Knowledge Einstein Article Recommendations

Auto-Response Email Flow Template

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CONTENTS

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

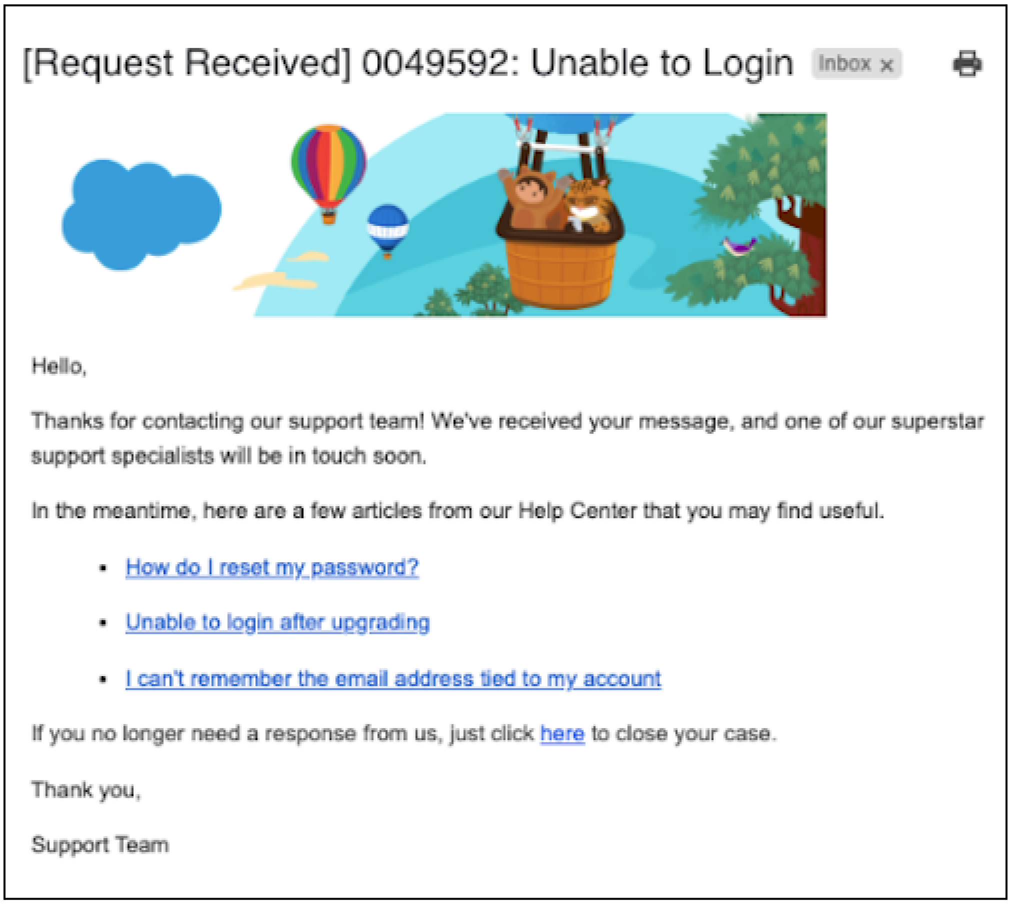
1. From the AppExchange, click **Get it Now**.
2. Choose whether to install in production or a sandbox.
3. Log into your Salesforce org when prompted.
4. Choose **Install for Admins Only**.
5. Click **Install**.
6. Follow the prompts to complete the app installation.

Create and Activate Flows

1. Go to Setup -> Process Automation -> Flows
2. Click on **“Close Case Flow”** to access the Flow Builder
3. Activate it
4. Go back to Setup -> Process Automation -> Flows
5. Click on **“EAR Email Auto-Response Flow”** to access the Flow Builder
6. Follow the steps on the “Mandatory Setup” section of this guide
7. Click on the “Save As” button and give your Flow a Name
8. Activate it

Auto-Response Email Flow

This flow sends an auto-reply with Article recommendations whenever a customer submits a case through email.



[Request Received] 0049592: Unable to Login Inbox x

Hello,

Thanks for contacting our support team! We've received your message, and one of our superstar support specialists will be in touch soon.

