

UNHCR
Einstein Implementation Walkthrough



Requirement overview

Steps		
Export Entities from Salesforce	Contact (Main Entiity)	
		Opty
		Donations
		Cases
Filter Contacts based on different campaign critera		30 scenarios (each has 8-15 criteria)
Download in Excel.		Using Share option

Entity Objects data storage

Storage Usage

[Help for this Page](#) ?

Your organization's storage usage is listed below.

Storage Type	Limit	Used	Percent Used
Data Storage	143.5 GB	99.4 GB	69%
File Storage	72.9 GB	6.0 MB	0%
Big Object Storage	1,000,000	0	0%

Current Data Storage Usage

Record Type	Record Count	Storage	Percent
Opportunities	8,863,966	16.9 GB	17%
Installments	8,863,916	16.9 GB	17%
Payments	8,783,094	16.8 GB	17%
Campaign Members	14,393,551	13.7 GB	14%
Consent Declaration Logs	3,934,884	7.5 GB	8%
Marketing Consents	3,748,420	7.1 GB	7%
Storici Operazioni Bancarie	2,417,791	4.6 GB	5%
Payment Profiles	1,967,476	3.8 GB	4%
Segment Histories	1,579,340	3.0 GB	3%
Cases	1,113,275	2.1 GB	2%
Accounts	980,205	1.9 GB	2%
Contacts	975,924	1.9 GB	2%
Web Events	852,849	1.6 GB	2%
Mandates	230,501	450.2 MB	0%
Recurring Donation Allocation	226,172	441.7 MB	0%
Recurring Donations	226,170	441.7 MB	0%
Asks History	69,961	136.6 MB	0%

