



# Final Presentation

**Team 1 - Panda Express**

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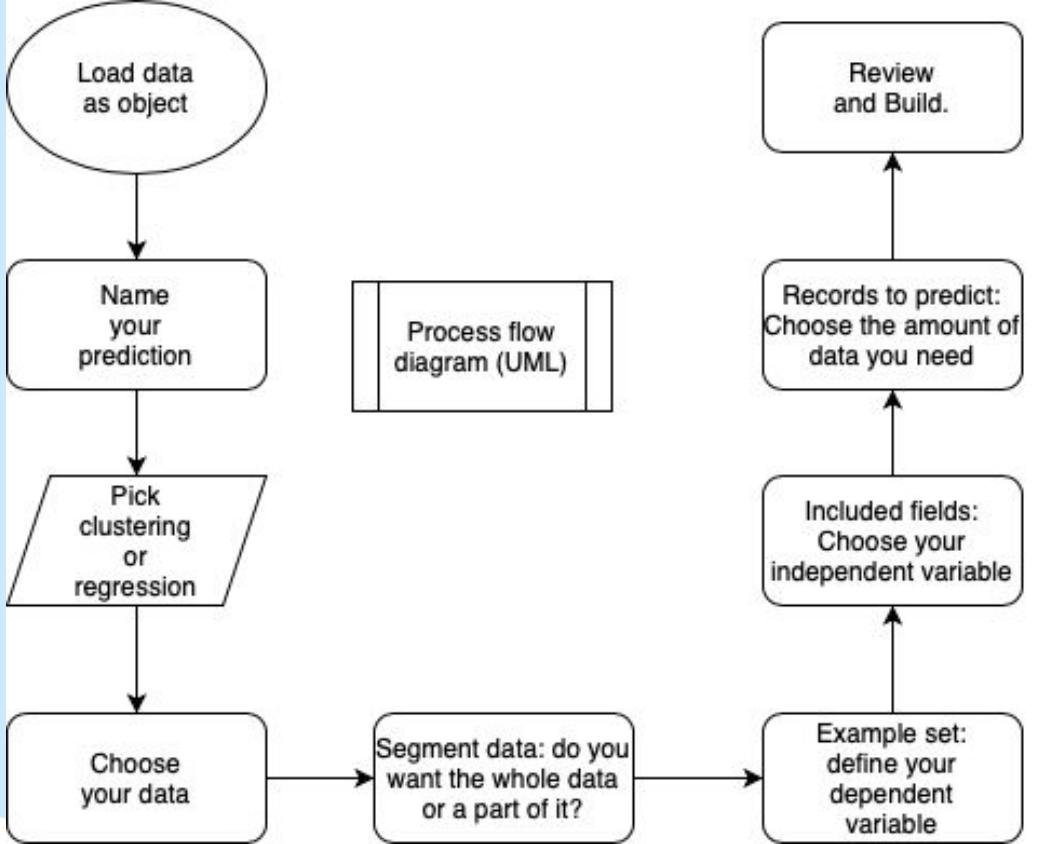


# EPB introduction

- Purpose : To help non technical business owners or other such users make inferences on the data they collect.
- Users : Primary focus group are users without extensive data scientific background.



# EPB introduction(Flow)



# Scoring Methodology

Once evaluated, a score is given measuring the adherence to each heuristic. We use a scale that measures the severity of the issue from low to high.

The severity score is then compared to the difficulty of remediating the

found issue Once evaluated, a score is given measuring the adherence to each heuristic. We use a scale that measures the severity of the issue from low to high. The severity score is then compared to the difficulty of remediating the found issue.

## Frequency (SCALE OF 1-5)

How high is the number of users affected by the problem?

## Difficulty (SCALE OF 1-5)

How hard is it for a user to overcome the problem?

## Workflow Impact (SCALE OF 1-5)

How disruptive is the problem to the workflow?

## Persistence (SCALE OF 1-5)

How often does one user encounter the problem?

## Frustration (SCALE OF 1-5)

How frustrated is the user due to the problem?

## Market Impact (SCALE OF 1-5)

How much is the popularity of the product affected Problem?

## Remediation Effort (SCALE OF 1-5)

How difficult is the problem for developers to fix the problem?

# Score Results



## Low priority usability issues (Scores falling between 6-14)

### User control and freedom

Severity : 6 out of 30

### Help and documentation

Severity : 7 out of 30

### Consistency and standards

Severity: 10 out of 30

### Match between system and the real world

Severity: 5 out of 30



## Moderate priority usability issues (Scores falling between 15-22)

### Error Prevention

Severity : 20 out of 30

### Recognition rather than recall

Severity: 15 out of 30

### Visibility of system status

Severity: 17 out of 30



## High priority usability issues (Scores falling between 22-30)

### Help users recognize, diagnose, and recover from errors

Severity : 27 out of 30  
Difficulty to fix: 4 out of 5

### Flexibility and efficiency of use

Severity: 25 out of 30  
Difficulty to fix: 4 out of 5

### Aesthetic and minimalist design

Severity: 23 out of 30  
Difficulty to fix: 2 out of 5



## Examples of Prediction Building

Help users recognize from errors(Score 27)