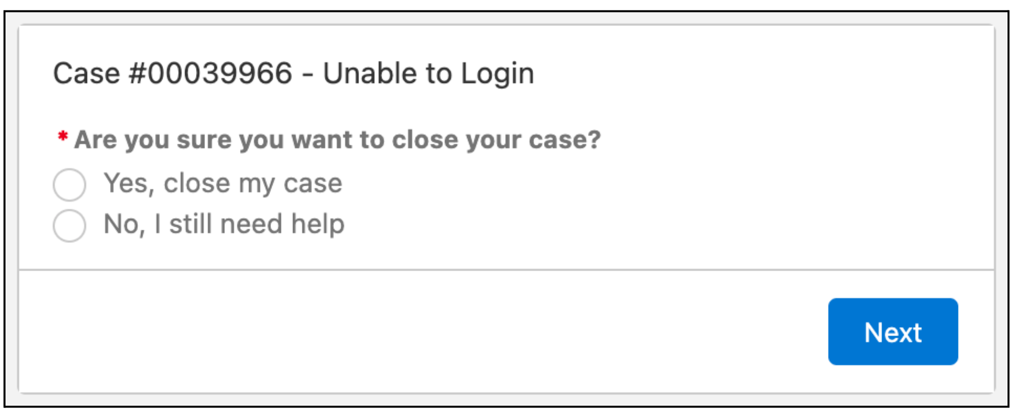
In the meantime, here are a few articles from our Help Center that you may find useful.

- How do I reset my password?
- Unable to login after upgrading
- I can't remember the email address tied to my account

If you no longer need a response from us, just click here to close your case.

Thank you,

Support Team

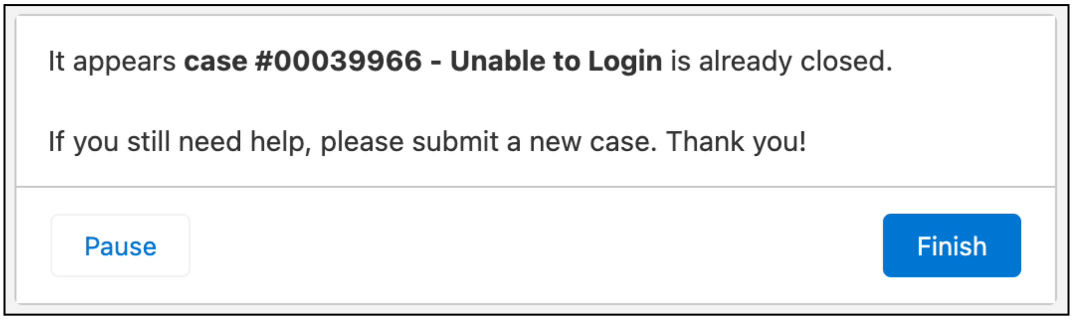


Flow Outcomes

Customers can close their Case from the email, if one of the Articles solved their problem.

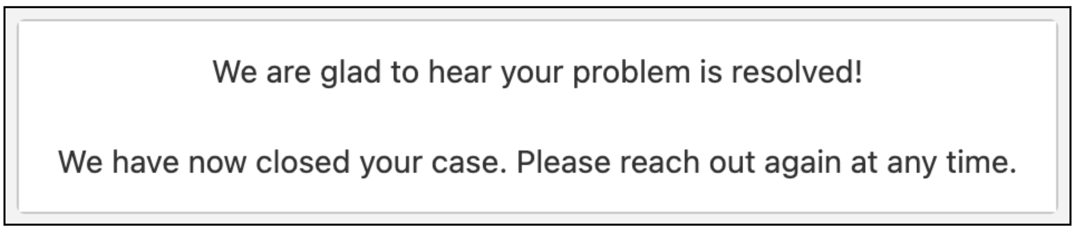
Case has already been closed

If the case is already closed the following message will show:



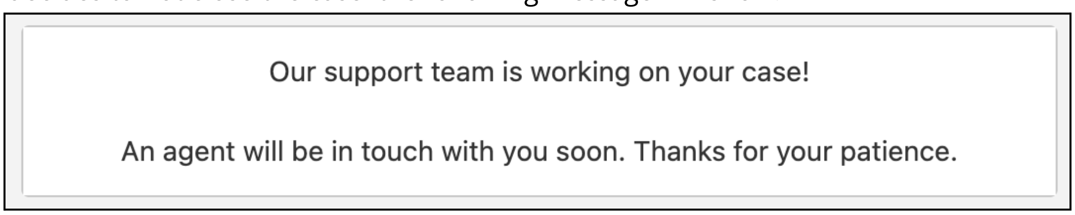
User decides to close the case

If the user decides to close the case the following message will show:

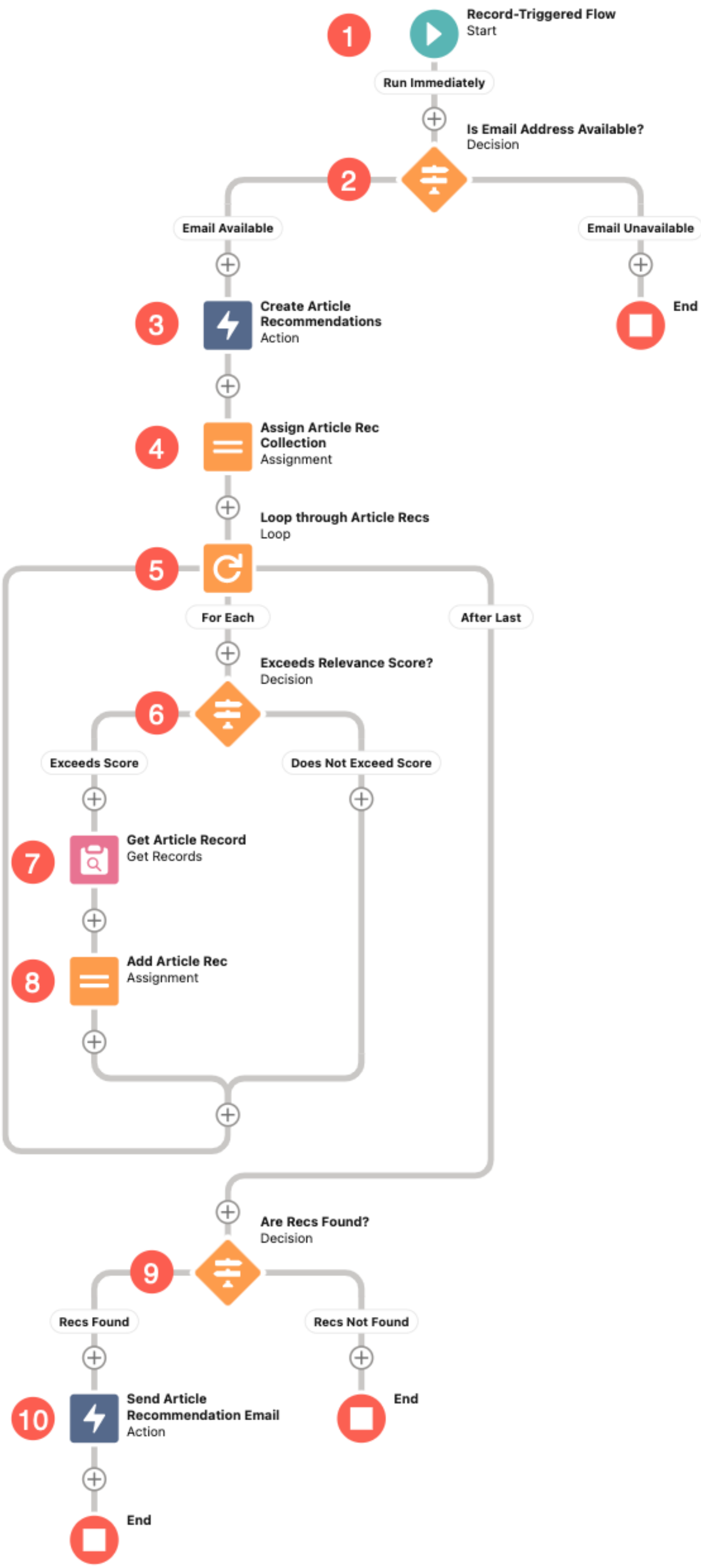


User decides not to close the case

If the user decides to not close the case the following message will show:



Flow Elements



1. **Record-Triggered Flow:** selects the Case record that triggers the flow when it's created and matches the condition that the Origin is from an Email.
2. **Is Email Address Available:** checks if the Case has a Contact Email.
3. **Create Article Recommendations:** takes the Case ID as input and returns a JSON list of recommended articles identified from your active Einstein Article Recommendations model.
4. **Assign Article Rec Collection:** assigns the recommended articles to the "Article_Rec_Collection" variable.
5. **Loop through Article Recs:** iterates over the articles stored in "Article_Rec_Collection"
6. **Exceeds Relevance Score:** checks if the article exceeds a relevance score of 80.
7. **Get Article Record:** If the article exceeds the score, it looks for the Knowledge Object record.
8. **Add Article Rec:** adds article record to the "Recommendation_Text_Template"
9. **Are Recs Found:** checks if there were articles found.
10. **Send Article Recommendation Email:** if there were articles found, it sends an email with the recommended articles.

Mandatory Setup

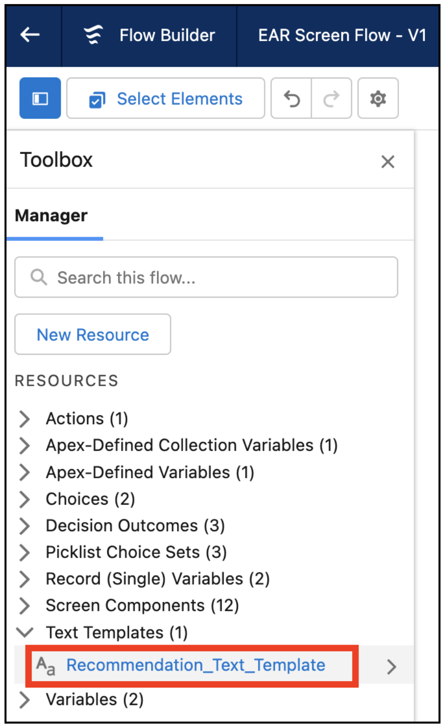
Add a new value to the Case Status picklist field

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.

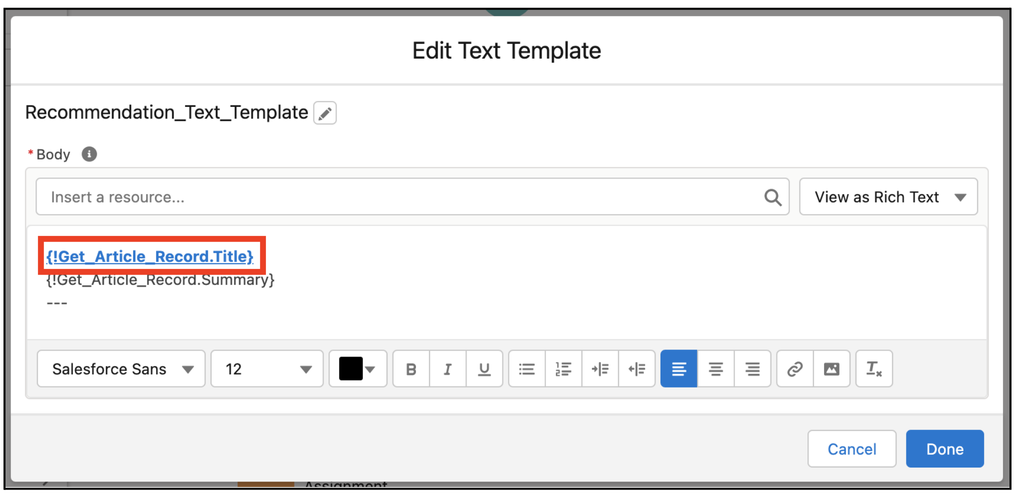
Customize the article hyperlinks to your Experience Cloud site

You'll need to modify the article hyperlinks in the email, so that they forward to your Experience Cloud portal.

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 "**{!Get_Article_Record.Title}**".

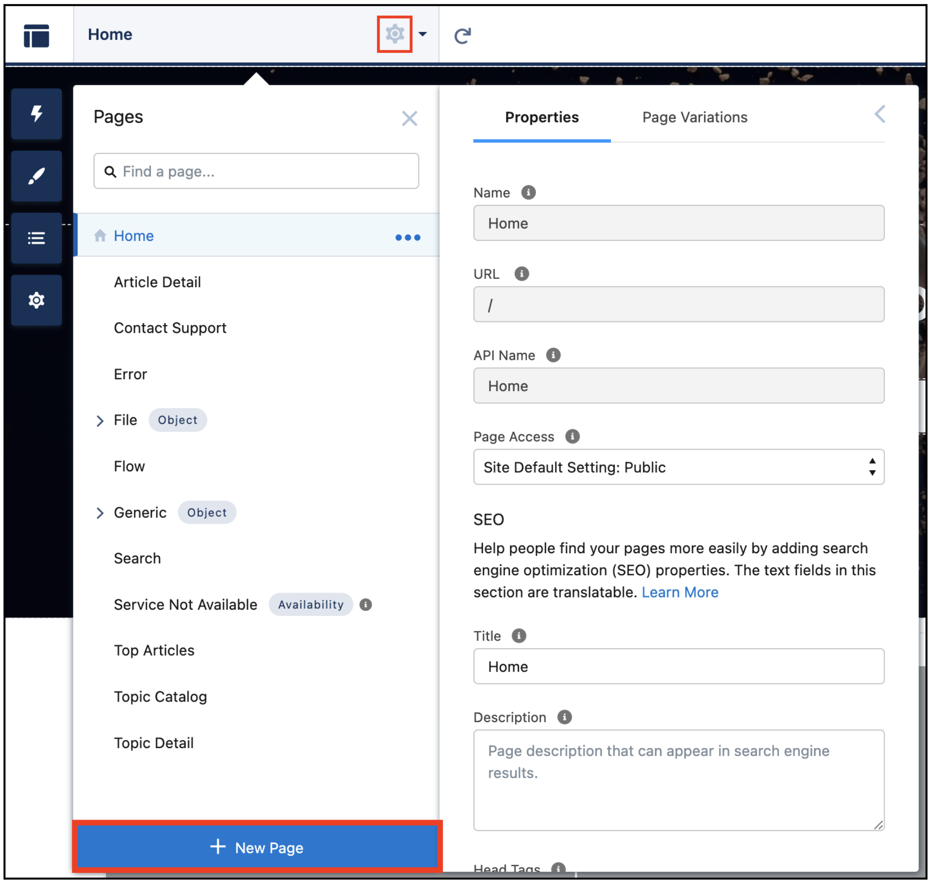


4. In the "Link URL" popup that opens, enter the URL "[https:///mydomain.force.com/customersupport/s/article/{!Get_Article_Record.UrlName}]()" (without quotation marks). Replace "[https:///mydomain.force.com/customersupport/]()" with the base URL of your Experience Cloud site.

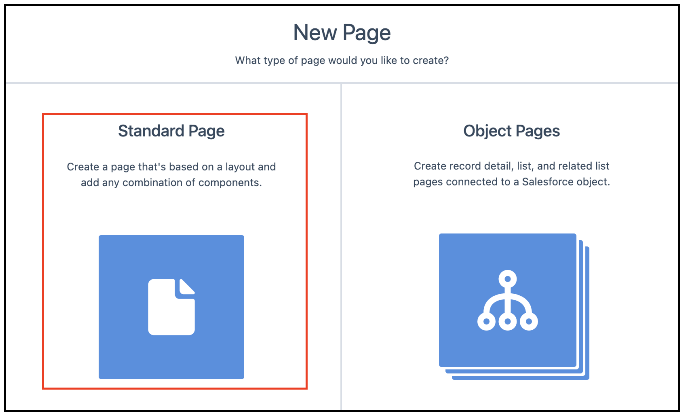
Create a page for the "Close Case" Screen Flow on your Experience Cloud portal

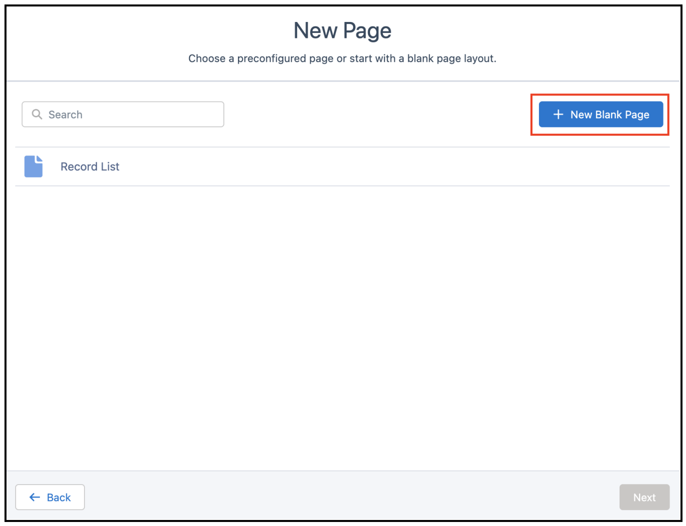
You'll need to create a page on your Experience Builder website, to make the Close Case Flow accessible to customers.

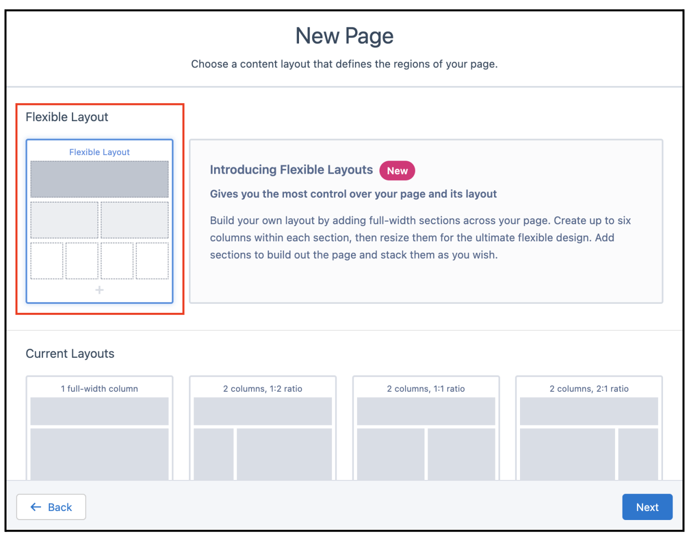
1. Go to Setup -> Feature Settings -> Digital Experiences -> All Sites
2. Look for your self-service website and click 'Builder' to open the Experience Cloud Builder.
3. Click the Gear icon at the top, then click New Page.



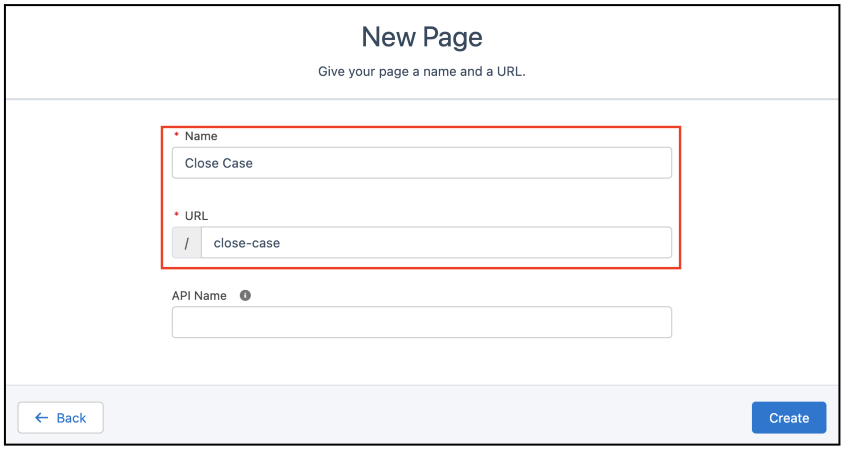
4. Click Standard Page > New Blank Page > choose a layout (we recommend the Flexible Layout, but you can choose any).



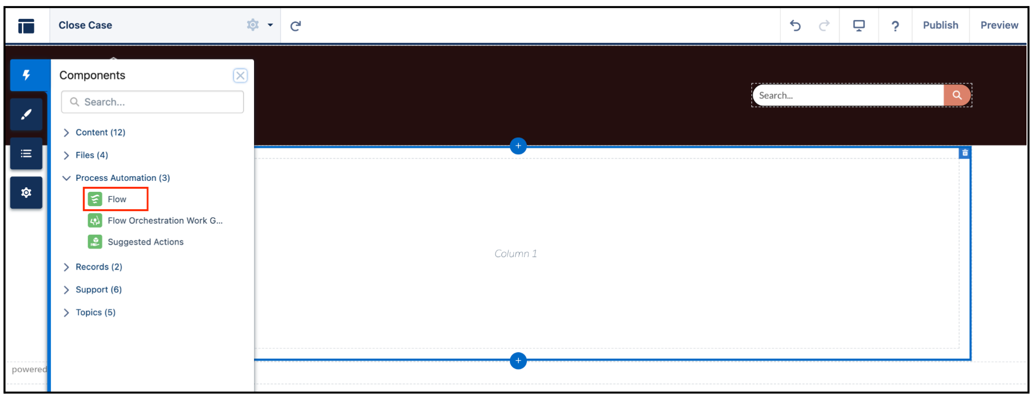


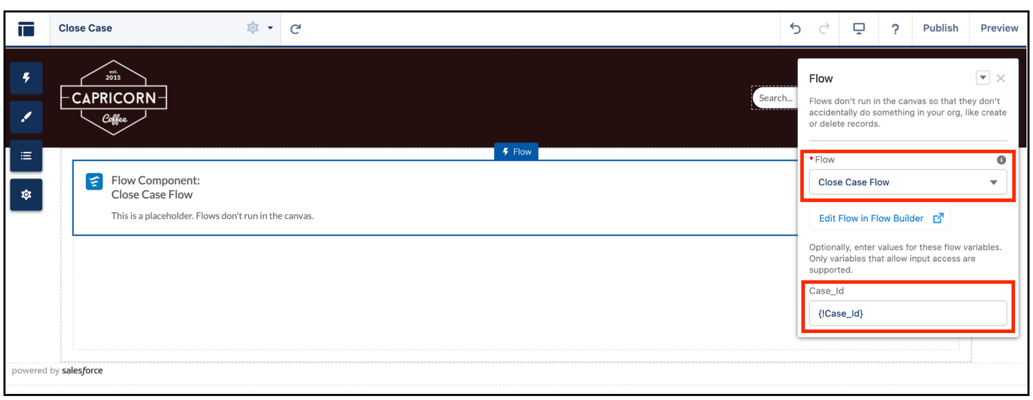


5. Name: “Close Case”.
   Url: “close-case”.



6. From the Components menu on the left, drag the Flow component to your page. Click the Flow component, choose your Close Case Screen Flow and type **{!Case_Id}** as the input variable.



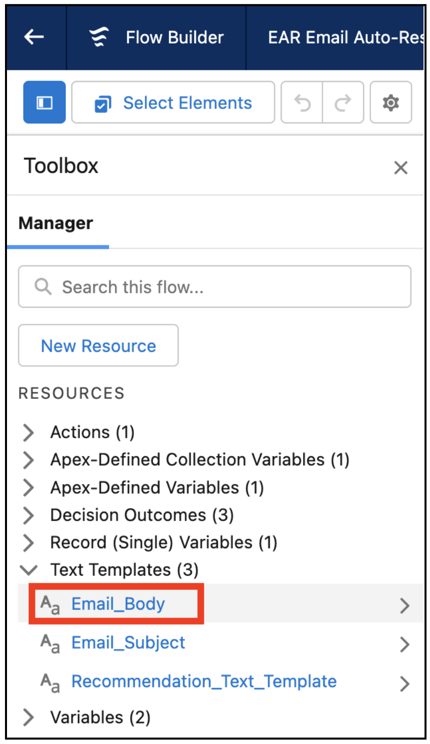


7. Click Publish to publish these changes to your site.

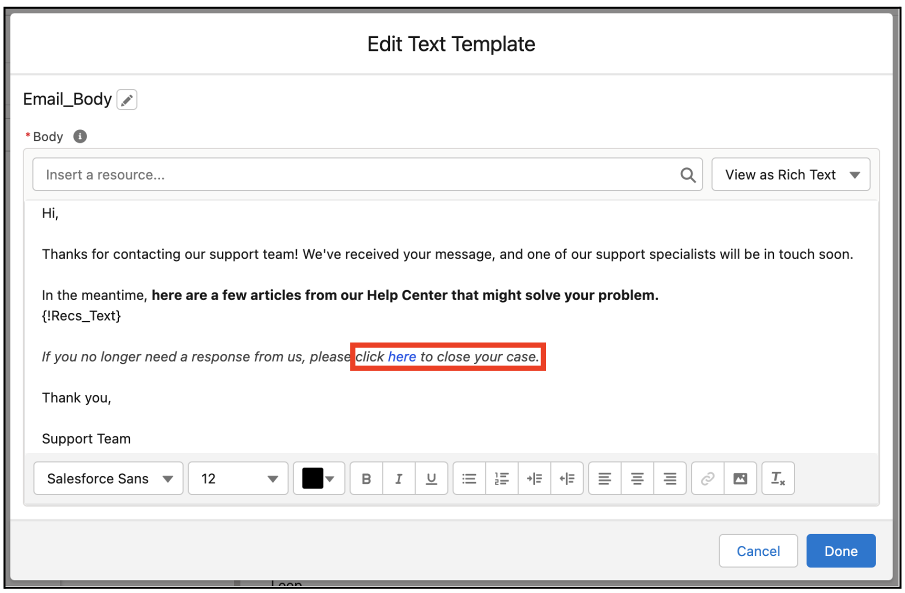
Customize the link to close the case

You'll need to modify the close case hyperlink in the email, so that it forwards to your Experience Cloud portal.

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



3. Double-click on the link that says "here" (in the sentence "click here to close your case").



4. In the "Link URL" popup that opens, enter the URL "https:///mydomain.force.com/customersupport/*s/close-case?Case_Id={!$Record.Id}*" (without quotation marks). Replace "https:///mydomain.force.com/customersupport/" with the base URL of your Experience Cloud site.

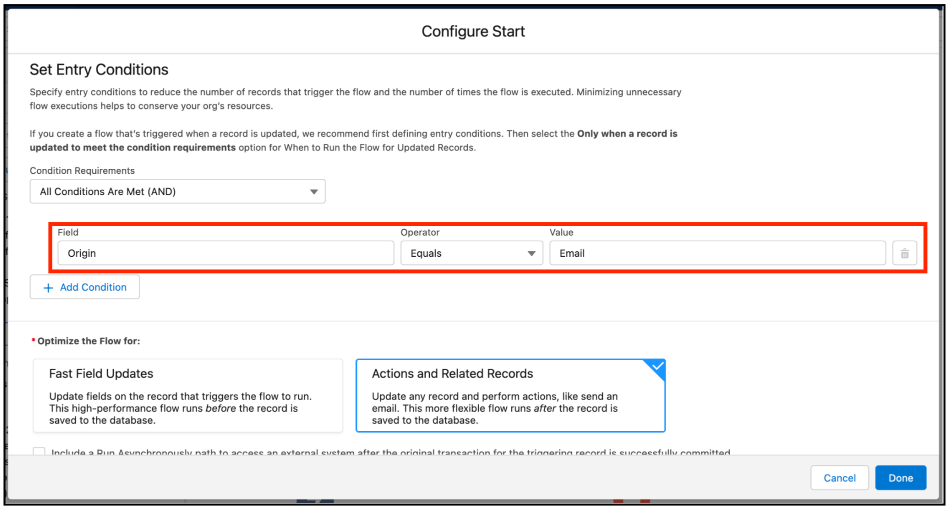
Optional Configuration

Set the entry criteria

By default, the Flow runs only for Cases whose Origin equals "Email". To change this:

1. Click on the Start element.

2. Modify the entry criteria to meet the needs and customizations of your business.



Customize the body of the email

You can modify the body of the auto-response email by

1. Going to the Resource Manager on the left hand side.
2. Editing the "Email_Body" variable.

Customize the subject of the email

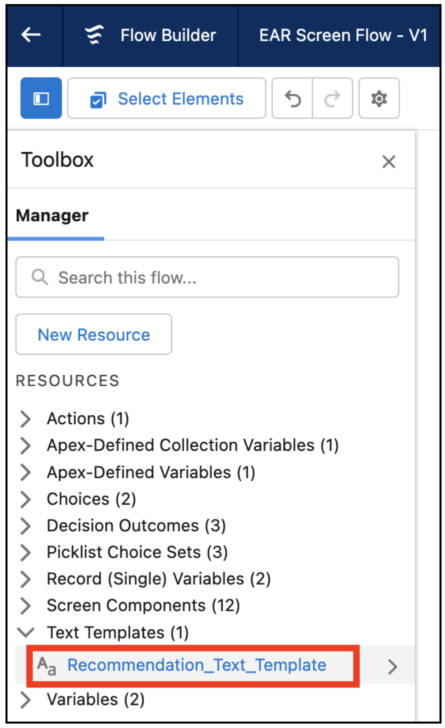
You can modify the body of the auto-response email by

1. Going to the Resource Manager on the left hand side.
2. Editing the "Email_Subject" variable.

Customize the template for article recommendations

In the Resource Manager panel on the left hand side, you can change the "Recommendation_Text_Template" variable to 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.



Frequently Asked Questions

The Auto-Response Email is not being delivered to the recipient

If the email is not being delivered to the recipient, go to **Setup -> Email -> Deliverability** and make sure that the Access Level **"All Email"** is selected.

The Article Links on the Email are redirecting to the Experience Cloud Login Page

If the Article Recommendation Links on the Email are redirecting to the Experience Cloud Login Page instead of showing the article, make sure that the Guest User Profile has access to the Article's Data Category.

1. Go to Setup -> Feature Settings -> Digital Experiences -> All Sites
2. Look for your self-service website and click 'Builder' to open the Experience Cloud Builder
3. Go to Settings -> General and click on the Guest User profile link
4. Scroll down until you find the Category Group Visibility Settings section
5. Click Edit next to the Article's Category Group
6. Under Category Group Visibility select the option "All Categories"

The Guest User can’t view the Close Case Flow

If the Close Case Page on the Experience Cloud site is not showing the flow, you must enable the “Run Flows” permission on the Guest User profile.

1. Go to Setup -> Feature Settings -> Digital Experiences -> All Sites
2. Look for your self-service website and click ‘Builder’ to open the Experience Cloud Builder
3. Go to Settings -> General and click on the Guest User profile link
4. Scroll down until you find the General User Permissions section
5. Enable the “Run Flows” checkbox and save

Application Changelog

[1.0] - 2023-01-10

- First version of the package