



HANDS-ON WITH EINSTEIN BOT BUILDER

FIELD GUIDE

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FIELD GUIDE



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Welcome

During today's workshop, you'll be blazing a trail to happy customers and agents on the world's #1 customer service platform. Our Service Cloud trail guides will lead you down a path to faster, smarter customer service. You'll explore the intelligent customer service technology behind Einstein Bots that drives agent productivity and customer satisfaction.

YOUR OWN CAMPFIRE ENVIRONMENT

Today you'll create a **Salesforce Developer Edition** environment (we call it an 'org') of your own. Don't worry, you don't need to be a developer to complete this workbook. It's just an environment for us to try out some Salesforce capabilities and experiment a little. You'll even be able to log in to your trial org when you're back at work so that you can show your friends!

DISCOVER YOUR EUREKA! MOMENT

We all want to save money and drive our businesses forward. Today you'll explore the numbers and see how far Service Cloud can take you by uncovering the biggest **value drivers** for your business.

LEARN HOW TO KEEP EXPLORING

And finally, we'll give you a compass to guide your continued explorations along the Service Cloud trail. We'll introduce you to **Trailhead** - the fun way to learn Salesforce, where you can continue to blaze your trail with guided learning paths that chart your course through Salesforce skills.

We'll also introduce you to our **Success Community**, where Trailblazers like you can engage with and get answers from a passionate community of customers, partners, and Salesforce experts in groups including the ***Success with the Service Cloud*** group.

So, let's get started...

Trail 1: Sign Up and Setup

In this module, you'll create your own **Developer Edition** org that will be yours to continue using after you complete the Workshop.

We'll then guide you through an introduction to **Live Agent**, **Omni-Channel Routing** and the **Lightning Service Console**, where you'll see how easy it is to engage customers on your websites and mobile apps.

You are now going to use the dedicated **Service Setup** area, designed to make it fast and easy for admins to find key areas of Service Cloud to configure.

Let's get started by setting up the Live Agent chat channel and Omni-Channel Routing to deliver chats to agents if the bot is unable to help the customer.



Why is this important?

- Native Channel Support in Salesforce
- Native Omni-Channel Routing
- Fastest Way to Get Started
- Automatically Route Chats
- Embed Chat on Your Website
- Manage Agent Capacities

WHAT WE'LL BE WORKING ON

- Sign Up for a Developer Edition Org
- Set Up a Chat Queue
- Prioritize Chats with Other Work
- Configure Your Agent's Capacities

SIGN UP FOR A DEVELOPER EDITION ORG

1. Go to <https://developer.salesforce.com/signup> and follow the steps to sign up for your very own Service Cloud Trial org.

Note: Be sure to use an email address that you will be able to access now and throughout the event today, as you will need to verify your email address to complete the sign-up process.

For the **Username**, let's use:

yourlastname@bots-month-year.camp

The screenshot shows a web browser window with the URL <https://developer.salesforce.com/signup>. The page has a dark blue background with various white icons related to cloud computing, databases, and software development. On the left side, there is a large image of a computer monitor displaying a complex Salesforce dashboard with multiple charts, tables, and data visualizations. Below this image, several bullet points highlight features of the Lightning Platform: "Build apps Lightning fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". The right side of the page is a form titled "Get your very own Developer Edition". It includes fields for Name (Albert Einstein), Email (einstein@salesforce.com), Role (Developer), Company (Salesforce), Country (United States), Postal Code (94105), and Username (einstein@bots-november-2019.camp). At the bottom of the form, there is a checkbox with the text: "By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and agree that my data is subject to the [Privacy Statement](#), including use for marketing purposes." A large blue "Sign me up >" button is located at the bottom of the form. Below the form, a link says "Already have a Salesforce Developer Environment? Log In".

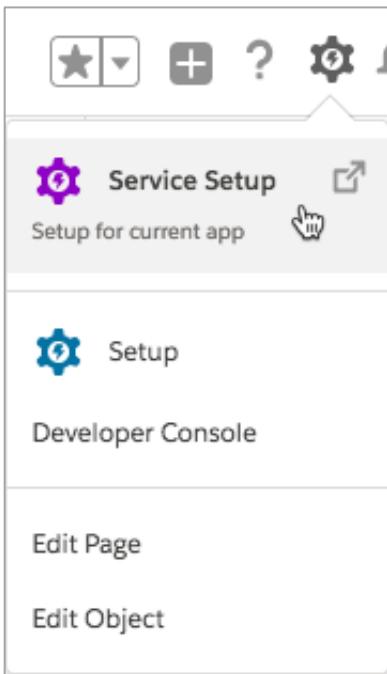
2. You will receive an email to verify your account. After you click Verify Account, you will be asked to create a password along with a security question.

The screenshot shows the Salesforce 'Change Your Password' interface. At the top is the classic blue cloud logo with 'salesforce' written in white. Below it is the title 'Change Your Password'. A message prompts the user to enter a new password for the email 'dmanbeck-m5ss@force.com'. It specifies that the password must have at least one character, one letter, and one number. There are three radio buttons for these requirements. Below this is a field labeled 'New Password' containing a single character 'l'. Next is a field labeled 'Confirm New Password' which is empty. Underneath is a section for a 'Security Question' with a dropdown menu showing 'In what city were you born?'. Below that is a field labeled 'Answer' which is empty. At the bottom is a large grey button labeled 'Change Password'. At the very bottom of the page, a small note states 'Password was last changed on 10/2/2017 7:53 AM.'

3. You'll then arrive at the Developer Edition **Welcome Mat**.

HANDS-ON WITH EINSTEIN BOT BUILDER

4. From **Setup Home**, navigate to the upper right corner of your screen, click on the cog and select **Service Setup**.



5. Find the **Recommended Setup** section and click the **View All** link in the upper-right corner.

The screenshot shows the Service Setup Home page. On the left, there's a sidebar with navigation links like 'Service Setup Home', 'ADMINISTRATION', 'PLATFORM TOOLS', 'AUTOMATION', and 'USER INTERFACE'. The main area has a title 'Service Setup Home' and a section titled 'Recommended Setup' with three cards:

- Add Your Users**: Adds your team to Service Cloud in this simple setup flow. [Get Started](#)
- Customize Case Status**: Track and streamline your agent caseloads. [Get Started](#)
- Email Setup**: Turn your emails into cases. [View All](#)
- Knowledge Setup**: Set up your Knowledge Base in Service Cloud.
- Lightning Communities Setup**: Build a community where customers help themselves.

6. A list of guided setup flows is displayed. These make it super fast to set things up in your environment.

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar and tabs for ALL, SETUP, and RESOURCES, with SETUP being the active tab. Below the tabs, there are three cards:

- Add Your Users**: Adds your team to Service Cloud in a simple setup flow. It features a user icon and the text "Add your team to Service Cloud in this simple setup flow."
- Attend Getting Started Webinars**: Finds a webinar that interests you and signs you up. It features a webinar icon and the text "Find a webinar that interests you and sign up!"
- Click to Customize**: Allows you to use the Object Manager to add fields, build layouts, and more. It features a gear icon and the text "Use the Object Manager to add fields, build layouts, and more."

Type **chat** in the Search box to find the Chat with Customers wizard and click it to add chat to your customer service arsenal.

The screenshot shows the Salesforce Setup interface with a search bar at the top. The search term "chat" has been typed into the search bar. Below the search bar, there is a single search result card:

- Chat with Customers**: Adds live web chat to your customer-service arsenal. It features a blue speech bubble icon and the text "Add live web chat to your customer-service arsenal."

7. Ok, let's get you connected with your customers! We'll use a guided setup to get Live Agent chat and Omni-Channel Routing ready for Einstein Bots. **Click Start.**

Chat with Customers

Chat with customers instantly

Connect with your customers wherever they are with live, web-based chat. With a click of a button (literally), your customers can get stellar support.



Start

8. Let's keep things simple and enter the name **Chat** for both your **Queue** and **Agent Group**. Don't forget to check the box next to your user so that you can test things out later.

Set Up Live Agent

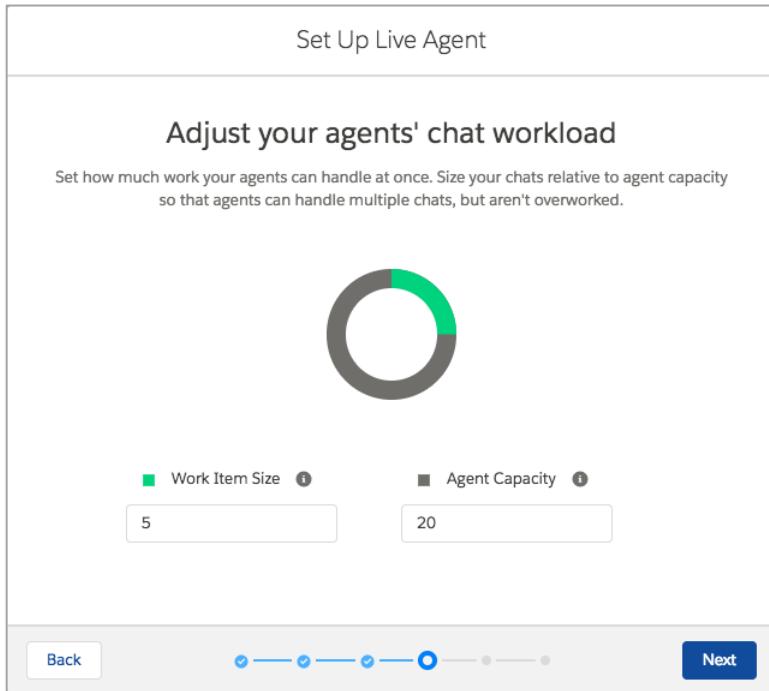
Create a queue for your chats

Queues hold incoming work items and route them to the best agent for the job. Set up a queue for your Live Agent chats.

Queue Name	Name This Agent Group <small>i</small>																
<input type="text" value="Chat"/>	<input type="text" value="Chat"/> 																
Live Agent Licenses 1 of 2 in use (1 new)	Service Cloud Licenses 1 of 2 in use (0 new)																
<input type="text" value="Search People..."/> 																	
1 item selected																	
<table border="1"><thead><tr><th>FULL NAME</th><th>TITLE</th><th>PHO...</th><th>EMAIL</th></tr></thead><tbody><tr><td> Admin User</td><td></td><td></td><td></td></tr><tr><td> Integration User</td><td></td><td></td><td>integration@example.com</td></tr><tr><td> Security User</td><td></td><td></td><td>insightssecurity@example.com</td></tr></tbody></table>		FULL NAME	TITLE	PHO...	EMAIL	 Admin User				 Integration User			integration@example.com	 Security User			insightssecurity@example.com
FULL NAME	TITLE	PHO...	EMAIL														
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 Integration User			integration@example.com														
 Security User			insightssecurity@example.com														
 Back	 Next																

1 —  2 —  3 —  4 — 

9. We need to decide how much of your agents' overall capacity should be consumed by each chat request. Most agents can handle 3 or 4 chats at a time, so let's just leave the default setting and click **Next**.



10. The next step is to decide which website you want to use to host your chat button. Don't worry, your Salesforce instance comes with a website we can use for today. You just need to give it a unique name.

