Utility Bot Installation Instructions

Pre-Installation Setup

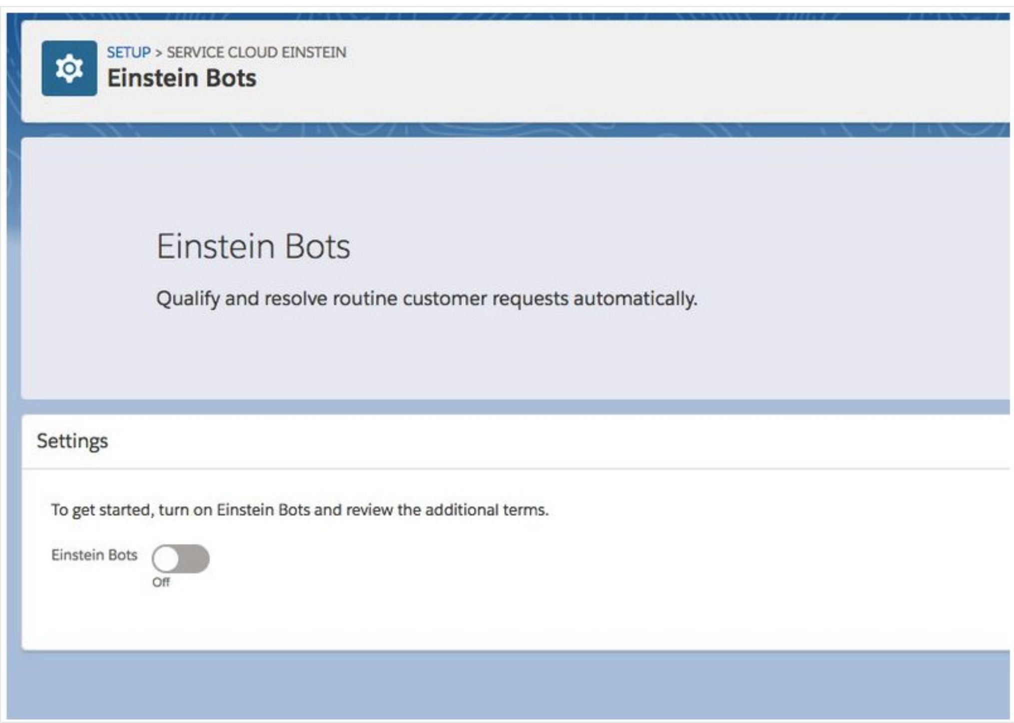
Follow these steps in the sequence listed.

1. Verify that Lightning Experience is turned on

Refer the following help article to verify that Lightning Experience is turned on.
https://help.salesforce.com/articleView?id=lex_enable_turn_on.htm&type=5

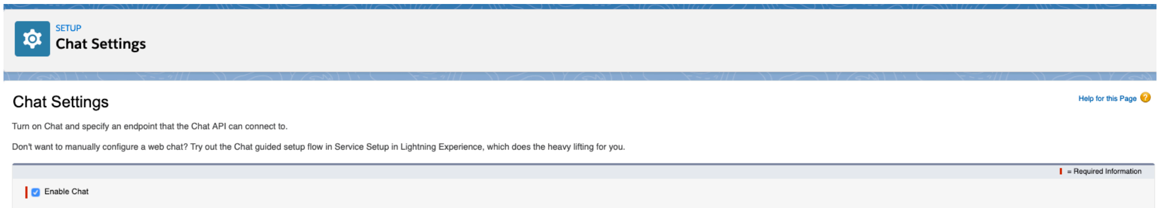
2. Enable Einstein Bot in your Org.

Go to Feature Settings > Service > Service Cloud Einstein > Einstein Bots and toggle the slider to 'ON'.



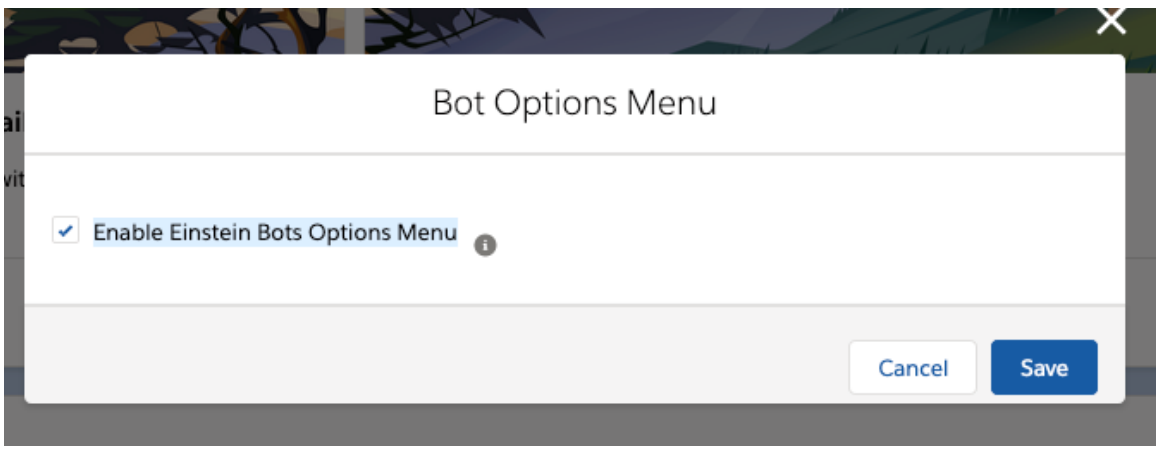
3. Enable Chat

Go to Feature Settings > Service > Chat > Chat Settings and check the 'Enable Chat' checkbox.



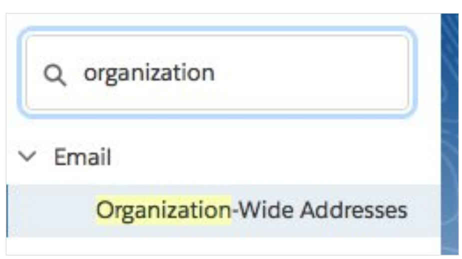
4. Enable Bot Options Menu

Go back to the Einstein Bots setup node in Lightning Experience setup, and click 'Edit' in the actions menu. Check the 'Enable Einstein Bots Options Menu' checkbox.



