Hyro for Salesforce

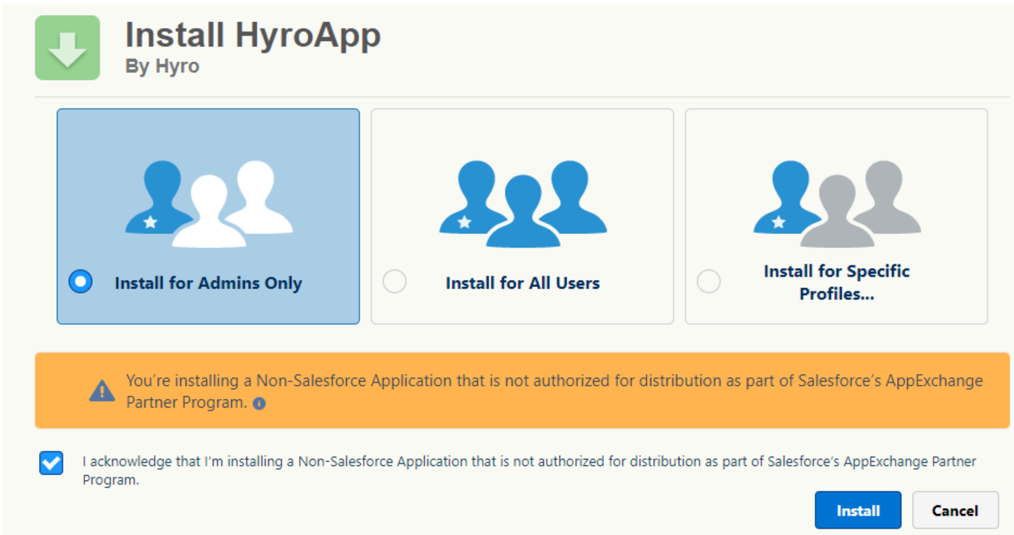
Admin Guide

Spring ‘24

Contents

Package Installation

1. Go to Salesforce AppExchange.
2. Search for Hyro.
3. Click 'Get it now'.
4. Install in a new trial org or use your existing Salesforce credentials to log in.
5. You'll be redirected to the package's installation screen:
    a. Choose 'Install for Admins Only'
    b. Check the checkbox on the bottom of the window
    c. Click Install



    d. Check the checkbox to grant access to all required trusted sites and click 'Continue'.
        i. Trusted sites are the Hyro apps backend service and Hyro's authentication service (auth0)
    e. The installation will now begin. This might take a few minutes, you'll receive an email once the installation is completed.
    f. To validate the package installation:
        i. Go to Setup
        ii. Search 'Installed packages' in quick find
        iii. Under 'Installed Packages', search for Hyro.

Package Setup

Prerequisite

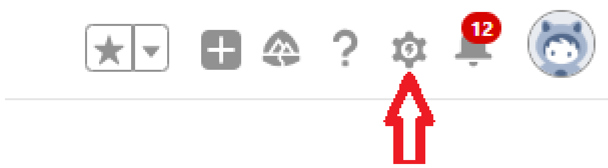
Create a Hyro Integration User:

The integration user will be used for setting up the virtual assistants, fetching knowledge articles, and to query Salesforce standard and custom objects and fields

The integration User should be assigned with the permission set “Hyro Integration”

Add the Hyro Admin Permission Set:

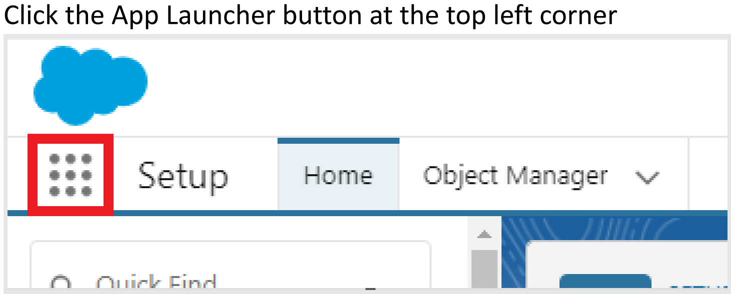
1. Click on the gear button at the top right corner.



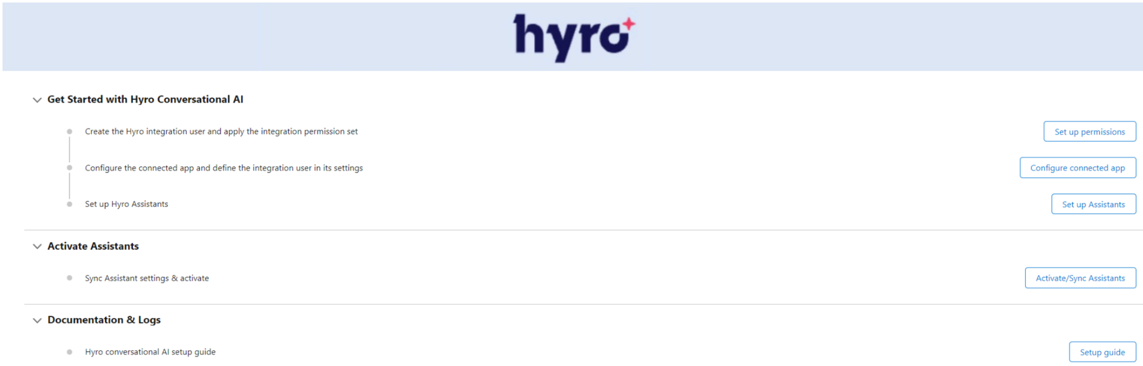
2. Click Setup
3. Type ‘users’ in quick find
4. Select the user you’d like to set up with the admin permissions for the Hyro package
5. Scroll down to Permission Set Assignments and click ‘Edit Assignments’
6. Mark ‘Hyro Admin’ permission and click ‘Add’ button
7. Once the permission set has been added under ‘Enabled Permission Sets’ box, click ‘Save’.

Configuration Page

1. Click the App Launcher button at the top left corner



2. Click ‘View All’
3. search for Hyro and select Hyro admin setup



4. Hyro admin setup includes the following settings:

    a. Permission Sets: Click ‘Set up permissions’ to be redirected to Salesforce setup’s permission sets page. There are 3 Hyro-related permission sets:

        i. Hyro Admin: Provides maximal access to system’s features, including the configuration page itself and the ability to set up new virtual assistants.

        ii. Hyro Analyst: Includes access to the assistant object and insights.

        iii. Hyro Agent: Provides access to the assistants objects only.

        iv. Hyro Integration: Integration user will be used for initiating the assistants, fetching knowledge articles, and querying the Salesforce object model.

