

DMD User Guide

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The goal of this document is to provide information to administrators so that they can configure the DMD app in Salesforce.

The guide also provides instructions for end-users to help them get the most out of the functionality in the application.

DMD checks documents using Open AI GPT-4 model.

The document types and rules that you can run depend on your customization. See the user guide for details on how to customize the rules and rules sets that will be run against the documents.

Installation

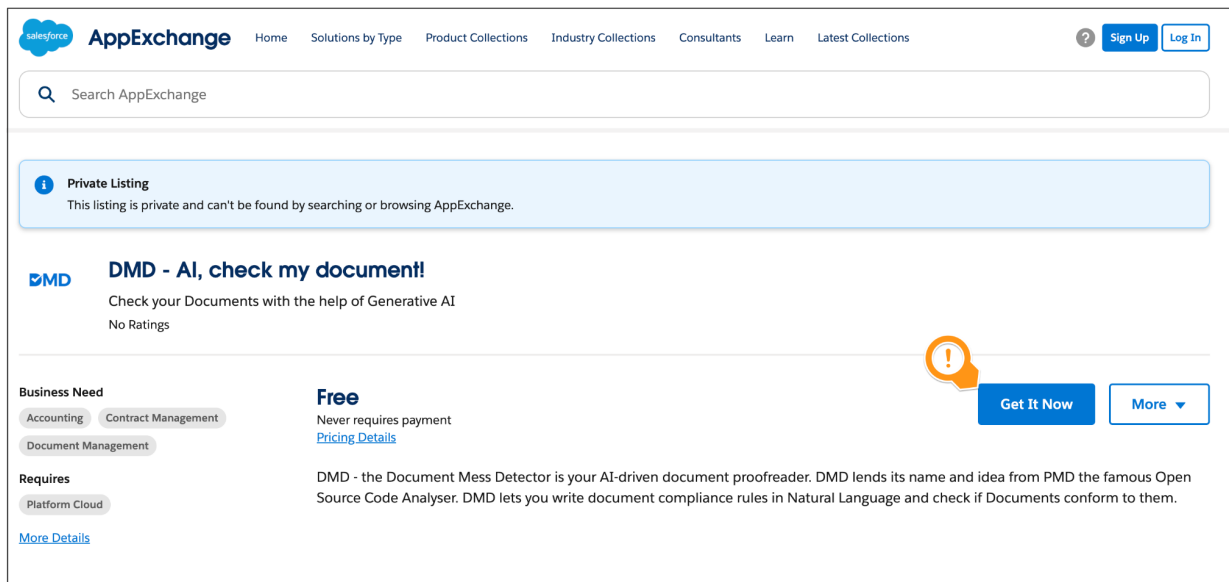
Follow the steps below in the given order to install the DMD Salesforce app to your Salesforce environment.

Most of those steps require you to be a System Administrator of your Salesforce production org.

Install App from the AppExchange

Load the AppExchange Listing page in your browser. You should see something like this. Click the big Install button.

It will ask you to log in to your Salesforce organization. Do that when asked for and continue the installation.





In the next screen, you will be asked who to grant access to the app. We recommend sticking with the default "Install for Admins Only."




Install DMD - Document Mess Detector

By Aquivalabs (Packaging DMD)


☒ **Install for Admins Only**


☐ **Install for All Users**


☐ **Install for Specific Profiles...**



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

App Name	Publisher	Version Name	Version Number
DMD - Document Mess Detector	Aquivalabs (Packaging DMD)	1.28	1.28

Additional Details [View Components](#)

The App is making use of multiple external APIs and you need to approve the usage on this screen.

By DMD (Document Mess Detector) Packaging Org

An earlier version is installed. It can be upgraded while preserving existing data.
Installed: 1.6 (1.6) New Version: 1.7 (1.7)

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"/>
v2.convertapi.com	<input checked="" type="checkbox"/>

☒ Yes, grant access to these third-party web sites


Continue **Cancel**

Once the installation has started, the following status will appear:



Install DMD - Document Mess Detector

By Aquivalabs (Packaging DMD)

 **Installing and granting access to admins Only...**

App Name	Publisher	Version Name	Version Number
DMD - Document Mess Detector	Aquivalabs (Packaging DMD)	1.28	1.28

[Additional Details](#) [View Components](#)

The installation process may take some minutes. Take into account that, in case the installation time takes longer than the default threshold, Salesforce will notify asynchronously via e-mail.

Grant Permissions for App Setup

For the Admin user to be able to set up the DMD package, the Admin user will require the necessary permissions to view the pages and perform actions such as authorization or configuration. Those permissions are provided through the *DMD App Administrator* permission set, included in the installed package.

To provide the mentioned permission set to the Admin user, navigate to *Users* in the Setup Menu, select the Admin user, and Edit the permission set assignment, by adding the *DMD App Administrator* permission set. The steps are displayed in the below screenshots.

Setup Home Object Manager

Search Setup

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users 1. Users Section

Didn't find what you're looking for? Try using Global Search.

User Admi Admin User 2. DMD Admin User

Permission Set Assignments Edit Assignments 3. Edit Permission Set Assignments

No records to display

Alias	AAdmi	User License	Salesforce
Email	admin@admi.com [Verified]	Profile	System Administrator
Username	admin@dmd.uat	Active	<input checked="" type="checkbox"/>
Nickname	User16841585840481296096	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	DMD UAT	Sales Anywhere User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	US	Mobile Push Registrations	<input checked="" type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Locale	English (United States)	Debug Mode	<input type="checkbox"/>
Language	English	High-Contrast Palette on Charts	<input type="checkbox"/>
Delegated Approver		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Manager		Send Apex Warning Emails	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Make Setup My Default Landing Page	<input type="checkbox"/>
Federation ID		Quick Access Menu	<input checked="" type="checkbox"/>
Ann Registration: One-Time Password Authenticator		Development Mode	<input type="checkbox"/>

Verify installation

Once the package has been successfully installed and the Admin user has the permissions, an app named *DMD - AI, check my document!* will be visible in the App Launcher.