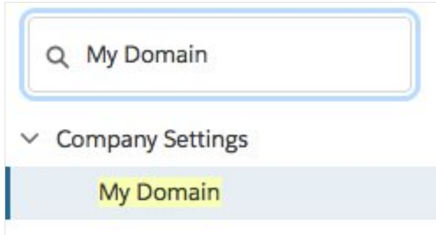
5. Organization wide Email Address

Make sure you have organization wide email address defined. This is needed for sending workflow email alerts. You can refer to this help article.
https://help.salesforce.com/articleView?id=orgwide_email.htm&type=5



6. Create My Domain

Go to 'My Domain' in the Lightning Experience setup and create a domain.



Installation

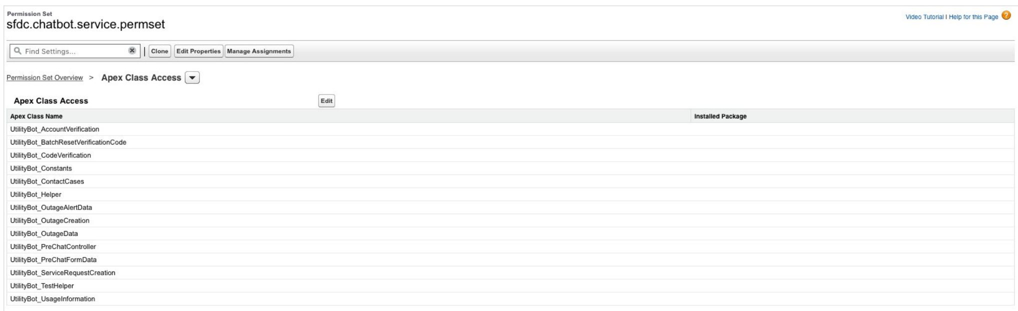
Install the app from the app exchange.

Post Installation Setup

1. Make changes to sfdc.chatbot.service.permset permission set

Update the **sfdc.chatbot.service.permset** permission set as per the following:

- Apex Class access: Make sure the permission set has access to UtilityBot classes as shown below:



Apex Class Name	Installed Package
UtilityBot_AccountVerification	
UtilityBot_BatchResetVerificationCode	
UtilityBot_CodeVerification	
UtilityBot_Constants	
UtilityBot_ContactCases	
UtilityBot_Helper	
UtilityBot_OutageAlertData	
UtilityBot_OutageCreation	
UtilityBot_OutageData	
UtilityBot_PreChatController	
UtilityBot_PreChatFormData	
UtilityBot_ServiceRequestCreation	
UtilityBot_TestHelper	
UtilityBot_UsageInformation	

- Object Access: Set the object access as shown below

Object	Read	Create	Edit	Delete	View All	Modify All
Accounts	☑	☐	☑	☐	☑	☐
Cases	☑	☑	☑	☑	☑	☑
Consumptions	☑	☐	☐	☐	☑	☐
Contacts	☑	☐	☑	☐	☑	☐
Live Chat Transcripts	☑	☐	☐	☐	☑	☐
Outages	☑	☑	☑	☑	☑	☑
Service Areas	☑	☐	☐	☐	☑	☐

- Field Level Security: Set the FLS as shown below:
  - Account

Object	Field Name	Field API	Read	Edit
Account	Account Number	AccountNumber	☑	☐
	Billing Address	BillingAddress	☑	☐
	Shiping Address	ShippingAddress	☑	☐

  - Case

Object	Field Name	Field API	Read	Edit
Case	Account Name	AccountId	☑	☐
	Alert Email	Alert_Email__c	☑	☑
	Alert Phone	Alert_Phone__c	☑	☑
	Case Reason	Reason	☑	☑
	Contact Name	ContactId	☑	☑
	New Service Address	New_Service_Address__c	☑	☑
	Outage	Outage__c	☑	☑
	Service End Date	Service_End_Date__c	☑	☑
	Service Start Date	Service_Start_Date	☑	☑
	Type	Type	☑	☑

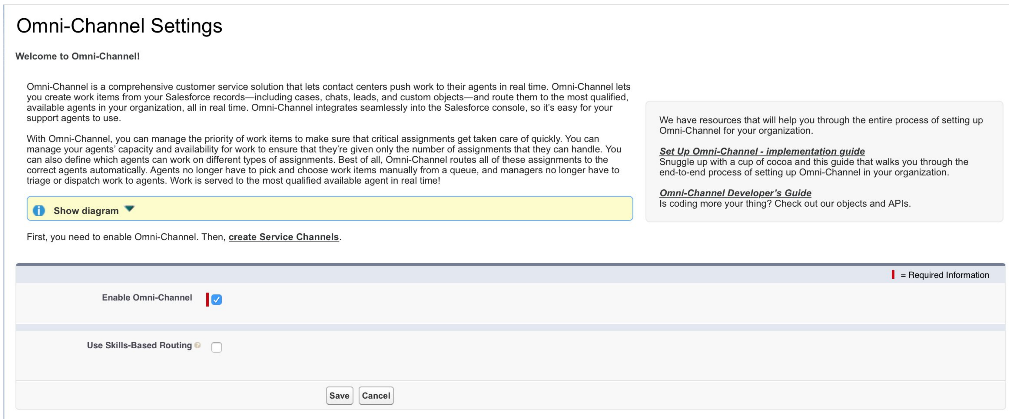
  - Contact

Object	Field Name	Field API	Read	Edit
Contact	Account Name	AccountId	☑	☐
	Code Set Time	Code_Set_Time__c	☑	☑
	Community User Logged In	Community_User_Logged_In__c	☑	☑
	Email	Email	☑	☐
	Verification Code	Verification_Code__c	☑	☑

  - Consumption: Give Read access for all fields.
  - Live Chat Transcript: Give Read access for all fields.
  - Outages: Give Read + Edit access for all fields
  - Service Areas: Give Read access for all fields

