salesforce service cloud

HANDS-ON WITH EINSTEIN BOT BUILDER

FIELD GUIDE

HANDS-ON WITH EINSTEIN BOT BUILDER

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

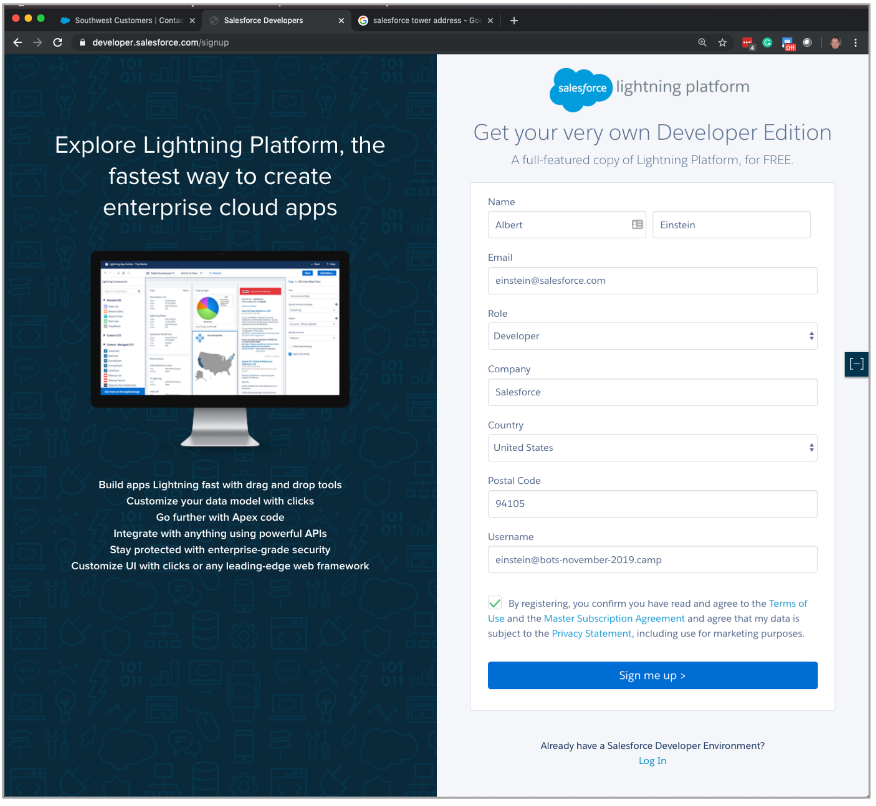
SIGN UP FOR A DEVELOPER EDITION ORG

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

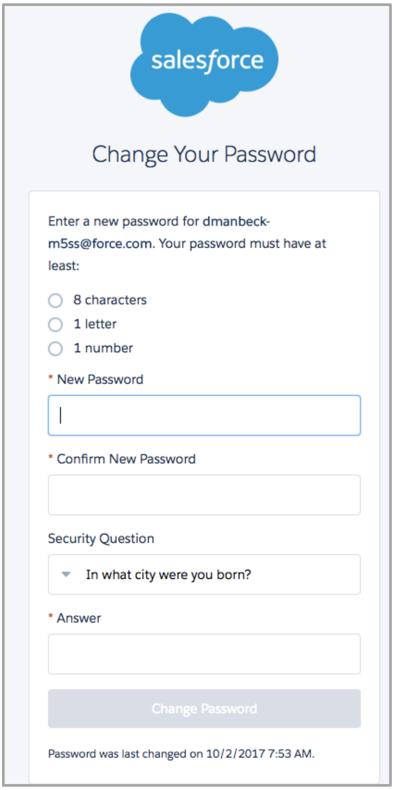
   Note: Be sure to use an email address that you will be able to access now and throughout the event today, as you will need to verify your email address to complete the sign-up process.

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

   yourlastname@bots-month-year.camp

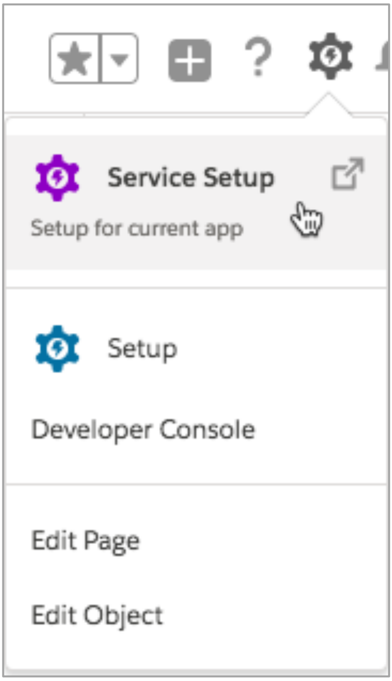


2. You will receive an email to verify your account. After you click Verify Account, you will be asked to create a password along with a security question.

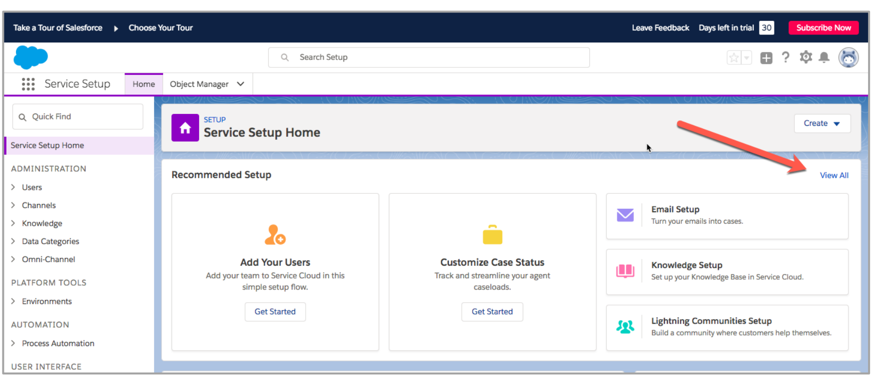


3. You'll then arrive at the Developer Edition **Welcome Mat**.

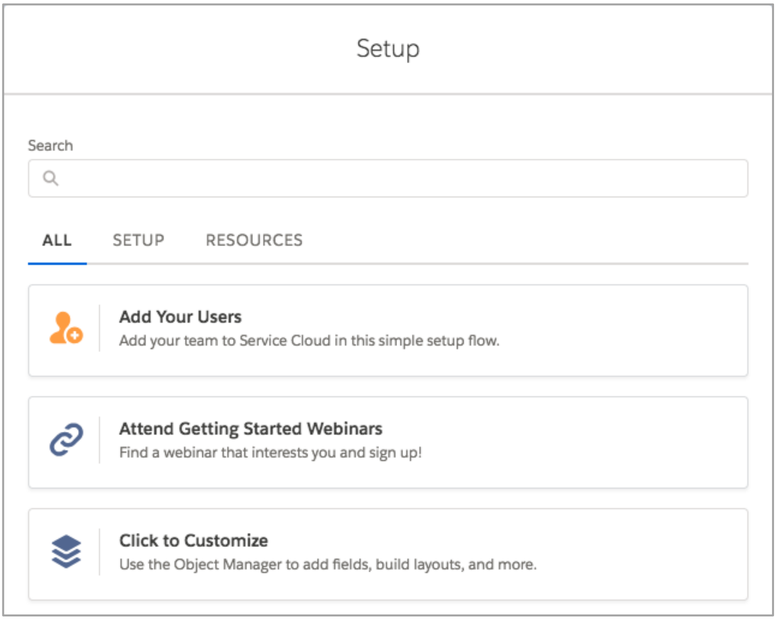
4. From **Setup Home**, navigate to the upper right corner of your screen, click on the cog and select **Service Setup**.



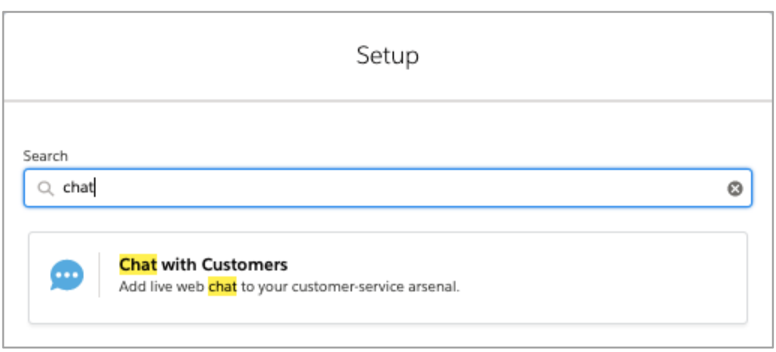
5. Find the **Recommended Setup** section and click the **View All** link in the upper-right corner.



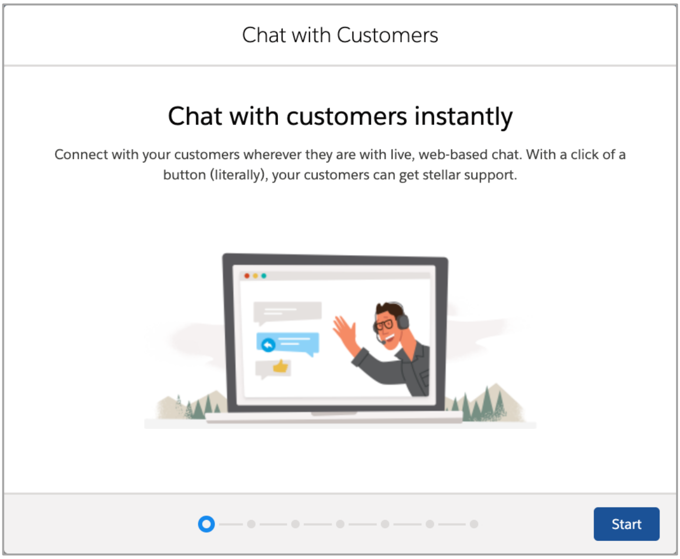
6. A list of guided setup flows is displayed. These make it super fast to set things up in your environment.



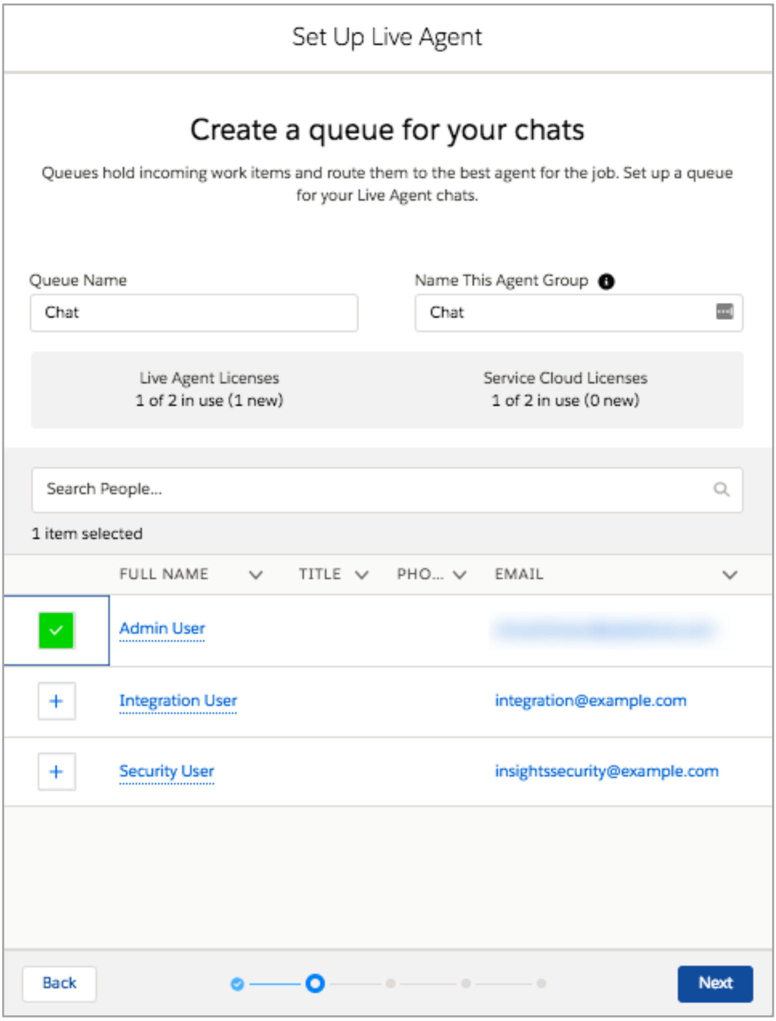
Type **chat** in the Search box to find the Chat with Customers wizard and click it to add chat to your customer service arsenal.