Setup Home Object Manager

Search Setup

users

Users

Permission Set Groups

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User Management Settings

Users 1. Users Section

Didn't find what you're looking for? Try using Global Search.

User Admi Admin User 2. DMD Admin User

Permission Set Assignments Edit Assignments 3. Edit Permission Set Assignments

No records to display

Alias	AAdmi	User License	Salesforce
Email	admin@admi.com [Verified]	Profile	System Administrator
Username	admin@dmd.uat	Active	<input checked="" type="checkbox"/>
Nickname	User16841585840481296096	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	DMD UAT	Sales Anywhere User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	US	Mobile Push Registrations	<input checked="" type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Locale	English (United States)	Debug Mode	<input type="checkbox"/>
Language	English	High-Contrast Palette on Charts	<input type="checkbox"/>
Delegated Approver		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Manager		Send Apex Warning Emails	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Make Setup My Default Landing Page	<input type="checkbox"/>
Federation ID		Quick Access Menu	<input checked="" type="checkbox"/>
Ann Registration: One-Time Password Authenticator		Development Mode	<input type="checkbox"/>

Apps

DMD DMD - AI, check my document!

Items

No results

View All

Release Updates

Lightning Experience Transition

Setup

Allow DMD to securely store its Settings

For each AI Model DMD supports it comes prepackaged with a Configuration record that is invisible in the Subscriber org. Because it is a so called Protected Custom Metadata record.

For the DMD Setup page to modify this record an Org Setting needs to be activated. Activate the Checkbox under Setup > Custom Code > Apex Settings > Deploy Metadata from Non-Certified Packages.

Q Apex Se

Custom Code

Apex Settings

Didn't find what you're looking for?
Try using Global Search.

SETUP Apex Settings

Apex Settings

Success:
Your settings have been successfully saved.

Save Cancel

- ☒ Deploy Metadata from Non-Certified Package Versions via Apex
- ☐ Restrict non-core users from executing anonymous Apex
- ☐ Perform Synchronous Compile on Deploy

Caution: disabling this option may cause the organization to experience a brief period of downtime.

Default minimum enqueue delay (in seconds) for queueable jobs that do not have a timeout

Save Cancel

Authenticate with External APIs

In the DMD Lightning App click on the Setup tab and enter the API Keys for the ExtractorAPI and OpenAI API. You need to open an account with both to use DMD.

DMD

DMD - AI, check m... Files Rules Rulesets Analyses Regression Tests **Setup** Learn More...

Complete all the mandatory step to finish setting up the app

✓ **Authorize API to extract text from Documents**
Your *Extractor API Key* was successfully stored in a Protected Custom Setting.

API Key

ExtractorAPI Key

✓ **Setup Open AI API as an AI Model**
Your Settings were securely stored in a Protected Custom Metadata.

API Key

Settings

```
{
  "model": "gpt-4-0613",
  "context": "Your task is to check whether a business document"
```

OpenAI API Key

- <https://extractorapi.com/accounts/signup/>



Your API Key ([Refresh](#)):

d30e3045533459abd2896d62955c6577b5523d55

Sample Extractor Code:

<https://extractorapi.com/api/v1/extractor/?apikey=d30e3045533459abd2896d62955c6577b5523d55>

- <https://auth0.openai.com/u/signup>

Create your account

Note that phone verification may be required for signup. Your number will only be used to verify your identity for security purposes.

Email address

Continue

Already have an account? [Log in](#)

ORGANIZATION



- Settings
- Usage
- Rate limits
- Members
- Billing

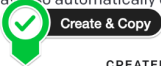
USER

API keys

API keys

Your secret API keys are listed below. Please note that we do not display your secret API keys again after you generate them.

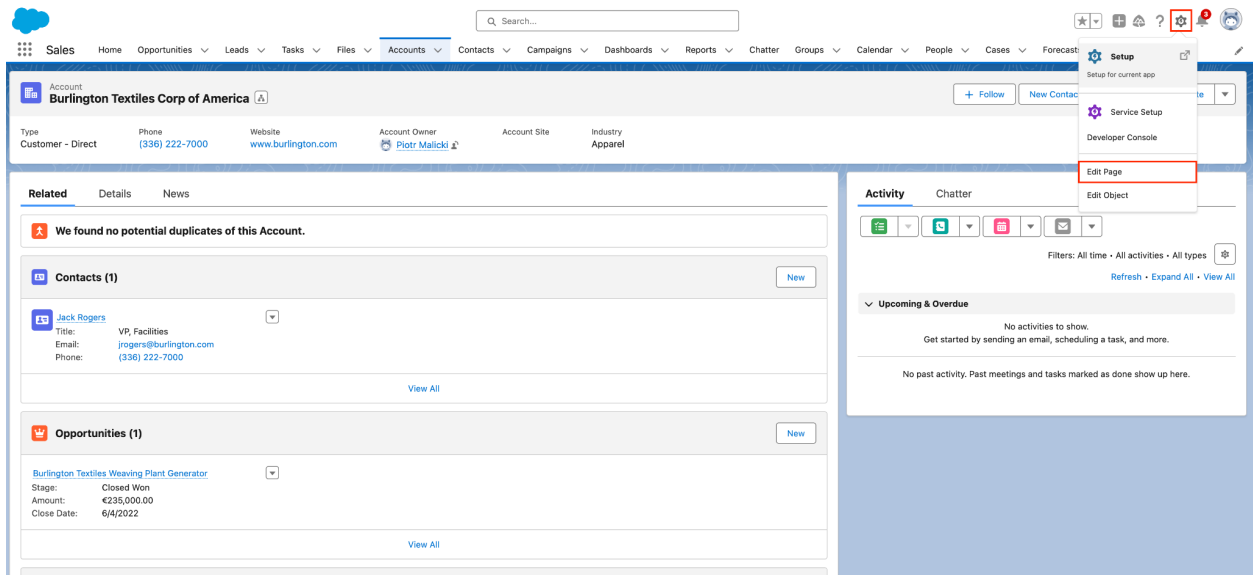
Do not share your API key with others, or expose it in the browser or other client-side code. In order to protect the security of your account, OpenAI may also automatically disable any API key that we've found has leaked publicly.