        Note: Only 1 user should own the ‘Hyro Integration’ permissions.

    b. Connected App: Click ‘Configure connected app’ to be redirected to Hyro’s connected app page:

        i. On the connected app page, click ‘Edit Policies’

        ii. In the ‘Permitted Users’ dropdown, choose ‘Admin approved users are pre-authorized’.

        iii. Click Save.

        iv. Scroll down to the ‘Profiles’ list and click ‘Manage Profiles’.

        v. Choose the profiles of the Hyro integration user.

    c. Set up Hyro Assistants: Click ‘Setup Assistants’ to be redirected to the assistants’ list view. You can view existing assistants and create new ones. See further information under ‘Create New Assistant’.

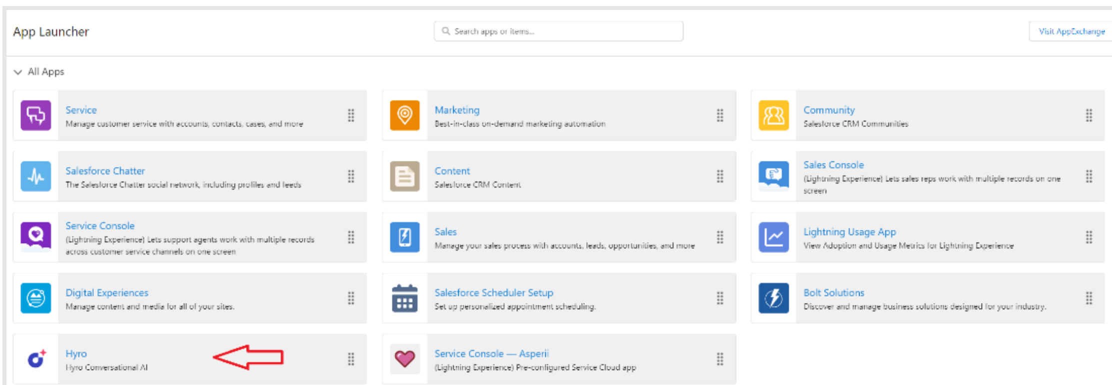
    d. Activate/Sync Assistants: Clicking ‘Activate/Sync Assistants’ will send a callout to Hyro that will update existing assistants that were modified and activate new assistants.

i. After clicking the button, all new assistants’ status will change from ‘Draft’ to ‘Pending’

ii. Sync requests may take up to 48 hours to be completed.

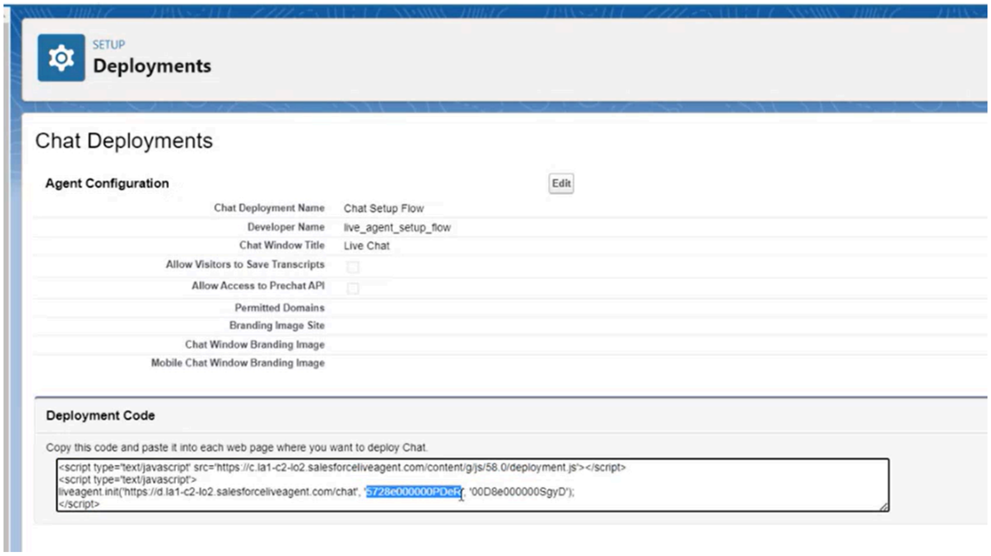
iii. As long as the request is being processed, the button will not be clickable.

iv. As soon as the request is successfully completed, all new assistants’ status will be changed from ‘Pending’ to ‘Active’. If something goes wrong, the status will change to ‘Error’ and an error message will be displayed for each assistant object..

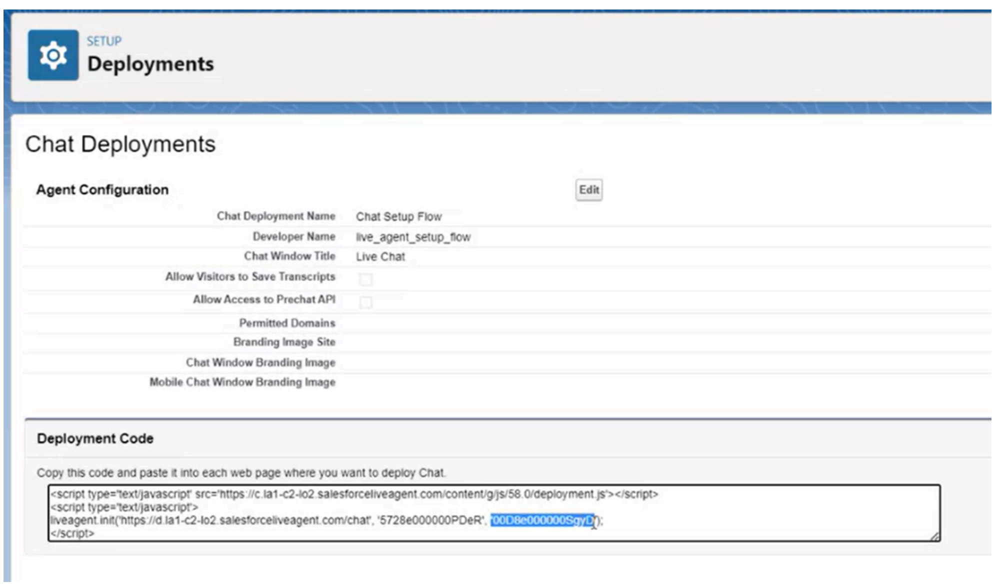


Create New Assistant

1. Go to the assistants’ related list and click ‘New’. Fill in the following fields:
2. <u>Website URL</u>: Insert the website/server URL to which you want to connect the assistant.
3. <u>Knowledge Base</u>: Includes 4 checkboxes identical to the standard checkboxes on the Knowledge Base object. Check the checkboxes you’d like your assistant to refer to when processing Knowledge Base records.
4. <u>Live Agent</u>:
   a. Enable Live Agent: enable live agent functionalities – the assistant will be able to transfer a customer’s request to a live agent in case it wasn’t able to help the customer.
      i. In case checked, the following 3 fields are required.
      ii. To enable live agent, configure in advance Salesforce Omni Channel, enable Salesforce chat, and deploy new chat.
   b. Live Agent URL: Insert the chat API endpoint. You may find the URL in Setup Chat Settings.
   c. Live Agent Deployment Id: Insert the configured chat’s deployment id. You may find it in Setup Deployments



