Einstein Discovery Innovation Day Hands On Activity

This document is the step-by-step guide to the hands on exercises for Tableau CRM & Einstein Discovery Innovation Day.

- **You should have received an email with your username for your trial org for today's activity. The username will be <your email><random number>.trial**

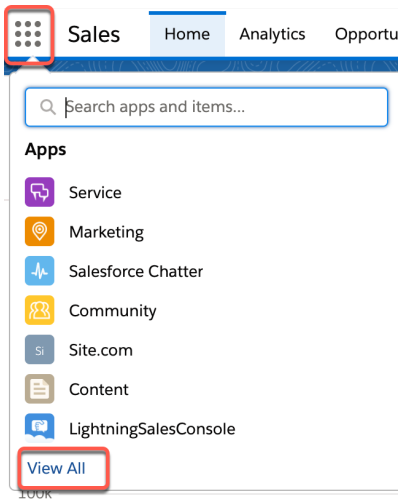
NOTE: If you haven't already registered, please go to https://pbo-lab-developer-edition.na156.force.com/signup/s/ and fill out the form. You will receive an email with credentials to a trial org.

Use Case Description:

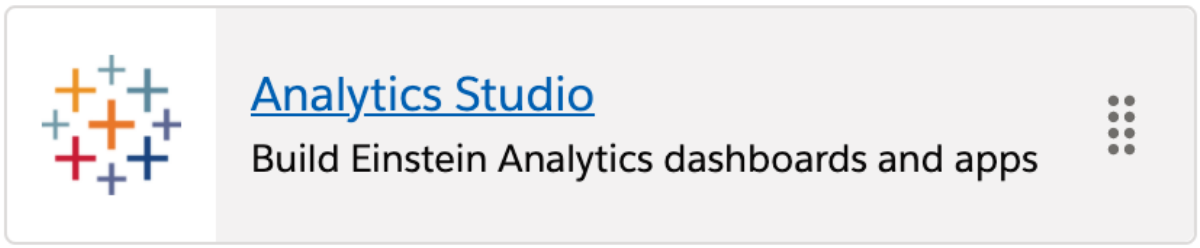
We will build a Discovery story using the dataset **HR-Employee-Attrition.** We will proceed to deploy the model and operationalize it in a business process.

Exercise 0: Delete the prebuilt Model

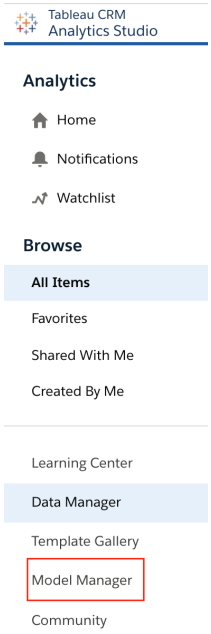
1. From Salesforce, Open App Launcher by clicking on the **App grid**. Then click **View All**.