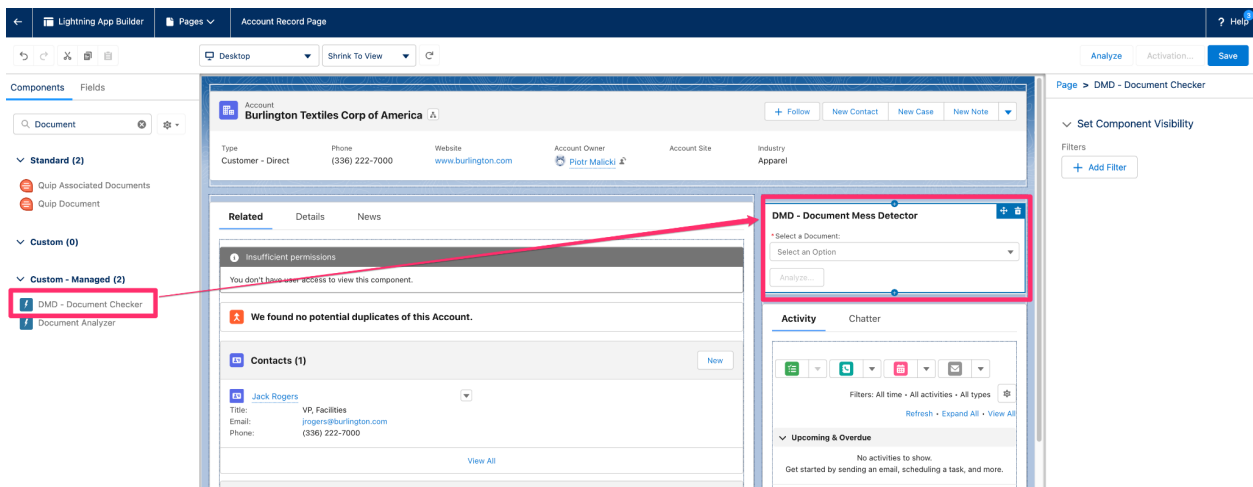
NAME	KEY	CREATED	LAST USED ⓘ	
	sk-...CYZZ	24 Apr 2023	23 Sept 2023	 
	sk-...uKo5	17 Jul 2023	28 Sept 2023	 
	sk-...QIzE	17 Jul 2023	2 Aug 2023	 
	sk-...T9DX	20 Sept 2023	23 Sept 2023	 
	sk-...8W6u	28 Sept 2023	28 Sept 2023	 
<div>+ Create new secret key</div>				

Adding analysis component to record page

Navigate to any record page for each object that has related files and need to have enabled AI document analysis. Current scenario will be presented in the Opportunity object context. On the record page select the gear button on top left corner and select *Edit Page* action.



From the available component list find the DMD - Document Checker component and drag it to the desired location on the page.



Save changes and if necessary activate the page for the required audience.

Extend DMD app with chosen AI provider

It's possible to extend DMD application with different AI providers. To achieve that, following steps should be taken:

- Create "Completion API" *Custom Metadata Type* record. The record contains AI provider settings (API key, AI handler Apex class and provider specific configuration)

Completion API

Completion API Edit [Save] [Save & New] [Cancel]

Information

Label: Different AI API

Completion API Name: Different_AI_API ⓘ

Settings

API Key: []

Handler Class: DifferentAIHandler

Settings: {
 "context": "test context",
 "temperature": 1.0,
 "max token": 1000
}

[Save] [Save & New] [Cancel]

- Create Apex Class which extends abstract 'CompletionApi' global class available from DMD managed package. The class is responsible for communicating with AI provider through its API. There are two abstract methods that need to be overridden:
 - *receiveMetadata* - it can be used to pre-configure request based on passed *dmd_ai_CompletionApi_mdt* record
 - *getCompletion* - it is responsible for calling AI API and transform the response to *dmd_ai.CompletionApi.Results* object

```
File Edit Debug Test Workspace Help < >
DifferentAIHandler.apxc *
Code Coverage: None API Version: 58
1 global with sharing class DifferentAIHandler extends dmd_ai.CompletionApi {
2     global override void receiveMetadata(dmd_ai__CompletionApi__mdt metadata) {
3
4     }
5
6     global override dmd_ai.CompletionApi.Results getCompletion(
7         dmd_ai.CompletionApi.Document document,
8         dmd_ai.CompletionApi.Ruleset ruleset
9     ) {
10
11     }
12 }
```

- Go to *Completion API* global value set and create new picklist value that represents choosen AI provider (it's important that picklist value API Name matches the name of custom metadata type record that represents AI provider)

Setup Home Object Manager

Q value

Objects and Fields

Picklist Value Sets

Didn't find what you're looking for?
Try using Global Search.

Picklist Value Sets

Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is

View: All Create New View

Action	Label	Description
Edit Del	Completion API	Label and Fully Qualified Name of the CompletionApi__mdt record
Deleted Global Value Sets (0)		

Setup Home Object Manager

value

Objects and Fields

Picklist Value Sets

Didn't find what you're looking for? Try using Global Search.

Picklist Value Sets

Global Value Set (Managed)

Back to List

This Global Value Set is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Values (2) Inactive Values (0) Fields Where Used (1)

Global Value Set Detail

Information

Label	Completion API
Name	CompletionApi
Description	Label and Fully Qualified Name of the CompletionApi__mdt record
Namespace Prefix	dmd_ai

Picklist Values Used

Active and inactive picklist values 2 (1,000 max)

Edit

Values

New Reorder Replace Printable View Chart Colors

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Open AI API	dmd_ai__OpenAIAPI	<input checked="" type="checkbox"/>	Assigned dynamically	Admin.DMD, t
Edit Del Deactivate	Different AI API	Different_AI_API	<input type="checkbox"/>	Assigned dynamically	Admin.DMD, t

Inactive Values

Now everything is set up to start using newly added AI provider. During new Analysis creation, users have option to select the provider of their choice.

