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Utility Bot Installation Instructions

Pre-Installation Setup

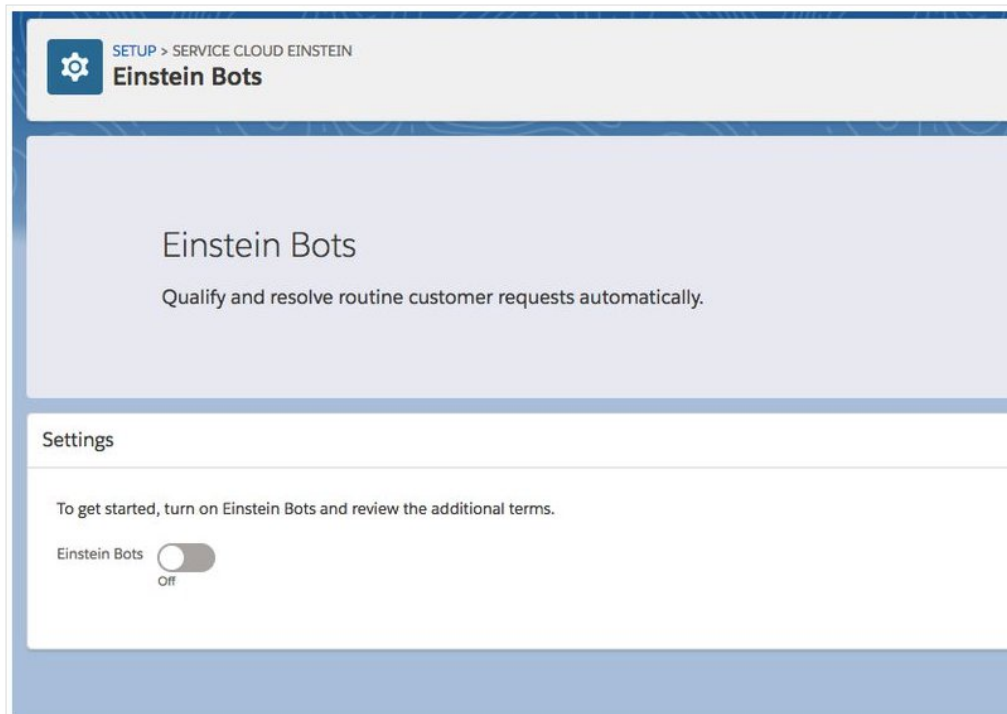
Follow these steps in the sequence listed.

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

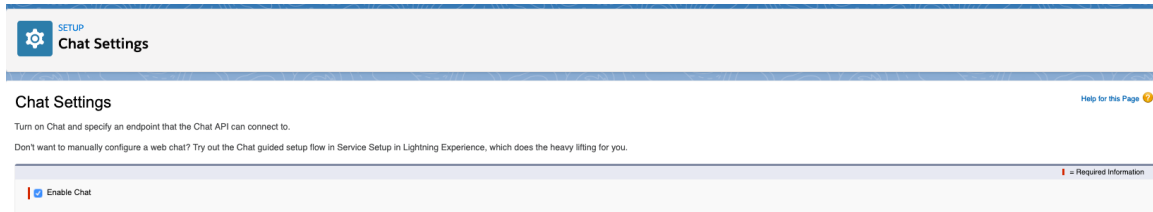
2. Enable Einstein Bot in your Org.