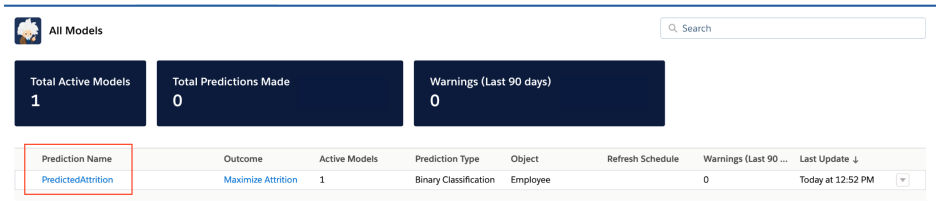
2. Click **Analytics Studio.**



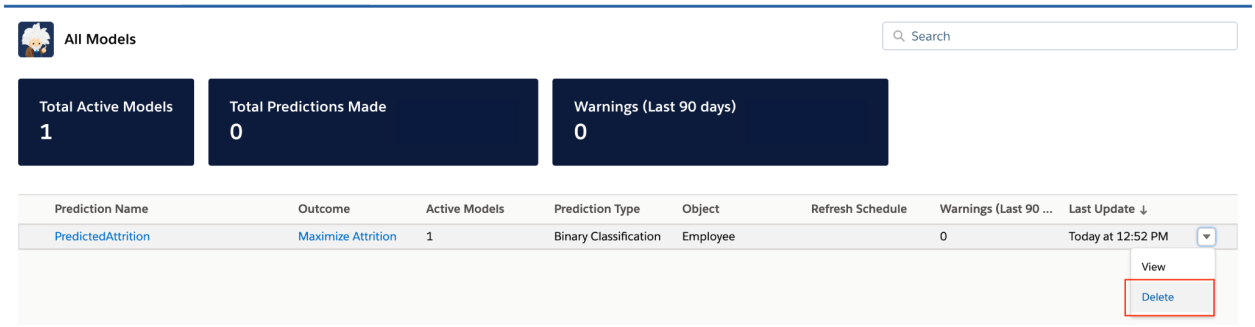
3. Click on **Model Manager**



4. Find the model "**PredictedAttrition**"

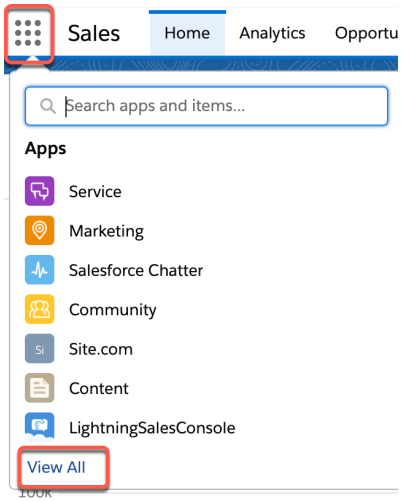


5. **Delete** the model

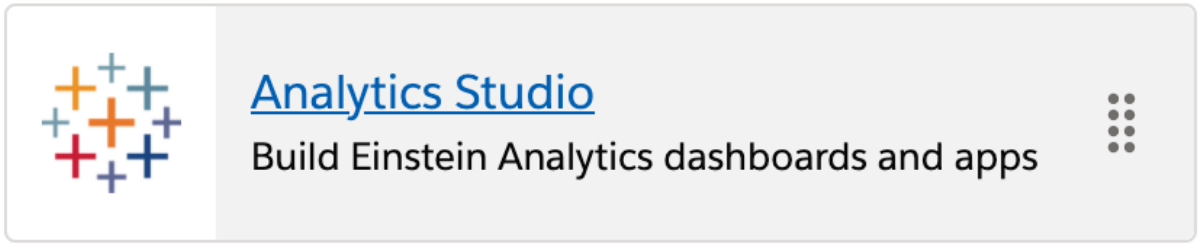


Exercise 1: Create Discovery Story

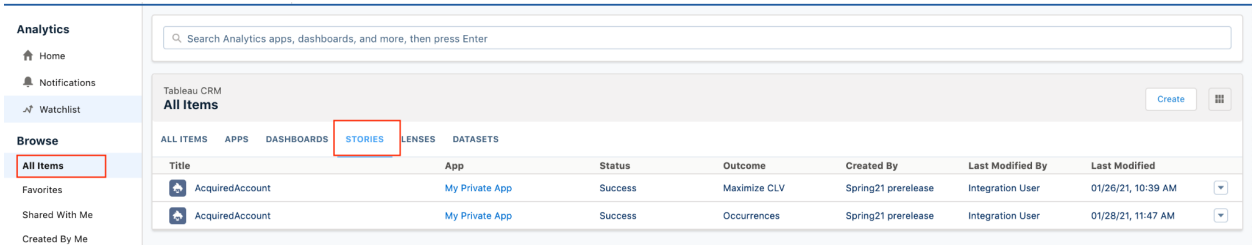
1. From Salesforce, Open App Launcher by clicking on the **App grid**. Then click **View All**.