The screenshot shows the Einstein Prediction Builder interface. At the top, there's a message: "0 records found" with a red circle around it, followed by the text "You need at least 1 record for your prediction question." Below this, there's a section titled "Include Records That" with a dropdown menu set to "Meet All Conditions". Underneath is a condition builder with fields: "Field" (Time), "Operator" (Greater than or eq...), "Type" (Number), and "Value" (1). A "Add Condition" button is also present. On the left, a sidebar titled "Guided Setup" lists various sections like "Name Prediction", "Configure Data", "Build Prediction", "Input Settings", "Output Settings", and "Review & Build". In the center, a modal window titled "Data Checker" displays a table:

	Records	Required
All child abuse records	9	400
Example Records	9	400
Records to Predict	0	1

Below the table, there are three sections with error messages: "Object", "Example Records", and "Included Fields".

After setting up for the prediction builder, the system shows there's not enough records for it, the system shows the actual limit for it and a few suggestions, but there's not enough reminders or instructions before that.

Remediation Effort: 4



## Examples of Prediction Builder

Aesthetic and minimalist design (Score 23)

The screenshot shows a user interface for 'Prediction Builder'. At the top left is a red circular icon with a black face and hands. Below it is the title 'Examples of Prediction Builder' and a sub-section 'Aesthetic and minimalist design (Score 23)'. A large red box highlights the top-left corner of the interface, which contains a 'Hide Panel' button with a square icon and the text 'Guided Setup' next to a close button 'X'. To the right of this highlighted area, the 'Overview' section is visible, containing 'Name & Type'. Below 'Overview' is the 'Configure Data' section, which includes 'Object' and 'Segment'. At the bottom is the 'Build Prediction' section, with a collapsed 'Inputs Setting' menu indicated by a downward arrow.

*Location:*

*Above the Hamburger Menu*

- The "Hide Panel" button is not as recognizable as the icon that's commonly used - , might cause confusion on what will happen upon clicking this button.
- The "X" button's functionality is overlapping with the "Hide Panel" button – Both of these two buttons are for collapsing the menu. The need of having two buttons for the same actions needs to be re-evaluated.

# Competitive Analysis

Features	Einstein Prediction Builder	H2O AI Cloud	Obviously.ai	Neptune AI
Walkthrough/ Instruction	✖	✓	✓	✓
Different UseCases Demo Application	✖	✓	✓	✖
Visualization of predicted results	✓	✓	✓	✓
Integration of different platforms	✖	✖	✓	✓
No-Code	✓	✓	✓	✖
Collaboration	✖	✖	✓	✓

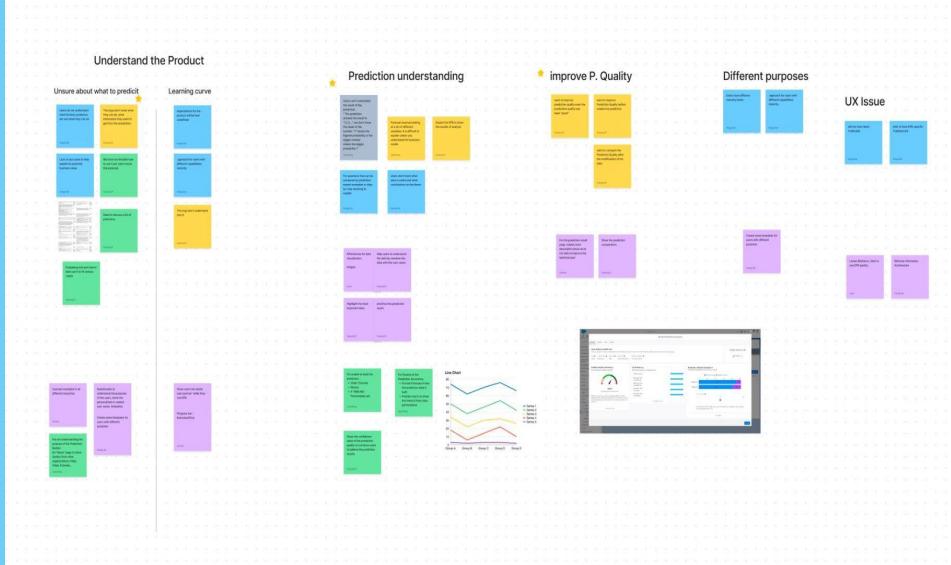
## Interfaces

Clear and organized interfaces enable users to get their job done efficiently.

## Team Collaboration

Team collaboration is a feature worthy of being considered.

# Insights from the Salesforce document



- Users don't know what they can do with EPB
- Users are not familiar with the prediction process
- Users face difficulty understanding the prediction result and its use cases
- Users want to further improve their prediction quality

# Pain points and Ideation

## Navigation Bar

The navigation bar hierarchy is not clear, and the user is not very clear about the whole process.

## Prediction Object Selection

When users select the object they want to predict, they could only do so from memory or intuition because they could not view the source data.