Enter your company **Website URL**. For the **Salesforce Site Domain** use yourlastnamebotsyear.

Set Up Live Agent

Let's make chat work on your website

Website URL
Tell us where you want to put chat on your website. Be sure to include a protocol. ⓘ

Salesforce Site Domain
Connect a Salesforce site to your Snap-ins deployment. ⓘ
 .gus.force.com

I have read and accept the Salesforce site [Terms of Use](#)

[Back](#)  [Next](#)

11. Now we need to select which type of chats we'll be supporting. Let's select service.

Set Up Live Agent

What's your type?

Link chats with other objects in Salesforce to give you a full view of your chat visitors.



Sales
Link chats with leads.



Service
Link chats with cases and contacts.

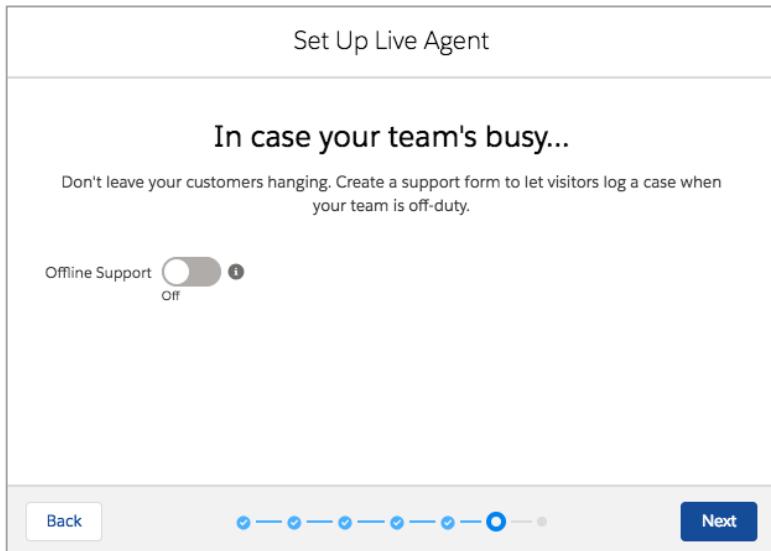


Just Contacts
Link chats with only contacts.

• — • — • — • — • — • — •

Next

12. Next, we have the option to provide a case creation form when agents are offline. We'll bypass this step for now (We can always change this later if we want).



13. The last screen of the wizard displays the code you would use to embed the chat button on your web pages. We don't need to do that today, so just click **Next**.

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14. When you're ready, you can click **Done** and get ready for the next section.

Chat with Customers

You're ready to chat

You just added web chat to your customer service channels. You're all set to chat with customers in the service console!

An illustration of two people in a workspace. One person, wearing a headset and glasses, is smiling and waving their hand towards a computer monitor. The other person, wearing a black hoodie, stands beside them with a friendly expression. A small potted cactus sits on the desk next to the monitor.

Don't stop here. Check out these helpful resources.

Give it a new look

Set colors, fonts, and more for your embedded chat in Setup.

[Let's Go](#)

Your next steps

Learn more about what you just set up and what else you can do to customize the chat experience.

[Let's Go](#)

Run again

Run this flow again to create another chat queue for another group of users on your team.

[Let's Go](#)

[Back](#)

[Done](#)

CONGRATULATIONS

You've just blazed a trail through Live Agent chat and Omni-Channel Routing! Chat has been activated in your Salesforce org, a simple routing configuration is in place and a Snap-in has been built for you so that you can quickly begin chatting with your bot. You now have everything ready to begin creating your Einstein Bot. Well done, trailblazer!



Continue your learning with more trails for Service Cloud in Trailhead:

- **Web Chat Basics**
<https://sfdc.co/WebChatBasics>
- **Omni-Channel Basics**
<https://sfdc.co/OmniChannelBasics>

Trail 2:

Build a Bot

OVERVIEW

First, what's a bot?

Technically speaking, a bot is “a computer program which conducts a conversation via auditory or textual methods.”

Thanks, Wikipedia...but bots are so much more:

- Bots are your allies in the race to resolve support cases fast. They can even prevent them from being opened in the first place!
- Bots reduce chat duration by helping customers self-direct immediately and resolving common issues without waiting.
- Bots save your agents time (and thus, your company money), allowing agents to devote more time to complex problem-solving and higher value customer interactions.
- Most importantly, bots can be trained to understand human language—and respond intelligently—through Natural-Language Processing (NLP).



Why is this important?

- Enable Bots in Minutes
- Built-in Pre-Chat Forms
- Integrated Admin Tools
- Simple Menu Driven Navigation
- Instantly Escalate to Live Agent
- Screen-pop Customer Profile

Housekeeping Check: Before we move forward, please close any extra console or browser tabs that opened during the previous module.

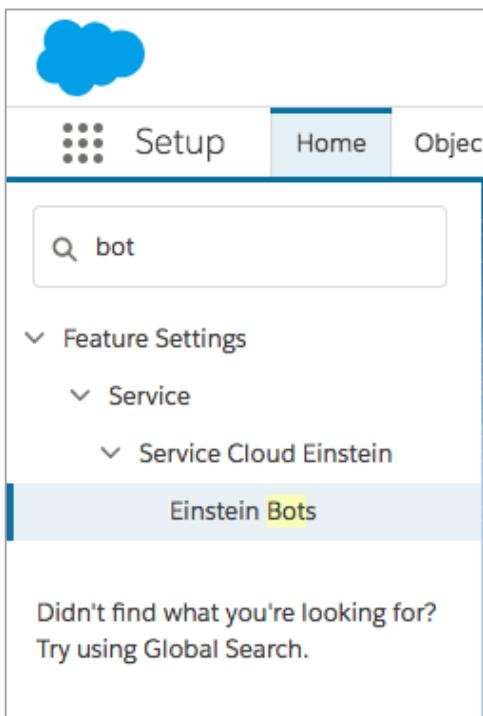
WHAT WE'LL BE WORKING ON

- Enable Einstein Bots
- Create an Einstein Bot
- Add Your Bot to a Chat Button
- Test Your Bot

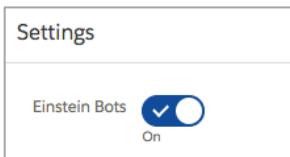
ENABLE EINSTEIN BOTS

Ok let's get going! Enabling bots is as simple as flipping a switch and checking a few boxes. Time to enable bots and some cool bot features to play around with.

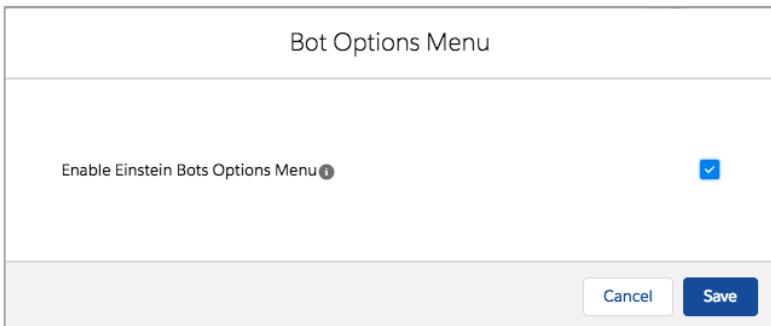
1. If you aren't already there, navigate to the upper right corner of your screen, click on the cog and select **Service Setup**.
2. Look for the Quick Find box in the upper left corner of your screen and search for the word **bot**. Click on **Einstein Bots** setup node.



- Now for the really hard part, slide the Einstein Bots switch to the **On** position.



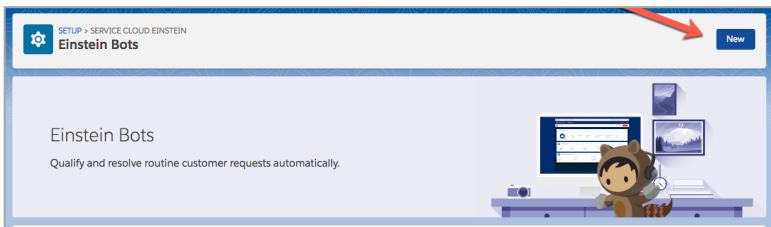
- Now we need to enable the Bots option Menu. This will allow your bots to present menu options to your customers.



CREATE AN EINSTEIN BOT

Let's begin on the **Einstein Bots** setup node- where you left off a moment ago.

- Click the **New** button in the upper right corner of the screen to launch the wizard.



2. The new bot wizard is the fastest way to get started with bots. It will do all of the heavy lifting for us, but we'll need to enter a few basic parameters to get going.



Welcome to the Einstein Bot Builder. Let's collect some information to get you started.

Together, we'll...

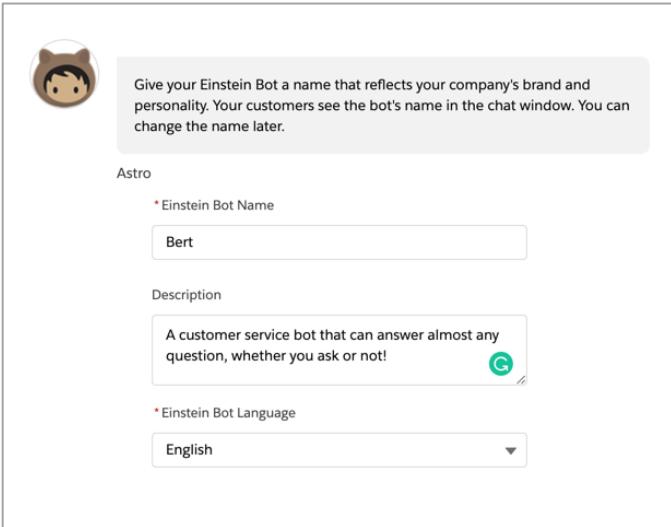
- Give your bot a name that reflects your company's brand, voice, and tone.
- Create a greeting to introduce your customers to your bot.
- Set up a main menu for common service needs.

When we're done, you'll continue working in the builder to finish your bot.

Ready? Let's go!

Astro

- To start, let's give your bot a name and a brief description of its main purpose. Pick a bot name and type in the description:
A customer service bot that can answer almost any question, whether you ask or not.



The screenshot shows the Einstein Bot Builder interface. At the top left is a circular icon of a cartoon character with brown hair and a white face. To the right of the icon is a text box with the placeholder text: "Give your Einstein Bot a name that reflects your company's brand and personality. Your customers see the bot's name in the chat window. You can change the name later." Below this is a section labeled "Astro" with a sub-label "Einstein Bot Name" and a text input field containing "Bert". Underneath is a "Description" section with a text input field containing "A customer service bot that can answer almost any question, whether you ask or not!" followed by a small green circular icon with a white letter "G". At the bottom is a "Einstein Bot Language" section with a dropdown menu set to "English".

4. Next, let's teach your bot some manners and create a welcome message to greet customers. Make sure to let them know they are chatting with a bot so your customers know they have officially arrived in the age of robotic artificial intelligence! Enter: **Hi! I'm <YOUR BOT NAME HERE>, your friendly customer service bot.**



Great. Now, how would you like Bert2 to greet your customers? We recommend that you identify your Einstein Bot by name and make it clear that it's not a human.