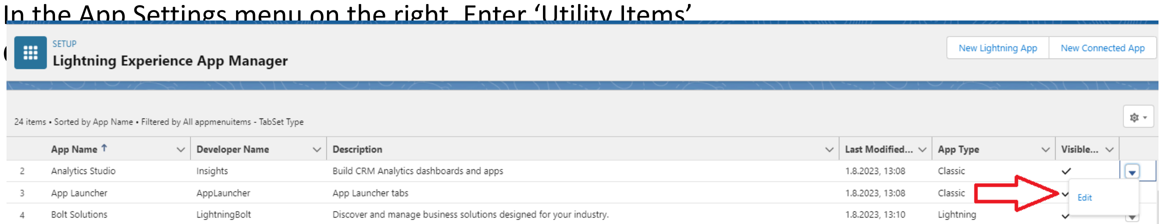
d. Live Agent Button Id: Insert configured button id. This is the id following the deployment id.

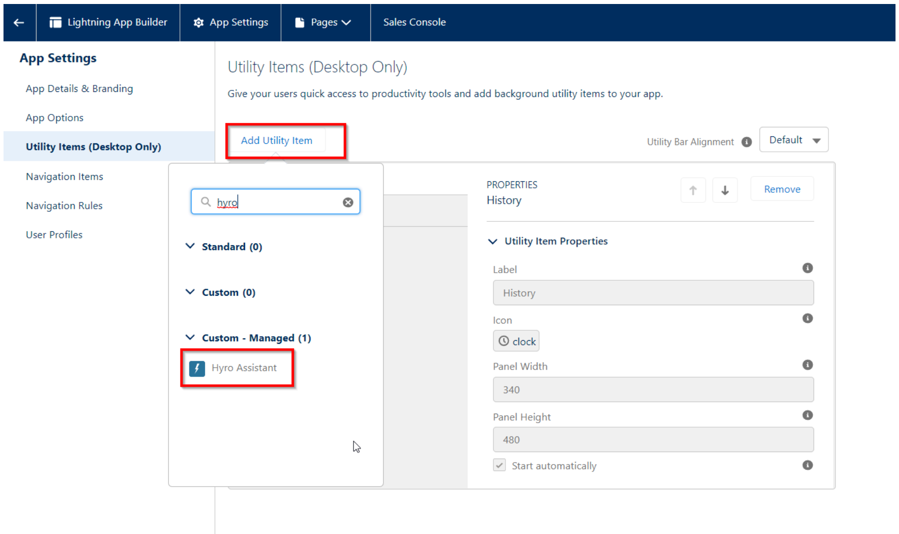


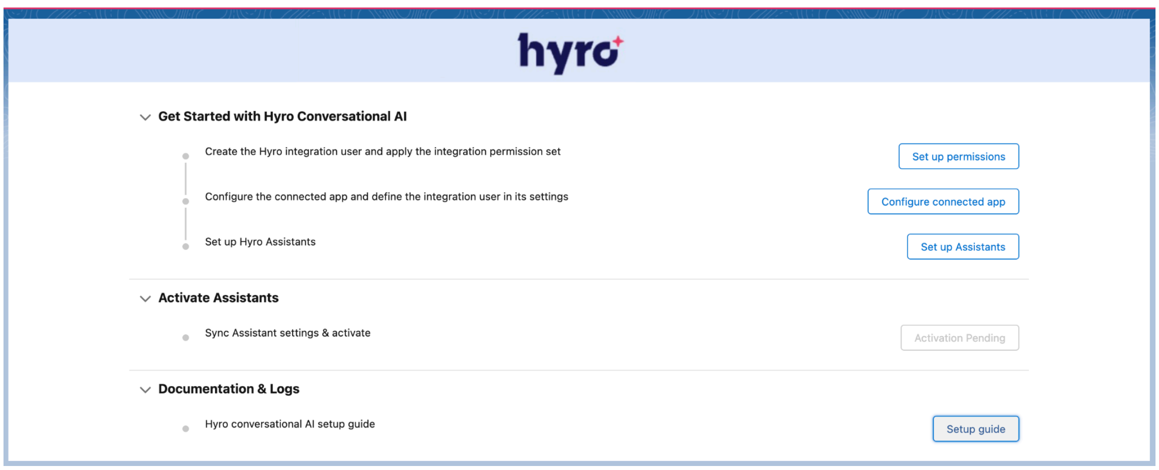
Add Assistant to Utility Bar

Adding Hyro Assistant on your lightning app's utility bar will enable you quick and easy access whenever needed. To do so, follow the next steps:

1. Go to Setup.
2. Type 'App Manager' in quick find.
3. Find your app, and click the 'Edit' button on the app's right dropdown.
4. In the App Settings menu on the right, Enter 'Utility Items'
5. (



