

Salesforce Einstein Next Best Action (NBA)

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Revision history

| Version | Created by | Reviewed by | Date |
|---------|-------------|-------------|-----------------------------|
| 1.0 | Anil Sharma | Amit Gupta | 26 th Sept. 2019 |
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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 then alerts the user to update the email address into the system.

Create an NBA

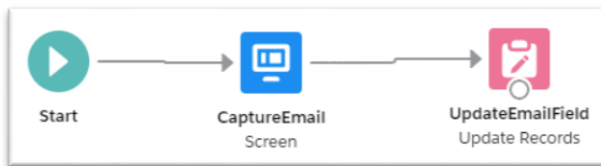
It consists of four steps.

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

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



The screenshot displays the 'Edit Screen' interface for a screen named 'captureEmailScreen'. On the left, a 'Screen Components' panel lists various UI elements available for selection. The main workspace shows a 'Text' component with the label 'Customer Email'. Below the text input, there are 'Pause', 'Previous', and 'Finish' buttons. On the right, a properties panel for the 'Text' component is visible, showing fields for 'Label' (Customer Email), 'API Name' (Customer_Email), and a 'Default Value' search bar. The 'Validate Input' and 'Provide Help' sections are also present in the properties panel.

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

Email

Value

← {!Customer_Email}

+ Add Field

Cancel

Done

1.3 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

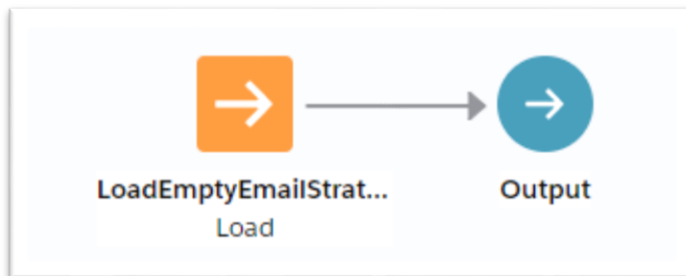
3.2 New Strategy

New Strategy

| | |
|---|---|
| * Name | * API Name |
| <input type="text" value="EmptyEmailStrategy"/> | <input type="text" value="EmptyEmailStrategy"/> |

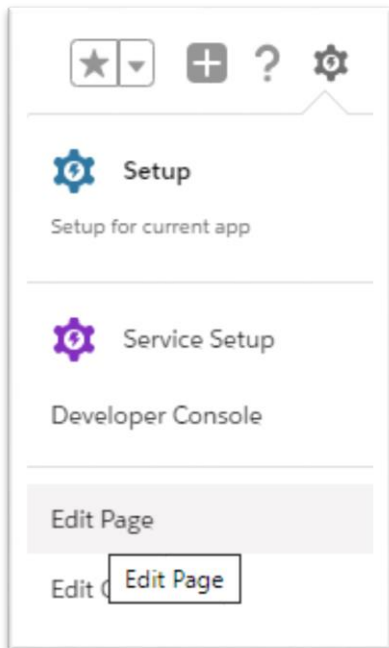
Description

Object Where Recommendations Display ⓘ



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.

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

Test your work

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

Next Best Action


UpdateEmailIfEmpty

captureEmailScreen

Customer Email

Enter email address and click Next. It will automatically update current record's email address.

***** end of the document *****