3. Omni-Channel Setup

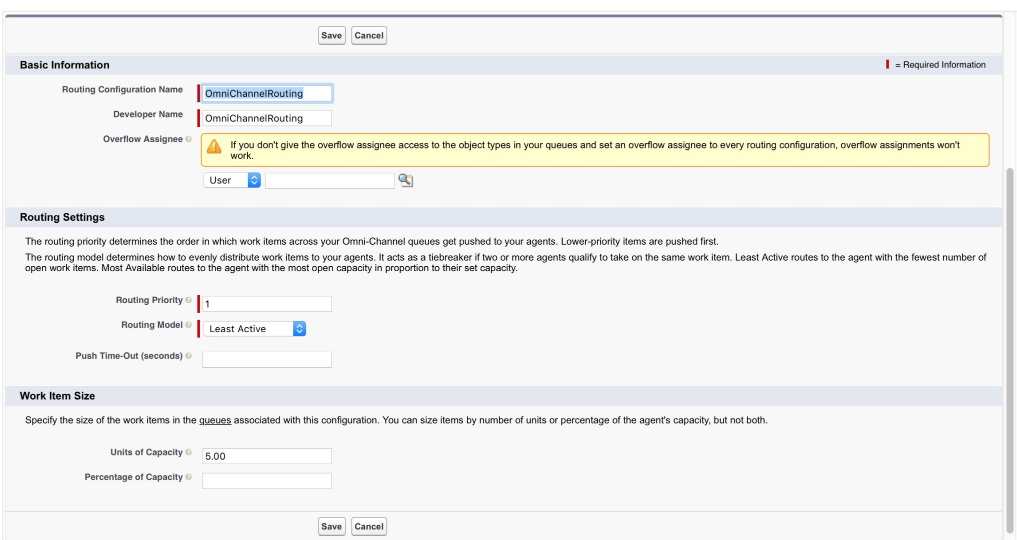
- Enable Omni Channel: In the Lightning Experience Setup sidebar go to Feature Settings > Service > Omni-Channel > Omni-Channel Settings. Enable Omni Channel.



- Create Routing Configurations:

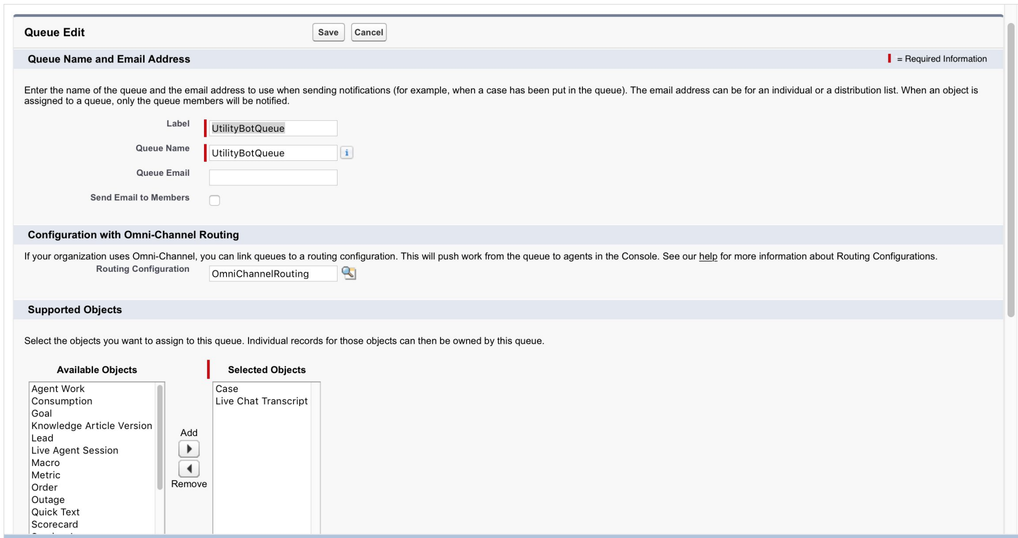
    - In the Lightning Experience Setup sidebar go to Feature Settings > Service > Omni-Channel > Routing Configurations. Enable Omni Channel.

    - Click New and create a new Routing Configuration. Following is an example:



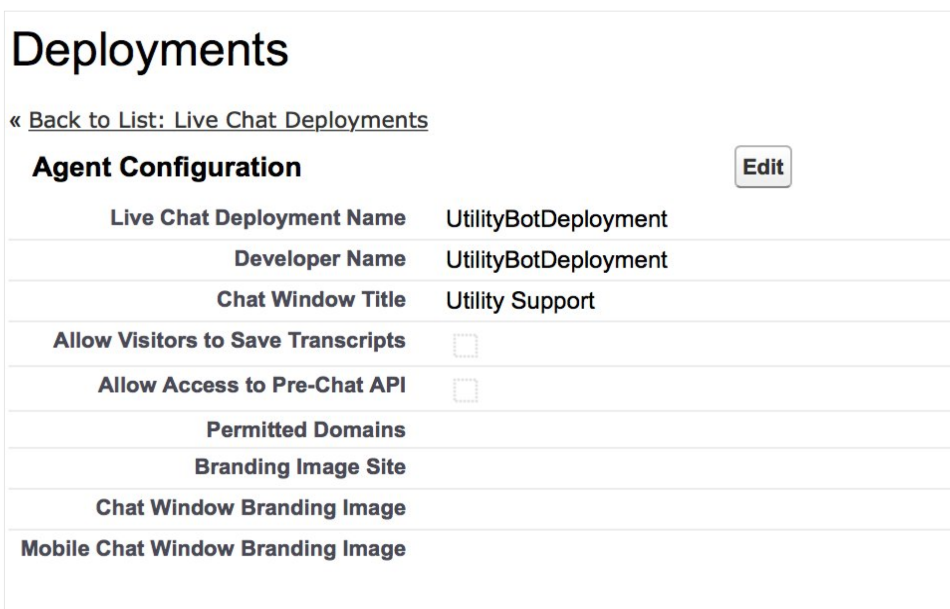
- Create a queue and associate it with the routing configuration created in the previous step