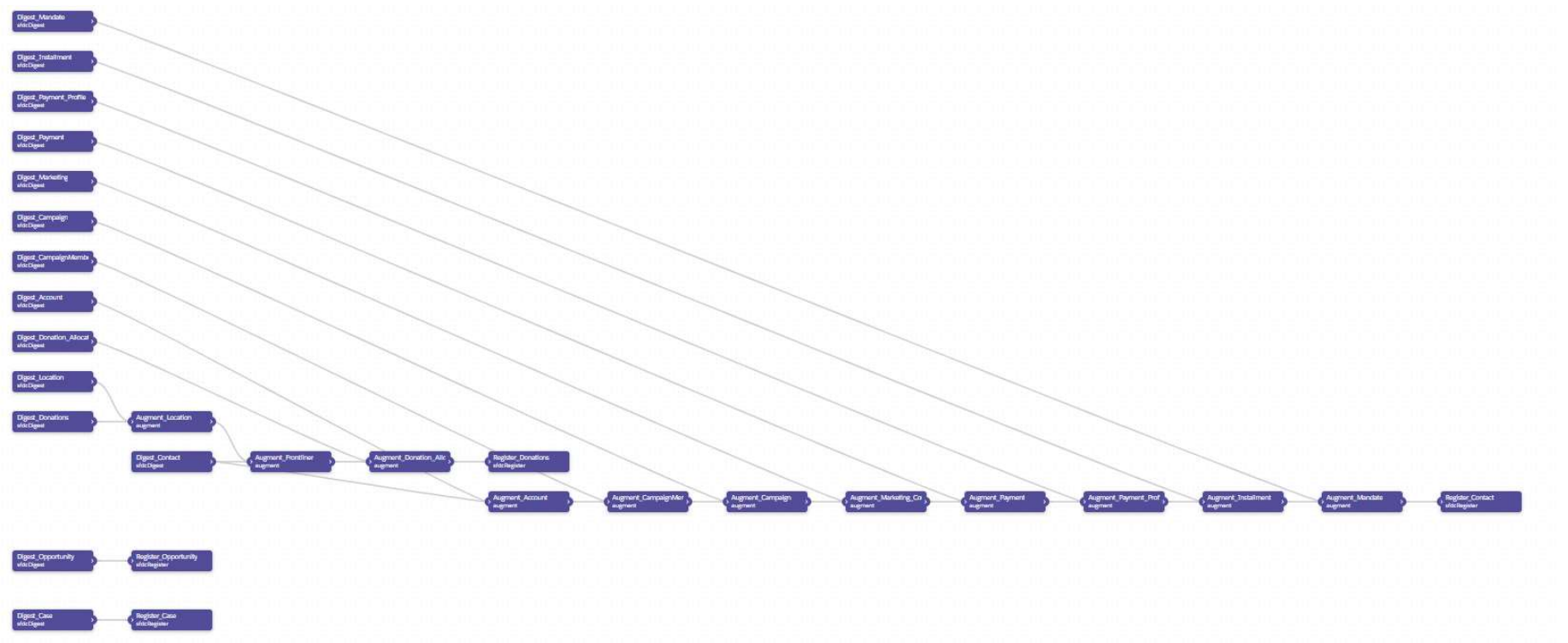
Entity Objects and their Relation

Objects	Relation with Contact	Criteria
Marketing Consent	M:1	Inclusion
Payment Profile	"1:1"	Inclusion
Campaign	"1:1"	Inclusion
Campaign Member	"1:1"	Inclusion
Payment	M:1	Inclusion
Account	M:1	Inclusion
Donations Allocation	M:1	Inclusion
Donations	M:1	Inclusion and Exclusion
Opportunity	M:1	Inclusion and Exclusion
Case	M:1	Inclusion and Exclusion

Design Approach Approach

Requirement	Einstein Capability	Reason
Join Objects for Inclusion	Dataflow	Augment Functionality of Dataflow Creation of Multiple Datasets
Join Object for 1:M relation that has excluision	Recipe	Inner Join Functionality of Recipe
Conditions with less performance impact	Queries in Dashboard	For Free Filter and easier BA modification

Base Dataflow



Recipe Approach

Challenge

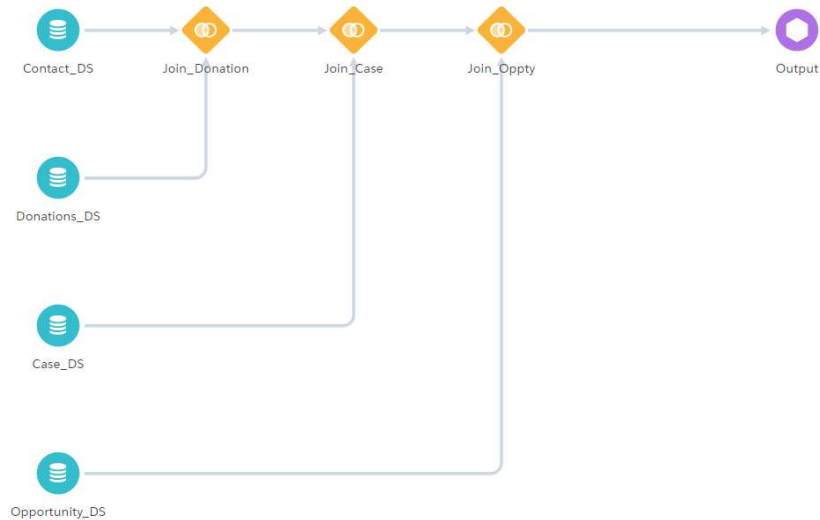
Each dataset can have only 20 Billion rows.
But Joining Opportunities with recurring donation increased the count.