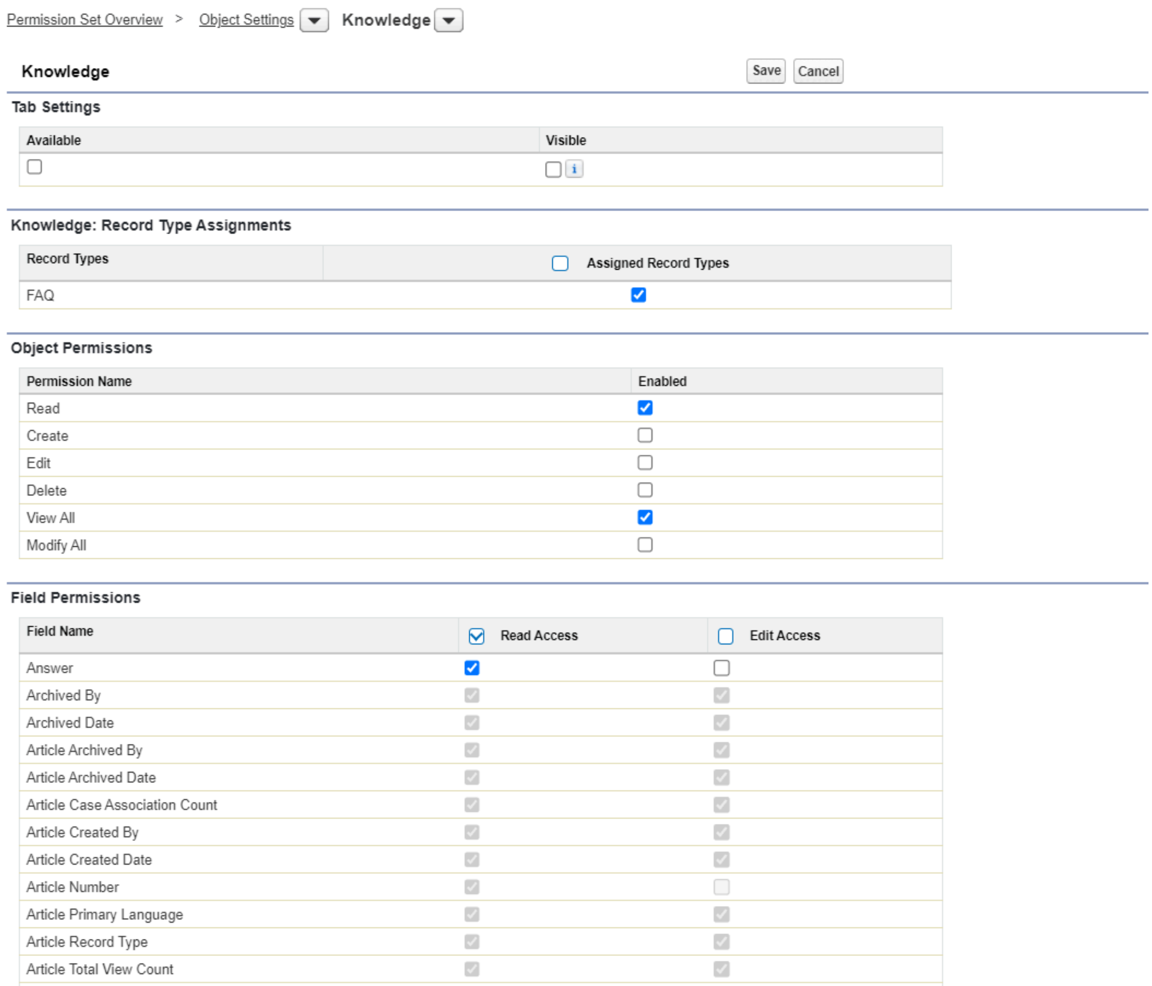




Knowledge Base Setup

- Set Up and Configure Knowledge https://help.salesforce.com/s/articleView?id=sf.knowledge_lightning_set_up.htm&type=5
- For the integration user you have set up, enable read access permissions for the Knowledge object :
    - Enable Read, View all permissions

- Select all fields under Field Permissions | Read Access

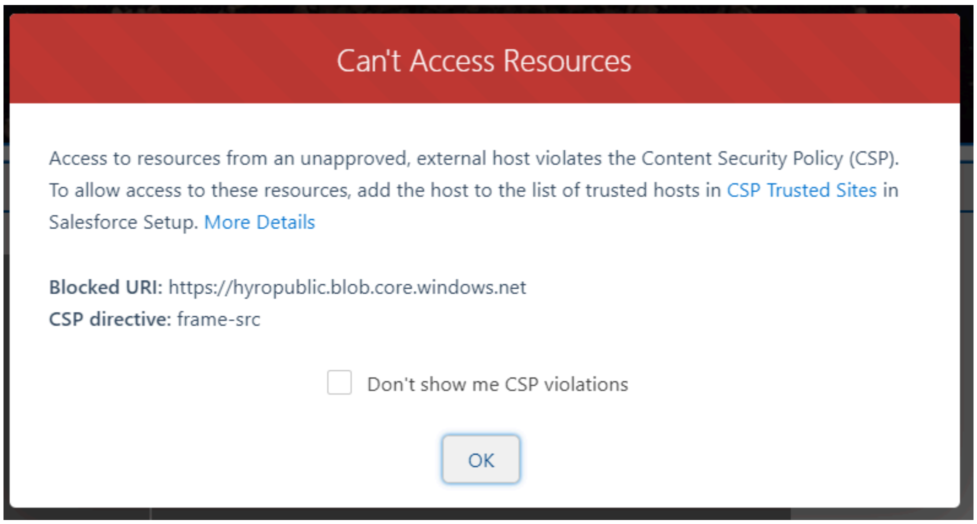


Experience Cloud Setup

Hyro assistant widget is supported also in public and authenticated Experience Cloud sites.

