

Tracey Bot Installation Guide - Salesforce Labs AppExchange Package

👋 Welcome to Tracey Bot's Install Guide! 👋

Tracey Bot is an Einstein Bot that facilitates contact tracing across your organization of participants and external contacts. It enhances and quickly scales up any manual contact tracing initiative by using a conversational bot to engage by phone and messaging. Tracey then goes to work creating the tracing web, leading to notifications that prevent further exposures. Tracey Bot can be used across a variety of channels like SMS, chat, WhatsApp, and more!

Please read this document in full before installing to get an understanding of how Tracey Bot works!

Latest Version Package Link (v1.2)

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000GFjqQUAT>

Pre-Requisites and Best Practice Suggestions

1. Your org must be **setup and configured** with:

- Work.com's [Contact Tracing](#) enabled (including [enabling Person Accounts](#) and [Health Cloud](#))
- [Chat](#) enabled (including setting up [Omni-Channel](#), [Routing Configuration](#), and [Queues](#))
- [Messaging](#) enabled (***you need an active messaging channel and Messaging End Users properly associated with Contact records***), or you can use chat as your channel (*but you will not have outbound messages*)
- [Einstein Bots](#) enabled

2. **Messaging channel opt-in and consent:**

- Prior to installing Tracey Bot, we assume the organization will have already surveyed for and collected the participant's channel preferences from a different source. During this time, we recommend that:
 - The organization suggests that the participant saves the organization's unique channel identifier (*e.g. phone number*) to their device(s) so that it is easily recognizable during future communications
 - The organization makes it clear at time of channel preference collection that sensitive communications, such as contact tracing information, may be exchanged over their preferred channel of choice

3. **Tracey Bot messaging templates:**

- Messaging templates used in Tracey Bot are based on CDC guidance. If you choose to modify these templates, please do so thoughtfully, and/or consult with an expert.

4. **Staffing and support for bot escalations:**

- Tracey Bot offers flexibility of deployment to channels based on the organization's communication strategy. Participants may expect the ability to instantly escalate their bot conversation to a live agent. As a best practice, if the organization chooses to enable live escalations, they should carefully plan and design for supporting and staffing these escalated conversations within a timely manner and established SLA. Because of the sensitivity of health-related issues, we suggest that the organization communicate estimated wait time for an agent to contact the organization member.

5. Receipt of Health Status:

- a. If the organization so chooses, it may design automation around delivering receipt of health status through different channels. For example, an organization member may not require their contacts to be traced based on their responses to Tracey Bot, and email automation can be designed to send that organization member a receipt of their updated health status.

6. Carrier Filtering:

- a. Carrier filtering is a practice where carriers block the delivery of some or all of the messaging coming from a specific number or business. Please review [this](#) knowledge article to understand the common reasons why messages are filtered and the best practices for how to protect against carrier filtering.

How Tracey Bot Works

This section briefly explains some of the inner workings of the Tracey Bot package.

INITIALIZING TRACEY

In order for Tracey Bot to begin the chain of following up with potentially impacted organization members automatically, there must first be a single manually-created Contact Encounter Participant record with the 'Tracey - Notify' checkbox value set to 'True'. After this record is created, we will fire the first outbound notification via a Process Builder, and the Contact associated to that Contact Encounter Participant record will receive a message.

LOGICAL FLOW

There are some very important Tracey Bot aspects that you should be aware of. We can break these down into three buckets: Object Fields, Bot Dialog, and Automation

- **Object Fields:** On the Contact Encounter Participant record, we have added a custom field called 'Tracey - Notify'. In order for the initial outbound messaging notification template to fire from Process Builder, this field value must be set to 'True'. After the first manually-created Contact Encounter Participant record is created with this checkbox value set to 'True', the rest of the associated Contact Encounter Participants submitted by the end participant will have this field automatically set to 'True' when created as new Contact Encounter Participant records. On the Person Account object (Also called "Contact Tracing" object in the Contact Tracing managed package), we've added a custom field called 'Tracey Bot Enabled'. This field value will be changed to 'True' after the organization member consents to the initial outbound notification.
- **Bot Dialog:** There are two message sources within Tracey Bot:
 - 1) If you have chosen to use a messaging channel (e.g. SMS, WhatsApp, etc.), the initial outbound notification message to an organization member is fired from Process Builder.
 - 2) All subsequent message dialog is controlled and configured within the Tracey Bot bot settings.
- **Automation:** Tracey Bot relies heavily on Process Builder and Lightning Flow for automation. Below is a high-level overview of the logical flow of operations when a digital messaging channel (e.g. SMS) is enabled:
 - Contact Encounter Participant record is created with 'Tracey Bot - Notify' field set to 'True'
 - Initial outbound notification is fired from Process Builder
 - The Messaging End User associated with the Contact (derived from the Contact Encounter Participant) receives the message (defined by the outbound notification template) and can choose to opt in to contact tracing
 - If opted in, the organization member is asked to consent to the contact tracing terms and services defined by the organization
 - If the organization member consents, Tracey Bot's bot dialogs continue with the contact tracing process to update