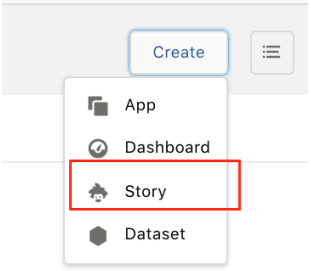
2. Click **Analytics Studio.**



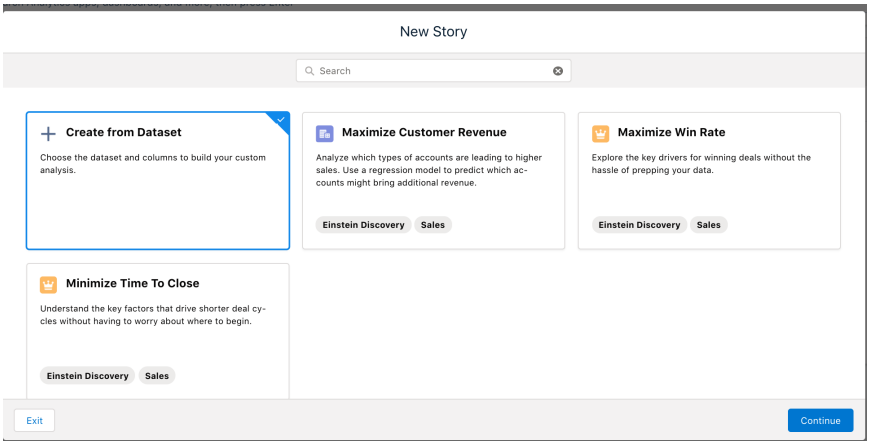
3. On the Analytics home screen, scroll down, click **All Items.** Observe Stories on the menu bar.



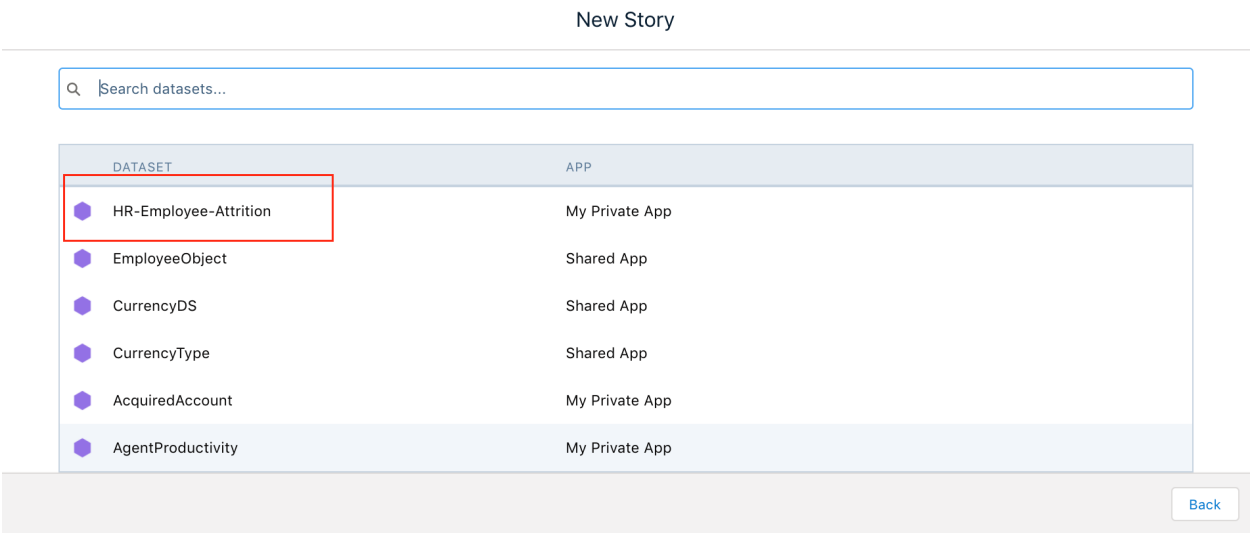
4. Click on Create on the right side and select **Story**.