## Error Messaging

The error messages is not efficient at all. The users may easily miss them.

## Branch Selector

1. Introduction of Example Records taking too much space
2. Diagrams for the spreadsheet is not clear enough

Change the hierarchy of the navigation bar.

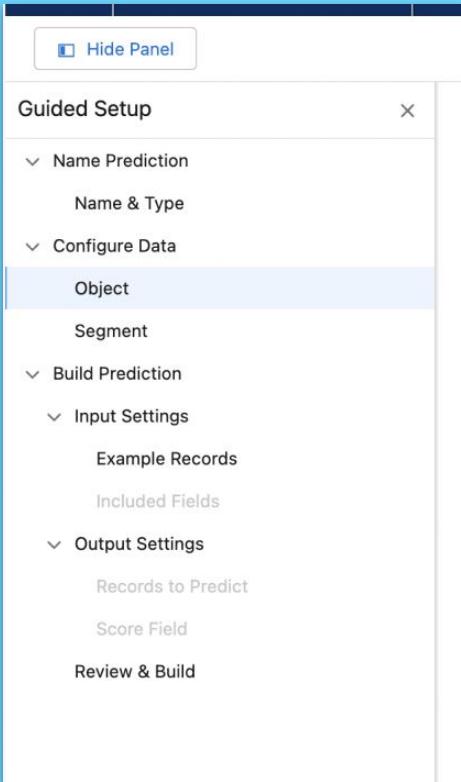
Provide source data to users for them to find data.

1. Add a modal window & icon to indicate the error
2. Change the final display of the error messages.

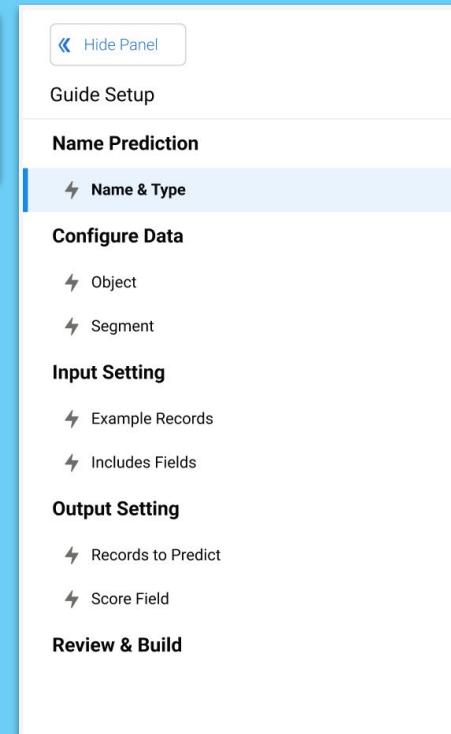
1. Hide the introduction in a hover button.
2. Changed the visual representation of different fields to match the form of the diagrams.

# 1. Navigation Bar

## Before



## After



Expand and collapse of navigation, using an icon with an arrow instead of the previous cross to make it more clear to users.

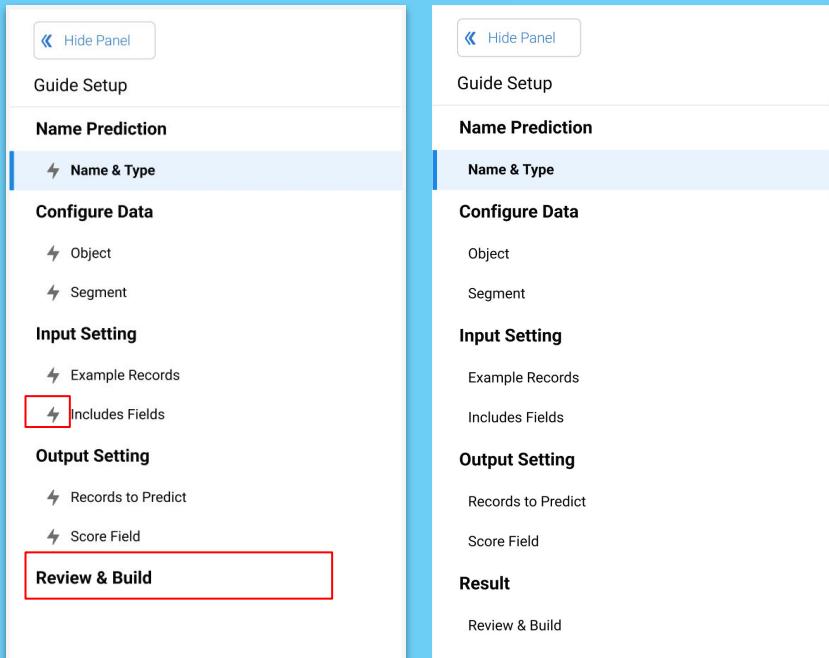
Using the existing Salesforce Lightning System and optimized the font to make the navigation bar hierarchy more clear.

# Test & Feedback & iteration

## Major Feedbacks

- The clickable pages are all submenus, however there is no submenu under the last heading.
- The lightning icon seems unnecessary as it doesn't make sense.