the organization member's health status, collect contact encounter information (*to automatically follow up with those identified*), and (*optionally*) remind the organization member about daily temperature checks

COMMON USE CASES

Tracey Bot is most commonly used in conjunction with a digital messaging channel, such as SMS or WhatsApp, to provide a timely and direct way to interact with the organization members. Chat-based interactions with Tracey Bot are also common, with the organization usually directing their members to a link that contains Tracey Bot embedded as a chat option.

✓ Bot Installation Instructions ✓

1. **Engagement Channel Setup:** Prior to using Tracey Bot, we recommend you enable your org with [Chat](#), [Messaging](#), and [Einstein Bots](#). These three features require separate setup outside of the contents of the steps below. We have included references links above to the corresponding Help & Training documentation.
 - a. For those who intend to use Tracey Bot with Message (e.g. SMS), please ensure that your org is has a properly configured messaging channel (with associated routing configuration and queue) and that you have created and assigned the correct Messaging End Users records to their corresponding Contact Tracing Person Account/Contact records. For more help with creating Message Users with imported data, refer to [this](#) Help & Training document.
2. **Install:** Install Tracey Bot's Managed Package (*for admin users, from [link listed above](#)*)
3. **Messaging Templates:** While installing the managed package, create Messaging Templates.
 - a. Go to Setup > Feature Settings > Service > Messaging > Messaging Templates
 - b. Click **New Template** to create a template with the following properties
 - i. Template Name: Tracey - New Encounter Participant
 - ii. Developer Name: Tracey_New_Encounter_Participant
 - iii. Example Message Copy: *Hi, I'm Tracey, a friendly contact tracing bot. I am contacting you on behalf of {!Organization.Name}. We've identified that you may have come into contact with someone who is known to be positive or is symptomatic for COVID-19. In order to stop COVID-19 from spreading in the community, we follow up with people who have been potentially exposed. We want to work with you to help you get the care that you may need. Reply TRACE to this message to step through an automated contact tracing procedure. To be connected with a live contact tracer, reply AGENT.*
 1. NOTE: When considering updates to messaging templates, please refer to our [best practice guidelines](#) above. Tracey Bot is fully customizable to the requirements of your organization; however, we have developed the default text carefully with input from medical experts and public health guidance. We strongly recommend you take care when customizing this content.
 - c. Click **New Template** to create a template with the following properties
 - i. Template Name: Tracey - Daily Virtual Temperature Check Message
 - ii. Developer Name: Tracey_Daily_Virtual_Temperature_Check_Message
 - iii. Example Message Copy (Review [Best Practice](#) section prior to editing): *Message from {!Organization.Name}: It's time for a daily temperature check. To continue, reply TEMP.*
 - d. [OPTIONAL] Update [Automated Responses](#) for Messaging Channels:
 - i. Go to Setup > Feature Settings > Service > Messaging > Messaging Settings
 - ii. Click the dropdown arrow for your messaging channel, and select 'Edit'
 - iii. Under the 'Automated Responses' sections, update the 'Opt-In Confirmation' text to include opt-out instructions