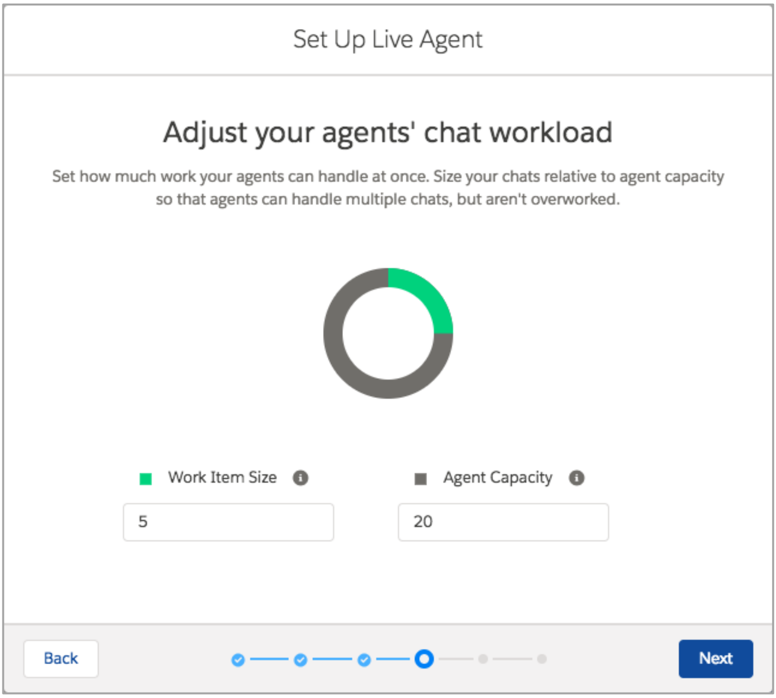
7. Ok, let's get you connected with your customers! We'll use a guided setup to get Live Agent chat and Omni-Channel Routing ready for Einstein Bots. **Click Start.**



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.

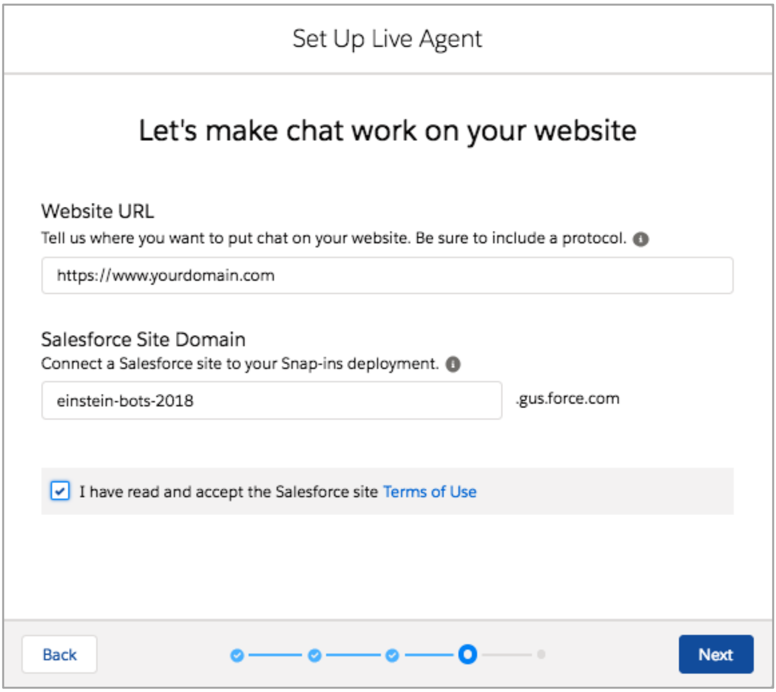


9. We need to decide how much of your agents’ overall capacity should be consumed by each chat request. Most agents can handle 3 or 4 chats at a time, so let’s just leave the default setting and click **Next**.

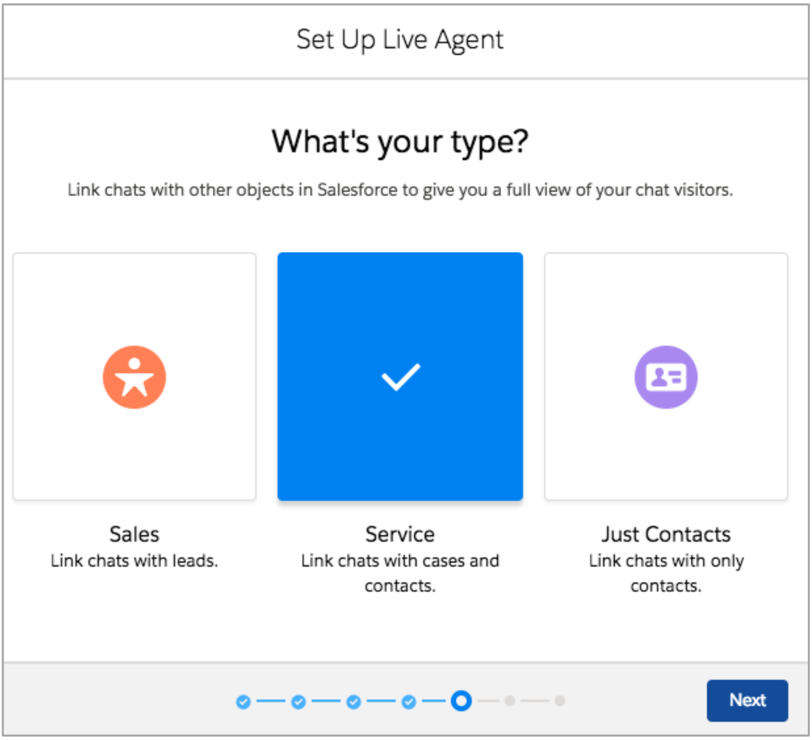


10. The next step is to decide which website you want to use to host your chat button. Don't worry, your Salesforce instance comes with a website we can use for today. You just need to give it a unique name.

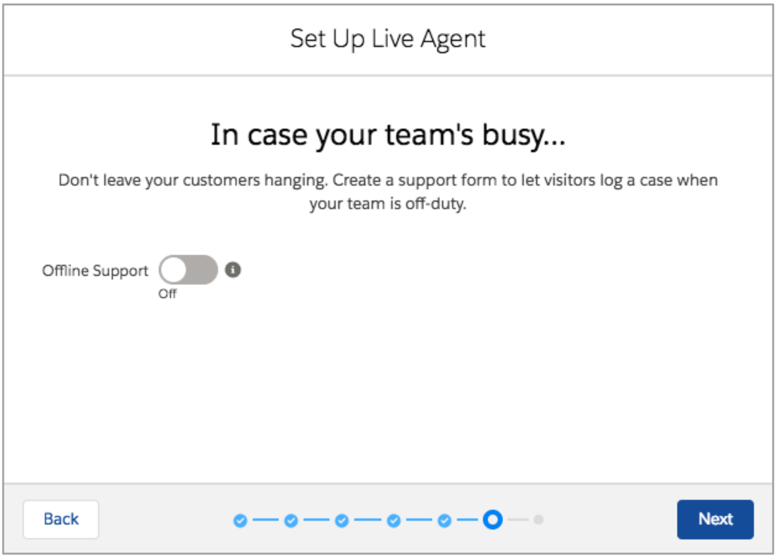
    Enter your company **Website URL.** For the **Salesforce Site Domain** use yourlastnamebotsyear.



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

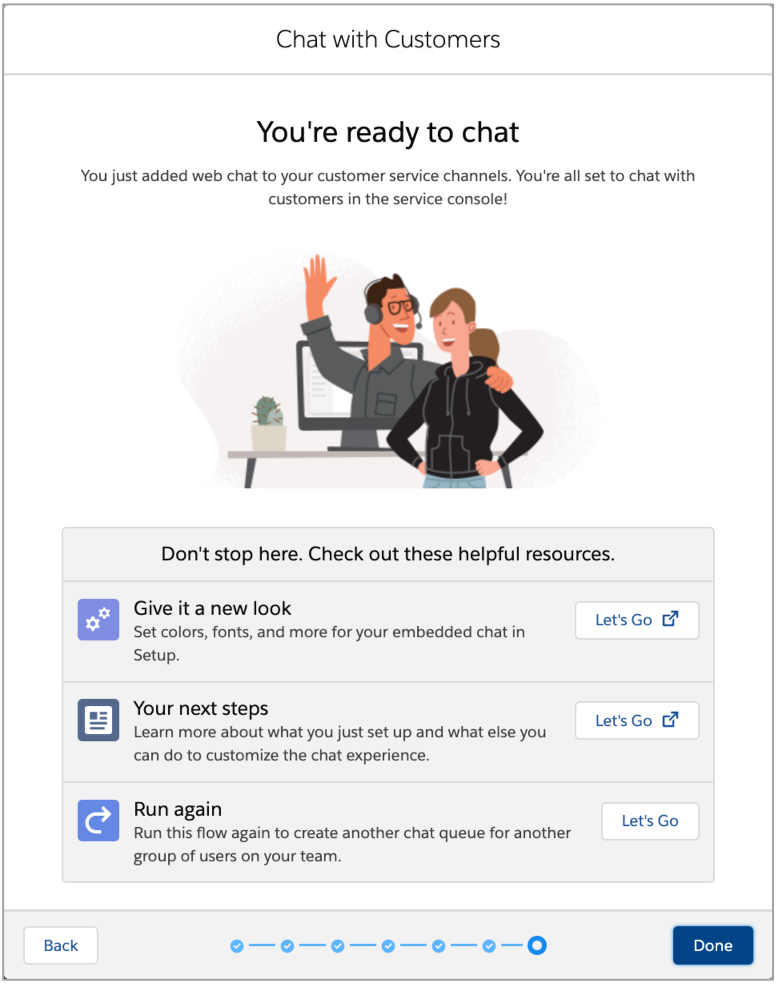


12. Next, we have the option to provide a case creation form when agents are offline. We'll bypass this step for now (We can always change this later if we want).



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**.

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



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.

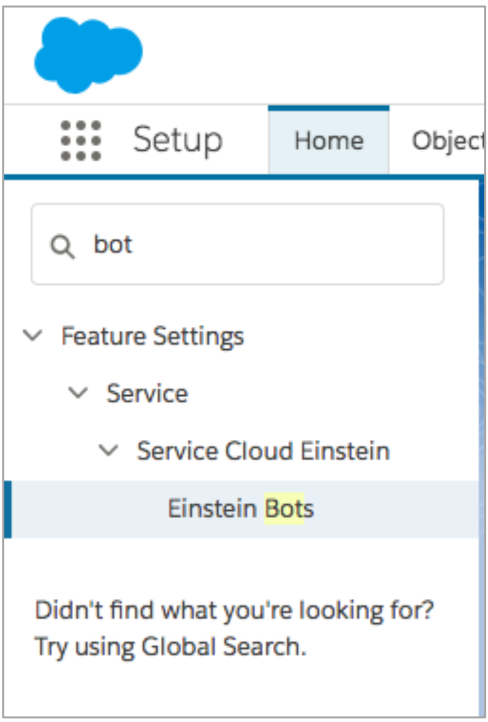
WHAT WE'LL BE WORKING ON

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

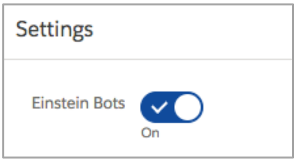
ENABLE EINSTEIN BOTS

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.