Decision

Have 2 separate datasets for Single Opty and recurring Opties using 2 Recipes

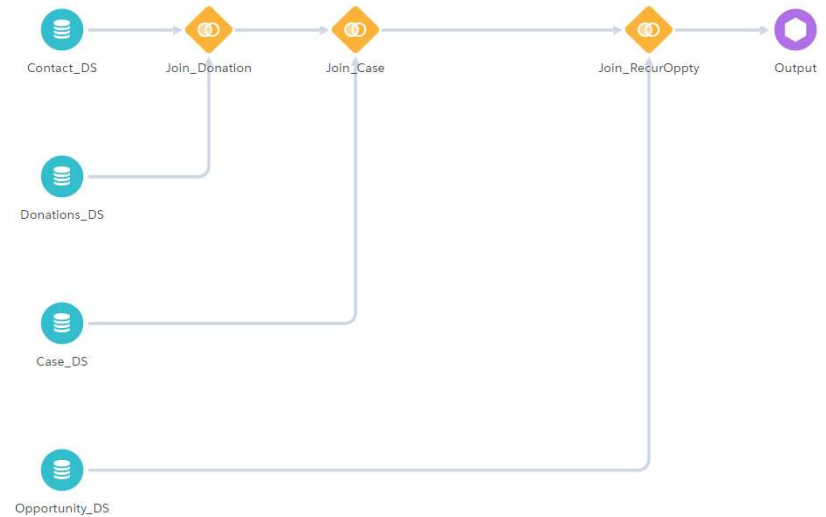
Recipe UNHCR-Opty_Recipe

Got Feedback?



Recipe UNHCR-Don_Recipe

Got Feedback?




Dashboard Approach

-Pg1

Challenge	Decision
Each dashboard can have only 20 Pages. We would need 30 pages in dashboard	Have 2 separate Dashboard organized based on categories

Dashboard - Campaign - Recapturing ▾

Data updated: Today at 05:34

**UNHCR**
The UN Refugee Agency

Recapturing

Recapturing Cancellations

Recapturing Technical-cancellations from the bank

Recapturing Technical-not aligned

Recapturing Technical-technical issues

Recapturing Technical-insufficient funds

Recapturing Cancellations 2 time

Recapturing Technical 2 time-cancellations from the bank

Recapturing Technical 2 time-not aligned

Recapturing Technical 2 time-technical issues

Recapturing Technical 2 time-insufficient funds

Recapturing Fails

Recapturing Technical-expired cards

OO reactivation (ex-regular donors)

CG reactivation (ex-regular donors)

Dashboard Approach

-Pg2

Challenge	Decision
Each dashboard can have only 20 Pages. We would need 30 pages in dashboard	Have 2 separate Dashboard organized based on categories

Dashboard - Campaign - Others ▾

Data updated: Today at 11:24



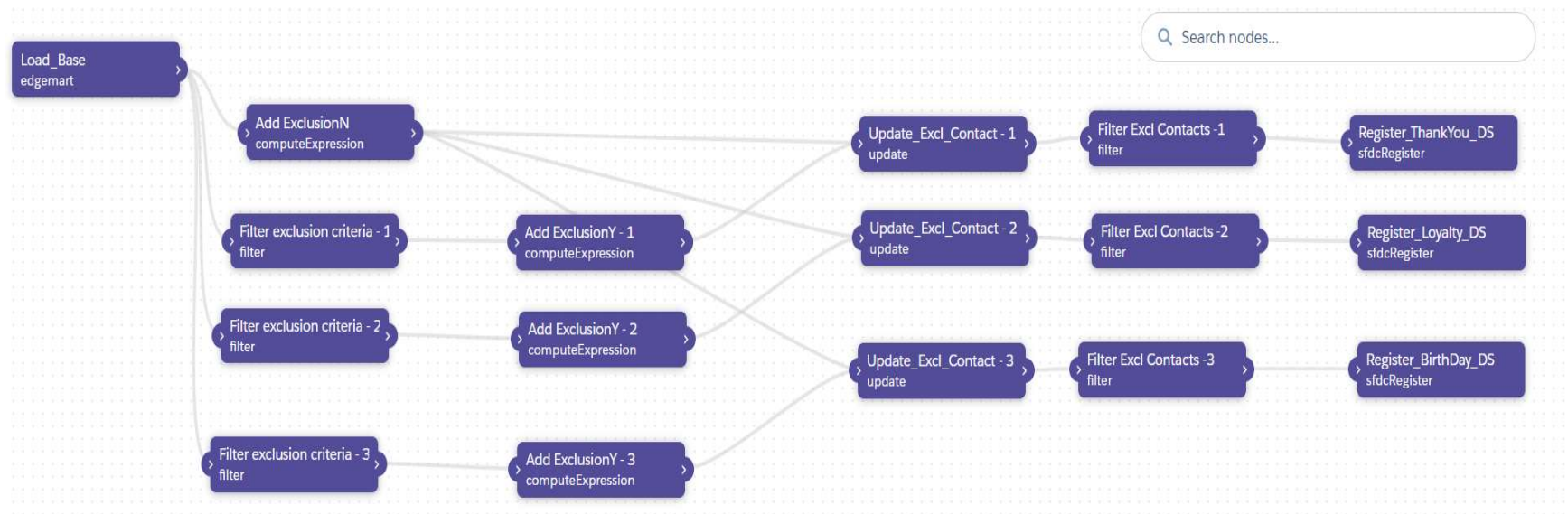
Retention		Conversion		
Thank You	Loyalty	Online first gift		
Birthday Call		Conversion online multi-year		
Cross - Sell		Upgrade		
Cross-sell (regular active)	Potential Middle Donors first appeal	Upgrade standard	Up-upgrade (NO/YES - 24 M)	Up-upgrade (NO/YES - 72-84-96 M)
Cross-sell (with Upload Filter)	Potential Middle Donors second appeal	Upgrade on unavailable	Up-upgrade (NO/YES - 36-48-60 M)	2nd Up-upgrade (NO/YES - 60-72-84-96 M)