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



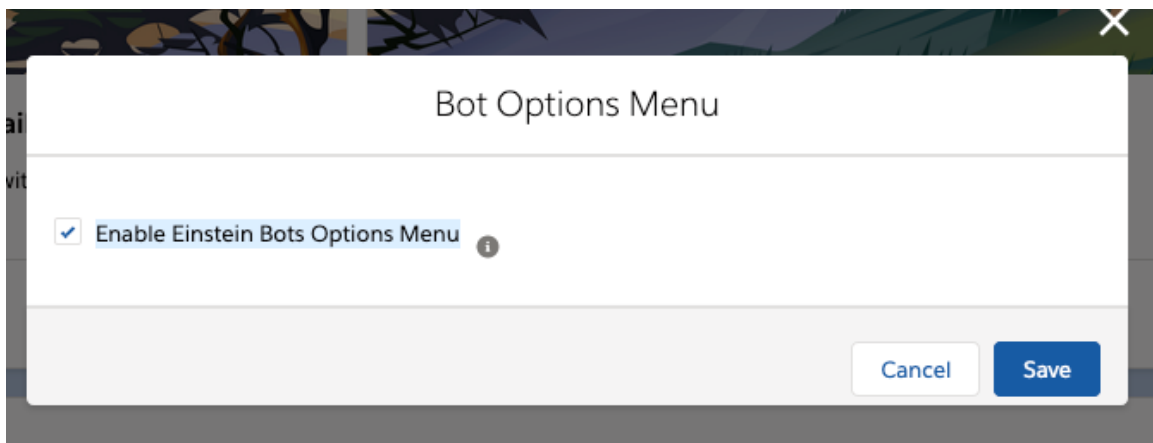
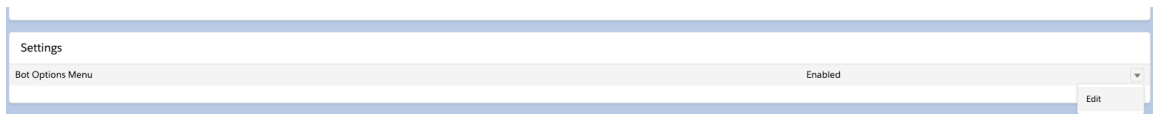
3. Enable Chat

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



4. Enable Bot Options Menu

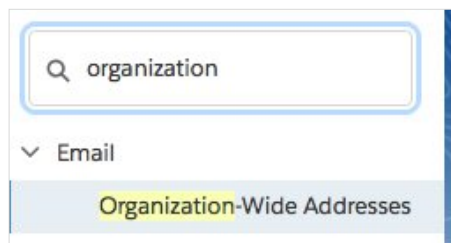
Go back to the Einstein Bots setup node in Lightning Experience setup, and click 'Edit' in the actions menu. Check the 'Enable Einstein Bots Options Menu' checkbox.



5. Organization wide Email Address

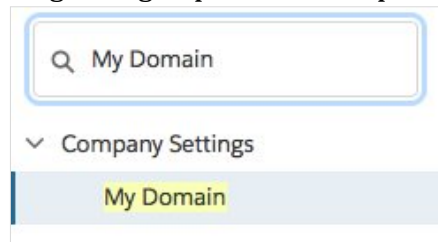
Make sure you have organization wide email address defined. This is needed for sending workflow email alerts. You can refer to this help article.

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

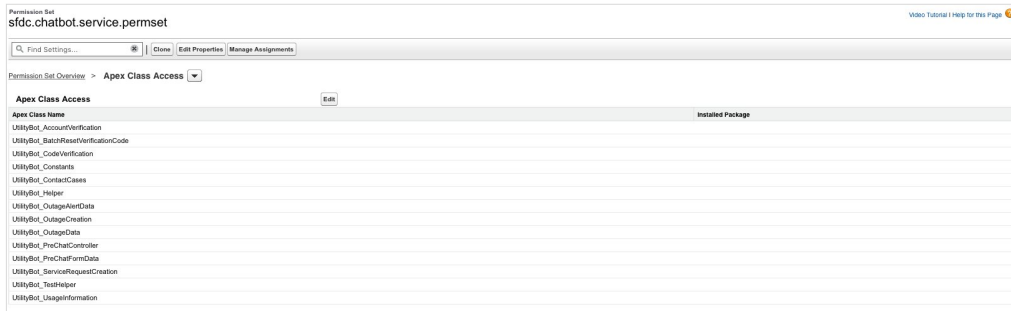
Install the app from the app exchange.