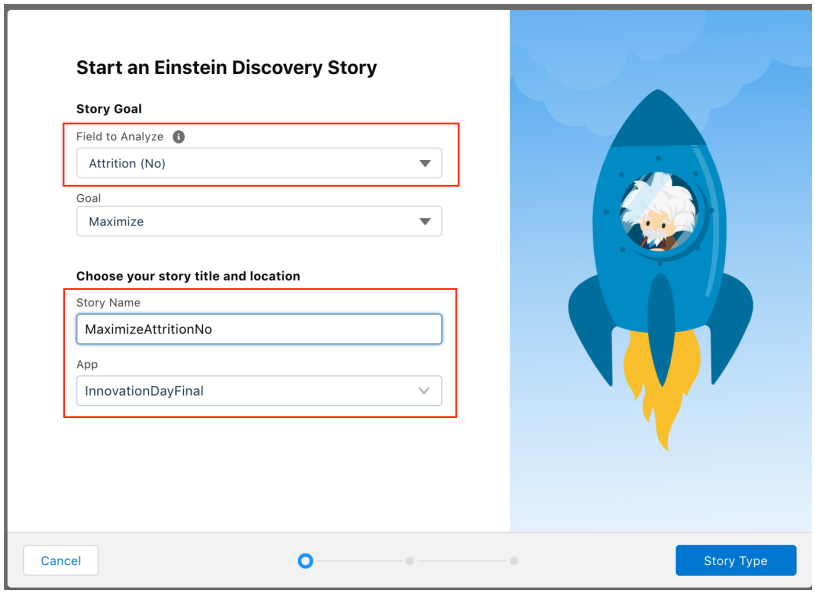
5. Select **Create from Dataset** and click **Continue**



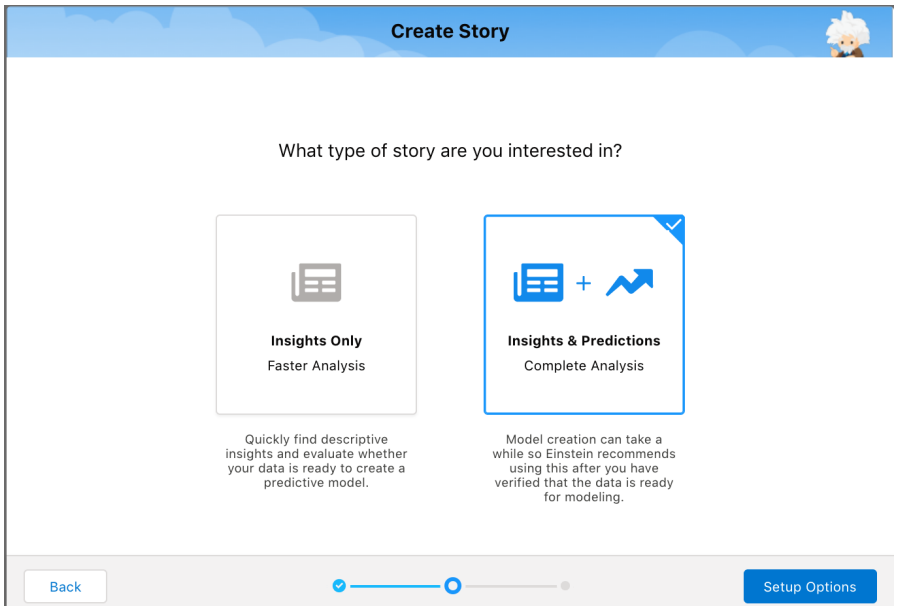
6. Select **HR-Employee-Attrition** Dataset



7. Select **Attrition (No)** in **Story Goal** and **Maximize** under **Goal.** Type **Story Name** as **MaximizeAttritionNoPractice** and select the App **InnovationDayPractice.**



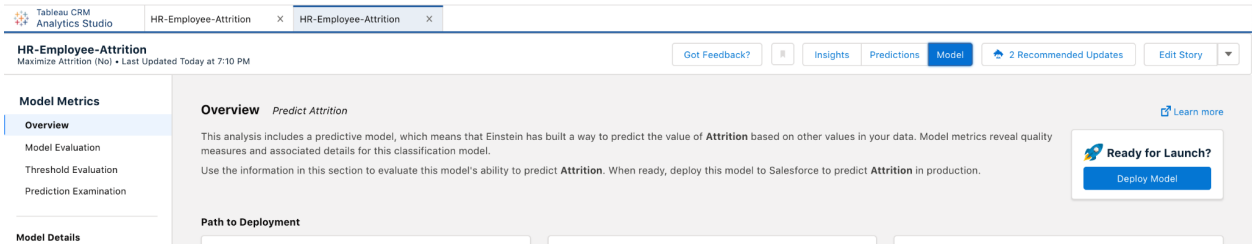
8. Click on **Story Type**
9. Select **Insights and Predictions**