1. Example Message Copy (Review [Best Practice](#) section prior to editing): *Thanks for opting in and allowing us to send you messages. Reply STOP to opt out of messages.*
4. **Bot User Permissions:** Each bots in Salesforce has a [Bot User](#), whose profile and settings determine what the bot can do and access. We suggest creating a custom bot user for Tracey Bot because it requires access to the additional features and settings listed below. When creating/assigned a bot permission set to a Bot User, ensure the specific Bot User has the “sfcdc.chatbot.service.permset” permissions. There is also a permission set included with the Tracey Bot managed package for access to Tracey-specific fields called “Tracey Bot Admin”. You can assign this to the admin user. Finally, make sure the bot user is assigned the proper contact tracing permission sets listed in this [Help & Training document](#). Below are the additional object access settings required by the Bot User:
 - a. Account: Read/Edit (for Tracey Bot fields)
 - b. Authorization Form Data Use: Read
 - c. Authorization Form Consent: Read
 - d. Contact: Read/Edit (for Tracey Bot fields) (*Including ‘Testing Status’, ‘Status Group’, ‘Account Name’ fields*)
 - e. Data Use Purpose: Read
 - f. Employee: Read/Edit (for Tracey Bot fields)
 - g. Lead: Read/Edit/Create (*Including ‘Health Group’, ‘Status Group’, ‘Diagnosis’ fields*)
 - h. Contact Encounter: Read/Create
 - i. Contact Encounter Participant: Read/Create
 - j. Messaging Session: Read (*Including ‘Lead’ field*)
 - k. Messaging End User: Read (*Including ‘Contact’, ‘Employee’, and ‘Account’ fields*)
 - l. LiveChatTranscript: Read (*Including ‘Contact’, ‘Lead’, and ‘Account’ fields*)
 - m. Care Program: Read (*Including ‘Name’ and ‘Status’ fields*)
 - n. Care Program Enrollee: Read/Create
 - o. Authorization Text: Read
 - p. Authorization Form: Read
 - q. Authorization Form Consent: Read/Create
 - r. Person Life Event: Create
5. **Page Layouts:** Add the Tracey Bot-related fields to relevant objects’ page layouts
 - a. Person Account object:
 - i. Go to Setup > Object Manager > Contact Tracing (API Name= PersonAccount) > Page Layouts > **Click** your desired page layout
 - ii. Add the following fields the page layout:
 1. Tracey Bot Enabled
 2. Tracey Bot - Last Known Temperature
 3. Tracey Bot - Virtual Temp StartDate
 4. Tracey Bot - Last Known Temp Date
 - iii. Click **Save**
 - b. Contact Encounter Participant object:
 - i. Go to Setup > Object Manager > Contact Encounter Participant > Page Layouts > **Click** your desired page layout
 - ii. Add the following fields the page layout:
 1. Tracey Bot - Notify
 - c. Contact Encounter object:

- i. Go to Setup > Object Manager > Contact Encounter > Page Layouts > **Click** your desired page layout
 - ii. Add the following fields the page layout:
 1. Tracey Location Name
 2. Tracey StartTime String
6. **Daily Temperature Checks:** If using Daily Temperature Check Notifications:
 - a. Go to Setup > Process Automation > Flows. Click **Tracey - Virtual Temperature Check Reminders**
 - b. If Activated, click **Deactivate**
 - c. Click **Save As...** (name the flow whatever you'd like).
 - d. On the new flow, Edit the daily start time, by clicking the start node and selecting **Edit**. Set the Start Date, Start Time, and Frequency for this schedule-triggered flow to run as you desire.
 - e. On the two action nodes, edit the following fields to match your org:
 - i. Messaging Channel Unique Name (found from your messaging settings)
 - ii. Messaging Template Unique Name (developer name from [Step 2c above](#))
 - f. Click **Save**
 - g. Click **Activate**
7. **Outbound Notifications (e.g. SMS):** If using outbound notifications to communicate exposures from the creation of Contact Encounters:
 - a. Go to Setup > Process Automation > Process Builder. Click **Tracey - Outbound Trace Notification (Template)**
 - b. If Activated, click **Deactivate**
 - c. Click **Clone** and name the process whatever you'd like
 - d. Inside of the new process, edit the two actions named "Send Notification":
 - i. Change the Messaging Template Developer Name to match the template you created in [Step 2b above](#)
 - ii. Change the Channel Developer Name to the developer name of the Messaging Channel desired (found in Messaging Settings)
 - e. Click **Save**
 - f. Click **Activate**
8. **Configure the Einstein Bot:** Edit the Einstein Bot
 - a. Go to Setup > Feature Settings > Service > Service Cloud Einstein > Einstein Bots. Click **Tracey**
 - b. Click the '**Overview**' Tab
 - i. [Deploy the bot](#) over the appropriate channels.
 1. **NOTE:** If using 'Text' as a channel, the Messaging Settings 'Channel Name' maps to the bot's 'Deployment' in Setup > Messaging Settings. You may have to rename your Messaging 'Channel Name' back in the Messaging Settings setup menu in order to get it to pop up in the bot's 'Deployment' lookup field.
 - c. Assign the proper [Bot User](#) and make any changes to the Bot User that are desired (see [Step 3 above](#))
 - i. **NOTE:** It is very important that your bot user has access to all of the permissions and settings discussed in [Step 3](#). Without proper access to permissions, objects, fields, etc., Tracey Bot will not work properly.
 - d. Make any desired changes to the messaging copy within the [bot dialogues](#) to reflect your organization's requirements.
 - i. In the 'Welcome' dialog, replace [ORGANIZATION] with the name of your organization.
 - ii. If offering inbound contact tracing phone service:
 1. Go to 'Transfer To Agent' dialog and update the first message block to include your unique phone number in the '[PHONE NUMBER]' placeholder