- Go to Users > Queues and click new. Make sure you select the Routing Configuration created in the previous step. Also, add Case and Live Chat Transcript objects in the Support Objects section. Following is an example:

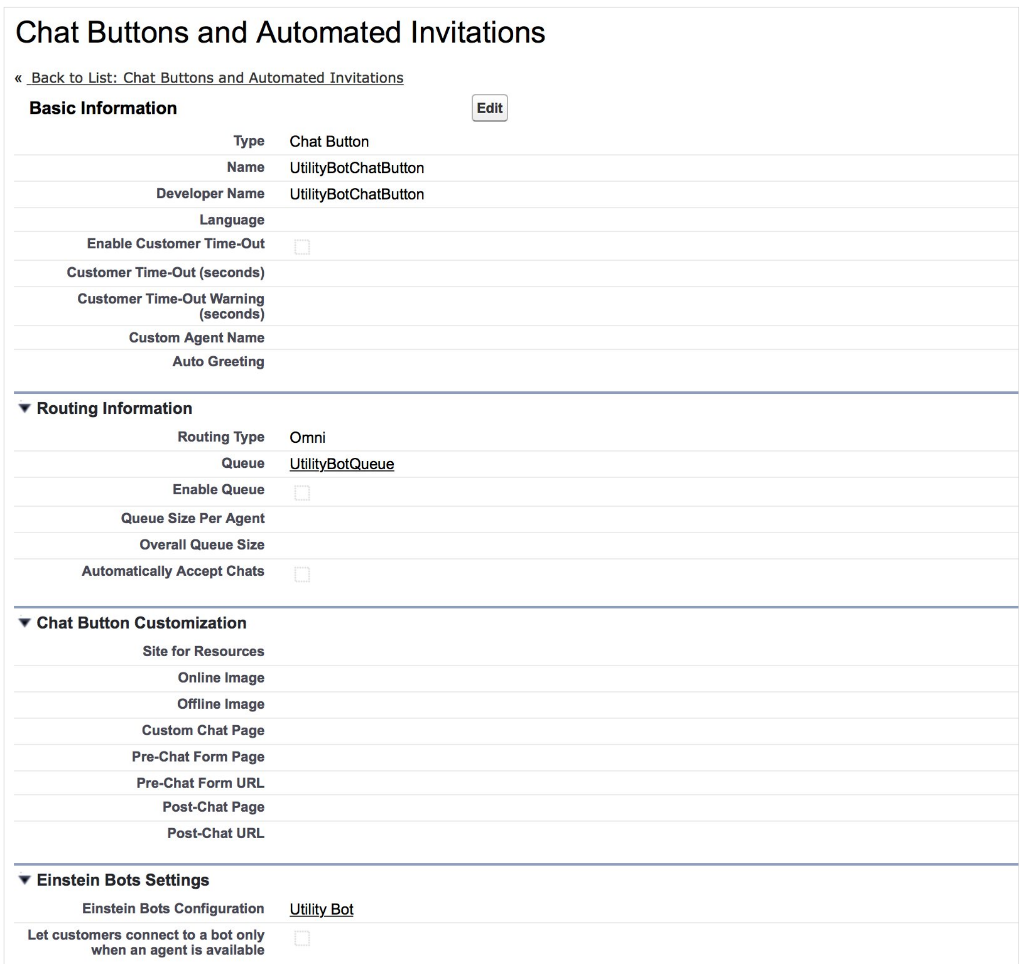


4. Chat Setup

- Create Deployment
  - Go to Feature Settings > Service > Chat > Deployments
  - Create a Chat Deployment called `UtilityBotDeployment`



- Chat Button:
    - Go to Feature Settings > Service > Chat > Chat Buttons & Invitations
    - Create a Chat Button called `UtilityBotChatButton`
    - Under Routing Information section select 'Omni' as the Routing Type and for the Queue select the queue created in the Omni-Channel setup section
    - Scroll down to the `Einstein Bots Settings` and set the Einstein Bots Configuration field to `Utility_Bot` bot and Save.