We changed the last page to a submenu to match all menu pages.



The lightning icon was from Salesforce's lightning design system and because it was confusing to users, we removed it.

## 2. Error Messaging

### Before

Choosing the object for your prediction  
Your object must contain the:

- Historical data you want Einstein to learn from
- Records to predict
- Field you want to predict values for

Note that Einstein only considers data from the last two years.

Which object contains the field that you want to predict values for?  
Let's say you're predicting if your opportunities will close. In this case, you would choose the **Opportunity** object.

Account  
**13 records found**  
You need at least 400 Account records to build.  
Wait until you have enough records or choose a different object.

In the original version, when there's not enough results found or any other types of error occur, there's only a line of text to indicate the user about this error. Also, there's not much notification after the user move to the next step.

Since this error will disable the whole prediction, We think it should belong to urgent notification. Thus, following Salesforce design system, we create a modal window for indicating the error and an error icon at the left to keep reminding the user when they moves to next steps.

### After

Choosing the object for your prediction  
Your object must contain the:

- Historical data you want Einstein to learn from
- Records to predict
- Field you want to predict values for

Note that Einstein only considers data from the last two years.

Which object contains the field that you want to predict values for?  
Let's say you're predicting if your opportunities will close. In this case, you would choose the **Opportunity** object.

Account  
**13 records found**  
You need at least 400 Account records to build. Wait until you have enough records or choose a different object.

**There're not enough records in the current object**

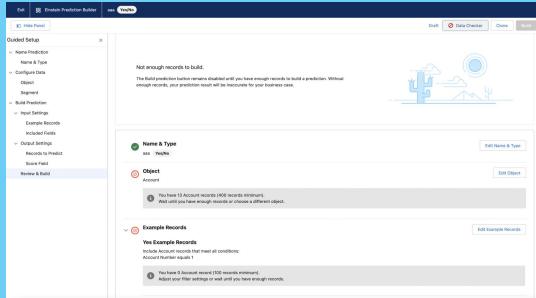
You need at least 400 Account records to build, now there're only 13 records found.  
You won't be able to build prediction with not enough records. Please edit your current object, or choose a different object or wait until you have enough data.

