

## Phase 6: User Interface Development-

# -----***AI Flow Integration***

### : **AI-Powered Next Service Appointment Flow Integration**


#### Brief Description:

In this phase, a Screen Flow was developed and embedded into the Contact Record Page to provide an AI-driven summary of the next service appointment for each contact. The Flow uses **Einstein GPT (Agentforce)** to automatically fetch and summarize upcoming service appointments from the related Service\_Appointment\_\_c records. This integration demonstrates:








- **Process Automation:** Flow Builder + GPT Prompt Action
- **User Interface:** Lightning App Builder embedding
- **Real-time AI Assistance:** Displays next service appointment directly on the Contact page
- **Fallback Handling:** Shows a message if no upcoming appointments exist

#### Key Steps Covered:

1. Created **Prompt Template:** `Next_Service_Appointment`
2. Configured **Screen Flow:**
  - Start variable → Contact record
  - GPT Action → Generate Record Summary
  - Screen element → Display AI response (`{!AI_Response}`)
3. Embedded Flow into **Contact Record Page** using Lightning App Builder
4. Tested Flow to ensure accurate AI response for different contacts



Search Setup



SetupHomeObject Manager

Q einstein se

Einstein

Einstein Generative AI

Einstein Setup

Einstein Search

Promoted Search Terms

Search Layouts

Search Manager

Analytics

Index Management

Query Configurations

Settings

Synonyms

Didn't find what you're looking for?  
Try using Global Search.

SETUPEinstein Setup

Turn on Einstein

Enhance your Salesforce data with generative AI to create relevant, customized experiences for your users. [Learn more in help.](#)

☒On

Turn on Global Language Support for Prompt Builder

Use global languages with prompt templates. Some elements of the Einstein Trust Layer may not be available for these languages. See [Einstein Trust Layer Region and Language Support](#).

☒On

Deploy Prompt Templates

Activate and deactivate prompt templates when deploying between sandbox and production using change sets.

☐Off

## \* Prompt Template Type

### Field Generation

Case Details

Einstein AI-Generated Search An

✓ Field Generation

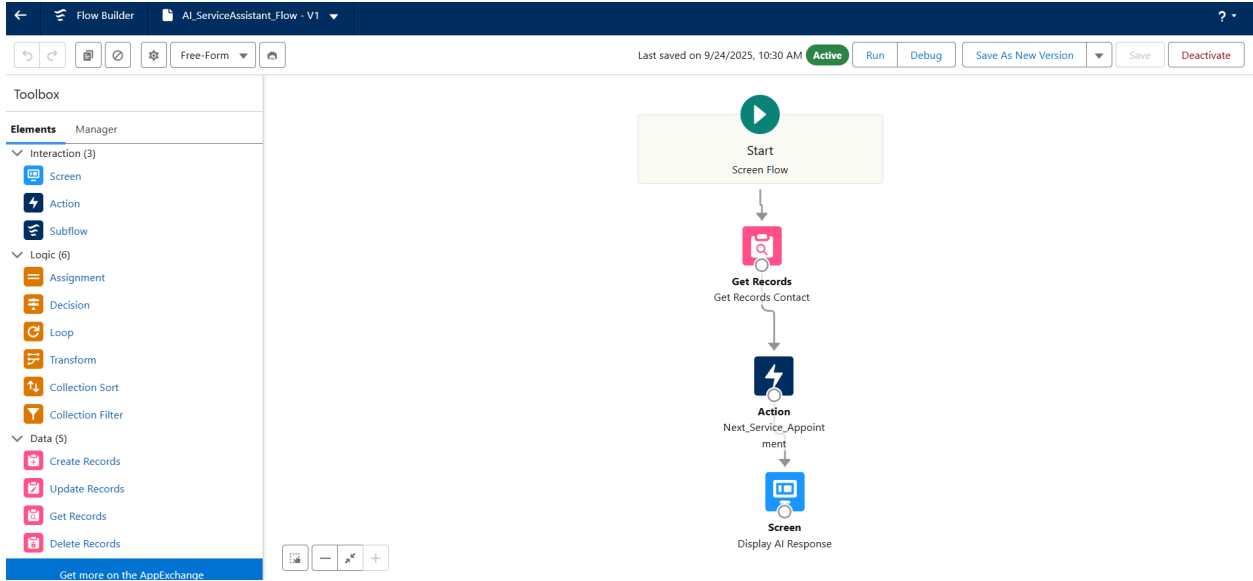
Flex

Global Standard

Knowledge Answers

Record Summary

Security Risk Analysis



**AI\_ServiceAssistant\_Flow**

No upcoming appointments. Book here: [link].

[Finish](#)

Ashok Motors Sales | Leads | Accounts | **Contacts** | Opportunities | Test\_Drive\_cs | Service\_Appointment\_cs | Dashboards

**Create\_Test\_Drive**

Test Drive Date & Time:

Vehicle Model:

[Next](#)

**AI\_ServiceAssistant\_Flow**

No upcoming appointments. Book here: [link].

[Finish](#)

**Available Test Drive Slots**

- 2025-09-23T01:24:27.000Z	<a href="#">Book</a>
- 2025-09-23T01:37:02.000Z	<a href="#">Book</a>
a06gL00000BznFBQAZ - 2025-09-24T19:00:00.000Z	<a href="#">Book</a>