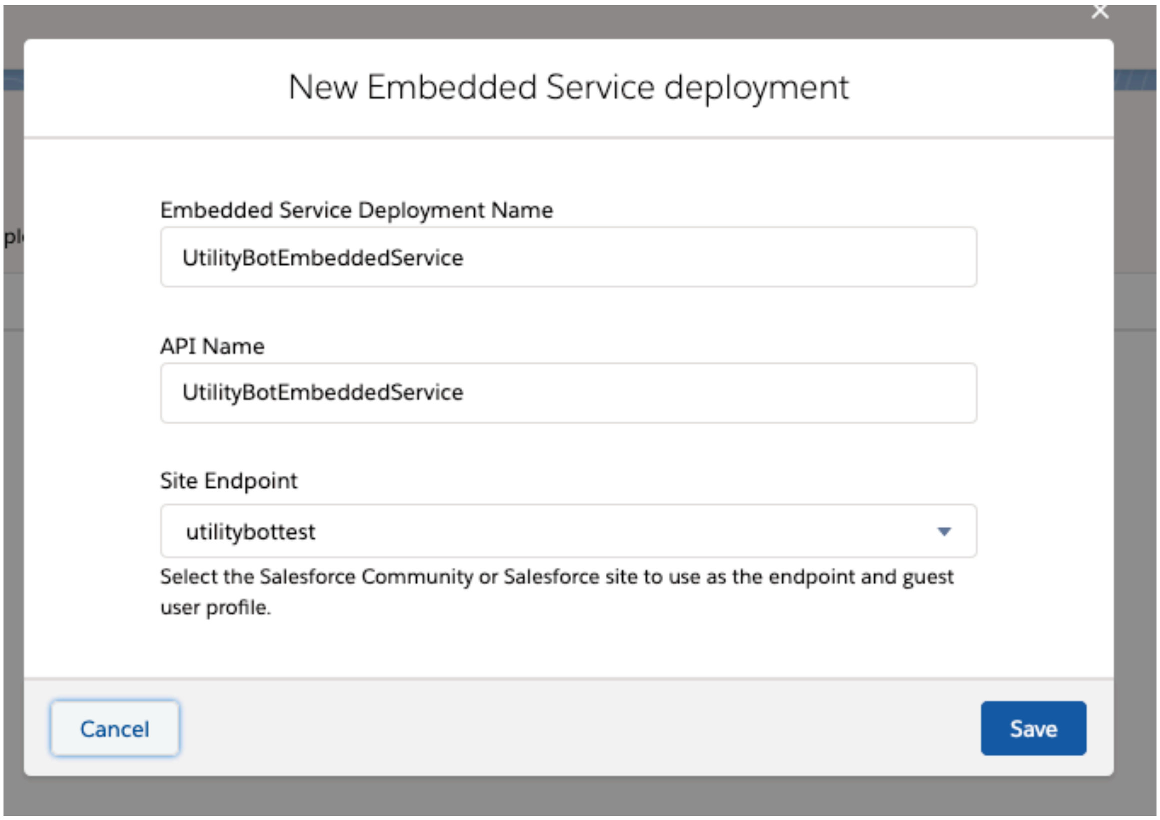


5. Embedded Service Setup

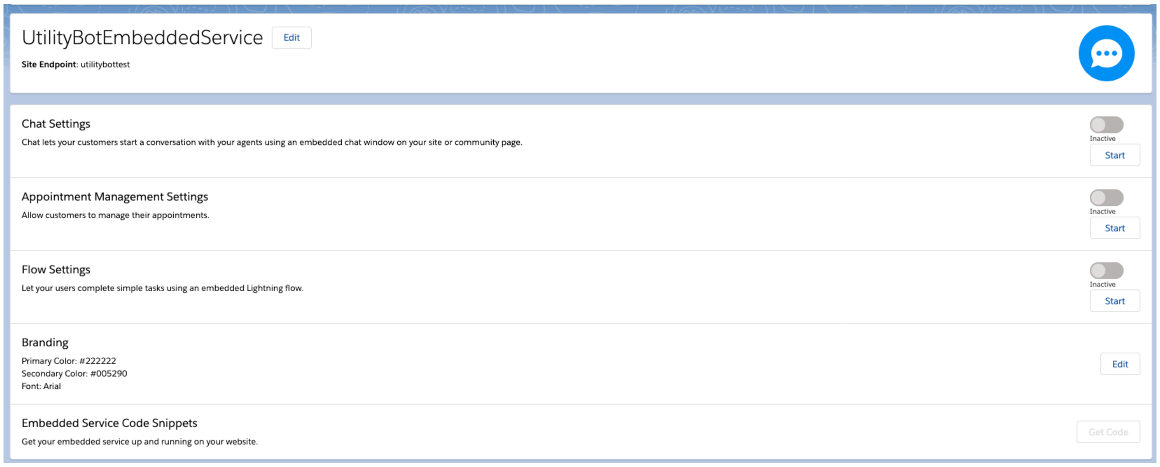
- Snap-In requires a site to be set up. Please refer to this help article for creating/editing Salesforce Sites - https://help.salesforce.com/articleView?id=sites_creating_and_editing_sites.htm&type=5

- Go to Lightning Experience Setup and navigate to Feature Settings > Service > Embedded Service > Embedded Service Deployments. Click on New Deployment.

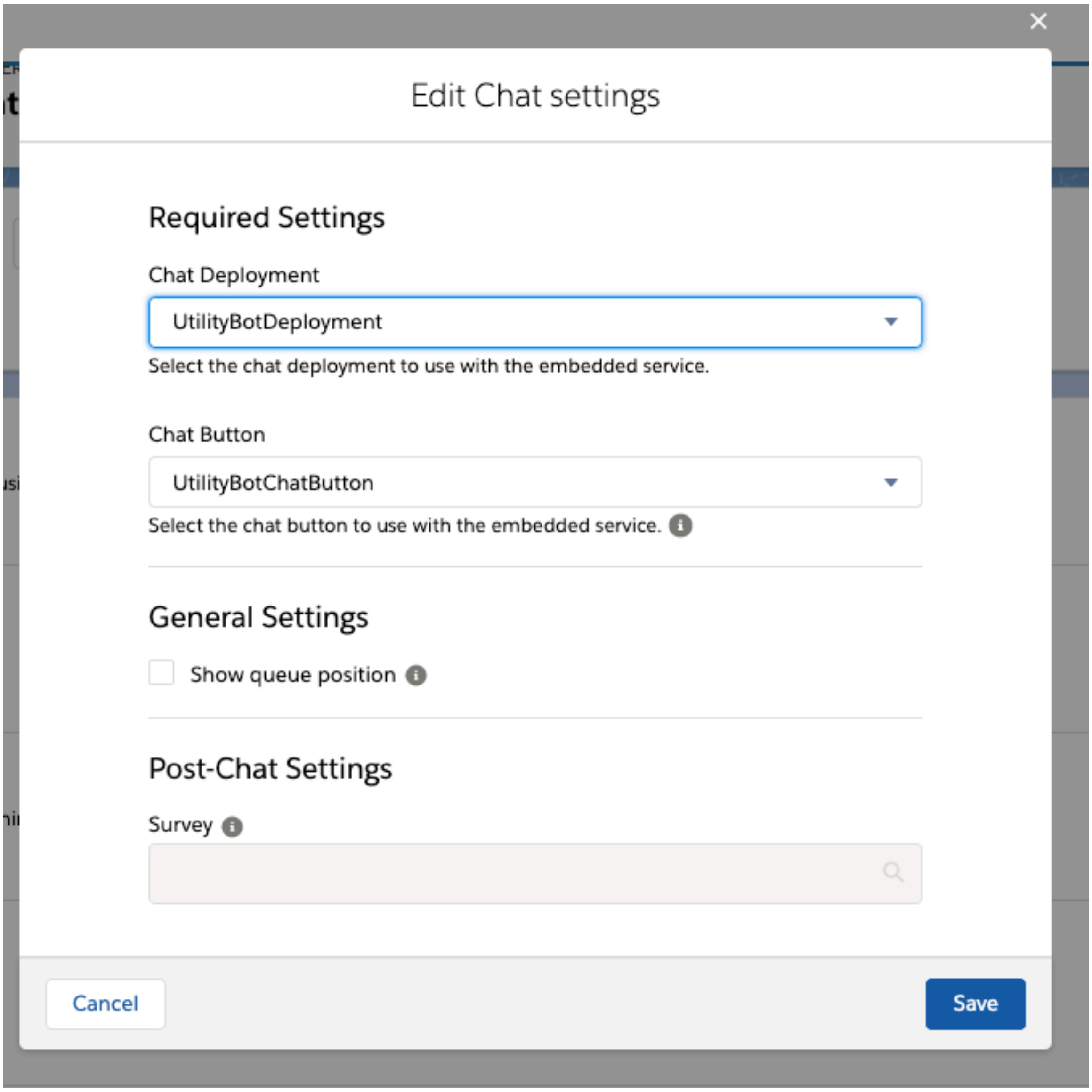
- Enter Snap-in deployment name. API name will be autopopualted. Site Endpoint should auto-populate to the site created in the previous step. Click save.