Dataflow Approach

Page 1

Challenge	Decision
1) Exclude Contacts based on child entity criteria. Create Multiple Dataflow and use Update Step exclude contacts.	1) Group the Dataflows for similar Exclusion criteria
2) Having one flow for each will result 30 Dataflows but Einstein dataflows executes only Sequentially	2) Handle the inclusion on separately Dashboard queries

Common Exclusion criteria with Parallel flows for Similar Campaign Scenarios

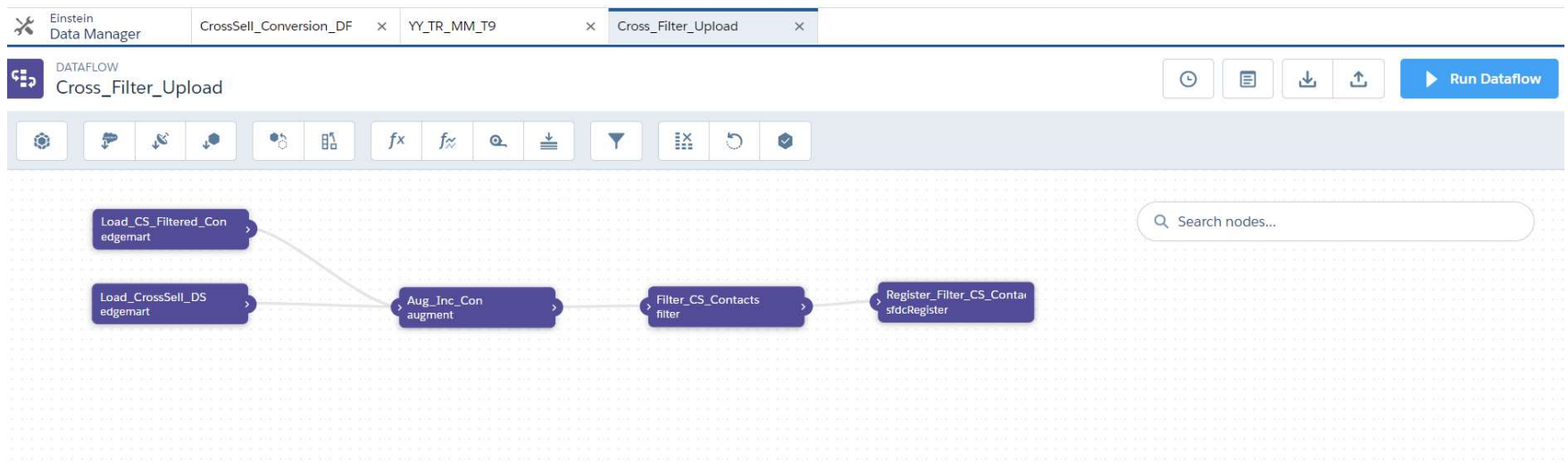


Dataflow Approach

Page 2

Challenge	Decision
1) Include Contacts based on file upload. 2) Joining datasets on Dashboard using Co-group gives Time out issue	1) Use Datasets to upload the csv containing contacts to filter 2) Use Filter criteria in Dataflow.

