



Knowledge Einstein Article Recommendations

Case Deflection Flow Template



@salesforcedocs

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ABOUT THIS GUIDE

This guide gives insights into the latest updates to the app, what's been added, and how it works in the Lightning UI.

EDITIONS

Available in Lightning Experience.

- Enterprise
- Developer
- Performance
- Unlimited

USER PERMISSIONS

To install and customize the package:

- Download AppExchange Packages

To edit the Flow Templates:

- Manage Flow

To run the Flow Templates:

- Run Flows

Overview

Integrate the power and flexibility of Flow Builder with Einstein Article Recommendations to quickly answer customer questions and deflect cases. Use the flow templates to display recommended knowledge articles or send them via email so customers can resolve issues before an agent is required to provide support.

Limitations

- This package only works if the Knowledge Object API name has not been changed.

Install and Configure

Before installing and configuring the Knowledge CRM Analytics package, make sure:

- **Knowledge** is enabled in your org. [Learn More](#)
- **Einstein Article Recommendations** is enabled in your org. [Learn More](#)
- The **Article Recommendation Model** is built and active in your org. [Learn More](#)
- Access additional help in the Salesforce [Help Center](#)

Install the Managed Package

1. From the AppExchange, click **Get it Now**.
2. Choose whether to install in production or a sandbox.
3. Log into your Salesforce org when prompted.
4. Choose **Install for Admins Only**.
5. Click **Install**.
6. Follow the prompts to complete the app installation.

Create and Activate Flow

1. Go to Setup -> Process Automation -> Flows
2. Click on **“EAR Screen Flow”** to access the Flow Builder
3. Follow the steps on the [“Mandatory Setup”](#) section of this guide
4. Click on the “Save As” button and a modal will be opened
5. Give your Flow a Name
6. If the Flow will be used in self-service contexts, click on “Show Advanced” -> “How to Run the Flow” and select “System Context Without Sharing – Access All Data”
7. Save and Activate the Flow
8. Add the Flow to a Lightning Page (for internal service contexts) or to an Experience Cloud Page (for self-service contexts)

Case Deflection Flow

This flow prompts the user to enter a subject and description, creates a Case and displays Article Recommendations based on the newly submitted Case.

Please provide a description of your support request.

* Subject

Unable to Login

* Description

I cannot login - can you reset my password? I am pretty sure I have the right email address, but I still cannot log in.

Next

Do the article(s) below solve your problem?

[How do I reset my password?](#)
If you are unable to login, you can use these instructions to reset your password.

[Unable to login after upgrading](#)
Customers may be unable to upgrade their account after upgrading their tier. To fix this issue, have the customer reset their password.

* Did this solve your problem?

--None--

Previous

Next

Flow Outcomes

Recommendations solved the problem

If the Article recommendations solved the user’s problem, the Case will be closed.

Do the article(s) below solve your problem?

[How do I reset my password?](#)
If you are unable to login, you can use these instructions to reset your password.

[Unable to login after upgrading](#)
Customers may be unable to upgrade their account after upgrading their tier. To fix this issue, have the customer reset their password.

* Did this solve your problem?

✓ --None--

Yes

No

Previous

Next

We are happy we were able to solve your problem!

Have a wonderful day, and thanks for contacting our organization.

Finish

Recommendations did not solve the problem

If the Article recommendations did not solve the user's problem, they should submit their contact information in order to finalize the open Case.

Please submit your contact information below to finish creating your case.

* Name

...