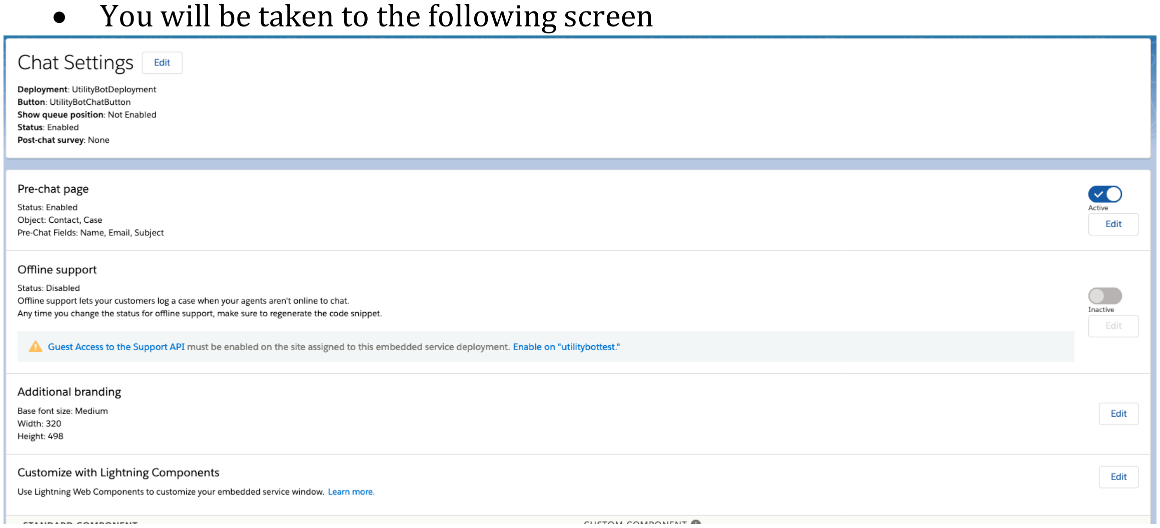
- You will be taken to the following screen.



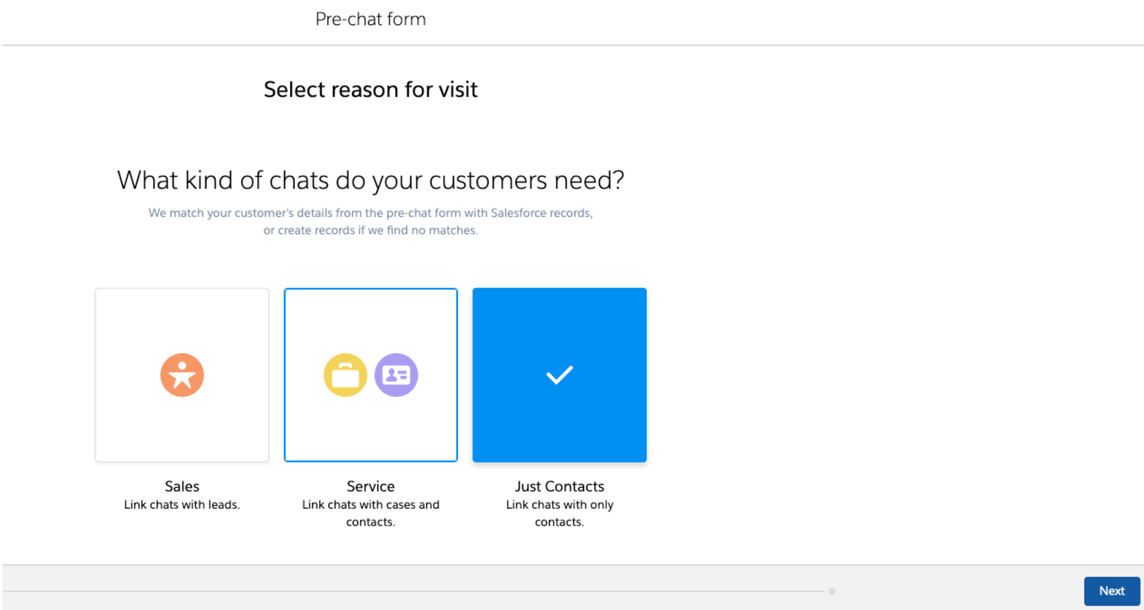
- Click on Start in the Chat Settings. If you have followed the documentation, your Chat Settings should be auto-populated in the screen shown below. Verify details and click save.