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:



- 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	☒	☐
	Shipping 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.

The screenshot shows the 'Omni-Channel Settings' page. At the top, there's a 'Welcome to Omni-Channel!' message followed by a detailed introduction to the solution. Below this is a 'Show diagram' button. A key instruction states: 'First, you need to enable Omni-Channel. Then, create Service Channels.' The main configuration area has two settings: 'Enable Omni-Channel' which is currently turned on (indicated by a blue toggle), and 'Use Skills-Based Routing' which is turned off. A red icon in the top right corner indicates 'Required Information'. At the bottom are 'Save' and 'Cancel' buttons.

- **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:

The screenshot shows the 'Routing Configuration' page for a configuration named 'OmniChannelRouting'. The 'Basic Information' section includes fields for 'Routing Configuration Name' and 'Developer Name', both set to 'OmniChannelRouting'. There is a warning message about overflow assignees. The 'Routing Settings' section includes 'Routing Priority' (set to 1), 'Routing Model' (set to Least Active), and 'Push Time-Out (seconds)'. The 'Work Item Size' section includes 'Units of Capacity' (set to 5.00) and 'Percentage of Capacity'. 'Save' and 'Cancel' buttons are at the top and bottom.

- **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:

Queue Edit [Save] [Cancel]

Queue Name and Email Address ! = Required Information

Enter the name of the queue and the email address to use when sending notifications (for example, when a case has been put in the queue). The email address can be for an individual or a distribution list. When an object is assigned to a queue, only the queue members will be notified.

Label UtilityBotQueue

Queue Name UtilityBotQueue ⓘ

Queue Email

Send Email to Members ☐

Configuration with Omni-Channel Routing

If your organization uses Omni-Channel, you can link queues to a routing configuration. This will push work from the queue to agents in the Console. See our [help](#) for more information about Routing Configurations.

Routing Configuration OmniChannelRouting ⓘ

Supported Objects

Select the objects you want to assign to this queue. Individual records for those objects can then be owned by this queue.

Available Objects

- Agent Work
- Consumption
- Goal
- Knowledge Article Version
- Lead
- Live Agent Session
- Macro
- Metric
- Order
- Outage
- Quick Text
- Scorecard

Selected Objects

- Case
- Live Chat Transcript

Add

Remove

4. Chat Setup

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

Deployments

« [Back to List: Live Chat Deployments](#)

Agent Configuration

[Edit]

Live Chat Deployment Name	UtilityBotDeployment
Developer Name	UtilityBotDeployment
Chat Window Title	Utility Support
Allow Visitors to Save Transcripts	☐
Allow Access to Pre-Chat API	☐
Permitted Domains	
Branding Image Site	
Chat Window Branding Image	
Mobile Chat Window Branding Image	

- 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.

Chat Buttons and Automated Invitations

« [Back to List: Chat Buttons and Automated Invitations](#)

Basic Information
Edit

Type	Chat Button
Name	UtilityBotChatButton
Developer Name	UtilityBotChatButton
Language	
Enable Customer Time-Out	☐
Customer Time-Out (seconds)	
Customer Time-Out Warning (seconds)	
Custom Agent Name	
Auto Greeting	

▼ Routing Information

Routing Type	Omni
Queue	UtilityBotQueue
Enable Queue	☐
Queue Size Per Agent	
Overall Queue Size	
Automatically Accept Chats	☐

▼ Chat Button Customization

Site for Resources	
Online Image	
Offline Image	
Custom Chat Page	
Pre-Chat Form Page	
Pre-Chat Form URL	
Post-Chat Page	
Post-Chat URL	