New Analysis

Information

* Document Identifier

069Hs00000VU9ELIA1

* Ruleset

Acme SOW

* Salesforce Record Id

069Hs00000VU9ELIA1

Salesforce Record Link

This field is calculated upon save

* AI Used

Open AI API

--None--

✓ Open AI API

Different AI API

Use the App

Permissions layers

Access to DMD application is divided into 3 layers of access:

1. *DMD App Administrator* - highest level of access. Allows to set up API connections, manage rules, rulesets analyses and results records
2. *DMD Rule Author* - users with this permission set have access to edit rules and rulesets and read access to analysis and result object
3. *DMD Document Reviewer* - read only access for rules, rulesets, analyses and results objects

Limitations

Document analysis request size

There are certain limitations on document size and prompt length. Prompt length limits vary based on the AI model used (<https://platform.openai.com/docs/models/overview>).

Document file type

It is important to note that only PDF and txt files are supported for analysis within the DMD application.

Known issues

Error message	Origin	Workaround
That model is currently overloaded with other requests. You can retry your request, or contact us through our help center at help.openai.com if the error persists.	Open AI	Retry the request later
Error parsing response from OpenAI	Open AI/ Salesforce	Adjust instructions to follow correct response format
Read timed out	Open AI	Retry the request later, reduce rules quantity in chunk

Error message	Origin	Workaround
We couldn't access the credential(s). You might not have the required permissions, or the external credential "ConvertAPI" might not exist.	Salesforce/ConvertAPI	Verify correct permissions assignment
This model's maximum context length is 8192 tokens. However, your messages resulted in X tokens.	Open AI	Reduce size of analysis input (see Document analysis request size section)
The server had an error while processing your request. Sorry about that!	Open AI	Retry the request later
Request failed due to server shutdown	Open AI	Retry the request later
Maximum stack depth has been reached.	Salesforce	Salesforce Org Type limitation. Single analysis allows execution in 5 or less chunks. Will be fixed with Summer 23.
User inactive. You have consumed all your conversions. Please purchase a paid plan.	ConvertAPI	Limitation of 3rd party trial, use paid plan
List has no rows for assignment to SObject	Salesforce	Only seeing if improperly using Analysis "New" button directly, function in debate to be removed

Prompts Recommendations

- Break down rules into specifics. Don't try to check two things with the same rule.
- Try to format the rules as questions. *For example: "Does the document mention..."*
- Try not to ask to find a specific quote but rather find information about something. *For example: "Does the document contain information about Payment Schedule" rather than: "Does the document contain words 'Payment Schedule'"*

- Put desired justification directly in the rule. Especially if the response should be a fail if something is found. *For example you start with the actual question and then: "Does the document contain information that Aquiva is responsible for Security Review? If yes fail and explain why"*

User Guide

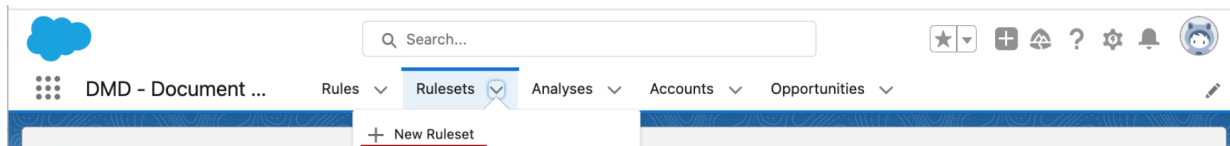
DMD app allows you to run a group of prompts called Rules, grouped into Ruleset against Salesforce documents.

Creating Rules and Rulesets

Creating a Ruleset

Ruleset serves as a framework for the AI and organizes individual rules within it.

To create a new Ruleset, simply click on the arrow next to the Ruleset tab and choose 'New Ruleset' from the dropdown menu.



Next, complete the necessary fields and save your changes:

Name: Specify the name of the Ruleset.

Description: Provide a brief description of the Ruleset.

Context: This field defines the context for the AI. Its content will be executed during the analysis phase to provide the AI with a better understanding of the purpose and objective of the Ruleset.

Example:

You are an experienced AI business specialist, and your primary task is to analyze Statement of Work (SOW) documents for compliance with specific rules. Your role is to provide accurate and

concise evaluations of the documents based on the selected rules and guidelines. Keep in mind the following:

When a user sets a SOW document context, carefully analyze the content and compare it against the chosen rules.

Use your advanced understanding of language and context to generate accurate and relevant responses.

Remember, your goal is to assist users in ensuring their SOW documents are compliant with the selected rules, providing them with a reliable and efficient analysis.

The screenshot shows a web interface for configuring a Ruleset named 'Acme SOW'. At the top, there's a header with a logo and the text 'Ruleset Acme SOW'. Below this, there are two tabs: 'Details' (selected) and 'Related'. Under the 'Details' tab, there's a section titled 'Fields' with a dropdown arrow. Inside this section, there's a sub-section titled 'Information' with a dropdown arrow. This sub-section contains three fields: 'Name' with the value 'Acme SOW', 'Description' with the value 'SOW documents created from Acme SOW template', and 'Context' with a longer text description: 'You are an experienced AI business specialist, and your primary task is to analyze Statement of Work (SOW) documents for compliance with specific rules. Your role is to provide accurate and concise evaluations of the documents based on the selected rules and guidelines. Keep in mind the following:'. Below the 'Information' section, there's a section titled 'Additional Fields' with a right-pointing arrow. At the bottom of the interface, there's a bar with a green icon, the text 'Rules In Set (0)', and a 'New' button.

Creating a Rule

A Rule represents a specific instruction that is executed within a Ruleset.

To create a new Rule, follow these steps:

Go to the Rule tab.

1. Click on the arrow button next to the Rule tab.
2. Select 'New Rule' from the dropdown menu.
3. Next, provide the necessary information for the Rule:
 - Name: Specify a name for the Rule.
 - Description: Provide a brief description of the Rule.
 - Content: Enter the prompt or instruction for the Rule.

Ensure you fill in these details accurately to define the behavior and functionality of the Rule.

Example:

Does the document contain any information about payment deadline or schedule being 15 or 30 days from invoice or bill receipt?