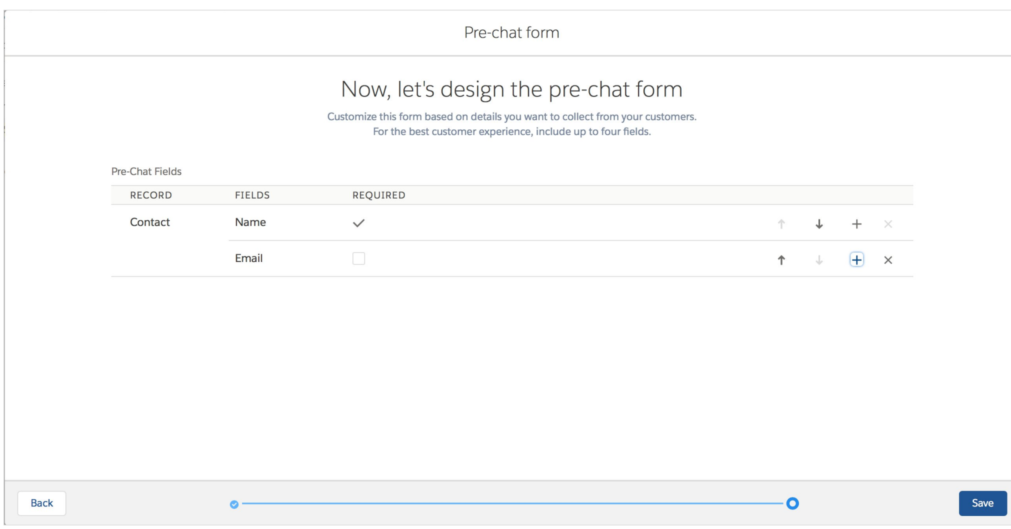


- You will be taken to the following screen



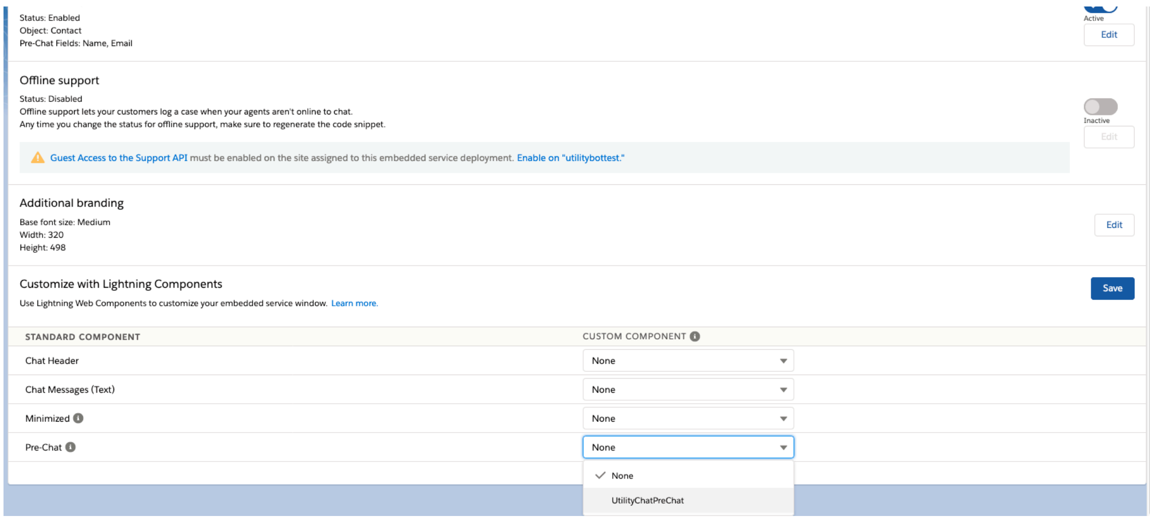
- Click Edit button in the Pre-chat Page section. Select 'Just Contacts' and click next.





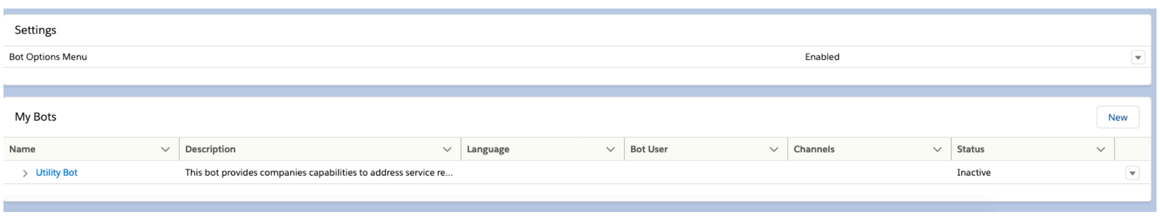
- Make sure that Name and Email fields are shown. Click Save.

- Scroll down to the bottom and click Edit in the Customize with Lightning Components section. Select UtilityChatPreChat component and click Save.