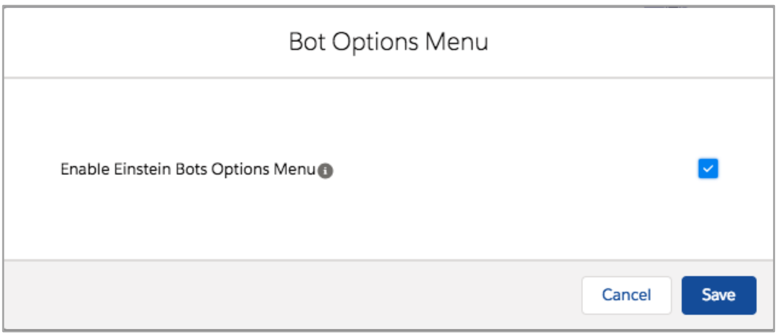
1. If you aren't already there, navigate to the upper right corner of your screen, click on the cog and select **Service Setup**.
2. Look for the Quick Find box in the upper left corner of your screen and search for the word **bot.** Click on **Einstein Bots** setup node.



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



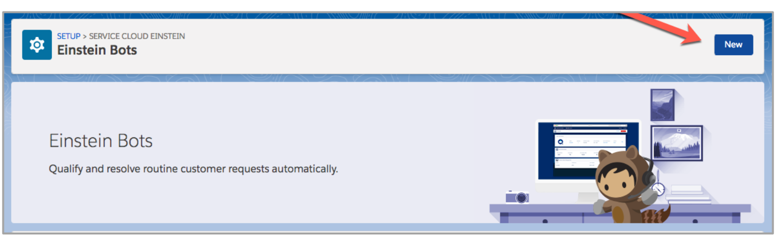
4. Now we need to enable the Bots option Menu. This will allow your bots to present menu options to your customers.



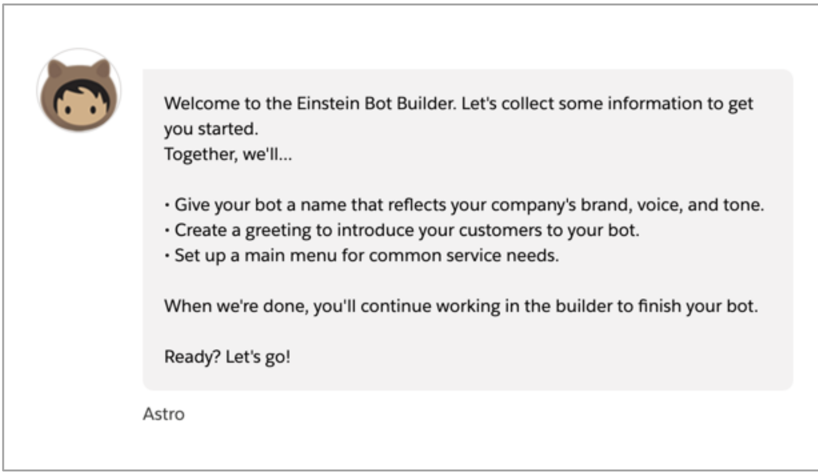
CREATE AN EINSTEIN BOT

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

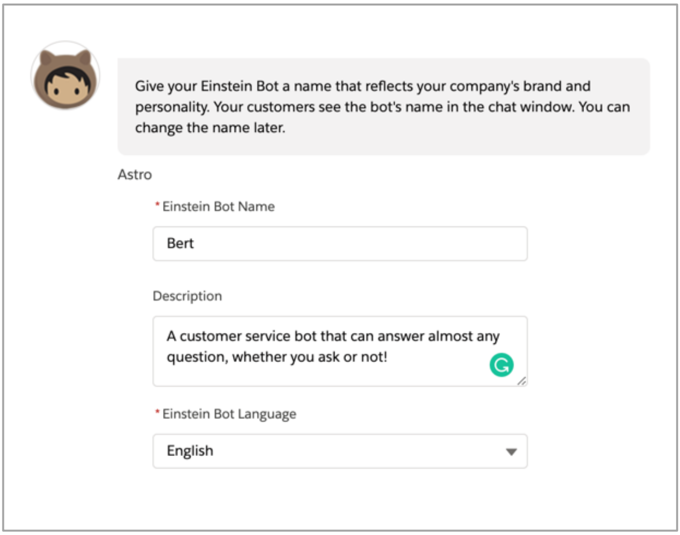
1. Click the **New** button in the upper right corner of the screen to launch the wizard.



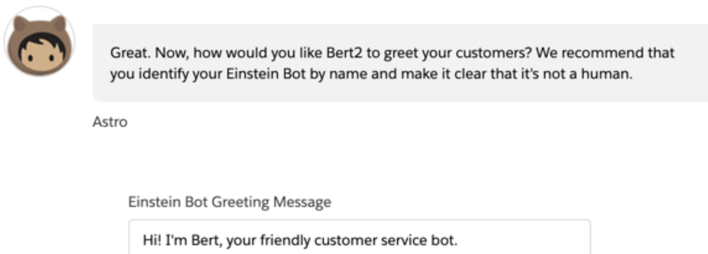
2. The new bot wizard is the fastest way to get started with bots. It will do all of the heavy lifting for us, but we'll need to enter a few basic parameters to get going.



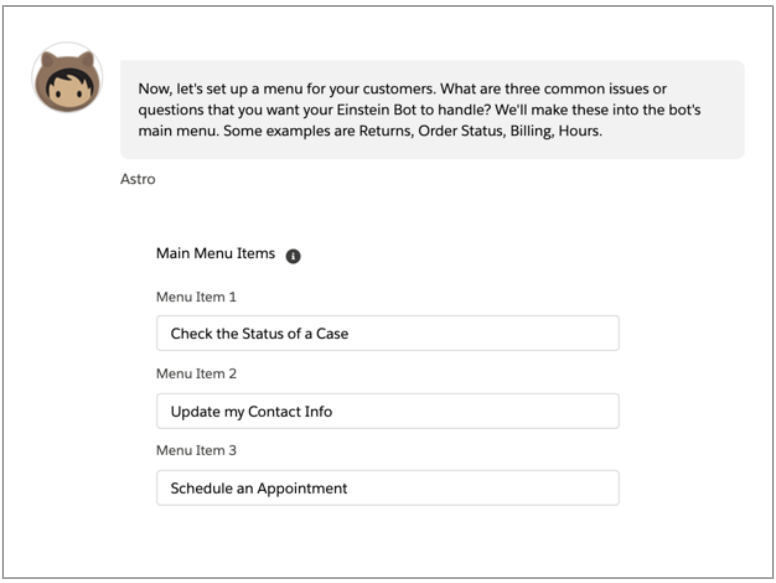
3. To start, let's give your bot a name and a brief description of its main purpose. Pick a bot name and type in the description: **A customer service bot that can answer almost any question, whether you ask or not.**



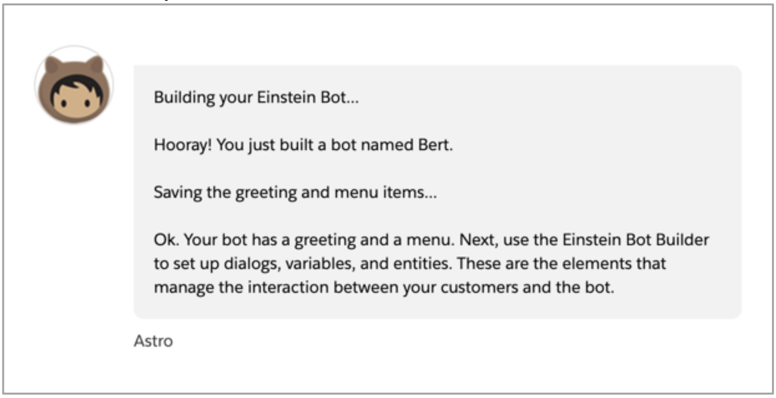
4. Next, let's teach your bot some manners and create a welcome message to greet customers. Make sure to let them know they are chatting with a bot so your customers know they have officially arrived in the age of robotic artificial intelligence! Enter: **Hi! I'm** *<YOUR BOT NAME HERE>*, **your friendly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



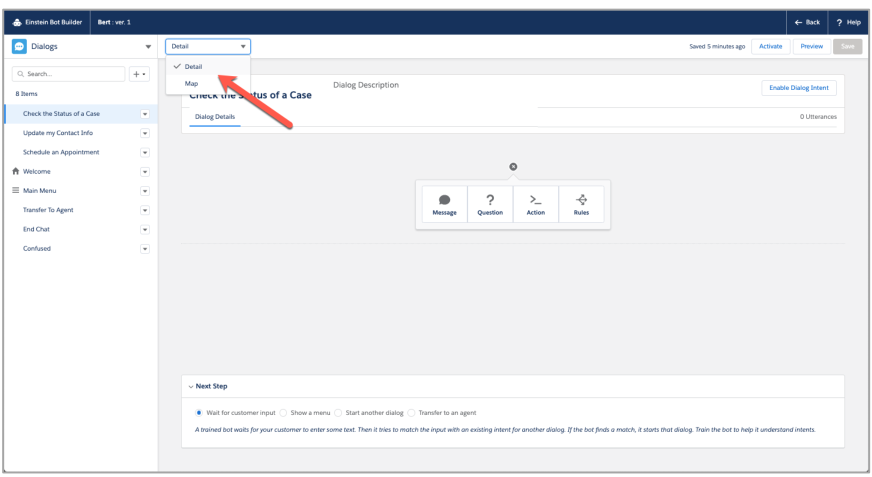
5. Your customers may not know what to do with all of the power and convenience that come with AI-driven bots. Create a menu to give them a sense for some of the things your bot can do for them faster and more conveniently than any other option. We'll be using the menu items in this example throughout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



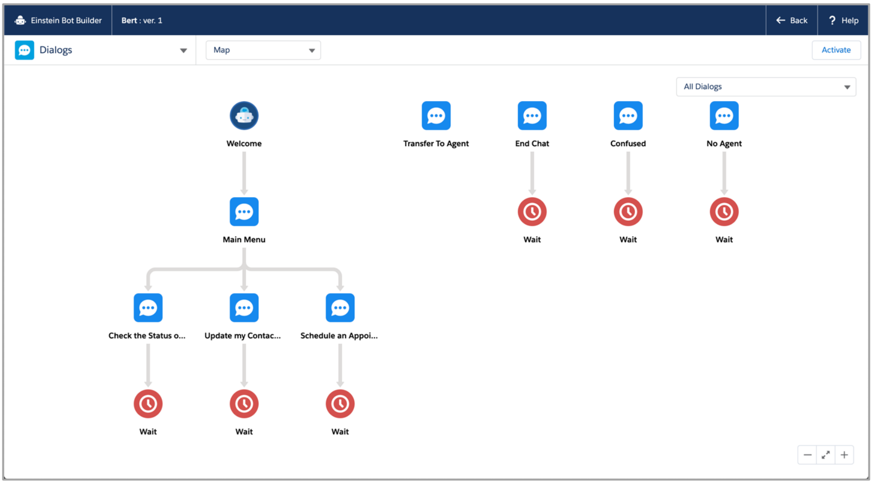
6. Now sit back and relax while the wizard magically creates the chat bot for you!



7. 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.



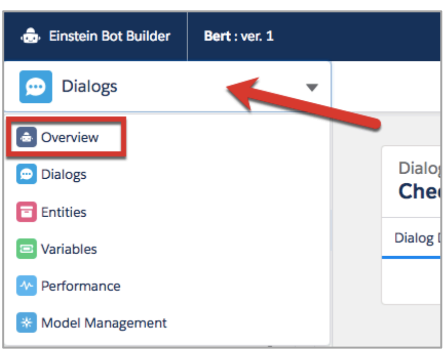
8. Map view makes it easy to see how all of the various Dialogs connect with one another to construct the perfect customer experience for your business.