- a. If inbound contact tracing phone service is not offered, edit the dialog accordingly
- e. If your organization chooses to use intent-based artificial intelligence, please refer to our [documentation](#) on understanding and adding utterances as needed to build your bot intent models.
- f. Click **Activate**

9. **Testing Tracey Bot:** Test Tracey Bot's Outbound Notification

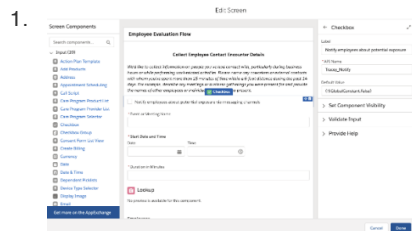
a. **Background:** Tracey Bot's initial outbound notification is dependent on the manual creation of a Contact Encounter Participant record (this record is typically created while recording a Contact Encounter). The newly created Contact Encounter Participant record must have the field value 'Tracey Bot - Notify' set to 'True'. Once the new Contact Encounter Participant record is created with the 'Tracey Bot - Notify' checkbox set to 'True', the **'Tracey - Outbound Trace Notification'** Process Builder created in [Step 6](#) will fire and send the outbound notification from the listed Messaging Channel to the participant's Person Account Personal Mobile Phone field value. After receiving the initial outbound message, you can converse with Tracey to test it's functionality!

b. **Example Testing Procedure 1:**

- i. We assume that the test Contact has been set up with the proper value in the Mobile Phone field in their Person Account, and that a Messaging User has been associated to the Contact. The easiest way to quickly set up a test Messaging End User is to send a message inbound to the channel identifier that you've configured in Messaging Settings. Other methods involve [bulk import](#) of Messaging Users via a tool such as Data Loader. Then, navigate to the Messaging User record, and add your test Contact using the Contact Lookup field. You may have to create a new Messaging User list view for 'All Messaging Users' (*with the appropriate filters*) to view this newly created Messaging User.
- ii. Next, go to an existing Contact Encounter record, navigate to the Related Lists, and manually add a Contact Encounter Participant by clicking the 'New' button. Select your test Contact in the Contact lookup field and manually check the 'Tracey Bot - Notify' checkbox. Upon record creation, you should receive the initial outbound notification and will then be able to interact with Tracey Bot!

c. **Example Testing Procedure 2:**

- i. Alternatively, you can edit the out-of-the-box contact tracing-related Lightning Flows ('Employee Evaluation Flow' on the Task record or 'Employee Contact Collection' on the Contact record) to check the Contact Encounter Participant 'Tracey - Notify' checkbox. To do this, find the 'Add Encounters' and 'External Contacts' screens, and add checkbox screen components describing it's functionality (see example image 1 below). Then, find the create contact encounter participant Lightning Flow steps, and set the 'TRACEY__Tracey_Bot_Notify__c' field values equal to the variables created in the screen components. (see example image 2 below)



2.

Edit Create Records

Create Salesforce records using values from the flow

Create Contact Encounter Particip... (Create, Contact, Encounter, Participant, O...

How Many Records to Create

One
Multiple

How to Set the Record Fields

Use all values from a record
Use separate enclosures and literal values

Create a Record of This Object

Object
Contact Encounter Participant

Set Field Values for the Contact Encounter Participant

Field
ContactEncounterId

Value
ContactEncounterId X

Field
ContactId

Value
Contact from Primary Contact - Contact ID X

Field
TRACEY__TRAIL__TEMP__C

Value
Tracey_Temp X

+ Add Field

Manually assign variables (advanced)

Cancel Done

10. Enjoy! 😊

📦 Package Contents 📦

The Tracey managed package comes with the following metadata:

	A	B	C
1	Type	Name	Description
2	Apex Class	Tracey_EncounterQuery	Needed a class to take a list of ContactEncounter IDs in, and return a Collection of objects out (cant do that in flow).
3	Apex Class	Tracey_EncounterAddAccountParticipants	Creates new encounter participants to an encounter by a comma seperated list of email addresses supplied
4	Apex Class	Tracey_GetEncounterParticipants	Get Encounter Participants by list of Encounter IDs
5	Apex Class	Tracey_Tests	Test Class
6	Bot	Tracey	The einstein bot containing the dialogs and conversation flows for Tracey
7	Custom Field	Account.Tracey_Bot_Last_Temperature__c	The last temperature reading for the employee
8	Custom Field	Account.Tracey_Bot_Last_Temp_Date__c	The last temperature reading date for the employee (for virtual temperature check)
9	Custom Field	Account.Tracey_Bot_Enabled__c	Denotes that the employee is opted in to Tracey
10	Custom Field	Account.Tracey_Bot_Virtual_Temp_StartDate__c	First date of virtual temperature check for employee
11	Custom Field	ContactEncounter.Tracey_Location_Name__c	Formula field to display the location name on the encounter
12	Custom Field	ContactEncounter.Tracey_StartTime_String__c	Formula field for string representation of the encounter start time
13	Custom Field	ContactEncounterParticipant.Tracey_Bot_Notify__c	Checkbox denoting if the participant should be notified of the encounter via Tracey
14	Custom Field	Lead.Tracey_Bot_Last_Temperature__c	The last temperature reading for the external contact

15	Custom Field	Lead.Tracey_Bot_Enabled__c	Denotes that the external contact is opted in to Tracey
16	Custom Field	Lead.Tracey_Bot_Virtual_Temp_StartDate__c	First date of virtual temperature check for external contact
17	Custom Field	Lead.Tracey_Bot_Last_Temp_Date__c	The last temperature reading date for the external contact (for virtual temperature check)
18	Permission Set	Tracey_Bot_Admin	Permission set granting access to all custom fields and apex classes
19	Flow	Tracey_Add_Lead_Encounter_Participant	
20	Flow	Tracey_Consent_Management_Query	
21	Flow	Tracey_Create_Contact_Encounter	
22	Flow	Tracey_Create_Lead	
23	Flow	Tracey_Enroll_Person_Account	
24	Flow	Tracey_Enroll_Lead	
25	Flow	Tracey_Get_Account_Settings	
26	Flow	Tracey_Get_Contact_Encounters	
27	Flow	Tracey_Get_Health_Status	
28	Flow	Tracey_Get_Person	
29	Flow	Tracey_Lookup_Lead_by_Email	
30	Flow	Tracey_Refresh_Contact_Encounter	
31	Flow	Tracey_Set_Account_Settings	
32	Flow	Tracey_Set_Temperature	
33	Flow	Tracey_Update_Health_Status	
34	Flow	Tracey_Virtual_Temperature_Check_Reminders	
35	Process Builder	Tracey_Outbound_Notification_Traces	

🤔 Troubleshooting 🤔

- **Problem:** A new Contact Encounter Participant has been created with the 'Tracey - Notify' checkbox checked, but no outbound notification message template was sent to the phone listed on the contact tracing Person Account record.
 - **Solution(s):** Ensure the contact tracing Person Account 'Tracey Bot Enabled' checkbox field is set to 'True'. Ensure the outbound messaging template has not been edited to add a lot of extra characters or any special characters (like quotation marks)
- **Problem:** The initial outbound message is received by the contact, but Tracey Bot does not respond to an inbound message.
 - **Solution:** Ensure the correct Routing Configuration and Queue configuration has been set up and associated with the messaging channel in Setup.
- **Problem:** *[If installing in a full Health Cloud org only]* You receive a flow error 'Error Occurred During Flow "Tracey_Consent_Management_Query": The flow failed to access the value for CareProgram.Id because it hasn't been set or assigned.'
 - **Solution:** Ensure that the Person Account record's 'Care Program Enrolled' checkbox field is set to 'True'
- **Problem:** You receive a flow error 'Error Occurred During Flow "Tracey_Update_Health_Status": The flow tried to update these records: null. This error occurred: INVALID_OR_NULL_FOR_RESTRICTED_PICKLIST: Status Group: bad value for restricted picklist field: Symptomatic.'
 - **Solution:** The Person Account object's 'Status Group' picklist field expects custom values that must be added in Setup > Object Manager. Follow [this Help & Training article](#) to customize the Status Group picklist values.

👤 We'd love to hear your feedback! 👤

Please post comments in our AppExchange page