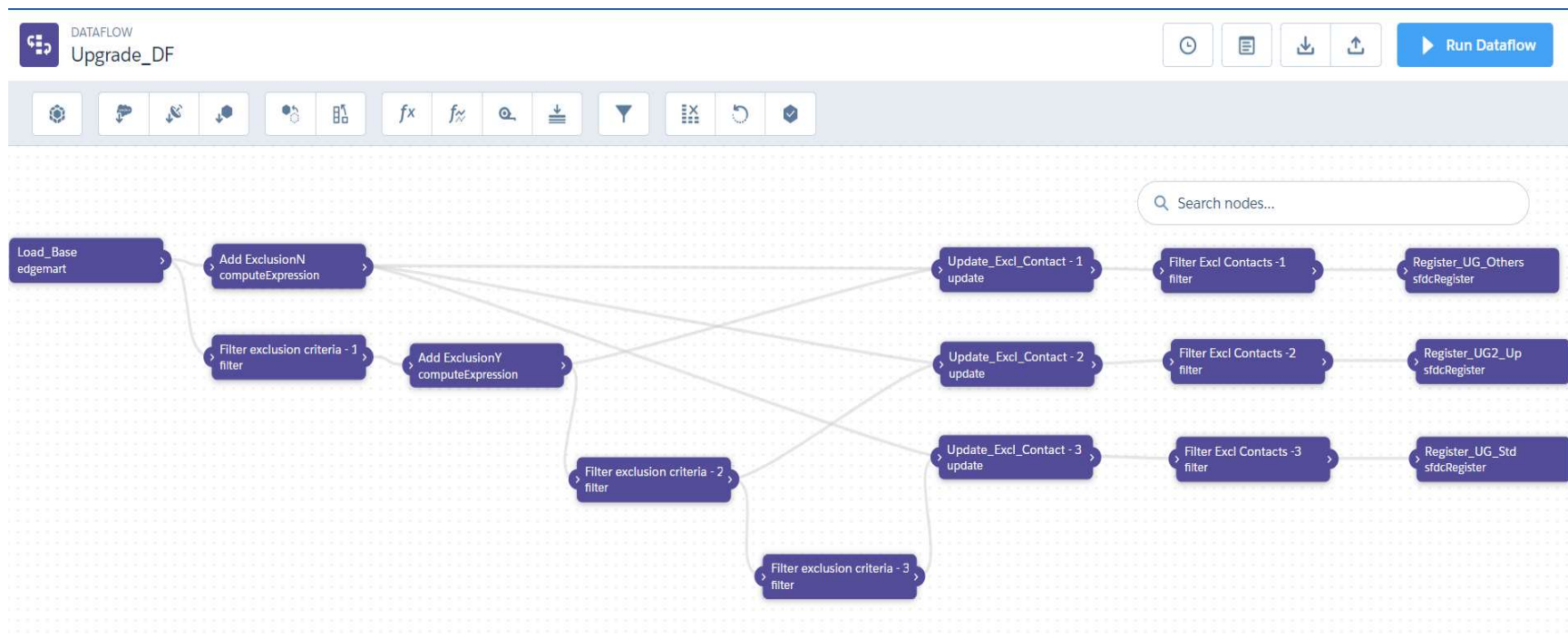
Upload Contacts via csv and Filter them in.



