, and duplicate-free content to maintain high-quality documentation.



Faster Resolution and Response Times

Provides instant access to relevant knowledge articles, helping agents resolve similar cases quickly and improving overall service response times.



Ensures Compliance and Data Privacy

Applies robust PII detection and redaction to safeguard sensitive customer information.



Seamless Salesforce Integration

Works natively within Salesforce, enabling real-time knowledge management without disrupting workflows.



Scalable and Customizable

Adapts to various case types and business needs, allowing for tailored workflows and flexible knowledge article formats.

| Conclusion

The Salesforce Knowledge Creation Agent transforms knowledge management by automating the creating, structuring, and publishing of high-quality knowledge articles. By leveraging LLM, it ensures accuracy, eliminates redundancy, and maintains compliance with data privacy regulations. The agent seamlessly integrates with Salesforce, automating knowledge article creation to minimize manual effort and accelerate response times, ensuring quick and accurate access to relevant information. Its ability to continuously learn and adapt to evolving business needs makes it a dynamic and scalable solution. With real-time updates, intelligent duplicate detection, and automated formatting, this agent empowers organizations to build a robust and ever-improving knowledge base, driving efficiency and improving customer and employee experiences.