* Email

you@example.com

Phone

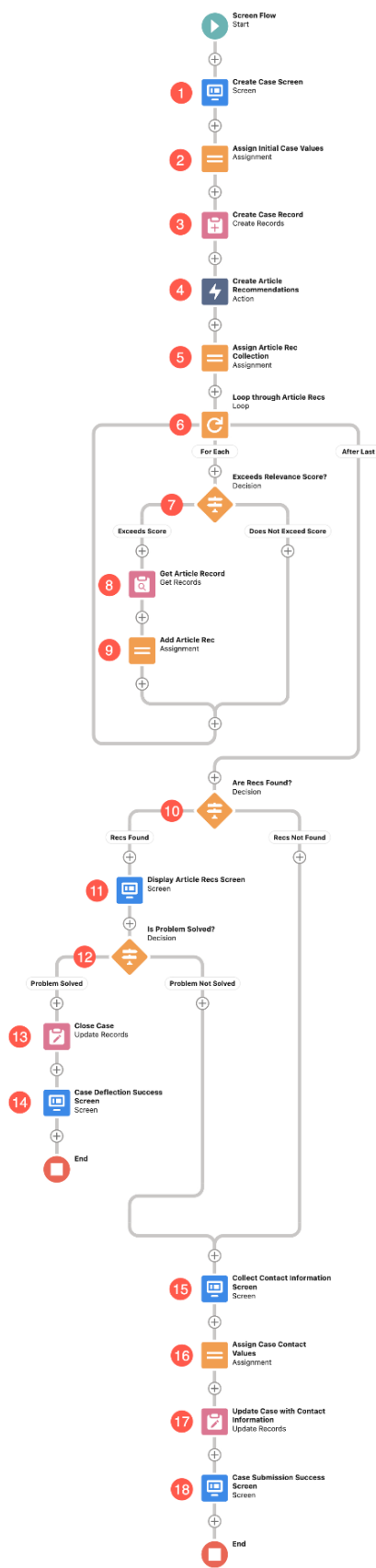
Previous

Next

We have successfully received your inquiry. A support agent will be in touch to help solve your problem as soon as possible.

Finish

Flow Elements



1. **Create Case Screen:** includes two input elements and asks users to provide a description for their support request.
2. **Assign Initial Case Values:** assigns the information the user has input into a Case variable.
3. **Create Case Record:** creates the Case record.
4. **Create Article Recommendations:** takes the created Case ID as input and returns a JSON list of recommended articles identified from your active Einstein Article Recommendations model.
5. **Assign Article Rec Collection:** assigns the recommended articles to the “Article_Rec_Collection” variable.
6. **Loop through Article Recs:** iterates over the articles stored in “Article_Rec_Collection”
7. **Exceeds Relevance Score:** checks if the article exceeds a relevance score of 80.
8. **Get Article Record:** If the article exceeds the score, it looks for the Knowledge Object record.
9. **Add Article Rec:** adds article record to the “Recommendation_Text_Template”
10. **Are Recs Found:** checks if there were articles found.
11. **Display Article Recs Screen:** if there were articles found, they are shown to the user. User is asked if any of the articles solved their problem.
12. **Is Problem Solved:** checks if the problem has been solved or not.
13. **Close Case:** if the answer to step 12 is yes, it closes the created case.
14. **Case Deflection Success Screen:** shows a success message to the user.
15. **Collect Contact Information Screen:** if the answer to step 12 is no, it asks the user to submit their contact information.
16. **Assign Case Contact Values:** assigns contact information to the Case variable
17. **Update Case with Contact Information:** updates the Case with the user’s information.
18. **Case Submission Success Screen:** shows a success message to the user.

Mandatory Setup

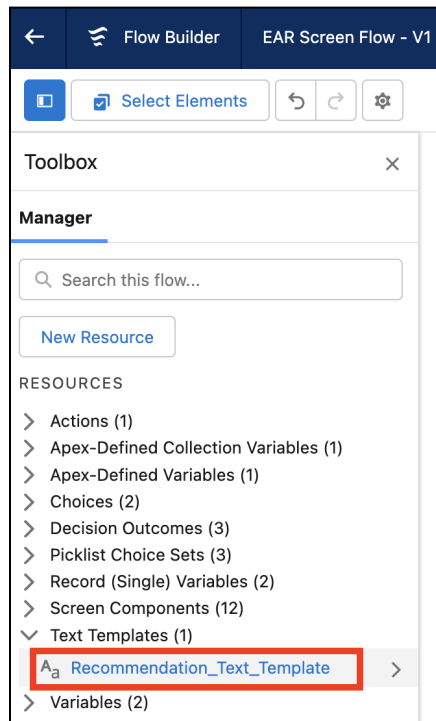
Add a new value to the Case Status picklist field

1. Go to Setup -> Object Manager -> Case
2. Go to the Fields & Relationships tab and click on Status.
3. In the Case Status Picklist Values section click the button New.
4. Write ‘Closed - Deflected’ and save.