Dataflow Approach

Page 3

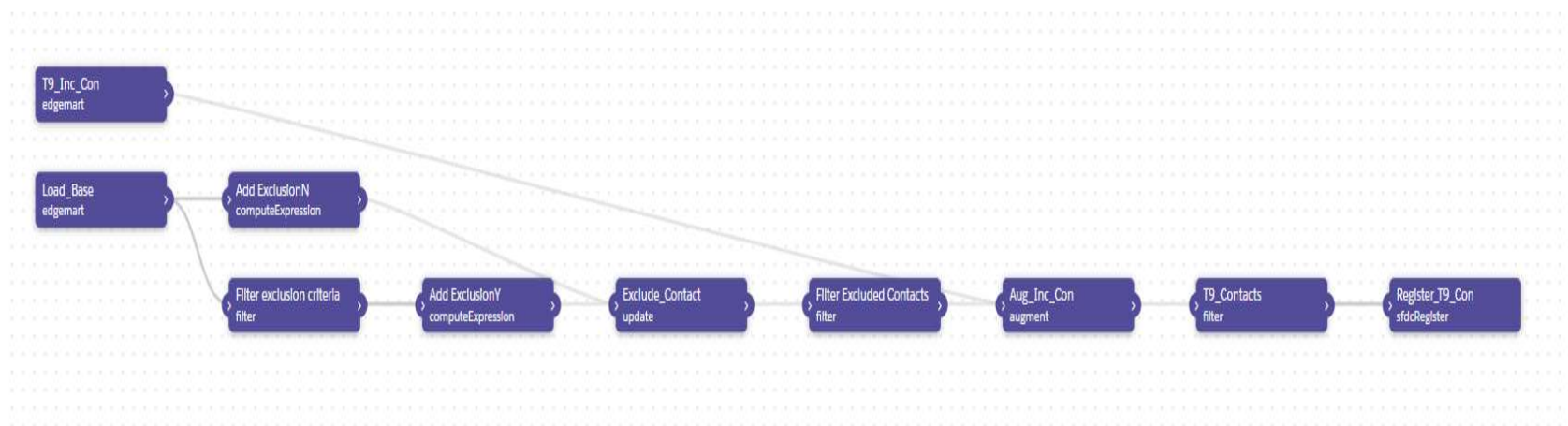
Exclusion criteria that has subset criteria