Ignore Edit

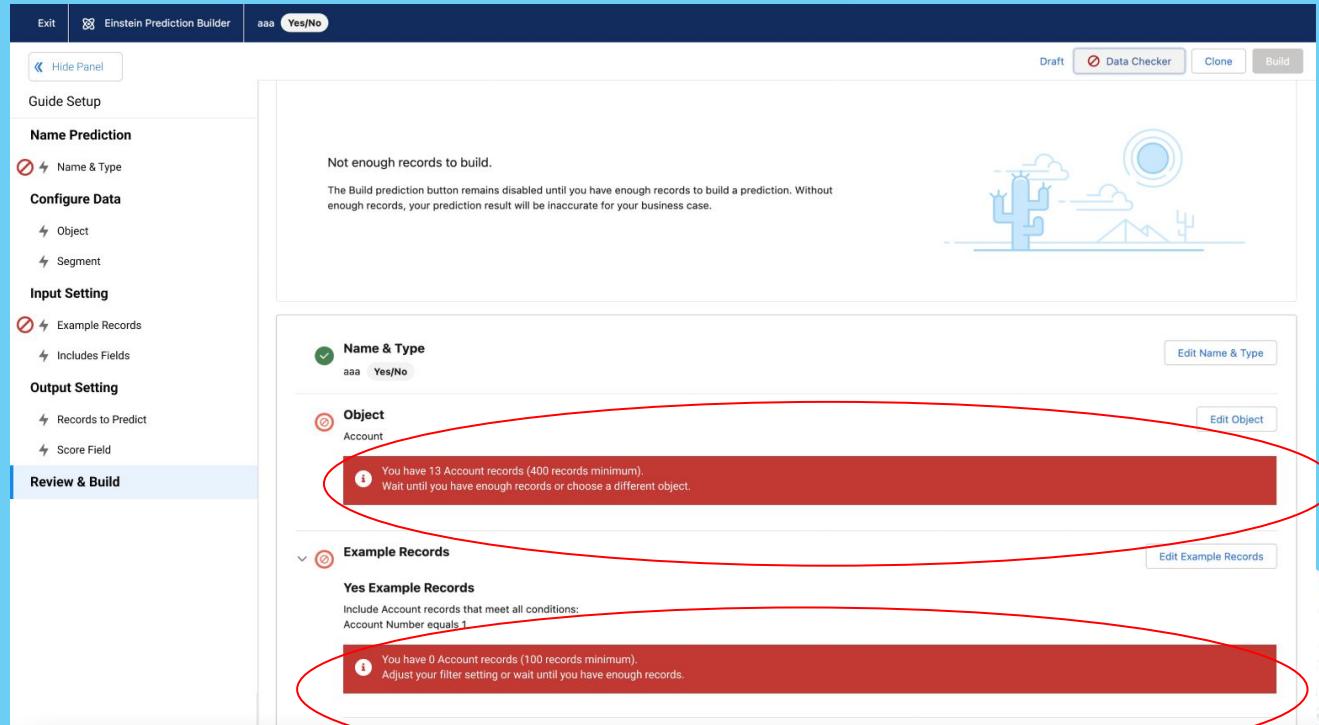
Next

## 2. Error Messaging

### Before



### After

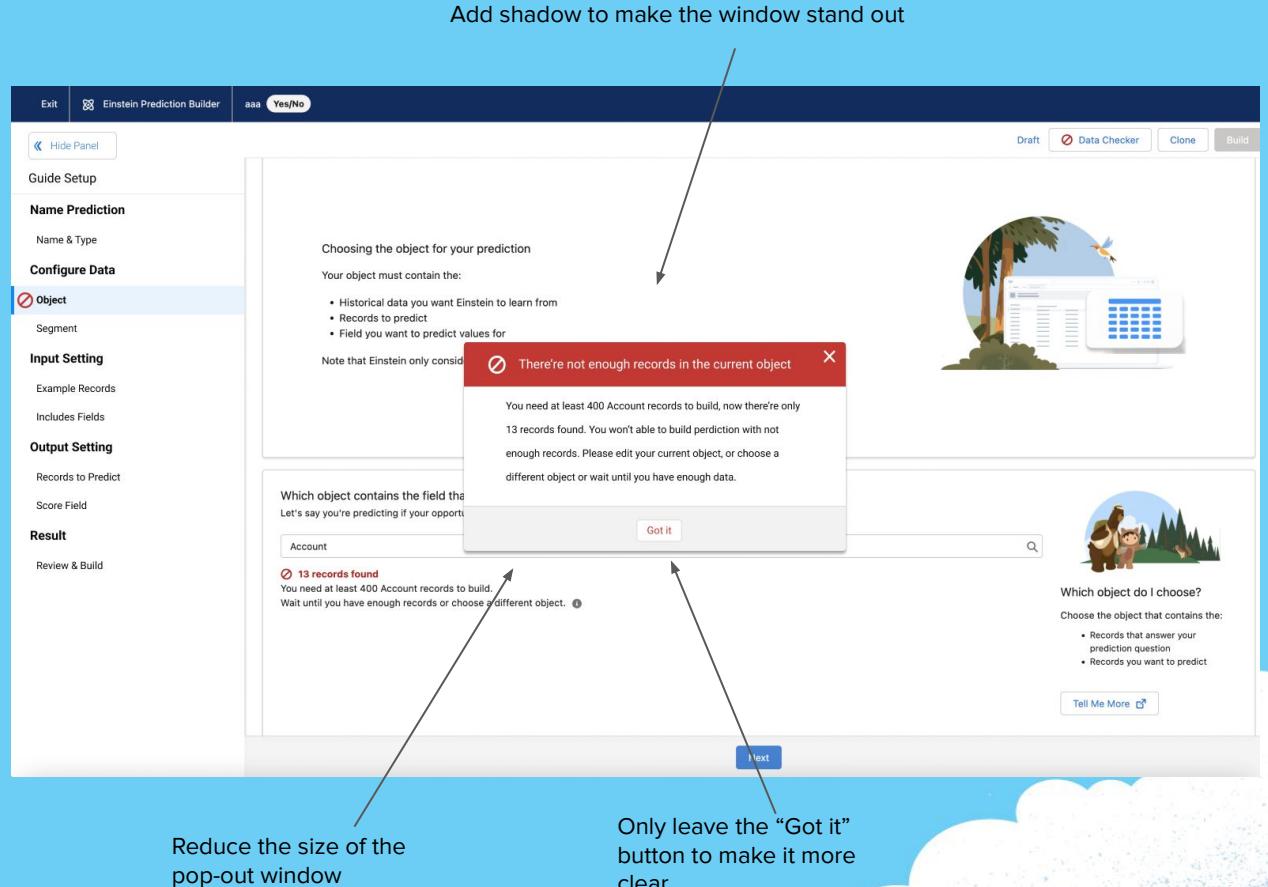


We also made some slight changes on coloring to indicate the errors at the final prediction page to make it easier to follow.

# Test & Feedback & iteration

## Major Feedbacks

- The error messages can be annoying sometimes.
- The Pop out window need to stand out more.
- Some logic and flow are not clear enough