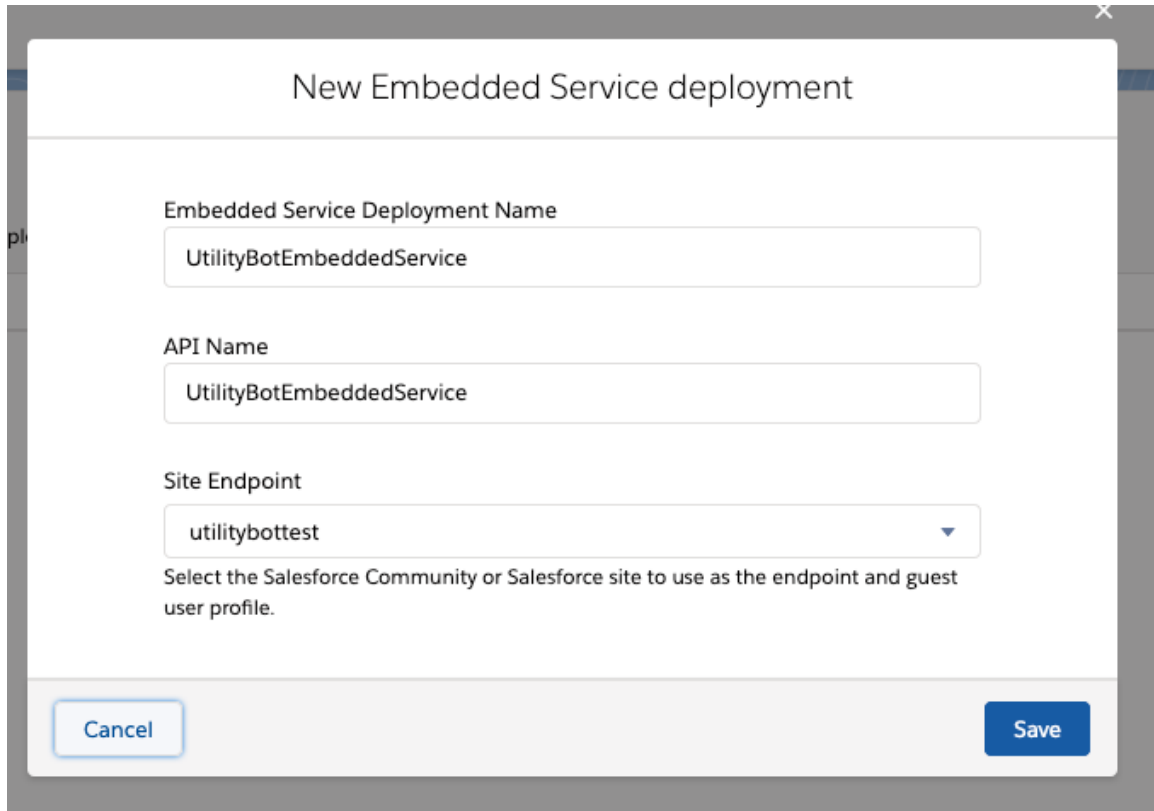
▼ Einstein Bots Settings

Einstein Bots Configuration	Utility Bot
Let customers connect to a bot only when an agent is available	☐

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 autopopulated. Site Endpoint should auto-populate to the site created in the previous step. Click save.



The screenshot shows a modal dialog titled "New Embedded Service deployment". It contains three input fields: "Embedded Service Deployment Name" with the value "UtilityBotEmbeddedService", "API Name" with the value "UtilityBotEmbeddedService", and "Site Endpoint" with a dropdown menu showing "utilitybottest". Below the dropdown is a note: "Select the Salesforce Community or Salesforce site to use as the endpoint and guest user profile." At the bottom of the dialog are two buttons: "Cancel" and "Save".

New Embedded Service deployment

Embedded Service Deployment Name
UtilityBotEmbeddedService

API Name
UtilityBotEmbeddedService

Site Endpoint
utilitybottest

Select the Salesforce Community or Salesforce site to use as the endpoint and guest user profile.

Cancel Save

- You will be taken to the following screen.