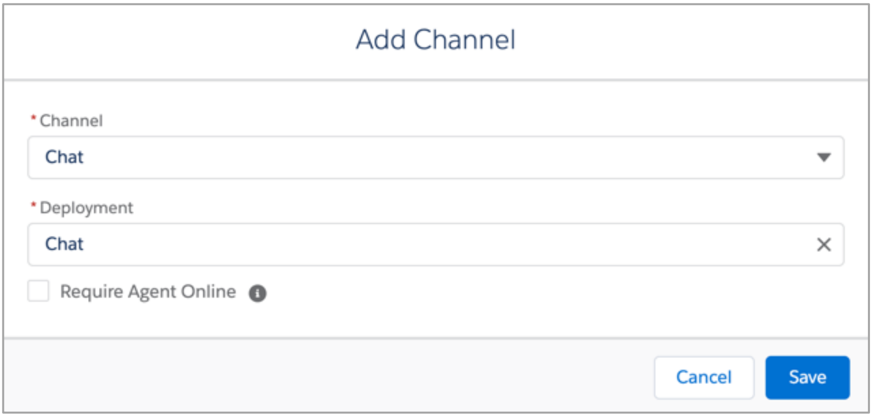
ADD YOUR BOT TO A CHAT BUTTON

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.

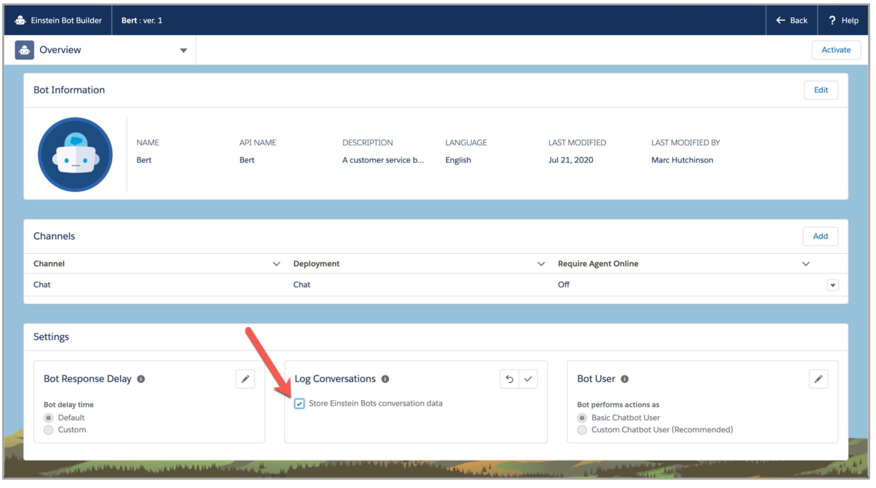
1. To do that, click on ‘Dialogs’ in the upper left of the screen and select “Overview” from the drop down.



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.



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!



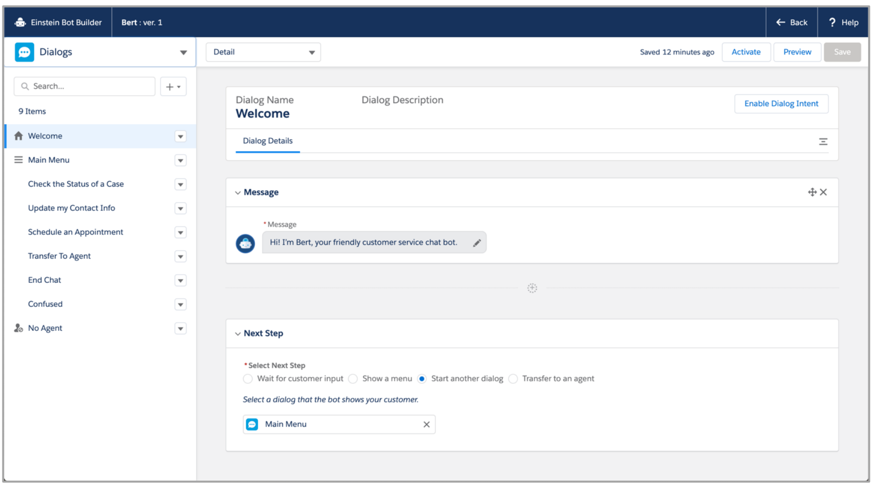
4. That was easy! Ready to take your bot for a test drive? Let's do it!

TEST YOUR BOT

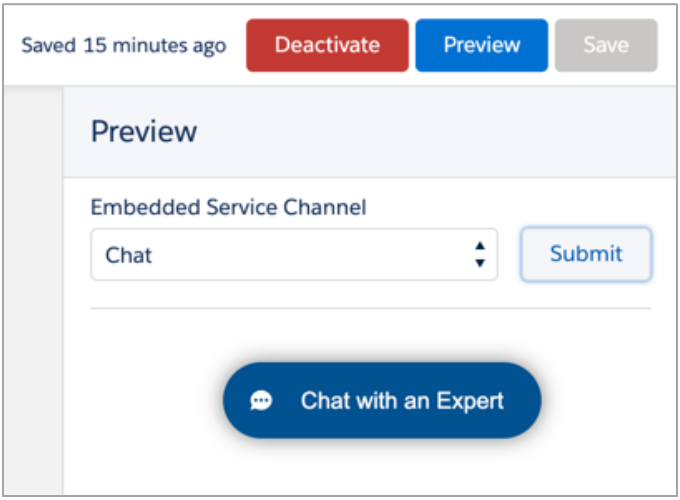
Now let's just make sure your bot is working properly and try some of the features we've enabled so far. Testing your bot is easy! You don't even need to use a website to get started, since the Einstein Bot Builder includes an awesome Preview tool to chat with your bot whenever you want to. Here's how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

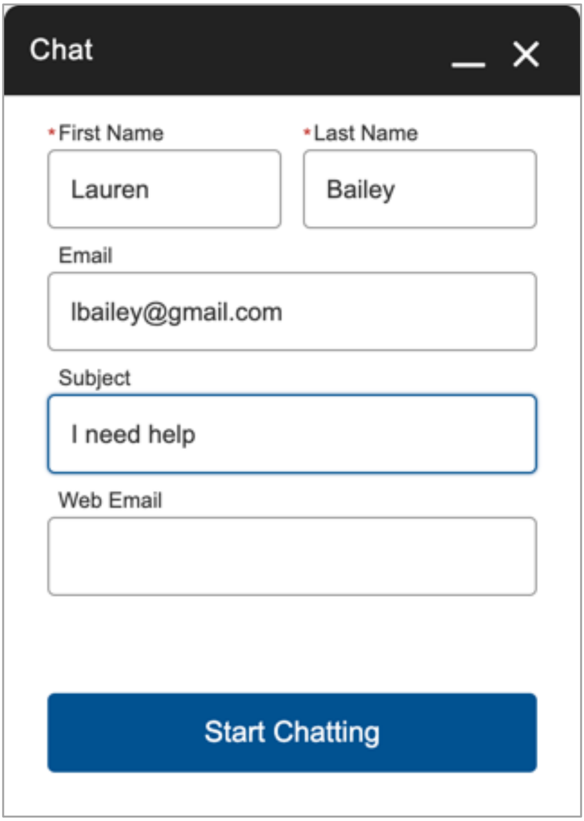
2. The Dialogs tab gives you access to all of the things your bot knows how to do and say. During a conversation with a customer, your bot moves between several different dialogs. Each dialog handles a portion of the conversation. The wizard already created some dialogs to get your bot started. For example, 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.



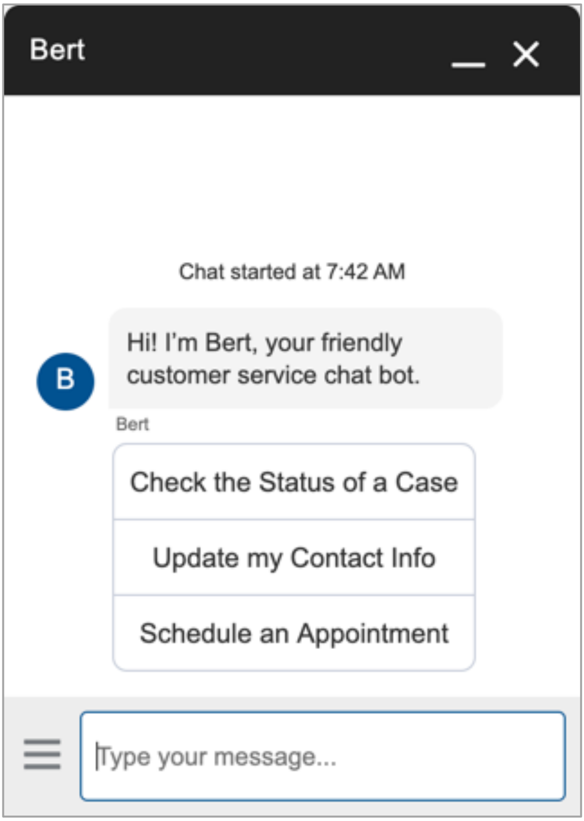
3. To test the things we've added to the bot so far, look in the upper right corner of the screen. Click **Activate** and then click **Preview**. The Preview tool is the easiest way to chat with your bot and test changes that you make along the way. Click **Submit**, then **Chat with an Expert** to test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



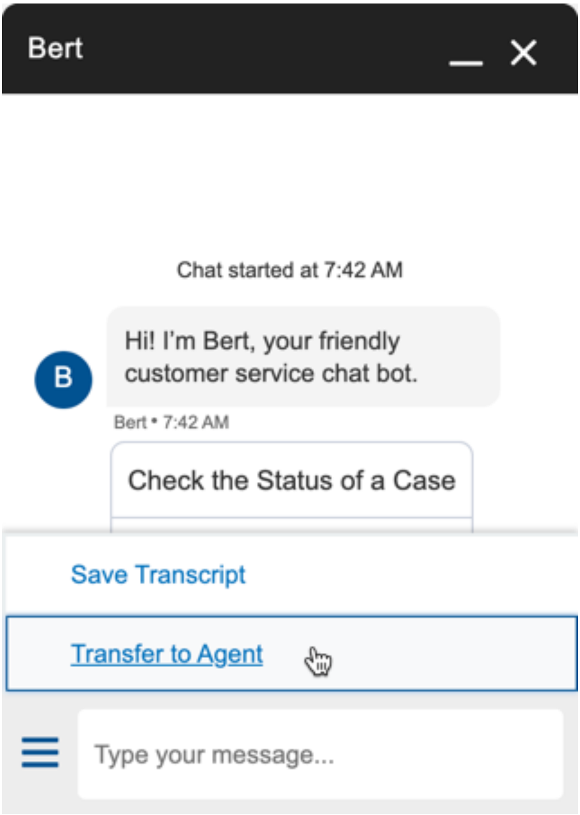
4. Fill out the pre-chat form as shown below. Your bot needs these details to get started, but you can always remove them or add new fields to the pre-chat form later if you like.



