

Einstein Next Best Action (NBA)

Purpose

Purpose of this document is to explain how to create an NBA.

Use case

It is based on very basic case of empty email address of the customer (contact) record. NBA checks whether customer email address is empty, it alerts the agent to ask email address and update into the system.

Create an NBA

It consists of four steps.

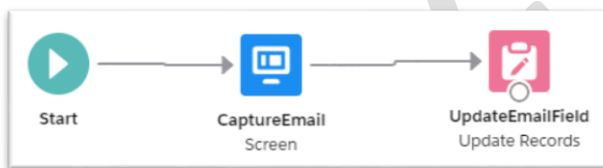
Step 1: create a flow

1.1 Go to quick find and search for Flow. Click on flow under Process automation.

1.2 New flow

1.3 Create

Create flow which looks like one below. Refer to screens below for three Nodes used here.



Edit Screen

captureEmailScreen

Text

Customer Email

Pause Previous Finish

Screen Components

Search components...

- Date & time
- Dependent Picklists
- Display Image
- Email
- File Upload
- Long Text Area
- Multi-Select Picklist
- Name
- Number
- Password
- Phone
- Picklist
- Radio Buttons
- Slider
- Text
- Toggle
- URL
- Display (1)
- Display Text

Get more on the AppExchange

Label: Customer Email

*API Name: Customer_Email

☐ Require

Default Value: Enter value or search resources...

> Validate Input

> Provide Help

Cancel Done

Edit Update Records

Update Salesforce records using values from the flow.

* Label

UpdateEmailField

* API Name

UpdateEmailField

Description

How to Find Records to Update and Set Their Values

☐ Use the IDs and all field values from a record variable or record collection variable
 ☒ Specify conditions to identify records, and set fields individually

Update Records of This Object Type

* Object

Contact

Filter Contact Records

Condition Requirements

Update All Contact Records (No Conditions)

⚠ With no conditions, the flow updates all Contact records.

Set Field Values for the Contact Records

Field	Value
Email	← {!Customer_Email}

+ Add Field

Cancel

Done

1.4 Finally, activate flow by going to detail of flow (by clicking on name of the flow)

Step 2 Create recommendation

2.1 Click on app launcher

2.2 Scroll down to Recommendations link

2.3 New

2.4 Enter name, description, action and other fields. Note that the action is the flow you created in step 1.

New Recommendation

Detail Information

* Name

UpdateEmailIfEmpty

* Description

UpdateEmailIfEmpty

Image

Upload Image

Response Information

* Acceptance Label

Email Provided

* Action

captureEmailScreen

* Rejection Label

Not Provided

Cancel

Save & New

Save

2.5 Save

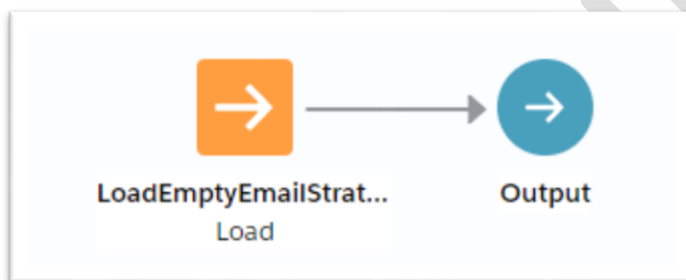
Step 3 create strategy

3.1 quick find Next Best Action

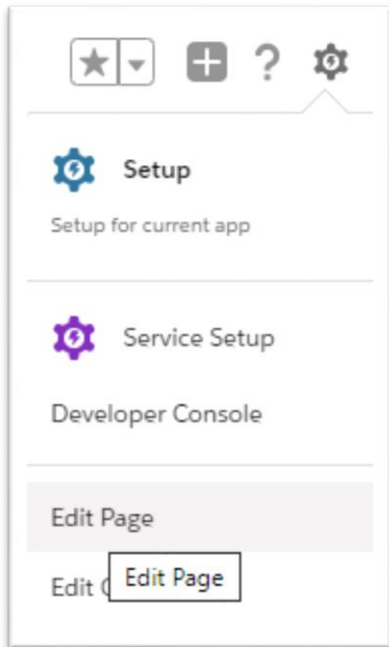
3.2 New strategy

New Strategy

* Name	* API Name
<input type="text" value="EmptyEmailStrategy"/>	<input type="text" value="EmptyEmailStrategy"/>
Description <input type="text"/>	
Object Where Recommendations Display ⓘ <input type="text" value="Contact"/>	



Step 4 add NBA to your contact record page.
4.1 go to a contact record. From settings icon, select edit page.