Astro

Einstein Bot Greeting Message

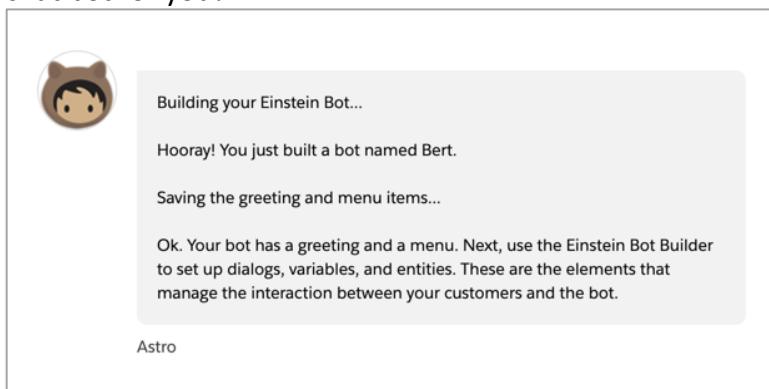
Hi! I'm Bert, your friendly customer service bot.

5. Your customers may not know what to do with all of the power and convenience that come with AI-driven bots. Create a menu to give them a sense for some of the things your bot can do for them faster and more conveniently than any other option. We'll be using the menu items in this example throughout the remainder of the workshop. Enter the following menu items:

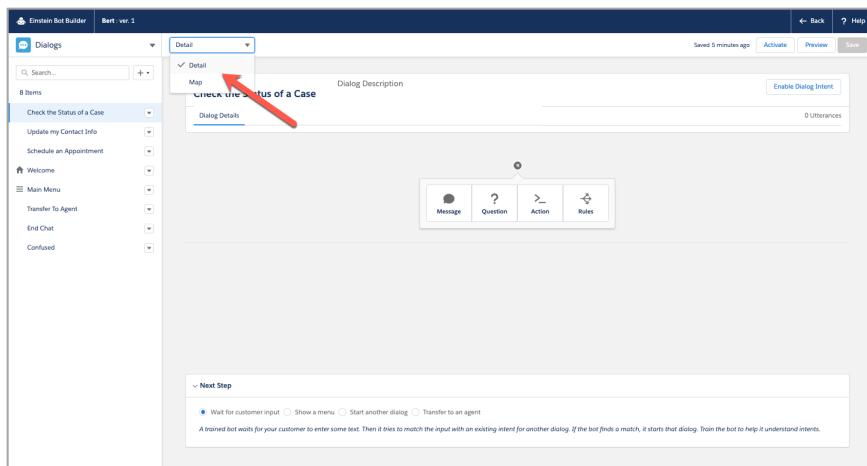
- 1. Check the Status of a Case**
- 2. Update my Contact Info**
- 3. Schedule an Appointment**

The screenshot shows the Einstein Bot Builder interface. At the top left is a circular profile picture of a character named Astro. To the right of the profile picture is a text box containing instructions: "Now, let's set up a menu for your customers. What are three common issues or questions that you want your Einstein Bot to handle? We'll make these into the bot's main menu. Some examples are Returns, Order Status, Billing, Hours." Below this text box is the name "Astro". Underneath the text box is a section titled "Main Menu Items" with a small info icon. This section contains three input fields, each labeled with a menu item name: "Menu Item 1" (containing "Check the Status of a Case"), "Menu Item 2" (containing "Update my Contact Info"), and "Menu Item 3" (containing "Schedule an Appointment").

- Now sit back and relax while the wizard magically creates the chat bot for you!

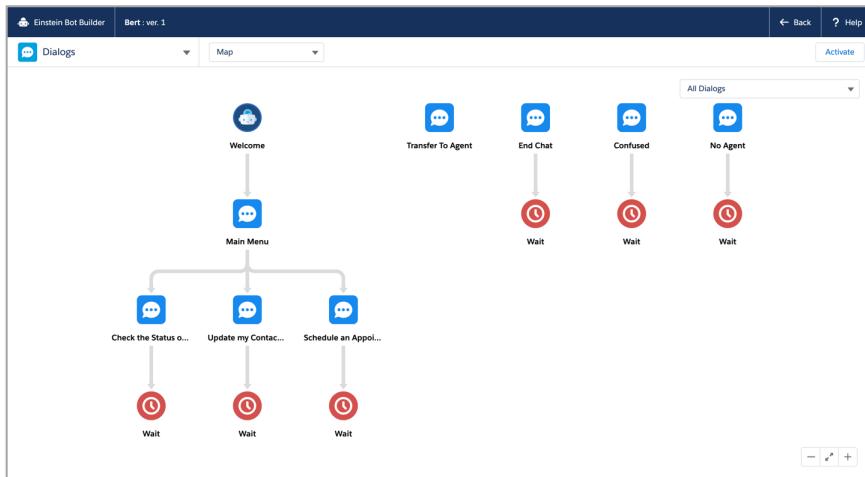


- After the wizard finishes, you're taken to the Einstein Bot Builder where you can see the Welcome message and Main Menu you created in the New Bot wizard. Use the drop-down list at the top to switch to the **Map** view.



- Map view makes it easy to see how all of the various Dialogs connect with one another to construct the perfect customer experience for your business.

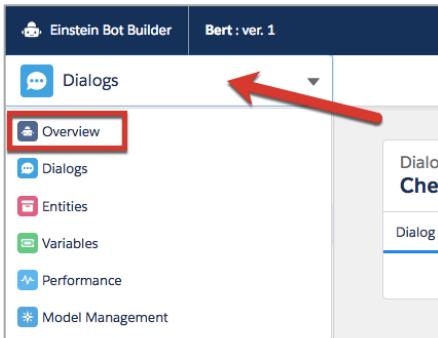
HANDS-ON WITH EINSTEIN BOT BUILDER



ADD YOUR BOT TO A CHAT BUTTON

One last step we need to complete before testing our bot is to connect it to the chat button we created in the previous trail.

1. To do that, click on 'Dialogs' in the upper left of the screen and select "Overview" from the drop down.



2. In the Channels area, Click Add, and select the ‘Chat’ channel we configured in the first trail. Select the ‘Chat’ deployment. Leave the Require Agent Online check box unchecked and click Save.

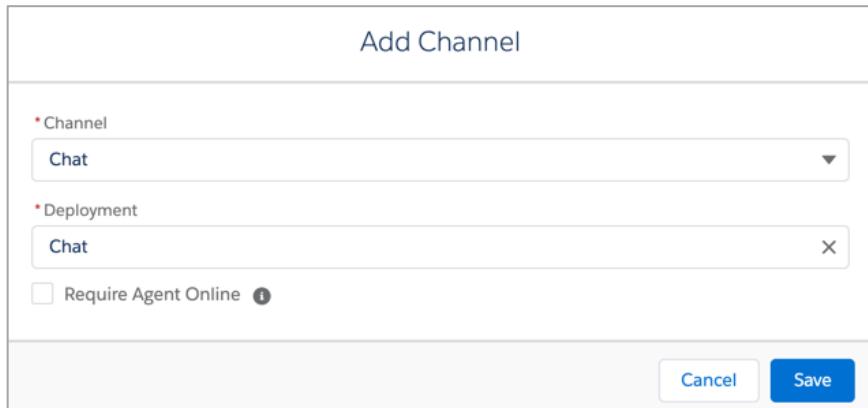
Add Channel

* Channel
Chat

* Deployment
Chat

Require Agent Online ⓘ

Cancel Save



3. Click the pencil to edit Log Conversations, check the box and click Save. Now Einstein Bots will log chat conversations and let you run reports on them!

Einstein Bot Builder Bert : ver. 1 Back Help

Overview Activate

Bot Information Edit

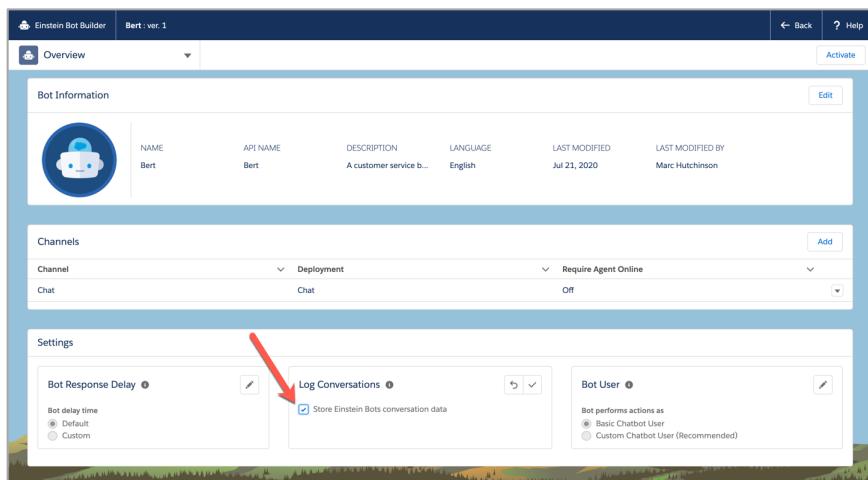
NAME	Bert	API NAME	Bert	DESCRIPTION	A customer service b...	LANGUAGE	English	LAST MODIFIED	Jul 21, 2020	LAST MODIFIED BY	Marc Hutchinson
------	------	----------	------	-------------	-------------------------	----------	---------	---------------	--------------	------------------	-----------------

Channels Add

Channel	Deployment	Require Agent Online
Chat	Chat	Off

Settings

Bot Response Delay	<input type="checkbox"/>
Bot delay time	<input checked="" type="radio"/> Default
	<input type="radio"/> Custom
Log Conversations	<input checked="" type="checkbox"/> Store Einstein Bots conversation data
Bot User	<input type="checkbox"/>
	Bot performs actions as
	<input checked="" type="radio"/> Basic Chatbot User
	<input type="radio"/> Custom Chatbot User (Recommended)



4. That was easy! Ready to take your bot for a test drive? Let's do it!

TEST YOUR BOT

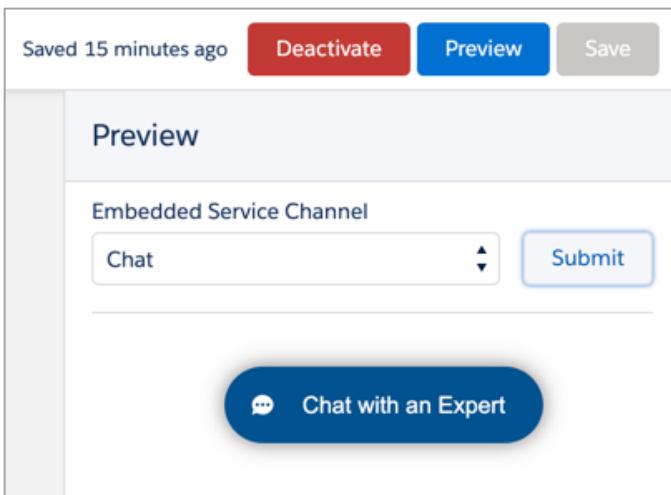
Now let's just make sure your bot is working properly and try some of the features we've enabled so far. Testing your bot is easy! You don't even need to use a website to get started, since the Einstein Bot Builder includes an awesome Preview tool to chat with your bot whenever you want to. Here's how to find it and a quick intro to Einstein Bot Builder to get you started.