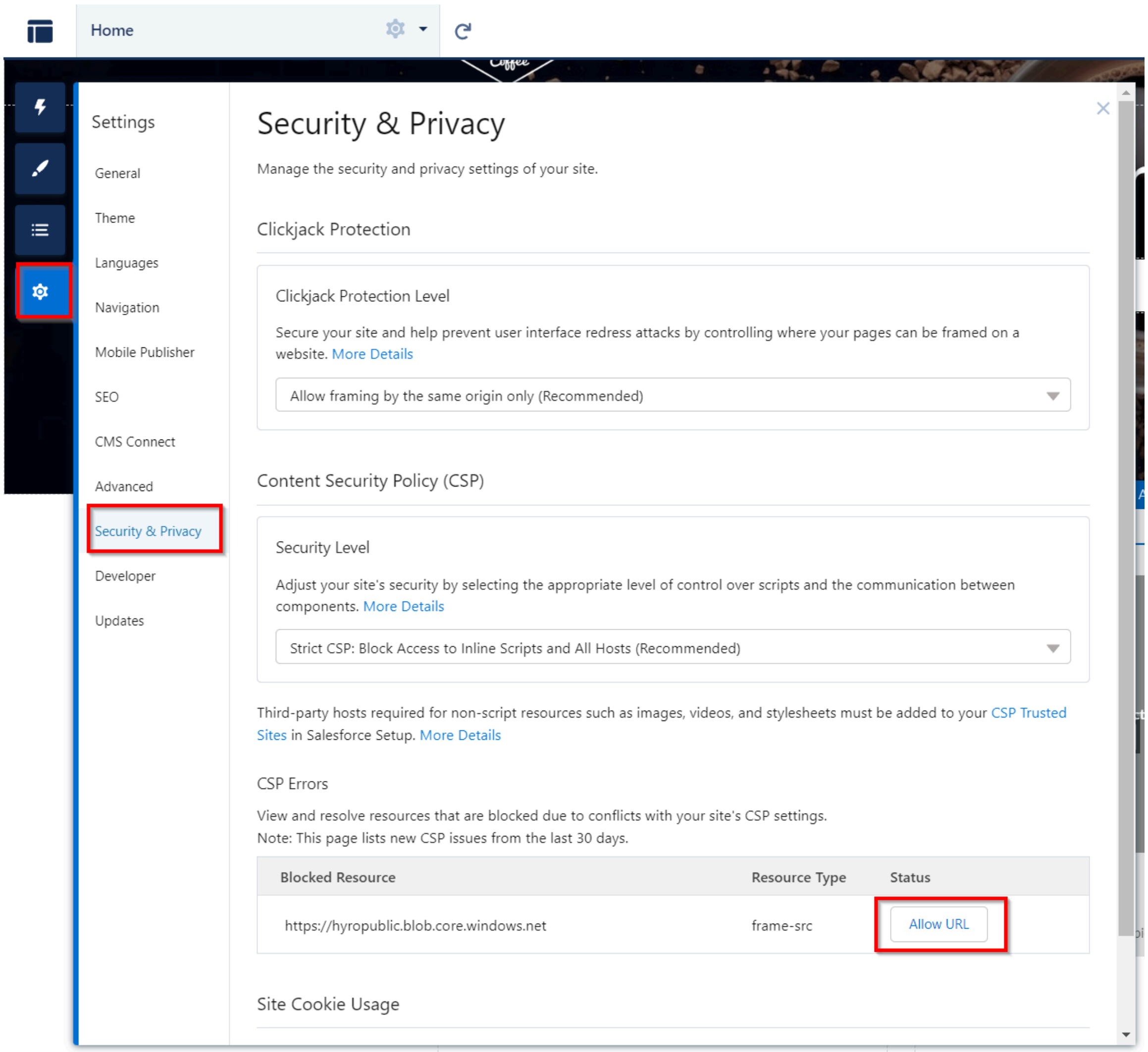
In order to use the Assistant Widget on your site:

1. Navigate to your site builder
2. Open the Components panel
3. Drag the Hyro Assistant component from the Components panel onto an editable area of the page
4. After dragging, if you see a warning of Blocked URI as in the screenshot below, do the following steps (Steps 5-7)

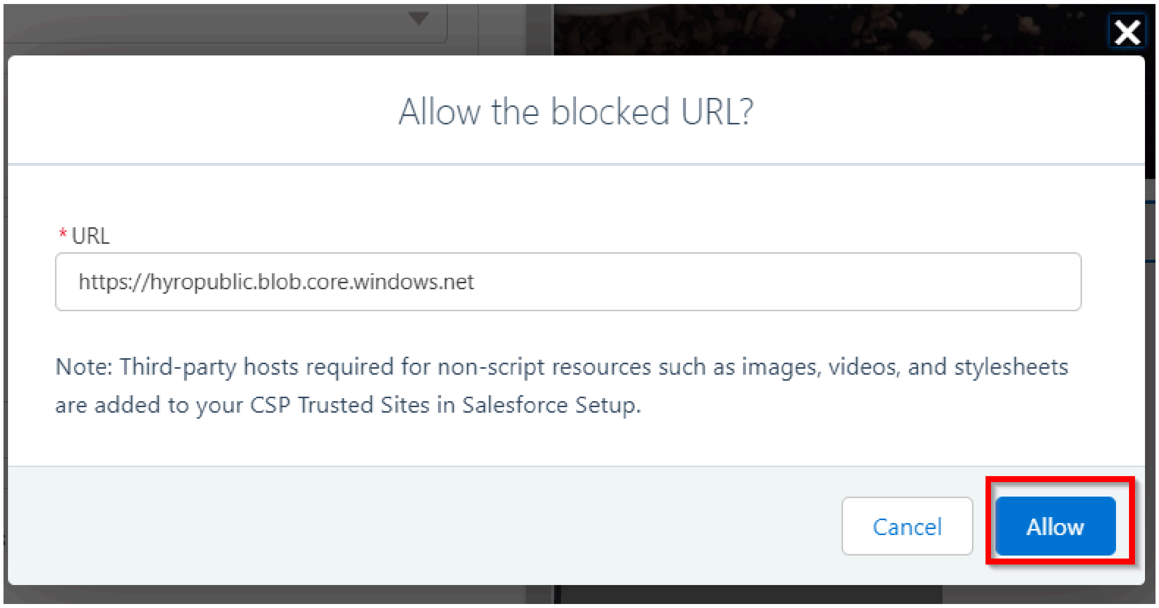


5. In Experience Builder, open Settings | Security & Privacy.

6. Click on Allow URL near the Hyro endpoint



7. Press on Allow button



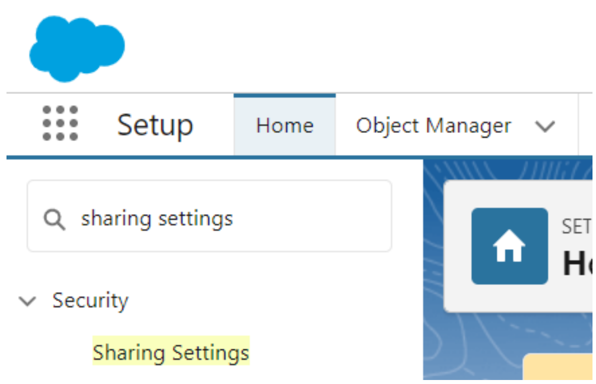
Reference:

1. Edit Pages and Components in Experience Builder - https://help.salesforce.com/s/articleView?id=sf.community_builder_edit_pages.htm&type=5
2. CSP and Lightning Locker in Experience Builder Sites - https://help.salesforce.com/s/articleView?id=sf.networks_security_csp_overview.htm&type=5

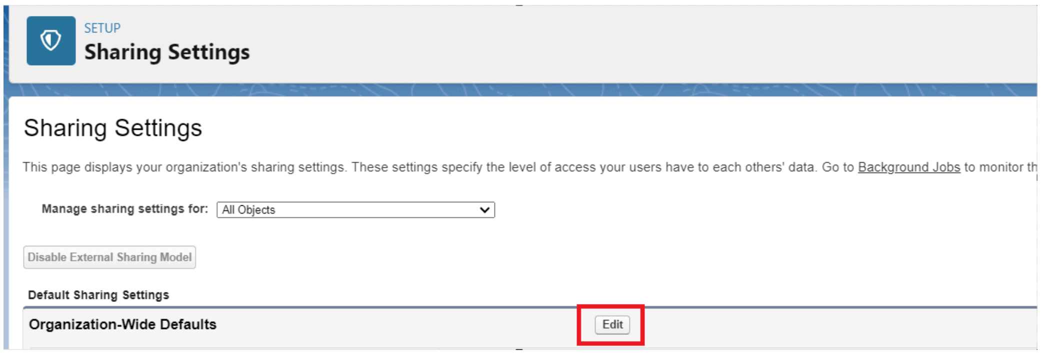
Assistant Sharing Settings

By default, the sharing settings for both web & voice assistants are set to public. In case they need to be set to private, OWD settings must be updated accordingly. In that case, the integration user must be granted with View all/Modify all permissions to both web and voice assistant via custom permission set.