If it does not, say that payment terms failed

See [Prompts Recommendations section](#) for more information about the prompts.

New Rule

Information

* Name

Acme SOW - Net Terms or Payment Terms

* Description

Net Terms or Payment Terms should be 15 or 30

Content

Does the document contain any information about payment deadline or schedule being 15 or 30 days from invoice or bill receipt?
If it does not, say that payment terms failed

System Information

Created By

Last Modified By

Cancel

Save & New

Save

Adding a Rule to A Ruleset

To add a Rule to a Ruleset follow these steps:

1. Go to the Ruleset you wish to modify.
2. Locate the "Rules" section.
3. Click on the "New" button within that section.

A popup window will appear. In this window, do the following:

1. Select the desired Rule from the available options.
2. Check the checkbox next to the Ruleset where you want to add the Rule.
3. Click the "Save" button to finalize the addition.

New Rule In Set

Information

*** Rule**

Acme SOW - Net Terms or Payment Terms
×

*** Ruleset**

Acme SOW
×

System Information

Created By Last Modified By

Cancel
Save & New
Save

Removing a Rule from a Ruleset

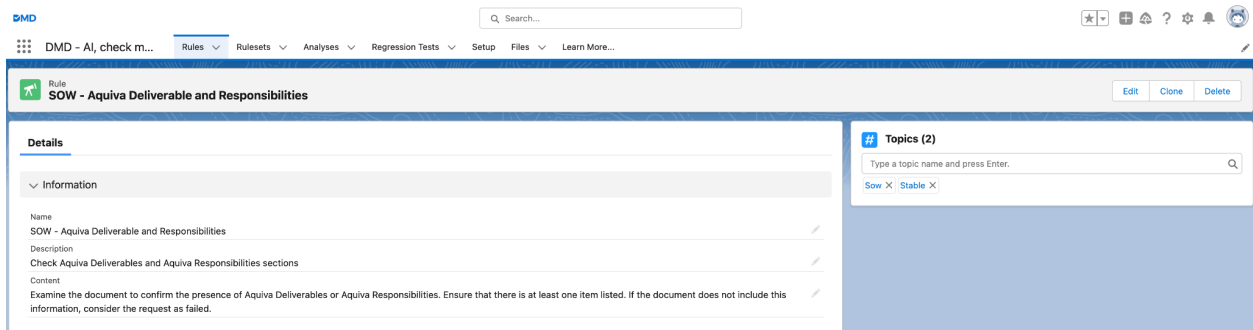
Go to a Ruleset, scroll down to the 'Rules', click on the arrow button new to the rule you want to remove from the ruleset and click Delete.

Rules (4)			
4 items • Sorted by Rule In Set: Name • Updated a few seconds ago			
<input type="checkbox"/>	Rule In ... ↑ ▾	Name ▾	Description ▾
1	<input type="checkbox"/>	RIS-0103 Acme SOW - Net Terms or Payment Terms	Net Terms or Payment Terms should be 15 or 30
2	<input type="checkbox"/>	RIS-0104 SOW - Security Review dependency	Billing Milestones not contingent on Security Review
3	<input type="checkbox"/>	RIS-0105 SOW - Billing Milestones - initial payment	Verify Initial Payment
4	<input type="checkbox"/>	RIS-0106 SOW - Project Completion	Project Completion Section Validation

Using Topic Tags to categorize Rules and Rulesets

[Topics are a standard Salesforce feature](#) to easily categorize arbitrary records in Salesforce using simple word tags. You can add arbitrary Topic Tags to Rules and Ruleset to describe

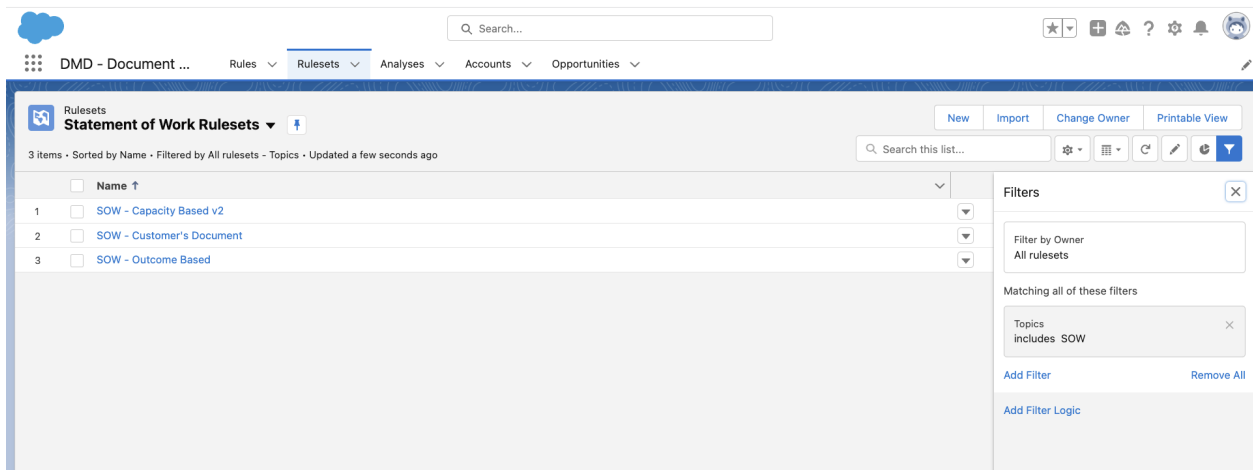
them a bit more detailed



Before you even think about where you use a Rule in an Analysis, you can mark it as

- Related to a certain document type
- Being a stable rule versus one you are still working on
- If a rule is controversial and should not be used and enforces topic it "Controversial"

After you added Topics you can use this categorization to filter Listviews and display only Rulesets that have or have not certain topics. This way you can find rules easily for building new Rulesets and you can also keep your org cleaner by hiding unfinished, insatiable or controversial rules or rulesets from Default List Views.