1. Use the down arrow next to Overview and click the **Dialogs** to get back to your bot's dialog tab.

2. The Dialogs tab gives you access to all of the things your bot knows how to do and say. During a conversation with a customer, your bot moves between several different dialogs. Each dialog handles a portion of the conversation. The wizard already created some dialogs to get your bot started. For example, your bot already knows how to offer a Welcome message, display a Main Menu and Transfer to Agent if it gets confused. Take a moment to explore what we have to start with and consider which Dialogs you may want to add.

The screenshot shows the Einstein Bot Builder interface. At the top, there's a header with the title 'Einstein Bot Builder' and a sub-header 'Bert : ver. 1'. Below the header is a navigation bar with tabs like 'Dialogs', 'Intents', 'Flows', and 'Metrics'. The 'Dialogs' tab is active. On the left, there's a sidebar titled 'Dialogs' with a search bar and a list of 9 items: 'Welcome', 'Main Menu', 'Check the Status of a Case', 'Update my Contact Info', 'Schedule an Appointment', 'Transfer To Agent', 'End Chat', 'Confused', and 'No Agent'. The 'Welcome' item is currently selected and expanded, showing its details. The main panel has a title 'Detail' and a status bar indicating 'Saved 12 minutes ago' with buttons for 'Activate', 'Preview', and 'Save'. The 'Dialog Name' is 'Welcome' and the 'Dialog Description' is 'Dialog Details'. Under the 'Message' section, there's a message card with the text 'Hi I'm Bert, your friendly customer service chat bot.' and a small icon. Below that is a 'Next Step' section with a radio button labeled 'Select Next Step' and three options: 'Wait for customer input' (unchecked), 'Show a menu' (unchecked), 'Start another dialog' (checked), and 'Transfer to an agent' (unchecked). A dropdown menu is open, showing 'Main Menu' as the selected option.

- To test the things we've added to the bot so far, look in the upper right corner of the screen. Click **Activate** and then click **Preview**. The Preview tool is the easiest way to chat with your bot and test changes that you make along the way. Click **Submit**, then **Chat with an Expert** to test your bot.



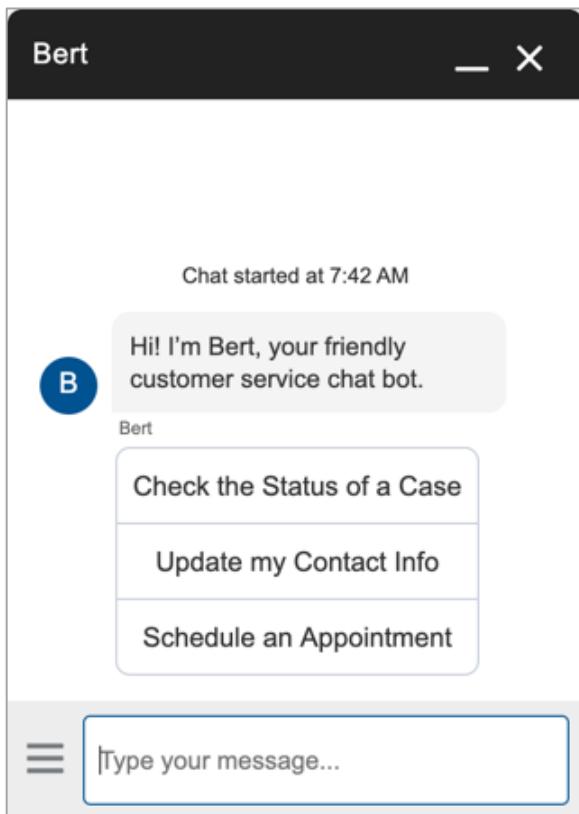
4. Fill out the pre-chat form as shown below. Your bot needs these details to get started, but you can always remove them or add new fields to the pre-chat form later if you like.

The form consists of several input fields:

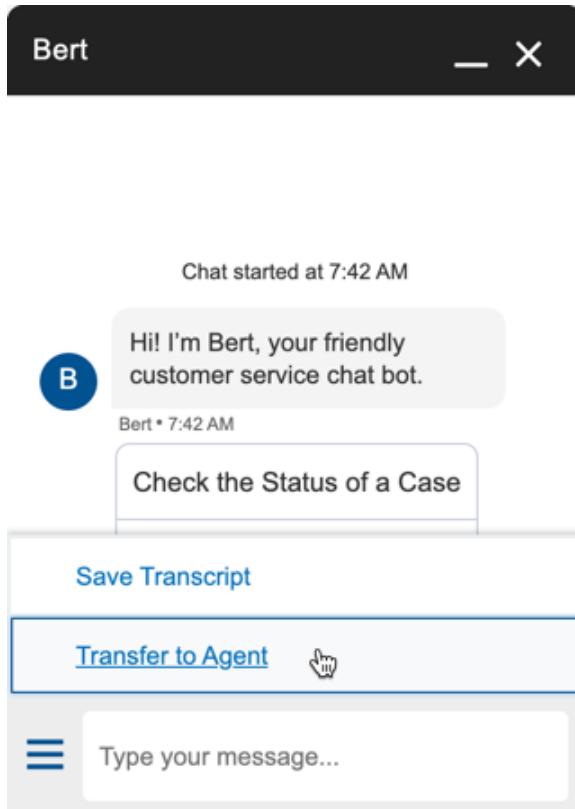
- First Name: Lauren
- Last Name: Bailey
- Email: lbailey@gmail.com
- Subject: I need help
- Web Email: (empty)

A large blue button at the bottom right of the form area is labeled "Start Chatting".

5. Click the **Start Chatting** button. You should now see your bot display your welcome message and your clickable/tappable navigation menu:



6. Check out the Bot Options Menu  in the lower left corner of the chat. It's a great place to display quick, convenient links for your customers.

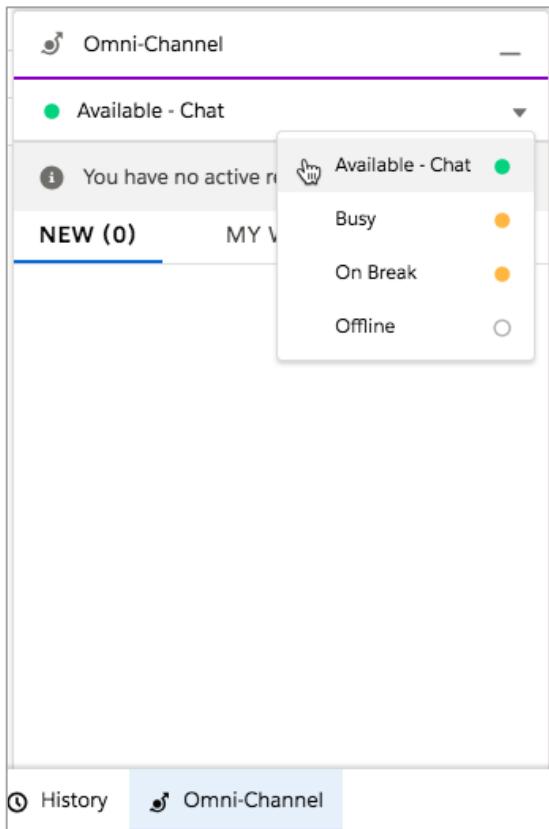


The screenshot shows a chat interface with a dark header bar. On the left is a blue circular profile picture with a white letter 'B'. To its right is the name 'Bert' in white. To the right of the name are two icons: a white minus sign and a white 'X'.

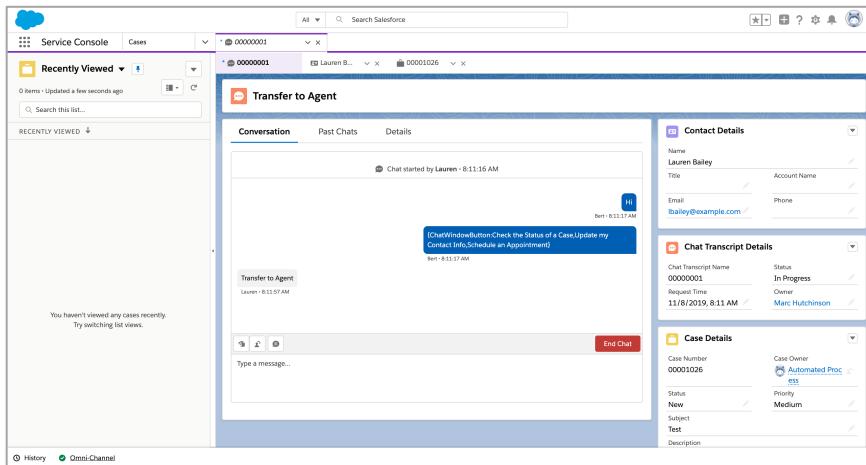
Below the header, the text 'Chat started at 7:42 AM' is displayed. A message from 'Bert' at 7:42 AM says, 'Hi! I'm Bert, your friendly customer service chat bot.' Below this message is a button labeled 'Check the Status of a Case'.

A 'Save Transcript' link is visible above a 'Transfer to Agent' button, which has a hand cursor icon over it. At the bottom, there is a text input field with a blue three-line icon and the placeholder text 'Type your message...'. The entire interface is set against a light gray background.

7. In another browser tab, use the waffle icon  to open the **Service Console** and set your Omni-Channel utility to **Available – Chat**.



8. Switch back to your other browser tab to click  and then click **Transfer to Agent**. Use the Omni-Channel utility to accept the chat and witness the glory of the automatic screen pop with 360-degree view of the customer and an automatically created Case!



CONGRATULATIONS

You've just set up the basics of Einstein Bots to give your customers all of the answers they need, quickly and easily. Your customer satisfaction ratings are already on the upswing, as your customers will very soon have access to answers for their burning questions right at their fingertips.

Continue your learning with more trails for Service Cloud in Trailhead:



- **Artificial Intelligence for Customer Service**
<https://sfdc.co/AI4CS>
- **Einstein Bot Basics**
<https://sfdc.co/BotBasics>
- **Service Console Customization**
<https://sfdc.co/ConsoleCustomization>

Trail 3:

Bot Building Blocks

Dialog Elements are the essential building blocks of your bot. They enable your bot to interact with customers, automate business processes and expose services from the Salesforce Platform. In this module, you will use Dialog Elements to:

- Engage in conversations with customers
- Tap into CRM data to help your bot answer questions
- Use rules to control how your bot handles customer requests
- Access Salesforce Platform services and expose them to customers

In the following section, we will walk through how you can set up a bot to expose more wonderful Salesforce goodness and begin to add convenience and speed that will bring customers back again and again.



Why is this important?

- Increase Case Deflection
- Increase Customer Satisfaction
- Allow Customer to Self-Serve
- Solve Customer Issues Faster
- Convenience and Speed for Customers
- Context and Triage for Agents

Housekeeping Check: Before we move forward, please close any extra console or browser tabs that opened during the previous module.