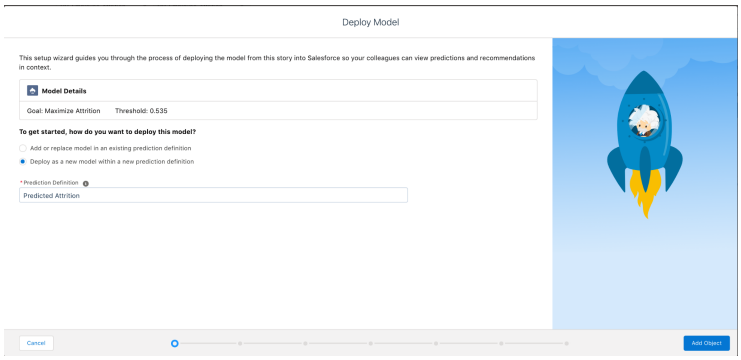
10. Click **Setup Options**.
11. Select **Automated**.
12. Click on **Create Story**.
13. Wait for the process to finish.

Exercise 2: Deploy a Model

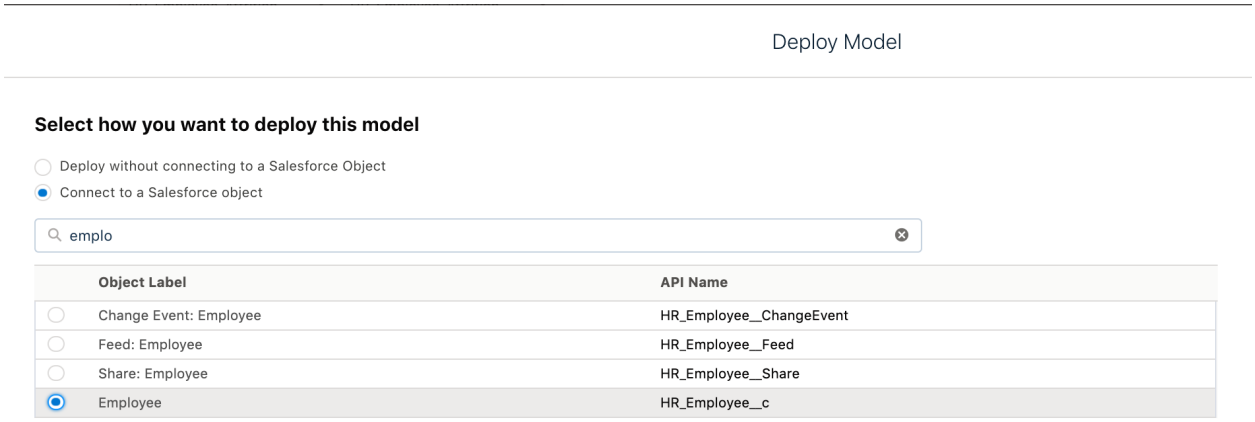
1. Open the **Story**
2. Click on the **Model** button on the menu bar



3. Click on **Deploy Model**.
4. Select **Deploy as a new model within a new prediction definition.**

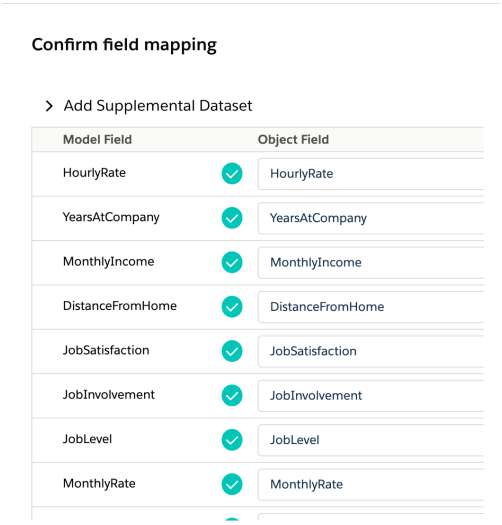


5. Enter **Predicted Attrition** for Prediction Title.
6. Click on **Add Object.**
7. On the Select how you want to deploy model screen, select **Connect to a Salesforce Object** in the choice box. Then select **Employee** object as the object you want to deploy to.