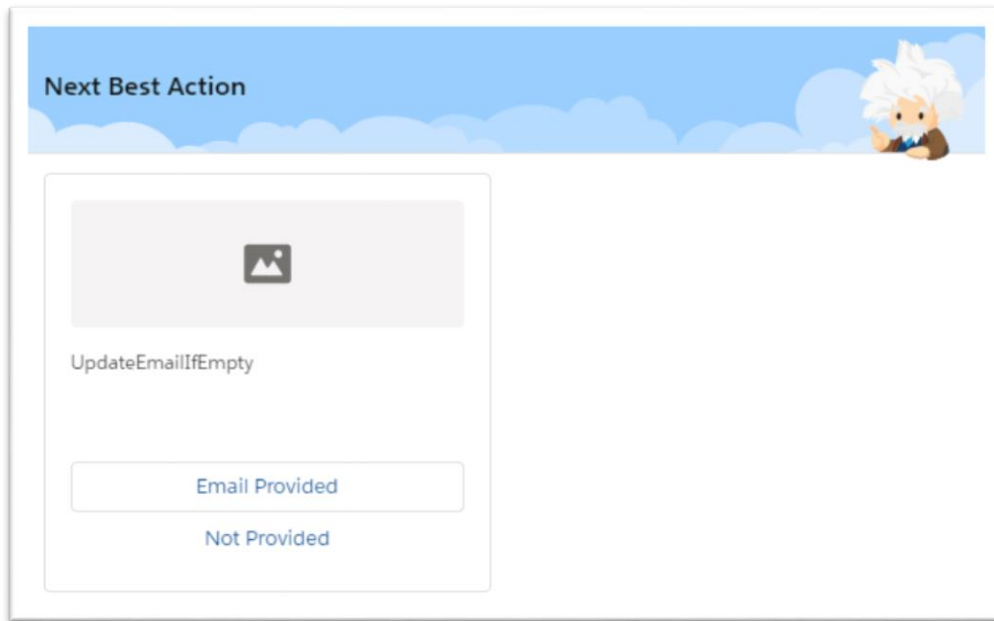
4.2 Drag and drop from left side Next Best action to Right side of page just above activities area.

4.3 Select strategy name from the drop down in right side.

4.4 Select filter in right side to display NBA only when email is empty.

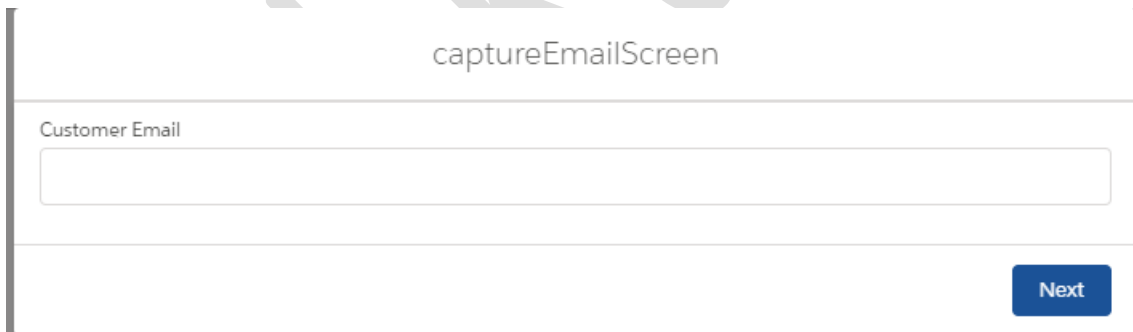
A dialog box for configuring filters. On the left, under '* Filter Type', there are two tabs: 'Record Field' (selected) and 'Advanced'. Below this, under '* Field', is a text input with 'Email' and a close button. Under '* Operator', is a dropdown menu with 'Equal' selected. Under 'Value', is an empty text input. A 'Done' button is at the bottom right. On the right side, there are three checked checkboxes: 'Show Image', 'Show Description', and 'Show Reject Option'. Below these is a section titled 'Set Component Visibilit' with a dropdown arrow. Under this section is a 'Filters' list with one item: '1 New Filter'. At the bottom right of the 'Filters' list is a '+ Add Filter' button.

4.5 Click Save and then click Back button to go back to record page where NBA looks like one below.



The image shows a software interface titled "Next Best Action". It features a blue header with a cartoon character of Albert Einstein. Below the header is a light gray box containing a placeholder image icon, the text "UpdateEmailIfEmpty", and two buttons: "Email Provided" and "Not Provided".

Once you click on email provided button, capture email screen pops up where you can enter email address and save.



The image shows a form titled "captureEmailScreen". It has a label "Customer Email" above a text input field. At the bottom right, there is a blue button labeled "Next".