WHAT WE'LL BE WORKING ON

- A Little Bit of Prep
- Permission Your Bot
- Register with the Einstein Platform
- Check Case Status
- Update Contact Info

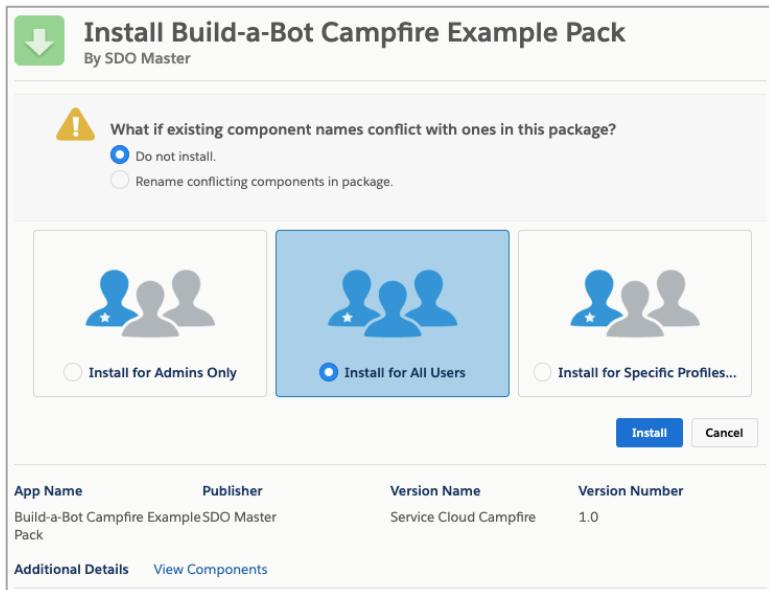
A LITTLE BIT OF PREP

Before we get started and to help speed things up, we have gone ahead and created some sample bot assets that you can use for this module.

1. Type this link in your browser to install the package:

<https://sfdc.co/build-a-bot>

2. Select the **Install for All Users** option. Click **Install**.



3. Give it a minute to finish installing and then click **Done!**

PERMISSION YOUR BOT

Our next step is to give our bot a little more freedom to explore your customer data so that it can personalize the conversation and expose some useful platform Actions to your customers.

1. Navigate to Lightning Setup and use the Quick Find box in the upper left corner of the screen to search for **Permission Sets**.

Click on the Permission Set named

sfdc.chatbot.service.permset

The screenshot shows the 'Permission Sets' page in Salesforce. At the top, there's a header with a user icon, 'SETUP', and 'Permission Sets'. Below the header, the page title is 'Permission Sets' with a subtitle 'On this page you can create, view, and manage permission sets.' A note below says 'In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android'.

Below the title, there are buttons for 'New', 'Edit', 'Delete', and 'Create New View'. A navigation bar with letters A through Z and 'Other' is at the top right. The main area is a table with columns: 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists various permission sets like 'CRM User', 'Einstein Analytics Platform Admin', etc. The row for 'sfdc.chatbot.service.permset' is circled in red.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Einstein Analytics Platform Admin	Create and customize Einstein Analytics apps, dashboards, data...	Analytics Platform
<input type="checkbox"/>	Einstein Analytics Platform User	View Einstein Analytics apps and dashboards.	Analytics Platform
<input type="checkbox"/>	Live Agent Setup Flow		
<input type="checkbox"/>	Sales Analytics Admin	Create and customize Sales Analytics apps and data flows.	Sales Analytics Apps
<input type="checkbox"/>	Sales Analytics User	View Sales Analytics apps.	Sales Analytics Apps
<input type="checkbox"/>	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/>	Service Analytics Admin	Create and customize Service Analytics apps and data flows.	Service Analytics Apps
<input type="checkbox"/>	Service Analytics User	View Service Analytics apps.	Service Analytics Apps
<input type="checkbox"/>	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/>	Survey Creator	Lets a user create, edit, and delete Surveys.	Survey Creator User - 1 Seats
<input type="checkbox"/>	sfdc.chatbot.service.permset		

At the bottom, there are pagination controls '1-12 of 12' and '0 Selected', and a 'Page' button with '1 of 1'.

2. Let's drill into the Object Settings link and give your bot access to some data.

The screenshot shows the 'Apps' page in Salesforce. At the top, there's a header with a user icon, 'SETUP', and 'Apps'. Below the header, the page title is 'Apps' with a subtitle 'Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform' and a 'Learn More' link.

Below the title, there are sections: 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings' (which is circled in red), 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', 'External Data Source Access', and 'Named Credential Access'.

3. Your bot will need access to the following Objects and Fields:

a. **Chat Transcripts**

- i. Object Permissions – Read, View All
- ii. Field Permissions – **Contact Name** (Read)

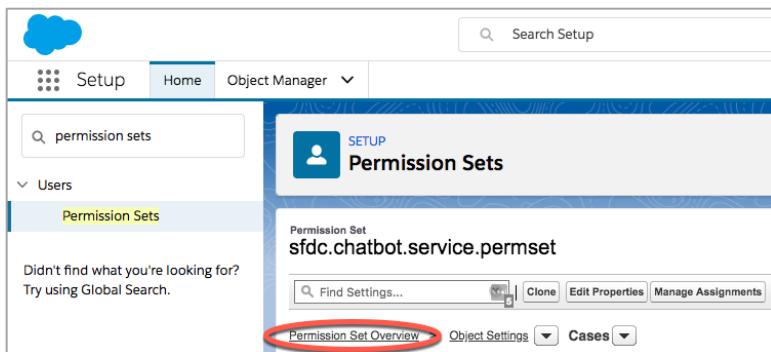
b. **Contacts**

- i. Object Permissions – Read, View All
- ii. Field Permissions – **Phone** (Read + Edit)

c. **Cases**

- i. Object Permissions – Read, View All
- ii. Field Permissions – **Subject** (Read)

4. Click on the Permission Set Overview link to go back to the main screen.



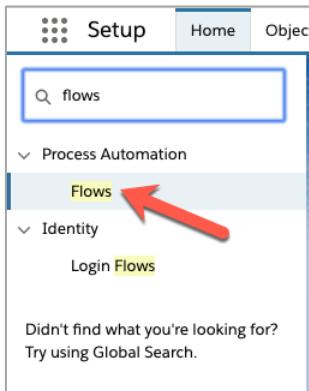
5. Click on the Apex Class Access link

The screenshot shows the 'Apps' settings page. At the top, there's a section titled 'Assigned Apps' with a sub-section 'Assigned Connected Apps'. Below that is 'Object Settings', then 'App Permissions' which includes a link to 'Apex Class Access' (this link is highlighted with a red oval). Other sections include 'Visualforce Page Access', 'External Data Source Access', 'Named Credential Access', 'Service Presence Statuses Access', and 'Custom Permissions'. There's also a 'Learn More' link under the first section.

6. Let's give your bot permission to run some Apex Actions to help it offer some great services your customers will love. Add the two Apex Classes whose names begin with **Campfire** and click **Save**.

The screenshot shows the 'Enabled Apex Classes' screen. At the top, there are 'Save' and 'Cancel' buttons. Below them is a section titled 'Enabled Apex Classes' containing a list of two classes: 'CampfireFindCases' and 'CampfireUpdatePhone'.

7. Look for the Quick Find box in the upper left corner of your screen and search for the word **flows**. Click on **Flows** setup node.



8. Click on the Flow Label **Campfire – Find Contact**.

Flow Label	Process Type	Active	Package State	Last Modified By	Last Modified Date
Campfire – Find Contact	Autolaunched Flow	✓	Unmanaged	Marc Hutchinson	7/22/2020, 3:55 PM

A red arrow points to the 'View Details and Versions' button in the top right corner of the table row.

9. Click **Activate**.

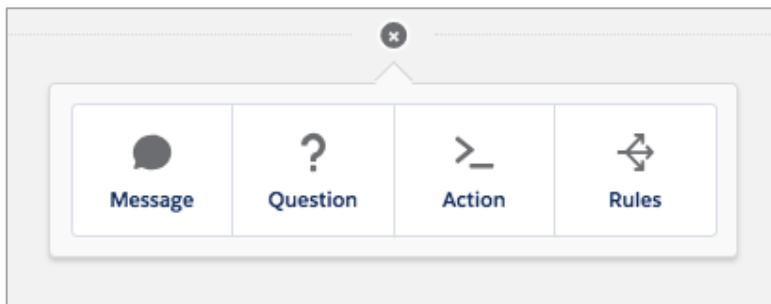
Flow Versions								
Action	Flow Label	Version	Description	Built with	Created Date	Run Restrictions	Type	Status
Open Run	Activate	Campfire – Find Contact	1	Returns a Contact record for the specified Contact Id	Flow Builder 6/30/2019 8:55 AM	None	Autolaunched Flow	Inactive

All set! Your bot can now access a little bit of customer data and some example actions!

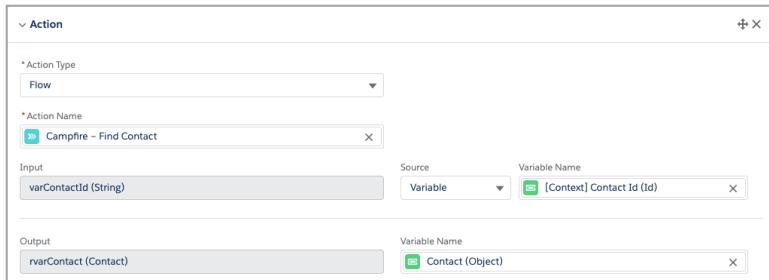
CHECK CASE STATUS

Okay, let's get going! Time to help your bot dip into your CRM data and use it in conversations. We'll use Cases to start and let our customers ask the bot to check the status. For this exercise to work, we will need to locate our customers in the CRM database in order to check their Case status.

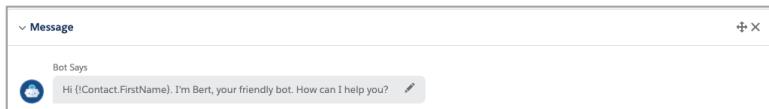
1. In the Quickfind box, type **bots**, and select the **Einstein Bots** setup node.
2. Click the down arrow at the right of your bot and select Edit.
3. Click the red Deactivate button – because we can't edit an active bot!
4. Select the **Welcome** Dialog and click the (+) See those tiles for Message, Question, Action and Rules? Those are the bot building blocks we mentioned earlier. Just as in your DNA, four little building blocks can do a lot!



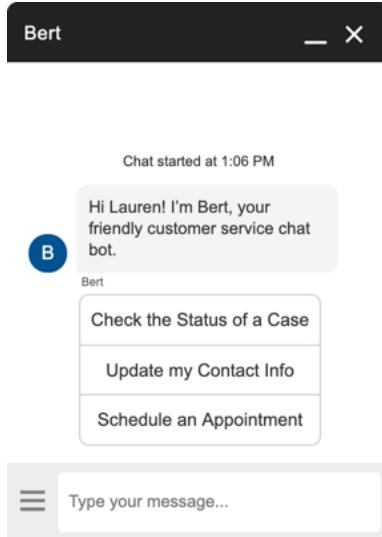
5. Let's use an **Action** block to retrieve a Contact record. Let's Create an Action of type **Flow**. Be sure to insert it above the existing Message block. In Action Name select **Campfire – Find Contact**. For your Input Variable varContactId, select **[Context] Contact Id (Id)**. For your Output Variable rvarContact, create a new Object variable called **Contact**.



