**Vlocity Intelligence**

*Vlocity Intelligence* is a system composed of Resources, Attributes, and Intelligence Machines. A Vlocity Intelligence Machine reviews the attribute profile data from Contacts, Accounts, Interactions, or any standard or custom object, and applies learning algorithms to that data to determine the most appropriate resources to present to your clients.

You can add any important item you want to present to your customers as an Intelligence Resource.

Resources can be OmniScripts, help articles, documents with promotional content, and more. After a user views the Resource, the user can accept or reject it. Vlocity Intelligence ranks the User Profile Attributes which are likelier to accept or reject certain Intelligence Resources based on the Views, Accepts, and Rejects of the Intelligence Resource's Profile Attributes.

**Get Started with Vlocity Intelligence**

To get started with Vlocity Intelligence, you must determine what you want your customers to see based on which characteristics customers have.

1. First, determine which items you want to get in front of your clients, such as products, offers, knowledge articles, OmniScripts, documents, *etc*. These items are added to your Intelligence
2. Next, consider what attributes apply to the audience you are targeting and what resources you’re trying to deliver to them. Even if your theory ends up being incorrect, Vlocity Intelligence is smart enough to learn from the real-life responses and adapt by applying the correct attributes to the resource or object.

For example, your company might want to run a promotion offering clients tickets to sporting events. To get started, add the games that you are offering.

1. After you, Add New Intelligence Resources, determine which tickets to offer to which clients. You decide to offer tickets based on the client's favourite sports and where the client lives.
2. Next, Add a New Attribute Category for Favourite Sport, and one for Location. The Vlocity Intelligence Machine reviews the attributes for the client and displays the best tickets for a client based on those attributes. If a client's favorite sport is Basketball and the client lives in the Bay Area, offer them the Warriors Tickets resource, which shares the Basketball and Bay Area attributes. However, if the client's geographic region is Los Angeles County, offer them the Lakers Tickets resource.

**Add New Intelligence Resources**

*Intelligence Resources* are items of value that you want to get in front of your target, such as promotional content, products, help content, new offers, and OmniScripts. When calling the Vlocity Intelligence API, the resources are what gets ranked and returned.

To add Intelligence Resources, go to the Vlocity Intelligence Resources tab and click the New button.

The Target Object Type and the Target Object Key determine where the link of the resources goes when it is clicked. For example, If you use Vlocity Action, the Target Object Type is VlocityAction and the Target Object Key is the action's name. If the resource is a Product, the Target Object Type is Product2 and the Target Object Key is the record ID of the Product.

By choosing "Query" for the Data Source, you can create a Virtual Resource. Virtual Resources function as a single resource that can load additional records based on the specified query. The query is defined under the resource's Data Source, and supports the use of merge fields, for example, Select Name, Id,

CustomField\_\_c from Product2 where CategoryCode like '%ProductCat%'.

Resources can be active or inactive, so if you have time sensitive or seasonal promotions, you can mark them inactive when they are no longer offered. These dates can be specified using Effective Date and Expiration Date.

After creating the resource, you can view and edit details from the resource's page. This page enables you to edit the appearance of the resources that display on the Card Layout.

**Use Vlocity Actions with Vlocity Intelligence Resources**

To determine the steps to be taken after the resource is viewed, use Vlocity Actions with the Vlocity Intelligence Resources. Next steps can include launching an OmniScript, visiting an external page, viewing a product detail page, or executing code.

When you Add New Intelligence Resources, the Target Object Type and the Target Object Key specify where the link of the Resources goes.

**Vlocity Actions**

Vlocity Actions are automatically generated URLS that launch Vlocity OmniScripts, Vlocity Cards components, web pages, or external applications. Actions are typically specific to a given object type, such as Account, Contact, Policy, or Asset.

The Vlocity Action API returns all the Actions that are associated with an object. The display text, icons, and links can be displayed to enable the user to invoke the Action in the object context.

**Add Profile Attributes**

For Vlocity Intelligence to function, you must apply attributes that characterize profiles. For example, a target might have the Profile Attributes of High Net Worth, Art Collector, and Theft Concerns.

Based on these attributes, the Vlocity Intelligence Machine can determine that they are the perfect candidate to attend a seminar on insuring fine art pieces.

You can apply Profile Attributes in the following ways:

* Manually Add Attributes to Any Object.
* Import using APIs.
* Use Attribute Assignment Rules to automatically add attributes based on specified criteria.

The type of attribute is defined at the Attribute Category level. Attributes Categories must created before you can add attributes to the category. Typically, Profile Attributes are used with Vlocity Intelligence and can be automatically assigned

Attributes can be Product Attributes or Profile Attributes. Product attributes are used with Policy Product Management.