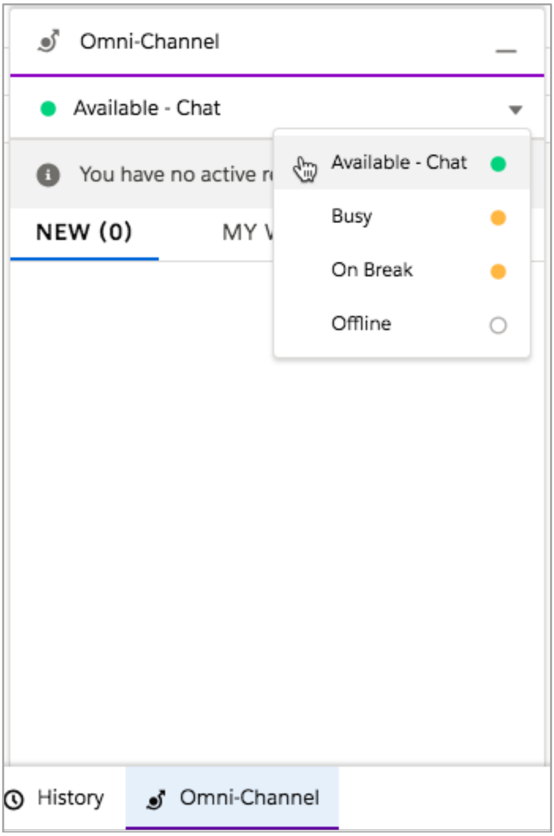
5. Click the **Start Chatting** button. You should now see your bot display your welcome message and your clickable/tappable navigation menu:



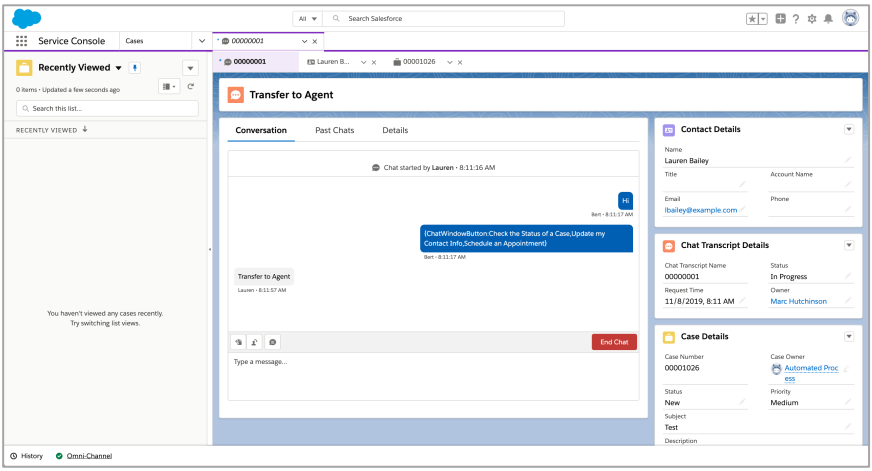
6. Check out the Bot Options Menu  in the lower left corner of the chat. It's a great place to display quick, convenient links for your customers.



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 bowser 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

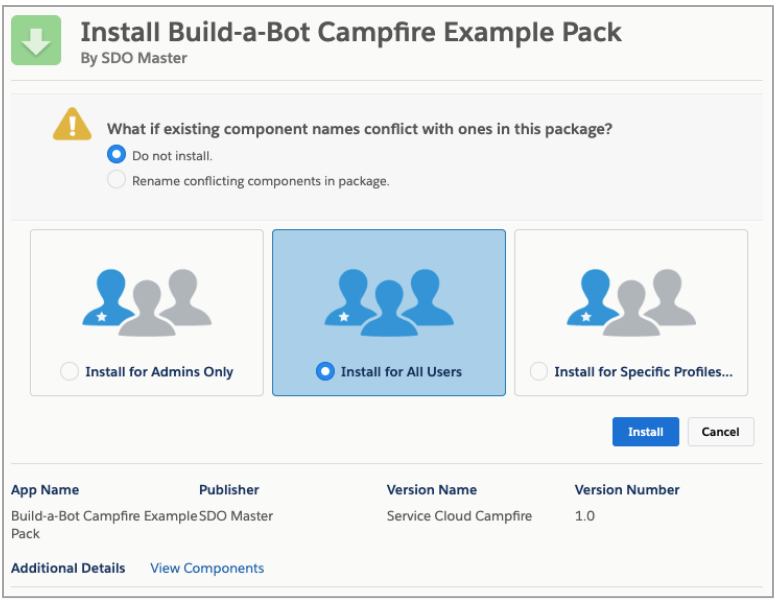
A LITTLE BIT OF PREP

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**.

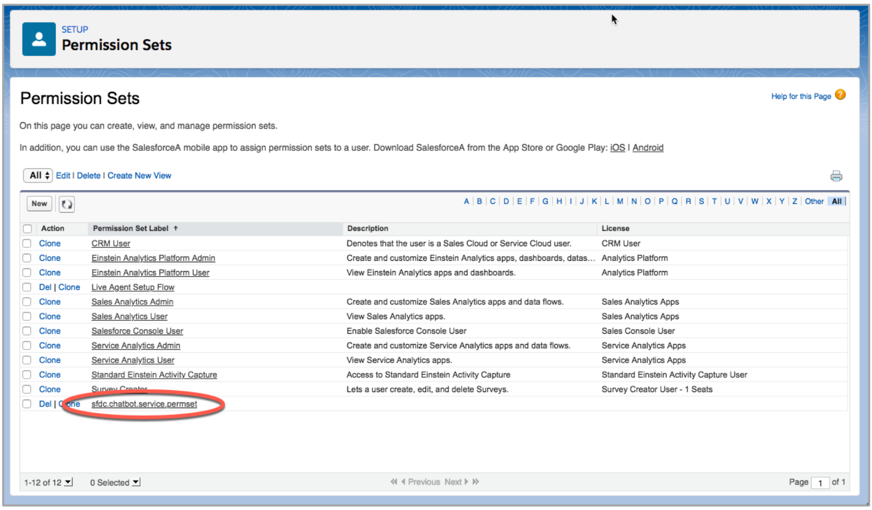


3. Give it a minute to finish installing and then click **Done**!

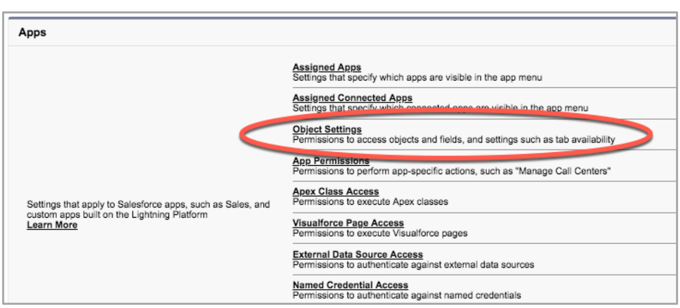
PERMISSION YOUR BOT

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.

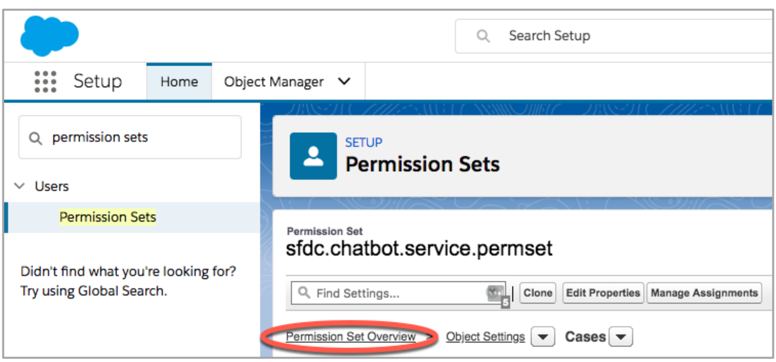
1. Navigate to Lightning Setup and use the Quick Find box in the upper left corner of the screen to search for **Permission Sets**. Click on the Permission Set named <u>sfdc.chatbot.service.permset</u>



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



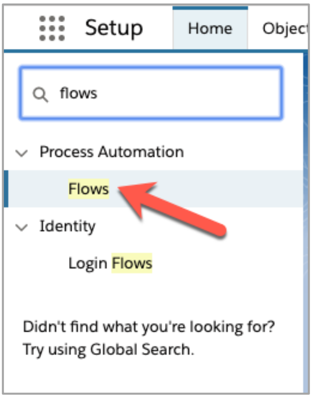
3. Your bot will need access to the following Objects and Fields:
   a. **Chat Transcripts**
      i. Object Permissions – Read, View All
      ii. Field Permissions – **Contact Name** (Read)
   b. **Contacts**
      i. Object Permissions – Read, View All
      ii. Field Permissions – **Phone** (Read + 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.



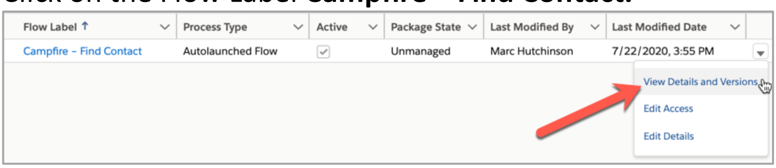
5. Click on the Apex Class Access link

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**.

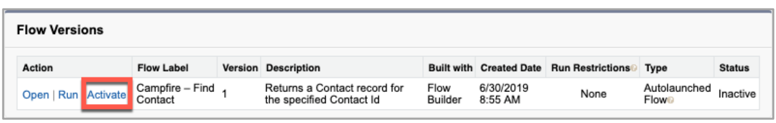
7. Look for the Quick Find box in the upper left corner of your screen and search for the word **flows**. Click on **Flows** setup node.



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



9. Click **Activate**.

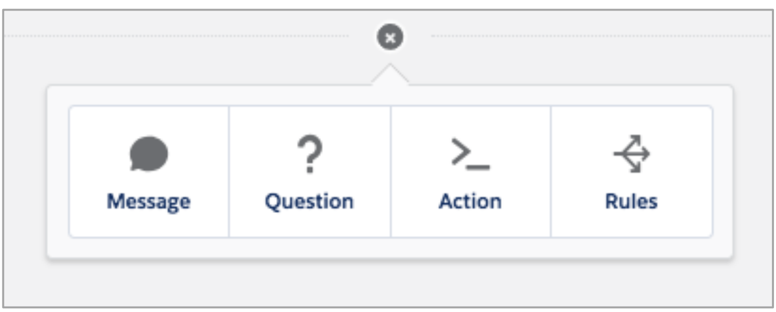


All set! Your bot can now access a little bit of customer data and some example actions!

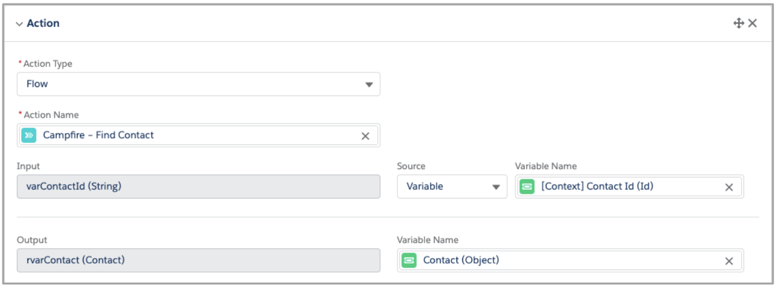
CHECK CASE STATUS

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.

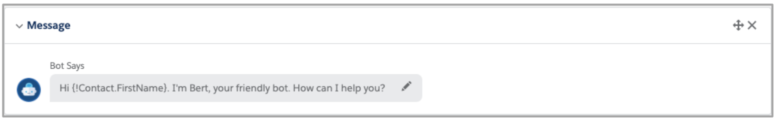
1. In the Quickfind box, type **bots**, and select the **Einstein Bots** setup node.
2. Click the down arrow at the right of your bot and select Edit.
3. Click the red Deactivate button – because we can't edit an active bot!
4. Select the **Welcome** Dialog and click the (+) See those tiles for Message, 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!