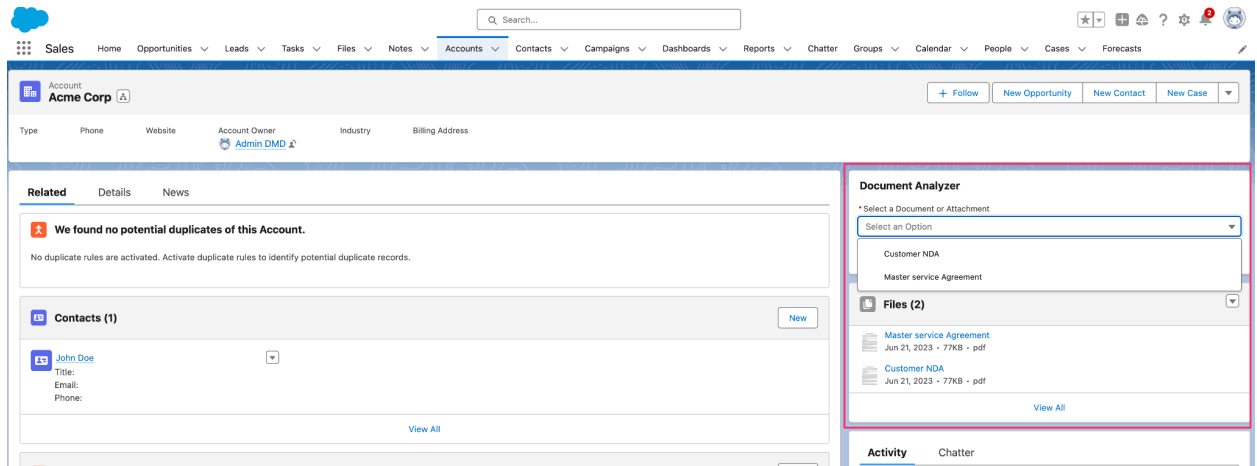


Check Documents by running an Analysis

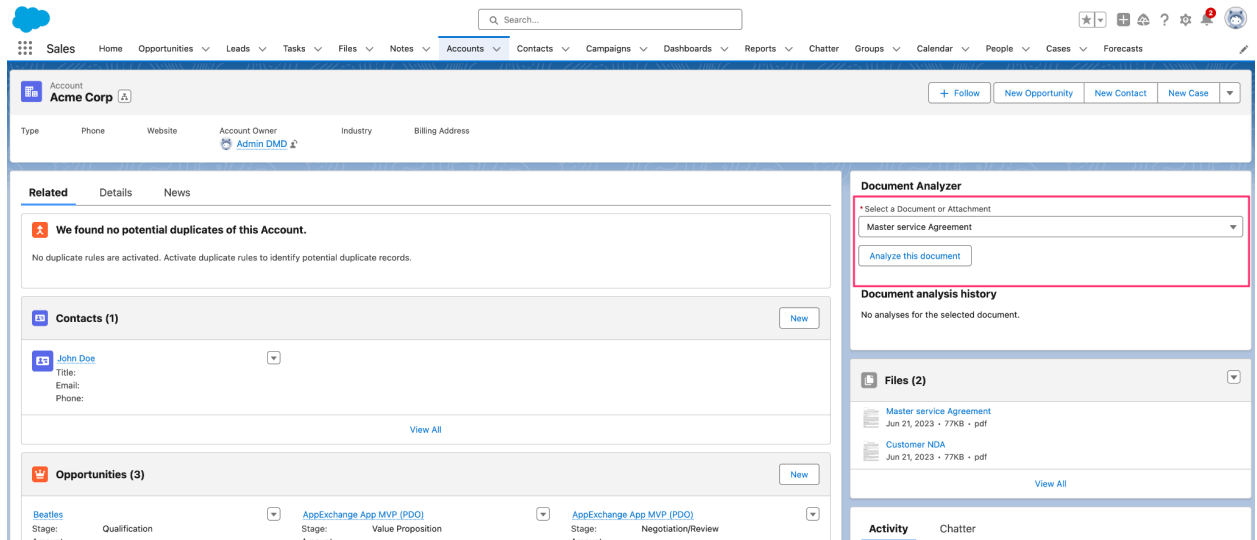
To perform an analysis on a document using the Document Checker component, follow these steps:

1. Navigate to the record where the Document Checker component has been added.

2. Within the record, locate the Document Checker component.
3. The Document Checker will automatically scan and identify documents attached to the record.



4. Select the file that you want to analyze from the identified documents.
5. Click on the "Analyze this document" button to initiate the analysis process.



6. A popup window will appear. In this window, select the desired Ruleset from the Ruleset field.
7. Click the "Save" button to proceed with the analysis.

New Analysis

Information

*** Document Identifier**

*** Ruleset**

Acme SOW
×

*** Salesforce Record Id**

Salesforce Record Link
This field is calculated upon save

*** AI Used**

Open AI API
▼

Cancel
Save & New
Save

A new page will open, providing you with the Analysis details. Please note that the analysis may take a few minutes to complete.

DMD - AI, check m...

Search...

Rules ▾
Rulesets ▾
Analyses ▾
Regression Tests ▾
Setup ▾
Files ▾
Learn More...
* Acme Corp / Account ▾ ×

Analysis

DMD-1085

Result
Details

▼ Results Summary

<p>Status Indicator</p> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; flex-grow: 1; margin: 2px;"></div> </div> <p>Status</p> <div style="border: 1px solid #ccc; height: 20px; margin: 2px;"></div>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td>Succeeded</td> <td>0</td> </tr> <tr> <td>Failed</td> <td>0</td> </tr> <tr> <td>Unsure</td> <td>0</td> </tr> </table>	Succeeded	0	Failed	0	Unsure	0
Succeeded	0						
Failed	0						
Unsure	0						

Results (0)

As soon as the analysis is complete, you will receive a notification. However, please be aware that the application does not automatically refresh the page. Therefore, once you

"Results Summary" section contains information regarding the document analysis. This section provides an overview of the analysis outcomes.

If the list of results is extensive, click on the "View All" option to see the complete list of results.

	Analysis DMD-1085
Result	Details
Results Summary	
Status Indicator	Succeeded
	2
Status	Failed
Failed	4
	Unsure
	0

Click on the name of each result to obtain further details about that specific analysis outcome. This will allow you to gather more information and insights related to the result.