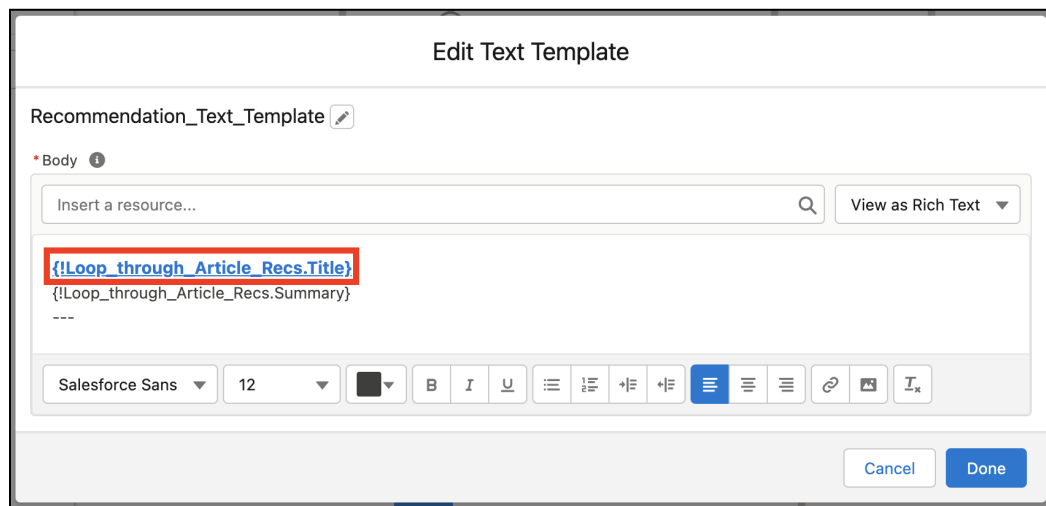
Customize the article hyperlinks to your Salesforce instance

You’ll need to modify the article hyperlinks in the screen flow, so that they redirect to your Experience Cloud portal or Service Cloud instance.

1. In the Flow Builder, go to the Resource manager panel on the left hand side.
2. Click the “Recommendation_Text_Template” variable to edit it.



3. Double-click on the link that says “`{!Loop_through_Article_Recs.Title}`”.



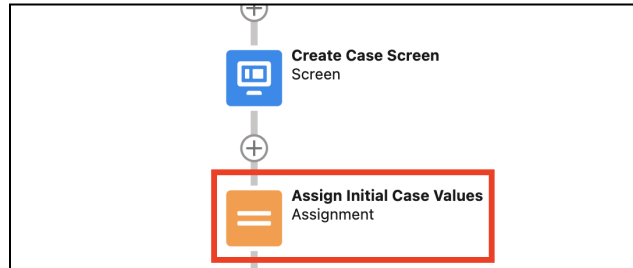
4. For internal service contexts: In the “Link URL” popup that opens, enter the URL “https://MY_ORG.lightning.force.com/lightning/r/Knowledge_kav/{!Loop_through_Article_Recs.knowledgeArticleId}/view” (without quotation marks). Replace “**MY_ORG**” with the My Domain name of your org.
5. For self-service contexts: In the “Link URL” popup that opens, enter the URL “https://mydomain.force.com/customersupport/s/article/{!Get_Article_Record.UrlName!}” (without quotation marks). Replace “<https://mydomain.force.com/customersupport/>” with the base URL of your Experience Cloud site.

Optional Configuration

Set the case origin based on where you're embedding the Flow

You can set the “Case Origin” field based on where you're embedding the Flow. By default, it's set to Web.

1. Click on the “Assign Initial Case Values” Flow element



2. Change “Case Origin” field based on where you're embedding the Flow

The 'Edit Assignment' dialog box for the 'Assign Initial Case Values' element. It shows a table of variable assignments. The third row, 'Case > Case Origin', is highlighted with a red box. The table has columns for Variable, Operator, and Value. The first row is 'Case > Subject' with 'Equals' and 'Subject'. The second row is 'Case > Description' with 'Equals' and 'Description'. The third row is 'Case > Case Origin' with 'Equals' and 'Website'. The fourth row is 'Case > Status' with 'Equals' and 'New'. There are 'Cancel' and 'Done' buttons at the bottom right.