6. Now let's update our greeting message below the Flow action, and greet our customer by name. Change your bot's greeting to: **Hi {!Contact.FirstName}. I'm Bert, your friendly bot! How can I help?**



7. Now we can Save, Activate and Preview our new Greeting.



CHECK CASE STATUS

Ok, now our bot knows how to find our Contact records. Let's teach it to look up all of the Cases for a Contact.

1. Click on the Dialog named **Check the status of a Case** and add a new **Question** block to let our customers select their Cases from a list so the bot can tell them the status.

Bot Asks: **Which case would you like to check?**

We'll need to create an **Object Variable** to remember which **Case** the customer is interested in. We'll let customers select the Case they want by **{!Subject}**.

HANDS-ON WITH EINSTEIN BOT BUILDER

Question

* Bot Asks
Which case would you like to check?

* Entity Name [System] Object (Object) * Save Answer to Variable Case (Object)

> Conversation Repair

Choice Type - Dynamic/List Variable

Choice Type Display Options As

The output from the action is displayed to your customer as choices.

{!Subject}

* Action Type Apex

* Action Name Campfire - Find Cases For Contact

Input contacts (Contact) Source Variable Variable Name Contact (Object)

Output output (List<Case>) The output from the action is displayed to your customer as choices.

Error Rule
If the action doesn't result in any choices to display to your customer, tell the bot what to do.

* Rule Action Redirect to Dialog * Dialog Name Confused

2. Now we can simply display the **Status** field in a **Message Block** based on the Case your customers select.

Enter: **Your Case Status is: {!Case.Status}.**

The screenshot shows a 'Message' block configuration. Under 'Bot Says', there is a text input field containing 'Your Case Status is: {!Case.Status}' with a small edit icon next to it. A blue bot icon is positioned to the left of the text input.

3. Add a rule to clear the Variable for the **Case (Object)** to allow checking the status of another case. Do not clear any of the other Variables. These do not change throughout the session and will be used in other Dialogs later.

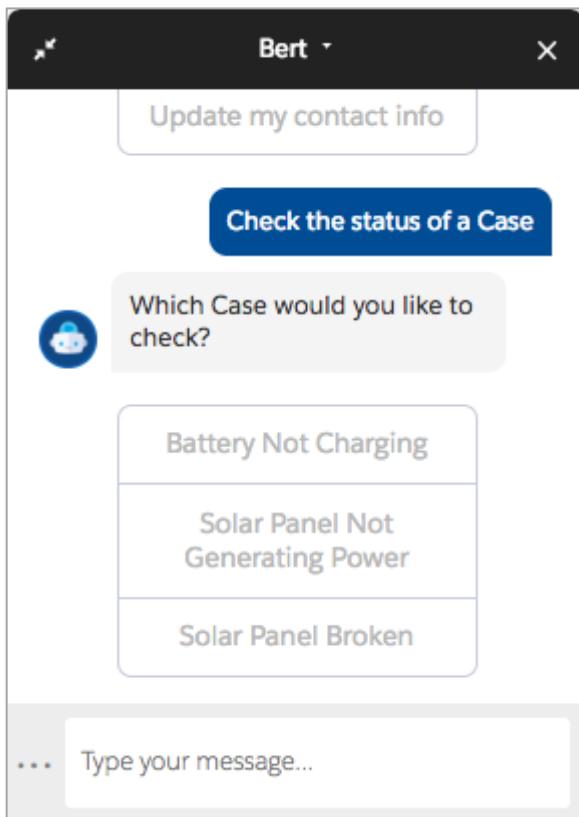
The screenshot shows a 'Rules' configuration screen. Under 'CONDITIONS', it says 'You haven't created any rule conditions yet'. Under 'RULE ACTIONS', there is a dropdown menu set to 'Clear Variable Value' and a variable name input field set to 'Case (Object)'.

4. Don't forget to send the customer back to the Main Menu so they know what to do next.

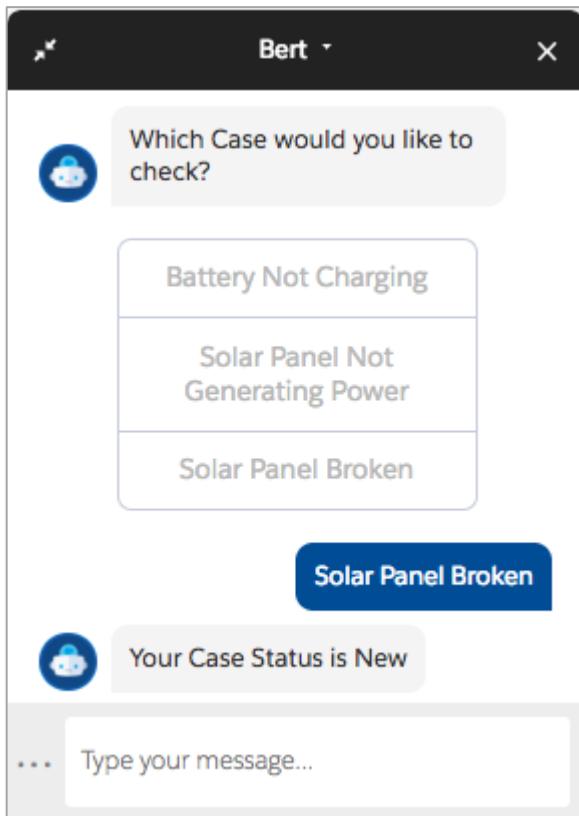
The screenshot shows a 'Next Step' configuration screen. It includes radio button options: 'Wait for customer input', 'Show a menu', 'Start another dialog' (which is selected), and 'Transfer to an agent'. Below this, it says 'Select a dialog that the bot shows your customer.' and shows a dropdown menu set to 'Main Menu'.

5. Click **Save** and **Activate** your bot so that we can test this.

6. Use the Preview tool to chat with the bot and check out your Cases:



7. When you select one of the Cases, the bot will tell you what the **Status** is.



UPDATE CONTACT INFO

Salesforce makes it easy to enable your bot to update CRM information based on customer conversations. Let's spend a few minutes learning more with a simple bot Dialog designed to help the customer update their phone number.

1. Click on the Dialog named **Update my contact info** and add a new **Question** block to let your customers enter their new phone numbers.

Bot Asks: **What would you like to change your phone number to?**

You'll also need to create a new Variable called **Phone (Text)**.

The screenshot shows the configuration of a 'Question' block in the Einstein Bot Builder. The 'Bot Asks' field contains the text 'What would you like to change your phone number to?'. The 'Entity Name' dropdown is set to '[System] Text (Text)' and the 'Save Answer to Variable' dropdown is set to 'Phone (Text)'. Under 'Choices (Optional)', the 'Static' radio button is selected. There is a 'Add Choice' button available. Below the question, there is a note: 'Give your customers a quick and easy way to reply to this question.' followed by a 'Display Options As' dropdown set to 'Buttons'. At the bottom, there is a checkbox for 'Recognize and save the answer from customer input'.

2. Next, we'll use the **Update Phone** Apex Action to update the Phone field in the CRM database.

The screenshot shows the configuration for an Apex Action named "Campfire - Update Phone". The action type is set to "Apex". The input object is "objContact (Contact)" and the input value is "value (string)". There are two variable assignments: one for "Contact (Object)" from "Variable" and another for "Phone (Text)" from "Variable". The output object is "output (Contact)" and its variable name is "Contact (Object)".

3. And finally, we will display the new phone number we've captured from them after writing it to the CRM database. Add a new **Message** block and enter:

Bot Asks: OK, you're all set. We've updated your phone number to {!Contact.Phone}.

The screenshot shows a message block with the title "Message". Under "Bot Says", there is a message bubble containing the text "Ok, you're all set. We've updated your phone number to {!Contact.Phone}" followed by a pencil icon for editing.

4. By now you know why it makes sense to clear our Variable when we're done using them, so go ahead and add a rule to clear the **Phone (Text)** Variable.

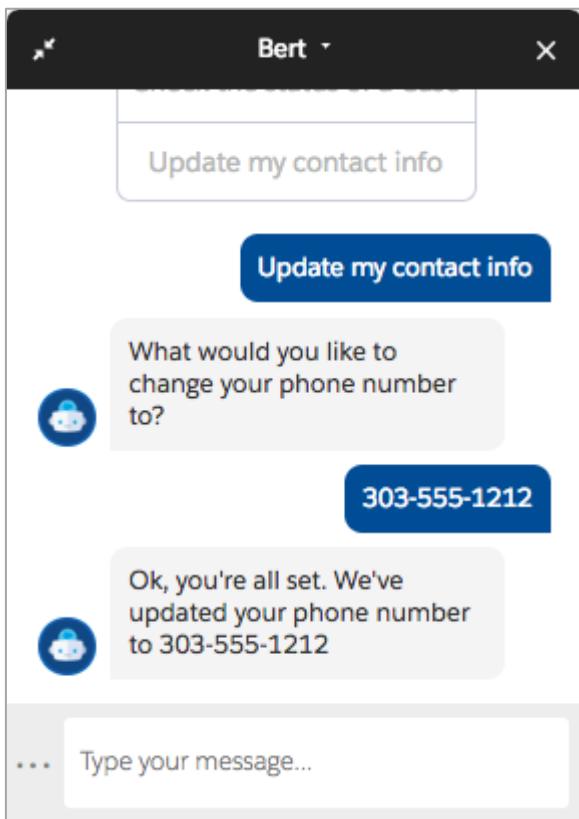
The screenshot shows the 'Rules' configuration screen. It has sections for 'CONDITIONS' and 'RULE ACTIONS'. Under 'CONDITIONS', there is a note: 'You haven't created any rule conditions yet' with a '+Add Condition' button. Under 'RULE ACTIONS', there is a 'Rule Action' dropdown set to 'Clear Variable Value' and a 'Variable Name' dropdown set to 'Phone (Text)' with an 'X' button to remove it.

5. Don't forget to redirect the customer back to the Main Menu so they know what to do next.

The screenshot shows the 'Next Step' configuration screen. It has options for 'Wait for customer input', 'Show a menu', 'Start another dialog' (which is selected), and 'Transfer to an agent'. Below these options is a note: 'Select a dialog that the bot shows your customer.' A dropdown menu is open, showing 'Main Menu' with an 'X' button to remove it.

6. Click **Save** and **Activate** your bot so that we can test this out.

7. Use the Preview tool to chat with the bot and update your phone number:



CONGRATULATIONS!

You've done it! You added valuable skills to your bot that your customers will love. Keep going! There is so much more your bot can do with a little bit of creativity and a quick read of the documentation in the Trailblazer Community.

Find detailed documentation and connect with like-minded bot builders in the Salesforce Trailblazer Community:



- **Einstein Bots for Service Cloud**
<https://sfdc.co/Bots4Service>
- **Einstein Bots Developer Cookbook -**
<https://sfdc.co/BotsGuide>

Trail 4: Natural Language Training

OVERVIEW

In this module, you'll see how to train your bot to understand natural language, in this case using the English language. Intents are the customer's reasons for interacting with your bot. For example, scheduling an appointment, changing a flight or getting store hours.