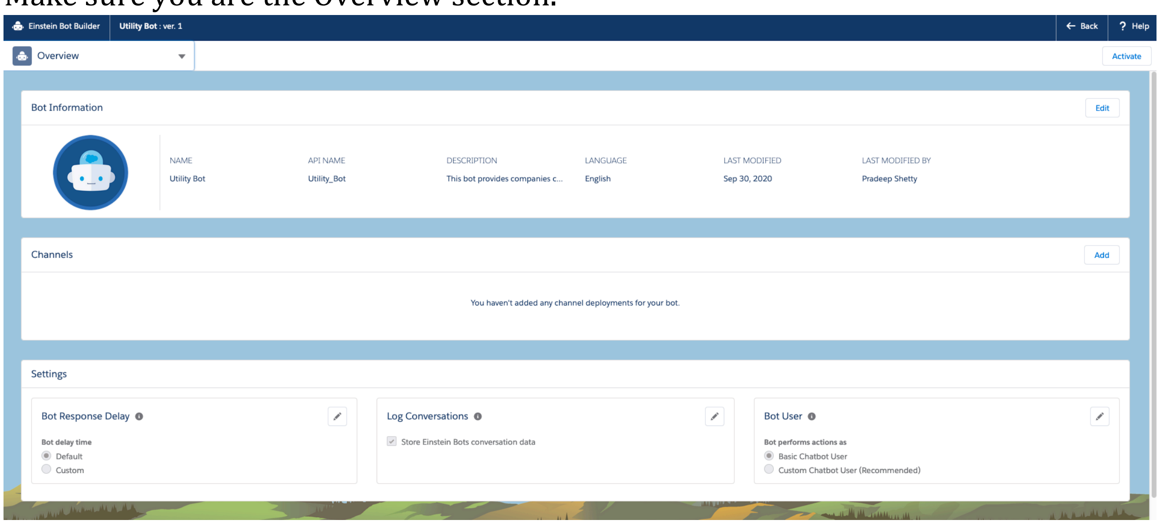


6. Add Chat channel to the Bot

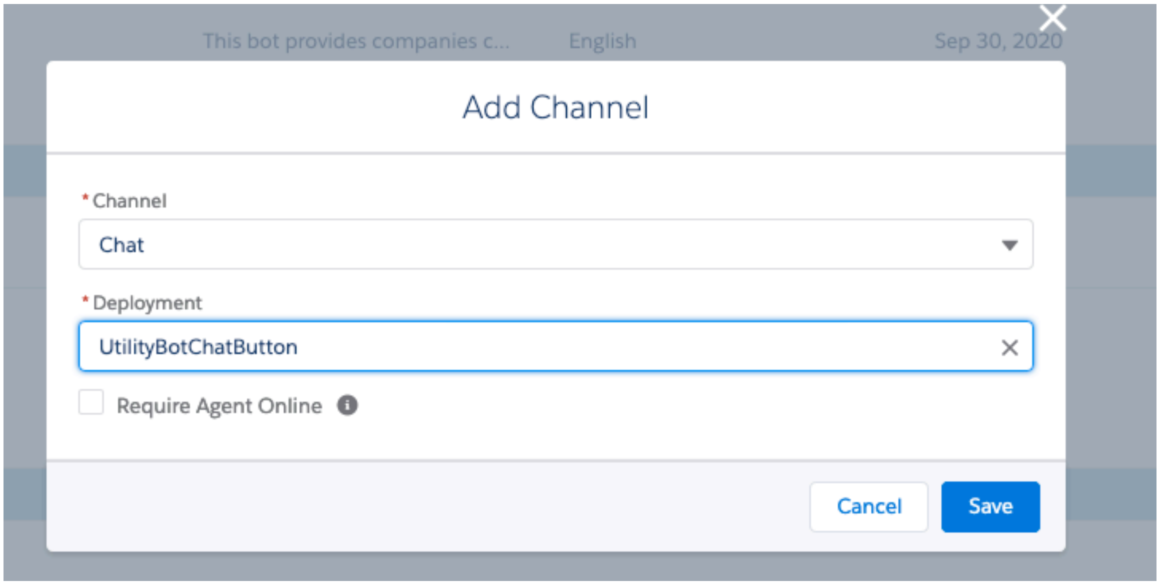
Go the Feature Settings > Service >Service Cloud Einstein > Einstein Bots. Click on UtilityBot.



Make sure you are the Overview section.



Click Add button in the Channels section and add the chat channel. Select the chat button created earlier.



7. Add Organization Wide Email Address to Workflow Email Alerts

- Add Organization Wide email address to following email alerts deployed as part of the package:
    - Service Request Created Email
    - Send Verification Code Email

8. Case Reason and Type picklist values

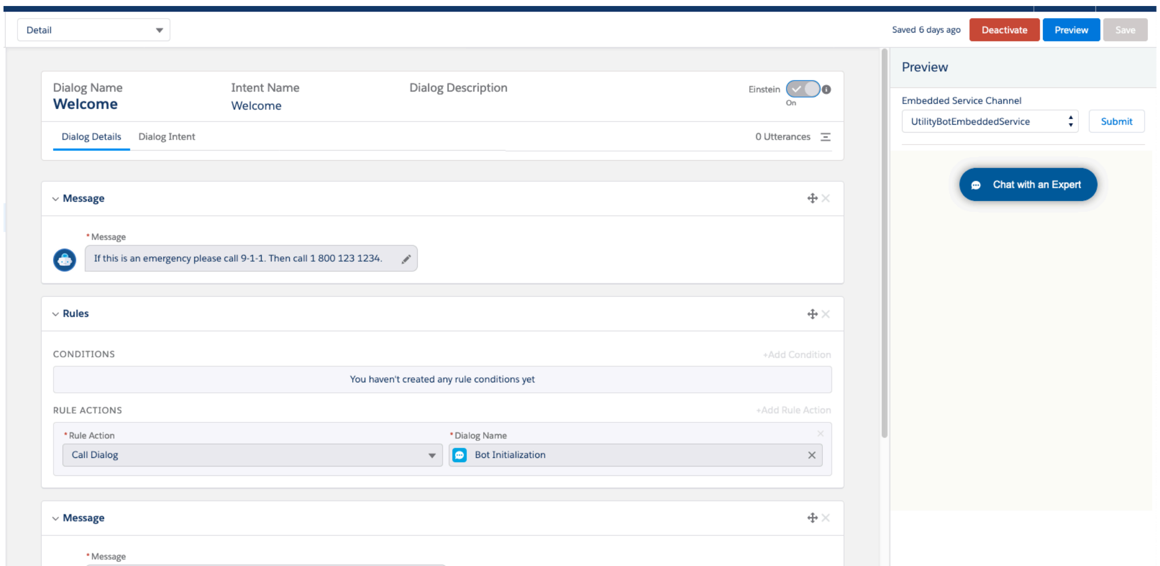
- Make sure that Case Reason and Type fields have the following picklist values. If not, then add them to the list.
    - Case Reason
        - Email Alert
        - Message Alert
        - Transfer
        - Stop
    - Case Type
        - Outage Alert
        - Service Request

9. Preview the Utility Bot

- Make sure you have the data setup as described in the Data setup section of this guide.

- Once the bot is activated, go to the Dialogs page and click Preview.

- Make sure the Embedded Service Channel shows the deployment created in the earlier step. Click Submit



Test Data Setup

- Create an Account and populate Account Number, Billing Address and Shipping Address. The Account number format should be AN-XXXXXXXX (e.g. AN-12345678). This format can be changed in the Einstein Bot configuration.

- Create a Contact tied to the Account created in the first step. Populate First Name, Last Name, and Email.

- Create a Consumption record tied to the Account created in the first step. Bot shows information from the latest consumption record when requested for energy usage information.

- Create an Outage record. If you want the user to get outage information make sure that the Outage Start Date is in the past and status is **not** 'Resolved'.

- Create a Service Area record. The Service Area record should contain the Zipcode used in the outage record.