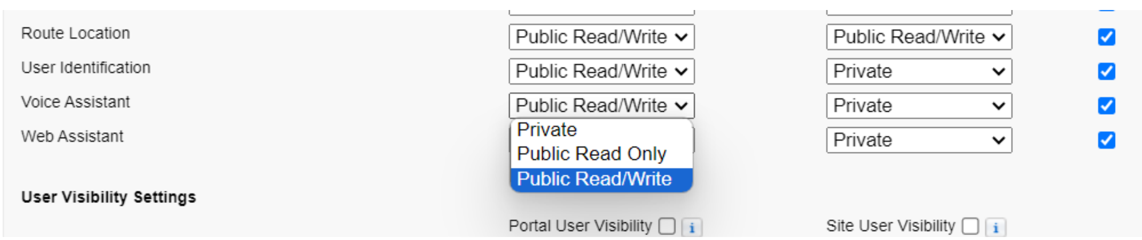
1. To change the OWD settings:
    a. Go to Setup. Type 'Sharing Settings' in quick find box



b. Click ‘Edit’

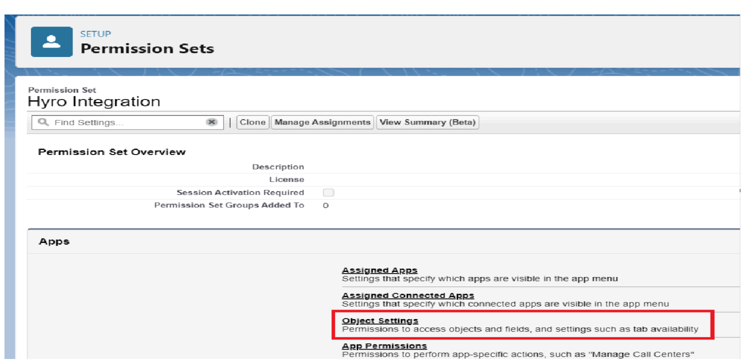


c. Find web & voice assistants. For each, change the default internal access (left column) to Private.



d. Click ‘Save’

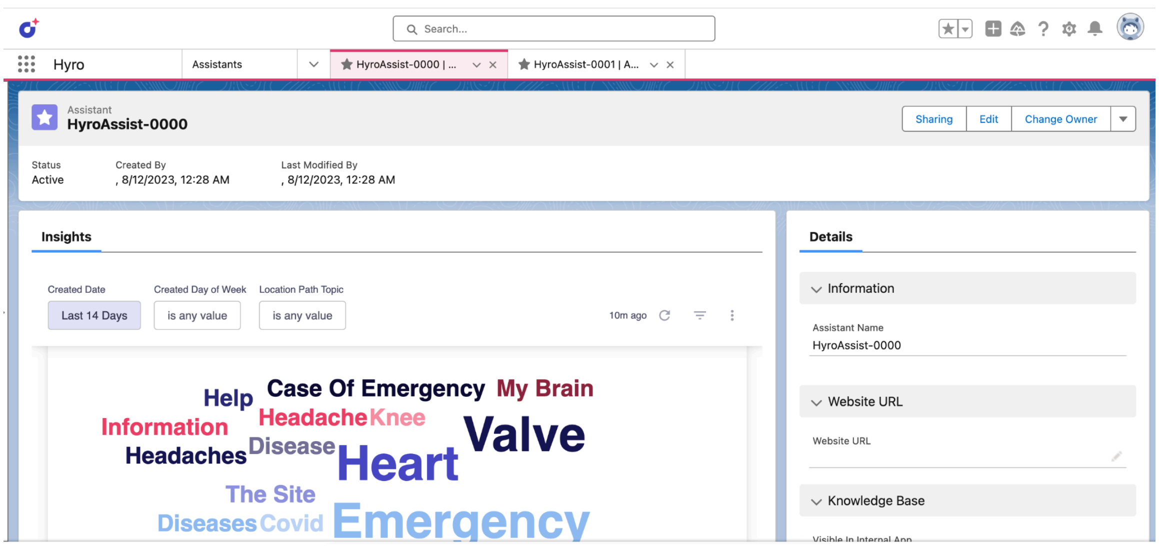
2. To add Read all/Modify all permissions:
   a. Go to Setup. Search and enter ‘Permission Sets’ via quick find box
   b. Click ‘New’
   c. Provide a label and api name to the permission set. Click ‘Save’
   d. Go to ‘Object Settings’

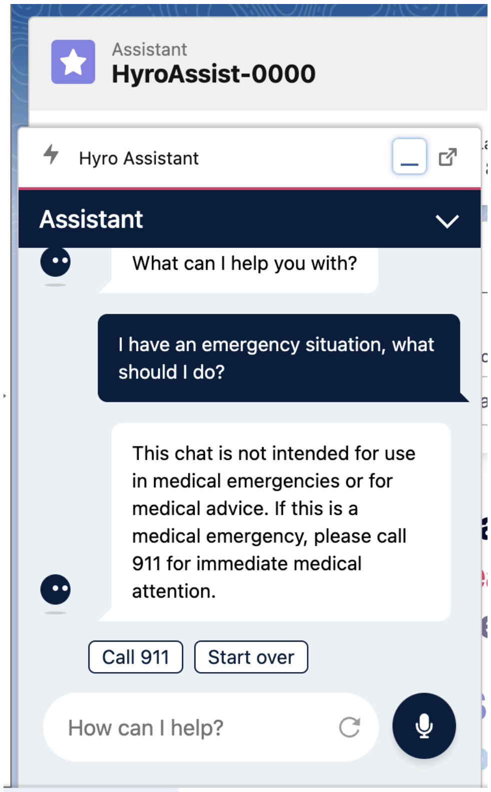


e. Find web & voice assistants. For each, enter and add ‘read all’ and ‘modify all’ permissions

Test the demo assistant

1. Open the Hyro Console App from the Applications Menu
2. Select the Demo assistant HyroAssist-0000 from the list view of assistants
3. Review the Insights Panel as well as the Hyro assistant inside the utility bar on the bottom of the screen.