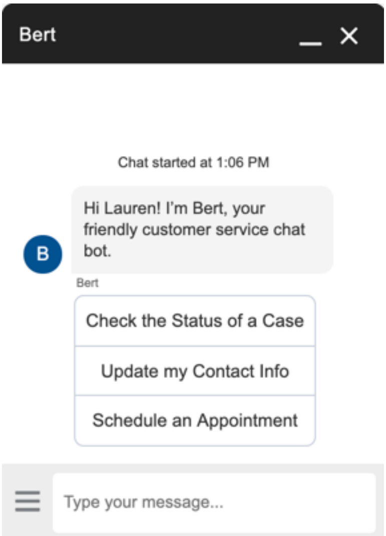
5. Let's use an **Action** block to retrieve a Contact record. Let's Create an Action of type **Flow**. <u>Be sure to insert it above the existing Message block.</u> In Action Name select **Campfire – Find Contact**. For your Input Variable varContactId, select **[Context] Contact Id (Id)**. For your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



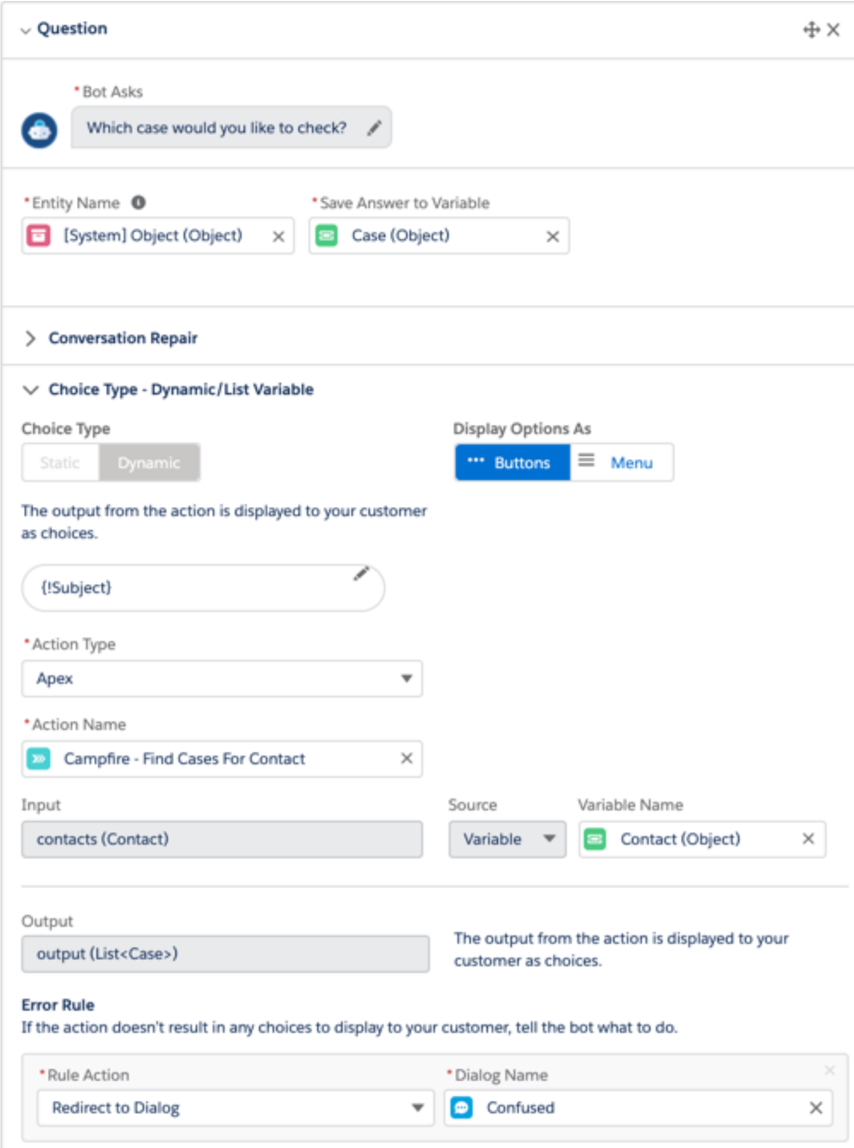
CHECK CASE STATUS

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.

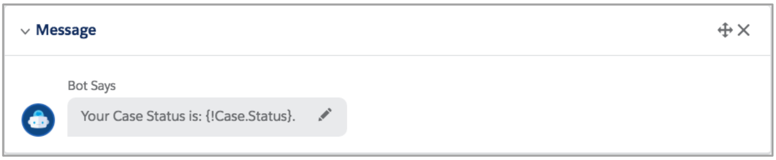
   Bot Asks: **Which case would you like to check?**

   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}**.


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
Static
Dynamic
Display Options As
Buttons
Menu
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

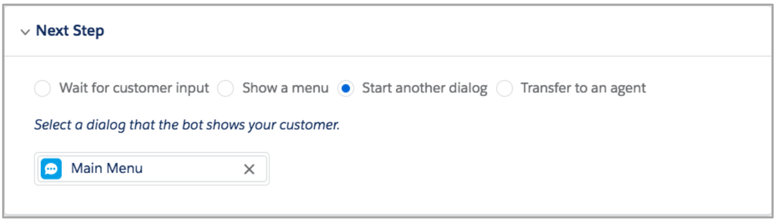
2. Now we can simply display the **Status** field in a **Message Block** based on the Case your customers select.

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



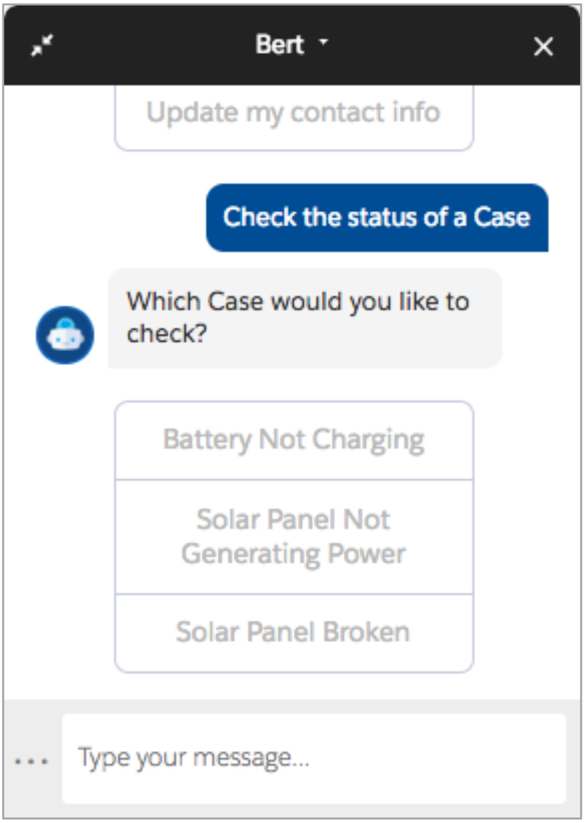
3. Add a rule to clear the Variable for the **Case (Object)** to allow checking the status of another case. Do not clear any of the other Variables. These do not change throughout the session and will be used in other Dialogs later.

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

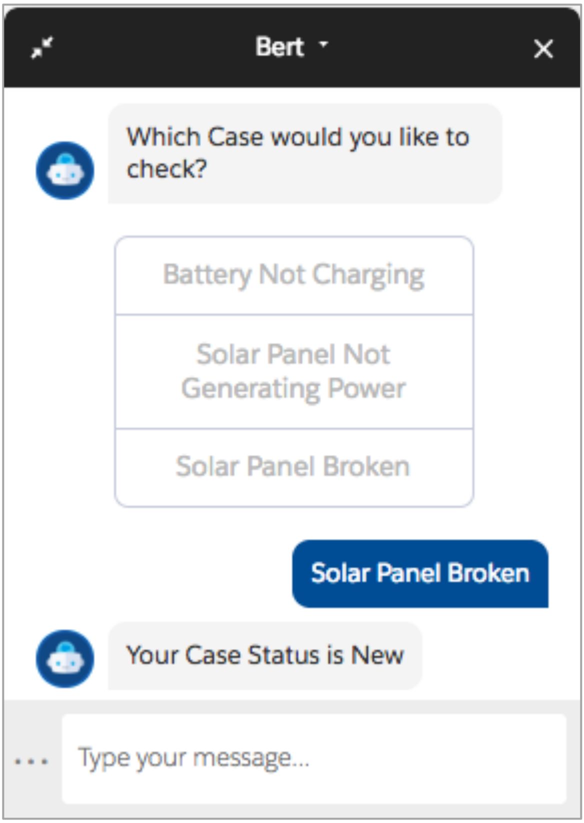


5. Click **Save** and **Activate** your bot so that we can test this.

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.



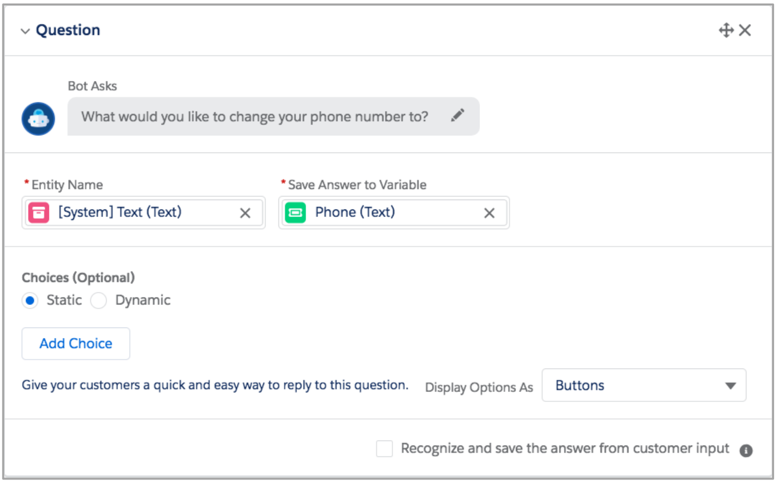
UPDATE CONTACT INFO

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.

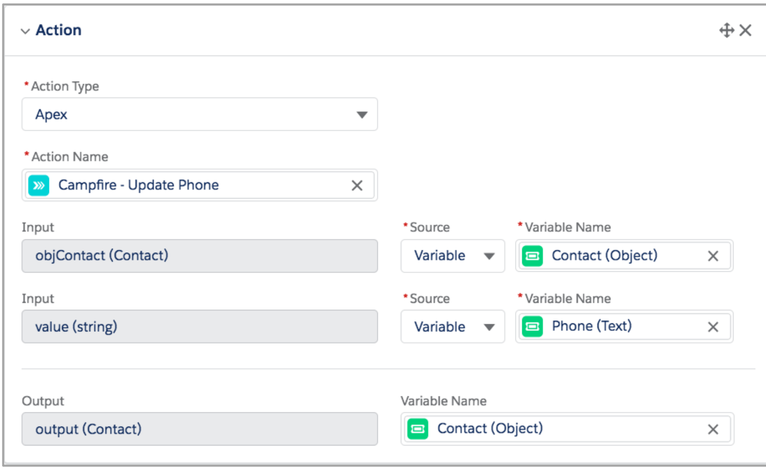
1. Click on the Dialog named **Update my contact info** and add a new **Question** block to let your customers enter their new phone numbers.

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

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

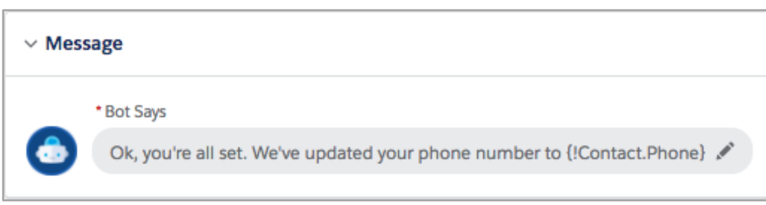


2. Next, we'll use the **Update Phone** Apex Action to update the Phone field in the CRM database.

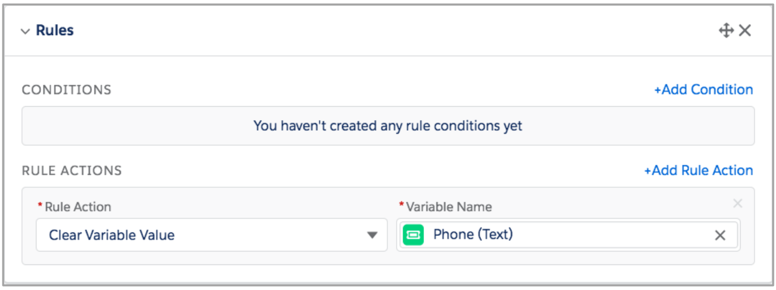


3. And finally, we will display the new phone number we've captured from them after writing it to the CRM database. Add a new **Message** block and enter:

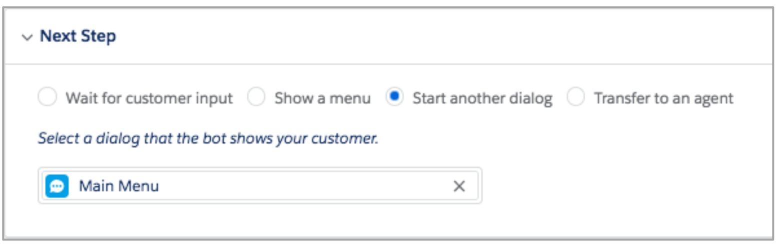
   Bot Asks: **OK, you're all set. We've updated your phone number to {!Contact.Phone}.**



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.