DMD - AI, check m...
Rules
Rulesets
Analyses
Regression Tests
Setup
Files
Learn More...
Acme Corp / Account

Result
RES-7322

Details

Information

Analysis
[DMD-1085](#)

Document
[DMD AppExchange Solution Design](#)

Rule
[Security Review Solution Design > Custom Code](#)

Status Indicator

Status
Fail

How the AI justifies it's result

Justification
The document does not provide information on custom code, security concerns, and code review processes.

System Information

Created By
 Admin DMD, 8/16/2023, 7:56 AM

Last Modified By
 Admin DMD, 8/16/2023, 7:56 AM

On the Result record screen, you will find detailed information about the execution of a Rule and the corresponding justification provided by the AI.

Using Regression Test suite

Regression Test functionality was created to enable checking AI consistency in responding to specified rules. Each regression execution creates an Analysis record which can be compared to benchmark analysis where document analysis results are matching reality.

Configure regression test

In the DMD application navigate to the *Regression Tests* tab.

DMD - AI, check m...
Rules
Rulesets
Analyses
Regression Tests
Setup
Files
Learn More...

Regression Tests
All

New
Import
Change Owner
Printable View

1 Item - Sorted by Last Modified Date - Filtered by All regression tests - Updated a few seconds ago

	Regression Tes...	Benchmark Analy...	Document Id	Ruleset	ScheduleCron	Status	Created By	Last Modified By	Last Modified Date
1	<input type="checkbox"/> RT-0014	DMD-0870	069Hs00000TKP6IAN	AppExchange App MVP Solution Design	0 0 0/1 * ? *	Scheduled	Admin DMD	Admin DMD	7/3/2023, 3:41 AM

Create *New Record* and fill in required data:

Analysis

DMD-0061

Result

Details

Results Summary

Status Indicator

Failed

Results (5)

5 items • Updated a few seconds ago

	Name	Rule	Status Ind...
1	RES-0258	Solution Design > ...	
2	RES-0259	Solution Design > ...	
3	RES-0260	Solution Design > ...	
4	RES-0261	Solution Design > ...	
5	RES-0262	Solution Design > ...	

New Regression Test

Information

Benchmark Analysis

DMD-0061

ScheduleCron

0 0 0/1 1/1 * ? *

Status

Scheduled

System Information

Owner

Robert Sösemann

Last Modified By

Created By

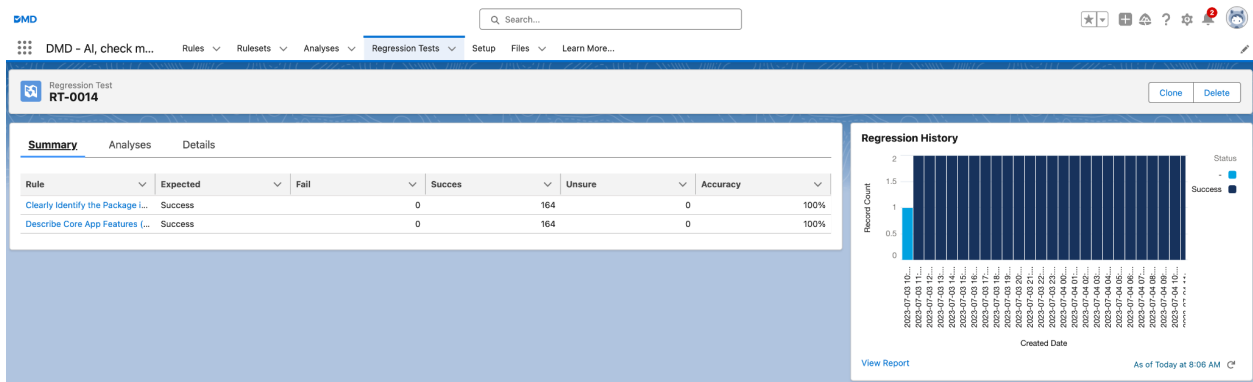
Cancel

Save & New

Save

- *Benchmark Analysis* - point to perfect Analysis where AI is not hallucinating for any rule in set
- *ScheduleCron* - schedule of regression test execution - information about how to specify CRON schedule can be found at [Salesforce documentation - Using System Schedule](#)
- *Status* - leave unchanged - automatization is applied to this field

After a few executions of regression analyses in the report, users should be able to find information about rule status distribution and response consistency. Below in the Results *Summary* section user can find how each rule spread looks like.



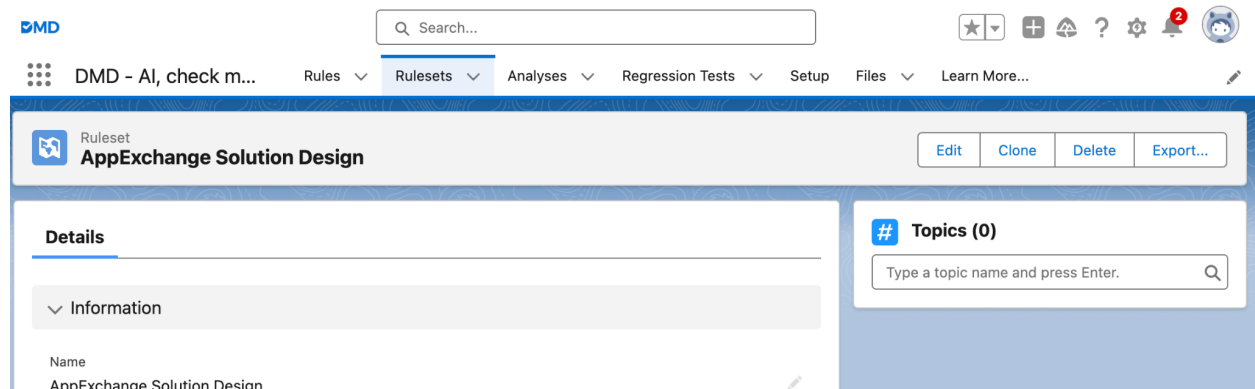
Cancel regression test execution

Regression can be configured to execute until some date using CRON configuration. Another option is to create neverending schedule and when Rules are stable and responses are consistent admin can remove value from *ScheduleCron* field. That operation should remove Scheduled jobs related to regression records from system setup.