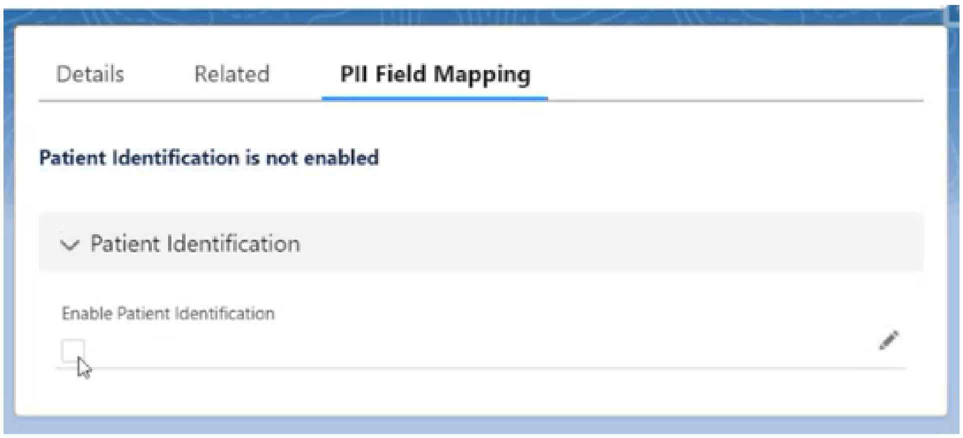



Assistant
HyroAssist-0000
Hyro Assistant
Assistant
What can I help you with?
I have an emergency situation, what should I do?
This chat is not intended for use in medical emergencies or for medical advice. If this is a medical emergency, please call 911 for immediate medical attention.
Call 911
Start over
How can I help?

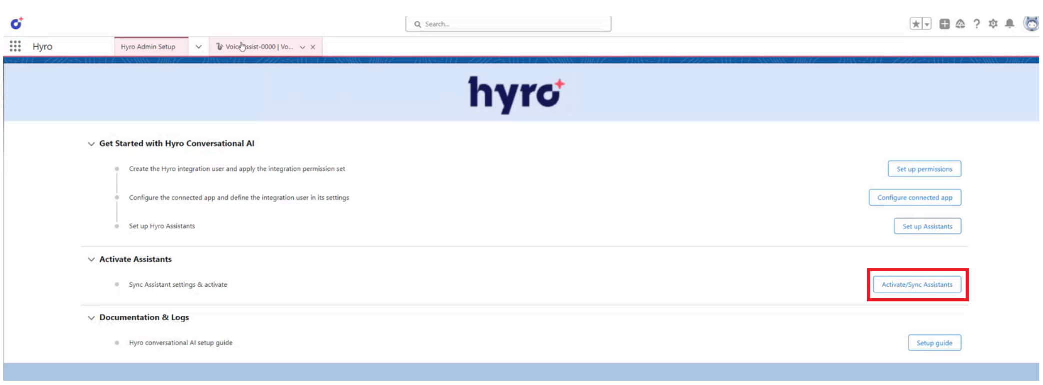
Set PII Field Mapping

When using either voice or web assistant, the patient may go through identification steps. After going through the identification process, the patient's details need to be verified in Salesforce according to the stored data regarding the same patient. To set the relevant Salesforce object and fields that will be used for patient's identification, use the following settings.

1. Go to your voice/web assistant page.
2. Enter the 'PII Field Mapping' tab.



3. Check 'Enable Patient Identification' Checkbox.
4. Fields mapping box will open. This box will include:
    a. Salesforce objects picklist: choose the object to which you'd like to map values to for identification.
    b. PII Properties & Salesforce Fields: for each SII property, you can choose a Salesforce field that will store the property's value.
5. After setting an object and all relevant fields, go to 'Hyro Admin Setup' tab and click 'Activate/Sync Assistants'. This will sync and update your assistant with the field mapping you set.

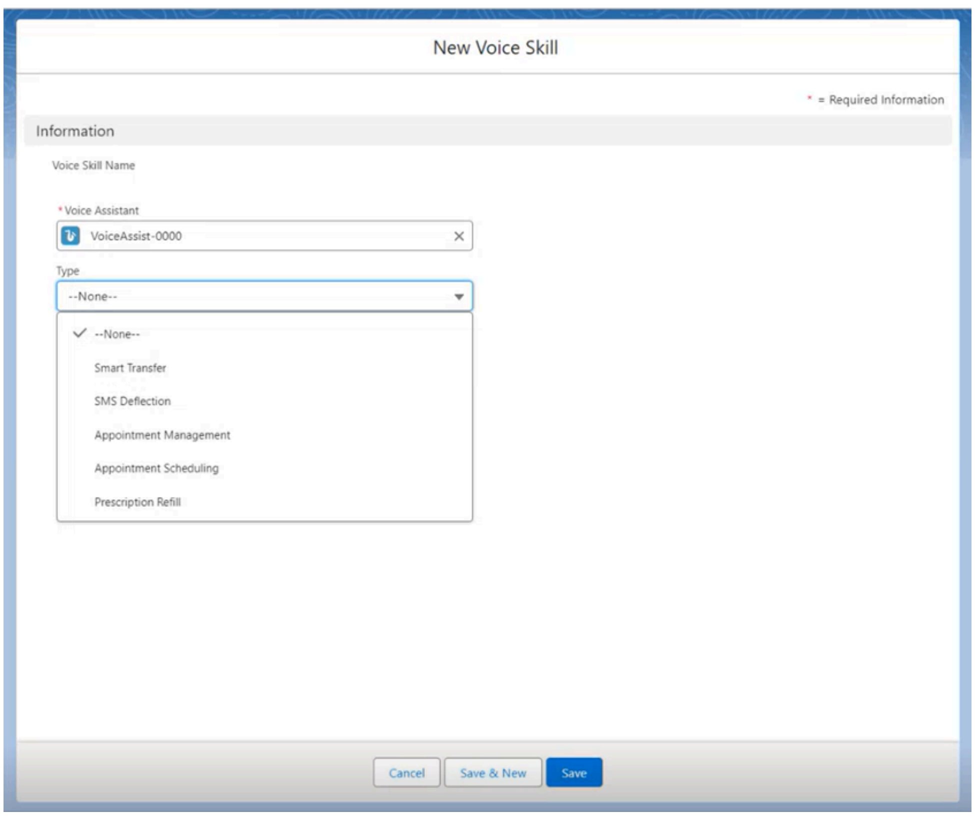


Add Assistant Skills

Different assistants may include different capabilities. Add skills to your assistant to specify what they can do.