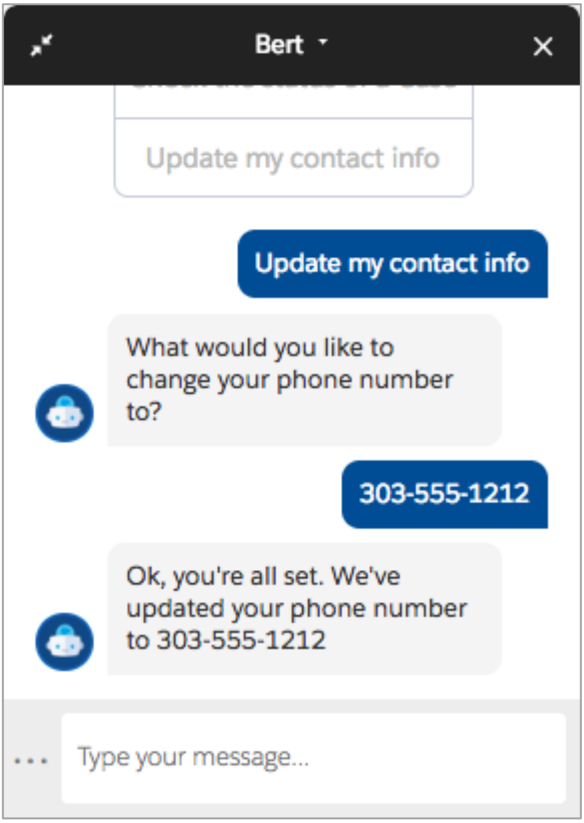


5. Don't forget to redirect the customer back to the Main Menu so they know what to do next.



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

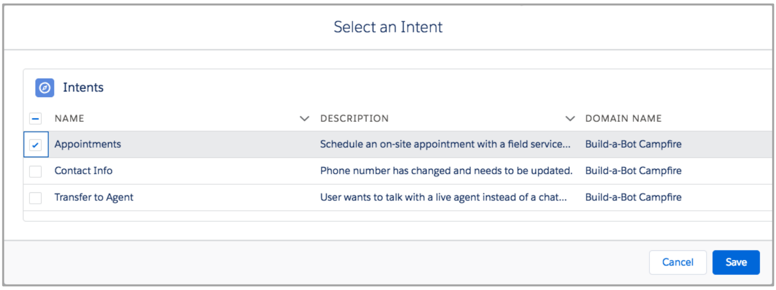
We'll begin this exercise in the **Einstein Bot Builder** where we can teach our bots to understand customers who want to schedule an appointment, update their contact info or transfer to an agent.

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 tub 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.

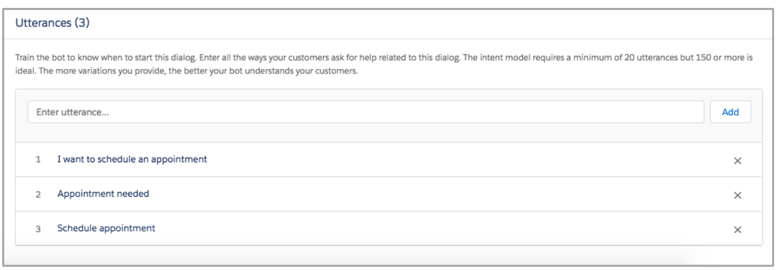
4. Let's start by clicking the **Add Intent** button to add a collection of customer utterances that we loaded at the beginning of Trail 3.

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

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

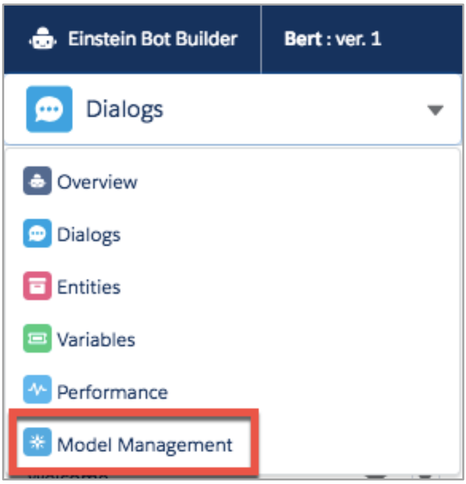


6. Next, click on the Utterances panel to add our own utterances. Type in 4-5 examples of the types of things your customers might say to the bot when they want to schedule a new appointment. **<u>Make sure you hit the return key to add your text to the list before clicking Save!</u>**



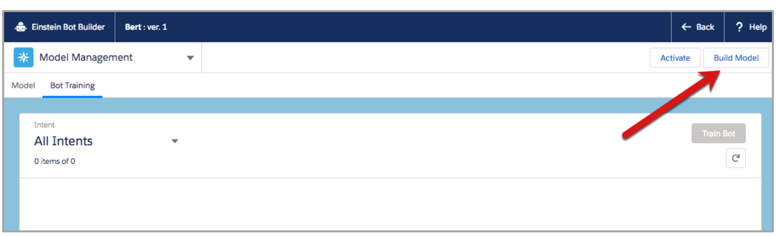
7. Be sure to flip the Einstein switch in the upper right corner of your screen to the **On** position. This will tell our bot to use AI to determine customer intent rather than an exact match of the utterances we've added.

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.

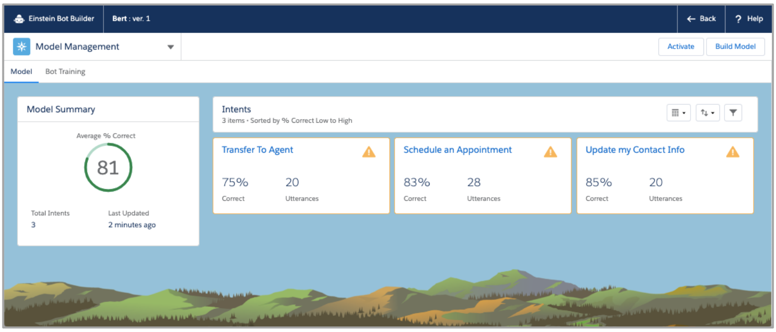


Train the bot by clicking **Build Model** in the upper right corner of the **Model Management** section.

Note: The training process takes several minutes to complete.

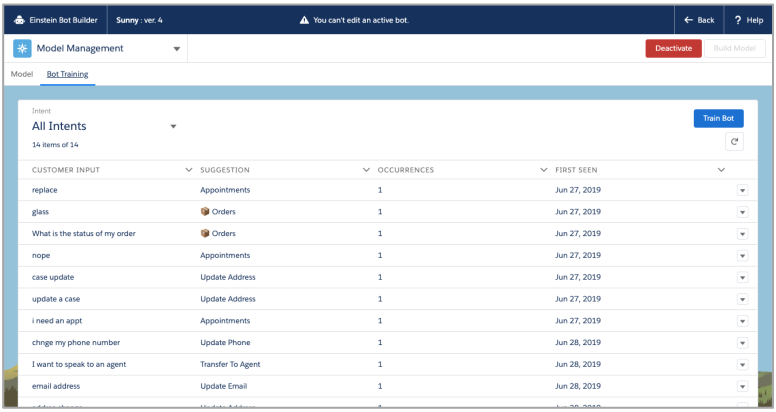


10. Once training has completed, you will see a helpful dashboard appear with training tips on how to make your bot more accurate.

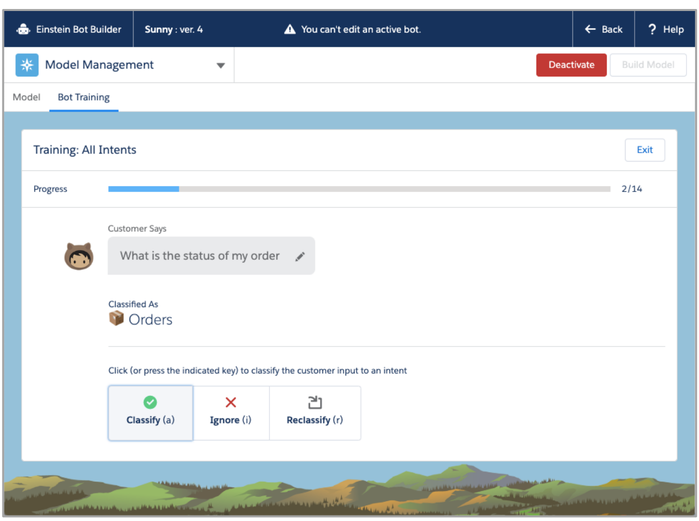


CHECK THIS OUT TOMORROW

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



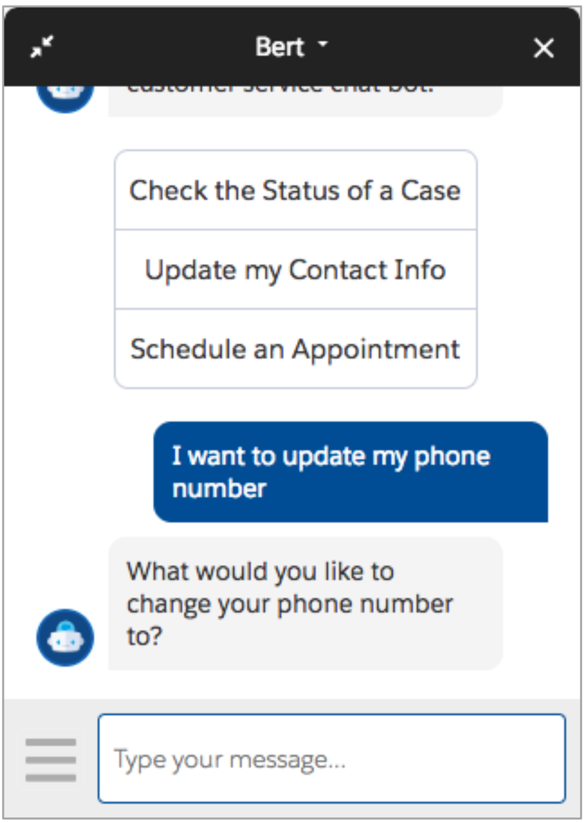
2. Click the **Train Bot** button to walk your bot through the training wizard and help make it even smarter!



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.