**Create New Profile Attributes**

Attributes act like tags that provide more information about the entity in the profile. Typically, Profile Attributes are used with Vlocity Intelligence and can Use Attribute Assignment Rules. Product attributes are used with Policy Product Management.

The type of attribute is defined at the category level. You must have an existing Attribute Category to add the new attributes to.

**Create a Vlocity Intelligence Machine**

**Add a Vlocity Intelligence Machine**

After you Come Up With Your Plan, Add New Intelligence Resources, and Add Profile Attributes, you can create your Intelligence Machines from the Vlocity Intelligence Machines tab. Click on the New button, and enter a name for the machine and a unique name in the REST Resource Name. The REST Resource

Name will be used in generating an APEX REST endpoint.

After the new machine is added, you can associate the appropriate resources and attributes with this machine.

You can specify the attribute categories that have the highest impact on the rating of the resources to be displayed. For more information on how category weight determines which resources are displayed,

**Rank Intelligence Resources**

Resources are scored based on the number of matching Target Profile Attributes between the object or interaction and the Resource. The Category Weight of each Attribute is added to the score for each match.

For example, if you increase the Category Weight for an Attribute Category called Phone Manufacturer that contains attributes like Apple, Android, or Samsung, the resources with attributes in that Attribute

Category have a greater impact on the overall score.

**Add Attributes Automatically Using Attribute Assignment Rules**

*Attribute Assignment Rules* enable profile attributes used in Vlocity Intelligence Machines to be added or removed automatically when certain conditions are met. For example, you can create a High Net Worth attribute that is added when a person’s portfolio exceeds $500,000 or an At-Risk Client attribute that is

added when a client opens more than three support cases during a month.

**Types of Attribute Assignment Rules**

There are three types of Attribute Assignment Rules: Formula, Field, and Tracking Formula.

* Use *Formula* rules with formulas that includes data from the object record being processed. For more information, see Use Formulas With Attribute Assignment Rules.
* Use *Field* rules when setting the attribute value to the specified field's value on the SObject Record being processed. For more information, see Use Field Values With Attribute Assignment Rules.
* Use *Tracking Formula* rules when a formula includes VlocityTrackingEntry\_\_c data that is related to the Salesforce object that is being processed. Tracking Formulas can be used to apply an attribute in response to actions taken during a Vlocity Interaction. For more information, see Vlocity Intelligent Interactions.

**Use Field Values With Attribute Assignment Rules**

Use Field Attribute Assignment Rules when applying data from an account to its attributes. For example, to apply the Billing State of the Account to an attribute called "State," set the Service of your Attribute Assignment Rule to:

BillingState

Use Formula Type Attribute Assignment Rules

Formulas support comparisons and basic math operations performed on matrix lookups.

Formulas support the following operators:

* &&
* AND
* ||
* OR
* >
* >=
* <
* <=
* =
* ==
* !=
* <>
* LIKE
* NOT LIKE
* +
* -
* \*
* /
* %
* ^

Formulas support the following functions:

* ABS
* AVG
* COUNTQUERY
* IF
* MAX
* MIN
* QUERY
* SUM

All tokens in the formula, except ones in quotation marks, must be separated by a space, including parenthesis and commas.

Variable names in formulas cannot contain spaces. Replace spaces with underscores. For example, change "Last Name + ',' + First Name" to "Last\_Name + ',' + First\_Name"

To add the Medicaid Eligible attribute to a contact if they are 65 or older, use the following formula when creating your Attribute Assignment Rule:

Age >= 65

To change the contact's Market Segment attribute to Super Affluent if the income field is from $250,000 to $500,000, use the following formula when creating your Attribute Assignment Rule:

AnnualIncome >= 250000 && AnnualIncome <= 500000

To mark accounts that have a sum of order greater than 100,000 as a Key Client, use the following formula when creating your Attribute Assignment Rule:

SUM ( CompletedOrders , OutstandingOrders) >= 100000

To identify a client with a brand preference, use the following formula when creating your Attribute

Assignment Rule:

AssetType == "Phone" && Manufacturer LIKE "Apple"

You can apply Apple as an attribute and modify the impact that attribute has on certain resources where

brand is a factor. For more information, see Ranking Intelligence Resources.

**Vlocity Intelligent Interactions**

Vlocity Intelligent Interactions help you make the smartest choices for your clients based on the interactions you have with them. Because Intelligent Interactions are based on live feedback from the client, the resulting offers update quickly, according to the conversation that you are having with your client.

Vlocity Intelligent Interactions use a Tracking Formula type for Attribute Assignment Rules. Tracking Formulas have the same syntax as Assignment Rules, but your Tracking Formula checks the related Tracking Entries for the Salesforce object.

A tracking entry is the record of a single action that occurs during a Vlocity Interaction.