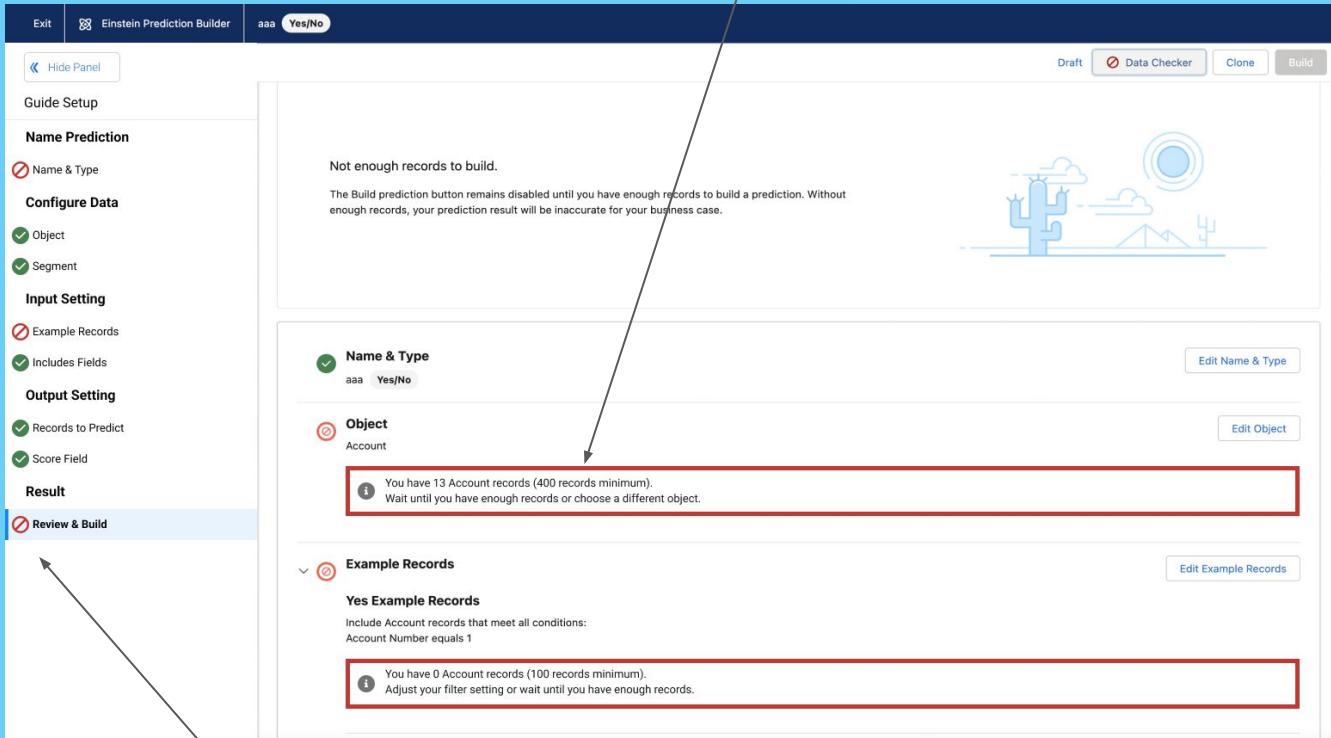


# Test & Feedback & iteration

## Major Feedbacks

- The error messages can be annoying sometimes.
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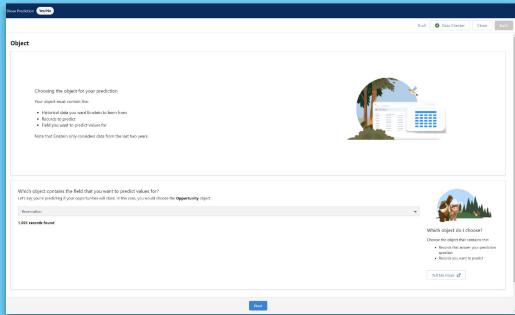
Only leave the frame red to make it less annoying or less eye-catching



Except for the error icon, also add the pass icon to make the logic more clear

### 3. Resource Data

#### Before



#### After

A screenshot of the redesigned Einstein Prediction Builder interface. It shows a sidebar with 'Object' selected. The main area has a heading 'Choosing the object for your prediction' and a list of items: 'Historical data you want Einstein to learn from', 'Records to predict', and 'Field you want to predict values for'. Below this is a note: 'Note that Einstein only considers data from the last two years.' At the bottom, it says 'Which object contains the field that you want to predict values for?' with a dropdown menu set to 'Reservation'. A note below says 'Let's say you're predicting if your opportunities will close. In this case, you would choose the Opportunity object.' At the very bottom, it says '1,001 records found'. To the right of the main area, there is a 'Data' section titled 'Reservation' containing a table of data. The table has columns: Customer\_Name, Date, Time, People\_Number, Status, and Late. The data shows various entries for different customers over time, with some records marked as 'Show' or 'No\_show' and others as 'late' or 'on\_time'. A large blue 'Next' button is at the bottom right.

In the original page, when users select the object they want to predict, they could only do so from memory or intuition because they could not view the source data on the same page.

In the redesigned page, users can view the source data to confirm after selecting the predicted object.