You will associate intents with your dialogs and then train the bot to create a learning model that it can use to understand intents. If your customers interact with your bot by typing a message in the chat window, use intents to help your bot understand what they want.

Why is this important?



- Tailor Service Cloud to your Business and Customers
- Put common bot skills a quick message away
- Faster than navigating bot menu trees
- Collect details from customer throughout conversations
- Make bots more convenient than any other channel

Housekeeping Check: Before we move forward please close any extra browser tabs that opened during the previous module.

WHAT WE'LL BE WORKING ON

- Add Intents to Your Dialogs
- Test Your Bot
- Appointment Scheduling Example

ADD INTENTS TO YOUR DIALOGS

We'll begin this exercise in the **Einstein Bot Builder** where we can teach our bots to understand customers who want to schedule an appointment, update their contact info or transfer to an agent.

1. Navigate to the **Dialogs** tab and select the Dialog named **Schedule an Appointment**.
2. Click the **Enable Dialog Intent** button in the upper right corner of the screen.
3. A new tab will appear in the Dialog header called From this tab you can reuse collections of customer utterances called **Dialog Intent** where you can add Intent Extensions or enter individual utterances in the Utterances panel. We will try both.



4. Let's start by clicking the **Add Intent** button to add a collection of customer utterances that we loaded at the beginning of Trail 3.

5. A modal appears where we can select one of the Intent sets we loaded earlier.

Choose the one called **Appointments** and click **Save**.

The screenshot shows a modal window titled "Select an Intent". It contains a table with three columns: NAME, DESCRIPTION, and DOMAIN NAME. There are four rows:

NAME	DESCRIPTION	DOMAIN NAME
Appointments	Schedule an on-site appointment with a field service...	Build-a-Bot Campfire
Contact Info	Phone number has changed and needs to be updated.	Build-a-Bot Campfire
Transfer to Agent	User wants to talk with a live agent instead of a chat...	Build-a-Bot Campfire

At the bottom right of the modal are two buttons: "Cancel" and "Save". The "Appointments" row has a checked checkbox in the first column.

6. Next, click on the Utterances panel to add our own utterances. Type in 4-5 examples of the types of things your customers might say to the bot when they want to schedule a new appointment. **Make sure you hit the return key to add your text to the list before clicking Save!**

The screenshot shows the "Utterances (3)" section of the Einstein Bot Builder. It includes a note: "Train the bot to know when to start this dialog. Enter all the ways your customers ask for help related to this dialog. The Intent model requires a minimum of 20 utterances but 150 or more is ideal. The more variations you provide, the better your bot understands your customers." Below this is a list of three utterances:

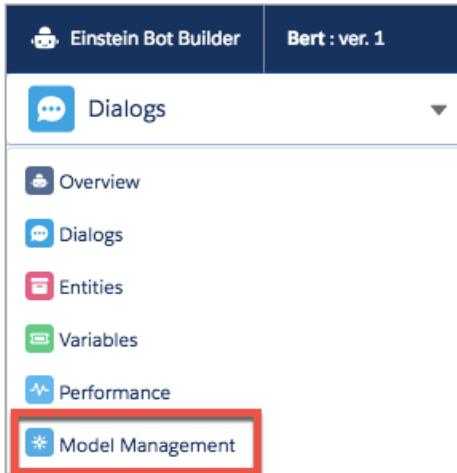
- 1 I want to schedule an appointment
- 2 Appointment needed
- 3 Schedule appointment

At the top right of the list is an "Add" button.

7. Be sure to flip the Einstein switch in the upper right corner of your screen to the **On** position. This will tell our bot to use AI to determine customer intent rather than an exact match of the utterances we've added.

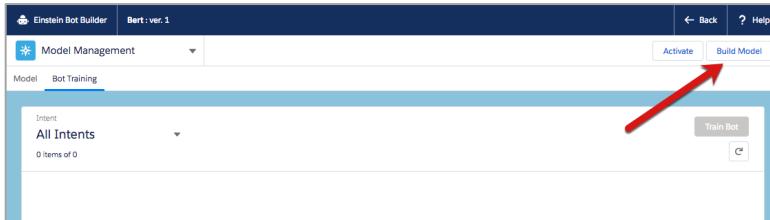
The screenshot shows the "Schedule an Appointment" dialog details page. It has sections for "Dialog Name", "Intent Name", "Dialog Description", and "Einstein". The "Einstein" section includes a switch labeled "On" which is turned on, indicated by a red arrow pointing to it. Below the switch is the text "28 Utterances".

8. Repeat the previous steps for the **Transfer To Agent** and **Update my Contact Info** Dialogs so that your bot can learn those ones too.
9. Select **Model Management** from the drop-down menu.



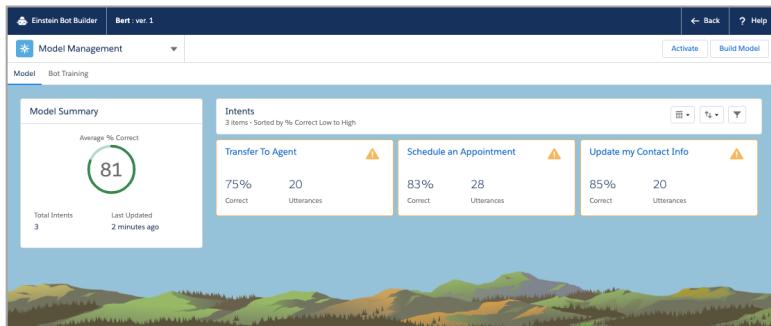
Train the bot by clicking **Build Model** in the upper right corner of the **Model Management** section.

Note: The training process takes several minutes to complete.



HANDS-ON WITH EINSTEIN BOT BUILDER

- Once training has completed, you will see a helpful dashboard appear with training tips on how to make your bot more accurate.



CHECK THIS OUT TOMORROW

- After your bot has been chatting with users for 24 hours,** your bot will collect new utterances that it hasn't seen before. Click the **Bot Training** tab to see a list.

CUSTOMER INPUT	SUGGESTION	OCCURRENCES	FIRST SEEN
replace	Appointments	1	Jun 27, 2019
glass	Orders	1	Jun 27, 2019
What is the status of my order	Orders	1	Jun 27, 2019
nope	Appointments	1	Jun 27, 2019
case update	Update Address	1	Jun 27, 2019
update a case	Update Address	1	Jun 27, 2019
I need an aptt	Appointments	1	Jun 27, 2019
change my phone number	Update Phone	1	Jun 28, 2019
I want to speak to an agent	Transfer To Agent	1	Jun 28, 2019
email address	Update Email	1	Jun 28, 2019

- Click the **Train Bot** button to walk your bot through the training wizard and help make it even smarter!

Training: All Intents

Progress: 2/14

Customer Says: What is the status of my order

Classified As: Orders

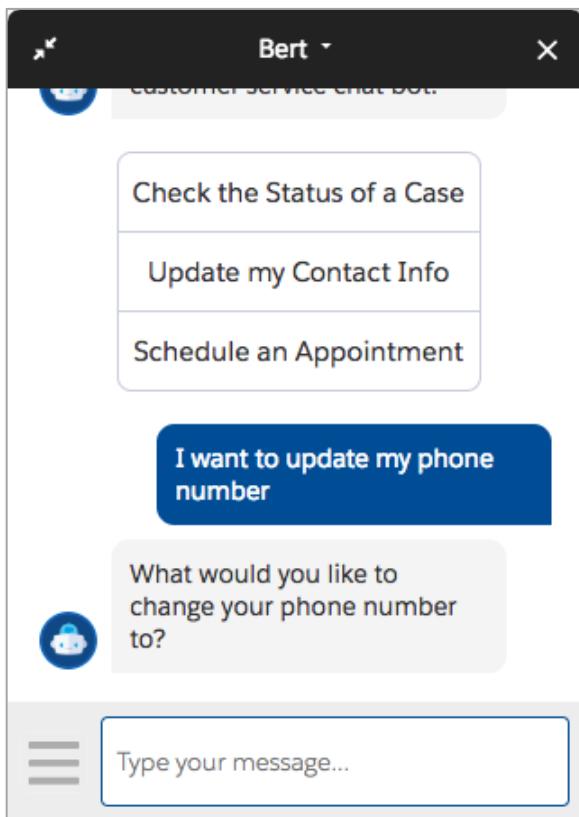
Click (or press the indicated key) to classify the customer input to an intent:

Classify (a) **Ignore (i)** **Reclassify (r)**

TEST YOUR BOT

Now let's try chatting with our bot using plain English, rather than clicking menus and buttons. From the **Dialogs tab** in Einstein Bot, make sure your bot is **Active** and click on the **Preview** button to chat with your bot. Enter the Contact details you've been using and click **Chat with an Expert**.

1. Now try asking your bot something like "**I want to schedule an appointment**" or "**I want to talk to an agent**". Your bot understand what you want and jumps straight to the correct Dialog!



SCHEDULING APPOINTMENTS

You're on your way to making self-service simple and easy for your customers. Let's make your Bot smarter by teaching it to pick up on important details during conversations.

If you aren't already there, navigate to the **Dialogs** tab and select the Dialog named **Schedule an Appointment**.

1. Let's ask a question about the type of appointment. Click the plus sign and add a Question Block.

Bot Asks: **What type of appointment would you like to make?**

2. We'll need to create a Variable to save the answer our customer gives us. Select the **[Build_a_Bot_Campfire] Appointment Type (Text)** Entity and click **New Variable** and add new one named **Appointment Type** to capture the response we get from the customer.

*Note that **[Build_a_Bot_Campfire] Appointment Type (Text)** is a custom Entity Type that we installed with the package at the beginning of Trail 3. Basically, it is a collection of synonyms for things people say for Repair, Maintenance and Installation appointments. You can explore it by navigating to the Einstein Intent Sets node in Lightning Setup.*

3. Provide some pre-defined appointment types for your customer to click on so they don't have to type too much. Add three static values: **Repair**, **Maintenance**, **Installation**.

4. Be sure to check the box for Recognize and save the answer from customer input ⓘ so that your bot knows to look for the Appointment Type in other utterances from users. If your bot already got the answer from the customer, it will skip the question when this box is checked!

Your Question Block should now look like this:

The screenshot shows the configuration of a 'Question' block in the Einstein Bot Builder. The block is titled 'Question' and has the following settings:

- Bot Asks:** A message bubble icon followed by the text "What type of appointment would you like to make?".
- Entity Name:** [Build_a_Bot_Campfire] Appointment Type
- Save Answer to Variable:** Appointment Type (Text)
- Checkboxes:** Recognize and save the answer from customer input ⓘ
- Conversation Repair:** Indicated by a right-pointing arrow icon.
- Choice Type - Static:** Indicated by a downward arrow icon.
- Choice Type Buttons:** Static (selected) and Dynamic.
- Display Options As:** Buttons (selected) and Menu.
- Choices:** Repair, Maintenance, Installation, Add Choice.

5. Let's add another question to ask what type of work the customer want us to perform when we get there.

Bot Asks: What type of work would you like us to perform when we arrive?

6. Select the **[System] Text (Text)** Entity and click **New Variable** and add new one. Create a new Variable called **Work Type (Text)**. We won't provide any predefined Choices so that our customer can type anything they want in their response.