Variable	Operator	Value
Case > Subject	Equals	Subject
Case > Description	Equals	Description
Case > Case Origin	Equals	Website
Case > Status	Equals	New

Set the article filter based on where you're embedding the Flow

By default, the Flow will only display articles that are set to be exposed on a public knowledge base, by filtering on “IsVisibleInPkb = True”. If you're not embedding this Flow in a public knowledge base, change this filter (e.g. to IsVisibleInApp, IsVisibleInCsp, or IsVisibleInPrm; see the documentation [here](#)).

1. Click on the “Get Article Record” Flow element

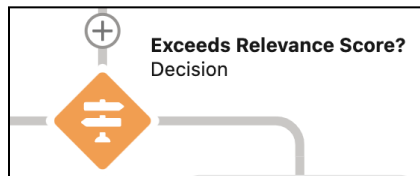


2. Change “IsVisibleInPkb” field

Customize the article relevance threshold

You can customize the threshold for the article relevancy score. Only article recommendations that exceed this score, will be shown to the customer. As a generic starting point, 80% provides good results for most customers in most situations. However, we recommend you finetune the threshold based on your specific business and use case. To get an idea of a good threshold, look at cases in the Service Console and observe the relevancy score of the top suggested articles in the Knowledge widget. You might also consider changing the threshold based on the audience. For example, you might want to use a higher threshold for self-service users or auto-email responses, and a lower threshold for internal service agents.

1. Click on the “Exceeds Relevance Score?” Flow element

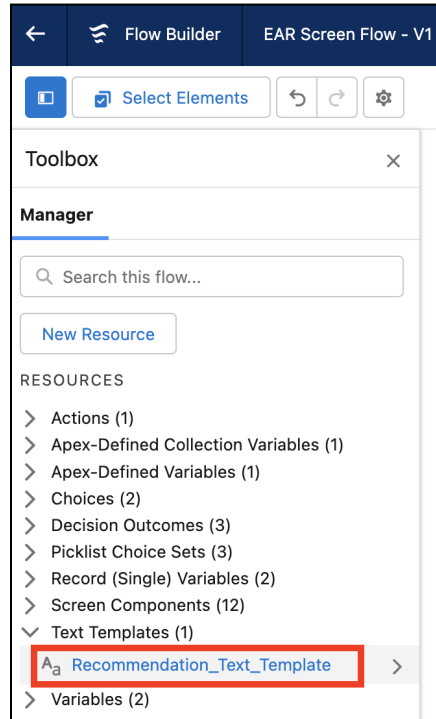


2. Change the Relevance Score

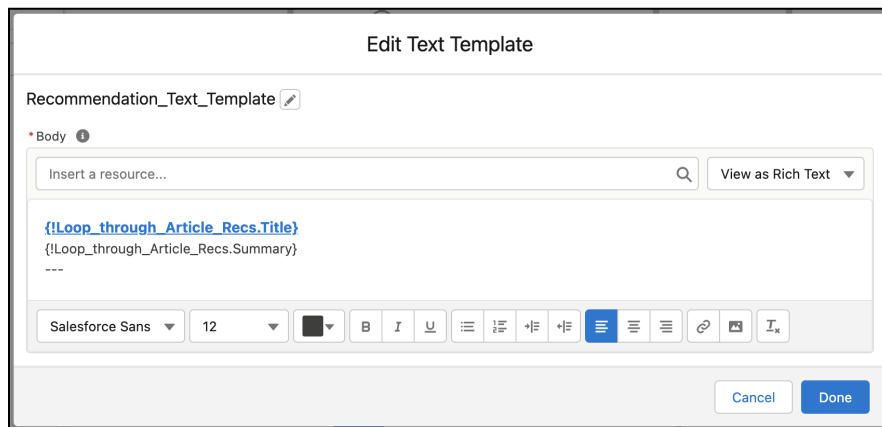
Customize the template for article recommendations

You can customize how each article recommendation will be displayed. You can set which fields are shown, what font is used, etc. Don't forget to embed a link to the article; by default, this link is set on the title.

1. In the Flow Builder, go to the Resource manager panel on the left hand side.
2. Click the “Recommendation_Text_Template” variable to edit it.



3. Customize how the recommendations will be displayed.



Application Changelog

[1.0] - 2023-01-10

- First version of the package