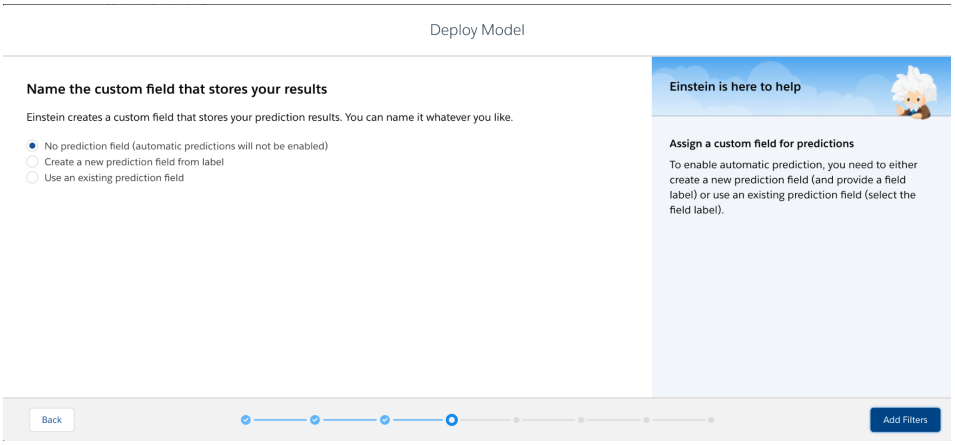


8. Click the **Map Fields** button.

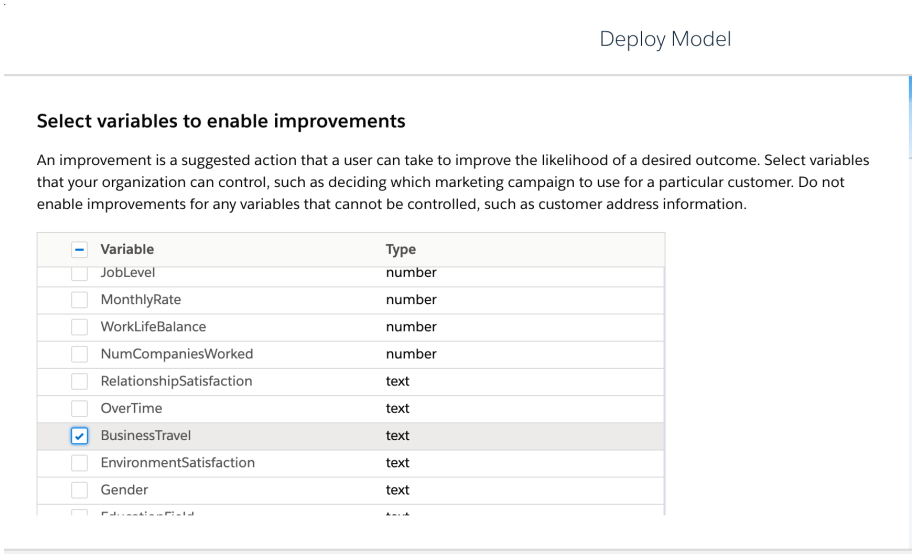
9. Confirm Field Mapping. They should all be mapped. Age may not be mapped at which time you'll have to add it.



10. Click on the **Confirm Prediction Field** button.
11. Select **No prediction field (automatic predictions will not be enabled)**.



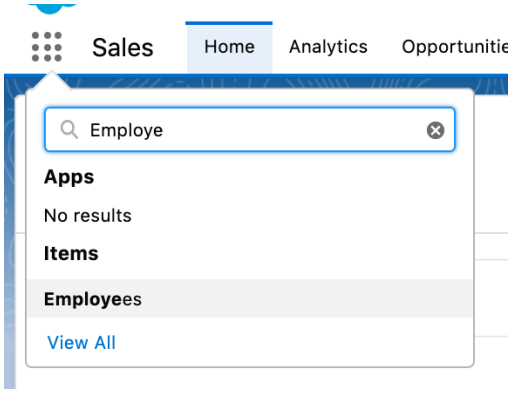
12. Click the **Add Filters** button.
13. Select **No segment (use the prediction on all the data).**
14. Click the **Add Variables** button.
15. Select **BusinessTravel** on the Select variables to enable improvements window.