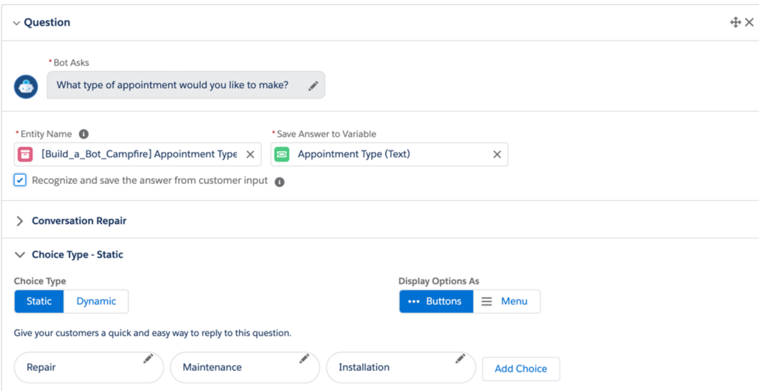
   *Note that **[Build_a_Bot_Campfire] Appointment Type (Text)** is a custom Entity Type that we installed with the package at the beginning of Trail 3. Basically, it is a collection of synonyms for things people say for Repair, Maintenance and Installation appointments. You can explore it by navigating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

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:

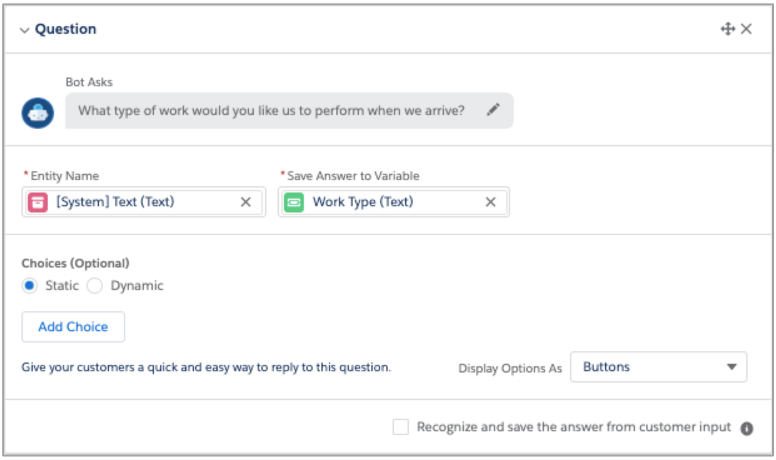


5. Let’s add another question to ask what type of work the customer want us to perform when we get there.

   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.

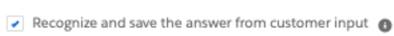
Your Question Block should now look like this:



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?**

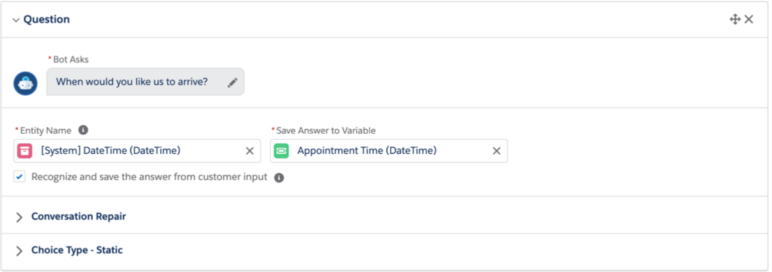
8. Select the **[System] DateTime (DateTime)** Entity Name and create a new Variable called **Appointment Time (DateTime)** to help our bot remember the preferred date and time.

9. Let's check the 

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!

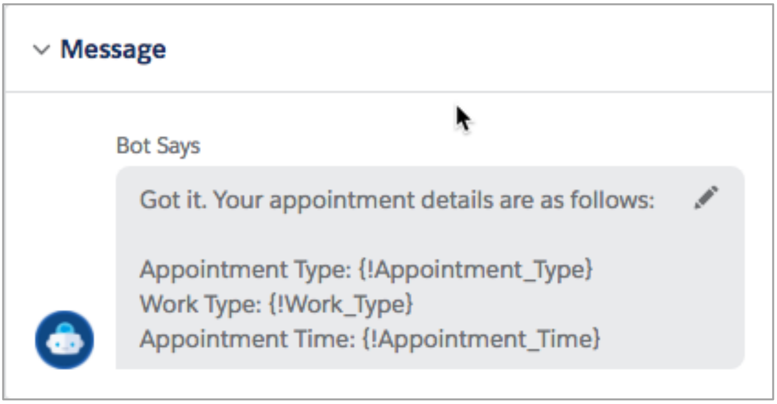
Your Question Block should now look like this:



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}

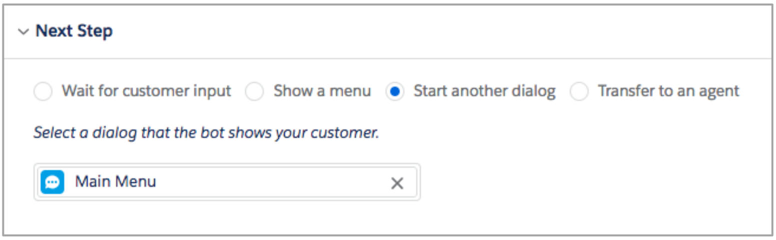


11. Because Variables keep their values throughout the whole bot session, we need to clear some Variable values and allow your customer to book more than one appointment.

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

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:

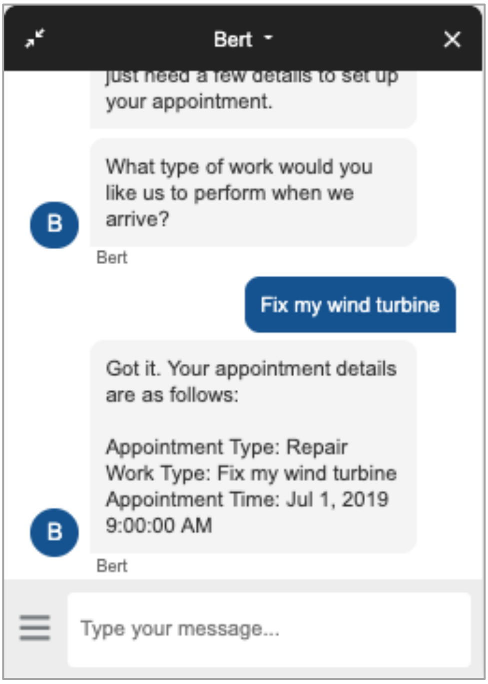
    

13. Click **Save** and **Activate** your bot so that we can test this.

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!

Trailblazer COMMUNITY

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

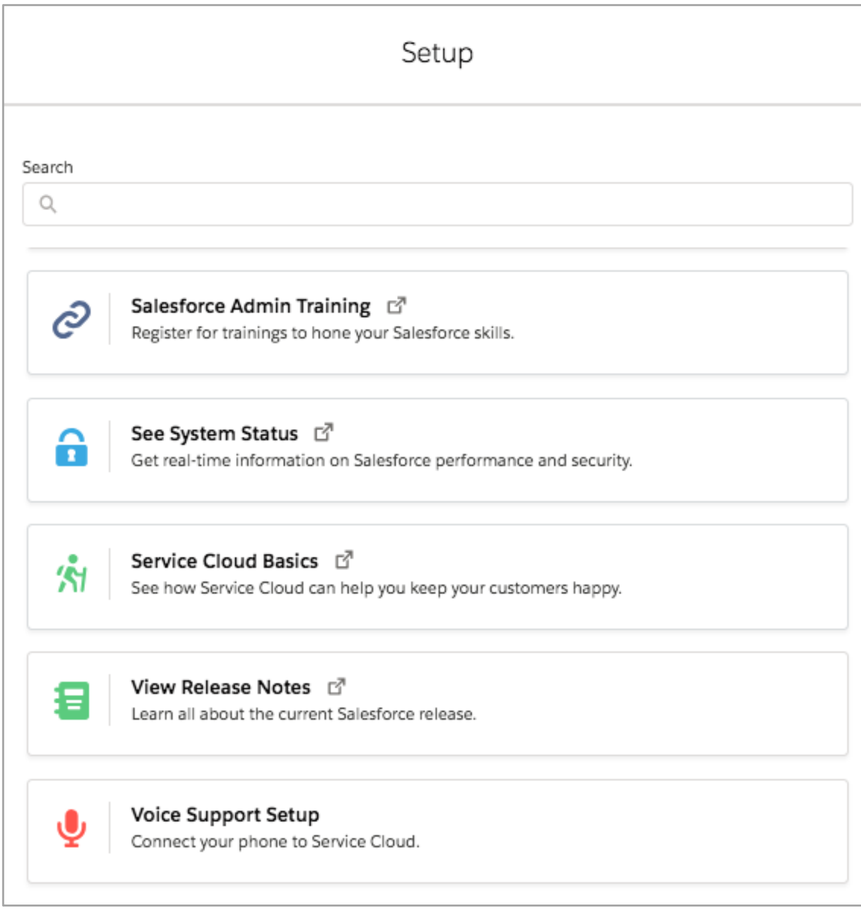
Learning is what we do every day, it's how we grow and how we innovate! Salesforce is making it easy for you to learn! Gone are the days of boring manuals and documentation. We're making learning fun with **Trailhead**!

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

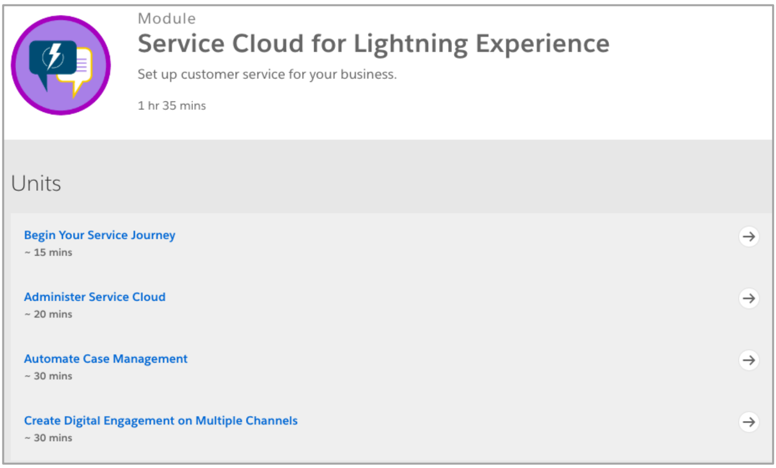
1. From Service Setup Home, locate the **Recommended Setup** items list on the right side.

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



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.



   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!

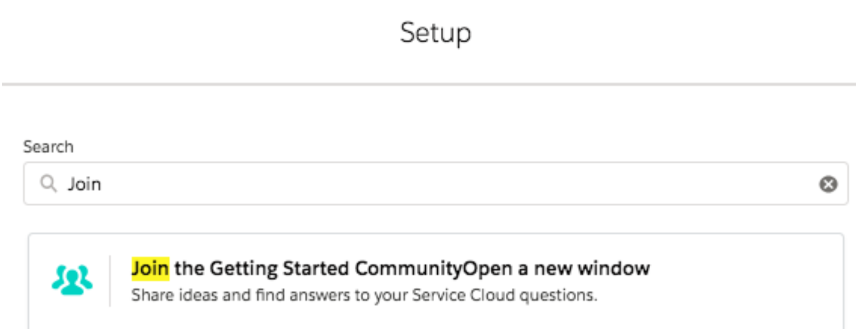
JOIN THE GETTING STARTED COMMUNITY

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



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

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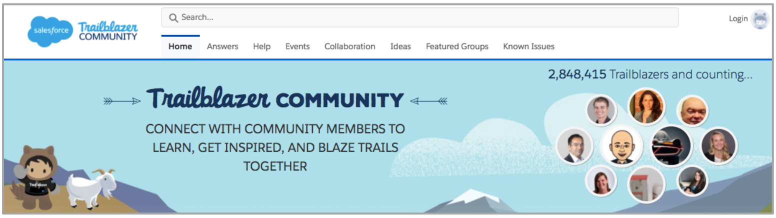


Glossary

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)

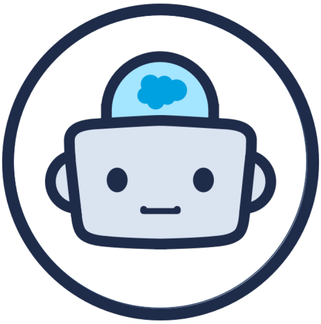
Source: Wikipedia

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



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