UtilityBotEmbeddedService

Edit



Site Endpoint: utilitybottest

Chat Settings Chat lets your customers start a conversation with your agents using an embedded chat window on your site or community page.	Inactive Start
Appointment Management Settings Allow customers to manage their appointments.	Inactive Start
Flow Settings Let your users complete simple tasks using an embedded Lightning flow.	Inactive Start
Branding Primary Color: #222222 Secondary Color: #005290 Font: Arial	Edit
Embedded Service Code Snippets Get your embedded service up and running on your website.	Get Code

- 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.

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

Pre-chat form

Select reason for visit

What kind of chats do your customers need?

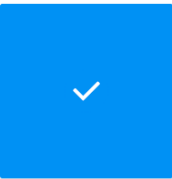
We match your customer's details from the pre-chat form with Salesforce records, or create records if we find no matches.



Sales
Link chats with leads.



Service
Link chats with cases and contacts.



Just Contacts
Link chats with only contacts.

Next

Pre-chat form

Now, let's design the pre-chat form

Customize this form based on details you want to collect from your customers.
For the best customer experience, include up to four fields.

Pre-Chat Fields

RECORD	FIELDS	REQUIRED	
Contact	Name	✓	↑ ↓ + ×
	Email	□	↑ ↓ + ×

Back Save

- 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.

Status: Enabled
Object: Contact
Pre-Chat Fields: Name, Email

Offline support
Status: Disabled
Offline support lets your customers log a case when your agents aren't online to chat.
Any time you change the status for offline support, make sure to regenerate the code snippet.

⚠ Guest Access to the Support API must be enabled on the site assigned to this embedded service deployment. [Enable on "utilitybottest."](#)

Additional branding
Base font size: Medium
Width: 320
Height: 498

Customize with Lightning Components
Use Lightning Web Components to customize your embedded service window. [Learn more.](#)

STANDARD COMPONENT	CUSTOM COMPONENT
Chat Header	None
Chat Messages (Text)	None
Minimized	None
Pre-Chat	None
	UtilityChatPreChat

6. Add Chat channel to the Bot

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

Settings
Bot Options Menu: Enabled

My Bots

Name	Description	Language	Bot User	Channels	Status
Utility Bot	This bot provides companies capabilities to address service re...	English			Inactive

Make sure you are the Overview section.

Einstein Bot Builder | Utility Bot - ver. 1

Overview

Bot Information

NAME	API NAME	DESCRIPTION	LANGUAGE	LAST MODIFIED	LAST MODIFIED BY
Utility Bot	Utility_Bot	This bot provides companies c...	English	Sep 30, 2020	Pradeep Shetty

Channels

You haven't added any channel deployments for your bot.

Settings

Bot Response Delay

Bot delay time

Default

Custom

Log Conversations

☒ Store Einstein Bots conversation data

Bot User

Bot performs actions as

Basic Chatbot User

Custom Chatbot User (Recommended)

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

This bot provides companies c... English Sep 30, 2020

Add Channel

* Channel

Chat

* Deployment

UtilityBotChatButton

☐ Require Agent Online ⓘ

Cancel Save

Channel	Deployment	Require Agent Online
Chat	UtilityBotChatButton	Off

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

The screenshot displays the 'Dialogs' page in the AI Assistant console. The main panel shows the configuration for a dialog named 'Welcome'. The 'Intent Name' is 'Welcome', and the 'Dialog Description' is empty. The 'Einstein' toggle is turned 'On'. The 'Dialog Details' tab is active, showing a message: 'If this is an emergency please call 9-1-1. Then call 1 800 123 1234.' Below the message, the 'Rules' section is visible, showing 'CONDITIONS' (empty) and 'RULE ACTIONS' (one action: 'Call Dialog'). The right sidebar shows the 'Preview' section, which includes the 'Embedded Service Channel' (UtilityBotEmbeddedService) and a 'Submit' button. A 'Chat with an Expert' button is also visible in the preview area.

Test Data Setup

- Create an Account and populate Account Number, Billing Address and Shipping Address. The Account number format should be AN-XXXXXXX (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.