Dataflow Approach

Page 4

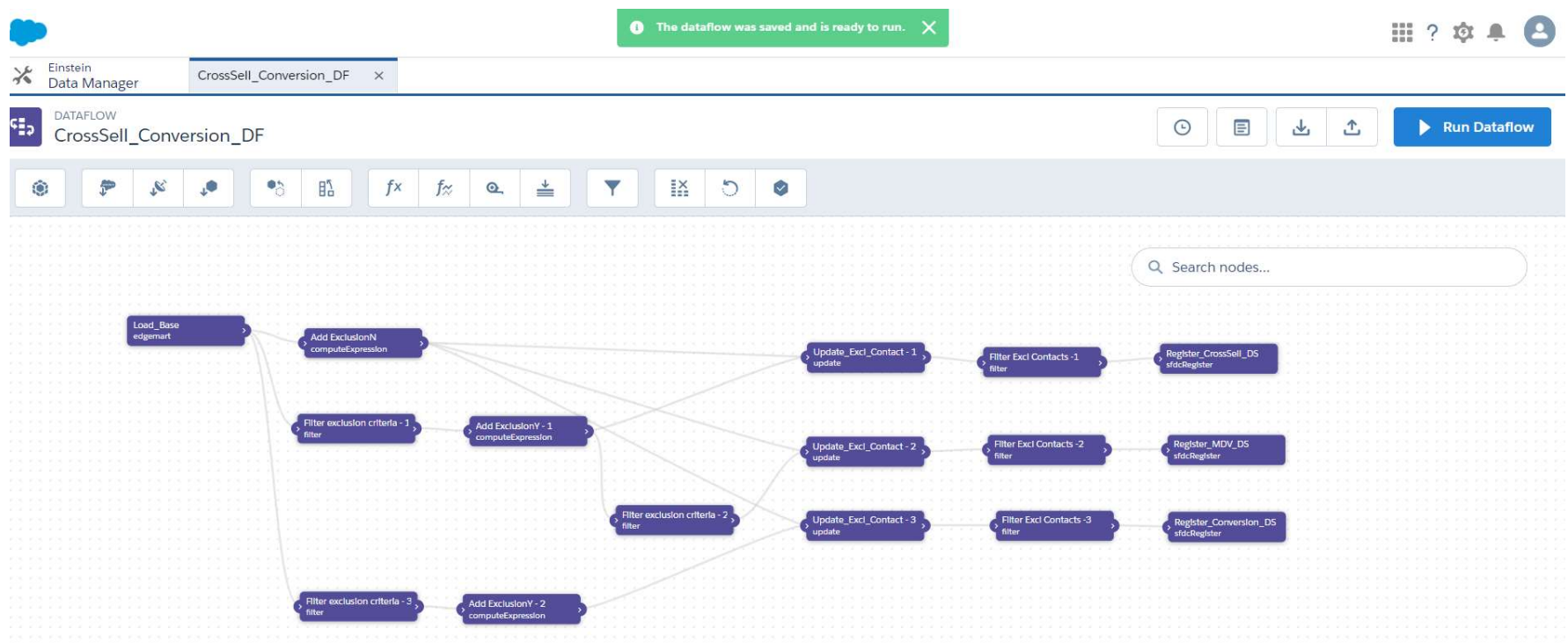
Combination of 1 and 2



Dataflow Approach

Page 5

Combination of 1 and 3

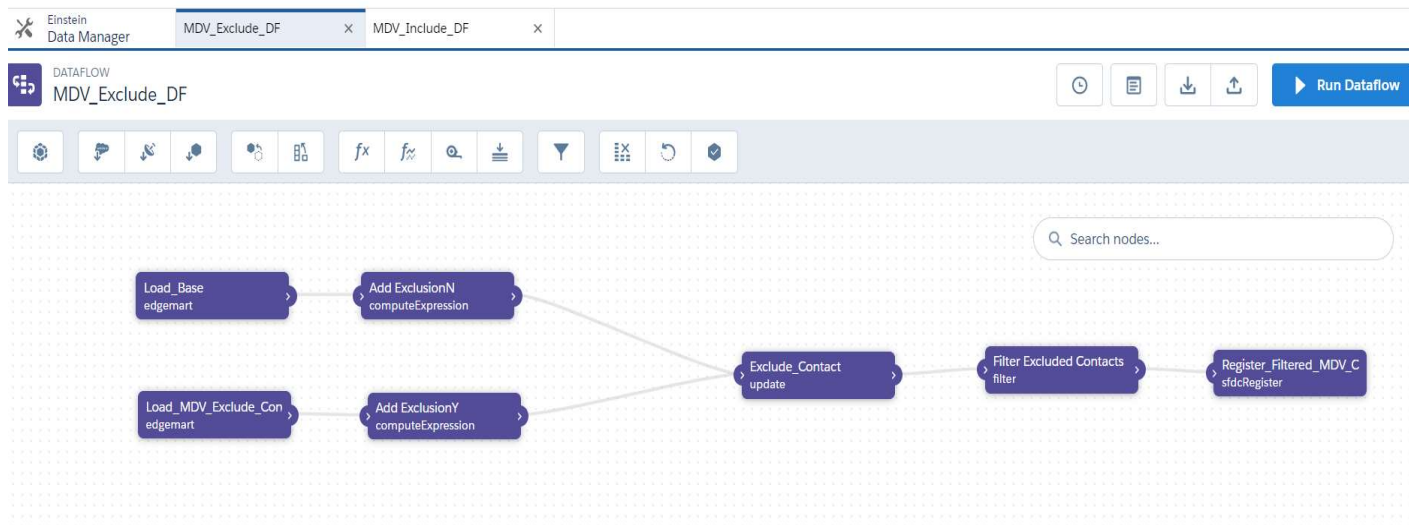


Dataflow Approach

Page 6

Challenge	Decision
1) Exclude Contacts based on file upload. 2) Joining datasets on Dashboard using Co-group gives Time out issue	1) Use Datasets to upload the csv containing contacts to filter 2) Use Filter criteria in Dataflow to exclude.

Upload Contacts via csv and Filter them out.



Thank You