1. Under the 'Related' tab, review 'Voice/Web Skills' (according to the type of assistant).
2. If you'd like to add a skill, click the dropdown button to the right side of the list and click 'new'.

3. In the next window, choose the type of skill you want to add. Skill types differentiate between the 2 different assistant types (voice/web).



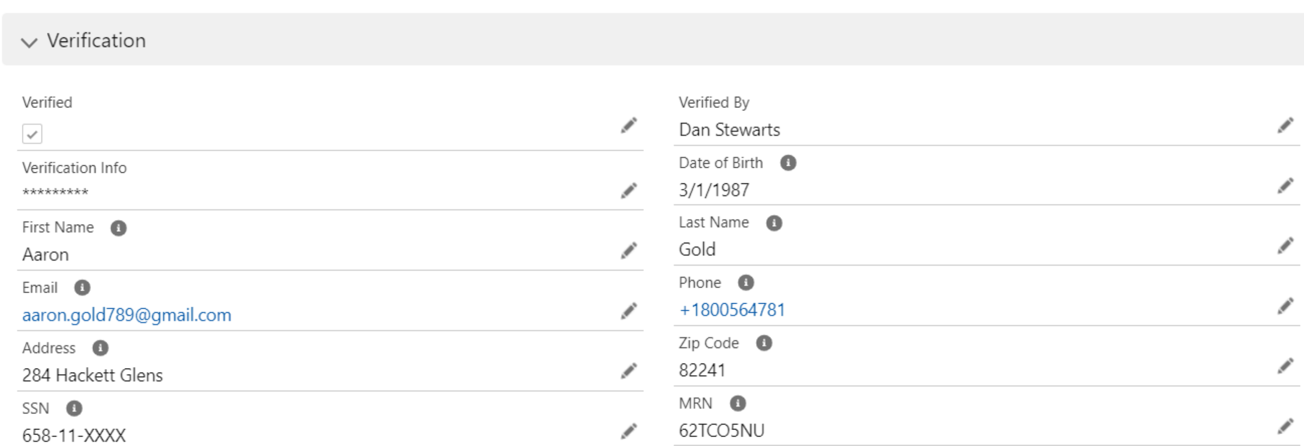
4. To save and sync the changes that were made and apply them to the assistant, go to the 'Hyro Admin Setup' tab and click 'Activate/Sync Assistants'.

Conversation Summaries

When a conversation between an assistant (voice/web) is finished, a conversation summary is automatically generated and received into Salesforce org via inbound integration.

The summary will store the following details regarding the conversation:

1. General Information:
    a. Voice/Web-Assistant: lookup to the assistant that was involved in the conversation.
    b. Provider Name.
    c. Convo Summary.
    d. Agent Transfer: checkbox. Will be 'true' in case the conversation was forwarded to an agent.
2. Verification:
    a. Verified: checkbox. Indicates whether the patient was verified during the conversation.
    b. Verified By
    c. Verification Info: will include the patient's info that was verified. These data will be ciphered.
    d. Date of Birth
    e. First and Last Name
    f. Email
    g. Phone
    h. Address
    i. Zip Code
    j. SSN
    k. MRN



3. Appointment Details:
    a. Appointment Created? (checkbox)
    b. Appointment Verified? (checkbox)
    c. Appointment Rescheduled? (checkbox)
    d. Appointment Start
    e. Appointment Finish
4. User Sentiment: this field describes a general impression of the conversation in terms of the patient's satisfaction: positive, neutral or negative.
5. Knowledge Article Ids: this field stores the ids of the knowledge articles that were shared with the patient during the conversation.
6. Goals Completion: will be represented as a related list, and reflect actions/steps that were taken/achieved in the conversation and are defined as goals, such as: Finding a provider, Appointment scheduling.

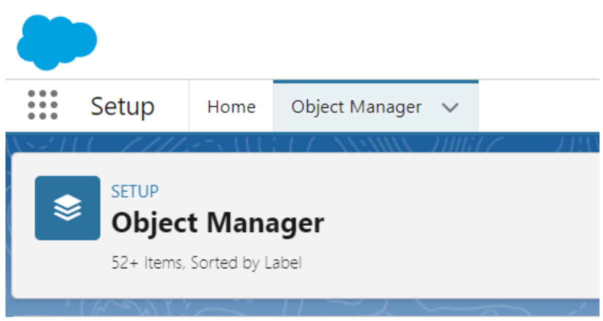
Conversation Summaries can be used not only for data storage, but also for automations. A summary record creation can be used as a trigger for flows, and its values can be used for any automation that might be necessary, based on your business requirements.

For example: If you use Field Service at your org, you can automatically generate a service appointment record in case an appointment was created in the conversation.

Add Conversation Summaries to Cases

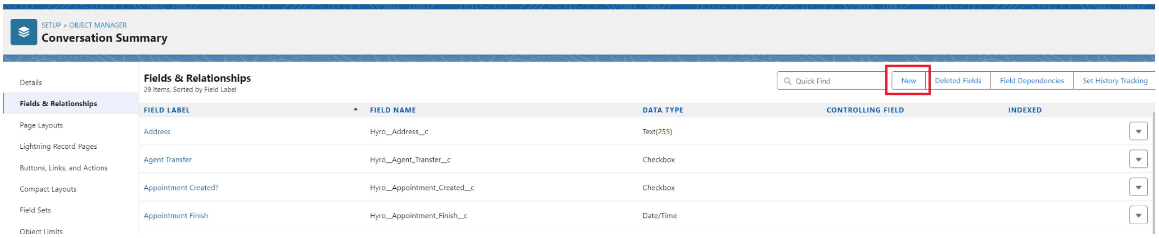
A sample use case that you might be asked to implement, is to link conversation summaries to cases. To do so, follow the below steps:

1. Create a Case lookup field on Conversation Summary object:
    a. Go to Setup > Objects Manager



    b. Search and enter Conversation Summary object

c. Go to Fields and Relationships and click ‘New’



d. Choose field type ‘Lookup Relationship’ and click ‘Next’
e. Choose the object Case from the ‘Related To’ dropdown and click ‘Next’
f. Provide the field a label and an api name. Follow the different settings in the given screen and configure the field according to your specific requirements.
g. Choose the profiles that will have access to the field, and the level of access (read only/edit)
h. Choose the Conversation Summary layouts in which the fields should appear
i. Choose the Case layout in which the related list with the related conversation summaries should appear.
j. Click ‘Save’

2. Create a record-triggered flow, that runs on Conversation Summary creation, and populates the lookup field with the relevant Id according to your requirements.