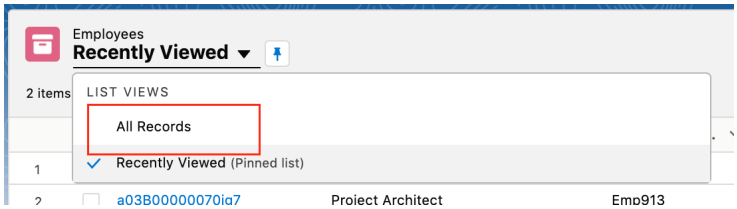
16. Click **Review.**
17. Click **Deploy.**
18. Click **Done** after the model is deployed successfully.

Exercise 3: Display the Prediction on the Employee Record Page

1. Click on the app launcher icon and select **Sales** app.
2. You will be taken to the Sales app.
3. Select again and Search for Employees.

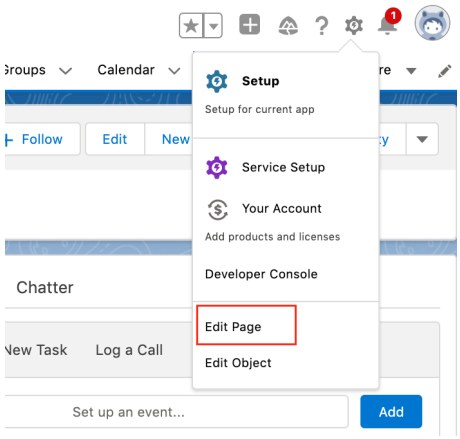


4. Select **All Records** from the list view drop down.

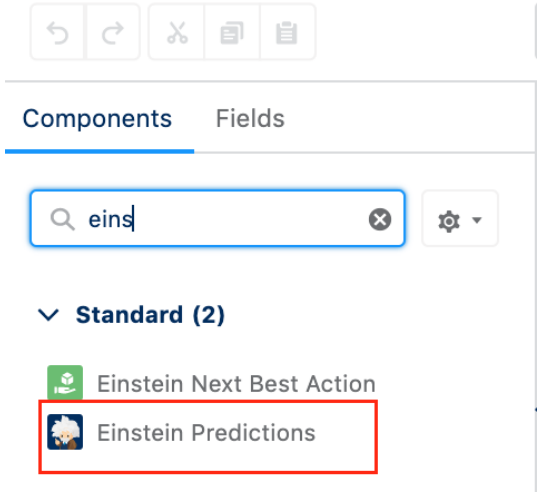


5. Click on any employee record to open the record.

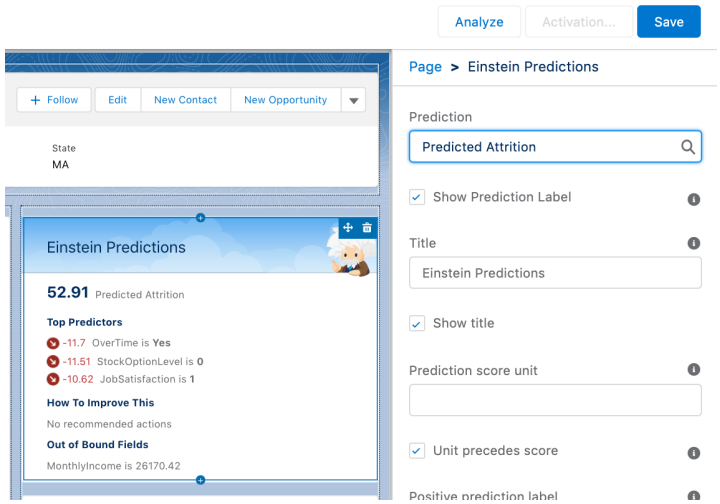
6. Click on the gear icon and select the **Edit Page** option.