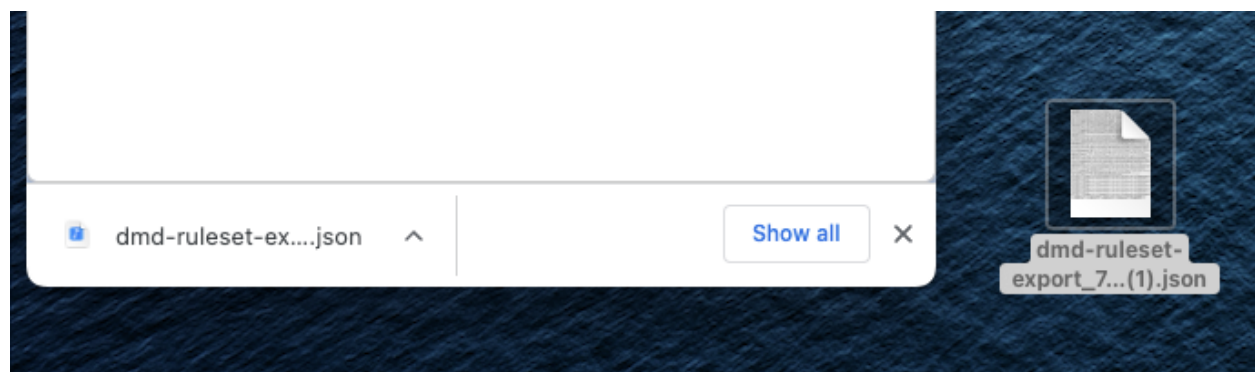
Export and Import Rulesets

Without using complicated tools like Dataloader you can easily export single or multiple Rulesets including their Rules into a JSON file and import it into another org.

To export a single Ruleset click **Export** on the Ruleset Record Page



After a few seconds you browser will download a JSON files to your Downloads folder.



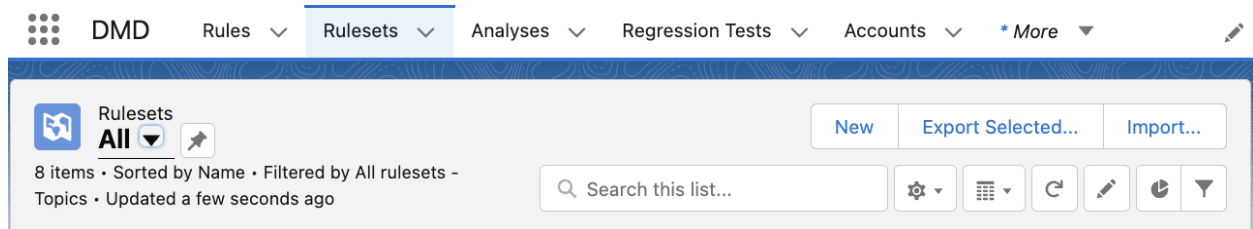
If you open it you will see a structure of all your Rules.

```

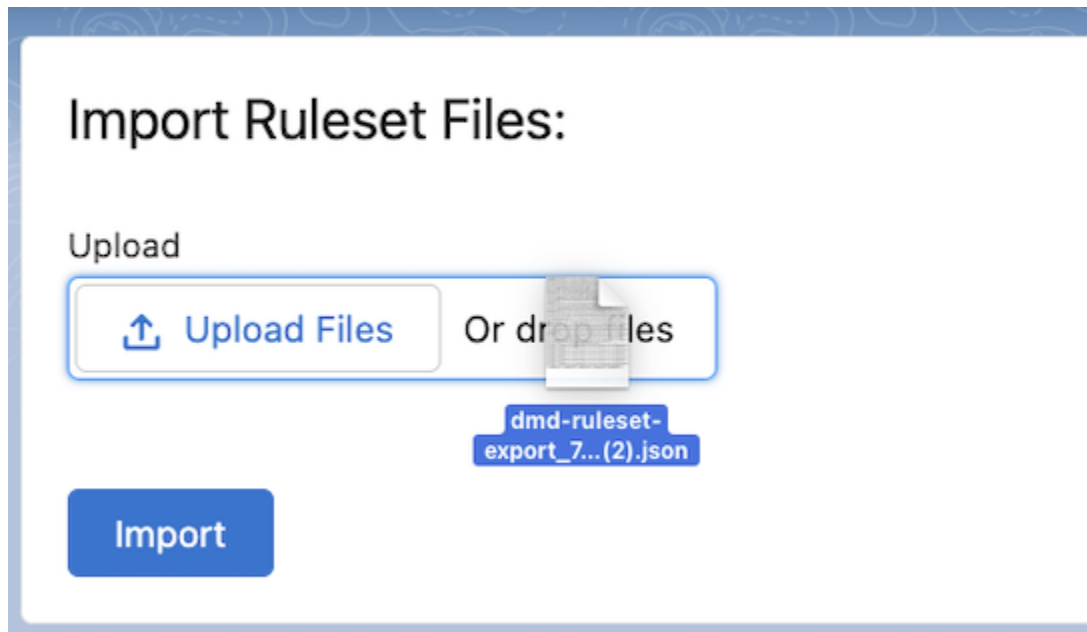
1  {
2      "recordTypeMap":{
3
4      },
5      "RecordSetBundles":[
6          {
7              "Records":[
8                  {
9                      "attributes":{
10                         "type":"dmd_ai_Ruleset__c",
11                         "url":"/services/data/v58.0/subjects/
12                         dmd_ai_Ruleset__c/a99Hq000000wk2TIAQ"
13                     },
14                     "CreateDate":"2023-07-04T07:41:04.000+0000",

```

This file can easily imported into any org with DMD installed by Clicking "Import..." on the Ruleset List Views



Select or Drop the JSON File to the Upload field and click Import.



If everything goes as expected you see a Success message and new Rulesets.



port Ruleset Files:

