Transportation & Logistics Supplyforce Bot Quick Start Guide

Salesforce, Spring ’20

Last updated: May 1, 2020

Introducing the Supplyforce Bot

The Transportation & Logistics Supplyforce Bot is here to help you stay engaged with your fleet from “hire-to-retire”. This solution will allow you to provide your company’s fleet with a channel to communicate with your staff by using a simple text-based UI.

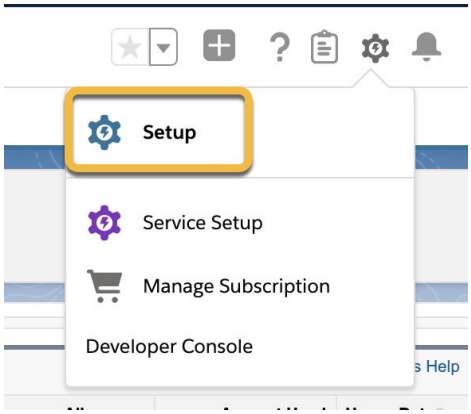
What You Get with the Supplyforce Bot

When you install the Supplyforce Bot, you get a package containing a preconfigured Einstein Bot ready to assist your users! The bot come preloaded with the ability to deflect cases by providing information to users, report absences, issues with their route and/or are able connect them with live support agents. The bot dialogs come pre-configured and ready to use, but you can also improve your employees’ experience by customizing the dialogs to your own business.

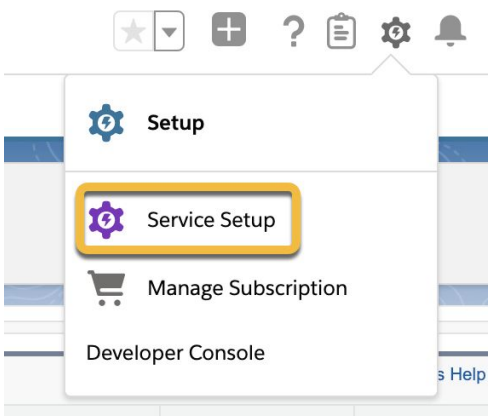
Getting to Know Setup

To set up your Supplyforce Bot, you navigate certain areas of Salesforce. We tell you how to navigate to each part as we guide you through configuration. Here are some other pointers to help orient you in the org.

- Salesforce Setup: Set up the generic settings for all of Salesforce, including adding users who can access the various parts of the org.



- Service Setup: Set up everything you need for the Salesforce Service Cloud offering. Service Cloud is the customer service and support application that you can customize to fit your needs.



Different Roles Accessing Your Salesforce Org

Various roles play a part to set up your Salesforce org and help with driver cases:

Salesforce Admin: While this guide will provide you with the basics to get your company up-and-running with the Supplyforce bot package, you'll want to make sure that you have an admin involved with the installation and configuration.

Manager: This person will be viewing reports on open cases, and will oversee how support agents are interacting with users.

Support Agent: The support agent will be on the frontlines to field and answer questions from your employees/drivers.

Employees/Couriers/Drivers: These are your primary end-users who will be interacting with the bot and creating cases. You'll want to make sure that you have their contact information uploaded correctly so they can take advantage of the service.

Configure General Org Settings

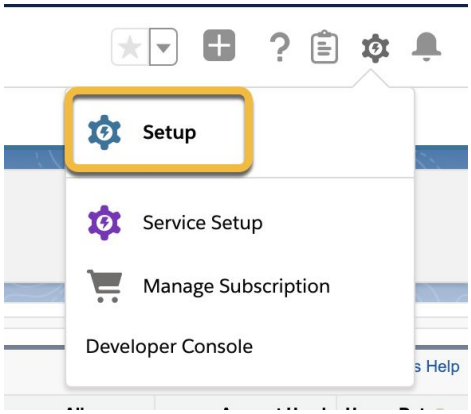
Configure My Domain

You may need to set up My Domain in your org (if you haven't already). With My Domain, you can:

- Use Lightning components in Lightning component tabs, Lightning pages, the Lightning App Builder, or standalone apps
- Better manage login and authentication
- Work in multiple Salesforce orgs at the same time
- Let users log in using a social account, like Google and Facebook, from the login page
- Use Identity features for single sign-on. My Domain is required to:
    - Enable users to single sign-on into a Salesforce org
    - Use a Salesforce org as an identity provider for single sign-on into third-party applications or other Salesforce orgs
- Allow users to log in once to access external services

Here is a quick Setup Guide for setting up My Domain in your org:

1. Navigate to Setup.



2. From Setup, enter My Domain in the Quick Find box, then select **My Domain**.
3. Enter the name for your subdomain.
4. Click **Check Availability**. Salesforce checks whether this domain name is already in use.
5. When availability is confirmed, click **Register Domain**.
6. Click the link to the subdomain once it's ready.
7. From Setup, return to **My Domain** and click **Deploy to Users.**

Also, a great way to learn is by doing. Check out Trailhead to learn about setting up My Domain here.

Create and Edit Content for Drivers

Content in Salesforce Knowledge

In order for your Drivers to be able to search and read Knowledge articles using the Bot, you will need to create content in Salesforce Knowledge. As a general rule, create content such as blogs, announcements, and news articles in Salesforce CMS. Create help articles such as FAQs and how-to's in Salesforce Knowledge.

Create or Edit Content in Salesforce Knowledge

Create FAQs and other help documentation in Salesforce Knowledge.

Knowledge Resources:

- Salesforce Help
  Salesforce Knowledge
  Set Up and Configure Lightning Knowledge
- Trailhead:
  Knowledge Basics (Lightning)
  Set Up Salesforce Knowledge
  Build a Community with Knowledge and Chat

1. Access Knowledge from the app launcher.
2. Click **New**
3. Enter a Title, Summary, Details, and populate any other fields needed.
    a. The Summary field is important because that is the field that is sent to the Driver through the Bot. Consider adding the URL of the article to the Summary field also, so the Driver has the option to view the entire article for more details.
    b. Under Channels, select the following visibility options:
        i. Visible in Internal App displays the article to your employees.
    c. Optionally, to deliver a Knowledge article through Chat or Messaging, you may create a custom field called Chat Answer. You can also provide a short version of the article, a link to the article, or both in that custom field.
    d. The URL Name is populated based on the Knowledge article title. For search engine optimization, don't change the URL Name.
4. Click **Save**
5. Now Publish the article by clicking **Publish.**

6. Once you have Published Articles, from the dropdown menu, select Published Articles to see which articles are already published in the org. Edit or delete these articles based on your company's needs.
7. To edit an article, select the article to edit and click **Edit as Draft**.
8. Click **Edit as Draft**.
9. Edit the content as needed.
10. Click **Save**.
11. Click **Publish** and then **Publish** again.
12. Optionally, you may create an App called Knowledge Management using the App Manager in Setup. This can be the default app for your Knowledge creators.

Translated Knowledge Articles

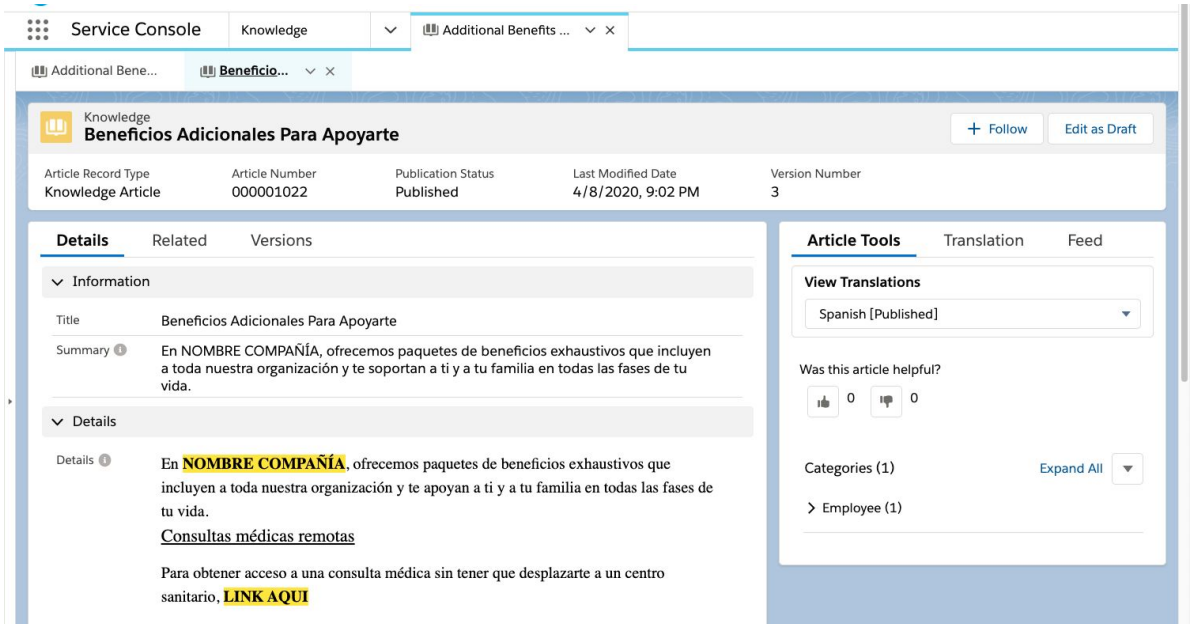
If you signed up for your org after April 10, your Lightning Knowledge page layouts are already set up to optimize for translation, and you have translated versions of some articles in your org. You can find translated articles in German, French, Italian, Dutch, and Spanish. If you signed up for your org before April 10, and would like to have translation options on your Lightning Knowledge pages, you need to add some actions and tabs to your Lightning Knowledge page layout.

Mobile & Lightning Actions to add to your Knowledge Article layout:

- Assign
- Submit for Approval
- Delete Article
- Submit for Translation

You can also create a Lightning Record Page for Knowledge, with tabs for Article Tools and Translations.

Here's what it looks like:



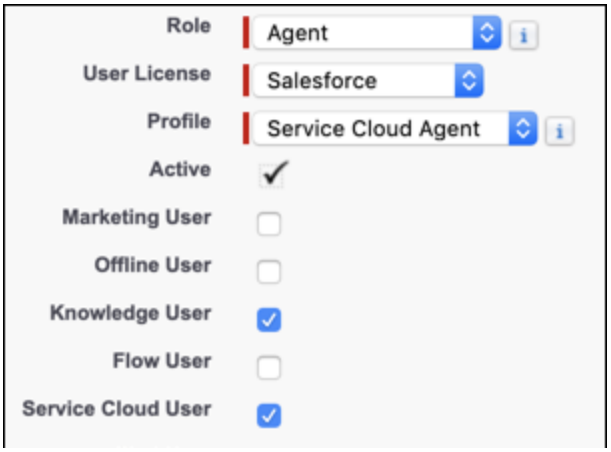
Set Up Service Cloud Features for your Supplyforce Bot

Set Up Your Agents in Your Own Org:

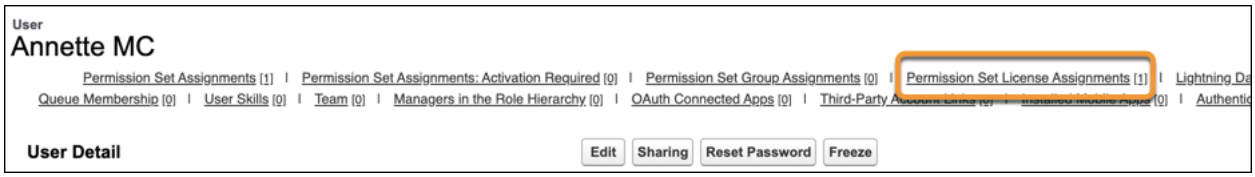
Add the Driver Managers/people who use the Salesforce Service Console to support your drivers.

1. From Setup, in the Quick Find box, enter Users, and then select **Users**.
2. Click **New User** to add a single user or click **Multiple Users** to add up to 10 users at a time.

3. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.
   IMPORTANT: The username must be unique across all Salesforce orgs. The username must be in the format of an email address, for example, jane@salesforce.com. The email used for your username doesn't have to function.
4. Select the following settings:
   - For Role, select a role that makes sense based on your current implementation.
   - For User License, select Salesforce.
   - For Profile, select Service Cloud Agent or a profile that makes sense based on your current implementation.
     Resource: User Management, Profiles
   - Select Knowledge User and Service Cloud User.

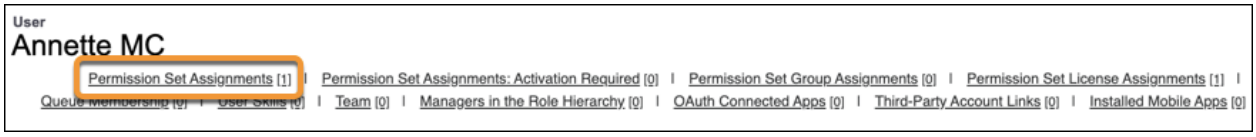


5. To email a login name and temporary password to each new user, select **Generate new password and notify user immediately**.
6. Click **Save & New** and repeat these steps for each user.
7. Select each user in turn and click Permission Set License Assignments. Then click **Edit Assignments**.



Select **Messaging User**. (If you can't find it, do a quick search for it in your browser.)

8. Select each user in turn and select Permission Set Assignments. Then click **Edit Assignments**.



Select **LiveMessage Lightning**

9. From Setup in the Quick Find box, enter Queues, and then select **Queues**. Queues are used to help organize work. Look at your available queues and decide how to organize your agent teams. If you do not have queues setup, reference [how to setup and create queues](#).

10. Edit each queue in turn and add your agents to the appropriate queues.

Additional resources for setuping agents:
[User Management Trails](#)
[Salesforce Help: User Management](#)
[Salesforce Help: View and Manager Users](#)
[User Engagement](#)

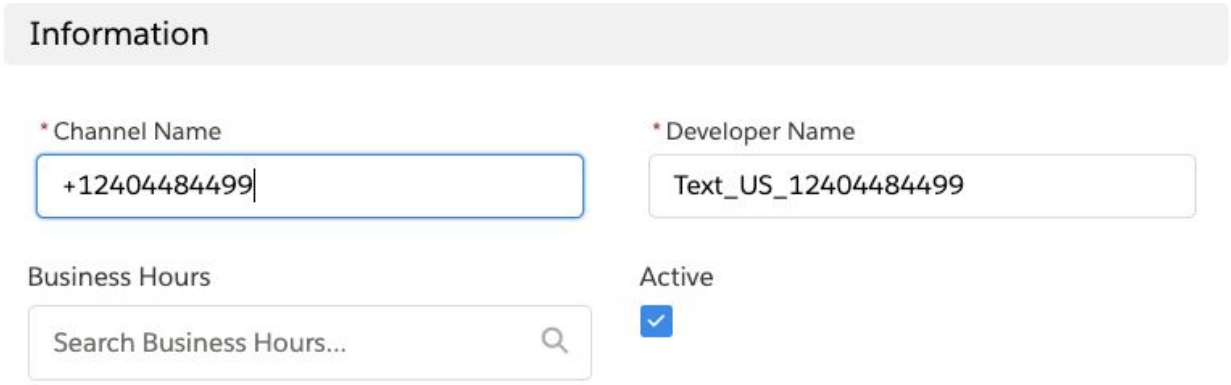
Set Up Messaging

Set up a messaging channel to support your drivers.

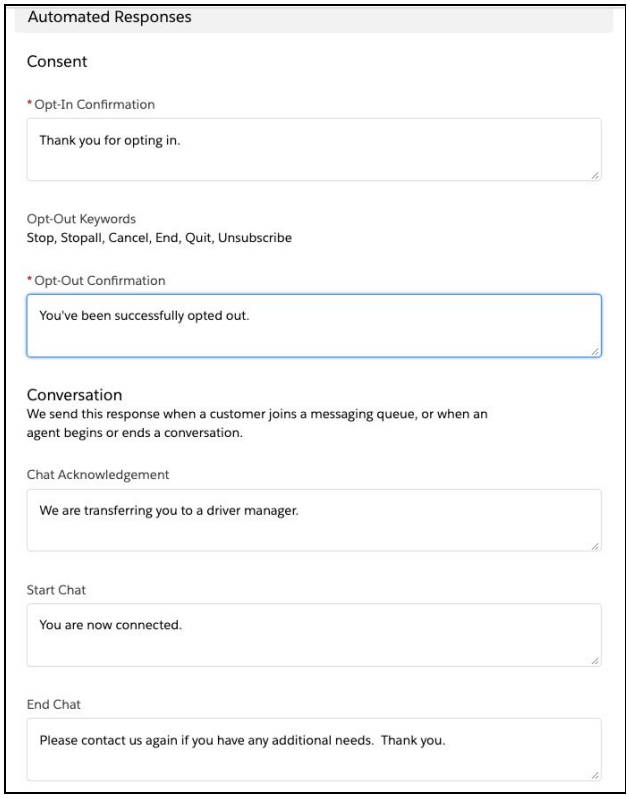
1. From Setup, in the Quick Find box, enter Messaging, and then select **Messaging Settings**.
2. To enable Messaging, click the toggle.

The Channels section is empty until you have a Messaging phone number.

3. To request a phone number, contact Salesforce Customer Support.
   It can take about a day for your phone number to be ready. Refresh the Messaging home page. Your number appears in the Channels list.
4. For your messaging channel, click the action menu and then click **Edit**.
5. The **Channel Name** and **Developer Name** will already be filled out or you can enter the number provided by Salesforce Customer Support.
6. Business hours need to be set in order to set hours that the bot will transfer to a Driver Manager.



7. Make sure that Routing Type is **Queue-Based Routing**.
8. For Queue, select your SMS Queue that was created.
9. Provide an Opt-In, Opt-Out Confirmation, Chat Acknowledgment, Start Chat, and End Chat messages.



Additional Resources for Messaging:
Messaging
Message with Customers
Link a Messaging User Record with Other Salesforce Records
Open Messaging
Log In to Omni-Channel
Accept a Message and Chat with a Customer
Send Agent-Initiated Outbound Messages
Send Images and Files to Customers in Messaging
End a Messaging Session
Link a Case, Lead, or Opportunity to a Messaging Session

Setting up business hours

In Messaging, the bot checks agent availability by using the business hours in the Messaging Settings. If the transfer is attempted outside of the set business hours, the bot moves to the No Agent dialog. To set business hours, see Modify Messaging Channel Settings and Set Business Hours.

Enable and Customize Your Einstein Bot

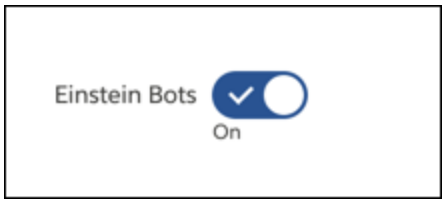
Your Supplyforce Bot:

- Can answer FAQs from your knowledge base, log a case, report absences, and transfer drivers or employees to a driver manager during business hours.

To put your bot to work, you need to enable Einstein Bots, add your SMS Messaging phone number, and activate your bot.

Enable Einstein Bots

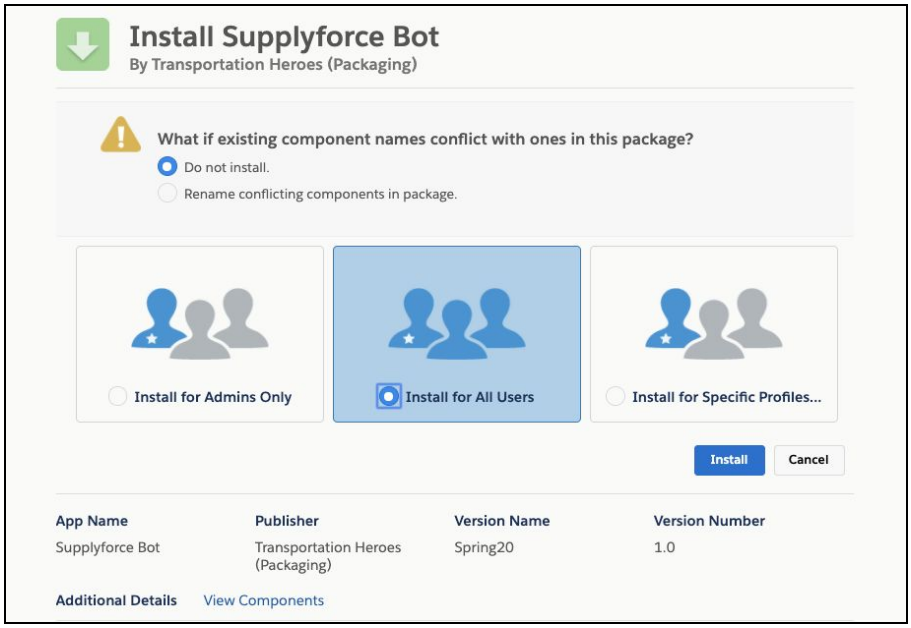
1. From Setup, in the Quick Find box, enter Einstein Bots, and then select **Einstein Bots**.
2. To enable Einstein Bots, click the toggle.



Installing the Supplyforce Bot

Enable Einstein Bots and Messaging prior to installing the Supplyforce Bot.
NOTE: The install will not be successful without enabling bots prior to the install.

Click on ‘Get it Now’ from the Appexchange for the Supplyforce Bot to install. Login with your salesforce credentials to install into your Salesforce Org..



You have options to install for Admins Only, All Users, or Specific Profiles. Select the option that works best for your setup. You can select Install for All Users if all users will need access and click **Install**. The install can take several minutes.

Once installed, you will receive an email from support@salesforce.com stating “Your request to install package "Supplyforce Bot Spring20" was successful.”

Your Bot Dialogs

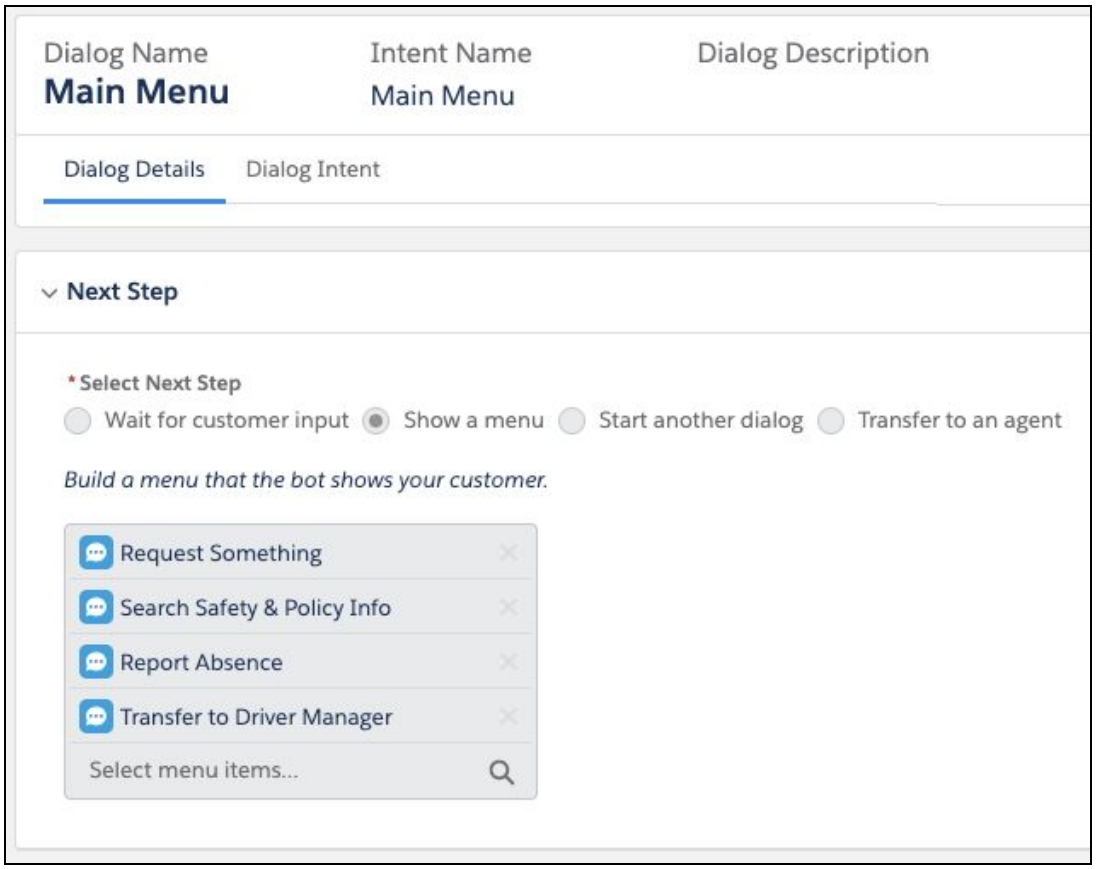
Your bots come with some preconfigured dialogs that are built into a menu to deliver to your drivers. Each dialog represents a specific task that the bot will do.

Welcome

The Welcome dialog introduces the bot to your drivers. To customize the greeting and the name of each bot, edit the Welcome dialog.

Main Menu

The Main Menu dialog presents the services that each bot provides. To rename or remove menu options, edit the Main Menu dialog.



Search Safety & Policy Info

The Search Safety & Policy Info dialog delivers information from your knowledge base based on the driver's search terms. This dialog uses the Summary field from the Knowledge article, so make sure to populate it when you create or edit a Knowledge article.

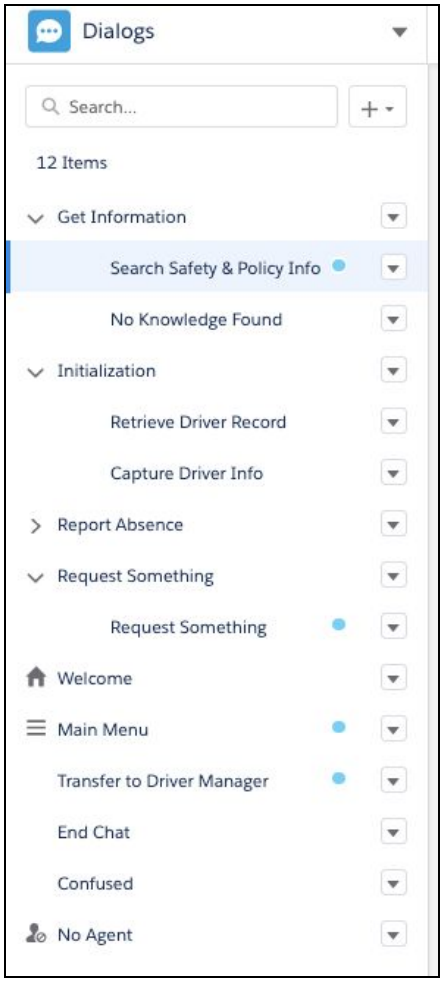
You can use custom fields in your Knowledge article, however you will need to ensure that the permission set of **sfdc.chatbot.service.permset** has the appropriate permission to the fields.

The permission set **sfdc.chatbot.service.permset** controls which objects and Apex classes bots can access. To build a simple bot, you don't have to change anything in the permission set. As you add more features to the bot, edit the permission set to expand access. For instance, you can grant access to Apex classes from **Apex Class Access**; you can grant access to Salesforce objects through **Object Settings**; you can enable access to flows from the **Run Flows** checkbox in the **System Permissions** section.

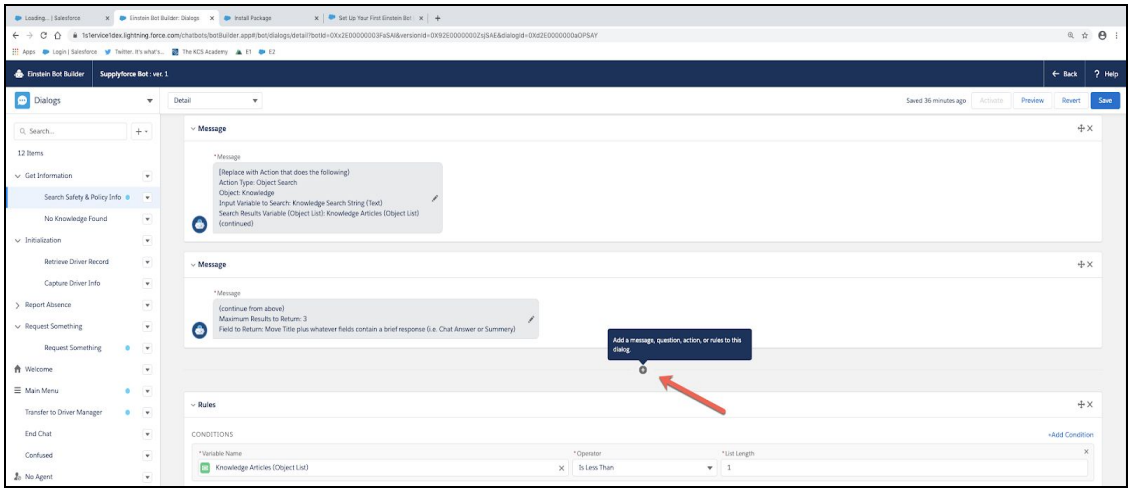
1. From Setup Search **Permission Sets**
2. Search for **sfdc.chatbot.service.permset** and click on the permission set label
3. Edit and add permissions as needed. For using the SupplyForce Bot and Knowledge Title and Summary fields, you do not need to make any modifications to the permission set.

Complete Setup of the **Search Safety and Policy Info**

- Go to the **Search and Safety & Policy Info Dialog**



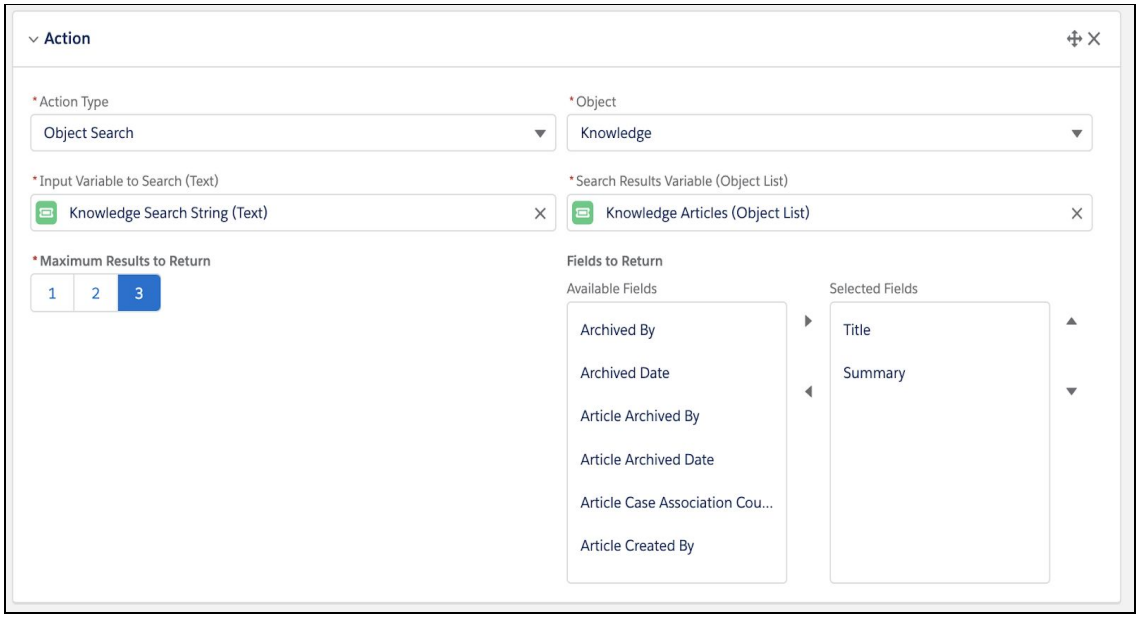
- Click below the messages to add a message, question, action or rules to this dialog.



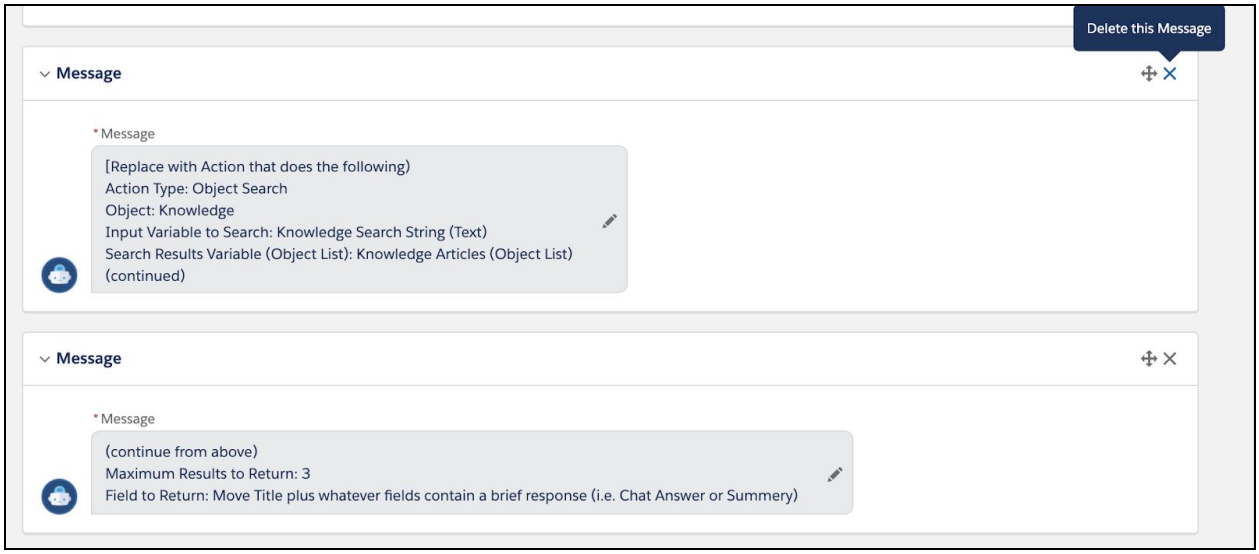
- Select to Add an **Action** with the following selections:

Action Type: **Object Search**
Object: **Knowledge**
Input Variables to Search: **Knowledge Search String (Text)**
Search Results Variable (Object List): **Knowledge Articles (Object List)**
Maximum Results to Return: **3**
Field to Return: **Title, Summary**

The field to return can be other custom fields on the knowledge article, however Title and Summary are out of the box.



- Now Remove the 2 messages above the Action that was created by clicking the **X**.



- Click **Save** to save your changes to this dialog

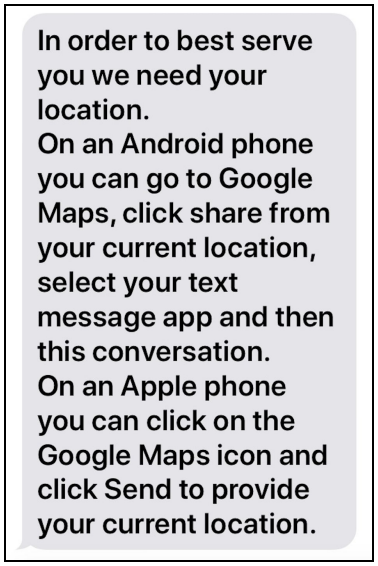
Report Absence

The Report absence dialog allows drivers to report an absence. The dialog will transfer you to a driver manager during business hours. If it is after business hours, a case will be created.

If the driver has not been loaded into Salesforce as a Contact and Messaging User before they send a text message to your messaging number, they will be prompted to provide their first and last name and driver/employee number.

Request Something

When the driver requests something in the Bot dialog the Bot will prompt the Driver to give their location. The drivers will be given instructions in the Bot dialog on how to give their location using an iOS or Android device. See the instructions in the section titled ‘ Other Features to Enhance Your Bots’ on how to use this data or integrate it with Salesforce Maps.

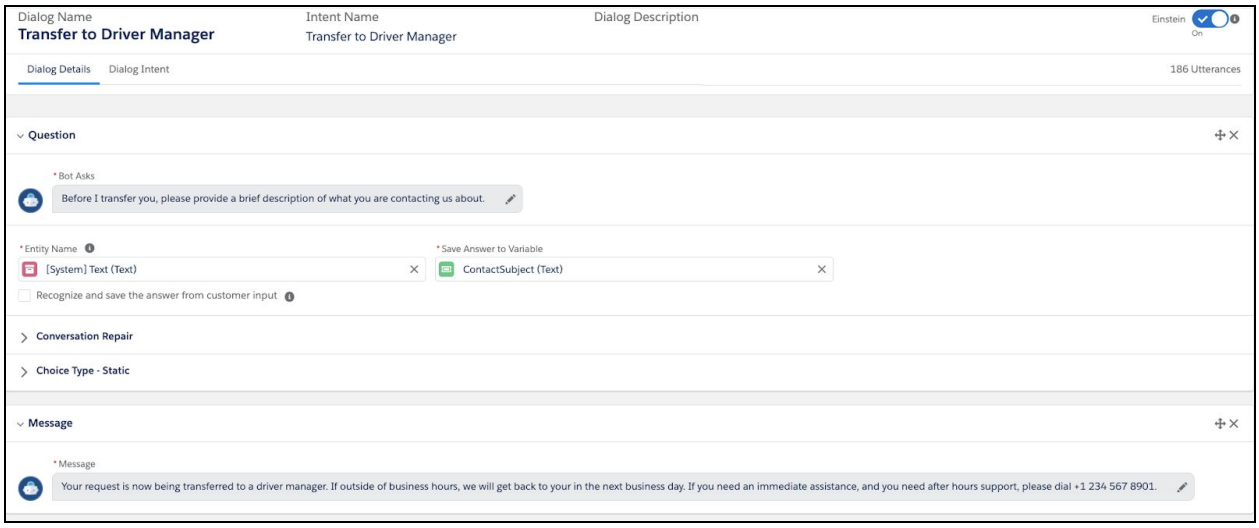


If the driver has not been loaded into Salesforce as a Contact and Messaging User before they send a text message to your messaging number, they will be prompted to provide their first and last name and driver/employee number.

Transfer to Driver Manager

The Transfer to driver manager dialog allows a driver to request a transfer to a driver manager during **Business Hours.**

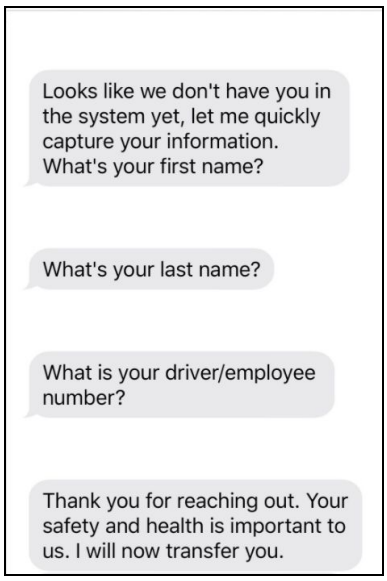
The message in this dialog needs to be modified to include your company's phone number and replace '+1 234 567 8901'.



Collecting details from unknown driver

When an inbound SMS is sent from an unknown mobile phone number that is not in Salesforce, the Supplyforce Bot will prompt the driver for First Name, Last Name and Driver/Employee number. A flow will be leveraged to create a case with the information so that the contact and messaging user can be created manually. After prompting for the information, the Supplyforce Bot will transfer to an agent during business hours.

The Supplyforce Bot will prompt for the following information prior to the creating the case and transfering:



Linking a Messaging User with a contact

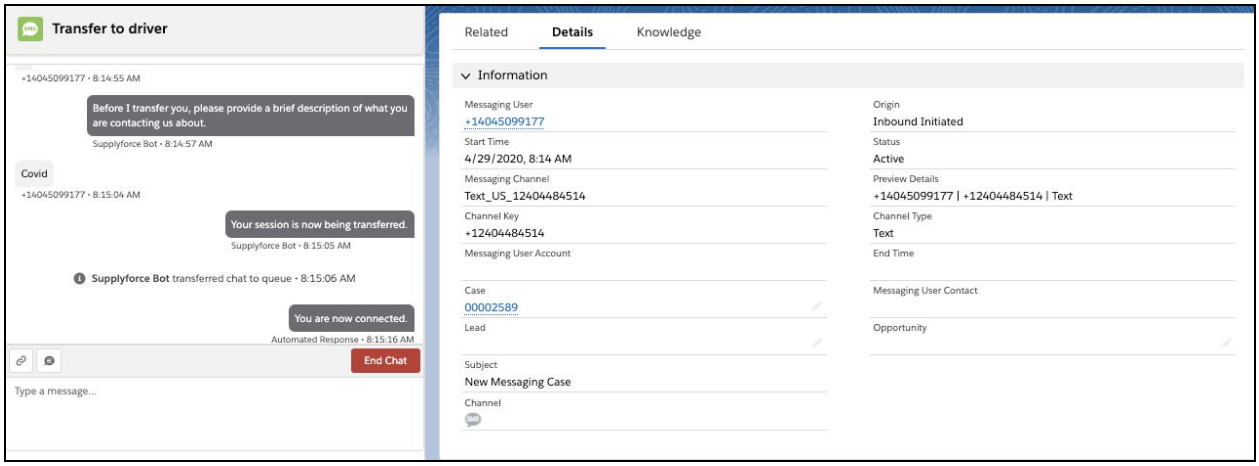
The best practice is to load all contacts and messaging users when setting up your drivers and employees. This should be done with initial setup: How to load your Drivers as Contacts & Messaging Users

If you have an existing contact but you have not created a messaging user or they are contacting you from a new mobile phone number not associated with their contact, then you will need to

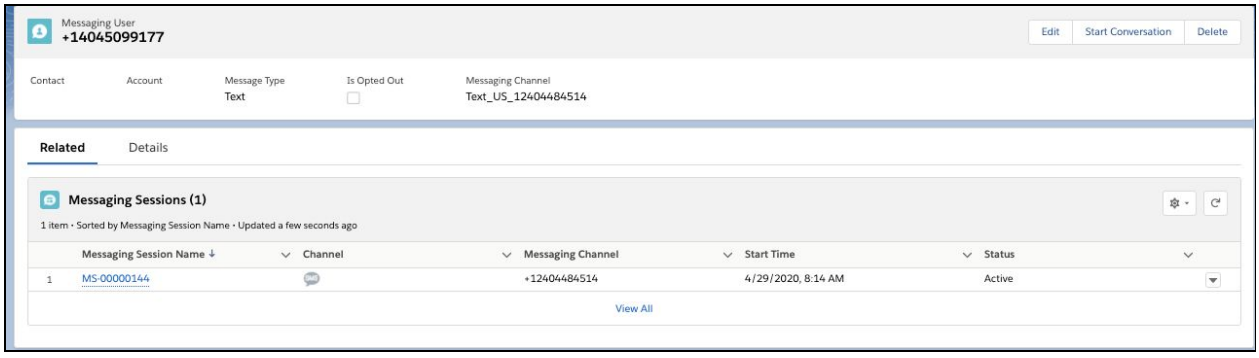
associate their inbound SMS session with their contact. In some cases, you may even need to create a new contact.

The first time the unknown contact transfers via omni channel, you may link the messaging user to the contact in Salesforce or create a new contact. Below is one way to link the messaging user to an existing contact.

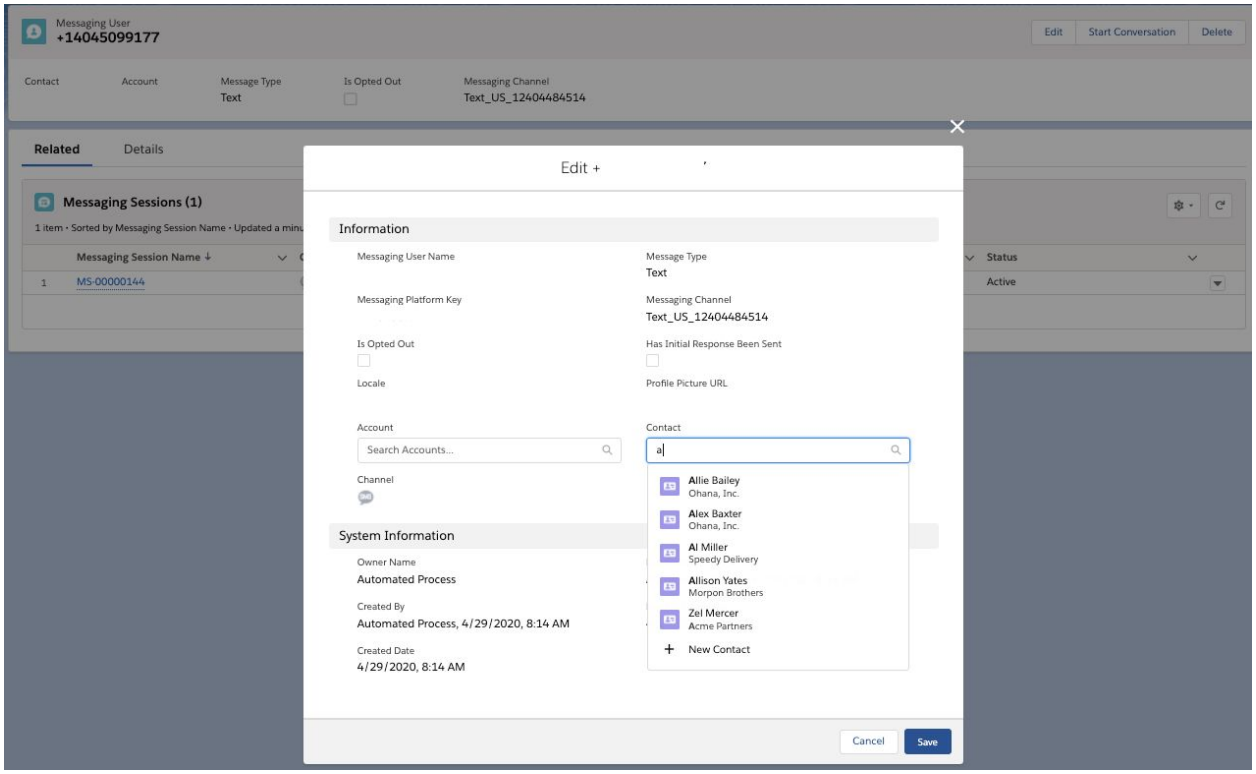
1. Accept the transfer via Omni
2. Click on the Details tab



3. Then click the Messaging User (phone number) and this will open a new subtab.



4. Click Edit on the top right hand corner of the Messaging User. And search for the contact if already in salesforce.



5. Click Save. This now attaches this messaging user to your contact.
6. Continue with the messaging session and end the session when complete. The next time this contact transfers, their contact will screen pop since you have attached the contact and the messaging user.

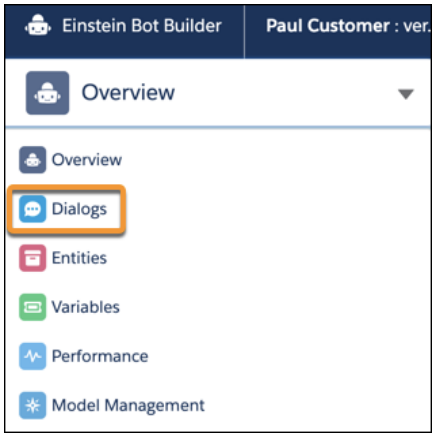
Additional Resources:

Link a Messaging User Record with Other Salesforce Records

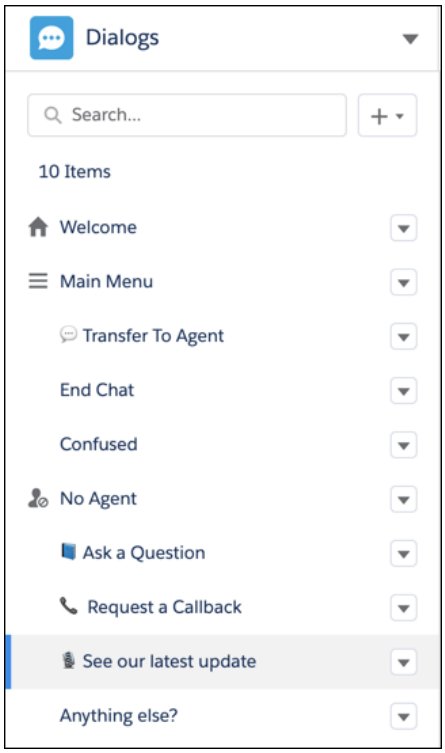
Link a Case, Lead, or Opportunity to a Messaging Session

Customize Your Bot Dialogs

1. From the Bot Builder menu, click **Dialogs**.



2. In the Dialogs list, click the name of the dialog that you want to edit.



3. Make your changes in the dialog detail page.
4. Save your changes.
5. Activate your bot.

Train Your Bot to Understand your Customers

Intents are the driver's reasons for interacting with your Supplyforce Bot. Associate intents with

your dialog then train the bot to create an intent model that your bot can use to understand intents. If your drivers interact with your bot by sending a SMS message, use intents to help your bot understand what they want.

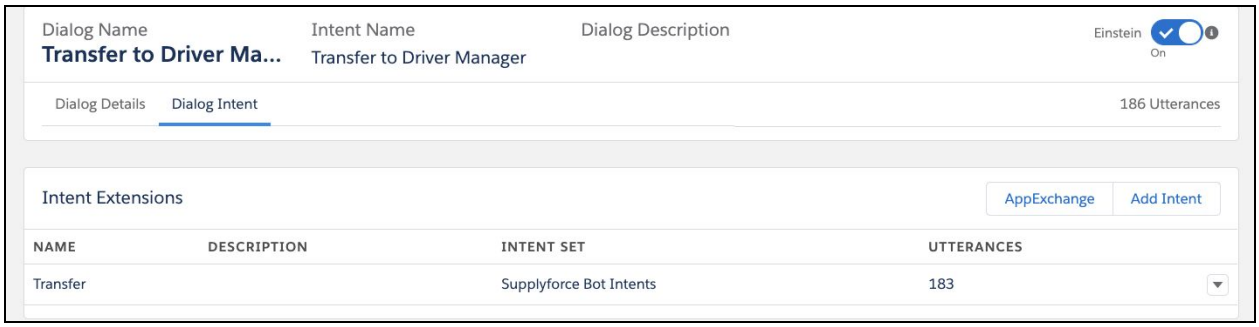
Dialog Intents

The Supplyforce Bot includes utterances for the following intents:

- Transfer to Driver Manager
- Main Menu
- Request Something
- Search Safety Information and Company Information
- Report Absence

Additional Intents can be added as well as additional utterances to train your bot.

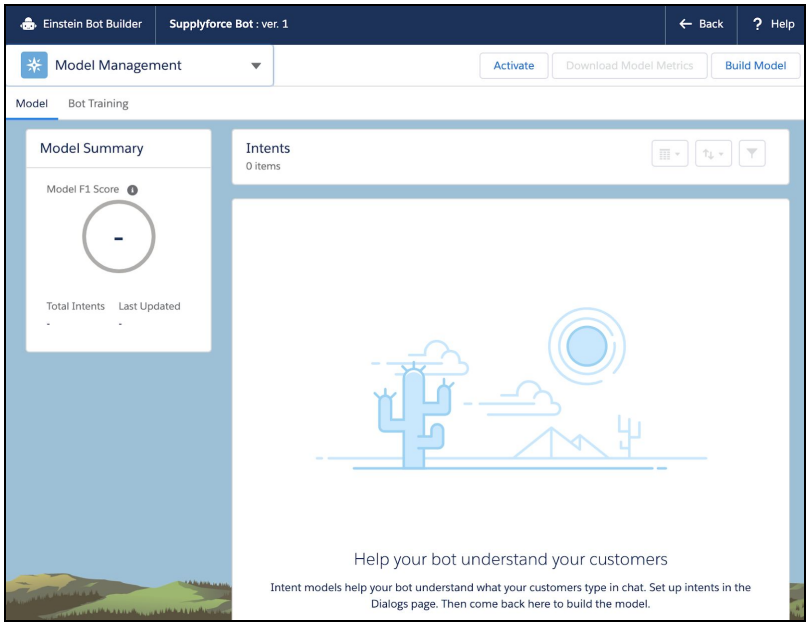
1. From the Bot Builder menu, click **Dialogs**.
2. Click the name of the dialog for which you want to add an intent.
3. Then select **Dialog Intent** and **Add Intent.**



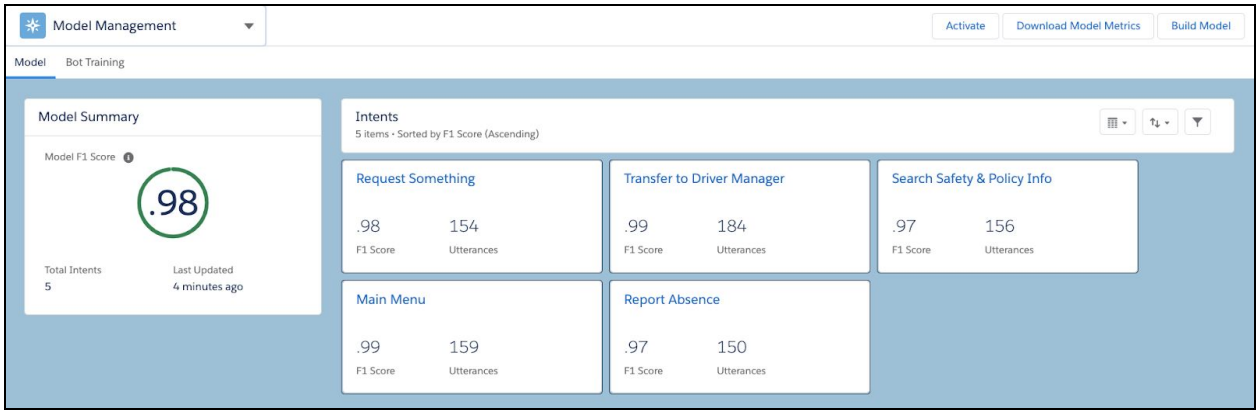
Model Management

To ensure Bot quality, we recommend visiting the Model Management menu often. The model rates intents based on a F1 Score, which is a statistical term that shows how accurate the model is at predicting correctly.

1. From the Bot Builder menu, click **Model Management**.
2. To view intent model metrics, display the **Model** tab
3. Click **Build Model.** This may take several minutes.



Once the model is complete, you will be able to see the F1 score.

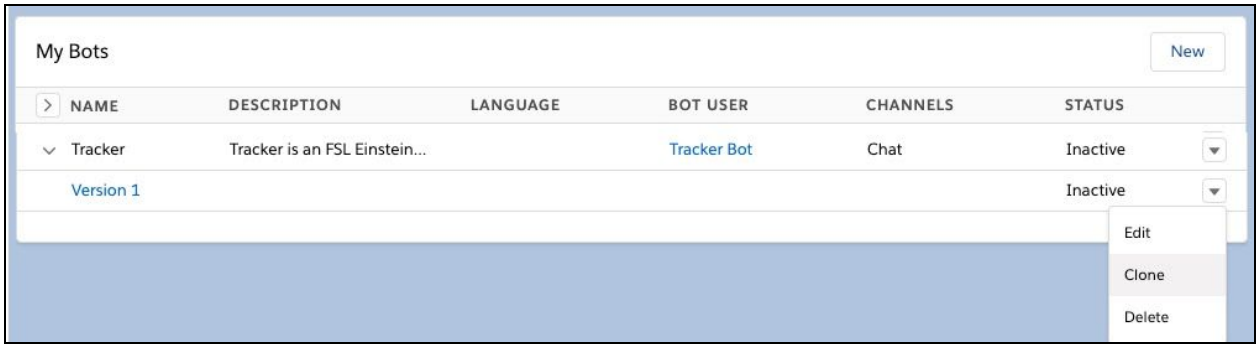


F1 score is defined from 0 through 1, with 1 being the highest possible score. The higher your intent's F1 score, the more likely that the bot predicts correctly every time it has a conversation. F1 scores combine two metrics:

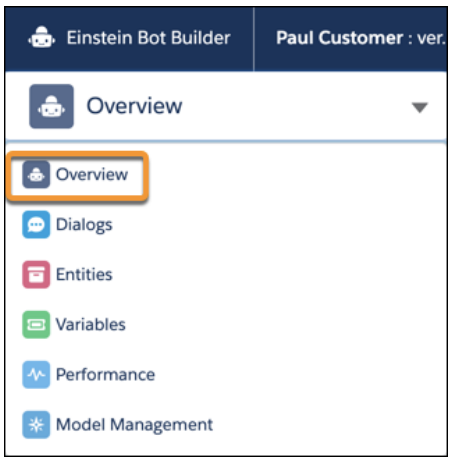
- Precision—the number of correct positive results divided by the number of total positive results
- Recall—the number of positive results divided by the number of total expected results

Deploy Your Einstein Bot to Your SMS Messaging Channel

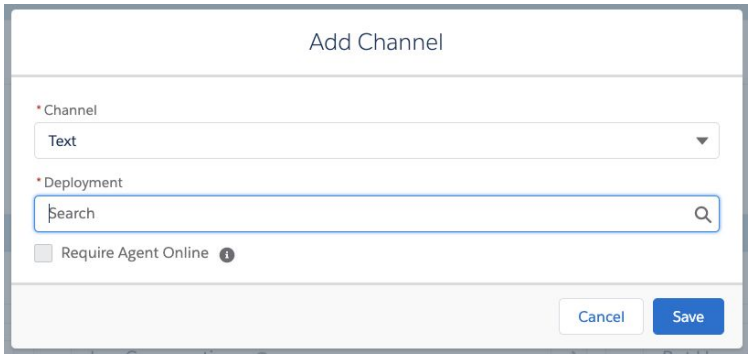
1. For the Supplyforce Bot, click the action menu and then click **Edit**.



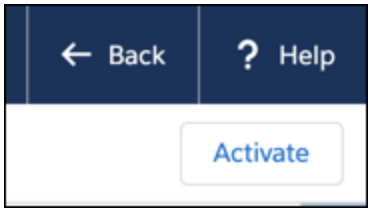
2. If the bot is active, click **Deactivate**.
3. From the Bot Builder menu, click Overview.



4. In the Channels section, click **Add**.
5. For Channel, select **Text**.



6. For Deployment, enter your SMS Messaging phone number. Leave **Require Agent Online** deselected.
7. Click **Save**.
8. To put your bot to work, click **Activate**.

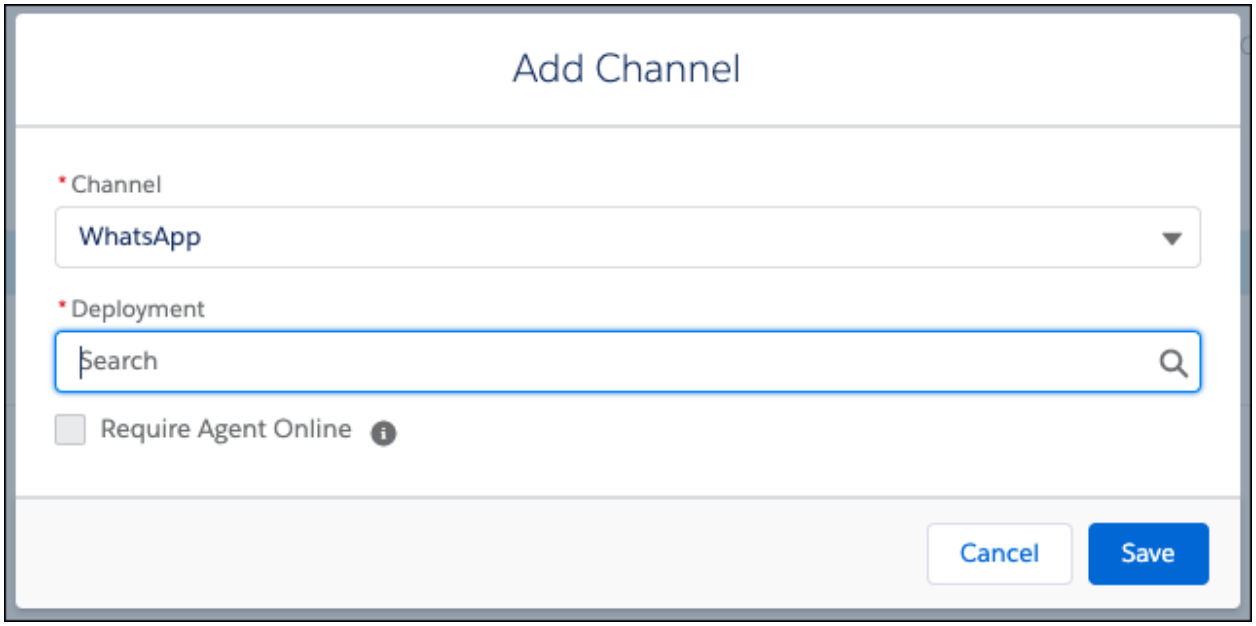


Want to know more about Einstein Bots?
Trailhead: Einstein Bot Basics
Salesforce Help:

- Einstein Bots
- Train Your Bot to Understand Your Customers
- Evaluate How Well Your Bot Understand Your Customers
- Monitor, Analyze, and Refine Bot Activity

Supplyforce Bot for WhatsApp

The Supplyforce Bot can interface with WhatsApp to deliver messages to your drivers. WhatsApp numbers must be set up in Messaging before they can be added to any bot. Once the number is added, navigate to the Overview Page in the Bot Builder. After clicking **Add** in the Channel menu, select WhatsApp as the Channel and the Channel Name into the Deployment field.



Salesforce Help:

- Set Up WhatsApp in Messaging
- Create Notification Templates for WhatsApp
- Notification Types for WhatsApp

Release Notes:

- WhatsApp: Now Available for Einstein Bots

Work in Service Console

Overview

Cases

A case is an employee's or driver's question, feedback, or issue. In this solution we are using a Case to track submitted questions or issues, with a Status to indicate New, Closed, etc. (These values can be configured.)

Case Assignment

Cases can be assigned to Users or Queues.

Queues and Accepting Cases

Cases can be assigned to Queues to keep them organized. You may use Workflow Rules to assign Cases to a Queue.

To create these rules, take the following actions:

1. From **Setup**, enter **Workflow** in the Quick Find box.
2. Click **Workflow Rules.**
3. Follow the steps to create a rule.

As you add or modify Queues, you will need to review these Workflow Rules and Update Actions to ensure Cases are assigned to the correct Queue.

For the most part, Cases will be assigned to Agents via Omni-Channel. However, there may be times when you would like Agents to pull specific Cases from the Queues. Have the Agent take the following actions:

1. Navigate to **Cases** from the **Navigation Menu**.

2. Select the Queue List View.
3. Check the box next to Case(s) the Agent will be working.
4. Click the **Accept** button to make the Agent the new owner of the Case.

Now these Cases will be visible in the My Cases list views for that Agent, and they will no longer be visible in the Queue list views.

Entitlements

Entitlement management helps you provide the correct support to your customers or drivers. Timers start at the creation of the case. For example:

- **Respond to Customers or Drivers** - Agents have 60 mins to communicate with a Customer or Driver
- **Close Case** - Agents have 3 hours to close the case

To learn more, go to: Set Up Entitlements or Manage and Work with Cases

Creating a Service Console

If you do not already have a Servicing Console to manage the incoming SMS messages and Cases. Follow these instructions to create a Lightning Console: Create and Edit a Custom Lightning Console App

Be sure to add the Omni-Channel utility for your console users

Omni-Channel

Omni-Channel is used for consistent work routing across channels.

- With Omni-Channel, you can push the right work to the right agent at the right time.
- Contact centers can manage priorities, capacities, & availability so agents receive work rather than cherry-picking from queues.
- It enables supervisors to view workload, capacity, queues or agents real time in the Supervisor Console and take admin actions directly from the console.

To turn on Omni-Channel for Messaging go to : Set Up Omni-Channel Routing for Messages

Add Drivers to Your Org with Data Loader

Add multiple Drivers to your org at once using Data Loader. Your Drivers will need to be created as Contacts and as Messaging Users to use the Bot. When you enable Messaging, there is a field on the Messaging User object called 'Contact' where you link the two records.

Salesforce Help:
Learn about Data Loader
Create Messaging Users with Imported Data

How to load your Drivers as Contacts & Messaging Users

1. Create a .csv file containing the Drivers Name, Phone Number, and any other required fields on your Contact object.
2. Insert Contacts using Data Loader. Save the succes file to a place where you can find it. You will need it for the next step.
3. Create a .csv file for inserting Messaging Users (see Create Messaging User with Imported Data link above for required fields).
    a. Be sure to add a column to the .csv file called "Contact" for linking the Messaging User and the Contact. Populate the Contact column with the Contact ID from the success file from the Contact insert. This links the two records.
4. Insert Messaging Users using Data Loader.
5. In the Salesforce UI, spot check a few records to ensure the Messaging Users are showing the linked Contact.

Other Features To Enhance Your Bot

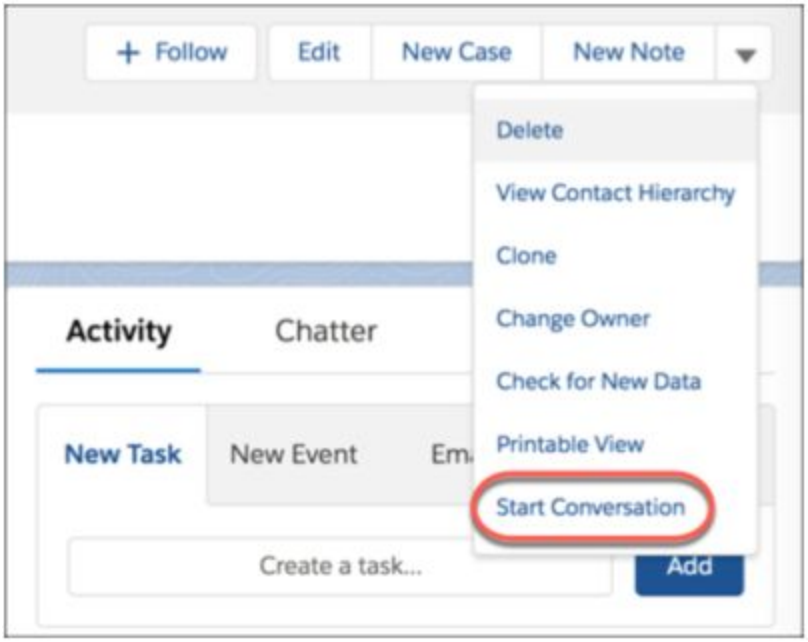
Here are some other features that can help enrich your employee and driver experience.

Initiate an Outbound Message from the Contact

Driver Managers can proactively update drivers on the status of their case or reach out to them by sending outbound messages. Agent-initiated outbound messaging is available only on the SMS text message channel. It doesn't work for WhatsApp. To send outbound messages, Driver Managers need the Agent Initiated Outbound Messaging permission. For more information, see Create a Messaging Permission Set. You can send a message to one driver from the Contact

listview. If you're online when the driver responds, their messages are routed directly back to you. If you aren't online, their messages are routed to a qualified agent who is online.

1. Log in to Omni-Channel
2. Navigate to the Contact
3. Click “Start Conversation”



Additional information for WhatsApp: [Create Notification Templates for WhatsApp]

Initiate Mass Outbound Messages / Send Introduction Messages

You can send a message to many drivers from the Contact list view with some additional configuration.

Below is one way to send an introduction message or mass outbound messages.

1. Go to **Setup** and **Object Manager**. Go to the contacts object and create the following custom fields on the contact under **Fields and Relationships**.
    a. Create New Custom Field
        i. Data Type: Text Area.
        Click Next
        ii. Field Label: SMS Message
        iii. Field Name: SMS_Message
        Click Next

iv. Select Field Level Security for Profile. Make any changes as needed. Click Next
v. Add to Page Layout Screen. Do not need to make any changes. Click Save

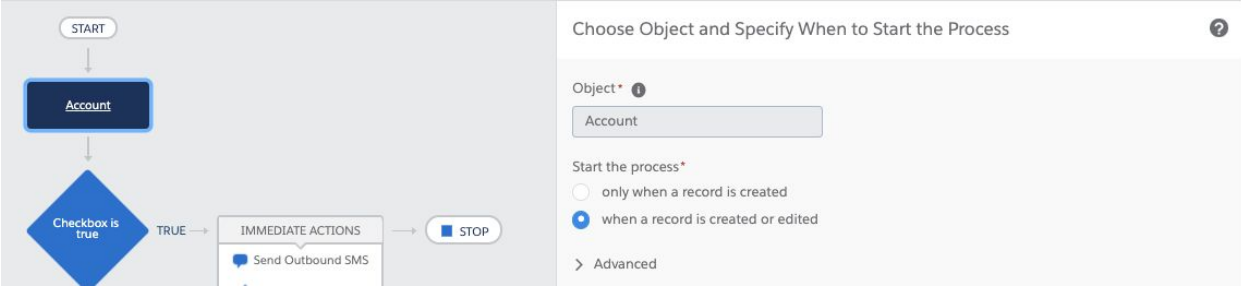
b. Create New Custom Field:
i. Data Type: Checkbox Click Next
ii. Field Label: Send Outbound SMS
iii. Field Name: SMS_Outbound_SMS
iv. Default Value: Unchecked Click Next
v. Select Field Level Security for Profile. Make any changes as needed. Click Next
vi. Add to Page Layout Screen. Do not need to make any changes. Click Save

2. Go to **Setup** and **Object Manager**. Go to the contacts object and create the following custom action on the contact under **Button, Links, and Actions**.
   a. Create a New Action
      i. Action Type: Update a Record
      ii. Target Object
      iii. Label: SEND SMS
      iv. Name: SEND_SMS
      v. Under Predefined Field Values
         1. Select New
         2. Field Name: Send Outbound SMS
         3. Formula Value: True
      vi. Click Save
3. Go to **Setup** and **Object Manager**. Go to the contacts object and create the action on the list view on the contact under **Search Layouts for Salesforce Classic**
   a. Click Edit next to List View
   b. Under **Available Quick Actions** move **SEND SMS** to **Selected Quick Actions**
   c. Click Save
4. Go to Setup and type **Messaging Templates**
   a. Click on **Messaging Templates**
   b. Click **New**
      i. Template Name: Messages to Drivers
      ii. Developer Name: Messages_to_Drivers
      iii. Message: {!Contact.SMS_Message__c}
5. Go to **Setup** and type **Process Builder**. Go to process builder to create a process to send out messages using the SEND SMS action
   a. Click **New** to create a new process
      i. Process Name: Send Outbound SMS
      ii. API Name: Send_Outbound_SMS

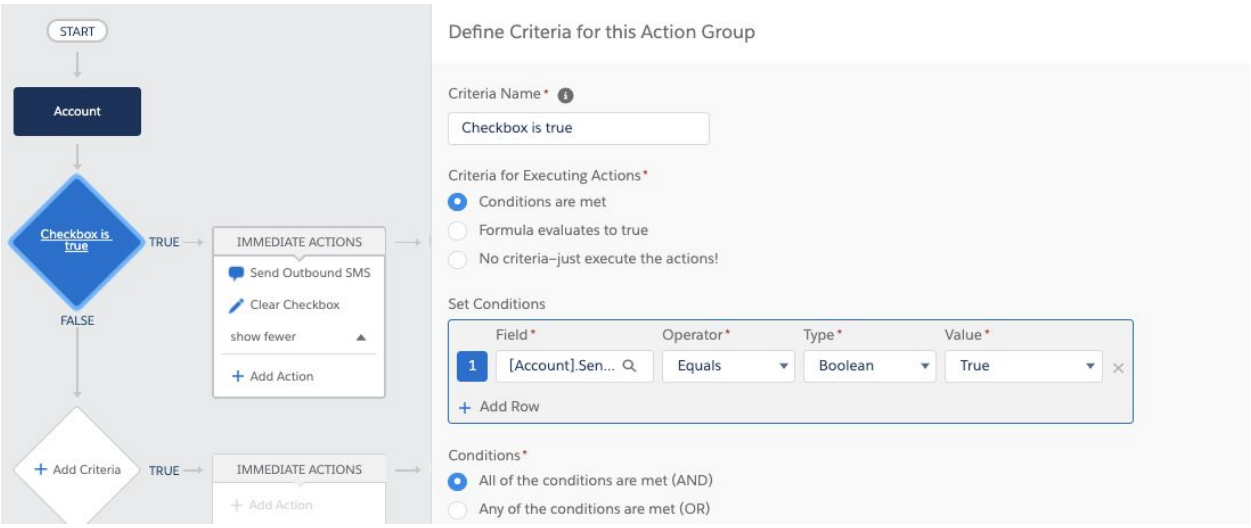
iii. The process happen when: A record changes
iv. Click **Save**

For this process:

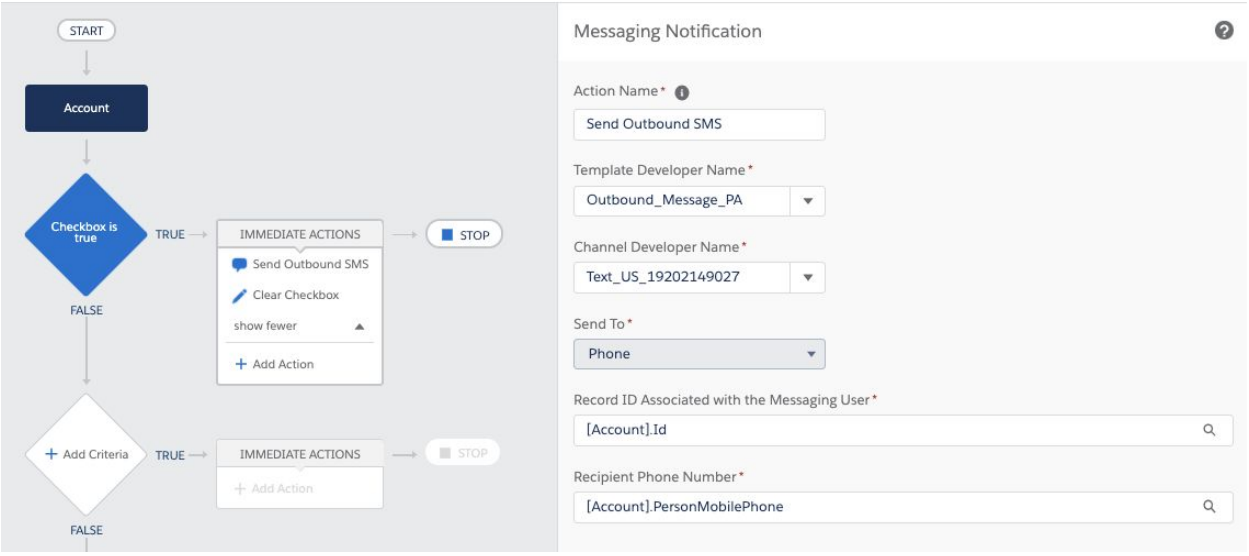
ADD OBJECT
Choose the Object: **Account**
Start the process: **only when a record is created or edited**
Click **Save**



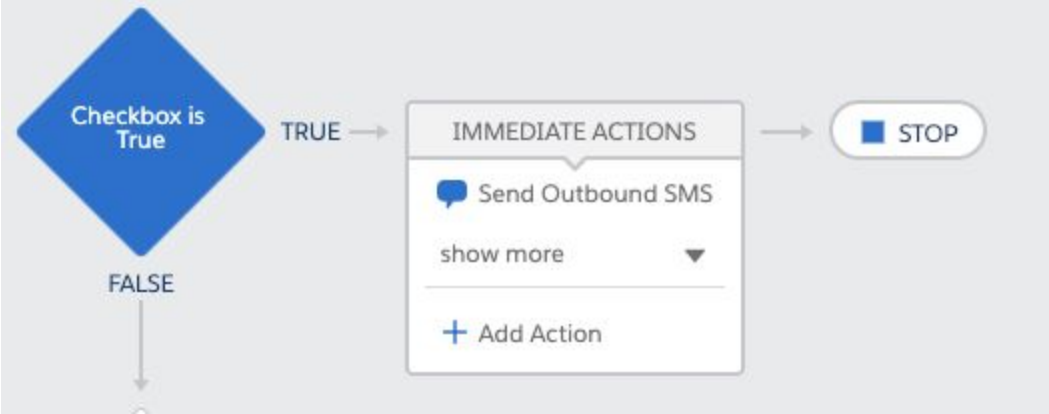
ADD CRITERIA
Criteria Name: **Checkbox is true**
Immediate Actions: **For the Criteria**
Criteria for Executing Actions: **Conditions are met**
Set Conditions:
Field: **Account - Send Outbound SMS**
Operator: **Equals**
Type: **Boolean**
Value: **True**
Conditions: **All of the conditions are met (AND)**
Click **Save**



FOR IMMEDIATE ACTIONS:
Action Name: Send OUtbound SMS
Template Developer Name: Messages to Drivers
Channel Developer Name: Text_US_1XXXXXXXXXX (NOTE: This is your messaging number)
Send To: Phone
Record ID Associated with the Messaging User: {Contact}. Id
Recipient Phone Number: {Contact}.MobilePhone
Click **Save**

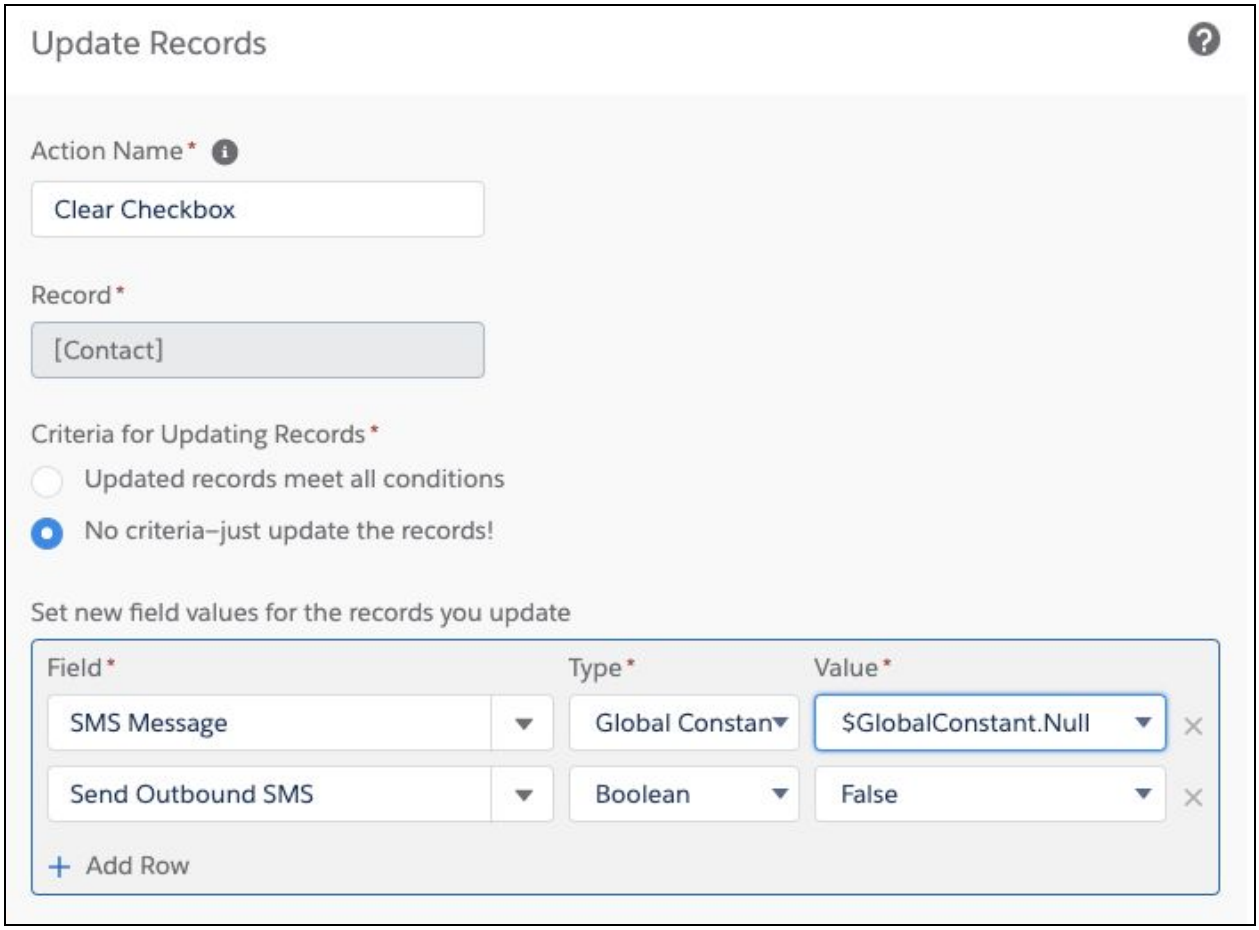


FOR THE 2nd IMMEDIATE ACTION:
Select **+Action**

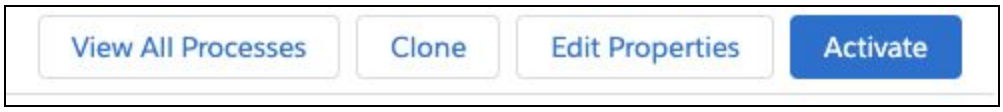


Action Name: Clear Checkbox
Record: {Contact}
Criteria for updating records: No Criteria - just update the records!
Set new field value for the records you update:
Field: SMS Message
Type: Global Constant
Value: $Global Constant Null
Click +Add Row
Field: Send OUtbound SMS
Type: Boolean
Value: False

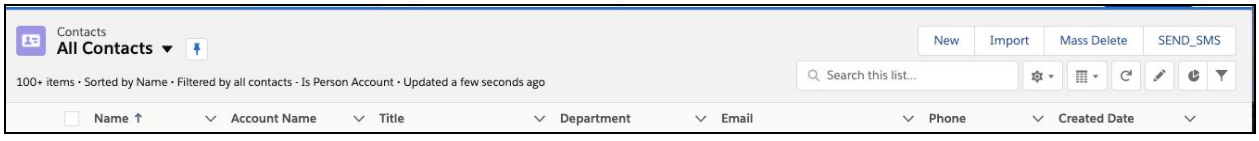
Click **Save**

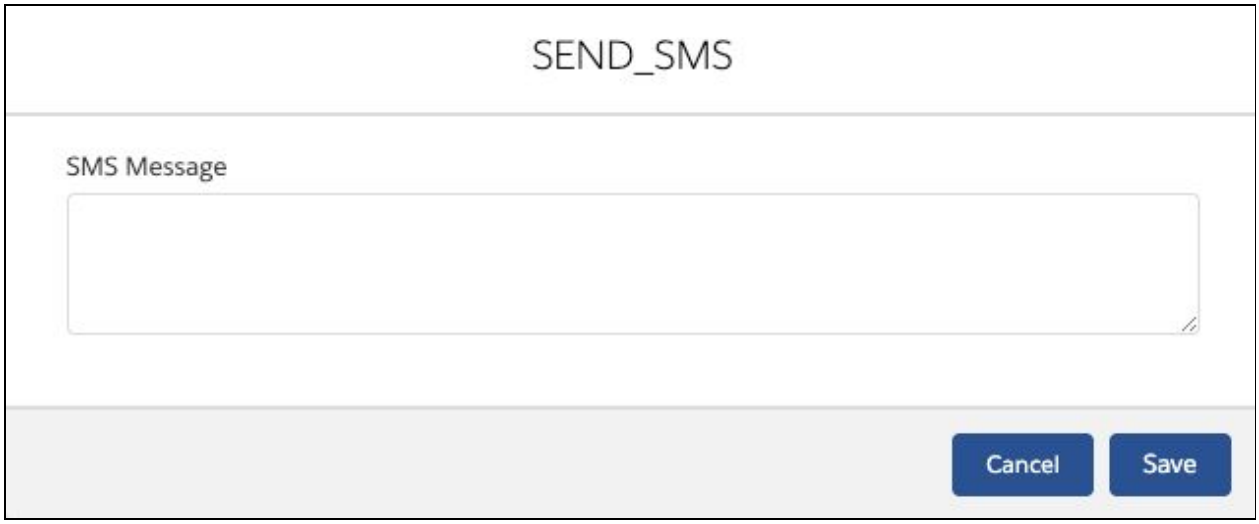


Now Click **Activate** on top right to activate this process.



Once this configuration is complete, to send a message to multiple drivers, go to the Service Console. Go to Contacts List View and select the drivers that you wish to send messages to and then click on SEND SMS action on the top right.





Type the message that you want to send and click SAVE.

You will be asked to confirm the action if you send a SMS to more than 1 employee or driver from this list view.

Click **OK**. This will send messages to multiple drivers at one time such as a welcome message or any mass updates that you wish to make. When drivers respond to any of these messages, the Supplyforce Bot will interact with the drivers to provide the information they need or transfer them to a Driver Manager.

Your Welcome Message to your drivers should include your company name and the services that are now available through this channel.

Notification to Driver when Case Status Changes

You can send a message to many drivers on case status changes in an automated process using Process Builder.

Below is one way to send messages to drives via Process Builder.

1. Go to **Setup** and type **Process Builder**. Go to process builder to create a process for updating employees or drivers when their case status changes.
    b. Click **New** to create a new process
        i. Process Name: Send Outbound SMS for Case Status Changes
        ii. API Name: Send_Outbound_SMS_for_Case_Status_Changes
        iii. The process happen when: A record changes
        iv. Click **Save**

For this process:

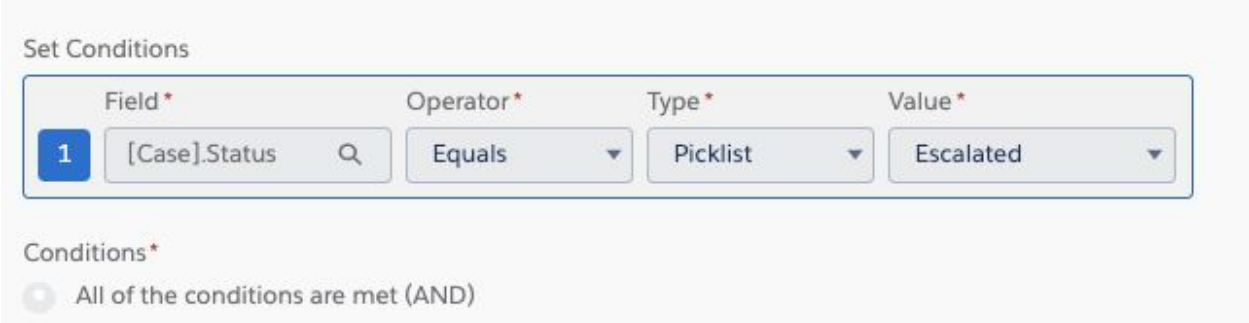
ADD OBJECT

Choose the Object: **Case**
Start the process: **when a record is created or edited**
Click **Save**

DEFINE CRITERIA FOR THIS ACTION GROUP

Criteria Name: Case Status = Escalated
Criteria for Executing Actions: Conditions are met
Set Conditions:

Field: {Case}Status
Operator: Equals
Type: Picklist
Value: Escalated
Conditions: All of the conditions are met (AND)



FOR IMMEDIATE ACTIONS:

Action Name: Send SMS for status escalated
Template Developer Name: Case_Escalated
Channel Developer Name: Text_US_1XXXXXXXXXX
Send To: Phone
Record ID Associated with the Messaging User: {Case}Contact.Id
Recipient Phone Number: {Case}COntactMobile

Click **Save**

Now Click **Activate** on top right to activate this process.

NOTE: This method using Process Builder works for the SMS Channel. For WhatsApp, you will need to Create Notification Templates.

Using the drivers location shared in the Bot

Please note the IMPORTANCE of how you design and implement capturing location data, relating that data, and storing that location data you obtain from the Bot channel as it can impact integration and usability elsewhere, e.g., integration with Salesforce Maps.

Consider how you will use location data and have a basic understanding of the geocoding process with these helpful links:

- How Salesforce Maps handles geocoding
- General geocoding best practices.

Capturing Location from Driver for use with Salesforce Maps & Driver Bot

In order to provide further guidance to your drivers with location awareness you can leverage the power of Salesforce Maps. To use Salesforce Maps with Supplyforce Bot, you will need to capture the address or location shared in the messaging channel and relate it correctly to the appropriate Object - for example a Case Object.

To simplify setup Salesforce Maps automatically works with the following standard Salesforce Objects when using standard address formats:

- Account (using the standard Billing Address)

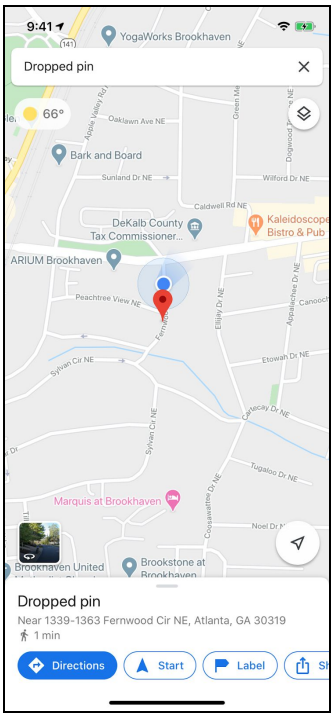
- Case
- Contact
- Lead
- Opportunity
- Task

Below walks through the process for capturing and using your bot's location data with Salesforce Maps in a simple way and also provides helpful resources for more advanced use cases.

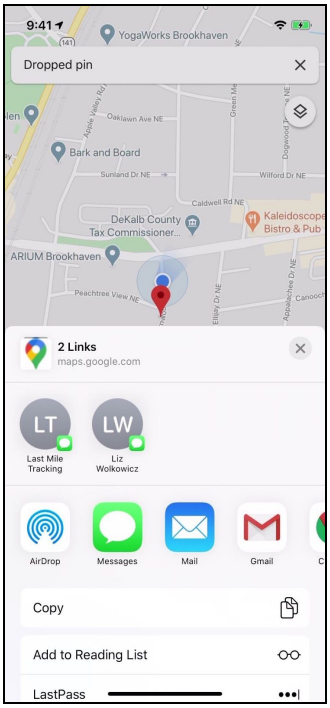
Using standard address and Standard Objects in Salesforce

This is the simplest and recommended approach. Capture drivers location detail by use of Google Maps on either IPhone or Android devices by asking drivers to share their location with the following steps:

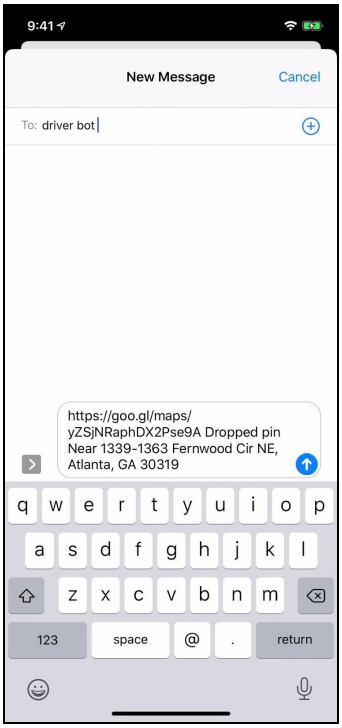
1. Open Google Maps
2. Drop a pin on current location
    a. This validates that the device is accurately representing the driver's current location and allows for simple copy/past of either the address in TEXT* (format)



3. Click Share
    a. Select Bot contact (If you have it saved as a contact (replace Last Mile)



b. Copy and paste

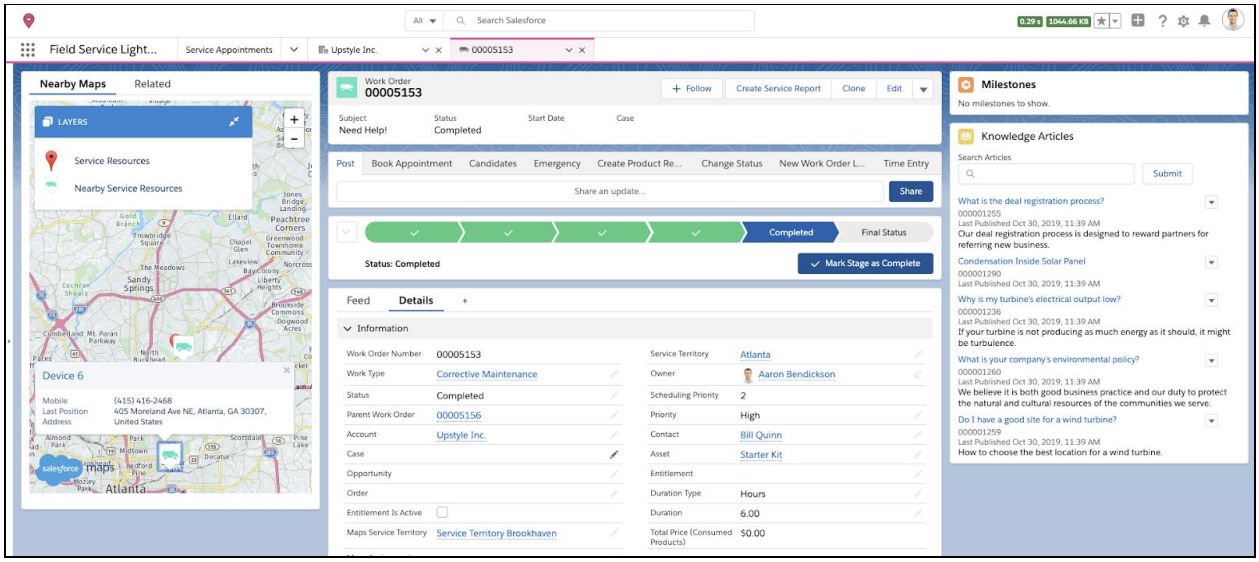


Address format should look like the above images and be normal text so that it can be used within Salesforce with Salesforce Maps standard configuration.

Using a non-standard address or relating to Custom Objects

If you use Custom Objects, Custom Address Fields, or are only able to capture a location with a different data format/type, i.e., Latitude/Longitude, please see the following guides for handling configuration to work with Salesforce Maps.

- Preparing Custom Objects for Salesforce Maps
- Creating Custom Latitude & Longitude Fields for Mapping
- Can I Plot Locations with Only Latitude & Longitude



Salesforce Maps offers the industry's leading Location Intelligence solutions that leverage mapping and optimization technologies. Provide timely assistance to your fleet on a map-based interface and make location-driven decisions.

Once Salesforce Maps has been installed in your org, configure and setup easily by following this implementation guide.

What's already set up if you have a Care Org

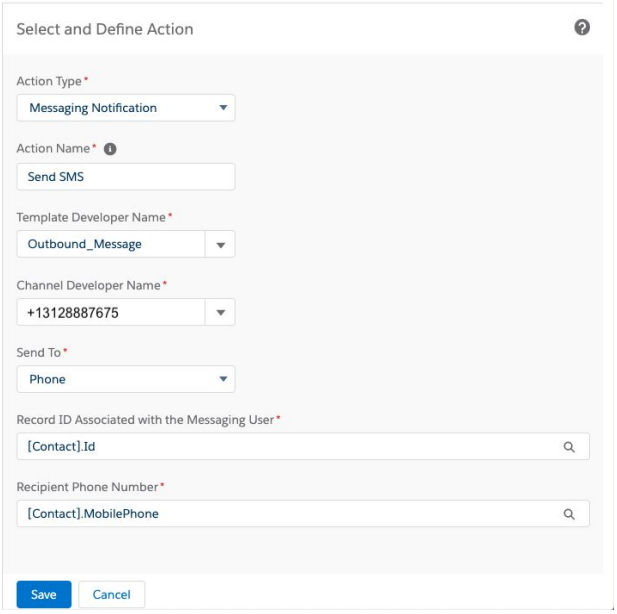
Send Outbound SMS Messages

Your Salesforce org comes with a prebuilt process to send SMS messages to your Contacts. When you add your employees, a Contact record is created for each one. To make outbound messaging work in your Salesforce org, you customize the process.

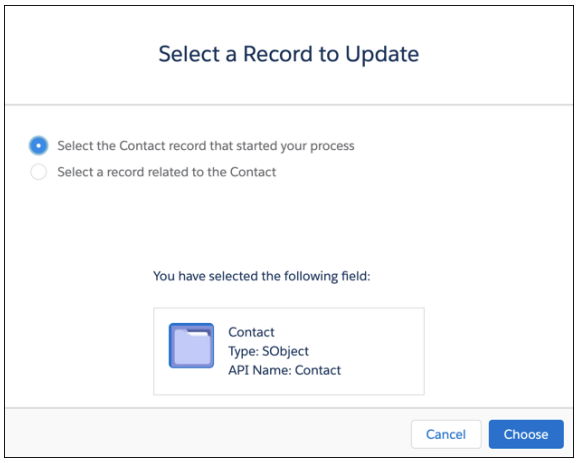
Set Up the Process

You can send outbound messages to your employees. There are a few quick setup steps.

1. From Setup, enter Builder in the Quick Find box, and select **Process Builder**.
2. Select **Send Outbound SMS from Contact** and click **Clone**. To save a copy of this process, click **Save Clone As**.
3. Under Immediate Actions, delete the Unset Message Details action by clicking the action and then **Delete**.
4. Still in Immediate Actions, click **Add Action**.
5. In the Select and Define Action panel, populate the fields as follows:
   Action Type: Messaging Notification
   Action Name: Send SMS
   Template Developer Name: Outbound_Message
   Channel Developer Name: Enter your SMS Messaging phone number.
   Send To: Phone
   Record ID Associated with the Messaging User: [Contact].Id
   Recipient Phone Number: [Contact].MobilePhone (Note: Whichever phone number you choose in this field is the phone number used to contact employees via SMS.)



6. Click **Save**.
7. Click **Add Action** again and populate the fields as follows:
   Action Name: Clean out message
   Record Type: **Click Select a Record to Update**. Click **Select the Contact record that started your process**. Then click **Choose**.

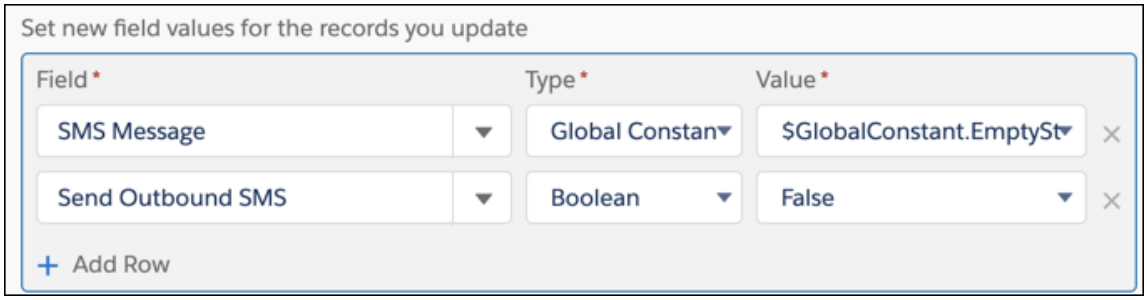


Criteria for Updating Records: No criteria—just update the records.

8. Under Set new field values for the records you update, add the following rows:

   Field: SMS Message
   Type: Global Constant
   Value: $GlobalConstant.EmptyString

   Field: Send Outbound SMS
   Type: Boolean
   Value: False



   These settings clear the outbound message off the Contact record.

9. Click **Save**.
10. Click **Activate**.

Send an Outbound Message

Send an outbound SMS message to any or all of your employees.

1. In the Support Console, click the Contact tab.
2. Select the contacts to message.
3. Click Send SMS.

4. Write your SMS message and then click **Save**. The selected contacts will be updated.

Salesforce Maps

Use Salesforce Maps to visualize and interact with your Salesforce data from a map based interface. Learn more about Salesforce Maps.

Salesforce Maps add tremendous value during these unprecedented and uncertain times. Maps enables your driver managers to easily share and communicate essential needs of drivers, such as, parking availability, rest stop status of things like showers and other amenities that may be closed or operating on special hours due to the pandemic. Some other examples are listed below:

* Identify truck stops and rest areas that are closed
* View available amenities
* Find Walmart locations with overnight parking
* View live traffic and weather
* Help your peers by telling us whether a location is open or closed"

A thorough set of resources for configuration and setup can be found here in the Maps resource center.

Resources

Salesforce Help: Einstein Bots
Salesforce Help: Messaging
Salesforce Help: Service Cloud