Your Question Block should now look like this:

The screenshot shows the configuration of a 'Question' block in the Einstein Bot Builder. The block is titled 'Bot Asks' and contains the utterance 'What type of work would you like us to perform when we arrive?'. Below the utterance, there are two input fields: 'Entity Name' set to '[System] Text (Text)' and 'Save Answer to Variable' set to 'Work Type (Text)'. Under 'Choices (Optional)', the 'Static' radio button is selected. There is a 'Add Choice' button and a note to 'Give your customers a quick and easy way to reply to this question.' To the right, 'Display Options As' is set to 'Buttons'. At the bottom, there is a checked checkbox for 'Recognize and save the answer from customer input'.

7. For our last question, let's find out when our customer wants us to visit them.

Bot Asks: **When would you like us to arrive?**

8. Select the **[System] DateTime (DateTime)** Entity Name and create a new Variable called **Appointment Time (DateTime)** to help our bot remember the preferred date and time.
9. Let's check the **Recognize and save the answer from customer input** box again so that your bot knows to look for the Appointment Time in other utterances from users.

Note that Einstein Bots are already trained to recognize a wide variety of Date and Time forms so that you don't have to train for it yourself!

Your Question Block should now look like this:

The screenshot shows the configuration for a 'Question' block. It includes a 'Bot Asks' section with the text 'When would you like us to arrive?'. Under 'Entity Name', '[System] DateTime (DateTime)' is selected. Under 'Save Answer to Variable', 'Appointment Time (DateTime)' is selected. A checked checkbox says 'Recognize and save the answer from customer input'. Below the main configuration are two collapsed sections: 'Conversation Repair' and 'Choice Type - Static'.

10. Now let's summarize the appointment details for our customer in our final Message Block. You can use merge curly brackets to read back the customer entries like this:

Enter: **Got it. Your appointment details are as follows:**

Appointment Type: {!Appointment_Type}

Work Type: {!Work_Type}

Appointment Time: {!Appointment_Time}

The screenshot shows the configuration for a 'Message' block. It includes a 'Bot Says' section with the text 'Got it. Your appointment details are as follows:' followed by three merge curly bracketed lines: 'Appointment Type: {!Appointment_Type}', 'Work Type: {!Work_Type}', and 'Appointment Time: {!Appointment_Time}'. To the left of the message area is a blue circular icon with a white robot head.

11. Because Variables keep their values throughout the whole bot session, we need to clear some Variable values and allow your customer to book more than one appointment.

Add a **Rule for each of the three Variables** used in this dialog (**Appointment Type, Work Type, Appointment Time**) that clears their values.

The screenshot shows the 'Rules' section of the Einstein Bot Builder. It has two main sections: 'CONDITIONS' and 'RULE ACTIONS'. Under 'CONDITIONS', there is a message: 'You haven't created any rule conditions yet' and a '+Add Condition' button. Under 'RULE ACTIONS', there are three entries, each consisting of a 'Rule Action' dropdown set to 'Clear Variable Value' and a 'Variable Name' dropdown:

- Variable Name: Appointment Type (Text)
- Variable Name: Work Type (Text)
- Variable Name: Appointment Time (DateTime)

12. The last thing we need to do is decide what should happen at the end of this dialog. Let's send the customer back to the **Main Menu** just in case they want to do something else:

The screenshot shows the 'Next Step' section of the Einstein Bot Builder. It has a list of options:

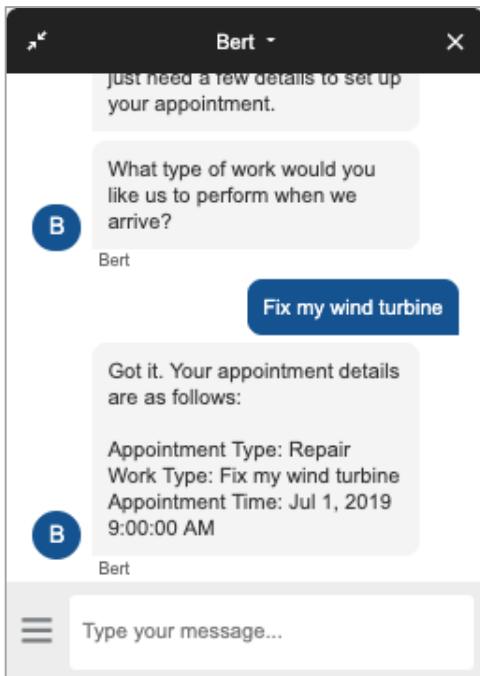
- Wait for customer input
- Show a menu
- Start another dialog
- Transfer to an agent

Below this, there is a note: 'Select a dialog that the bot shows your customer.' and a dropdown menu containing 'Main Menu'.

13. Click **Save** and **Activate** your bot so that we can test this.
14. Use the **Preview** tool to chat with the bot and try out your shiny new appointment scheduler!

Try something like: **I want to schedule a repair appointment for Monday morning at 9.**

15. Your bot will only ask for the Work Type and skip the other two questions since it was able to find answers for them in your first utterance. After you reply to your bot's question, you should see a summary of your appointment details like this:



16. Look how smart your bot is getting. They grow up so fast!

CONGRATULATIONS!

Whoa. You just trained your bot to understand natural language using Einstein AI! You must be some kind of a genius! Don't stop now. We are only getting started exploring all of the amazing things you can do with Einstein Bots!

Let's continue learning together in the Salesforce Trailblazer Community:



- **Build-a-Bot Campfire Community Group -**
<https://sfdc.co/BotCampGroup>
- **Einstein Bots Community Group -**
<https://sfdc.co/BotGroup>

Keep Exploring

Learning is what we do every day, it's how we grow and how we innovate! Salesforce is making it easy for you to learn! Gone are the days of boring manuals and documentation. We're making learning fun with **Trailhead**!

Now you can brush up on your skills or learn new ones using an amazing interactive platform that rewards you for being awesome. You get a shiny Salesforce Org with lots of bells and whistles and even some mini-projects to really get some hands-on experience.

LEARN MORE WITH TRAILHEAD

1. From Service Setup Home, locate the **Recommended Setup** items list on the right side.

Click **View All** on the right, click Resources and select **Service Cloud Basics**.

Setup

Search

 **Salesforce Admin Training** 
Register for trainings to hone your Salesforce skills.

 **See System Status** 
Get real-time information on Salesforce performance and security.

 **Service Cloud Basics** 
See how Service Cloud can help you keep your customers happy.

 **View Release Notes** 
Learn all about the current Salesforce release.

 **Voice Support Setup**
Connect your phone to Service Cloud.

2. A new browser tab will open with the Service Cloud for Lightning Experience Basics module presented. Click **Login** to get started.

Note: Login using your own personal Salesforce credentials, not the trial org credentials we've been using today during the Campfire. If you don't have any, then sign up directly with your email address.

Module

Service Cloud for Lightning Experience

Set up customer service for your business.

1 hr 35 mins

Units

- [Begin Your Service Journey](#)
~ 15 mins
- [Administer Service Cloud](#)
~ 20 mins
- [Automate Case Management](#)
~ 30 mins
- [Create Digital Engagement on Multiple Channels](#)
~ 30 mins

Click on Take a Tour of Service Cloud for Lightning Experience

This is what learning looks like on Trailhead. You'll see plenty of screenshots, videos, hints & tricks and finally a multiple-choice quiz at the end to test your Salesforce savvy-ness!

JOIN THE GETTING STARTED COMMUNITY

Once you start blazing trails, it's time to learn from the best of the best. To do that, all you need to do is join our **Trailblazer Community**. Here you will have direct contact with some of the brightest minds at Salesforce and our fantastic customers (like you!) who have piles of knowledge to share. Get to know these great people to learn best practices, answer tough questions, or learn an innovative new way to interact with your customers!

1. From Service Setup Home, locate the **Recommended Setup** items list on the right.

Click **Join the Getting Started Community**.

Note: You may need to close your current Trailhead tab to get back to your org

Setup

Search

 Join





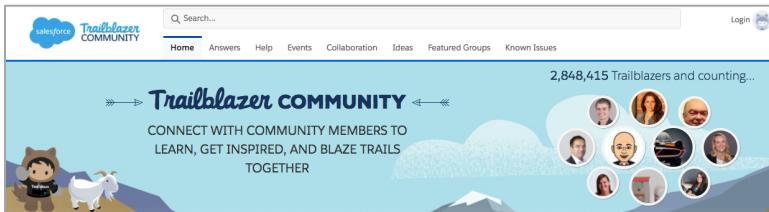
Join the Getting Started Community[Open a new window](#)

Share ideas and find answers to your Service Cloud questions.

2. A new browser tab will open with the Salesforce Trailblazer Community.

Click **Login** to get started.

Note: Login using your own personal Salesforce credentials, not the trial org credentials we've been using today during the Campfire. If you don't have any, then sign up directly with your email address.



Glossary

DIALOGS

Dialogs are conversation snippets that control what your bot can do. You can associate every dialog with a dialog intent (see below) which can be trained to understand variations in customer input. During a conversation with a customer, your bot moves between several different dialogs. Each dialog handles a portion of the conversation. For example, Welcome, Main Menu, Order Status, Location and Hours, and Transfer to Agent are individual dialogs that a customer might experience as part of a single conversation with your bot. A dialog can contain any combination of four different types of elements:

ACTION

Retrieve data and display it to the customer, retrieve external data from a third-party API, run an Apex class or start a Lighting Flow, add an Action element to the dialog.

MESSAGE

To send a message from the bot to your customer, use the Message element. Messages can be merged with Variables.

QUESTION

To gather information from a customer, add the Question element to the dialog. Use Variables (see below) to store their answers.

RULE

Use Rules to specify the conditions that start any of the

following actions: call a dialog from within the current dialog, redirect to a different dialog, clear a Variable, transfer to an agent, and save information from fields in prechat forms to specified Variables.

ENTITIES

Entities are pieces of information to collect from customers. We provide the following system entities: Text, DateTime, Date, Money, Number, Person, Location, Organization, Percent, Boolean, and Object (standard Salesforce or custom). You can create your own custom entities as needed.

INTENT

Intents are the customer's reasons for interacting with your bot. For example, booking a flight, changing a flight, getting store hours. Associate intents with your dialogs. Then train the bot to create a learning model that your bot can use to understand intents. If your customers interact with your bot by typing a message in the chat window, use intents to help your bot understand what they want.

NATURAL LANGUAGE PROCESSING (NLP)

Source: Wikipedia

Natural language processing (NLP) is an area of computer science and artificial intelligence concerned with the interactions between computers and human (natural) languages, in particular how to program computers to process and analyze large amounts of natural language data.

NATURAL LANGUAGE UNDERSTANDING (NLU)

Source: Wikipedia

Natural language understanding (NLU) is a subtopic of natural language processing in artificial intelligence that deals with machine reading comprehension. Natural language understanding is considered an AI-hard problem.

VARIABLES

A Variable is a container that stores a specific piece of data collected from the customer. Each Variable must be associated with an entity (see above). Since Variables are containers of information, they can be used within dialog actions as both inputs and outputs and can be inserted as part of the text in messages.

EINSTEIN BOTS