# Test & Feedback & iteration

Emphasize the action the user needs to take

## Major Feedbacks

- The action space should be emphasized and can be put on top of the data together.
- 10 or 20 lines of data is enough. Now she feels it too big and waste of place

The screenshot shows the Einstein Prediction Builder interface. On the left, a sidebar lists steps: Hide Panel, Guide Setup, Name Prediction (selected), Configure Data, Object, Segment, Input Setting, Example Records, Includes Fields, Output Setting, Records to Predict, Score Field, Result, and Review & Build. The main area has two tabs: 'Object' (selected) and 'Choose Object'. The 'Object' tab features a nature-themed illustration of a tree, a bird, and a computer monitor displaying charts. Below it is a section titled 'Choosing the object for your prediction' with instructions: 'Your object must contain the:' followed by three bullet points: 'Historical data you want Einstein to learn from', 'Records to predict', and 'Field you want to predict values for'. A note at the bottom states: 'Note that Einstein only considers data from the last two years.' The 'Choose Object' tab contains a question 'Which object contains the field that you want to predict values for?' and a dropdown menu set to 'Reservation'. It also shows '1,001 records found'. Below these tabs is a section titled 'Data (25 samples)' containing a table of 25 reservation records. The table has columns: Customer\_Name, Date, Time, People\_Number, Status, and Late. The data shows various names like Adam, Barry, Charlie, etc., with dates ranging from 10/8/2022 to 10/9/2022 and times from 1:55pm to 9:30pm. The 'Late' column indicates whether the show was late or on time. A large blue 'Next' button is at the bottom of the screen.

Customer_Name	Date	Time	People_Number	Status	Late
Adam	10/8/2022	1:55pm	1	No_show	on_time
Barry	10/8/2022	1:55pm	2	No_show	on_time
Charlie	10/8/2022	1:55pm	3	No_show	on_time
Erik	10/8/2022	1:55pm	3	No_show	on_time
Henry	10/8/2022	5:50pm	5	Show	late
Henry	10/8/2022	5:50pm	2	Not_show	late
Henry	10/8/2022	5:50pm	3	Show	late
Henry	10/9/2022	5:50pm	2	Show	on_time
Henry	10/9/2022	5:50pm	5	Show	on_time
Adam	10/9/2022	5:50pm	6	Show	late
Henry	10/9/2022	9:30pm	4	Show	on_time
Charlie	10/9/2022	9:30pm	2	Show	on_time
Adam	10/9/2022	9:30pm	3	Show	on_time
Adam	10/9/2022	9:30pm	4	Show	late
Charlie	10/9/2022	9:30pm	5	Show	late

Display 25 samples of data to help users recall data content

# 4. Example Records

Before

The screenshot shows the Einstein Prediction Builder interface. The top navigation bar includes 'Exit', 'Einstein Prediction Builder', '111 Numeric', and status indicators for 'Draft', 'Data Checker', 'Clone', and 'Build'. A sidebar on the left titled 'Guided Setup' contains sections: 'Name Prediction', 'Configure Data' (with 'Object' and 'Segment' sub-options), 'Build Prediction' (with 'Input Settings' containing 'Example Records' which is selected), 'Output Settings' (with 'Records to Predict' and 'Score Field'), and 'Review & Build'. The main content area is titled 'Example Records' and displays two steps:

- Define your example set**: A text box explains that an example set is a set of records in the dataset that the machine learning model learns from. It includes a callout with an illustration of a globe, a tree, and a bird, and a quote: "By providing records that are examples of prediction outcomes, you teach Einstein what to base your prediction on. The closer your example records are to the outcome you want to predict, the more accurate the model will be."
- Which field determines the outcome that you're predicting?**: This step shows a grid icon with one cell highlighted blue, labeled 'Selected Field'. To the right is an illustration of a character sitting on a rock. Below the grid is a search bar with 'Time' and a magnifying glass icon.

A red box highlights the 'Example Records' section in the sidebar and the first step in the main content area.

- Introduction of Example Records taking too much space

# 4. Example Records

After

The screenshot shows the Einstein Prediction Builder interface with the title '4. Example Records'. The left sidebar has a 'Name & Type' section selected. The main area displays the 'Example Records' step, which includes a grid of colored squares representing example records, a search bar, and descriptive text about selecting fields. Below this, another section asks about considering all records, with options for 'Selected Field', 'Field With Value', or 'Empty Field', and a 'Save & Next' button at the bottom.

- Hide the introduction in a button, showing the information when users hover over it, saving space and allowing users to jump directly to setting up the Example Records.

# Testing & Getting Feedback

This new one saved a lot of space! And it's quite clear where to click for more information.

But I'm still not understanding what "Example Records" is after seeing this though.

I think the text is not informative enough. You used a lot of space but I'm not getting much.

## ***Design Recommendations***

- Add a “Learn more” button along with the text, allowing users to get more information or maybe even a demo to see how Example Records works.

# Iteration

## Iteration

Screenshot of the Einstein Prediction Builder interface showing the "Name & Type" configuration step.

The main panel displays the "Example Records" section with the following content:

- Which field determines the outcome?** A question mark icon is shown above a grid of colored squares. One square in the top row is highlighted blue and labeled "Selected Field".
- Text:** "Your example set (training set) is a set of records in your dataset that the machine learning model learns from." "By providing records that are examples of prediction outcomes, you teach Einstein what to base your prediction on. The closer your example records are to the outcome you want to predict, the more accurate the model will be."
- Link:** "Not sure how it works? Watch a demo!"
- Search bar:** "Select a field..." with a magnifying glass icon.
- Image:** A cartoon character sitting on a rock with a blue sun in the background.
- Text:** "Which field do I choose?" "Choose the field that contains the value you're predicting. If you're predicting how much a deal is worth, that value might be stored in the Amount field. Einstein learns from past deals that have closed in order to predict how much future deals will be worth."
- Link:** "Tell Me More" with a blue arrow icon.