7. In the component selector, search for Einstein Prediction in the Components search box.

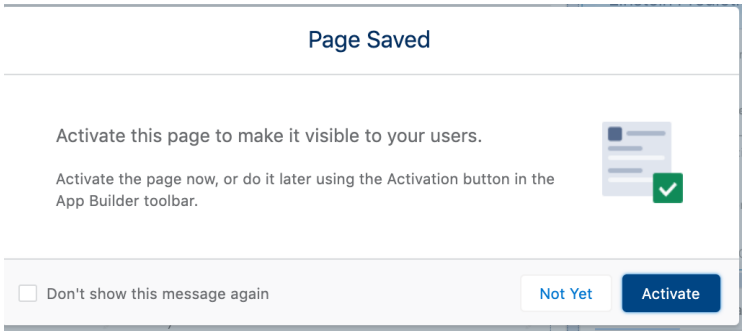


8. Drag the component on the page and drop on the side.
9. Select **Predicted Attrition** under Prediction.

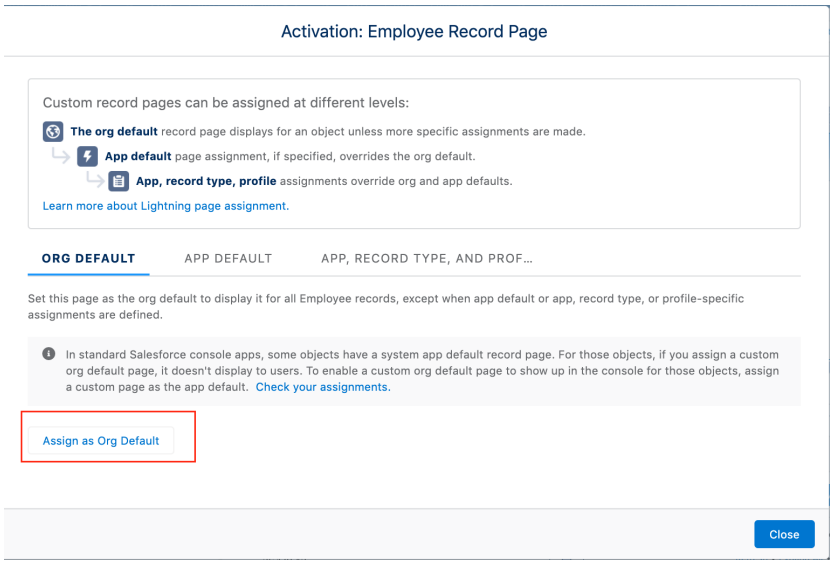


10. Click **Save**.

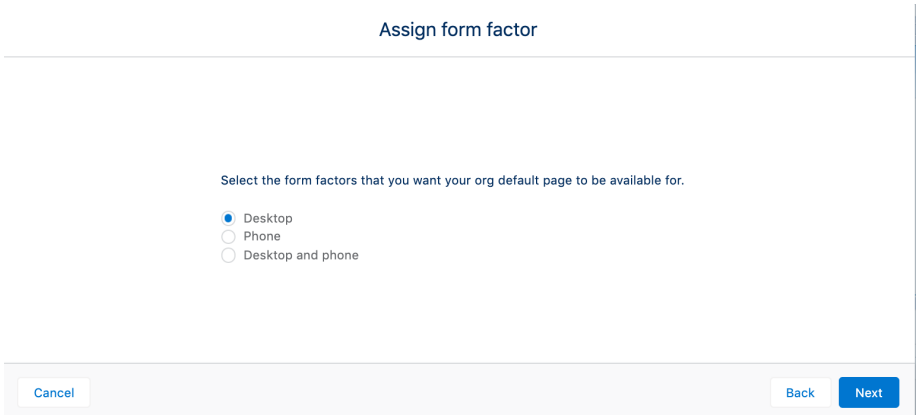
11. Click **Activate**. If the page has already been activated, you don't need to do this steps 11-16.



12. Click on **Assign as Org Default**.



13. Click **Save**.
14. Keep **Desktop** as the selected for factor.



15. Click **Next**.
16. Click **Save**.
17. Click the back button from the designer.

Lightning App Builder