Below this section, another part of the interface shows:

- Text:** "Which example records do you want Einstein to consider? [Check the Excel Form >](#)"
- Grid:** A grid of colored squares where some are filled and some are empty. One square is highlighted blue and labeled "Selected Field". Other options include "Field With Value" and "Empty Field".
- Text:** "Example Records"
- Image:** A cartoon character sitting on a rock with a yellow sun in the background.
- Text:** "Why use all records?" "Think about the records that already have an answer to your prediction question. Are they similar to the records you want to make predictions for? If so, select all records."

At the bottom of the screen, there are three buttons: "Cancel", "Save", and "Save & Next".

- Added a “Watch Demo” button in the information box, allowing users to watch video tutorials if they still feel confused after reading the text.

# 4. Example Records

Before

The screenshot shows the Einstein Prediction Builder interface. On the left, a sidebar titled 'Guided Setup' lists various sections: Name Prediction, Name & Type, Configure Data (Object, Segment), Build Prediction, Input Settings (Example Records selected), Output Settings (Records to Predict, Score Field), and Review & Build. The main area displays a grid of colored squares representing example records. A red box highlights the 'Example Records' section. Below the grid, there are three radio button options: 'Example Records' (selected), 'Selected Field', 'Field With Value', and 'Empty Field'. At the bottom, two radio button options are shown: 'Use all records that have a value for the selected field' (selected) and 'Use specific records that have a value for the selected field'. To the right, a sidebar shows a progress bar at 'oct31 Numeric' and buttons for Draft, Data Checker, Clone, and Build. It also contains a note about predicting future deal worthiness and a 'Tell Me More' link. A cartoon bear illustration is present.

- Diagrams for the spreadsheet is not clear enough

# 4. Example Records

After

The screenshot shows the Einstein Prediction Builder interface with the title "Example Records" at the top. On the left, a sidebar lists categories: "Name Prediction" (selected), "Name & Type", "Configure Data" (with "Object" and "Segment" options), "Input Setting" (with "Example Records" and "Includes Fields" options), "Output Setting" (with "Records to Predict" and "Score Field" options), and "Result" (with "Review & Build" option). The main content area has two sections. The first section, "Which field determines the outcome that you're predicting?", features a grid icon, a "Check the Excel Form" link, and a "Selected Field" button. The second section, "Which field do I choose?", includes a search bar, a "Select a field..." placeholder, and a "Tell Me More" link. The second section also contains a cartoon character of a small brown bear standing in a forest. The bottom section, "Which example records do you want Einstein to consider?", shows a grid icon, a "Check the Excel Form" link, and three buttons: "Selected Field" (highlighted in blue), "Field With Value", and "Empty Field". A "Example Records" button is at the bottom. The bottom right section, "Why use all records?", features a cartoon character of a small brown bear standing in a field with a large sun. It includes a "Cancel", "Save", and "Save & Next" button at the bottom.

- Changed the visual representation of different fields to match the form of the diagrams

# Testing & Getting Feedback

This new design makes more sense and explain the terms better, great work!

Well, are these buttons?  
Can I click on them?

This whole diagram is still not clear for me, are you trying to tell me that empty field won't be included as "Example Records" or...?

## ***Design Recommendations***

- Change the design of the diagram, make it clearer on the information provided.

# Iteration

## Iteration

Screenshot of the Einstein Prediction Builder interface showing the "Example Records" step.

The left sidebar shows the navigation path: Exit, Einstein Prediction Builder, 111 Numeric, Hide Panel, Guide Setup, Name Prediction, **Name & Type**, Configure Data, Object, Segment, Input Setting, Example Records, Includes Fields, Output Setting, Records to Predict, Score Field, Result, Review & Build.

The main area displays two sections:

- Example Records ?**

Which field determines the outcome that you're predicting?



Selected Field

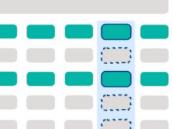
[Check the Excel Form >](#)

Select a field...



Which field do I choose?

Choose the field that contains the value you're predicting. If you're predicting how much a deal is worth, that value might be stored in the Amount field. Einstein learns from past deals that have closed in order to predict how much future deals will be worth.

[Tell Me More](#)
- Which example records do you want Einstein to consider? [Check the Excel Form >](#)**
  - Selected Field
  - Field With Value
  - Empty Field
  - Example Records

Why use all records?

Think about the records that already have an answer to your prediction question. Are they similar to the records you want to make predictions for? If so, select all records.

- Changed the shapes used for explaining the diagram to match the diagram itself, make it clearer on what the diagram is trying to explain



thank  
you



BLAZE  
YOUR  
TRAIL



salesforce